



**Voyager[®]
InterCirc[™] - U.1 User's Guide**

July 2011

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About This Document

Purpose

This document provides the following.

- A description of Voyager InterCirc™ - U.1.
- Instructions for customizing Voyager InterCirc - U.1 to meet your requirements.

Intended Audience

This document is intended for Voyager® customers who have a requirement to do the following.

- Loan Voyager database items to non-Voyager (consortium) patrons
- Circulate items to local Voyager patrons using Universal Resource Sharing Application (URSA)™, a product of Dynix.

This document is written for a technical audience responsible for the following.

- Setup of configuration parameters for circulation of Voyager items to non-Voyager (consortium) patrons using URSA
- Setup of configuration parameters for circulation of URSA items to local Voyager patrons
- Review/analysis of message logs as needed

Reason for Reissue

This manual incorporates and is being issued for the following reasons.

- Updated the Ex Libris information throughout the guide
- Updated the guide formatting
- Updated the [Document Reproduction/Photocopying](#) and [Comment on This Document](#) sections

How to Use This Document

This document consists of the following.

- | | |
|---------------------------|---|
| Chapter 1 | “Getting Started”
Chapter 1 provides information about prerequisite skills and/or knowledge required for working with Voyager InterCirc - U.1 and a brief overview of preparatory tasks. |
| Chapter 2 | “Configuring and Running Voyager InterCirc - U.1”
Chapter 2 provides information about configuring and running Voyager InterCirc - U.1. |
| Chapter 3 | “Voyager Modules Setup Considerations”
Chapter 3 provides information about customizing Voyager modules. |
| Chapter 4 | “Messages”
Chapter 4 provides information about diagnostic error messages. |
| Index | The Index is an alphabetical, detailed cross-reference of topics. |

Conventions Used in This Document

The following conventions are used throughout this document:

- Names of commands, variables, stanzas, files, and paths (such as `/dev/tmp`), as well as selectors and typed user input, are displayed in `constant width` type.
- Commands or other keyboard input that must be typed exactly as presented are displayed in **`constant width bold`** type.
- Commands or other keyboard input that must be supplied by the user are displayed in ***`constant width bold italic`*** type.
- System-generated responses such as error messages are displayed in `constant width` type.

- Variable *portions* of system-generated responses are displayed in *constant width italic* type.
- Keyboard commands (such as **Ctrl** and **Enter**) are displayed in **bold**.
- Required keyboard input such as “Enter **vi**” is displayed in **constant width bold** type.
- Place holders for variable portions of user-defined input such as **ls -l filename** are displayed in *italicized constant width bold* type.
- The names of menus or status display pages and required selections from menus or status display pages such as “From the **Applications** drop-down menu, select **System-wide**,” are displayed in **bold** type.
- Object names on a window’s interface, such as the **Description** field, the **OK** button, and the **Metadata** tab, are displayed in **bold** type.
- The titles of documents such as *ENCompass Web Client User’s Guide* are displayed in *italic* type.
- Caution, and important notices are displayed with a distinctive label such as the following:

NOTE:

Extra information pertinent to the topic.

**IMPORTANT:**

Information you should consider before making a decision or configuration.

**CAUTION:**

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

**TIP:**

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

RECOMMENDED:

Preferred course of action.

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Getting Started

1

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Introduction

Voyager InterCirc - U.1 provides the following capabilities.

- Circulation of URSA items to local Voyager patrons
- Circulation of local Voyager items to URSA patrons

This chapter describes considerations and preparations for customizing and using Voyager InterCirc - U.1.

Purpose of this Chapter

This chapter's purpose is to provide information about prerequisite skills and/or knowledge required for working with Voyager InterCirc - U.1 and a brief overview of preparatory tasks.

Prerequisite Skills and Knowledge

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

- Microsoft® interface navigation.
- UNIX® commands and navigation for working with a variety of files to tailor the configuration files to match your requirements.

- Basic knowledge of your Voyager System Administration setup and the URSA environment as it relates to processing circulation transactions.

Before You Begin

The installation of Voyager InterCirc - U.1 assumes that you have the following installed.

- Voyager (the base product)
- Java Runtime Environment
- Oracle JDBC
- Universal Resource Sharing Application (URSA) by Dynix
- Tomcat
- Voyager Z39.50

More information about components and configuration details are provided in the chapter entitled [Configuring and Running Voyager InterCirc - U.1](#) on [page 2-1](#).

Checklist

In preparation for customizing and using Voyager InterCirc - U.1, identify the following elements needed to customize the configuration file.

- Agency identifiers (prescribed by the consortium)
 - NCIP Agency ID for the URSA (Dynix) server site.
 - NCIP Agency ID for your local (Voyager) site.
 - NCIP Agency ID scheme(s) in which those IDs are registered.
- Local (Voyager) configuration considerations
 - Operator ID to be used to record URSA transactions in Voyager.
 - Type of patron validation required by your site (barcode, social security number, or institution ID).
 - Item type to be used for remote items borrowed by local (Voyager system) patrons.
 - Location where remote items are held locally (Voyager site).
 - Location where remote items may be picked up by local patrons.
 - Special system patron to be charged by Voyager Circulation with all local items lent to remote patrons.

- Patron group and circulation policy with unlimited privileges for the special system patron.
- Location where local items are charged to special system patron on behalf of the remote patron.
- Location from which local items are mailed to remote libraries.
- Common circulation policies
- Expected time in days it takes for a local item to be returned from the remote library.
- Call Slip configuration that can be used to retrieve items requested by remote libraries. See [Voyager System Administration Setup](#) on [page 3-1](#) and [Call Slip Considerations](#) on [page 3-2](#) for more information.

Configuring and Running Voyager InterCirc - U.1

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Configuring and Running Voyager InterCirc - U.1

2

Introduction

The Voyager system has the flexibility to circulate items with other non-Voyager systems. Voyager InterCirc - U.1 is one option that demonstrates this flexibility.

Purpose of this Chapter

The purpose of this chapter is to describe the following.

- The basic components of Voyager InterCirc - U.1
- How to configure the `URSA.ini` file

Components

The primary components in a Voyager InterCirc - U.1 installation are the following.

- URSA (Universal Resource Sharing Application).
The software by Dynix that interacts with the local (Voyager) database by acting as a client to the Voyager InterCirc - U.1 bridge and to the Z39.50 server. This is usually run at a site remote to the Voyager site and managed by a consortium.
- Voyager InterCirc - U.1.

The software that directly interfaces with your local (Voyager) database and services NCIP (National Circulation Interchange Protocol) messages that are initiated by URSA. This is the software that runs at your local site and is described in this document.

- Z39.50 Server.

The standard Voyager Z39.50 server needs to be installed and running at your local site in order for URSA to search for bibliographic records. See the *Voyager System Administration User's Guide* for more information about Z39.50.

Voyager InterCirc - U.1 Configuration File

One of the main components of Voyager InterCirc - U.1 is the configuration file, `URSA.ini`, that is located in `/ml/ ... /xxxdb/ini/`. See [Figure 2-1](#).

Line#	
1	## Configuration for URSA
2	
3	[General]
4	OperatorId=URSA-NCIP
5	ServicesURL=http://localhost:8080/ews/services/
6	TypeOfVerificationId=PatronBarcode
7	VACS OPAC connection=xxxdbOPAC
8	VACS CIRC connection=xxxdbCIRC
9	
10	[LocalSite]
11	AgencyId=VOYAGER
12	AgencyIdScheme=http://www.dynix.com/ncip/schemes/ agency.scm
13	
14	[URSASite]
15	AgencyId=URSA

Figure 2-1. URSA.ini

```
Line#
16 AgencyIdScheme=http://www.dynix.com/ncip/schemes/
    agency.scm
17
18 [Borrowing]
19 UrsaItemTypeCode=URSAitem
20 ItemLocationCode=URSAloc
21 PickupLocationCode=CIRC
22
23 [Lending]
24 UrsaPatronBarcode=URSA-REMOTE-BORROWER
25 ChargeLocationCode=CIRC
26 PickupLocationCode=CIRC
27 ReturnTransitPeriod=1
28
29 ## Configuration for NCIP
30
31 [NCIP]
32 VersionSupported=1.0
33 DisableSchemeChecking=Y
34
35 ##### internal use only #####
36
37 [xxxdb OPAC]
38 # configuration for a Voyager OPAC connection
39 HostName=localhost
40 PortNum=7000
41 ServerAppCode=OPAC
42
43 [xxxdb CIRC]
44 # configuration for a Voyager CIRCSVR connection
45 HostName=localhost
46 PortNum=7030
```

Figure 2-1. URSA.ini (Continued)

```

Line#
47  ServerAppCode=CIRC
48
49  ##
50  ##-----
51  ## DO NOT MAKE CHANGES BELOW THIS LINE
52  ## UNLESS YOU'RE SURE YOU KNOW WHAT YOU'RE DOING
53  ##-----
54  ##
55
56  [NCIP Services]
57  AcceptItem=com.endinfosys.voyager.custom.ncip.AcceptItemMsgTransaction
58  CancelRequestItem=com.endinfosys.voyager.custom.ncip.CancelRequestItemMsgTransaction
59  CheckoutItem=com.endinfosys.voyager.custom.ncip.CheckoutItemMsgTransaction
60  LookupItem=com.endinfosys.voyager.custom.ncip.LookupItemMsgTransaction
61  LookupUser=com.endinfosys.voyager.custom.ncip.LookupUserMsgTransaction
62  LookupVersion=com.endinfosys.voyager.custom.ncip.LookupVersionMsgTransaction
63  RenewItem=com.endinfosys.voyager.custom.ncip.RenewItemMsgTransaction
64  RequestItem=com.endinfosys.voyager.custom.ncip.RequestItemMsgTransaction

```

Figure 2-1. URSA.ini (Continued)

The `URSA.ini` configuration file defines a number of components in the Voyager InterCirc - U.1 environment to include some of the following elements.

- Name and ID of the URSA server.
- Temporary record creation information for URSA items being borrowed by Voyager local patrons. This includes the following.

Patron identification method such as barcode, social security number, or institution ID number.

Item type code assigned to the URSA item being borrowed.

Item location code assigned to the URSA item being borrowed.

Pickup location code assigned to the URSA item being borrowed.

- Identification of the Voyager patron used for lending items to URSA libraries/patrons.
- Charge location code and pickup location code for items being sent to URSA libraries/patrons.
- Estimate of in-transit time frame (in days) for returning an item from an URSA location to the Voyager library that owns the item.
- Identification of the version of Voyager InterCirc - U.1 that is supported.

Configuration of Voyager for the URSA environment assumes a single cluster Voyager system.



IMPORTANT:

Multiple-cluster configurations are not supported.

Stanza Definitions for URSA.ini

This section defines the stanzas in the `URSA.ini` file that need to be tailored for Voyager InterCirc - U.1.

The following is a list of the stanzas in the `URSA.ini` file that need to be customized.

- [General]
- [LocalSite]
- [URSA Site]
- [Borrowing]
- [Lending]
- [NCIP]
- [xxxxdb OPAC]
- [xxxxdb CIRC]

[General]

The [General] stanza contains the following parameters.

- OperatorId
- ServicesURL

- TypeOfVerificationId
- VACS OPAC connection
- VACS CIRC connection

See [Table 2-1](#) for a description of these parameters.

Table 2-1. [General] Stanza Parameter Definitions

Parameter	Definition	Required?
OperatorId	<p>Specify the operator ID that is set up in Voyager System Administration for this application.</p> <p>This operator ID is used to conduct URSA transactions in the Voyager database.</p> <p>The default value is <i>URSA-NCIP</i>.</p> <p>This must be a valid operator ID with the privileges to do the following.</p> <p>Cataloging Module:</p> <ul style="list-style-type: none"> • Add bibliographic records • Add holding records • Attach holdings to any bibliographic record • Add item records • Available location includes the one defined in the [Borrowing] stanza ItemLocationCode <p>Circulation Module:</p> <ul style="list-style-type: none"> • Place and cancel hold and recall requests • Add/Update item records • Charge, discharge, and renew items • Available locations include all defined in the URSA.ini file 	Required
ServicesURL	<p>Specify the address for URL services.</p> <p> IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i></p>	Required

Table 2-1. [General] Stanza Parameter Definitions

Parameter	Definition	Required?
TypeOfVerificationId	<p>Specify method for identifying patrons.</p> <p>Options include the following:</p> <ul style="list-style-type: none"> • SSN (social security number) • PatronBarcode • IID (institution ID) <p>The default value is PatronBarcode.</p> <p>This option affects how Voyager processes LookUpUser messages.</p> <p>NOTE: The method selected should match the method used for patron identification in the OPAC.</p>	Required
VACS OPAC connection	<p>Specify your database name followed by OPAC.</p> <p>This points to the [xxxxdb OPAC] stanza.</p> <p>! IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i></p>	Required
VACS CIRC connection	<p>Specify your database name followed by CIRC.</p> <p>This points to the [xxxxdb CIRC] stanza.</p> <p>! IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i></p>	Required

[LocalSite]

The [LocalSite] stanza contains the following parameters.

- AgencyId
- AgencyIdScheme

NOTE:

If your installation requires a unique server identifier for a multiple-server environment, submit an eService request for assistance.

See [Table 2-2](#) for a description of these parameters.

Table 2-2. [LocalSite] Stanza Parameter Definitions

Parameter	Definition	Required?
AgencyId	Specify a unique identifier by which your local Voyager site is known to the URSA server. This corresponds to the NCIP <code>InitiationHeader.ToAgencyId.UniqueAgencyId.Value</code> data element that is provided to Voyager by the URSA server and the <code>ResponseHeader.FromAgencyId.UniqueAgencyId.Value</code> data element that is provided to the URSA server by Voyager.	Required
AgencyIdScheme	Specify the URI that contains a list of agency IDs (list of libraries) for the consortium. This corresponds to the NCIP <code>InitiationHeader.ToAgencyId.UniqueAgencyId.Scheme</code> data element that is provided to Voyager by the URSA server and the <code>ResponseHeader.FromAgencyId.UniqueAgencyId.Scheme</code> data element that is provided to the URSA server by Voyager.	Required

NOTE:

The `.scm` file naming convention as used in [Figure 2-1](#) indicates an NCIP scheme file.

[URSASite]

The `[URSASite]` stanza contains the following parameters.

- AgencyId
- AgencyIdScheme

NOTE:

If your installation requires a unique system identifier for a multiple-server environment, submit an eService request for assistance.

See [Table 2-3](#) for a description of these parameters.

Table 2-3. [URSA Site] Stanza Parameter Definitions

Parameter	Definition	Required?
AgencyId	Specify a unique identifier for the remote site running the URSA server. This corresponds to the NCIP <code>ResponseHeader.ToAgencyId.UniqueAgencyId.Value</code> data element.	Required
AgencyIdScheme	Specify the URI that contains the list of agency IDs (list of servers) for the consortium. This corresponds to the NCIP <code>ResponseHeader.FromAgencyId.UniqueAgencyId.Scheme</code> data element.	Required

NOTE:

The `.scm` file naming convention as used in [Figure 2-1](#) indicates an NCIP scheme file.

[Borrowing]

Information supplied by the parameters in the `[Borrowing]` stanza is used to create temporary item records for Voyager circulation purposes when a Voyager patron borrows an item from an URSA library.

The `[Borrowing]` stanza contains the following parameters.

- `UrsaltemTypeCode`
- `ItemLocationCode`
- `PickupLocationCode`

See [Table 2-4](#) for a description of these parameters.

Table 2-4. [Borrowing] Stanza Parameter Definitions

Parameter	Definition	Required?
UrsaltemTypeCode	<p>Specify the item type for URSA consortium items.</p> <p>This item type code may represent an existing item type or a newly created item type that is used exclusively with URSA.</p> <p>Creating a new item type code for these items makes it easier to keep track of them.</p> <p>See Temporary Records on page 3-6 for reasons to consider the use of a new item type.</p> <p>Voyager does not verify that this code corresponds to an item type defined in the ITEM_TYPE table.</p> <p>The <code>UrsaItemTypeCode</code> variable could be <i>book</i> or <i>foreign item</i> for example.</p>	Required
ItemLocationCode	<p>Specify the item location of temporary bibliographic/holdings/items that represent consortium-owned items.</p> <p>This value must be identical to a value from LOCATION.location_code.</p> <p>This location code may represent an existing location or a newly created location that is used exclusively with URSA.</p>	Required
PickupLocationCode	<p>Specify the location at the local library to which URSA items are sent for local patrons.</p> <p>This must be a valid LOCATION.location_code value.</p>	Required

[Lending]

Information supplied by the parameters in the [Lending] stanza is used to provide alias Voyager patron information for an URSA library/patron in order to lend an item to the URSA library/patron. This stanza also provides location information needed by Voyager for the lending process and identifies an in-transit time frame for estimating the return time frame of items.

The [Lending] stanza contains the following parameters.

- UrsaPatronBarcode
- ChargeLocationCode
- PickupLocationCode
- ReturnTransitPeriod

See [Table 2-5](#) for a description of these parameters.

Table 2-5. [Lending] Stanza Parameter Definitions

Parameter	Definition	Required?
UrsaPatronBarcode	<p>Specify the unique barcode associated with the Voyager system patron created for the purpose of lending Voyager local items to an URSA patron.</p> <p>The Voyager system patron is held responsible within the Voyager system for all requests and charges made by URSA on behalf of patrons at other libraries. For this reason, the Voyager system patron needs to have unlimited requesting and borrowing privileges and a separate patron group should be defined for this patron.</p> <p>NOTE: Dynix may recommend that you create more than one Voyager system patron. However, this is not necessary in Voyager. If you decide to create multiple Voyager system patrons, give them distinct barcodes and place only one in the <code>URSA.ini</code> file at a time.</p>	Required
ChargeLocationCode	Specify the location code used to identify a circulation desk for use in charging Voyager local items to an URSA patron.	Required

Table 2-5. [Lending] Stanza Parameter Definitions

Parameter	Definition	Required?
PickupLocationCode	<p>Specify the location within the Voyager local library that has responsibility for handling the distribution (mailing) of Voyager items to the requesting URSA patrons/libraries.</p> <p>This location is printed on Call Slip requests.</p> <p>The PickupLocationCode value must be identical to a value from LOCATION.location_code.</p>	Required
ReturnTransitPeriod	<p>Specify the anticipated time (in days) that it takes an item to be returned to the Voyager local library from the URSA consortium library.</p> <p>This number is used in combination with due date information to determine the return time frame of an item.</p>	Required

[NCIP]

The [NCIP] stanza contains the following parameters.

- VersionSupported
- DisableSchemeChecking

See [Table 2-6](#) for a description of these parameters.

Table 2-6. [NCIP] Stanza Parameter Definition

Parameter	Definition	Required?
VersionSupported	<p>Specify the version of Voyager InterCirc -URSA installed on the server.</p> <p>This parameter provides for the option of version checking with future releases.</p> <p> IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i></p>	Required

Table 2-6. [NCIP] Stanza Parameter Definition

Parameter	Definition	Required?
DisableSchemeChecking	Specify yes (Y) or no (N) for this option. The Y option is required for interaction with the current Dynix URSA server.  IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i>	Required

[xxxxdb OPAC]

The [xxxxdb OPAC] stanza contains the following parameters.

- HostName
- PortNum
- ServerAppCode

See [Table 2-7](#) for a description of these parameters.

Table 2-7. [xxxxdb OPAC] Stanza Parameter Definition

Parameter	Definition	Required?
HostName	Specify the host name.  IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i>	Required
PortNum	Specify the port number.  IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i>	Required
ServerAppCode	Specify the server application code.  IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i>	Required

[xxxxdb CIRC]

The [xxxxdb CIRC] stanza contains the following parameters.

- HostName
- PortNum
- ServerAppCode

See [Table 2-8](#) for a description of these parameters.

Table 2-8. [xxxxdb CIRC] Stanza Parameter Definition

Parameter	Definition	Required?
HostName	Specify the host name.  IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i>	Required
PortNum	Specify the port number.  IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i>	Required
ServerAppCode	Specify the server application code.  IMPORTANT: <i>This parameter is configured at installation. Do not change it.</i>	Required

Tomcat Configuration Considerations

The following Tomcat files are configured at installation.

- server.xml
- log4j.properties
- web.xml
- server-config.wsdd
- jk2.properties

Voyager Modules Setup Considerations

3

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Voyager Modules Setup Considerations

3

Introduction

This chapter describes setup steps and considerations for Voyager modules in a Voyager InterCirc - U.1 environment.

Voyager System Administration Setup

The following setup activities need to be completed in the Voyager System Administration module.

- Create a Circulation - Policy Definition for Voyager InterCirc - U.1 use only.
- Create a Call Slip queue for Voyager InterCirc - U.1 use.

(See [Call Slip Considerations](#) on [page 3-2](#) for more information regarding the need for Voyager Call Slip in processing Voyager InterCirc - U.1 requests.)

Select one of the following Processing Codes found on the **Values** tab in **Call Slips>Queues** for each queue set up to receive loan requests from URSA.

- Place "On Hold" shelf
- "In Transit for Hold" to destination location



IMPORTANT:

*Do not select the **Autocharge to requesting patron** option. If this option is selected, Voyager reports incorrectly to URSA that the item cannot be charged to the patron at a later point in the workflow.*

Call Slip Considerations

The purpose of this section is to discuss the optional need for using Voyager Call Slip in a Voyager InterCirc - U.1 environment.

The dependency on Voyager Call Slip is determined by the URSA server setting for mediated mode or unmediated mode. See [Table 3-1](#) for a description of these two modes as they relate to the need for Voyager Call Slip.

Table 3-1. Mediated versus Unmediated Mode Relating to Call Slip

Mode	Call Slip Implications
Mediated	<p>This URSA server setting indicates that the URSA system displays a pick list at the item's holding library which can be used by the librarian to pull the item from the shelf.</p> <p>Voyager Call Slip is not need when this URSA server option is selected.</p>
Unmediated	<p>This URSA server setting indicates that the URSA system places a request in the holding library's circulation system by sending a RequestItem message.</p> <p>The holding library's circulation system is responsible for displaying the pick list so that the requested item can be retrieved from the shelf.</p> <p>With Voyager, the Call Slip module is used to implement the pick list function.</p> <p>Therefore, Voyager Call Slip is needed when this URSA server option is selected.</p>

Voyager Circulation Setup

The following setup activities need to be completed in the Voyager Circulation module.

Create a patron that is only used for lending items to URSA libraries/patrons.

- This patron should have unlimited privileges.

- Depending on your local circulation policies, it may be necessary to set up a special patron group or circulation policy group to insure that this patron is never blocked from requesting or charging items.

Borrowing/Lending Considerations

Voyager InterCirc - U.1 provides the capability to have circulation activities, borrowing and lending, performed on items owned by libraries within a consortium mix of Voyager- and URSA-based systems.

Borrowing Considerations

For borrowing, the following needs to be enabled.

- Item type code for borrowed items
This code matches the `UrsaItemTypeCode` value provided in the [Borrowing] stanza of `ursa.ini`.
- Item type location for temporary bibliographic, holdings, and item records
This code matches the `ItemLocationCode` value provided in the [Borrowing] stanza of `ursa.ini`.
This can help circulation staff identify consortium-owned (URSA institution) items by printing routing slips containing the URSA location at the time items are discharged.
- Pickup location code at which items requested by local (Voyager) patrons are held
This code matches the `PickupLocationCode` value provided in the [Borrowing] stanza of `ursa.ini`.

For more information about the borrowing process, see [Summary for Borrowing](#) on [page 3-4](#).

Lending Considerations

For lending activities, the following needs to be enabled.

- Patron barcode
One patron record must be created that represents consortium (URSA) patrons. All loaned items are checked out to this patron. The unique barcode for this patron must match the information provided in the [General] stanza of `ursa.ini`.
- Location code for circulation desk used to charge items

- Pickup location code to which requested items are to be delivered
- Return transit period

The expected number of days that it takes for an item to be returned from a consortium (URSA) library to the local (Voyager) library.

For more information about the lending process, see [Summary for Lending](#) on [page 3-5](#).

Borrowing/Lending Process of Events

In setting up the Voyager system and Voyager InterCirc - U.1, use the following summaries describing the events and the environment for processing borrowing and lending requests to assist with planning your system customization.

Summary for Borrowing

The following steps highlight the process for a local (Voyager) patron to borrow an item owned by another URSA institution.

- A local patron logs on to the Dynix web-based system and enters a patron barcode.
- After receiving the patron barcode from the URSA server via an NCIP LookupUser request, Voyager checks for blocks and authenticates the patron.
- Local patron searches for an item through Dynix's web-based application which queries bibliographic databases using the Z39.50 protocol.
- A local patron requests an item.
- The URSA server requests the item from a lending library.
- The consortium lending library ships the item to the patron's local (Voyager) library.
- The circulation clerk uses Dynix's web-based application to notify the URSA server that the item has arrived.
- The URSA server notifies Voyager that the item has arrived via an NCIP AcceptItem request.
- Voyager creates temporary bibliographic holdings, item records, and an item barcode for the item.
- Voyager places a hold on the item for the patron.
- When the patron picks up the item, the circulation clerk charges the item through Voyager.

- The patron returns the item.
- The circulation desk uses Dynix's web-based application to notify the URSA server that the transaction is complete.
- The circulation clerk discharges the item in Voyager.
- The circulation clerk deletes the temporary bibliographic, holdings, and item record in Voyager. See [Temporary Records](#) on [page 3-6](#) for more information.
- The circulation clerk ships the item back to the lending library.

Summary for Lending

The following steps highlight the process for lending a local Voyager item to another library in the consortium utilizing the URSA server.

- The URSA server identifies an item in the Voyager database using a Z39.50 search.
- When the URSA server is set for unmediated mode (see [Table 3-1](#) on [page 3-2](#)), the following happens.
 - The URSA server notifies Voyager that an item has been requested via an NCIP RequestItem request.
 - Voyager places a call slip request for the item.
 - The call slip clerk fills the request.

NOTE:

When the URSA server is set for mediated mode, the call slip clerk uses the URSA web client to view the pick list and fill the request.

- The circulation clerk at the shipping location discharges the item to clear the In-Transit status and subsequently ships the item and uses Dynix's web-based application to notify the URSA server that the request has been filled.
- After receiving an NCIP CheckOutItem request from the URSA server indicating that the item needs to be charged, Voyager charges the item to the patron whose barcode is provided in the configuration file.
- When the item is returned, the circulation clerk uses Dynix's web-based application to notify the URSA server that the item has been returned.
- The URSA server sends an NCIP CheckInItem request to the Voyager system to discharge the item in Voyager.

Temporary Records

When a local (Voyager) patron borrows an item from a consortium lending library, the URSA server sends an AcceptItem request to Voyager InterCirc - U.1 that initiates transactions to create bibliographic, holdings, and item records on the Voyager system in order for the item to be charged to the Voyager patron.

When the patron returns the item, these temporary records are no longer needed on the Voyager system. The current URSA server implementation does not send a DeleteItem request to Voyager. As a result, there is no automatic way to delete the temporary item records.

There is no harm in leaving the item records in the database except for the fact that they are no longer needed.

If you decide to implement a process to delete these temporary records, one possible option is to define a new item type for the `UrsaltemTypeCode` in the `URSA.ini` file. Temporary item records would be associated with this unique item type. This would allow you to periodically scan your database for items of this unique item type that have an item status of Not Charged and delete those items with their associated bibliographic and holdings records.

Messages

4

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URSA.log File Messages

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Contents

URSA.log File Messages

Voyager InterCirc - U.1 creates the `ursa.log` message log located in `/ml/voyager/xxxxdb/log/ews.log`. The `ursa.log` file contains entries resulting from the Voyager/URSA message exchange. See [Table 4-1](#) and [Table 4-2](#).

[Table 4-1](#) provides a list of error messages associated with `URSA.ini` that you may find in the `ursa.log` file. These messages display when an error in the configuration occurs.

Table 4-1. Error Messages Associated with URSA.ini

URSA.ini Parameter	Error Message
OperatorId	An error has been encountered in the configuration file. The <code>OperatorId</code> key is missing from the <code>[General]</code> stanza of the configuration file.
AgencyId [LocalSite]	An error has been encountered in the configuration file. The <code>AgencyId</code> key is missing from the <code>[LocalSite]</code> stanza of the configuration file.
AgencyIdScheme [LocalSite]	An error has been encountered in the configuration file. The <code>AgencyIdScheme</code> key is missing from the <code>[LocalSite]</code> stanza of the configuration file.
AgencyId [UrsaSite]	An error has been encountered in the configuration file. The <code>AgencyId</code> key is missing from the <code>[UrsaSite]</code> stanza of the configuration file.

Table 4-1. Error Messages Associated with URSA.ini

URSA.ini Parameter	Error Message
AgencyIdScheme [UrsaSite]	An error has been encountered in the configuration file. The AgencyIdScheme key is missing from the [UrsaSite] stanza of the configuration file.
UrsaItemTypeCode	An error has been encountered in the configuration file. The UrsaItemTypeCode key is missing from the [Borrowing] stanza of the configuration file.
ItemLocationCode	An error has been encountered in the configuration file. The ItemLocationCode key is missing from the [Borrowing] stanza of the configuration file. The cataloging policy is not properly configured for the item location represented by ItemLocationCode key in the [Borrowing] stanza of the configuration file.
PickupLocationCode	An error has been encountered in the configuration file. The PickupLocationCode key is missing from the [Borrowing] stanza of the configuration file. An error has been encountered in the configuration file. The PickupLocationCode key in the [Borrowing] stanza of the configuration file does not represent a valid location. An error has been encountered in the configuration file. The PickupLocationCode key in the [Borrowing] stanza of the configuration file must represent a location that is also a circulation desk.
UrsaPatronBarcode	An error has been encountered in the configuration file. The UrsaPatronBarcode key is missing from the [Lending] stanza of the configuration file. An error has been encountered in the configuration file. The UrsaPatronBarcode key in the [Lending] stanza of the configuration file must represent an active barcode.

Table 4-1. Error Messages Associated with URSA.ini

URSA.ini Parameter	Error Message
ChargeLocationCode	<p>An error has been encountered in the configuration file. The ChargeLocationCode key is missing from the [Lending] stanza of the configuration file.</p> <p>An error has been encountered in the configuration file. The ChargeLocationCode key in the [Lending] stanza of the configuration file does not represent a valid location.</p> <p>An error has been encountered in the configuration file. The ChargeLocationCode key in the [Lending] stanza of the configuration file must represent a location that is also a circulation desk.</p>
PickupLocationCode	<p>An error has been encountered in the configuration file. The PickupLocationCode key is missing from the [Lending] stanza of the configuration file.</p> <p>An error has been encountered in the configuration file. The PickupLocationCode key in the [Lending] stanza of the configuration file does not represent a valid location.</p> <p>An error has been encountered in the configuration file. The PickupLocationCode key in the [Lending] stanza of the configuration file must represent a location that is also a circulation desk.</p>
ReturnTransitPeriod	<p>An error has been encountered in the configuration file. The ReturnTransitPeriod key is missing from the [Lending] stanza of the configuration file.</p>

[Table 4-2](#) provides a list of informational messages describing the status of the exchange of requests between systems.

Table 4-2. Informational Messages

Message	Description
INFO [requestname] request received.	<p>Normal operation.</p> <p>Signifies request received.</p> <p>Examples of [requestname] are as follows.</p> <ul style="list-style-type: none"> • CheckOutItem • AcceptItem

Table 4-2. Informational Messages

Message	Description
ERROR [message]	<p>Error. (Voyager error information.)</p> <p>Signifies request failed and tells something about why it failed.</p> <p>Example:</p> <p>ERROR Failed to get itemId for itemBarCode: 17602</p> <p>This example indicates that it failed to get the item for Item Barcode 17602.</p>
ERROR [message] [location] [value]	<p>Error Recovery.</p> <p>Shows how request failure is reported back to the URSA server.</p> <p>Example:</p> <p>ERROR Responding with NCIP problem report: Unknown Item at NCIPMessage.CheckOutItem. UniqueItemId.ItemIdentifierValue, value=17602</p> <p>In this example,</p> <p>[message] = Unknown Item</p> <p>[location] = NCIPMessage.CheckOutItem. UniqueItemId.ItemIdentifierValue</p> <p>[value] = 17602</p>
INFO [responsename] message sent.	<p>Normal operation.</p> <p>Signifies response sent.</p> <p>Examples of [responsename] are as follows.</p> <ul style="list-style-type: none"> • CheckoutItemResponse • AcceptItemResponse

Table 4-2. Informational Messages

Message	Description
FATAL NCIP Responder Failed.	<p data-bbox="927 359 1084 384">Serious error.</p> <p data-bbox="927 405 1398 495">Signifies that Voyager InterCirc-U.1 was not able to send a response to URSA server.</p> <p data-bbox="927 516 1419 575">Unable to send even an ERROR response to URSA server.</p> <p data-bbox="927 596 1398 655">This message is followed by additional situation-specific diagnostic information.</p>

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