

Readme File for VRS (Voyager Reporting System)
Version 2008.03

IMPORTANT - MUST READ

*(See the section VRS Features & Reports for highlights on system capabilities.)
(See the section VRS Ver. 2008.03 Additions and Refinements for latest
enhancements – beginning page 3.)*

1. The Oracle ODBC Driver and MS Access must be installed on the PC workstation before VRS will install and operate correctly. Both must be installed on the PC's local hard drive. A network or LAN install for either is insufficient and will cause VRS to fault. For installation instructions, refer to the VRS User's Guide, Appendix A.
2. Version 2006_02 and above is:
 - * supported only on Windows 2000 and XP Operating Systems
 - * compatible only with MS Access 2000, 2002 (XP), and 2003.
 - * compatible only with Oracle ODBC Driver 9i and above.
3. The VRS install procedure includes a set of steps that vary at selected points depending upon whether doing a new install or a VRS upgrade. Pay close attention to and follow the instructions provided in the prompts.
4. If you are upgrading from a previous version, first:
 - insure the Oracle drivers have been upgraded to version 9i.
 - make a backup of the VRS database
(c:\g2\vrs\vrs_database\LocalTables.mdb)
The backup is for precaution only. VRS will migrate your critical tables forward to a new refreshed MDB. If, however, the migration does not run correctly, you can manually accomplish the migration by exporting the following tables from the backup version to the newly installed MDB:
 - LibraryID
 - tblCatCounts (ver. prior 2003.04 did not contain col. 3,
Library_name)
 - tblCircStats
5. MS Excel output can be generated for selected reports provided Excel is readily available to VRS. To be readily available, Excel must be Version 2000 or higher and must be installed on the local workstation.

Install / Upgrade Steps –

*Note: If you are using **MSAccess2007**, make sure the C:\G2\VRS path is set as a trusted location. See “Creating a trusted location in MSAccess 2007” instructions below.*


- a. Download the VRS_20071001.exe to a temp directory on the workstation and run the self-extract program, or insert the VRS Installation CD into a CD drive. Recommended extraction path: *c:\G2\VRS\vrs_install*.
- b. Run VRS_setup.exe, if it does not start automatically. Required install path is: *c:\G2\VRS*.
- c. Follow and respond to the series of prompts in the order given.
- d. Complete the install and do a test run of VRS (*c:\G2\VRS\VRS.exe*).

NOTE:

If you are using **MS Access 2003** or above and receive the MS Access security warning, you may need to install the Jet 4.0 Service Pack or the VRS digital signature. If you are unfamiliar with how to perform either of these standard procedures, as a temporary solution you can continue in Low security mode by performing the following steps in MS Access.

- 1) On the top menu bar, click **Tools > Macro > Security**
- 2) Set on the Low security radio button.
- 3) Click **OK** and continue with VRS.

Creating a trusted location in MSAccess 2007

- 1). Click the **Microsoft Office Button**  , and then click **Access Options**.
- 2). Click **Trust Center**, click **Trust Center Settings**, and then click **Trusted Locations**.
- 3). Click **Add new location**
- 4). In the **Path** box, type the name of the folder that you want to use as a trusted location, or click **Browse** to locate the folder.
- 5) Select the **Subfolders of this location are also trusted** check box.
- 6). Click **OK**.

(See following section for highlights on features and capabilities.)

VRS FEATURES & REPORTS

(most recent additions and enhancements listed first)

VRS Ver. 2008.03 Additions and Refinements

Circulation

- 1) Inventory Control has been refined so call numbers in shelf list displays include enumeration data and are filed within the lists in the order expected to be on the shelf, e.g., vol 1, vol 2,, vol 10, vol 11, etc.
- 2) Excel Output has been limited to 50K rows. Once this limit is reached, the file closes and a new file will be opened and the process will continue.

Cataloging

- 1) Shelf Selection filing order has been refined to support a greater degree of location specificity. While the Temporary Location when recorded in the Item Record is assumed to take precedence in all cases, when not supplied the Permanent Location is used. The Permanent Location, however, can be supplied as one value the MFHD Record and as a different value in the Item Record. This inconsistency can create confusion when selection is done based on Permanent Location. Options are now provided that let the user determine which of these data fields are to be used during runtime location evaluation.
- 2) Excel Output has been limited to 50K rows. Once this limit is reached, the file closes and a new file will be opened and the process will continue.

VRS Ver. 2007.10 Additions and Refinements

Circulation

- 1) Inventory Control is a new feature included in this release. The feature can be used with any handheld scanner so long as the output of the scanner can be presented to the Inventory Control routines as a collection of barcodes in a text file. When a file is presented the routines will map the barcodes against a user specified portion of the collection and will produce any one of seven (7) selectable reports.

Cataloging

- 1) Refined MARC (blob) string searching. The first and second indicator can now be specified for the first tagged field in a search request.

VRS Ver. 2007.03 Additions and Refinements

Acquisitions

- 1) Includes new feature that supports the emailing of the Requestor Notice report to individual patrons who have placed a request for certain items. The implementation involves the setup of the 'Email.ini' file, located in the VRS install directory. The Voyager.ini file must also be setup to include the E-mail stanza. At the conclusion of sending all email notices, the error file 'emailErrFile.txt' is created in the VRS working directory.

Cataloging

- 1) Includes new feature that supports full MARC (blob) string searching on both Bib and Holdings records.
- 2) Blob output can be routed to screen display, to Excel spreadsheet, to printer or to a MARC file placed in a user-defined path/filename. Output is controlled by a new supplemental application known as "*GIL_FileUtility.exe*".
- 3) *GIL_FileUtility.exe* is included in the VRS install package and should install automatically. If install problems occur and manual intervention is required, the executable and its support files must be placed in path `c:\G2\GILFileUtility\`. The required files are:
 - *GIL_FileUtility.exe*
 - *FxdFld_Descript.cvs*
 - *Help_Global.htm*
 - *Help_Global_files* (folder)
- 4) Help screen messages are provided for Blob searching and for the *GIL_FileUtility*. The default web browser Microsoft Internet Explorer is used to display the screens. The default browser can be assigned/reassigned by placing a BROWSERLOCATION definition in the MS Access location stanza found in the VRS control file *FilePath.ini*.

```
C:\G2\VRS\FilePath.ini
[MSACCESS EXE LOCATION]
:
BROWSERLOCATION=C:\Program Files\Internet Explorer\
iexplore.exe
```
- 5) Three new folders are included in the VRS path (`c:\G2\VRS\`). They are:
 - BlobOut – path where MARC files retrieved from the server are stored
 - ExcelOut – default path where Excel spreadsheets are stored.
 - PrtFiles – default path where spooled text files are stored.

VRS Ver. 2006.6 Additions and Refinements since 08/01/2006

Cataloging

- 1) Corrected "Titles with no MFHDs" to be "Titles with no MFHDs" (Form32)
- 2) Corrected problem with incorrect column headers on Class Summary (Form8)
- 3) Included new radio button and report for "Bibs for Supplied ISBNs". A locally Supplied parameter file is required to supply the specified ISBNs.
- 4) Problem with Browse file assignment for Excel output fixed (Form16).
- 5) Reconciled counts between Admin Summary and Collection Counts.

Circulation

- 6) Fixed problem in report "Patrons with Expired Address" that caused patrons with a new e-mail or Temp address to be included when an older address had expired.
- 7) Included CIRC DESK counts in the Circulation Statistics report to reflect activity at the various Circulation desks.

VRS Ver. 2006.06 Additions and Refinements

Acquisitions

- 1) Item Expenditures, corrected grid heading to be Invoice No. instead of Call No.

Cataloging

- 2) Expanded filtering for Bib Level and for Encoding Level. A full range of codes and selection options are now provided for each.
- 3) Start/Stop dates among screens have been re-synchronized.
- 4) "MFHDs with no Call Nos.", landscape display option caused error – fixed.
- 5) "Shelf Selection" grid display showed incorrect Item Status – fixed.

Circulation

- 6) Charges by Pub Year. This new report helps provide insights for any emphasis that should be placed on currency of materials.

Version 2005.2, Version 2005.5 and Version 2005.12 Combined Enhancements:

ACQUISITIONS -

Item Expenditures

CATALOGING –

Collection Selection (Collection Counts)

filtering by location, record format, and Bibs with MFHDs

Tabulations:

Counts within Standardized Groups

Counts for Groups by Location

Titles with Multiple Copies

Growth by Location

Administrative Summary for Fiscal Year

Class Type Counts: title counts by LC, Dewey, GovDoc, etc. A title list for a selected class type can be generated. Location filtering available.

Keyword Selections

Duplicate Titles report

Titles with URLs

Items for Supplied Control Nos.

CIRCULATION –

Charges for Special Selections

Browse Counts by Location

Patrons with Zero Activity

Version 2005.12 – Available Reports

ACQUISITIONS -

Titles on Order

Titles by Line Item Status

Donor List

Requestor List

Requestor Notice

Item Expenditures

Fund Table Summary

Titles by Use Fund

CATALOGING –

Collection Counts (Class Counts)

- standard summary report (pre-profiled) giving totals by major LC divisions only

- standard detail report (pre-profiled) giving totals by call number field-1 (leading alpha portion)
- collection selection report that accepts runtime input (AAAAAnnnn) allowing requestor to specify an array of call number ranges. Additionally, some thirty pre-bulit profiles for named collections are provided (e.g., Performing Arts). Each of these profiles can be selected and used for collection selection counts.
- all three of the reports are based on and allow for:
 - . LC class schedule definitions
 - . distribution within class using runtime options of pubyear, location, language or create year
 - . filters provided for selected locations, bibs with MFHDs only, and for record format (books or serials).
 - . compilation by Titles (Bib_id) or by Location (MFHD_id).
- tabulations use the analysis records extracted by the most recent extraction done by the three listed above (summary, detail, collection selection). Multiple tabulations reports are available:
 - . Counts within Standardized Groups
 - . Title Selections Based on Standardized Groups
 - . Counts for Groups by Location
 - . Titles with Multiple Copies
- growth by location – displays counts for last five years

Catalog Maintenance Statistics

- catalog status counts: row counts for Bibs, MFHDs, Items, Authorities, Serial Composition, Reserve List, Patrons, etc.
- administrative summary for the fiscal year (snapshot counts)
- location summary: list of locations and associated MFHD counts.
- class type counts: title counts by LC, Dewey, GovDoc, etc. A title list for a selected class type can be generated. Location filtering available.
- operator activity: provides by selected operator(s) date-range counts for create, modify, and other maintenance actions performed on Bibs, MHFDs, and Items.

Brief Entry Lists

- New Titles (see Multiple Filing Orders description below)
- Titles by Filters: (see Advanced Selection description below)
- Keyword Selections (counts or list)
- Headings Selections (by heading, subdivision, or both)
- Duplicate Titles
- Bibs with no MFHDs
- MFHDs with no Call Nos
- MHFDs with Multiple Bibs Assigned
- MFHDs with no Items
- Item Activity (charges/browses counts based on Advanced Selection criteria)
- Items Without Barcodes
- Items for Supplied Control Nos.
- Items on Reserve
- Titles or Holdings with URLs
- Shelf Selection (details include item barcode and status)

Advanced Selection for Catalog Entries

Title Selections and Shelf Selections can be qualified and filtered by combinations of:

- Location and/or Call Number
- Medium
- Type of record (Bib)
- Form of Item
- Language
- Operator
- Heading / Subdivision
- Pub Date Range
- Bib-ID Range
- Bib Level
- .. more ..

Multiple Filing Orders for Catalog Entries

- Title

- Author
- Bib-ID
- Location / Call No
- Heading
- MFHD-ID
- Item-ID
- Barcode
- .. more ..

 Print Options

- Portrait
- Landscape
- One-line, two or 3-line list depending upon report and orientation

CIRCULATION –

Statistics

- Circulation Activity (date range counts by location, patron group and item type)
- Charges by LC class (charges within a specified date range mapped against pre-profiled Class codes)
- Charges for Special Selections (charges within a specified date range mapped against most recent Special Selections report (Cataloging > Collections Statistics).
- Reserve List Counts

Lists

- Fine and Fee Payments
- Fine and Fees Outstanding (Nulls)
- Fine and Fees Outstanding
- Fine Fee Transactions (log file)
- Items Charged (Shelf List Order)
- Items & Fines and Fees Outstanding
- Items Frequently Used
- Items Lost (Fine Fee Type 2)
- Items Overdue
- Reserve List and Reserve List Counts

Patron Details

- Patron Information
- Patron Block List
- Patrons with Zero Activity
- Patrons with Multiple Patron Records
- Patrons with Multiple Barcodes for Same Patron Group
- Patrons with Multiple Patron Groups for Same Barcode
- Patrons with SSN in Barcode or in Inst-ID
- Patrons with Expired Address
- Patrons UB Stub

 Circulation Qualifiers

- Patron group(s)
- Date range
- Expire date
- Fine/Fee range
- Days overdue

EXCEL Output

Option to select MS Excel as output source. File name (*.xls) can be assigned prior to output.