
Voyager Pick and Scan Overview

- **Product:** Voyager
 - **Relevant for Installation Type:** All
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Pick and Scan overview for Voyager 9.0 and later.

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Question

Overview of Voyager Pick and Scan.

Introduction

Pick and Scan is a client-based tool that enables operators with permissions in the Voyager Cataloging or Circulation clients to make one or multiple changes to item records, their associated holdings, and/or associated bibliographic records in a single process. This tool may additionally be used to delete items and their associated MFHDs and bibliographic records. *Item records must be present in the hierarchy to run Pick and Scan.* Jobs can be run using item barcodes or record IDs (item, holding, or bib IDs). Records may be processed individually or from a file. Results of preview and production changes are saved to the server and can be saved locally.

Who can Use Pick and Scan?

User security permissions set in the System Administration module determine which capabilities a user has in Pick and Scan. See the Security > Cataloging Profiles and the Security > Circulation Profiles.

The Three Workspace Tabs

Pick and Scan contains three workspace tabs: Changes to Make, Records to Change, and Logs. For first time use on a workstation, operators should set their preferences on the Logs tab as described below. Once these settings are established, jobs are typically processed in the following order:

1. Changes to Make
2. Records to Change
3. Logs

Changes to Make Tab

The **Changes to Make tab** is where you select those changes you wish to make to one or more records.

By default, all options are either set as “No Change” or unselected.

Locations

Change item record permanent or temporary locations by selecting from the available locations. Anytime item permanent locations are changed, Support recommends *changing the Holdings Location simultaneously* to ensure the holding record's 852 \$b location is kept in sync with the item record's permanent location. Temporary location data has a “clear” option to remove any data temporarily added.

Types

Change permanent, temporary, or media item types by selecting from those available. Use the Clear option to remove any item types currently set in temporary or media item types.

Self Check

Change magnetic media and sensitize flags on item records by selecting Yes or No. These settings are used as alerts with third-party self-check machines during check in, check out, and renewal transactions.

Item Free Text

Select Clear to remove data in item records' free text field. Select Append to add additional text to the existing content in the field or select Replace with to overwrite the existing data with the text you enter in the text box provided.

Copy Number

Adjust item copy numbers using the Replace with command. Support strongly recommends you avoid selecting the Reset to copy 0 option and instead start copy number increments with copy 1. A default of copy 1 can be set in your Cataloging client Session Defaults and Preferences (Options-Preferences-Item Defaults tab).

Pieces

The number of pieces designation on the item record can be cleared using the Reset to 1 option or changed to a specified number using the Replace with command.

Item Price

Replace the existing price(s) with a specified amount using the Replace with command. Or, you can select Reset to 0 (zero) to clear any existing item prices. If your library has a default Lost Item Replacement Fee set in the System Administration module, you may not typically add prices to item records unless the copy costs more than the replacement fee. (This default is set in System Administration – Circulation – Policy Definitions – Items tab – Item settings “Replacement Cost”.)

Item Status

Select from the list of item statuses and specify if you wish to Add selected, Remove selected, or Delete existing, add selected. This final option will replace the existing statuses with the statuses you select. Item statuses available to select

include: At Bindery, Cataloging Review, Circulation Review, Claims Returned, Damaged, In Process, In Transit, Lost-Library Applied, Missing, and Withdrawn. Hold down the Ctrl key in order to select multiple statuses. The Clear option will only clear the statuses you have selected on the list.

Statistical Categories

Select from the list of statistical categories defined in the Voyager System Administration module and specify if you wish to Add selected, Remove selected, or Delete existing, add selected. This final option will replace existing statistical categories with those you select from the list. Hold down the Ctrl key in order to select multiple categories. The Clear option will only clear the categories you have selected on the list.

Delete

Item records, and if desired, their associated holdings and bibliographic records can all be deleted in a single process. Deletions follow the hierarchy of item – holding – bib. All items attached to a holding must be removed before the holding can be deleted. Similarly, all holdings attached to a bib must be deleted before a bib can be deleted. Item records must be present in order to delete holdings and bibs.

Suppress from OPAC

Select Suppressed or Unsuppressed for Bibs or MFHDs to change the suppress flag on the record's MARC tab. Note, MFHDs cannot be unsuppressed with Pick and Scan if their location is suppressed in the System Administration module.

Holding Location

Change the 852 \$b location data by selecting the appropriate available location. Support recommends changing the (item) Location's setting *simultaneously* to ensure location data in the MFHD and item record remain in sync.

852 subfield k

Change call number prefixes in the 852 \$k of holdings records by either selecting Delete to remove the 852 \$k entirely, or using the Replace with option to overlay the existing prefix with the new prefix you enter in the available text box. Note, if multiple 852 \$k's exist, only the first will be changed.

Records to Change Tab

The **Records to Change tab** is where you specify the records that you wish to change, indicate how those changes should be performed, and process the change.

Record identifier is where you specify if the records to change will be identified by item barcode, item ID, Holding ID, or Bibliographic ID. This setting works in conjunction with the Identifier or File field when processing a file.

Perform changes against is where you specify how to process the changes:

1. This item only
2. All items on this holdings record
3. All items on all holdings

This item only processes changes against a single item and those records directly associated with that item.

All items on this holdings record includes all related item records associated with a single holding.

All items on all holdings processes all items and holdings records attached to a bib.

Support cautions you to use the all items on this holding and all items on all holdings features wisely. Be sure you have reviewed your data well before selecting these options to avoid any accidental deletion or change to records that should not have been processed. When selecting these options, always run a preview of the job first since there is no undo option.

What to do

Here you can indicate if the job should run in Preview mode or Update Database mode. Always run Preview first since there is no undo option once a job has run against your database. A warning of “THIS IS ONLY A PREVIEW – NO RECORDS CHANGED” displays when a job is run in Preview mode. After reviewing the Preview logs, select Update Database to process the changes against your database.

Stop processing upon first error encountered when processing a file of records

Can be used for both Preview and Update Database modes. This setting will usually cause a pop up warning to stop the process when errors occur. Check the log files for additional information about the error (ex. “Unable to delete. Item is currently charged”).

Identifier

This option allows one-by-one processing of jobs using a barcode scanner or manually copying barcodes or record IDs into the field. Click the check mark icon to process the changes.

File

Select the ellipsis to choose the file of barcodes or record IDs to process. Each barcode or record ID must be on a separate line or row in the file. When processing jobs with multiple changes, Support recommends separating larger jobs into files of 500 records or less. This will help avoid significant client slowdown while the job processes. Note that Pick and Scan may be sensitive to network instability when using a file to provide IDs or barcodes. In these situations it will report "item id not found".

Print List

Click this option to print the processing information report displayed in the before/after window on the Records to Change tab. If unclear, use the server logs to differentiate an Update job vs. a Preview job.

Save to File

Click this option to save the processing information report displayed on the Records to Change tab. If unclear, use the server logs to differentiate an Update job vs. a Preview job.

Log Tab

The **Logs tab** is where you will set your logging preferences and access server logs. Logging Preferences should be set up ahead of processing your first job. These preferences are saved from session to session, and shared across the Cataloging and Circulation clients. So, if you move from one client to another, the settings will remain the same if you have the same level of permissions in both Cataloging and Circulation clients.

The Log Folder preference setting will need to be reset if the operator changes computers. All preferences will need to be set for each operator id, even when the same workstation is used.

Log Folder

Create a folder on your PC or shared network drive to locally save and view Pick and Scan logs. Then, select the Log Folder ellipses to browse and select that folder, and click Save.

Locally log any problems

This setting will only log problems encountered and will save the log to your designated Log Folder. A full log of changes and problems is saved on the server and can be retrieved using the Get Log feature (described below).

Locally log OCLC numbers for deleted & suppressed bibliographic records

This setting will log OCLC numbers for deleted and suppressed bibliographic records and save them directly to your designated Log Folder. This file can be used with OCLC Connexion Client’s batch feature to remove your library’s holdings from WorldCat.

Get Log

This feature will retrieve the highlighted server log and save it to your local Log Folder. The server log identifies all changes and problems encountered in a specific Pick and Scan run. If the Get Log button does not appear on your screen, you will need to temporarily adjust your Voyager.ini file's [GlobalLogs] stanza to Encrypt=N (note below) in order to enable the feature.

Server Logs

The naming convention for server logs follows the following structure:
"PASLog." + Process ID + "." + Timestamp

Process ID is automatically generated by Voyager and is used to keep the log names unique. The timestamp will likely be most useful for identification.

Additional Information

See the [Circulation User's Guide or the Cataloging User's Guide](#) for more information about Pick and Scan.

See also: [What changes can Pick and Scan make?](#)

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