Voyager 8.0 Release Notes

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1

Introduction

Voyager 8.0 is intended to offer customers new features that enhance workflows and simplify tasks, while providing greater control over various library resources.

Specific enhancements in this release:

- Facilitate database maintenance tasks by introducing new features to make global changes to library metadata
- Provide patrons with single sign-on capabilities when using other Ex Libris products
- Streamline workflows to order and receive shelf-ready materials
- Increase library staff productivity in various functional areas
- Improve the user experience for library patrons

Purpose of This Document

This document lists the various enhancements and changes that are new in Voyager 8.0. You can find them listed under the following topics:

- General on page 13
- Acquisitions on page 18
- Cataloging on page 20
- Circulation & Short Loans on page 22
- Global Data Change (GDC) on page 37

- System Administration on page 45
- WebVoyáge on page 51
- Primo Integration on page 55
- Voyager Analyzer on page 58

Voyager 8.0 Documentation

The following is a list of the primary documentation for Voyager 8.0:

- Voyager 8.0 Release Notes
- Voyager 8.0 User's Guides
- The Road to Voyager 8.0
- Voyager 8.0 Installation and Upgrade Requirements

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General

This section includes the following enhancements:

- Oracle 11g R2
- Operating system requirements
- Voyager client updates
- UNBIS thesaurus update
- Changing passwords in the Voyager clients
- Implementation of strong passwords
- Web services documentation

Oracle 11g R2

Purpose of Enhancement

Voyager is certified to run on Oracle 11g R2.

Description

Oracle 11g R2 is required to run Voyager 8.0.

Reference to Technical Documentation

For more information, see the *Voyager 8.0 Installation and Upgrade Requirements* guide.

Operating System Requirements

Purpose of Enhancement

Minimum operating system requirements have been established to be compatible with Oracle 11g R2.

Description

Operating system requirements for Voyager 8.0 are as follows:

- Solaris installation: Solaris 10, update 6 or later
- Linux installation: RHEL5, v5.2 or later
- AIX installation : AIX 5L, v5.3
- Windows installation: Windows Server 2003

Implementation Notes

An OS upgrade may be required for your Voyager environment prior to your upgrade to Voyager 8.0.

Reference to Technical Documentation

For more information, see the *Voyager 8.0 Installation and Upgrade Requirements* guide.

Voyager Client Updates

Purpose of Enhancement

Voyager clients have been packaged to allow future updates to be made to existing clients without requiring a complete re-installation and to allow for updates to be installed without administrative privileges.

Description

Once Voyager 8.0 clients have been installed, the version check in future releases enables you to download client updates without requiring a new installation of Voyager clients.

The client updates are downloaded from a locally-defined Voyager client update staging area.

Registration of the updated Voyager clients can be performed by users without requiring administrative privileges.

Two new `.exe` files are installed in the Voyager folder (`acquisitionsstart.exe` and `catalogingstart.exe`) to register the clients for each user on the PC. These new icons should be used instead of the previous shortcuts to open the Acquisitions and Cataloging modules, respectively.

Implementation Notes

The initial installation of the 8.0 clients still must be done by someone with administrative privileges. Future 8.x clients are updatable via the new update method by users who are administrative users.

An http server is needed to serve up the new client files. A list of updated files is provided in each new Voyager release. The `[Upgrade]` stanza in the `Voyager.ini` points to this http server.

When the client detects a new version is available, the user is prompted to complete an update. If the user elects not to update the clients, the currently running client closes. If the user updates the clients, the workstation retrieves all updated files from the http server. The newly downloaded clients are available immediately for use by non-administrative users.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Technical User's Guide* for more information.

UNBIS Thesaurus Update

Purpose of Enhancement

This enhancement updates the name of the UNBIS Thesaurus Tri-lingual List to UNBIS Thesaurus.

Description

The official name of the thesaurus was changed to recognize that it now includes more than three languages.

Implementation Notes

This thesaurus update is made automatically upon upgrade.

Changing Passwords in the Voyager Clients

Purpose of Enhancement

Staff users are able to change their own operator passwords using the Voyager clients.

Description

A new option, Change Password, has been added to the File menu in the following Voyager clients:

- Acquisitions
- Cataloging
- Call Slip
- Circulation
- Global Data Change
- Media Scheduling
- Media System Administration
- Reporter
- System Administration

The staff user needs to enter his old password and enter/confirm his new password.

Implementation Notes

When changed, the new password must comply with the strong password requirements described below.

Implementation of Strong Passwords

Purpose of Enhancement

The purpose of this enhancement is to enforce a set of guidelines for operator passwords.

Description

The following rules apply to operator passwords added or updated in Voyager 8.0 and later releases.

The new password must:

- Be a minimum of 8 and a maximum of 25 characters long
- Contain at least two alphabetical characters (upper or lower case)
- Contain at least one numeric character out of 0123456789
- Contain at least one special character from the following list: !@#$%^&*?~":;'=-.,
- Be different from the previous password

Implementation Notes

An operator's existing password remains in effect throughout and following the upgrade to Voyager 8.0. The new password rules take effect when a new password is created or an existing password is changed, either by the user or by the system administrator. System administrators can force a user to change his password by using the password expiration settings described in the System Administration section.

Web Services Documentation

Purpose of Enhancement

Documentation for the Search Service has been enhanced.

Description

Documentation was updated to describe how to use browse and relevance operators with the Search Service.

Reference to Technical Documentation

Documentation of the Voyager Web Services is available under Voyager Open Interfaces in the CodeShare area on EL Commons.

3

Acquisitions

This section includes the following enhancements:

- Invoice quick line item
- Pop-up charge and discharge notes for item records

Invoice Quick Line Item

Purpose of Enhancement

The purpose of this enhancement is to display the title on the Quick Line Item window when creating invoices.

Description

The title is added to the Quick Line Item display when creating invoices.

Implementation Notes

The title displays automatically when adding line items to invoices using the Quick Line Item window.

Pop-up Charge and Discharge Notes for Item Records

Purpose of Enhancement

This enhancement adds new charge and discharge notes for items.

Description

New item note types of charge and discharge have been added to Voyager. Charge notes display as pop-up alerts when the items are charged or renewed. Discharge notes display as pop-up alerts when items are discharged. Display of the alerts is controlled by a session preference within the Circulation client.

Implementation Notes

Charge and discharge notes can be entered on the item record within the Acquisitions module.

Reference to Technical Documentation

Refer to the *Voyager 8.0Acquisitions and Circulation User's Guides* for more information.

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Cataloging

This section includes the following enhancements:

- Suppress from OPAC check box
- Pop-up charge and discharge notes for item records

Suppress from OPAC Check Box

Purpose of Enhancement

The purpose of this enhancement is to tighten up the clickable area around the Suppress from OPAC check box.

Description

The clickable area around the check box was restricted so that it would not affect the OK to export check box.

Pop-up Charge and Discharge Notes for Item Records

Purpose of Enhancement

This enhancement adds new charge and discharge notes for items.

Description

New item note types of charge and discharge have been added to Voyager. Charge notes display as pop-up alerts when the items are charged or renewed. Discharge notes display as pop-up alerts when items are discharged. Display of the alerts is controlled by a session preference within the Cataloging client.

Implementation Notes

Charge and discharge notes can be entered on the item record within the Cataloging module.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Cataloging User's Guide* for more information.

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Circulation & Short Loans

This section includes the following enhancements:

- Display the comment field for requests
- Pop-up charge and discharge notes for item records
- Change patron barcode status to expired
- Allow the use of 4-digit PINs
- Display the call number in the Items Available for Pickup window
- New patron note types
- New posting types
- Patron pop-up note
- Discharge alert for items in temporary locations
- Alert when loan period shortened due to patron expiration
- Patron search preference
- Default setting for posting fines and fees
- Default settings for sensitize and magnetic media flags
- Increased size of the URL field
- Display item's location in the Discharge window
- Display notice date in Fines and Fees window
- Display discharge date in Fines and Fees window

- Option for refreshing the Charge display
- Default settings for expiration and purge dates for patron records
- SMS messages
- Update the SMS number on the patron record
- Short loan reservations on overdue items
- Alerts for items with subsequent short loan booking
- Override for overnight short loans

Display Comment Field for Requests

Purpose of Enhancement

The purpose of this enhancement is to display the information entered in the comment field of a request as a pop-up alert when the item is discharged and print the comment on the hold slip.

Description

Comments entered into holds, recalls, and call slips display in the Item Information section of the Item Blocks and Information window when the item is discharged and the comment prints on the hold slip.

Implementation Notes

This feature is automatic. The label for the comment field can be configured in the `[HOLD SLIP]` stanza of the `circ.ini`. The default label is `CommentLabel=Patron Comment:`.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Pop-up Charge and Discharge Notes for Item Records

Purpose of Enhancement

This enhancement adds new charge and discharge notes for items.

Description

New item note types of charge and discharge have been added to Voyager. These new note types display as pop-up alerts when the items are Charged, Renewed, and Discharged. Display of the alerts is controlled by a session preference within the Circulation client.

Charge and discharge notes can be entered on the item record within the Circulation module.

Implementation Notes

By default, these alerts are turned on. Individual operators may disable them under `Options > Session Preferences > Alerts`.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Change Patron Barcode Status to Expired

Purpose of Enhancement

This enhancement provides a new batch job that synchronizes the patron barcode status when the patron's record expires.

Description

Circjob 44 has been added to Voyager to change the patron barcode status from Active to Expired for selected groups of patrons whose patron expiration date is on or after a specified date.

This job can be run directly from the server or from the WebAdmin interface.

Implementation Notes

Input parameters allow the staff member to specify one or more patron groups by patron group code. Additionally, the job can be run with a cutoff date. Only patrons whose records expired on or before the specified date have their barcodes expired. If no date is specified, the current date is used as the default.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Allow Use of 4-digit PINs

Purpose of Enhancement

This enhancement allows the patron PIN number to have a minimum of four characters rather than the previous minimum of five characters.

Description

The minimum requirement for patron PINs has been set at four characters. The maximum size is still 12 characters.

Implementation Notes

Current patron PINs are not affected.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Display the Call Number in the Items Available for Pickup Window

Purpose of Enhancement

This enhancement adds the call number to the Items Available for Pickup window.

Description

The call number has been added to the Items Available for Pickup window of the Holds/Recalls and Short Loans tab of the Patron Request Information display.

Implementation Notes

The call number is displayed from the `MFHD_MASTER.DISPLAY_CALL_NO` field.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

New Patron Note Types

Purpose of Enhancement

This enhancement allows the library to use new patron note types in Circulation.

Description

Libraries can define new patron notes types in the Circulation section in System Administration. Once the note type has been created, it displays in the note type dropdown within Circulation and can be used for notes.

Implementation Notes

New patron note types must be created in System Administration.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation System Administration User's Guides* for more information.

New Posting Types

Purpose of Enhancement

This enhancement allows the library to use new posting types in Circulation.

Description

Libraries can define new posting types in the `System > Fines/Fees` section in System Administration. Once the posting type has been created, it displays in the posting type dropdown within Circulation and can be used for fines and fees or demerits.

Implementation Notes

New posting types must be created in System Administration.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation System Administration User's Guides* for more information.

Patron Pop-up Note

Purpose of Enhancement

This enhancement displays a patron pop-up note when the patron record is retrieved.

Description

The patron pop-up note displays whenever the patron record is retrieved. Previously, the patron pop-up note was displayed only when the patron record was retrieved in the Charge window.

Implementation Notes

The patron pop-up note alert is controlled by a preference setting in the Circulation client. By default, this setting is turned on. The behavior for this pop-up alert mimics the display of the pop-up note in the Charge window.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Discharge Alert for Items in Temporary Locations

Purpose of Enhancement

This feature displays an alert when an item discharged is shelved in a temporary location.

Description

An alert is displayed to tell the operator that the discharged item is shelved in a temporary location. The current location of this item is then displayed in the Discharge window.

Implementation Notes

The Temporary Location Alert on Discharge is controlled by a preference setting in the Circulation client. By default, this alert is turned on.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Alert When Loan Period is Shortened Due to Patron Expiration

Purpose of Enhancement

This feature shows the staff operator an alert when the loan period is shortened due to the patron's expiration date.

Description

A pop-up note alerts the operator when an item's loan period has been shortened due to the patron's expiration date. The patron's expiration date is given, and the operator is able to proceed with or cancel the transaction. If the Circulation operator selects Cancel, the charge transaction is not completed.

Implementation Notes

The Loan Shortened Due to Patron Expiration Alert is controlled by a preference setting in the Circulation client. By default, this alert is turned on.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Patron Search Preference

Purpose of Enhancement

This enhancement provides a user-defined preference for the patron search feature.

Description

A new option exists in the Session Preferences in Circulation to select a default method when searching for patrons. The default for this preference is Name.

Implementation Notes

This client-specific setting can be set under Session Preferences in the Circulation client.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Default Setting for Posting Fines and Fees

Purpose of Enhancement

This enhancement provides a user-defined preference for posting fines/fees and demerits.

Description

Staff operators can select a default setting for posting fines/fees and demerits. Available choices are selected, displayed, or patron total.

Implementation Notes

Staff operators can set this default in the Session Preferences in the Circulation client.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Default Settings for Sensitize and Magnetic Media Flags

Purpose of Enhancement

This feature allows the operator to set a default for the sensitize and magnetic media flags when item records are created in Circulation.

Description

Two new preferences have been added to the Item/E-Item Creation fields to specify the default settings for the sensitize and magnetic media flags when item records are created in Circulation.

Implementation Notes

The preferences are located on the Items and Searching tab in Session Preferences. By default, both of these check box settings are clear (off).

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Increase the Size of the URL Field

Purpose of Enhancement

This enhancement increases the size of the URL field used for e-items.

Description

The size of the `EITEM.LINK` field has been increased from 255 characters to 2048, which is the maximum URL size for Internet Explorer.

The Link/URL input box on the Create/Edit E-Item displays in Circulation have been modified to accommodate the longer URL field.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Display Item's Location in the Discharge Window

Purpose of Enhancement

This feature adds the current location of the item to the Discharge window.

Description

The current location of the item being discharged has been added to the Discharge window. A [T] or [P] displays with the location to indicate a temporary or permanent location.

Implementation Notes

This field has been automatically added to the display.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Display Notice Date on Fines and Fees Window

Purpose of Enhancement

This enhancement displays the date of the billing notice on the Fines and Fees window.

Description

The Notice Date has been added to all tabs in the Fines and Fees windows.

Implementation Notes

This information was previously labeled Billed. The data comes from the same source as in previous releases.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Display the Discharge Date in the Fines and Fees Window

Purpose of Enhancement

This enhancement displays the discharge date on the Fines and Fees/Demerits window.

Description

The discharge date has been added to all tabs in the Fines/Fees and Demerits windows.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

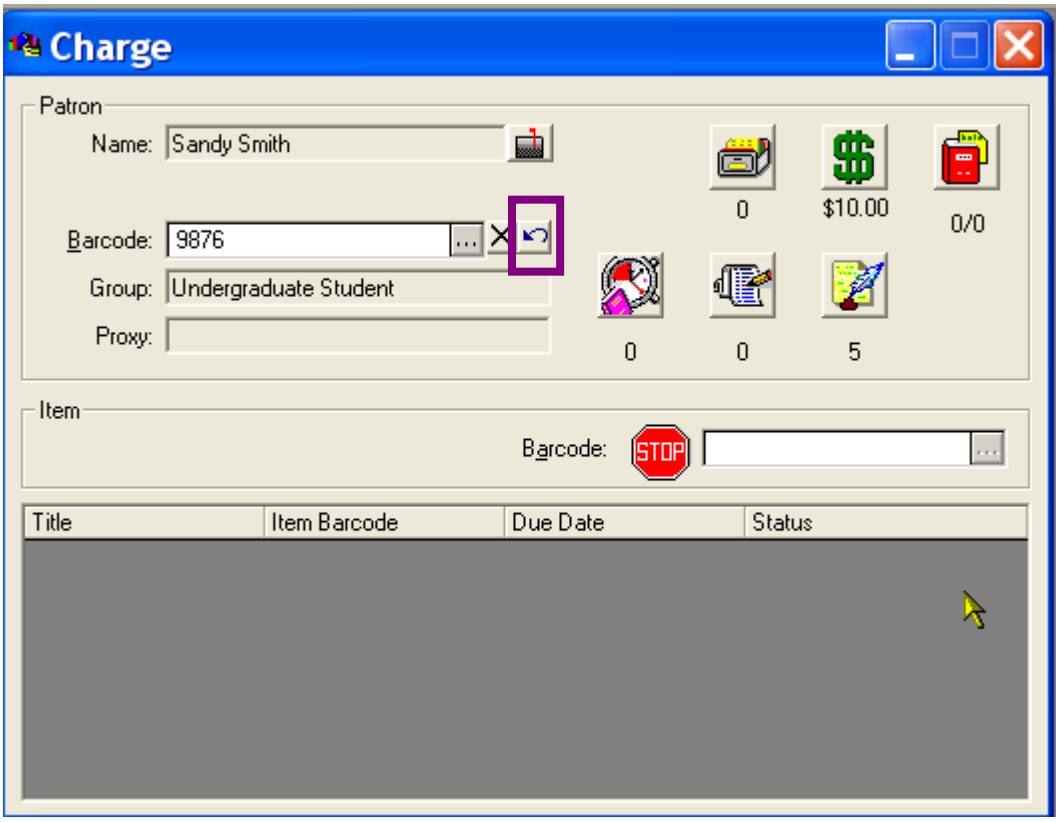
Option for Refreshing the Charge Window

Purpose of Enhancement

This feature provides a button to refresh the Charge window after resolving patron blocks.

Description

A button has been added to the Charge window to allow an operator to refresh the patron information after resolving blocks. This refresh button permits the operator to continue with the current transactions without the need to re-enter the patron's barcode.



Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Default Settings for Expiration and Purge Dates for Patron Records

Purpose of Enhancement

This feature supplies default expiration and purge dates for patron records that are created manually.

Description

Default expiration and purge dates are added to the patron record automatically when you begin to add a new patron record in the Circulation client.

Implementation Notes

The default dates are based on the settings for Patron Default Dates in System Administration. The system allows either an exact date or a date relative to today, in years, months, or days. The maximum value is 9999.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation and System Administration User's Guides* for more information.

SMS Messages

Purpose of Enhancement

This enhancement adds the ability to send patron notices via SMS (Short Message Service).

Description

SMS notices can be sent to patrons for overdue items, for items that are available for pickup, and for items that have been recalled. Use of SMS messages augments other notification methods, print and e-mail. This is an optional service.

The default SMS messages can be customized by the library. Patrons can opt-in to receive SMS notifications by adding their SMS numbers to their records via the OPAC. Similarly, patrons can opt-out of receiving SMS messages by removing their SMS numbers from their patron accounts.

Implementation Notes

Implementation of this feature requires setup of the Ex Libris SMS Proxy and subscription service from an SMS gateway/service provider.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* and the *SMS Proxy User's Guide* (available in the cross-production section of the Ex Libris Documentation Center).

Update the SMS Number on the Patron Record

Purpose of Enhancement

This feature allows a staff operator to add, edit, or remove a patron's SMS number through the Circulation client.

Description

Authorized library staff members can edit the patron information display to add, edit, or remove a patron's SMS number. The SMS number is available on the Name tab in the Patron Record display.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Short Loan Reservations on Overdue Items

Purpose of Enhancement

This feature adds an option for libraries to allow short loan bookings on overdue items.

Description

A new option has been added to the short loan policy matrix to allow selected patron group/item type combinations to place reservations on short loan items that are currently overdue. If the flag is not turned on to allow bookings on overdue items, reservations are unavailable until the items have been returned.

Implementation Notes

This setting is controlled by the library's short loan policy matrix in System Administration.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Alerts for Items with Subsequent Short Loan Bookings

Purpose of Enhancement

This feature provides an optional alert when short loan items are returned and have future bookings.

Description

An alert displays to the operator to advise of future short loan bookings when the item is discharged. The alert is triggered if the future bookings are within the Advanced Loan Warning Period established in System Administration. This alert is optional and can be turned on or off in the Session Preferences in Circulation. By default, this setting is turned on during your upgrade.

Implementation Notes

This setting is controlled by the Short Loan Advanced Booking Alert in the Session Preferences in Circulation and by the Advanced Loan Warning Period setting in the Circulation Policy Matrix settings in System Administration.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Override for Overnight Short Loans

Purpose of Enhancement

This feature enforces the library's overnight loan rules for short loan items, regardless of the loan period.

Description

A new option has been added to the short loan policy matrix to allow the library to enforce the overnight loan policies for each selected patron group/item type combination. If used, the overnight loan policies are executed, whether the in effect time has been reached or not.

If a short loan item is reserved for a period starting some time after the library opens, the item may still be booked for a shorter interval prior to the existing booking.

Implementation Notes

This setting is controlled by the library's short loan policy matrix in System Administration.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

6

Global Data Change (GDC)

Global Data Change is a completely new module introduced in Voyager 8.0. This major addition to the core Voyager modules provides users with an integrated solution for making mass data changes to bibliographic, holdings, and authority records residing in the Voyager database.

Largely the result of the joint efforts of Voyager customers and the Voyager team at Ex Libris, this new module gives library staff the ability to manipulate MARC data in powerful new ways.

The Global Data Change Task Force (TF) (2003-2006) and the Global Data Change Advisory Group (AG) (2007-present) deserve special mention for their contributions to the development of this module.

Members of these groups included:

- Karen Davis, Georgia State University (TF, AG)
- Michael Doran, University of Texas at Arlington (TF, AG)
- Margaret Foote, Eastern Kentucky University (TF, AG)
- Ulla Ikäheimo, The National Library of Finland & University of Helsinki (TF, AG)
- Ann Della Porta, the Library of Congress (TF, AG)
- Michelle Rusiniak, Monash University (AG)
- Patricia Scott, University of Adelaide (TF)
- Gary Strawn, Northwestern University (TF, AG)
- Charles Woods, University of Waterloo (TF, AG)

The main components of Global Data Change include:

- A staff client interface
- Record selection functionality
- Transformations and rules for changing MARC records
- Preview capabilities
- Executing data changes
- Job/Queue management
- GDC security profiles

This section briefly describes the following features:

- Global Data Change client
- GDC workflows
- Scan feature
- GDC security profiles

Reference to Technical Documentation

Refer to the *Voyager 8.0 Global Data Change User's Guide* for more information on this functionality.

Global Data Change Client

Description

The GDC client is a comprehensive graphical user interface to the module, similar to but separate from the Cataloging client, that includes the ability to:

- Select records by searching with indexes or scanning the entire database and saving those records into sets
- Generate rules for operating on records with the ability to save and modify such rules
- Preview the rule changes on a record or group of records before actually submitting the changes
- Submit a job for changing a group of records with a specified rule set with options to schedule and cancel jobs plus view logs of jobs completed

The GDC client can be installed on individual work stations as needed and is independent of the Voyager Cataloging client. Privileges to use this module are configured in Voyager System Administration.

GDC Workflows

The general workflow for global data change is as follows:

- Select bibliographic, MFHD, or authority records that should be changed
- Create rules for making changes to the records
- Check the rules with the preview functionality prior to job execution
- Schedule data change jobs and recover from errors if necessary

Record Sets

Staff members can use existing Composite, Headings, Left-anchored, and Keyword searches to search for bibliographic and holdings records. Authority searching in Voyager does not lend itself to creating record sets. Also, call number browsing does not produce finite sets and so cannot be used to add records to sets.

When you perform a browse search (except for call number browse), the record set is created from the titles list of a group of records with the same heading.

Record sets must be homogenous. That is, a record set must contain only bibliographic, or holdings, or authority records.

The Global Data Change client contains several new features to support the creation of record sets.

- The Search History tab contains new functionality that allows staff members to permanently save searches for retrieval later. Searches are saved globally within a Voyager database and are thus available to everyone using the GDC module. Saved searches do not include limits that were used to conduct the search.
- Record sets can be created from the titles list screen from the results of Keyword, Index Selection, or Builder searches. All records from the search results are saved either to a new set or to an existing set, even when there are more than 10,000 results.
- The staff user is also able to select records using criteria that are not part of standard indexes. Using Voyager's new scan feature, record selection is done by reviewing individual records one-by-one.
- Records may also be added to a record set by entering the record ID number. Users may enter the record numbers using the GDC client or by uploading a text file containing the record numbers, each on a separate line.

Data Change Rules

Authorized staff members are able to create data change rules using an easy-to-manipulate GUI interface.

The following rules can be applied to records in a set. In all operations, it is possible to specify the instance of the field/subfield, numerically or by specifying last or all.

Operation	Description	Operates On
Add	Add entire field/fixed field. You may specify a tag that will immediately precede the new field. Add entire subfield. You must specify a tag and may specify a subfield that immediately precedes a new subfield.	Variable data field, subfield, fixed field
Copy	Copy an entire field to a new tag. Copy a subfield to a new subfield within a tag. Copy a subfield from one tag to another.	Field, subfield
Update	Change tag or subfield designator. Change indicators.	Field, subfield
Delete	Remove field or subfield completely. Also operates on the entire record, with special permission to run.	Field, subfield, fixed field, record
Change string	Find and replace. This can be used to find and replace with nothing (remove a string).	Field (searches entire field for string and can use a subfield character ‡) Subfield (searches only subfield for the string) Fixed fields (positional)
Stop processing	Used after a conditional (see the next table). For example, if this condition exists, do nothing else on this record and move onto the next record.	All

Use a previously saved rule	Perform the rules saved in another transformation rule. Provides the ability to perform commonly used groups of rules.	All

For each of the above rules, a condition (test) may be applied before the rule is applied. Only if logic is supported, not else logic.

Operation	Description	Operates On
Exists	Check for the existence of.	Field, subfield, fixed field
Does not exist	Check if something does not exist.	Field, subfield, fixed field
Value matches specified value	Check if the value specified matches the existing value in a record May use the truncation and match characters (*, ?).	Field, subfield, fixed field position(s)
Value does not match specified value	Check that the value specified does not match the existing value in a record. May use the truncation and match characters (*, ?).)	Field, subfield, fixed field position(s)

Rules can be saved with a name given by the operator and are viewable in a list with modification options such as delete, copy, and edit. Rules are saved first in rule documents. Subsequently, rule documents are combined into a single rule set.

Preview

In the GDC client, it is possible to preview changes to record sets on a record-by-record basis. Also, it is possible to preview changes on the entire record set and view the changes in a file by running the job with `update database = N`.

In the GDC client, staff members first select a transformation rule and then select either a single record by entering the record number or by selecting a previously saved record set. For each record, the original record is shown on the left, and the modified record on the right. The modified record is shown with the entire transformation rule applied and with the changes to the transformed record highlighted. No effort is made to apply portions of the transformation rule to the record if the transformation rule contains multiple steps.

While the record and its potential modification is on the screen, options display at the bottom of the preview screen for:

- OK, leave this record in the set and move onto next record in the set
- Move ahead x number of records
- Remove this record from the set and move on to the next record in the set
- Cancel out of the preview process
- Previous record to go back one record

A staff member is also able to preview changes to an entire (possibly large) dataset by executing the changes as a job but selecting `update = N` on job submission. The staff member can then use the log files to preview the changes to the records.

Executing a Data Change

It is possible to execute changes for a specific set of records using a specified transformation rule. There are no limitations on the number of records that are allowed in a set, nor on the number of records that are allowed to be modified. Changing everything in the database may take a lot of time since records are changed one after another, but it can be done.

The execution of changes are done via a job submission which is managed by a queue in the same interface that is used for rule and set maintenance.

Allowing the staff member to select `N` to make changes provides an option to test changes on records without actually making the changes in the database. They can review the changed records in the log file. The reviewing of the changed records can either be done in the client by viewing the changed record file or at a Unix prompt by using Unix tools on the file.

Running jobs, submitted jobs, and completed jobs can be viewed in the GUI interface with options for editing the job (in the case of submitted jobs) or viewing information about the job (in the case of running or completed jobs). Currently running and/or submitted jobs are on one screen/tab, and completed jobs are on a second screen/tab.

For currently running or completed jobs, it is possible to view the following from the GUI interface:

- An option to kill the job for the currently running job. There are no options to restart/recover a killed job.
- The log information about the job available by clicking a button and seeing the log information on the screen. The log file contains running updates on the job, indicating how many records were processed in groups of 1000. The log also contains errors about updating records such as "Cannot delete bib record 12345, has MFHD and item attached." The log can be viewed in Notepad.
- A job summary, separate from the log, that shows the running or complete total number of records processed, modified, and skipped.

- A link to the file that contains the original (pre-change) version of the MARC record. If the job was submitted with make `Changes=N`, then this file contains records as if the records had been changed in the database.

  This file is viewable in the GUI interface in Notepad and may be viewed as it is being created, that is, while the job is still running (but needs to be reopened to see newly added records). This file contains Unix-viewable text. It may also be viewed at the Unix prompt and may be manipulated with standard Unix routines like grep.
- A option to delete the log file for this job.
- An option to delete the original saved record file for this job.

After the record is changed, the record history is updated with the date of change and operator who ran the job.

Scan Feature

Description

A scan can be run on the entire database, a document number range, or on a previously-generated record set. Options for selecting records by scanning include:

- Date range of the last update
- Cataloger of the last update
- Tag + indicator containing subfield + text
- Tag + indicator and/or subfield exists
- Leader/fixed fields containing character(s) in certain positions
- Leader/fixed field exists
- Any combination of up to six, single-byte characters in the entire record (such as six consecutive encoded bytes)

Scan jobs are usually run in the background and may take longer since records must be reviewed one-by-one.

GDC Security Profiles

Description

Operator security profiles for Global Data Change are similar to the profiles for other Voyager modules.

Profiles are created in the Security section in System Administration. Global Data Change profiles contain the following:

- Profile name
- Operators assigned to this profile
- Profile values

  Generally, this includes options to add, update, delete, and view record sets, scan rules, and data change rules. Special permission is required in order to use a rule to delete an entire record. Options to preview, execute data change jobs, view job logs, remove log files, remove MARC files, and to terminate jobs are also controlled separately.

- Locations

  Locations from the database that are assigned to an operator profile limit the records an operator can modify. If a record that is not in the operator's location group is added to a set, the set is still run; but the record that is outside of the location group remains unchanged and a note is added to the log file for this record.

Reference to Technical Documentation

Refer to the *Voyager 8.0 System Administration User's Guide* for more information regarding these configuration options.

7

System Administration

This section includes the following enhancements:

- Security profiles for Global Data Change
- Operator password expiration
- Short loan settings
- Patron default dates
- New posting types
- New patron note types

Security Profiles for Global Data Change

Purpose of Enhancement

New security profiles are available to set privileges for staff to use the new Global Data Change module.

Description

Security permissions must be defined for operators to use the Global Data Change functionality introduced in Voyager 8.0. Global Data Change profiles are configured in the Security area in System Administration. Like the profiles for other modules, GDC profiles contain a profile name, operators, profile values, and locations assigned to the profile.

Profile values allow the library to assign permissions to work with record sets for bibliographic, holdings, or authority records; data change or scan rules; work with jobs for bibliographic, holdings, and authority records; and manage the log files.

Implementation Notes

Global Data Change profiles must be created by the System Administrator and operators must be assigned to a profile before they are able to use the Global Data Change module.

Reference to Technical Documentation

Refer to the *Voyager 8.0 System Administration User's Guide* for more information regarding these configuration options.

Operator Password Expiration

Purpose of Enhancement

The purpose of this enhancement is to provide a method to expire operators' passwords after a library-defined interval has passed.

Description

The system administrator may set a library-defined interval that forces operators' passwords to expire. The system administrator also has the ability to immediately expire an operator's password when necessary. Optionally, the system administrator can set individual passwords to never expire.

A new field indicates whether the password is Active or Expired.

Once an operator's password has expired, he is able to change it using the Change Password feature in the Voyager clients.

Implementation Notes

The password expiration setting is included in the Security options in System Administration. The system administrator should enter the number of days after which operator passwords expire. The maximum setting is 999 days. Entering a zero (0) indicates that operator passwords never expire automatically.

At the time of upgrade, the default setting is zero (0) days. To use this feature, the system administrator may want to initially set a short interval to expire passwords following the upgrade and then adjust this setting for longer intervals as desired, per the site's policy, to force passwords to expire in the future.

Additionally, the system administrator can set a specific operator's password to never expire or manually expire an operator's password by editing the operator's profile.

Reference to Technical Documentation

Refer to the *Voyager 8.0 System Administration User's Guide* for more information regarding these configuration options.

Short Loan Settings

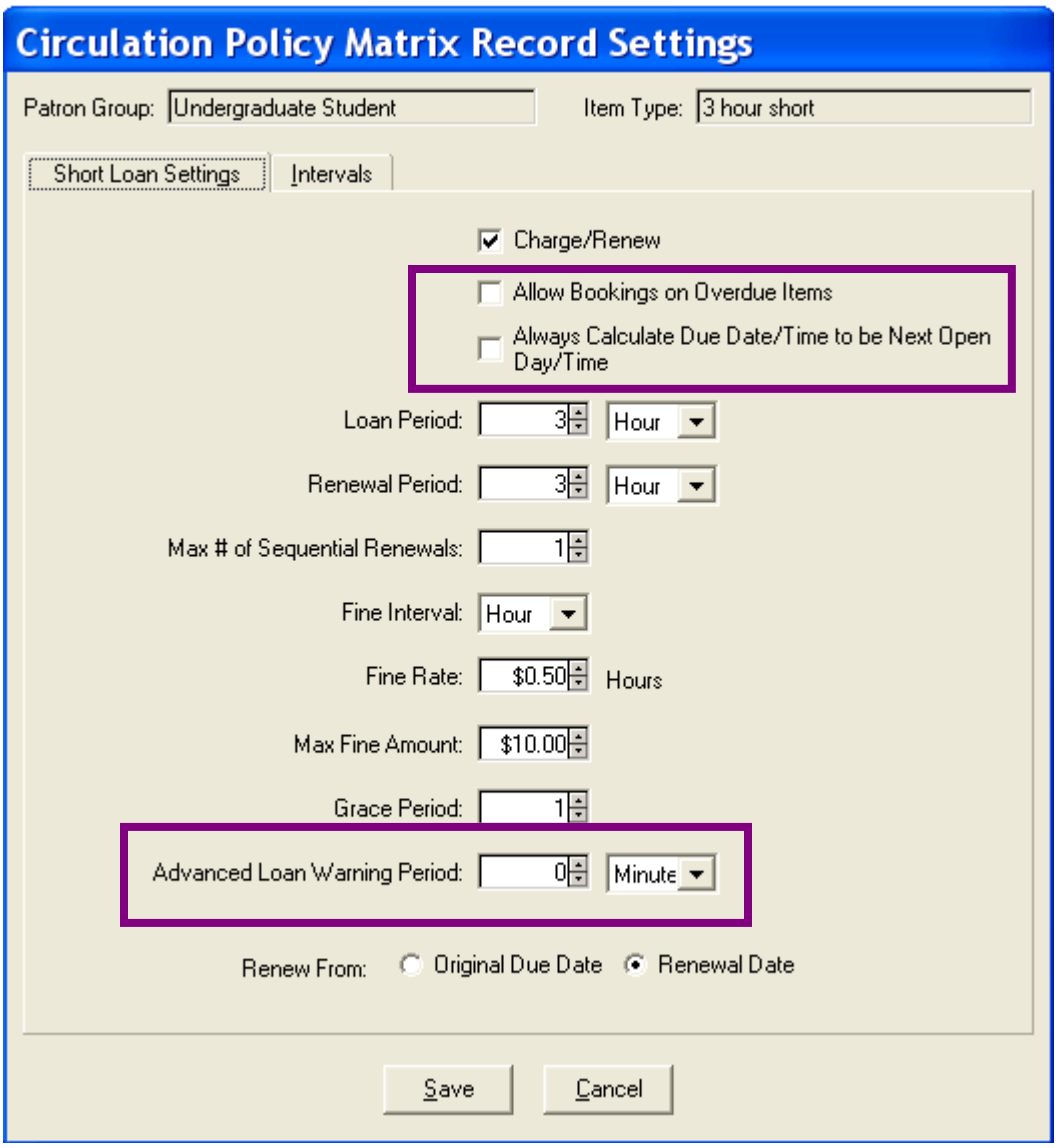
Purpose of Enhancement

New options have been added to the Short Loan matrix to permit borrowers to place reservations on overdue short loan items, to force short loans to use overnight loan policies, and to set an interval to display an alert for upcoming bookings when a short loan is returned.

Description

These new options can be found on the Circulation Policy Matrix Record Settings for the Short Loan Matrix tab (Circulation > Policy Definitions) in System Administration.

The Advance Loan Warning Period can be set to minutes or hours with a maximum value of 999. This setting works in combination with the preference setting for the Short Loan Advance Booking Alert in the Circulation client.



Implementation Notes

The settings are independent of each other but may be used in combination.

Because the settings are at the Circulation Policy Matrix Record level, they must be set for each patron group/item type combination to which they apply.

Reference to Technical Documentation

Refer to the *Voyager 8.0 System Administration User's Guide* for more information regarding these configuration options.

Patron Default Dates

Purpose of Enhancement

Configuration options have been added to System Administration to set default expiration and purge dates for patron records that are manually created.

Description

The system administrator can set default patron expiration and purge dates which are automatically applied to patron records created manually in Circulation. The system allows either an exact date or a date relative to today in terms of years, months, or days. The maximum value is 9999.

These dates are automatically supplied when the operator starts to create a new patron record in the Circulation client.

Implementation Notes

These settings are found under Patron Default Dates in the Circulation area in System Administration.

Reference to Technical Documentation

Refer to the *Voyager 8.0 System Administration User's Guide* for more information regarding these configuration options.

New Posting Types

Purpose of Enhancement

This feature allows the library to define new posting types.

Description

Libraries can create, edit, and delete posting types in System Administration. The maximum length of the posting type name/description is 25 characters and can include spaces. Posting types can be defined for use with fines and fees, demerits, or both.

Implementation Notes

These setting are found under Fines/Fees in the System area in System Administration. System-supplied posting types cannot be edited or deleted.

Reference to Technical Documentation

Refer to the *Voyager 8.0 System Administration User's Guide* for more information regarding these configuration options.

New Patron Note Types

Purpose of Enhancement

This feature allows the library to define new patron note types.

Description

Libraries can create, edit, and delete patron notes types in System Administration. The maximum length of the note name/description is 25 characters and can include spaces. Note types that are in use cannot be deleted.

Implementation Notes

These setting are found under Patron Note Types in the Circulation area in System Administration. System-supplied patron note types cannot be edited or deleted.

Reference to Technical Documentation

Refer to the *Voyager 8.0 System Administration User's Guide* for more information regarding these configuration options.

8

WebVoyáge

This section includes the following enhancements:

- Barcodes on request forms
- Allow use of 4-digit PINs
- Add SMS number to patron record
- Patron Directory Services (PDS)

Barcode on Request Forms

Purpose of Enhancement

Suppress the barcode/ID prompt on request forms once a patron has logged in to WebVoyáge.

Description

A new option has been added to `webvoyage.properties` to make the patron barcode/ID request prompt optional. If the patron barcode prompt is suppressed on the request forms, Voyager checks all of the patron's barcodes to see if the patron is allowed to place the request for the item.

Implementation Notes

A new section, Patron Requests barcode/IID input:, has been added to `webvoyage.properties`. with the new variable, `page.patronRequests.idPrompt`.

The variable options are `Y` and `N`. Entering `N` for this variable causes the patron barcode prompt to be suppressed on the request forms. Entering `Y` causes the patron barcode prompt to display on the request forms. The default value at the time of upgrade is `Y` in order to preserve existing workflows.

Reference to Technical Documentation

Refer to the *Voyager 8.0 WebVoyage Architecture Overview and Configuration Models* guide.

Allow the Use of 4-Digit PINs

Purpose of Enhancement

This enhancement allows the patron PIN number to have a minimum of four characters rather than the previous minimum of five characters.

Description

The minimum requirement for patron PINs has been set at four characters. The maximum size is still 12 characters.

Implementation Notes

Current patron PINs are not affected. Libraries can turn PINs on in WebVoyáge in the `webvoyage.properties` file. A comment has been included in the `webvoyage.properties` file to indicate that PINs can be 4 to12 characters in length and are case sensitive.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* for more information.

Add SMS Number to Patron Record

Purpose of Enhancement

This feature allows the patron to add, update, or remove his SMS number from the My Account display in WebVoyáge.

Description

A patron is able to add, update, or remove his SMS number from the Personal Information page in WebVoyáge.

Implementation Notes

The SMS number display is optional in WebVoyáge and must be enabled by the library. Settings to configure the SMS number display can be found in `webvoyage.properties`. The new option, `option.SMS`, has `Y/N` variables. Entering `Y` for this option means that the patron can see and edit his own SMS number in WebVoyáge. The default value for this option, at the time of upgrade, is `N` to preserve existing functionality.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Circulation User's Guide* and the *SMS Proxy User's Guide* (located in the cross-product section of the Ex Libris Documentation Center) for more information.

Patron Directory Services (PDS)

Patron Directory Services is a back-end component that facilitates user authentication and login to a calling application.

Purpose of Enhancement

This enhancement is to expand the PDS support in Voyager to allow it to be used as a standalone option for patron authentication into Voyager or as a single sign-on interface when used with other Ex Libris products.

Description

Support for PDS has been added to WebVoyáge so that PDS can be used as a standalone option for authentication into the Voyager OPAC. Additionally, when PDS is used as the authentication mechanism for other Ex Libris products, PDS provides single sign-on capabilities between Voyager and Aleph, Primo, MetaLib, and DigiTool. PDS can be used

in place of the existing Voyager authentication tools and the WebVoyáge external authentication adapter.

Implementation Notes

PDS must be enabled in the `web.xml` file on the Voyager server. To use PDS, you must set the `PDSEnabled` option to `True`. The default value, following your upgrade, is `False` to preserve existing functionality.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Webvoyáge Architecture Overview and Configuration Models* guide and the *Patron Directory Services Guide* (located in the cross-product section of the Ex Libris Documentation Center) for more information.

9

Primo Integration

This section includes the following enhancements:

- Exporting e-items for Primo
- Performance improvements in the Voyager extract
- Updates to the `Primoexp-*.ini`

Exporting E-items for Primo

Purpose of Enhancement

This enhancement to the Voyager extract for Primo allows the library to include e-item records in the records extracted for course reserve materials.

Description

Voyager 8.0 includes modifications to the Voyager database to facilitate tracking of e-items when records are updated and deleted. The Primoexp job has been modified to include an option to include e-items in the Voyager extract.

A new log file called `deleted.e-items.yyyymmdd` has been created to track deleted e-items.

A new field, `EITEM.RESERVE_LIST_UPDATE`, has been added to the e-item table. This field is updated whenever an e-item is attached to or removed from a reserve list.

The extract routine has been modified to check if the linked `RESERVE_LIST.EXPIRE_DATE` or `RESERVE_LIST.EFFECT_DATE` has passed but is earlier than the Changed Since date.

Implementation Notes

The `Primoexp-*.ini` configuration files have two new flags that tell the job whether to include bibliographic records with attached e-tem data.

The first flag is a Yes/No flag to export e-items with the course reserve records.

The second flag is a Yes/No flag to check for suppressed bibliographic records that are linked to active e-items.

Reference to Technical Documentation

Refer to the *Voyager 8.0 Primo Integration User's Guide* for more information.

Performance Improvements in the Voyager Extract

Purpose of Enhancement

This enhancement to the Voyager extract for Primo improves performance of the extract routine.

Description

Exported records are immediately written to a tar file rather than writing each record to a file and bundling the records in tar files in a separate process.

Implementation Notes

No configuration is necessary.

Updates to the Primoexp-*.ini

Purpose of Enhancement

This enhancement simplifies the list of examples of `[Excluded Happening Locations]` provided in the configuration files.

Description

Several examples in `[Excluded Happening Locations]` have been removed and the examples are commented out in the configuration file by default.

Implementation Notes

These changes were made in each of the `Primoexp-*.ini` files.

10

Voyager Analyzer

This section includes the following enhancements:

- Cognos 8.4.1
- RHEL v5.2 and later
- Excel 2007

Cognos 8.4.1

Purpose of Enhancement

The Cognos software has been updated to v8.4.1.

Description

Voyager Analyzer runs on Cognos software, which has been updated to run v8.4.1 and is compatible with Office 2007 and Red Hat Enterprise Linux (v5.2 and later).

Implementation Notes

The Cognos software is upgraded as part of your Voyager Analyzer upgrade.

RHEL v5.2 and Later

Purpose of Enhancement

Voyager Analyzer is supported on the same Linux platform as Voyager.

Description

Voyager and Voyager Analyzer can be run on the same version of RHEL effective with the upgrade to Voyager 8.0.

Reference to Technical Documentation

Refer to the *Operating System Requirements for Red Hat Enterprise Linux* (located in the Cross-Product Information > System Requirements section of the Ex Libris Documentation Center) for more information.

Excel 2007

Purpose of Enhancement

Data from Voyager Analyzer can be exported to files in Excel 2007 format.

Description

Excel 2007 is supported in Cognos 8.4.1. Reports can be exported in Excel 2007 format from the report view display in Voyager Analyzer.

Implementation Notes

Office 2007 or Excel 2007 must also be installed on your workstation.