Introduction

Content summary

The primary focus of this release has been on:

- **VDX:**
  - Integration with Article Exchange
- **Navigator:**
  - Circ Gateway support for Alma, Polaris, Voyager NCIP interops. Minor Patron UI bug fixes

New Developments included in this release

<table>
<thead>
<tr>
<th>ISSUE #</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Navigator Developments</strong></td>
<td></td>
</tr>
<tr>
<td>DELSE-1409</td>
<td>Circ Interops with Alma systems</td>
</tr>
<tr>
<td>DELSE-1222</td>
<td>Circ Interops with Polaris systems</td>
</tr>
<tr>
<td><strong>VDX Developments</strong></td>
<td></td>
</tr>
<tr>
<td>VDX-11850</td>
<td>Integration with OCLC’s Article Exchange document delivery service</td>
</tr>
</tbody>
</table>

New Features introduced in this release

https://help.oclc.org/Resource_Sharing/VDX/VDX_release_notes_and_known_issues/2013_VDX_release_notes/0...
DELSE-1409: Circ Integration with Ex Libris Alma systems

Navigator can now interoperate with Ex Libris’ Alma systems using NCIP-2 via the OCLC Circulation Gateway.

DELSE-1222: Circ Integration with Polaris systems

VDX and Navigator can now interoperate with Polaris systems using NCIP-1, either through the Circulation Gateway or directly from VDX.

VDX-11850: Integration with OCLC’s “Article Exchange” service

Overview

OCLC has introduced a new global document delivery system called Article Exchange (or “AE” for short).

AE works by allowing lenders to upload electronic document files into a central document store. The lender then fills out an email that is sent to the requesting patron (or library). The email includes a “tiny URL” and a uniquely-generated password that can be used by the email’s recipient to retrieve the document. AE includes pre-configured rules for how long the document remains active, how many times it can be accessed etc.

Article Exchange includes a callable API available through OCLC’s WorldShare platform services which permits software systems to both store documents and retrieve them from “The Cloud”.

Our intention is to integrate Article Exchange into VDX’s electronic document delivery workflows by making use of the AE Upload and AE Download web services. When integrated in this manner, the lender can send a Shipped message to the borrower which includes the Access URL and Password. The receiving system can then use the Access URL and Password to retrieve the document from AE and make it available to the patron in the same way as any other VDX-supplied electronic documents.

In order to use the AE Upload service, VDX will need to have an appropriate WorldCat Autho & Password for the lending library, and an OCLC-provided WSKEY to validate the web service transactions.

In order to use the AE Download service, VDX will use the Access URL and Password returned by the AE Upload Service, and the OCLC-provided WSKEY to validate the web service transaction.

Borrower Configuration

If the VDX system uses a local VDX document store then

- Setup the system’s WSKEY and “Secret” for AE access
- Set up the AE service base URL
- Configure the background AE download driver process

1. Setup the WSKEY, WSKEY “Secret” and base URL for AE access
2. Link the Article Exchange config to the global Document Delivery system settings in VDX System Globals

![Article Exchange Config](image)

3. Configure and enable the background “Article Exchange Listener” process

**User Alerting Defaults**

- No Alert Log
- Alert Default
- Alert Addr Has Priority

**Document Delivery Settings**

- Default Document Location: database://wvov:wvov@vdxov
- Max Doc Transmit Retry: 5
- Delete Doc days: 1
- DocFetch Config: Suzanne’s docfetch config
- Article Exchange Config: OCLC Article Exchange Sandbox
- Enable Tiff->PDF Security: Yes
- Net Client Settings: Buffy test

**Locations on the fly**
If the Borrower’s system does not have an active Document Store

No additional configuration is needed.

The library may want to customize their Received action User Alert so that, if the delivery method is “Article Exchange”, the Alert can include the Shipped Note which specifies the Article Exchange Access URL and Password for this document so that the patron can retrieve it from Article Exchange for themselves.

Note: This type of User Alert should only be implemented if the appropriate copyright laws permit it.

Lender Configuration

- Set up the lending library’s WC authorization and password in their Location record
- Set up the system’s WSKEY and “Secret” for AE access.
- Set up the AE service base URL
- Configure and enable the Document Sender background process:

1. Set up the lending library’s WC authorization and password via their Location record
2. Set up the system’s WSKEY, WSKEY “Secret” and base URL for AE access

This is the same as for Borrower setup. The info only needs to be entered once per VDX system.

3. Configure and enable the Document Sender background program:

This is the standard VDX “Document Sender” program, used by all document transmission protocols. This program will do the transmission processing appropriate to the selected Shipped Delivery Method.
**Article Exchange Workflows**

1. The Borrowing library requests a copy of an article or book-chapter, and sets the requested delivery-method to be “Article Exchange”

2. When the request arrives at the lending library, the Lender scans the appropriate article or chapter and attaches the resulting PDF / GIF / JPG to the request in the usual way.

On the full request, details form click on “Choose File”, and select the appropriate scanned document from the local PC hard drive.

Click on the Attach button to upload the scanned document into the VDX document store.

3. The Lender performs the “Shipped” action on the request once the scan has been attached, ensuring that the shipped delivery method is “Article Exchange”

<table>
<thead>
<tr>
<th>Requested Service Type</th>
<th>Copy non returnable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipped Service Type</td>
<td>Copy non returnable</td>
</tr>
<tr>
<td>Shipped Item</td>
<td></td>
</tr>
<tr>
<td>Number of Items</td>
<td>1</td>
</tr>
<tr>
<td>Ship Date</td>
<td>22 Mar 2013</td>
</tr>
<tr>
<td>(e.g. 10 Jun 2009)</td>
<td></td>
</tr>
<tr>
<td>Media Type</td>
<td>Audio DVD</td>
</tr>
<tr>
<td>Delivery Method</td>
<td>Article Exchange</td>
</tr>
<tr>
<td>E Delivery Params</td>
<td></td>
</tr>
<tr>
<td>Delivery Locator</td>
<td></td>
</tr>
<tr>
<td>Conditions</td>
<td>No reproduction</td>
</tr>
</tbody>
</table>

4. In the background, VDX performs an AE Upload web service call and transfers the scanned document into the AE cloud server. If successful, VDX puts the returned document Access URL and Password into the Shipped Note field.

5. The Shipped message is transmitted to the borrower

6a) If the Requesting VDX has an active Document Store:

The requesting VDX system processes the incoming Shipped-Indication message. If the Shipped Delivery method is “Article Exchange” it looks for Access URL and Password in the Notes field. If they are present, VDX then performs an
AE Download web service call using the details in the "Note" and retrieves the document from the AE cloud and stores it in the local VDX document store. VDX will set the request's status to “Received Electronically” and the request will appear in the borrower’s “Received” work queue. The document is now available for access via WebAdmin, Zportal, DocFetch, etc, depending upon the local requester-to-patron doc delivery settings in force at that location.

**Brief display of request in “Received” work queue showing a link to the received document (inDocStore), and status of “Received Electronically”:**

![Brief display of request in “Received” work queue showing a link to the received document (inDocStore), and status of “Received Electronically”](image)

**Request full display showing Shipped-Indication message which leads to the Shipping Note, and a direct link to the downloaded document in the VDX document store:**

![Request full display showing Shipped-Indication message which leads to the Shipping Note, and a direct link to the downloaded document in the VDX document store](image)
6b) If the requesting VDX does not have an active Document Store

The requesting VDX system processes the incoming Shipped-Indication message. If the shipped delivery method is “Article Exchange” VDX will set the request status to “Received Electronically” and the request will appear in the borrower’s “Received” work queue.

When the borrowing staff view the Request details, they will be able to view the Shipped Note which will include the Article Exchange Access URL and password. These can be cut and pasted from the Note and used to manually retrieve the document from Article Exchange via a standard browser.

Full Request display showing that the document access info has been delivered to enable the library to manually download the document from Article Exchange:

https://help.oclc.org/Resource_Sharing/VDX/VDX_release_notes_and_known_issues/2013_VDX_release_notes/0...
Details of the “Shipped Note” in the request which includes the access details for retrieving the document manually from Article Exchange:

After cutting and pasting the Access URL into a browser search field, the Article Exchange download page is displayed, using the Password supplied in the Shipping Note, the user can now manually download the document onto their local PC:
If the local copyright laws permit - VDX can be configured to send a Received User Alert to the patron, which itself incorporates the Access URL and Password from the Shipped Note, thereby allowing the patron to retrieve the document from Article Exchange for themselves.

### Bugs fixed in this release

<table>
<thead>
<tr>
<th>ISSUE #</th>
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<tbody>
<tr>
<td>VDX-10643</td>
<td>Sorting request search results by Date-of-last-action</td>
</tr>
<tr>
<td></td>
<td>We have reinstated the ability to sort requests by “Last Action Date”.</td>
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<tr>
<td></td>
<td>However, the ability to sort requests by “Last Action” has been deferred to a later release because it is no longer a straight-forward operation to implement this feature.</td>
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<tr>
<td>VDX-10884</td>
<td>Navigator / WMS Holdings</td>
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<td>When VDX parsed WMS library holdings it was routing requests to the holding branch location.</td>
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<td></td>
<td>For Navigator systems, it is more usual to route requests to circulating shelf locations, as this tells VDX whether the item is loanable or not.</td>
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<td></td>
<td>So we have modified the VDX WMS holdings parser to pull the routing symbol from three different holdings fields - depending on whether they are present in the</td>
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<tr>
<td>ISSUE #</td>
<td>DESCRIPTION</td>
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<tr>
<td></td>
<td>holdings record or not</td>
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<tr>
<td></td>
<td>The holdings fields are tried in the following priority order:</td>
</tr>
<tr>
<td></td>
<td>1. The holding branch shelving location. (Marc 852$b+c)</td>
</tr>
<tr>
<td></td>
<td>2. The holding branch (Marc 852$b)</td>
</tr>
<tr>
<td></td>
<td>3. The holding institution (Marc 852$a)</td>
</tr>
<tr>
<td>VDX-11048</td>
<td>NCIP Integration: Manually triggered Request-Item message.</td>
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<td></td>
<td>From now on a manually applied Answer: Hold can be configured to cause a “Reserve Title For User” circulation. This can be useful if, for some reason, the initial incoming request failed to trigger an automatic hold on the requested title.</td>
</tr>
<tr>
<td>VDX-11265</td>
<td>DocFind-Responder configuration</td>
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<tr>
<td></td>
<td>The requested item’s Item Format can now be used as a key to DocFindResponder configuration. A new drop-down list of Item Formats has been added to the Windows Admin Client DocFind-Responder configuration screen</td>
</tr>
</tbody>
</table>
NCIP: Circulation action retries

We have improved the labeling on the (circulation) Retries configuration screen in Windows Admin Client in order to make clear what the various settings mean in terms of retry intervals, number of retries at each interval, and provide a maximum number of retries.

1. The default retry interval is 5 minutes
2. There will be no more than 3 retries
3. But from retry no 2 onwards, the retry interval will be 2 minutes
4. We have added a read-only machine-generated summary to make it clear what the defined configuration will do

"Retries 1 to 2 at 5-minute interval
Retries 3 to 3 at 2-minute interval"

UnityUK Pick & Ship List

The UnityUK Pick & Ship list for sheet-music requests was something printing the address labels across two
A local fix made by the Operations Support team has been incorporated into this version of VDX.

**NCIP Check-In function.**

VDX was always performing a borrower-side check-in on receiving a Checked-In Indication from the lender when it should only have been doing this if the current request indicated that it was a “Pickup Anywhere” request.

**Dutch Printed Music Broker**

The Dutch printed music broker automation was not passing back to the borrower increases in service cost negotiated between broker and supplier.

The actual Shipped Cost (from lender to broker) usually gets relayed back to the borrowing library. However, many Dutch requests get satisfied by suppliers using the CBS ILL system. The protocol between VDX and CBS does not support the passing of the Shipped Cost from the supplier, so there was no Shipped Cost to be relayed back to the Borrower from the Broker.

We have fixed this by adding a new configuration field to the Auto Broker Config section called “Default Broker Shipped Cost”. This new flag will always be set to “N” or NULL by default. When it is set to “Y”, and the action at the broker is “Broker Shipped”, then the Cost-To-Request field on the broker’s view of the request will be copied into the Shipped Cost field on the broker-lender Shipped message. This will ensure that the borrower’s “Cost to Request” will reflect the same value as that of the Broker.

**Request for Request driver**

Had trouble handling titles that included diacritics. This has been fixed.
Updated NCIP client software

VDX’s NCIP client software library has been updated.

This new version supports five additional “protocol flavours” that allow it to communicate with various vendor’s circulation systems.

The new NCIP “Flavours” are:

<table>
<thead>
<tr>
<th>FLAVOUR</th>
<th>USAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>WMS/NCIP/2</td>
<td>For use with OCLC’s WorldShare Management System</td>
</tr>
<tr>
<td>NCIPTOOLKIT/NCI P/2</td>
<td>For use with generic NCIP V2.0 systems</td>
</tr>
<tr>
<td>ALMA/NCIP/2</td>
<td>For use with ExLibris’s new ALMA system using NCIP V2.0</td>
</tr>
<tr>
<td>POLARIS/NCIP/1</td>
<td>For use with NCIP V1.0 Polaris systems</td>
</tr>
<tr>
<td>SYMPHONY/NCIP/1TITLELEVELHOLDS</td>
<td>For use with SirsiDynix Symphony when title level rather than item level holds are required</td>
</tr>
</tbody>
</table>

For a full description of all the supported “flavours” and how they affect NCIP messaging, please refer to the internal OCLC WIKI page: [http://intranet-wiki.oclc.org/wiki/Protocol_Flavours](http://intranet-wiki.oclc.org/wiki/Protocol_Flavours)

Resend Request Message

We have re-instated the ability to Resend failed Request messages.
SIP Circulation messaging

In the VOB system, when a requested CD is received, VDX sends a SIP Create-Item message to the local circulation system. But the SIP “CK” field was missing from the message, which meant that the Item-Format of the item was not getting passed over to the circulation system. This resulted in the circulation system being unable to check-out the item to the patron.

We have now added the missing “CK”

NCIP Configuration

We have split out the “Checked In” configuration on NCIP Server Details so that Borrower Side check-in can be configured separately from Lender Side check-in. The Windows Client defines these now as “Borrower Return Item” and “Lender Return Item”

WebAdmin: Changing the current Bureau library

Location names that contained a “#” character were causing the WebAdmin client to fail to move to the location when Bureau Admin users selected it as the current Bureau / Location when run with Firefox or Chrome web browsers.

Item Formats

Material Format 902 (Music Score) has been amended to have a default Media Type of “1 Printed” and not “2 Photocopy”

UnityUK IFM Reports

After the 7.0 upgrade, UnityUK IFM reports were being generated with a page-break after each request. This has now been fixed.
Location Suspensions were overrunning by one day

VDX runs a nightly background task to check whether a library is suspended or not - and updates its status accordingly.

This job has been running at 11:00 each night, which means that a library whose last day of suspension falls on the night the job runs, the library remains flagged as suspended for the whole of the following day. This means that libraries appear closed for a day longer than they ought to.

To fix this, we now run the suspension checking program immediately after midnight, so that the suspension will terminate immediately on the morning after its final closed day.

Reply Dates getting set at past dates

It was noted that when caching reply date information, the system was caching the actual date, rather than the number days from which a reply date could be calculated. This meant that if the system was left running long enough, the reply-dates, etc would be set for a date in the past.

Cached dates now expire at midnight, so that the cached date has to be re-read first thing each day - ensuring that they no longer get more and more obsolete.

“CGSA” broadcast catalog search component.

The Z39.50 search ‘CGSA’ component was found to have performance issues, whereby, on occasion, it could use up its allocation of search threads, causing the whole system to hang with 100% CPU usage.

This problem has now been fixed.

Also, the CGSA properties file now includes Citations in the list of loadable bib formats.
NCIP Check-Out function failing to run

Due to a subtle timing issue, when a Copy request was changed to a Loan at the point of being Shipped, VDX was failing to trigger the related NCIP CheckOut-Item message to the supplier’s circ system.

We have fixed this problem by changing the point in the Shipped action when the circulation drivers check the service-type.

Slow SQL for some user logins

We have discovered that if the default user group on the auth-service-param record was empty, then it defaulted to a non-existing user group of “0”. This lead to the creation of a large number of “empty” user group records which choked the SQL lookup on user login.

This unwanted default user group is no longer created at login...

UnityUK Reports:

The “Requests To Be Acknowledged” report had stopped displaying results properly. This has been fixed

UnityUK Reports:

Bulk Printed request listings were showing public notes accumulating from one request to another. This has been fixed.

Message notes now appear on the main request display notes areas as well as being visible on the individual actions in the Audit trail.

Brokering:

When the original borrower sent a note after receiving a Broker-Shipped message, the intermediary driver generated an error trying to forward the note to the
Broker-Lender transaction.

The missing transaction rule for this combination of status and message has been fixed.

Brokering:

When the original borrower tried to renew and overdue loan, the intermediary driver generated an error trying to forward the renewal request to the Broker-Lender transaction.

The missing transaction rule for this combination of status and message has been fixed.

VDX-12440

DocFind-Responder

DocFind-Responder was still duplicating call-numbers under certain circumstances. This has now been addressed.

VDX-12447

Dutch Pick/Ship list

When the requested material type is “Software” the Pick/Ship list now includes the operating system details taken from the request.

VDX-12473

Request creation form

This form was not taking notice of the user’s “Can Authorise” permission - and was including the “authorized” in the drop-down list of authorization-statuses, even when the user did not have the “Can Authorise” permission.

VDX-12506