



Voyager[®] 9.2.1

System Administration User's Guide

September 2016

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About This Document

Purpose

This document provides instructions for configuring the Voyager® System Administration Module. As a sophisticated system, Voyager offers a wide array of options that allows you to configure the software to reflect your library's policies.

This user's guide offers information to help you make informed decisions before you enter your choices into the system. It includes screens from the Voyager System Administration module and a wealth of detail intended to provide you with the necessary information for making your customizing and implementation decisions. Some of these decisions you'll need to make before the conversion and load of your bibliographic, holdings, item, and patron data files into Voyager.

Those of you who have already implemented another library system may find information in this user's guide to be familiar. Voyager's design, while using advanced technology and client/server architecture, includes what most librarians recognize as basic system functionality. Consequently, Voyager may not vary dramatically from your previous system with regards to its software configuration requirements.

However, while you may find equivalents, Voyager's terminology, wealth of options, depth of functionality, and individual features are unique. It is only natural when changing systems to "translate" from one to another. That approach has its risks. Since each system has its own "language," attempts at literal translations can lead to inexact and sometimes misleading information. This user's guide should help you learn Voyager on its own terms so that you can make a smooth transition from your previous system.

No matter what your previous experience has been, your implementation can be as simple or as complex as your library policies. Simple and uncomplicated policies are easy, and more complicated policies take more effort. As you and your colleagues begin discussions about the various decisions you must make, this may be an excellent opportunity to rethink some policies and procedures to reduce complexity and thereby streamline your implementation.

It is important to remember that you can also make changes in the future as you learn more about the system and possibly as your policies change. Once your system is up and running, fine-tuning Voyager is simple with some first-hand experience. As you progress through the user's guide, remember that expert help is only a telephone call or e-mail message away.

Intended Audience

This document is intended for Voyager System Administrators. It has been written for those who have the responsibility of implementing the Voyager® integrated library system.

Reason for Reissue

This user's guide incorporates and is being reissued for the following reason:

- Replaced [Figure 8-15](#) on [page 8-23](#)
- Updated [Miscellaneous](#) on [page 4-96](#) with additional information regarding the port for the Reorder Service URL parameter

Document Summary

This document consists of the following:

Chapter 1	“Getting Started” Chapter 1 provides an overview of Voyager System Administration including a description of conventions about commands, dialog boxes, buttons, and keyboard shortcuts plus a description of how to log in to the application.
Chapter 2	“Acquisitions Configuration” Chapter 2 provides information regarding options available for things such as policy definitions, fund types, purchase order types, and fiscal periods in the Acquisitions section of Voyager System Administration.

- Chapter [3](#) [“Call Slip Configuration”](#)
Chapter [3](#) provides information regarding options available for no-fill reasons, rules, and queues in the Call Slip section of Voyager System Administration.
- Chapter [4](#) [“Cataloging Configuration”](#)
Chapter [4](#) provides information regarding options available for importing records (authority, bibliographic, holdings, and item) for the Cataloging module of Voyager System Administration.
- Chapter [5](#) [“Circulation Configuration”](#)
Chapter [5](#) provides information regarding options needed for circulation purposes such as circulation policies, patron setup, and calendars.
- Chapter [6](#) [“Defining Circulation Blocks”](#)
Chapter [6](#) defines the different types of circulation blocks and describes how to handle them when they occur.
- Chapter [7](#) [“OPAC Configuration”](#)
Chapter [7](#) provides information regarding options available for call slip request messages, holdings sort groups, patron self-registration, request forms, and so on. This chapter is meant to be read in conjunction with the Voyager WebVoyage User’s Guide.
- Chapter [8](#) [“Search Configuration”](#)
Chapter [8](#) provides information regarding search options such as what search results information displays, what indexes to use in the search, what sort options to apply, and so on.
- Chapter [9](#) [“Security”](#)
Chapter [9](#) provides information regarding security options available for operator profiles, master security profiles, cataloging profiles, and so on.
- Chapter [10](#) [“System”](#)
Chapter [10](#) provides information regarding system-wide options available such as printing locations, fines/fees definitions, currency specifications, item types, statistical categories, and so on.
- Chapter [11](#) [“Web Services”](#)
Chapter [11](#) provides information regarding configuration options for web services such as patron self-registration, PIN, and SMS services.
- Appendix [A](#) [“Search Definition Tables”](#)
Appendix [A](#) provides information regarding options available for customizing search options beyond the preset options provided.

Appendix B	“Z39.50 Attribute Codes” Appendix B provides information regarding the attributes used in Z39.50 connections.
Appendix C	“Embedded Order Data” Appendix C provides additional information regarding bulk import and the use of embedded order data (EOD) to enhance the acquisitions process.
Appendix D	“ISBN-13 Support” Appendix D describes ISBN-13 support/implementation in Voyager.
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 *Curator 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.

OPTIONAL:

Indicates course of action which is not required, but may be taken to suit your library's preferences or requirements.

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Introduction

This chapter describes the prerequisite installations and configurations necessary for beginning work in Voyager System Administration.

Purpose of this Chapter

This chapter's purpose is to provide easy-to-follow directions for configuring the Voyager System Administration Module.

Prerequisite Skills and Knowledge

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

- Basic Microsoft® Interface navigation
- Basic UNIX® commands and navigation
- Basic knowledge of MARC record formats

Before You Begin

Working with the Voyager® System Administration software is enhanced by the availability of documentation, online help, and the use of common conventions. This section describes the purpose of these resources in order for you to effectively use of them.

Documentation and Online Help

The documentation and online help are designed to work together to provide you with the information you need, when you need it.

Generally, the online help provides context-sensitive information, information that is specific to the task you are trying to accomplish. You can access context-sensitive online help about any Voyager window or dialog box by pressing the **F1** function key on your keyboard.

The user's guides are designed to cover the applications in greater detail, including pictures of screens, advanced topics, and cross references to other user's guides and topics.

Conventions

Most conventions used in the Voyager documentation are Windows standard conventions. For more information about these conventions, please refer to your Windows documentation. However, we have outlined some of the conventions below.

Commands

Voyager functions and activities can be accessed through menu and submenu options as well as the listbar. To designate which menus and submenus are being referred to in the user's guides and online help, we have adopted a convention of specifying the menu, submenu (if necessary), and function or activity in the following manner.

Example: File > Exit

This is used to indicate the **Exit** activity on the **File** menu.

Dialog Boxes and Windows

Throughout this user's guide, references are made to windows and to dialog boxes.

A dialog box contains command buttons and various kinds of options through which users can carry out a particular command or task.

A window is a display of current information. You do not have to acknowledge data on a window to proceed to other activities in different windows. You can have multiple windows open at the same time. For certain Voyager modules, activities can only occur in an active window. A window is active when the title bar of the window is highlighted (usually a royal blue color).

Special Buttons

Some Voyager fields have special buttons. These special buttons are the **ellipsis** button and the **drop-down arrow** button.



Ellipsis Button



Drop-down Arrow Button

Ellipsis buttons indicate that additional information is available, either in a new dialog box or in an expanded text box. Click the **ellipsis** button to access the additional information.

Drop-down arrow buttons indicate that a selection must be made from certain existing categories. To access these categories, click the **drop-down arrow** button. Click the appropriate category to select it.

Keyboard Access

Some functions listed on Voyager menus have corresponding keyboard equivalents. In addition, certain functions are assigned keyboard shortcuts. Both types of keyboard access are described in the following. All keyboard equivalents and shortcuts are indicated on the menus.

Keyboard equivalents allow you to perform activities without requiring you to use the mouse. Keyboard equivalents are indicated by an underlined letter in the name of a menu or function. To access a menu or function using keyboard equivalents, press the Alternate key (Alt) or the **F10** key followed by the underlined letter. For example to exit a Voyager module, press and release the **Alt** key followed by the **f** key (for the Eile menu), followed by the **x** key (for Exit).

A number of functions are also assigned keyboard shortcuts. Keyboard shortcuts allow you to press and hold the control key (Ctrl) and then press the designated letter. For example, when the Save command is available you can press and hold the **Ctrl** key followed by the **s** key (for Save).

Following Windows conventions, the **Tab** key can be used to move the cursor to fields and buttons within dialog boxes and windows. Press and hold the Shift key and then press the tab key to move the cursor in the opposite direction through the dialog box or window. Use the escape key (Esc) to close a drop-down menu or dialog box.

The **F4** function key (or **F8** in some instances) can be used to display drop-down arrow selections. These keys can also be used to display fields represented by ellipsis buttons. In addition, items listed in drop-down menus can be scrolled through by typing the first letter of the item that you want to display. To scroll through additional items that begin with the same letter, type that letter again.

You can use the arrow keys on your keyboard to move through lists of options. The up and down arrow keys can also be used to select radio buttons. The escape key (ESC) can be used to close certain dialog boxes. The space bar can be used to highlight a selection in list boxes. Once a selection has been highlighted in a list box, you can press the **Enter** key to select it.

Numbers in brackets such as [10] indicate the maximum number of characters allowed for the data element. For box selections, putting an "X" or check mark in the box means "Yes." Leaving a box blank means "No." Position the cursor on a box and click the mouse to either add or delete an "X" or check mark.

Keyboard Command Summary

Use [Table 1-1](#) for a summary of the keyboard commands.

Table 1-1. Keyboard commands

To:	Press:
Access context-sensitive help	F1
Access menu or function	Click Alt or F10 , then the underlined letter as indicated in the menu.
Close certain dialog boxes.	ESC
Display drop-down arrow selections Display fields represented by ellipsis buttons	F4 (F8 in some instances)
Highlight a selection in list boxes	Space bar

Table 1-1. Keyboard commands

To:	Press:
Move the cursor to fields and buttons within dialog boxes and windows	Tab
Move cursor in opposite direction to fields and buttons within dialog boxes and windows	Shift+Tab
Save	Alt + s
Scroll through items listed in drop-down menus.	First letter of the item
Select highlighted option in list box	Enter

Logging In to Voyager System Administration

Before you can begin working in the Voyager System Administration module, you must log in with your operator ID and password. If you are logging in for the first time, you need to use the default Operator Id and Password provided in [Procedure 1-1, Logging In to Voyager System Administration.](#)



Procedure 1-1. Logging In to Voyager System Administration

Use the following to log in to the Voyager System Administration module.

1. Open the Voyager **System Administration** module using the method specific to your system such as double-clicking an icon on your desktop or clicking **Start>Programs>Voyager>SysAdmin**. The **Login** dialog box opens (See [Figure 1-1](#)).

Figure 1-1. The System Administration Logon dialog box

2. Enter your Operator ID in the **Operator Id** field.

This field is case sensitive.

Enter **SYSADMIN** (uppercase) as the Operator ID the first time you log in. For more information regarding your first log in, see [Logging in to the System Administration Module for the First Time](#) on [page 9-2](#).

3. Enter your password in the **Password** field.

This field is case sensitive.

Enter **EISI** (uppercase) as your Password the first time you log in.

NOTE:

The password is masked with asterisks when entered. See [Figure 1-2](#).



Figure 1-2. Password field masked with asterisks

4. Click **OK** to log in or click **Cancel** to close the **Login** dialog box.

Result: You now have access to the Voyager System Administration module.

Click the icons on the tool bar or select from the menus to proceed. For more information about logging in to Voyager, see [Security](#) on [page 9-1](#).

Single Client Login

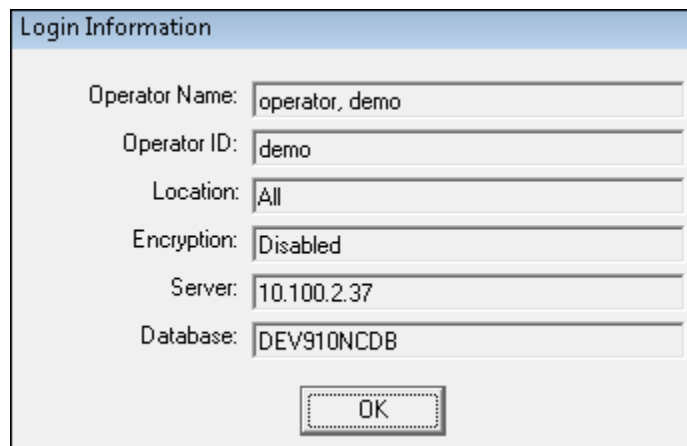
If your library enables Single Client Login, you only enter the Operator ID and Password for the first module you open on that computer. Single Client Login sends your Operator ID and Password to each subsequent module opened on the same computer if your user's profile has the necessary privileges to open other modules. The **Login** dialog box is not displayed for other modules opened using Single Client Login.

For more information about Single Client Login (including configuration information), see the *Voyager Technical User's Guide*.

Login Information

From the Voyager System Administration client, you can access the following login information by clicking **File > Login Information**:

- Operator name
- Operator ID
- Location
- Encryption (enabled/disabled)
- Server (as defined in the Server= parameter in the `voyager.ini` file)
- Database

A screenshot of a 'Login Information' dialog box. The dialog has a title bar with the text 'Login Information'. Inside, there are six labeled text input fields: 'Operator Name' with the value 'operator, demo', 'Operator ID' with 'demo', 'Location' with 'All', 'Encryption' with 'Disabled', 'Server' with '10.100.2.37', and 'Database' with 'DEV910NCDB'. At the bottom right of the dialog is an 'OK' button.

Field	Value
Operator Name	operator, demo
Operator ID	demo
Location	All
Encryption	Disabled
Server	10.100.2.37
Database	DEV910NCDB

Figure 1-3. Login Information Displayed

Introduction

The Acquisitions section in the Systems Administration module allows sites to define and configure Acquisitions.

The Acquisitions listbar includes buttons to access the Acquisitions workspaces.

In this section users can perform the following activities.

- Create/Edit/Delete Adjust Reasons
- Create/Edit/Delete Claim Types
- Create/Edit/Delete Fiscal Periods
- Create/Edit/Delete Fund Types
- Create/Edit/Delete Mark Reasons
- Create/Edit/Delete PO Types
- Create/Edit/Delete Policy Definitions
- Create/Edit/Delete Vendor Reports
- Create/Edit/Delete Vendor Types

[Figure 2-1](#) shows the main Acquisitions listbar.



Figure 2-1. Acquisitions listbar

Adjust Reasons

Adjustments can be made to the price of an entire Purchase Order (PO) or Invoice, as well as the line item, or the individual copies of a line item. Adjust Reasons explain why a price has changed. For example, a discount is applied.

The **Adjust Reasons** populate the **Charge Type** field of the **Add/Edit Adjustment** dialog box. See the *Voyager Acquisitions User's Guide* for more information.

The following are system supplied Adjust Reasons:

- Discount
- Processing Charge
- Shipping Charge
- Sales Tax

Security

Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Adjust Reasons** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Adjust Reasons Workspace

Creating, editing, and deleting Adjust Reasons is done in the **Acquisitions - Adjust Reasons** workspace.

When first entering the **Acquisitions - Adjust Reasons** workspace, the top half displays (see [Figure 2-2](#)). It shows the names of any Adjust Reasons already defined.

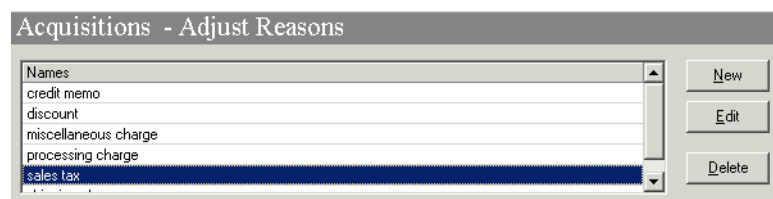
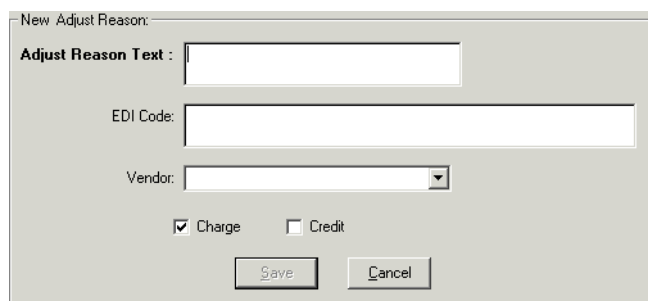


Figure 2-2. Acquisitions - Adjust Reasons Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Adjust Reasons** workspace opens (see [Figure 2-3](#)). In this example, the fields are blank because the **New** button was selected.



New Adjust Reason:

Adjust Reason Text :

EDI Code:

Vendor:

☒ Charge ☐ Credit

Figure 2-3. New Adjust Reason section

Field Descriptions

[Table 2-1](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Acquisitions - Adjust Reasons** workspace.

Table 2-1. Fields in the Acquisitions - Adjust Reasons Workspace

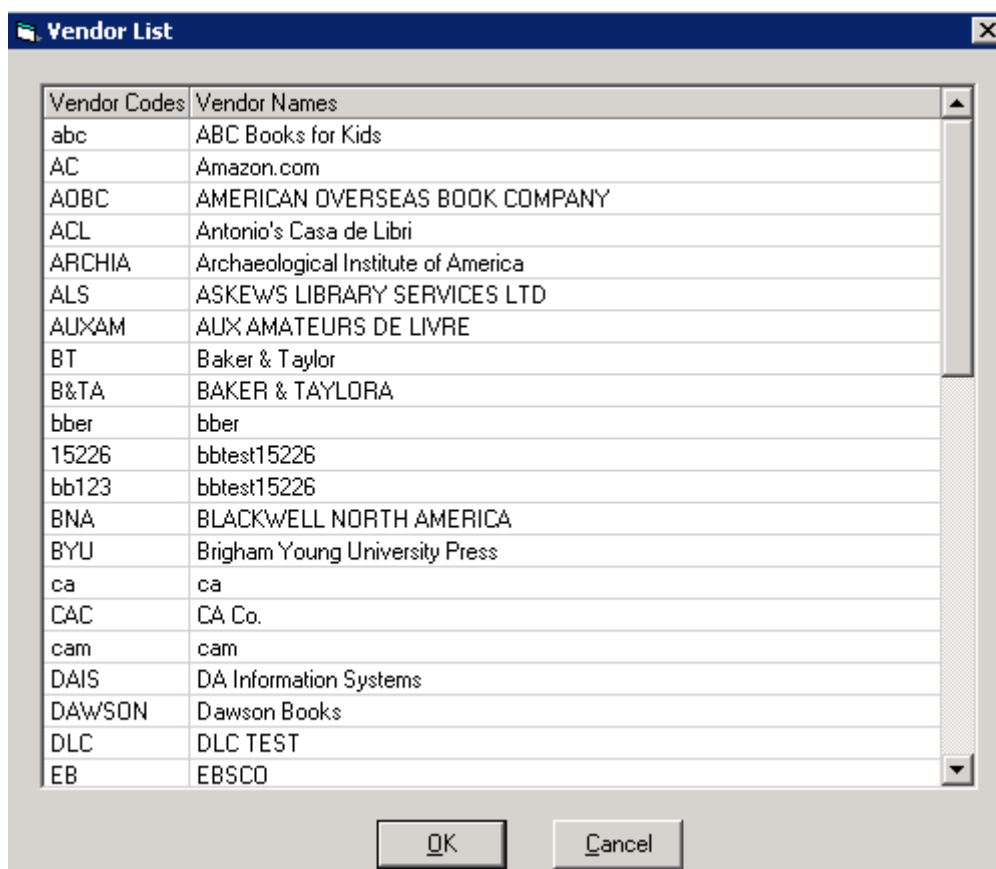
Name	Description	Required	Type and Range
Adjust Reason Text	This explains why the price has been changed. This text displays in the Add/Edit Adjust dialog box.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 50 characters

Table 2-1. Fields in the Acquisitions - Adjust Reasons Workspace

Name	Description	Required	Type and Range
EDI Code	The EDI code describes the purpose of the adjustment. For each adjustment reason, there should be a corresponding EDI code. See the <i>EDItEUR Guidelines</i> at http://www.editeur.org and your EDI vendor for more information. NOTE: If an incoming message includes an adjust reason that does not already exist in your system, the new adjust reason and EDI Code will be added automatically.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 250 characters.
Vendor	The vendor for whom the adjustment applies. NOTE: This means that the reason can only be used for this vendor.	No	Drop-down list or pop-up window created from the vendors defined in the Acquisitions/Serials module. NOTE: Click the ellipsis button for the pop-up window format that displays when your list of vendors is greater than 5,000. See Figure 2-4.
Charge	When checked, the adjust reason is going to be applied as a charge. The amount specified is added to the amount.	Either the Charge or Credit check box must be checked.	Check box The default is checked.

Table 2-1. Fields in the Acquisitions - Adjust Reasons Workspace

Name	Description	Required	Type and Range
Credit	When checked, the Adjust Reason is going to be applied as a credit. The amount specified is subtracted from the amount.	Either the Charge or Credit check box must be checked.	Check box The default is unchecked.

**Figure 2-4. Vendor List pop-up window**

Creating an Adjust Reason

This section provides step-by-step instructions on how to create an Adjust Reason in the Acquisitions section of the System Administration module.



Procedure 2-1. Creating an Adjust Reason

Use the following to create an Adjust Reason:

1. Access the System Administration module's **Acquisitions - Adjust Reason** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Adjust Reasons** button in the System listbar.

Result: The **Acquisitions - Adjust Reasons** workspace opens.

2. Enter the name for your Adjust Reason in the **Adjust Reason Text** field.
3. Enter an Electronic Data Interchange Code in the **EDI Code** field.
4. If wanted, select a vendor from the drop-down menu in the **Vendor Code** field. This means that the reason is only available for this vendor.
5. Click the **Charge** check box if this Adjust Reason is going to be applied as a charge or click the **Credit** check box if this Adjust Reason is going to be applied as a credit.
6. Click **Save** to save the information or click **Cancel** to return to the **Acquisitions - Adjust Reason** workspace

Result: If saved, the system returns to the **Acquisitions - Adjust Reasons** workspace and the new Adjust Reason displays in the list of reasons.

Editing an Adjust Reason

This section provides step-by-step instructions on how to edit an Adjust Reason in the Acquisitions section of the System Administration module.

Sites may edit Adjust Reasons.



Procedure 2-2. Editing Adjust Reasons

Use the following to edit an Adjust Reason.

1. Access the System Administration module's **Acquisitions - Adjust Reason** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Adjust Reasons** button in the System listbar.

Result: The **Acquisitions - Adjust Reasons** workspace opens.

2. Highlight the Adjust Reason to be edited.
3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes

Result: If saved, the system returns to the **Acquisitions - Adjust Reasons** workspace and the Adjust Reason has been edited.

Deleting an Adjust Reason

This section provides step-by-step instructions on how to delete an Adjust Reason in the Acquisitions section of the System Administration module.

Sites may delete adjust reasons.



Procedure 2-3. Deleting Adjust Reasons

Use the following to delete an Adjust Reason.

1. Access the System Administration module's **Acquisitions - Adjust Reason** workspace.
 - a. Click **Acquisitions** in the listbar.

b. Click the **Adjust Reasons** button in the System listbar.

Result: The **Acquisitions - Adjust Reasons** workspace opens.

2. Highlight the Adjust Reason to be deleted.
3. Click the **Delete** button.

Result: The **Delete Adjust Reason** dialog box opens asking for confirmation of the deletion (see [Figure 2-5](#)).

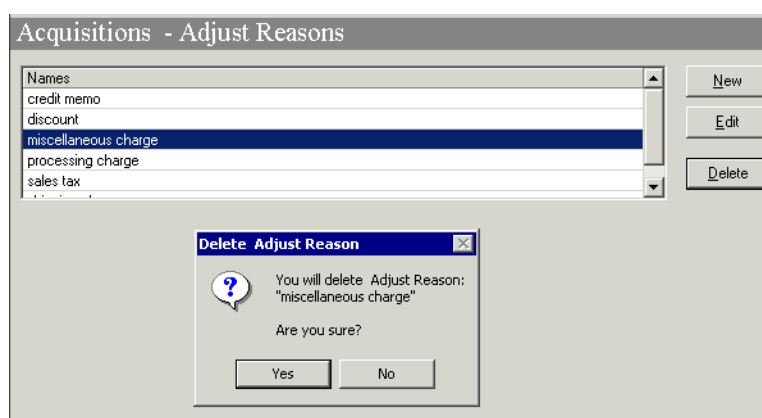


Figure 2-5. Delete Adjust Reason confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Adjust Reason.

Result: If deleted, the system returns to the **Acquisitions - Adjust Reasons** workspace and the Adjust Reason is immediately removed from the listing of reasons.

Claim Types

When a claim is generated from the **Problems** Screen or the **Claims** Screen in the Acquisitions module, a claim type is specified to communicate to the vendor the specific reason for the claim. Using the **Acquisitions - Claim Types** workspace ([Figure 2-6](#)), you can create numerous claim types that are available for use when claims are generated.

For more information about generating claims from the **Problems** Screen and the **Claims** Screen in the Acquisitions module, see the *Voyager Acquisitions User's Guide*.

The following are system supplied claim types:

- No copies received
- Wrong item(s) supplied
- Imperfect item(s) supplied
- Too many copies received
- Copies received in damaged condition
- Insufficient copies received
- Other reason

Security

Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Claim Types** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Claim Types Workspace

Creating, editing, and deleting Claim Types is done in the **Acquisitions - Claim Types** workspace.

When first entering the **Acquisitions - Claim Types** workspace, the top half displays (see [Figure 2-6](#)). It shows the names of any Claim Types already defined.

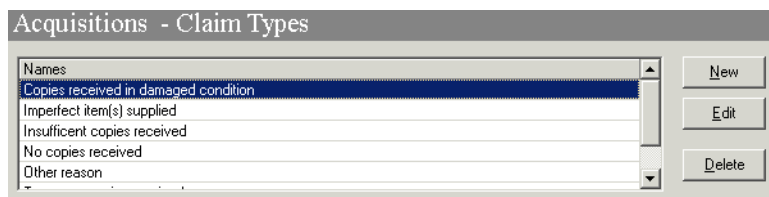


Figure 2-6. Acquisitions - Claim Types Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Claim Types** workspace opens (see [Figure 2-7](#)). In this example, the fields are filled because the **Edit** button was selected.



Figure 2-7. Edit Claim Types section

Field Descriptions

[Table 2-2](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Acquisitions - Claim Types** workspace.

Table 2-2. Fields in the Acquisitions - Claim Types Workspace

Name	Description	Required	Type and Range
Claim Description	A Claim Type is any reason or situation that would, according to your acquisition policies, cause you to question a receipt or shipment or alert you that something about the item or situation needs investigation. For example: • Copies received in damaged condition • Insufficient copies received • Wrong item(s) supplied	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 70 characters.

Table 2-2. Fields in the Acquisitions - Claim Types Workspace

Name	Description	Required	Type and Range
EDI Code	The EDI code describes the purpose of the claim. For each claim there should be a corresponding EDI code. See the <i>EDItEUR Guidelines</i> at http://www.editeur.org and your EDI vendor for more information.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 250 characters.

Creating a Claim Type

This section provides step-by-step instructions on how to create a Claim Type in the Acquisitions section of the System Administration module.



Procedure 2-4. Creating a Claim Type

Use the following to create a Claim Type.

1. Access the System Administration module's **Acquisitions - Claim Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Claim Types** button in the System listbar.

Result: The **Acquisitions - Claim Types** workspace opens.

2. Enter the description of the new claim type in the **Claim Description** field.
3. Enter the code that EDI uses to identify the claim type into the **EDI code** field.
4. Click **Save** to save the information or click **Cancel** to return to the **Acquisitions - Claim Types** workspace.

Result: If saved, the system returns to the **Acquisitions - Claim Types** workspace and the new Claim Type displays in the list of types.

Editing a Claim Type

This section provides step-by-step instructions on how to edit a Claim Type in the Acquisitions section of the System Administration module.

Sites may edit Claim Types but if you change an existing Claim Type, that change is reflected on any existing problem listing.



Procedure 2-5. Editing Claim Types

Use the following to edit a Claim Type.

1. Access the System Administration module's **Acquisitions - Claim Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Claim Types** button in the System listbar.

Result: The **Acquisitions - Claim Types** workspace opens.

2. Highlight the Claim Type to be edited.
3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the system returns to the **Acquisitions - Claim Types** workspace and the Claim Type has been edited.

Deleting a Claim Type

This section provides step-by-step instructions on how to delete a Claim Type in the Acquisitions section of the System Administration module.

Sites may delete Claim Types. However, once a Claim Type has been used, the Claim Type cannot be deleted until all items with that Claim Type have been removed from the problem listing.

If a Claim Type is not in use, it can be deleted (except for the system-supplied ones).



Procedure 2-6. Deleting Claim Types

Use the following to delete a Claim Type.

1. Access the System Administration module's **Acquisitions - Claim Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Claim Types** button in the System listbar.

Result: The **Acquisitions - Claim Types** workspace opens.

2. Highlight the Claim Type to be deleted.
3. Click the **Delete** button.

Result: The **Delete Claim Type** dialog box opens asking for confirmation of the deletion (see [Figure 2-8](#)).

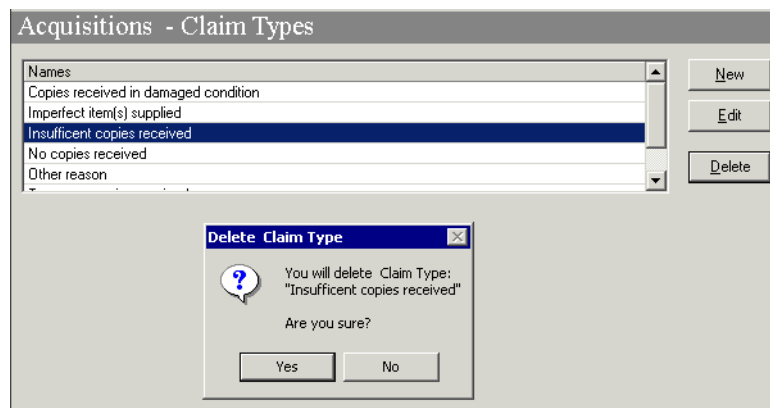


Figure 2-8. Delete Claim Types confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Claim Type.

Result: If deleted, the system returns to the **Acquisitions - Claim Types** workspace and the Claim Type is immediately removed from the listing of types.

Fiscal Periods

A Fiscal Period establishes a time-span used at your institution for your acquisition budget.

In the Acquisitions module, you assign a Fiscal Period to each Ledger. All funds belonging to that Ledger share the same Fiscal Period.

There is no Voyager-specified limit on the number of Fiscal Periods that you can define. You must define at least one.

The dates for Fiscal Periods can overlap. In this case be sure that staff members select the correct ledger when assigning funds to copies on a line item. When Fiscal Periods overlap, staff will be able to see both ledgers on PO line items.

You need to add a Fiscal Period for each new fiscal period.

Security

Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Fiscal Periods** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Fiscal Periods Workspace

Creating, editing, and deleting Fiscal Periods is done in the **Acquisitions - Fiscal Periods** workspace.

When first entering the **Acquisitions - Fiscal Periods** workspace, the top half displays (see [Figure 2-9](#)). It shows the names of any Fiscal Periods already defined.

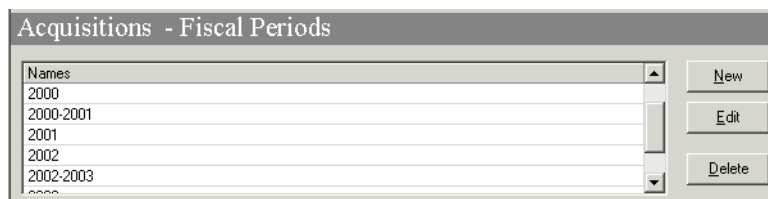


Figure 2-9. Acquisitions - Fiscal Periods Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Fiscal Periods** workspace opens (see [Figure 2-10](#)). In this example, the fields are blank because the **New** button was selected.

Figure 2-10. New Fiscal Period section

Field Descriptions

[Table 2-3](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Acquisitions - Fiscal Periods** workspace.

Table 2-3. Fields in the Acquisitions - Fiscal Periods Workspace

Name	Description	Required	Type and Range
Fiscal Period Name	Name of the Fiscal period. At least one Fiscal Period must be defined. For example: - July-June FY 02 - Calendar FY 2003	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.

Table 2-3. Fields in the Acquisitions - Fiscal Periods Workspace

Name	Description	Required	Type and Range
Start Date	The date that the Fiscal Period begins.	Yes	Date The Start Date must be before the End Date.
End Date	The date that the Fiscal Period ends.	Yes	Date

Start and End Date Information

Additional information regarding start and end dates.

- The system validates your dates to prevent entry of non-existent ones such as 04/31.
- If you enter a 1-digit number, the system supplies a 0 to the left.
- When entering dates or times, the Microsoft® Windows Regional Settings control the display in the Voyager module.
- Enter 2-digit numbers from 01-12 to represent the months January-December.
- Enter 2-digit numbers to represent the beginning day of the first month of the Fiscal Period.
- Enter 2-digit numbers to represent the final day of the last month of the Fiscal Period.
- Enter 4-digit numbers to represent the year(s) of the Fiscal Period.

Creating a Fiscal Period

This section provides step-by-step instructions on how to create a Fiscal Period in the Acquisitions section of the System Administration module.



Procedure 2-7. Creating a Fiscal Period

Use the following to create a Fiscal Period.

1. Access the System Administration module's **Acquisitions - Fiscal Periods** workspace.
 - a. Click **Acquisitions** in the listbar.

- b. Click the **Fiscal Periods** button in the System listbar.

Result: The **Acquisitions - Fiscal Periods** workspace opens.

2. Enter the name for your Fiscal Period in the **Fiscal Period Name** field.
3. Enter a Start Date in the **Start Date** field.
4. Enter an End Date in the **End Date** field.
5. Click **Save** to save the information or click **Cancel** to return to the **Acquisitions - Fiscal Periods** workspace.

NOTE:

The Save button is inactive if the **End Date** specified is before today's date.

Result: If saved, the system returns to the **Acquisitions - Fiscal Periods** workspace and the new Fiscal Period displays in the list of Fiscal Periods.

Editing a Fiscal Period

This section provides step-by-step instructions on how to edit a Fiscal Period in the Acquisitions section of the System Administration module.



IMPORTANT:

Once established, the start date can be changed to an earlier date but not to a later date and the end date can be changed to a later date but not an earlier date. This means if you extend an end date, you cannot change it back.

If you change an existing Fiscal Period already in use, the change will be reflected in all Ledgers (and the ledgers' funds) with that Fiscal Period.

NOTE:

For funds with begin and end dates that match the dates of a ledger's fiscal period, any time the ledger's fiscal period is redefined in the System Administration module, the fund's dates will be changed accordingly.

On the contrary, for funds that have begin and end dates that differ from the dates of the ledger's fiscal period (that is, they have been manually altered), the dates will not be automatically updated if the ledger's fiscal period is redefined in the System Administration module.



Procedure 2-8. Editing Fiscal Periods

Use the following to edit a Fiscal Period.

1. Access the System Administration module's **Acquisitions - Fiscal Periods** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Fiscal Periods** button in the System listbar.

Result: The **Acquisitions - Fiscal Periods** workspace opens.

2. Highlight the Fiscal Period to be edited.
3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes

Result: If saved, the system returns to the **Acquisitions - Fiscal Periods** workspace and the Fiscal Period has been edited.

Deleting a Fiscal Period

This section provides step-by-step instructions on how to delete a Fiscal Period in the Acquisitions section of the System Administration module.

Users can only delete a Fiscal Period if it has not been used in a Ledger with active fund records or Rollover Rule.



Procedure 2-9. Deleting a Fiscal Period

Use the following to delete a Fiscal Period.

1. Access the System Administration module's **Acquisitions - Fiscal Periods** workspace.
 - a. Click **Acquisitions** in the listbar.

- b. Click the **Fiscal Periods** button in the System listbar.

Result: The **Acquisitions - Fiscal Periods** workspace opens.

2. Highlight the Fiscal Period to be deleted.
3. Click the **Delete** button.

Result: The **Delete Fiscal Period** dialog box opens asking for confirmation of the deletion (see [Figure 2-11](#)).

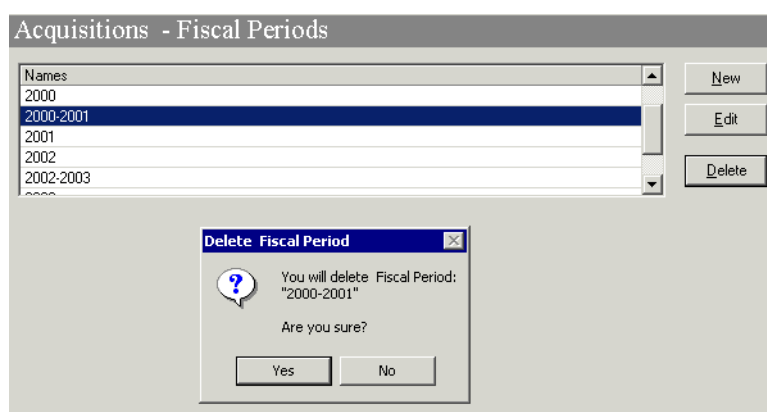


Figure 2-11. Delete Fiscal Periods confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Fiscal Period.

Result: If deleted, the system returns to the **Acquisitions - Fiscal Periods** workspace and the Fiscal Period is immediately removed from the listing of Fiscal Periods.

Fund Types

Fund Types help to group individual acquisition funds by the basic characteristics important to your library. There is no limit to the number of Fund Types you can define. If your library has a relatively simple budget process, you may have only one Fund Type. You must have at least one.

You define certain default values at this level. When you create an individual fund record and assign it to a Fund Type, the fund automatically inherits these values as its defaults. This simplifies the setup of your fund structure. You can always change the default values for any individual fund.

The following are system supplied fund types:

- Endowment
- General
- Gift
- Grant

Security

Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Fund Types** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on page 9-27.

Fund Types Workspace

Creating, editing, and deleting Fund Types is done in the **Acquisitions - Fund Types** workspace.

When first entering the **Acquisitions - Fund Types** workspace, the top half displays (see [Figure 2-12](#)). It shows the names of any Fund Types already defined.

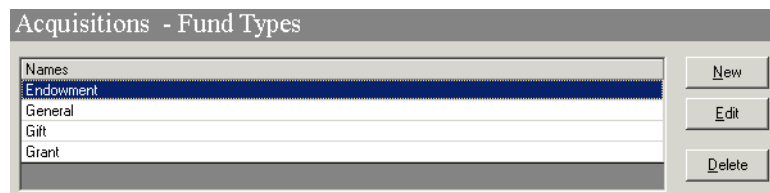


Figure 2-12. Acquisitions - Fund Types Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Fund Types** workspace opens (see [Figure 2-13](#)). In this example, the fields are blank because the **New** button was selected.

New Fund Type:

Fund Type Name:

☐ Overcommit Limit: ☐ Overexpend Limit:

☐ Overcommit Warning: ☐ Overexpend Warning:

☐ Undercommit: ☐ Underexpend:

Figure 2-13. New Fund Type section

Field Descriptions

[Table 2-4](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Acquisitions - Fund Types** workspace.

Table 2-4. Fields in the Acquisitions - Fund Types Workspace

Name	Description	Required	Type and Range
Fund Type Name	Name of the type of fund. For example: - Regular - Non-Recurring - Deposit	Yes You must define at least one Fund Type.	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.
Overcommit Limit check box	When checked, the Overcommit Limit percentage field must be completed, allowing operators to overcommit a fund.	No	Check box The default is unchecked.
Overcommit Limit percentage	The amount (expressed as 100% plus the additional percentage) to be overcommitted when there is an inadequate fund balance to cover the cost of a pending commitment. If larger, the fund will be blocked from use on the purchase order.	Yes, if the Overcommit Limit check box is checked.	100-999 Must be a whole percentage.

Table 2-4. Fields in the Acquisitions - Fund Types Workspace

Name	Description	Required	Type and Range
Overexpend Limit check box	When checked the Overexpend Limit percentage field must be completed allowing operators to overexpend a fund.	No	Check box The default is unchecked.
Overexpend Limit percentage	The amount (expressed as 100% plus the additional percentage) to be overexpended when there is an inadequate fund balance to cover the cost of a pending expenditure. If larger the fund will be blocked from use in an invoice.	Yes, if the Overexpend Limit check box is checked.	100-999 Must be a whole percentage.
Overcommit Warning check box	When checked the Overcommit Warning percentage field must be completed, warning operators when they approach the fund's limit.	No	Check box The default is unchecked.
Overcommit Warning percentage	The amount (expressed as a 100% plus the additional percentage) of the fund's limit that, when reached, will warn operators that they are reaching the fund's limit, when a fund is selected for use on a purchase order.	Yes, if the Overcommit Warning check box is checked.	100-999 Must be a whole percentage.
Overexpend Warning check box	When checked the Overexpend Warning percentage field must be completed, warning operators when they approach the fund's limit.	No	Check box The default is unchecked.
Overexpend Warning percentage	The amount (expressed as a 100% plus the additional percentage) of the fund's limit that, when reached, will warn operators that they are reaching the fund's limit, when a fund is selected for use on an invoice.	Yes, if Overexpend Warning check box is checked.	100-999 Must be a whole percentage.

Table 2-4. Fields in the Acquisitions - Fund Types Workspace

Name	Description	Required	Type and Range
Undercommit check box	When checked the Undercommit percentage field must be completed, warning operators when they have not committed enough from this fund.	No	Check box The default is unchecked.
Undercommit percentage	The level of undercommitment (expressed as a 100% plus the additional percentage) when the fund is not being used enough. This data element applies to a printed report produced to monitor funds.	Yes, if the Undercommit check box is checked.	100-999 Must be a whole percentage.
Underexpend check box	When checked the Underexpend percentage field must be completed, warning operators they have not expended enough from this fund.	No	Check box The default is unchecked.
Underexpend percentage	The level of underexpending (expressed as a 100% plus the additional percentage) when the fund is not being used enough. This data element applies to a printed report produced to monitor funds.	Yes, if the Underexpend check box is checked.	100-999 Must be a whole percentage.

Creating a Fund Type

This section provides step-by-step instructions on how to create a Fund Type in the Acquisitions section of the System Administration module.



Procedure 2-10. Creating a Fund Type

Use the following to create a Fund Type.

1. Access the System Administration module's **Acquisitions - Fund Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Fund Types** button in the System listbar.

Result: The **Acquisitions - Fund Types** workspace opens.

2. Enter the name for your Fund Type in the **Fund Type Name** field.
3. Check any of the check boxes you want to apply, and enter a percentage amount in the corresponding percentage field.
4. Click **Save** to save the information or click **Cancel** to return to the **Acquisitions - Fund Types** workspace.

Result: If saved, the system returns to the **Acquisitions - Fund Types** workspace and the new Fund Type displays in the list of Fund Types.

Editing a Fund Type

This section provides step-by-step instructions on how to edit a Fund Type in the Acquisitions section of the System Administration module.

You may change any or all information during the configuration/implementation process.

You can change any or all information about a Fund Type or add new ones. If you make a change to an existing Fund Type already in use, the change is reflected in all fund records assigned to that Fund Type.



Procedure 2-11. Editing a Fund Type

Use the following to edit a Fund Type.

1. Access the System Administration module's **Acquisitions - Fund Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Fund Types** button in the System listbar.

Result: The **Acquisitions - Fund Types** workspace opens.

2. Highlight the Fund Type to be edited.
3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes

Result: If saved, the system returns to the **Acquisitions - Fund Types** workspace and the Fund Type has been edited.

Deleting a Fund Type

This section provides step-by-step instructions on how to delete a Fund Type in the Acquisitions section of the System Administration module.

You may delete any or all information during the configuration/implementation process. However, once you assign an active fund record to a Fund Type, you cannot delete the Fund Type.



Procedure 2-12. Deleting a Fund Type

Use the following to delete a Fund Type.

1. Access the System Administration module's **Acquisitions - Fund Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Fund Types** button in the System listbar.

Result: The **Acquisitions - Fund Types** workspace opens.

2. Highlight the Fund Type to be deleted.
3. Click the **Delete** button.

Result: The **Delete Fund Types** dialog box opens asking for confirmation of the deletion (see [Figure 2-14](#)).

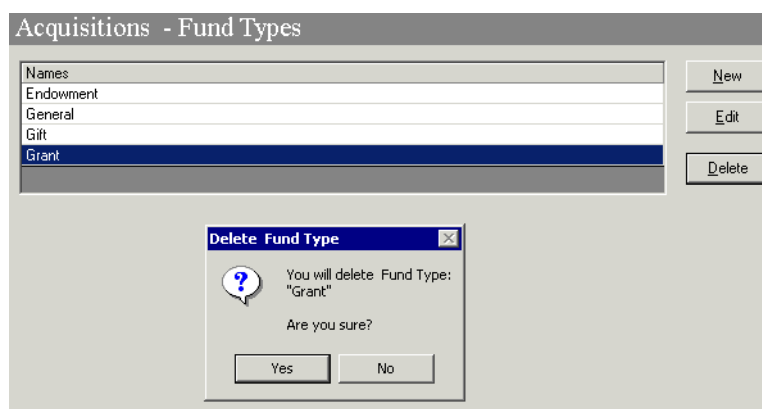


Figure 2-14. Delete Fund Types confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Fund Type.

Result: If deleted, the system returns to the **Acquisitions - Fund Types** workspace and the Fund Type is immediately removed from the listing of Fund Types.

Mark Reasons

When an operator using the Acquisitions/serials module encounters a situation requiring further investigation, the operator can mark the line item copy or serial issue and identify the applicable situation. This results in a display of the line item copy or serial issue on a problem screen where another operator can review the situation and determine further action. For more information, see the *Voyager Acquisitions User's Guide*.

Certain Mark Reasons are system-defined and cannot be changed or deleted. These are:

- System Cancel (for use by the system)
- System Claim (for use by the system)
- Claim (for use by operators)
- Cancel (for use by operators)
- Return (for use by operators)

Administrators do not need to add any other Mark Reasons unless wanted.

Security

Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Mark Reasons** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Mark Reasons Workspace

Creating, editing, and deleting Mark Reasons is done in the **Acquisitions - Mark Reasons** workspace.

When first entering the **Acquisitions - Mark Reasons** workspace, the top half displays (see [Figure 2-15](#)). It shows the system supplied Mark Reasons.

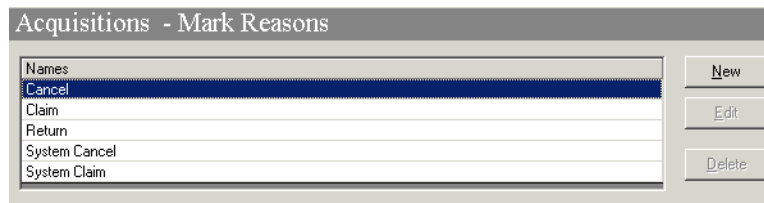


Figure 2-15. Acquisitions - Mark Reasons Workspace

NOTE:

The system supplied Mark Reasons may not be edited or deleted; those buttons are inactive.

After clicking the **New** button, the bottom half of the **Acquisitions - Mark Reasons** workspace opens (see [Figure 2-16](#)). In this example the drop-down menu of Claim Types is also displayed.

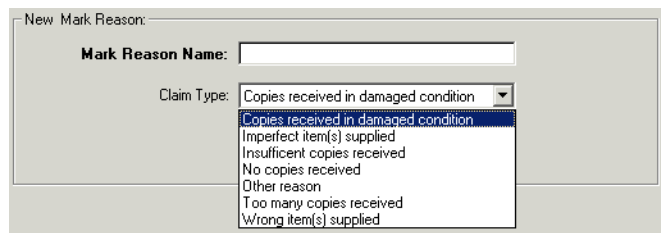


Figure 2-16. New Mark Reason section

Field Descriptions

[Table 2-5](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Acquisitions - Mark Reasons** workspace.

Table 2-5. Fields in the Acquisitions - Mark Reasons Workspace

Name	Description	Required	Type and Range
Mark Reason Name	Define any reason or situation that would, according to your acquisition policies, cause you to question a charge, question a receipt or shipment, or alert you that something about the item or situation needs investigation. For example: • Damaged • Overdue • Wrong Edition • High Cost	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.
Claim Type	The reason for making a claim, that is, the problem with the item.	Yes	Drop-down menu of Claim Types created in the Acquisitions - Claim Types workspace. See Claim Types Workspace on page 2-10

Creating a Mark Reason

This section provides step-by-step instructions on how to create a Mark Reason in the Acquisitions section of the System Administration module.



Procedure 2-13. Creating a Mark Reason

Use the following to create a Mark Reason.

1. Access the System Administration module's **Acquisitions - Mark Reasons** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Mark Reasons** button in the System listbar.

Result: The **Acquisitions - Mark Reasons** workspace opens.

2. Enter the name for Mark Reason in the **Mark Reason Name** field.
3. Select a Claim Type from the drop-down menu in the **Claim Type** field.
4. Click **Save** to save the information or click **Cancel** to return to the **Acquisitions - Mark Reasons** workspace

Result: If saved, the system returns to the **Acquisitions - Mark Reasons** workspace and the new Mark Reason displays in the list of Mark Reasons.

Editing a Mark Reason

This section provides step-by-step instructions on how to edit a Mark Reason in the Acquisitions section of the System Administration module.

Sites may only edit the Mark Reasons that they create. System supplied Mark Reasons may not be edited.

If you change an existing Mark Reason, that change is reflected on any existing problem listing.



Procedure 2-14. Editing a Mark Reason

Use the following to edit a Mark Reason:

1. Access the System Administration module's **Acquisitions - Mark Reasons** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Mark Reasons** button in the System listbar.

Result: The **Acquisitions - Mark Reasons** workspace opens.

2. Highlight the Mark Reason to be edited.
3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes

Result: If saved, the system returns to the **Acquisitions - Mark Reasons** workspace and the Mark Reason has been edited.

Deleting a Mark Reason

This section provides step-by-step instructions on how to delete a Mark Reason in the Acquisitions section of the System Administration module.

Sites may only delete the Mark Reasons that they created. System supplied Mark Reasons may not be deleted.

Once a Mark Reason has been used, the Mark Reason cannot be deleted until all items with that Mark Reason have been removed from the problem listing. If a Mark Reason is not in use, it can be deleted.



Procedure 2-15. Deleting a Mark Reason

Use the following to delete a Mark Reason.

1. Access the System Administration module's **Acquisitions - Mark Reasons** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Mark Reasons** button in the System listbar.

Result: The **Acquisitions - Mark Reasons** workspace opens.

2. Highlight the Mark Reason to be deleted.
3. Click the **Delete** button.

Result: The **Delete Mark Reasons** dialog box opens asking for confirmation of the deletion (see [Figure 2-17](#)).

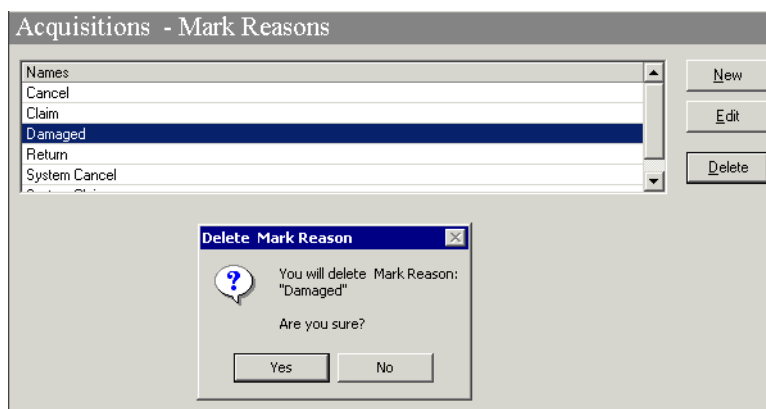


Figure 2-17. Delete Mark Reasons confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Mark Reason.

Result: If deleted, the system returns to the **Acquisitions - Mark Reasons** workspace and the Mark Reason is immediately removed from the listing of Mark Reasons.

PO Types

There are six system-defined purchase order (PO) types: Approval, Continuation, Depository, Exchange, Firm Order, and Gift. These PO Types cannot be edited or deleted.

In addition to the six system-defined purchase order types, you can create, edit, or delete any number of user-defined purchase order types.

User-defined purchase order types can be created and used to meet the various needs of your institution. For example, user-defined purchase order types can be used for acquisitions that fall outside of your institution's normal purchasing procedures.

In most respects, user-defined purchase order types function the same as the six system-defined purchase order types, for example reports can be generated, the claim/cancellation system applies, and funds must be assigned.



IMPORTANT:

User-defined purchase order types are not included in Fiscal Period Rollover. Therefore, you may want to avoid assigning line items that use funds from one fiscal year to the next (such as subscription line items) to a purchase order with a user-defined purchase order type.

PO Types list

The list of purchase order types from the **Acquisitions - PO Types** workspace populates the drop-down menus at the following places in the Acquisitions module:

- The **Default Order Type** field on the **Vendor Policies** tab of the **Acquisitions - Policy Definitions** workspace in the System Administration module (see [Figure 2-18](#)). See [Policy Definitions](#) on [page 2-42](#) for more information.

Figure 2-18. PO Types in the Policy Definitions

- The **Search For** field that displays when searching for a purchase order by PO Type in the Acquisitions module (see [Figure 2-19](#)). See the *Voyager Acquisitions User's Guide* for more information.

Figure 2-19. PO Types in the Search For field

- The **PO Type** field on all purchase orders in the Acquisitions module (see [Figure 2-20](#)). See the *Voyager Acquisitions User's Guide* for more information.

New Order

File Order Line Item Tools Help

Save Save and Close

Header Footer Notes Properties

Order

Number: 221

Type: Sample PO

Site: Approval
Continuation
Depository
Exchange
Firm Order
Gift
Other
Sample PO

Locations

Ship To:

Bill To: Sample PO

Vendor

Code:

Account:

Status Date: 9/18/2002

0 Line Items on Order

Amounts

Line Item Subtotal: \$0.00

Other Charges: \$0.00

Total Order Amount: \$0.00

Currency

Code:

Rate:

Figure 2-20. PO Types in the PO

- The **Order Type** field on the **Purchase Order** tab of the **Session Defaults** dialog box in the Acquisitions module (see [Figure 2-21](#)). See the *Voyager Acquisitions User's Guide* for more information.

Session Defaults

Ledger

Invoice

Purchase Order

Vendor

Fund

Line Item

Line Item Copies/Funds

Order Site: Sample PO

Ship To: Sample PO

Bill To: Sample PO

Vendor Code:

Account: Sample PO

Currency: USD

Order Type: Sample PO

Cancel After (days): 0

Claim Interval (days): 0

Ship Via: Continuation

Clear

OK Cancel Clear All

Figure 2-21. PO Types in Session Defaults

- The **Default PO Type** field on the **Add Vendor Account** and **Edit Vendor Account** dialog boxes on vendor records in the Acquisitions module (see [Figure 2-22](#)). See the *Voyager Acquisitions User's Guide* for more information.

The screenshot shows the 'Edit Vendor Account' dialog box with the 'Account Info' tab selected. The 'Account Number' is 12345 and the 'Account Name' is 'Popular Magazines'. The 'Default PO Type' is set to 'Continuation'. The 'Discount (%)' is 'Approval', 'Account Status' is 'Firm Order', and 'Deposit' is 'Gift'. A list titled 'Select Locations for Account:' contains 'Acquisitions' and 'Other Branch Acq. Desk'. At the bottom are 'OK' and 'Cancel' buttons.

Figure 2-22. PO Types in Edit (or Add) Vendor Account

Security

Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Purchase Order Types** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

PO Types Workspace

The **Acquisitions - PO Types** workspace contains an alphabetical list of all the existing purchase order types available for use in the Voyager Acquisitions module. The six system defined PO Types and any user-defined types.

Creating, editing, and deleting PO Types is done in the **Acquisitions - PO Types** workspace.

When first entering the **Acquisitions - PO Types** workspace, the top half displays (see [Figure 2-23](#)). It shows the names of any PO Types that are already defined.

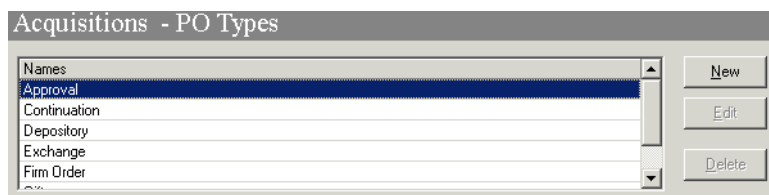


Figure 2-23. Acquisitions - PO Types Workspace

NOTE:

The system supplied PO Types may not be edited or deleted; those buttons are inactive.

After clicking either the **New** or the **Edit** button, the bottom half of the **Acquisitions - PO Types** workspace opens (see [Figure 2-24](#)).

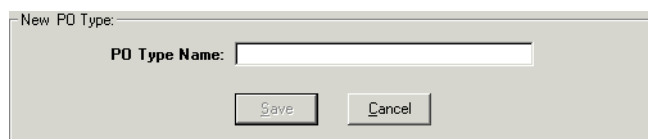


Figure 2-24. PO Types section

Field Description

[Table 2-6](#) provides the name, description, if required, and type and range requirements for the single field in the **Acquisitions - PO Types** workspace.

Table 2-6. Fields in the Acquisitions - PO Types Workspace

Name	Description	Required	Type and Range
PO Type Name	Enter a unique description or name of the purchase order type. You cannot enter a description or name that already exists in the list.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.

Creating a PO Type

This section provides step-by-step instructions on how to create a PO Type (user-defined PO Type) in the Acquisitions section of the System Administration module.



Procedure 2-16. Creating a PO Type

Use the following to create a PO Type.

1. Access the System Administration module's **Acquisitions - PO Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **PO Types** button in the System listbar.

Result: The **Acquisitions - PO Types** workspace opens.

2. Enter the name for your PO Type in the **PO Type Name** field.

Result: The example in [Figure 2-25](#) shows the PO Type name of Sample PO entered in the **PO Type Name** field.

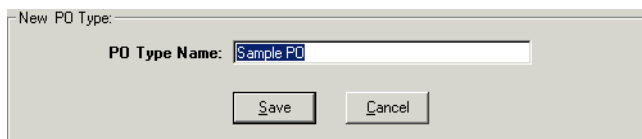


Figure 2-25. PO Type name entered in PO Type Name field.

3. Click **Save** to save the information or click **Cancel** to return to the **Acquisitions - PO Type** workspace.

Result: If saved, the new PO type is added to the list of PO types. Also the various PO Type lists are populated; see [PO Types list](#) on [page 2-34](#).

Editing a PO Type

This section provides step-by-step instructions on how to edit a PO Type in the Acquisitions section of the System Administration module.

Sites may only edit user-defined PO Types. You cannot edit any of the six system-defined purchase order types.



Procedure 2-17. Editing a PO Type

Use the following to edit a PO Type.

1. Access the System Administration module's **Acquisitions - PO Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **PO Types** button in the System listbar.

Result: The **Acquisitions - PO Types** workspace opens.

2. Highlight the user-defined PO Type to be edited.
3. Click the **Edit** button.
4. Enter any new information in the **PO Type Name** field.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes

Result: If saved, the system returns to the **Acquisitions - PO Types** workspace and the PO Type has been edited.

Deleting a PO Type

This section provides step-by-step instructions on how to delete a PO Type in the Acquisitions section of the System Administration module.

Sites may only delete user-defined PO Types. In addition, you cannot delete any user-defined purchase order types that are being used in a purchase order in the Acquisitions module.

If the operator selects a user-defined purchase order type to delete, a message displays asking the user to confirm the deletion.

If the operator selects a user-defined purchase order type to delete, and it is in use on a purchase order, a message stating the PO type is in use displays (see [Figure 2-26](#)).

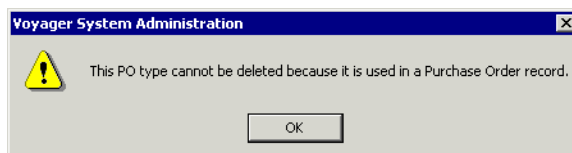


Figure 2-26. Message when Unable to Delete a PO Because It Is in Use

In order to delete such a purchase order type, you must first delete all of the purchase order records in which the purchase order type is being used.



Procedure 2-18. Deleting a PO Type

Use the following to delete a PO Type.

1. Access the System Administration module's **Acquisitions - PO Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **PO Types** button in the System listbar.

Result: The **Acquisitions - PO Types** workspace opens.

2. Highlight the user-defined PO Type to be deleted.
3. Click the **Delete** button.

Result: The **Delete PO Type** dialog box opens asking for confirmation of the deletion (see [Figure 2-27](#)).

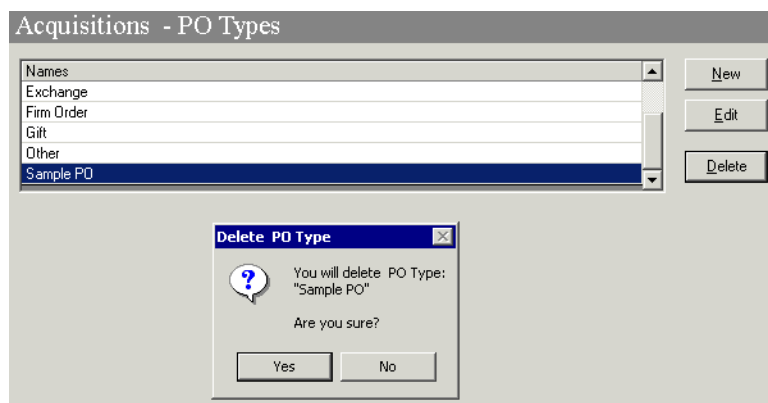


Figure 2-27. Delete PO Type confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the PO Type.

Result: If deleted, the system returns to the **Acquisitions - PO Types** workspace and the PO Type is immediately removed from the listing of PO Types.

The purchase order type is also removed from any of the PO Types lists in the modules; see [PO Types list](#) on [page 2-34](#).

Policy Definitions

Departments responsible for ordering, claiming, paying, or receiving items for various locations within the library should be defined as an Acquisitions/Serials Policy Group which should be associated with the locations at which the tasks are performed.

NOTE:

Consortia may want to set up separate Acquisition Policy Groups.

The **Acquisitions - Policy Definitions** workspace has the following tabs:

- Policy
- Locations
- Vendor Policies

Security

Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Policy Definitions** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Acquisitions - Policy Definitions Workspace

Creating, editing, and deleting the Acquisitions/Serials Policy Groups is done using the **Policy**, **Locations**, and **Vendor Policies** tabs of the **Acquisitions - Policy Definitions** workspace.

When first entering the **Acquisitions - Policy Definitions** workspace, the top half displays (see [Figure 2-28](#)). It shows the names of any Acquisitions/Serials Policy Groups already defined.

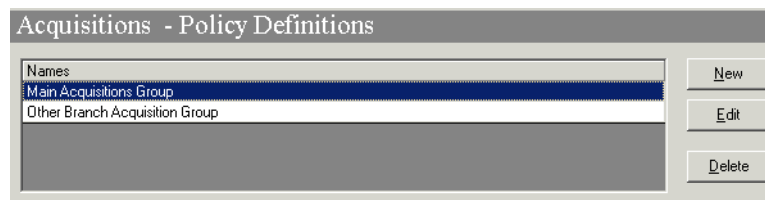


Figure 2-28. Acquisitions - Policy Definitions Workspace

After clicking either the **New** or **Edit** buttons, the tabs of the **Acquisitions - Policy** workspace display. [Figure 2-29](#) on [page 2-44](#), [Figure 2-30](#) on [page 2-46](#), and [Figure 2-31](#) on [page 2-51](#) show these tabs. In these examples, the **New** button had been selected, therefore the section of the workspace is called New Policy Definition.

Policy Tab

The **Policy** tab is where you can name the Acquisitions/Serials Policy Group and associate it with a Duplicate Detection Profile. [Figure 2-29](#) displays the **Policy** tab. See [Bibliographic Duplicate Detection](#) on [page 4-22](#) for more information.

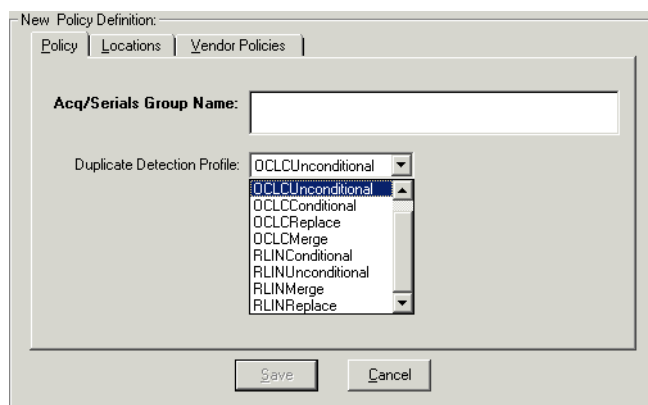


Figure 2-29. New Policy Definitions section, Policy tab

Field Descriptions

[Table 2-7](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Policy tab** of the **Acquisitions - Policy Definitions** workspace.

Table 2-7. Fields in the Policy tab in the Acquisitions - Policy Definitions Workspace

Name	Description	Required	Type and Range
Acq/Serials Group Name	Name of the Acquisitions or Serials policy group.  TIP: Create a name that describes the acquisition unit especially if you have more than one Policy Group. For example: • Main Acquisitions • Music Receiving.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 40 characters.

Table 2-7. Fields in the Policy tab in the Acquisitions - Policy Definitions Workspace

Name	Description	Required	Type and Range
Duplicate Detection Profile	Select the import/replace profile to be used when operators are importing line items on a purchase order. See Bibliographic Duplicate Detection on page 4-22 for information on bibliographic duplicate detection profile options.	Yes	Drop-down menu. Duplicate Detection Profiles are defined in the System Administration.

Locations Tab

Use the **Locations** tab to define selected locations for Acquisitions/Serials Policy Groups. [Figure 2-30](#) displays the **Locations** tab.

**IMPORTANT:**

If you do not add a location to an Acquisitions/Serials Policy Group, you cannot use the location as:

Intended location

Order site

Bill to location in a purchase order

Receiving location

Ledger location

NOTE:

A location can belong to only one Acquisitions/Serials Policy Group.

For each location in the **Selected** list box, you can specify any or all of the options listed in the bottom half of the **Locations** tab.

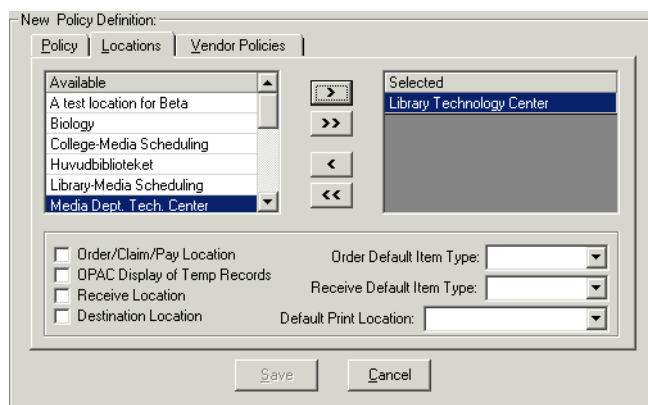


Figure 2-30. New Policy Definitions section, Locations tab

Field Descriptions

[Table 2-8](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Locations tab** of the **Acquisitions - Policy Definitions** workspace.

Table 2-8. Fields in the Locations tab in the Acquisitions - Policy Definitions Workspace

Name	Description	Required	Type and Range
Available Locations	Locations that have not been assigned to another Acquisitions/Serials Policy Group.	Yes	The locations are established in System Administration. See Locations on page 10-39 .
Selected Locations	Those location(s) that are associated with the Acquisitions/Serials Policy Group.	Yes	

Table 2-8. Fields in the Locations tab in the Acquisitions - Policy Definitions Workspace

Name	Description	Required	Type and Range
Order/Claim/Pay Location	When checked, it allows items to be ordered, claimed, or paid from the selected happening location. It is a place where acquisitions work is actually performed. When a location is defined as an Order/Claim/Pay Location, the letter o in parentheses (o) is displayed next to the location name in the Selected Locations column.	Yes, there must be at least one defined for each Group. You may have more than one for this Policy Group.	Check box The default is unchecked.
OPAC Display of Temp Records	When checked it allows bibliographic records created for an item, when creating a purchase order while logged in to that Order/Claim/Pay Location, to display in Web-Voyage. The order location on the Purchase Order controls the 'suppress from OPAC' flag on the bibliographic record. If the OPAC display of temp records check box is not checked for that location, the suppress flag will be set when the record is added to the database through creating a brief bibliographic record or importing a new record.	No	Check box The default is unchecked.

Table 2-8. Fields in the Locations tab in the Acquisitions - Policy Definitions Workspace

Name	Description	Required	Type and Range
Receive Location	When checked, it allows items to be received at the selected happening location. It is a place where receiving is actually performed. When a location is defined as a Receive Location, the letter r in parentheses (r) is displayed next to the location name in the Selected Locations column.	Yes, there must be at least one defined for each Group. You may have more than one for this Policy Group.	Check box The default is unchecked.
Destination Location	When checked it allows items to be delivered to the selected location the Holdings Location, where items are stored. All locations (except a happening location) are Destination Locations by default. The Destination Locations determine the list of intended locations for a line item in a purchase order.	No	Check box The default is unchecked.
Order Default Item Type	Sets the default type of order for the location.	No	Drop-down menu. The default is blank.
Receive Default Item Type	Sets the default type of item being received at the location.	No	Drop-down menu. The default is blank.
Default Print Location	Sets the print location where files generated by the Acquisitions module will be sent to Reporter.	No	Drop-down menu. The default is blank.

Suppression of Records in the OPAC when Added from the Acquisitions Module

New bibliographic records can be added to a Voyager database using the Acquisitions module from the purchase order. Operators use the **Add Line (Bib Import)** or **Add Line (Template)** buttons. Operators may also add records by

using the **Add Line Bib Search** button. When users choose **Add Line Bib Search**, and search the local database the bibliographic records, they find are already part of the Voyager database. The **Suppress from OPAC** check box on these records are not affected by any activity in Acquisitions.

New holdings records are added to the database when the intended location in a line item is different than the location in the 852 \$b field of any of the holdings records associated with the bibliographic record attached to the line item. If there is a holdings record with the same location as the intended location, the copy on order is linked to that existing holdings record. Since that record is already part of the Voyager database, its **Suppress from OPAC** check box is not affected.

When a new bibliographic record is added to the database using the Acquisitions module, the **Suppress from OPAC** check box is set based on whether the **OPAC Display of Temp Records** check box is checked on the order location. Every purchase order has an order location. If that order location has the **OPAC Display of Temp Records** check box checked in the System Administration module, then any bibliographic records added will not have their **Suppress from OPAC** check box checked. If, on the other hand, the **OPAC Display of Temp Records** check box is not checked, the bibliographic record will have the **Suppress from OPAC** check box checked.

When a new holdings record is added to the database using the Acquisitions module, the **Suppress from OPAC** check box is set based on whether the **OPAC Display of Temp Records** check box is checked on the intended location. Every copy on order has an intended location at the line item level. If the intended location has its **OPAC Display of Temp Records** check box checked in the System Administration module, then the holdings record will not have its **Suppress from OPAC** check box checked. If on the other hand, the intended location's **OPAC Display of Temp Records** check box is not checked, the new holdings record will have its **Suppress from OPAC** flag check box checked.

These rules are independent. The holdings record has its **Suppress from OPAC** check box checked regardless of the setting of the bibliographic record. This can lead to bibliographic records that are visible in the OPAC, while holdings records are not, or holdings records that are visible, while bibliographic records are not.

[Table 2-9](#) shows the situations in which Bibliographic and Holdings records are suppressed from the OPAC depending on the Order Location and Intended Location.

Table 2-9. Suppress From OPAC Options

Type of Location	OPAC Display of Temp. Records	Type of Record/Suppressed or not
Order Location Intended Location	Not Checked Checked	Bib/Suppressed MFHD/Not Suppressed
Order Location Intended Location	Not Checked Not Checked	Bib/Suppressed MFHD/Suppressed
Order Location Intended Location	Checked Checked	Bib/Not Suppressed MFHD/Not Suppressed
Order Location Intended Location	Checked Not Checked	Bib/Not Suppressed MFHD/Suppressed

NOTE:

These rules do not apply when purchase order records are created as part of Bulk Import. Instead, the Bulk Import rules and the global location settings for **Suppress from OPAC** will be used to determine the values of the OPAC suppression check boxes.

Vendor Policies tab

The information in the **Vendor Policies** tab is used whenever an operator uses a vendor of a Vendor Type when creating a purchase order for an item destined for a Location belonging to this Policy Group. The system automatically supplies these values unless the operator defines different default values in the Session Defaults or unless the purchase order uses a vendor account associated with a Location belonging to a Policy Group with different default values. [Figure 2-31](#) shows the **Vendor Policies** tab.

Figure 2-31. New Policy Definitions section, Vendor Policies tab

Field Descriptions

[Table 2-10](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Vendor Policies** tab of the **Acquisitions - Policy Definitions** workspace.

Table 2-10. Fields in the Vendor Policies tab in the Acquisitions - Policy Definitions Workspace

Name	Description	Required	Type and Range
Vendor Type	Default Vendor type on the purchase order, for example, Domestic monographs.	No	Select from list. The Vendor Types are established in System Administration. See Vendor Types on page 2-64 .
Default Order Type	Default purchase order type; for example, approval.	No	The Order Types are established in System Administration. See PO Types on page 2-34 .
Discount %	Default discount percentage for the order.	No	0 - 999
Claim Count	The number of times the line item will be claimed.	No	0 - 999

Table 2-10. Fields in the Vendor Policies tab in the Acquisitions - Policy Definitions Workspace

Name	Description	Required	Type and Range
Claim Interval	Default value providing the amount of time that should elapse before claiming.	No	0 - 999
Cancel Interval	Default value providing the amount of time that should elapse before canceling the order.	No	0 - 999
Ship VIA	Default shipping method.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 20 characters.

Hierarchy Used by Voyager for Canceling a Purchase Order

The system:

1. Checks the line item's Cancel After Interval.
2. Checks the PO's Cancel After Interval.
3. Checks the vendor's Cancel After Interval.
4. Checks the Vendor Type's Cancel Interval.

If Cancel information is blank on all, it doesn't cancel. All canceling is dependent on Pacqjob number 1 being executed, and on generating the cancel from the Problems List or from the PO. See *Voyager's Acquisitions User's Guide* for more information.

Creating a Policy Definition

This section provides step-by-step instructions on how to create a Policy Definition (Acquisitions/Serials Policy Group) in the Acquisitions section of the System Administration module.



Procedure 2-19. Creating a Policy Definition

Use the following to create a Policy Definition.

1. Access the System Administration module's **Acquisitions - Policy Definitions** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Policy Definitions** button in the System listbar.

Result: The **Acquisitions - Policy Definitions** workspace opens.

2. On the **Policy** tab
 - a. Enter the name for your Acquisitions/Serials Policy Group in the **Acq/Serials Policy Group Name** field.
 - b. Select a Duplicate Detection Profile from the drop-down menu (see [Figure 2-32](#)).

The screenshot shows a window titled "New Policy Definition:". It has three tabs: "Policy", "Locations", and "Vendor Policies". The "Policy" tab is active. Inside the tab, there is a text field labeled "Acq/Serials Group Name:" with the text "Biology Acquisitions" entered. Below this is a dropdown menu labeled "Duplicate Detection Profile:" with "OCLCConditional" selected. At the bottom of the window are two buttons: "Save" and "Cancel".

Figure 2-32. Example of a completed Policy tab

3. Click the **Locations** tab
 - a. Select one or more locations from the **Available** (Locations) list box.
 - b. Click the > button to move the location to the **Selected** (Locations) list box.

NOTE:

Use the >> button to select all locations.

Result: The location(s) selected are associated with this Acq/Serials Policy Group.

4. Define the policies for the highlighted location in the **Selected** list box.
 - a. Check the appropriate check boxes to enable wanted features.
 - b. Select from the drop-down menus.

Result: The activities and defaults for a specific location are defined (see [Figure 2-33](#)).

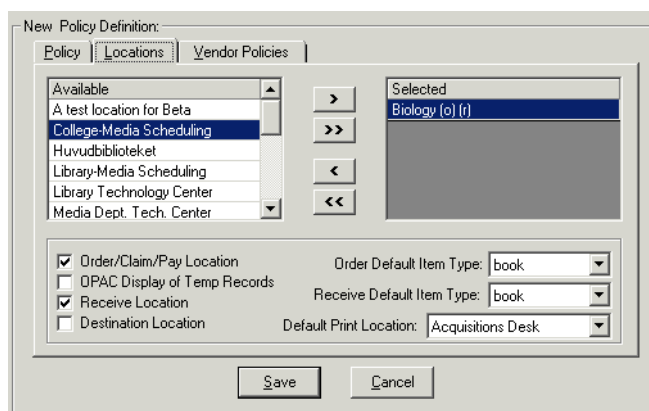


Figure 2-33. Example of a completed location tab

5. Click the **Vendor Policies** tab
 - a. Select the Vendor Type from the **Vendor Type** list box.
 - b. Select the Default Order Type from the **Default Order Type** field.
 - c. Enter the Discount percentage in the **Discount%** field.
 - d. Enter the Claim Count in the **Claim Count** field.
 - e. Enter the Claim Interval in the **Claim Interval** field.
 - f. Enter the Cancel Interval in the **Cancel Interval** field.
 - g. Enter the Ship Via information in the **Ship VIA** field.

Result: The **Vendor Policies** tab is completed (see [Figure 2-34](#)).

The screenshot shows a dialog box titled "New Policy Definition:" with three tabs: "Policy", "Locations", and "Vendor Policies". The "Vendor Policies" tab is active. On the left, there is a list box labeled "Vendor Type" with the following items: Domestic Monographs (selected), Domestic Serials, Foreign Monographs, Foreign Serials, Serials, and Monographs. On the right, there are several input fields: "Default Order Type" is a dropdown menu set to "Approval"; "Discount %" is a numeric field set to 10; "Claim Count" is a numeric field set to 1; "Claim Interval" is a numeric field set to 45; "Cancel Interval" is a numeric field set to 90; and "Ship VIA" is a text field set to "FedEx Ground". At the bottom of the dialog are "Save" and "Cancel" buttons.

Figure 2-34. Example of a completed Vendor Policies tab

6. Click **Save** to save the information or click **Cancel** to return to the **Acquisitions - Policy Definitions** workspace

Result: If saved, the system returns to the **Acquisitions - Policy Definitions** workspace and the new Policy Definition displays in the list of names of Policy Definitions (see [Figure 2-35](#)).

The screenshot shows a workspace titled "Acquisitions - Policy Definitions". It features a list box on the left with the following items: Names, Biology Acquisitions (selected), Main Acquisitions Group, and Other Branch Acquisition Group. To the right of the list box are three buttons: "New", "Edit", and "Delete".

Figure 2-35. Newly-created Policy Definition listed in the Acquisitions - Policy Definition Workspace

Editing a Policy Definition

This section provides step-by-step instructions on how to edit a Policy Definition in the Acquisitions section of the System Administration module.

Sites may edit Policy Definitions.



Procedure 2-20. Editing a Policy Definition

Use the following to edit a Policy Definition.

1. Access the System Administration module's **Acquisitions - Policy Definitions** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Policy Definitions** button in the System listbar.

Result: The **Acquisitions - Policy Definitions** workspace opens.

2. Highlight the Policy Definition to be edited.
3. Click the **Edit** button.

Result: The **Edit Policy Definition** section of the **Acquisitions - Policy Definitions** workspace opens with the **Policy** tab active (see [Figure 2-36](#)).

Figure 2-36 shows the 'Edit Policy Definition' dialog box. The 'Policy' tab is selected. The 'Acq/Serials Group Name' field contains 'Main Acquisitions Group'. The 'Duplicate Detection Profile' dropdown is set to 'OCLCConditional'. The 'Save' and 'Cancel' buttons are at the bottom.

Figure 2-36. Edit Policy Definition section

4. Select the appropriate tab and enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes

Result: If saved, the system returns to the **Acquisitions - Policy Definitions** workspace and the Policy Definition has been edited.

Deleting a Policy Definition

This section provides step-by-step instructions on how to delete a Policy Definition in the Acquisitions section of the System Administration module.

Sites may delete any information at any time. If you delete the entire Policy Group, you should reassign the Locations to another Policy Group.



Procedure 2-21. Deleting a Policy Definition

Use the following to delete a Policy Definition.

1. Access the System Administration module's **Acquisitions - Policy Definitions** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Policy Definitions** button in the System listbar.

Result: The **Acquisitions - Policy Definitions** workspace opens.

2. Highlight the Policy Definition to be deleted.
3. Click the **Delete** button.

Result: The **Delete Policy Definitions** dialog box opens asking for confirmation of the deletion (see [Figure 2-37](#)).

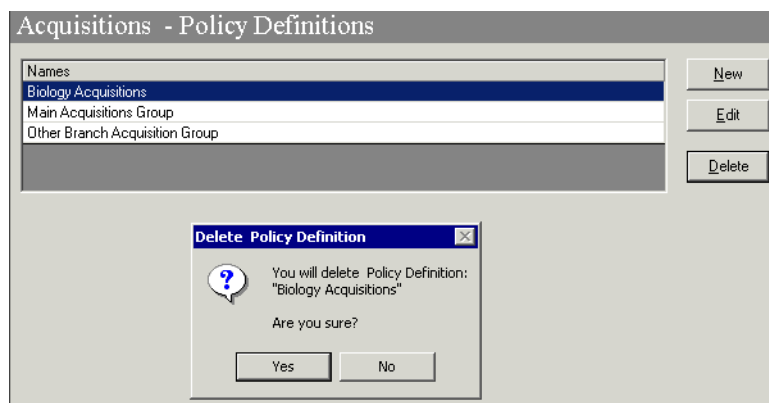


Figure 2-37. Delete Policy Definition confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Policy Definition.

Result: If deleted, the system returns to the **Acquisitions - Policy Definitions** workspace and the Policy Definition is immediately removed from the listing of Policy Definitions.

Vendor Reports

When an operator using the Acquisitions module receives a claim response from a vendor, the claim can be updated. When a claim is updated, an appropriate vendor report is selected from the drop-down menu in the **Vendor Report** field to describe the vendor's response to the claim. Using the Vendor Reports activity in your System Administration module, you can define numerous vendor reports that will be available for use when updating a claim. For more information about updating a claim in the Acquisitions module, see the *Voyager Acquisitions User's Guide*.

Security

Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Vendor Reports** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Acquisitions - Vendor Reports Workspace

Creating, editing, and deleting Vendor Reports is done in the **Acquisitions - Vendor Reports** workspace.

When first entering the **Acquisitions - Vendor Reports** workspace, the top half displays (see [Figure 2-38](#)). It shows the names of any Vendor Reports already defined.

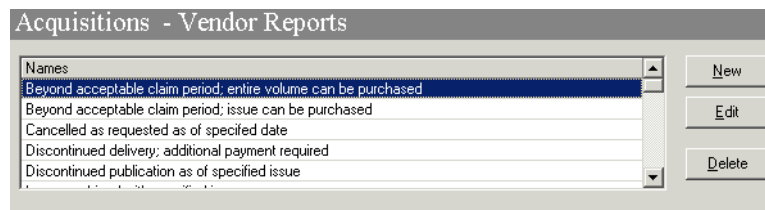


Figure 2-38. Acquisitions - Vendor Reports Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Vendor Reports** workspace opens (see [Figure 2-39](#)). In this example, the fields are blank because the **New** button was selected.

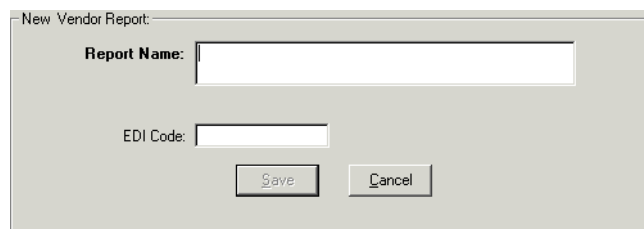
The screenshot shows a dialog box titled "New Vendor Report:". It contains two text input fields: "Report Name:" and "EDI Code:". Below these fields are two buttons: "Save" and "Cancel".

Figure 2-39. Vendor Report section

Field Descriptions

[Table 2-11](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Acquisitions - Vendor Reports** workspace.

Table 2-11. Fields in the Acquisitions - Vendor Reports Workspace

Name	Description	Required	Type and Range
Report Name	Name of any reason or situation that a vendor might specify for an item when responding to a claim. For example: • Not Available • Out of Print • Out of Stock	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 70 characters.
EDI Code	The EDI code describes the vendor's report. For each vendor report there should be a corresponding EDI code. See the <i>EDItEUR Guidelines</i> at http://www.editeur.org and your EDI vendor for more information.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 250 characters.

Creating a Vendor Report

This section provides step-by-step instructions on how to create a Vendor Report in the Acquisitions section of the System Administration module.



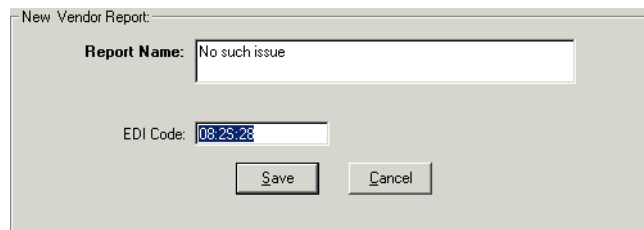
Procedure 2-22. Creating a Vendor Report

Use the following to create a Vendor Report.

1. Access the System Administration module's **Acquisitions - Vendor Reports** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Vendor Reports** button in the System listbar.

Result: The **Acquisitions - Vendor Reports** workspace opens.

2. Enter the name for your Vendor Report in the **Report Name** field.
3. Enter an Electronic Data Interchange Code in the **EDI Code** field (see [Figure 2-40](#)).



The screenshot shows a 'New Vendor Report' dialog box. It has two text input fields: 'Report Name' with the value 'No such issue' and 'EDI Code' with the value '082528'. Below the fields are two buttons: 'Save' and 'Cancel'.

Figure 2-40. Example of a completed Vendor Reports section

4. Click **Save** to save the information or click **Cancel** to return to the **Acquisitions - Vendor Reports** workspace

Result: If saved, the system returns to the **Acquisitions - Vendor Reports** workspace and the new Vendor Report displays in the list of Vendor Reports.

Editing a Vendor Report

This section provides step-by-step instructions on how to edit a Vendor Report in the Acquisitions section of the System Administration module.

Sites may edit Vendor Reports. If you change an existing Vendor Report, that change will be reflected on any existing claims that are associated with the vendor report.



Procedure 2-23. Editing a Vendor Report

Use the following to edit a Vendor Report.

1. Access the System Administration module's **Acquisitions - Vendor Reports** workspace.
 - a. Click **Acquisitions** in the listbar.

- b. Click the **Vendor Reports** button in the System listbar.

Result: The **Acquisitions - Vendor Reports** workspace opens.

2. Highlight the Vendor Report to be edited.
3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes

Result: If saved, the system returns to the **Acquisitions - Vendor Reports** workspace and the Vendor Report has been edited.

Deleting a Vendor Report

This section provides step-by-step instructions on how to delete a Vendor Report in the Acquisitions section of the System Administration module.

Sites may delete Vendor Reports, if the Vendor Report is not in use. Once a Vendor Report has been used, the Vendor Report cannot be deleted until all claims with that Vendor Report definition have been removed from the claims listing. When attempting to delete a Vendor Report that is in use, a message displays saying why it cannot be deleted. An example of one such message is in [Figure 2-41](#).

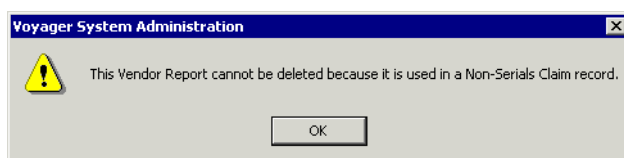


Figure 2-41. Message when the Vendor Report Is in Use and Cannot Be Deleted



Procedure 2-24. Deleting a Vendor Report

Use the following to delete a Vendor Report.

1. Access the System Administration module's **Acquisitions - Vendor Reports** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Vendor Reports** button in the System listbar.

Result: The **Acquisitions - Vendor Reports** workspace opens.

2. Highlight the Vendor Report to be deleted.
3. Click the **Delete** button.

Result: The **Delete Vendor Reports** dialog box opens asking for confirmation of the deletion (see [Figure 2-42](#)).

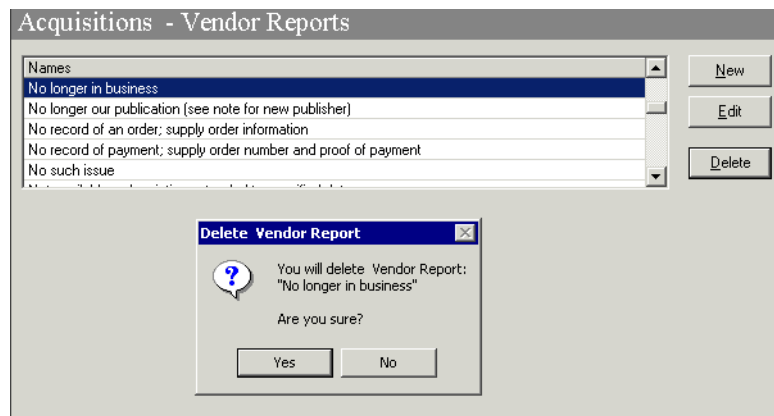


Figure 2-42. Delete Vendor Report Confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Vendor Report.

Result: If deleted, the system returns to the **Acquisitions - Vendor Reports** workspace and the Vendor Report is immediately removed from the listing of Vendor Reports.

Vendor Types

Vendor Types help to group individual vendor records by basic characteristics important to your library. There is no Voyager-specified limit to the number of Vendor Types you can define. If your library uses only a few vendors, you may have only one Vendor Type. You must have at least one.

You define a set of values for Vendor Types for each Acquisitions/Serials Policy Group. These values will be used by a batch job on the server to update line items on purchase orders associated with a particular vendor type. For more information, see [Vendor Policies tab](#) on [page 2-50](#).

Security

Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Vendor Types** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Acquisitions - Vendor Types Workspace

Creating, editing, and deleting Vendor Types is done in the **Acquisitions - Vendor Types** workspace.

When first entering the **Acquisitions - Vendor Types** workspace, the top half displays (see [Figure 2-43](#)). It shows the names of any Vendor Types already defined.

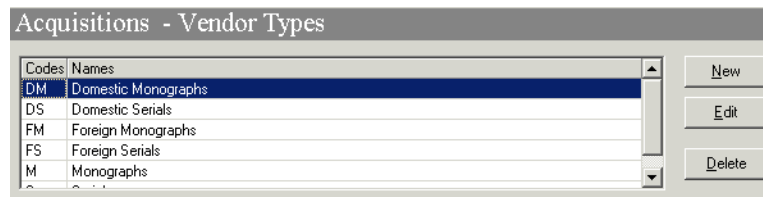


Figure 2-43. Acquisitions - Vendor Types Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Vendor Types** workspace opens (see [Figure 2-44](#)). In this example, the fields are blank because the **New** button was selected.

The screenshot shows a dialog box titled "New Vendor Type:". It contains two input fields:

- Vendor Type Code:** A small text input field.
- Vendor Type Name:** A larger text input field.

At the bottom of the dialog are two buttons: "Save" and "Cancel".

Figure 2-44. New Vendor Type Section

Field Descriptions

[Table 2-12](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Acquisitions - Vendor Types** workspace.

Table 2-12. Fields in the Acquisitions - Vendor Types Workspace

Name	Description	Required	Type and Range
Vendor Type Code	Code associated with the Vendor Type Vendor Type Codes are displayed in vendor records seen by staff.  TIP: <i>Mnemonic codes are generally considered more user-friendly and easier to recognize than more arbitrary or numeric codes.</i>	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 2 characters.
Vendor Type Name	Review what default values are defined for a Vendor Type to help you decide how many types you should define. These defaults are defined at the Acquisitions/Serials Policy Group level so that different order units may share vendor records but reflect their own experience with that vendor by defining their own defaults.	Yes You must define at least one Vendor Type.	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 40 characters.

Creating a Vendor Type

This section provides step-by-step instructions on how to create a Vendor Type in the Acquisitions section of the System Administration module.



Procedure 2-25. Creating a Vendor Type

Use the following to create a Vendor Type:

1. Access the System Administration module's **Acquisitions - Vendor Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Vendor Types** button in the System listbar.

Result: The **Acquisitions - Vendor Types** workspace opens.

2. Enter the Vendor Code in the **Vendor Type Code** field.
3. Enter the name of your Vendor Type in the **Vendor Type Name** field (see [Figure 2-45](#)).

Figure 2-45. Example of a completed Vendor Type Section

4. Click **Save** to save the information or click **Cancel** to return to the **Acquisitions - Vendor Types** workspace.

Result: If saved, the system returns to the **Acquisitions - Vendor Types** workspace and the new Vendor Type displays alphabetically in the list of Vendor Types.

Editing a Vendor Type

This section provides step-by-step instructions on how to edit a Vendor Type in the Acquisitions section of the System Administration module.

Sites can change any or all information about a Vendor Type or add new ones.

If you change an existing Vendor Type already in use, the change is reflected in all vendor records assigned to that Vendor Type.



Procedure 2-26. Editing a Vendor Type

Use the following to edit a Vendor Type.

1. Access the System Administration module's **Acquisitions - Vendor Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Vendor Types** button in the System listbar.

Result: The **Acquisitions - Vendor Types** workspace opens.

2. Highlight the Vendor Type to be edited.
3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes

Result: If saved, the system returns to the **Acquisitions - Vendor Types** workspace and the Vendor Type has been edited.

Deleting a Vendor Type

This section provides step-by-step instructions on how to delete a Vendor Types in the Acquisitions section of the System Administration module.

Once a vendor type is assigned to a vendor record, you cannot delete the Vendor Type.



Procedure 2-27. Deleting a Vendor Type

Use the following to delete a Vendor Type.

1. Access the System Administration module's **Acquisitions - Vendor Types** workspace.
 - a. Click **Acquisitions** in the listbar.
 - b. Click the **Vendor Types** button in the System listbar.

Result: The **Acquisitions - Vendor Types** workspace opens.

2. Highlight the Vendor Type to be deleted.
3. Click the **Delete** button.

Result: The **Delete Vendor Types** dialog box opens asking for confirmation of the deletion (see [Figure 2-46](#)).

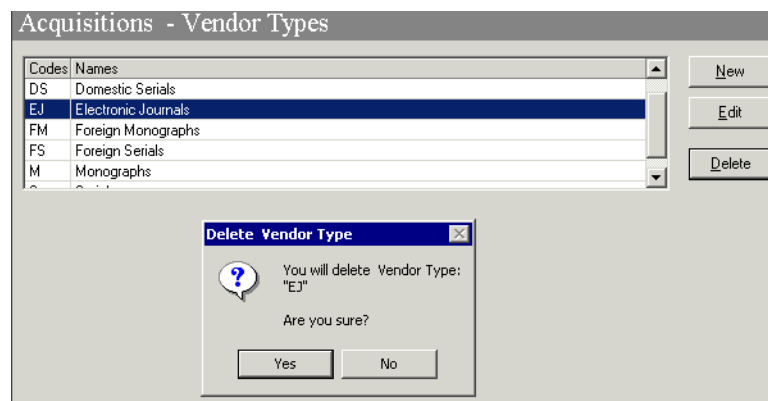


Figure 2-46. Delete Vendor Types Confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Vendor Type.

If deleted, the system returns to the **Acquisitions - Vendor Types** workspace and the Vendor Type is immediately removed from the listing of Vendor Types.

Introduction

Call slips are used or necessary when materials are not directly accessible by patrons. This may be the case for materials located in an institution's closed stacks, for example. Parameters in Voyager System Administration Call Slips can be set to enable call slip processing for requesting materials.

The Voyager System Administration Call Slips section is one component of the setup required for processing call slips. The following is a description of what you need to do in order to tailor the Voyager system for processing call slip requests.

- Complete the setup for call slips in the Call Slips section of Voyager System Administration.
- Complete the setup steps in the Call Slip Dæmon module. See the *Voyager Call Slip Dæmon Implementation & User's Guide* for more information.
- Create a call slip request form and configure it in the OPAC Configuration section of Voyager System Administration.

Upon completion of the system setup, call slips are created or initiated by a request submitted through WebVoyáge or through the Circulation module. The item that a patron is able to request is based on the rules set in the Circulation Policy Matrix defined in Voyager System Administration.

Purpose

The purpose of this chapter is to describe the setup required in the Call Slips section of Voyager System Administration for processing call slips. There are three components of call slip setup within the Call Slips section.

- No-Fill Reasons
- Rules
- Queues

No-Fill Reasons

When a call slip request cannot be filled, a reason needs to be provided indicating why it cannot be filled. The No-Fill Reasons component of Call Slips allows you to create a list of possible No-Fill Reasons. These reasons display in a list that the call slip operator can select from when processing call slip requests. A minimum of one No-Fill Reason is required.

Creating No-Fill Reasons

Use the following [Procedure 3-1, Creating No-Fill Reasons](#), to create No-Fill Reasons for call slips.



Procedure 3-1. Creating No-Fill Reasons

1. Click **Call Slips** on the vertical listbar.

Result: The Voyager System Administration **Call Slips** main dialog box opens.

2. Click **No-Fill Reasons**.

Result: The **Call Slips - No-Fill Reasons** main dialog box opens. See [Figure 3-1](#).

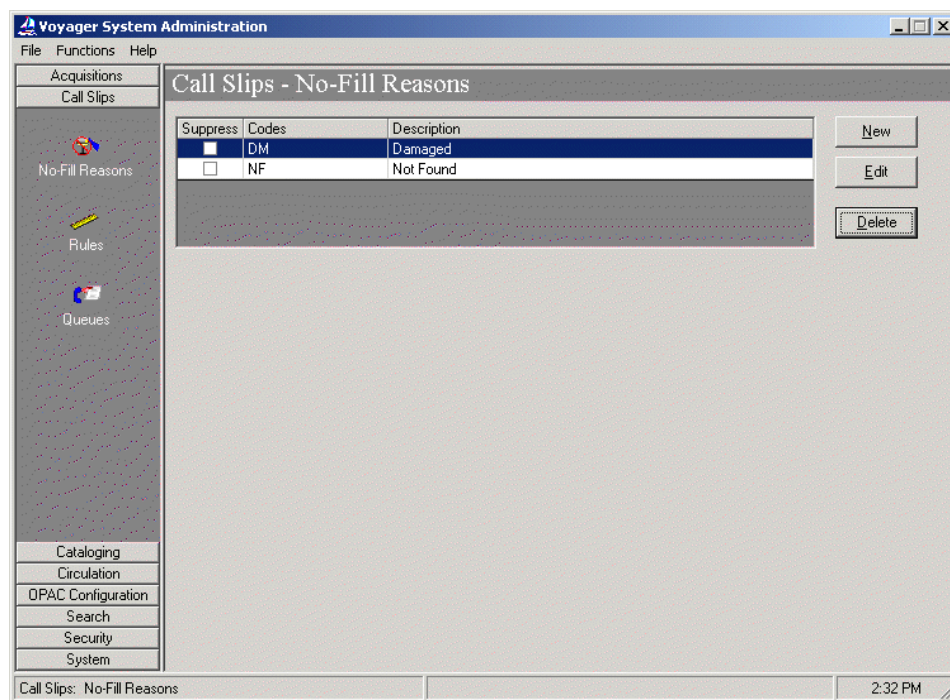


Figure 3-1. Call Slips - No-Fill Reasons main dialog box

3. Click **New**.

Result: The **Call Slips - No-Fill Reasons** options open. See [Figure 3-2](#).

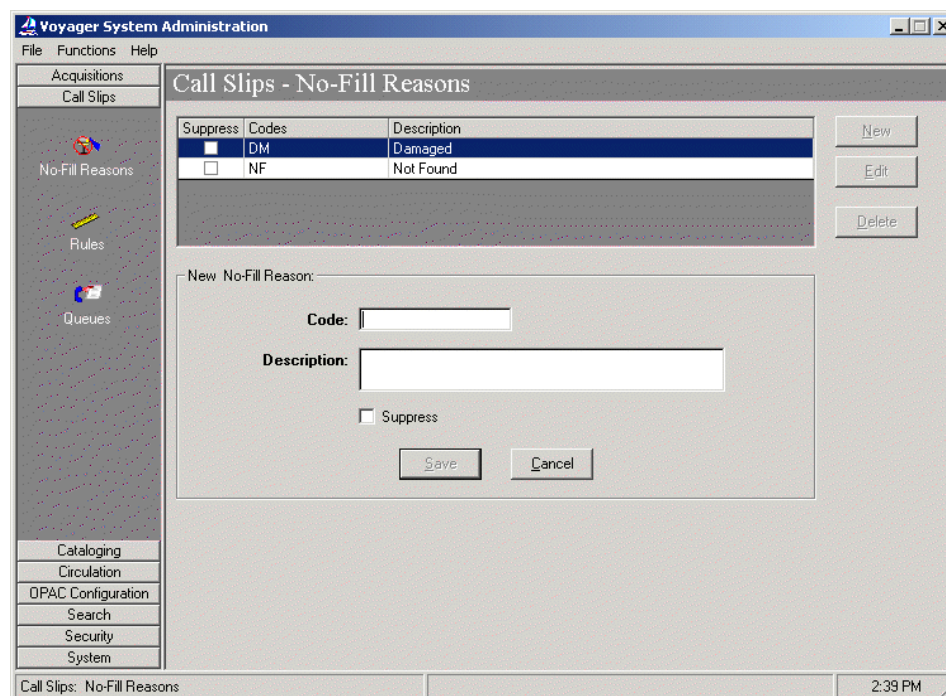


Figure 3-2. No-Fill Reasons options

4. Enter the **Code**, **Description**, and **Suppress** information that matches your preferences. See [Table 3-1](#) for an explanation of each field.

Result: This completes the **No-Fill Reasons** component of **Call Slips** configuration.

Table 3-1. No-Fill Reasons fields explanation

Option	Description
Code	Enter a unique name up to 10 characters in length that identifies the No-Fill Reason. Making the first letter of the code unique enables the call slip operator to select the code by keying only the first letter.
Description	Enter a description up to 40 characters in length of the No-Fill Reason. The Description displays in WebVoyáge to inform the requester why the call slip request was not filled.

Table 3-1. No-Fill Reasons fields explanation

Option	Description
Suppress	Select this option to prevent the No-Fill Reason from displaying in the list of reasons from which the call slip operator makes a selection. NOTE: No-Fill Reasons may not be deleted if they are in use. Use the Suppress option to keep the No-Fill Reason from displaying in the list of No-Fill Reasons from which the call slip operator selects.

- Click **Save** or click **Cancel**.

Result: This saves or cancels the No-Fill Reason.

Rules

Call Slip Rules indicate where certain kinds of closed stacks requests are to be routed. You can select Print Groups to be the location for items that are:

- Published between certain dates
- Within a range of call numbers
- Items at a certain location
- Items of a certain type

If a closed stacks request matches a particular rule, it is routed to the Call Slip Print Group listed on the rule.

Call slip rules are listed in order of importance. If there is a rule which should take precedence over another, it must display earlier in the list.

An item record has to exactly match all of the details specified for the rule in order for the rule to apply to that record. If the record does match a rule, then the record is sent to the call slip print group specified in the rule. If a record matches none of the rules, then it is sent to the default print group. Blank fields are ignored.



TIP:

When planning and setting up Call Slip policies, the following should be considered: If the Call Slip Item Required check box is not selected and no item records exist in the holdings for a record displayed in WebVoyage, the

patron is allowed to submit a request that is not linked to an item, only if, at least one of the holdings locations associated with the bibliographic record is defined in Call Slip Rules in Voyager System Administration.

Creating Rules

Use the following [Procedure 3-2, Creating Rules](#)," to create Rules for call slips.



Procedure 3-2. Creating Rules

1. Click **Call Slips** on the vertical listbar.

Result: The Voyager System Administration **Call Slips** main dialog box opens.

2. Click **Rules**.

Result: The **Call Slips - Rules** main dialog box opens. See [Figure 3-3](#).

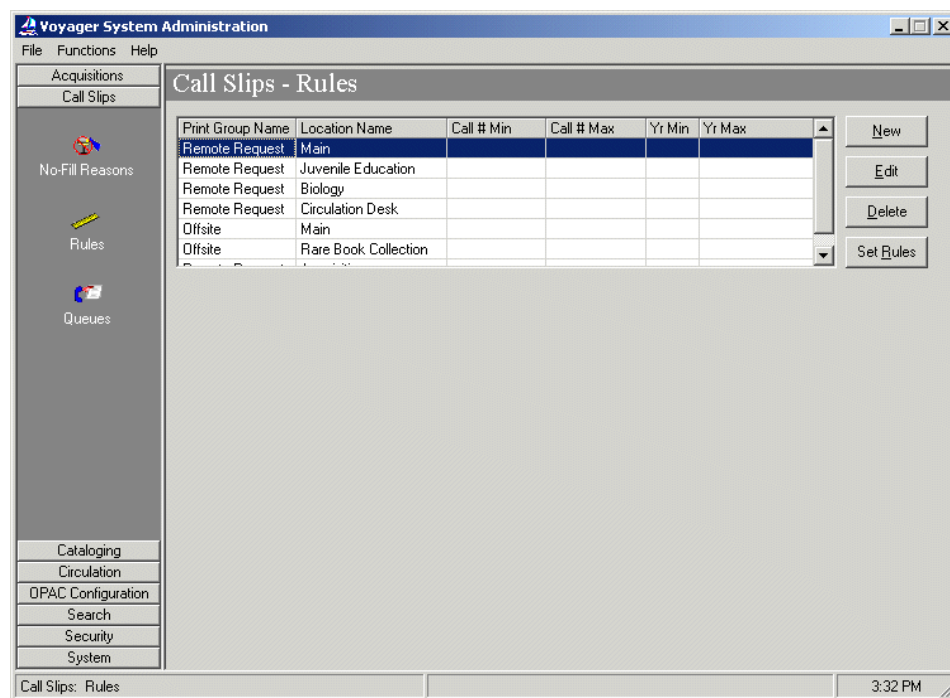


Figure 3-3. Call Slips - Rules main dialog box

If no Queues have been defined, the **Call Slips - Rules** main dialog box opens as in [Figure 3-4](#).

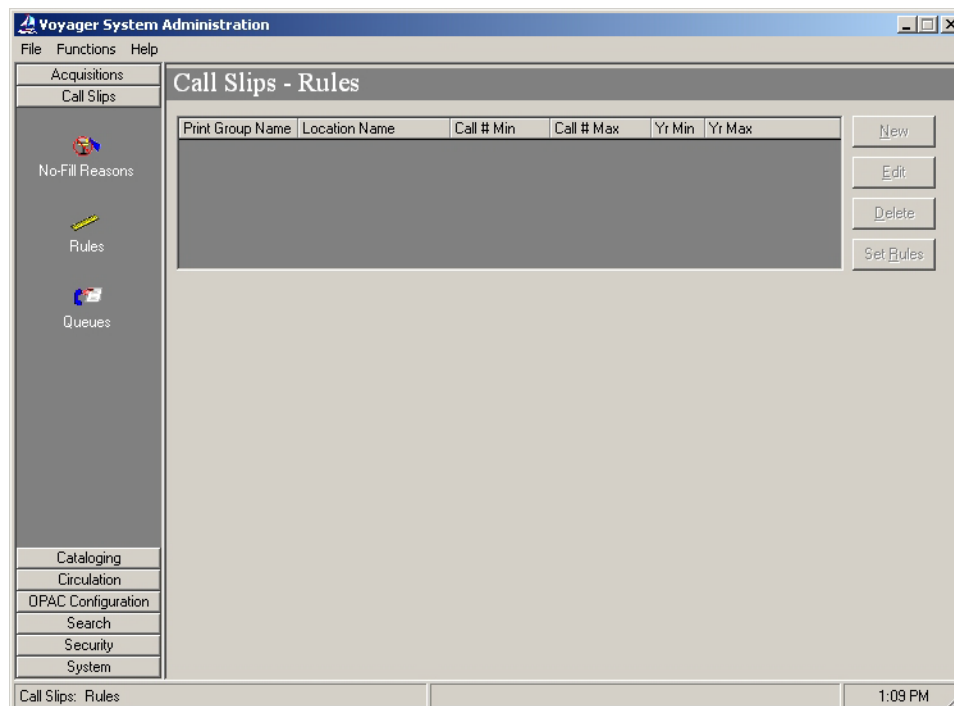


Figure 3-4. Call Slips - Rules main dialog box (no Queues defined)



IMPORTANT:

Call Slips - Queues must be defined before Call Slips - Rules can be created.

3. Click **New**.

Result: The **New Call Slips - Rules** options open. See [Figure 3-5](#).

Voyager System Administration

File Functions Help

Acquisitions
Call Slips

No-Fill Reasons
Rules
Queues

Cataloging
Circulation
OPAC Configuration
Search
Security
System

Call Slips - Rules

Print Group Name	Location Name	Call # Min	Call # Max	Yr Min	Yr Max
Remote Request	Main				
Remote Request	Juvenile Education				
Remote Request	Biology				
Remote Request	Circulation Desk				
Offsite	Main				
Offsite	Rare Book Collection				

New
Edit
Delete
Set Rules

New Rule:

Print Group: Auto Charge Test Holdings Location:

Call Number Type:

Call Number Min (>=) Call Number Max (<)

Item Location: Temporary Location:

Item Type: Temporary Item Type:

Year Min (>=) Year Max (<)

Save Cancel

Call Slips: Rules 3:45 PM

Figure 3-5. Call Slips - Rules options

4. Enter the **New Call Slips - Rules** options to match your requirements. See [Table 3-2](#) for a description of the available **New Call Slips - Rules** options.

Result: This completes the definition of **New Call Slips - Rules**.

Table 3-2. Call Slips - Rules options

Option	Description
Print Group	Select the Print Group to which the call slip message is to be routed. NOTE: Print Groups are defined in Call Slips - Queues . For more information, see Queues on page 3-14 .
Holdings Location	Select a location that contains holdings records with the required call slip rules applied.

Table 3-2. Call Slips - Rules options

Option	Description
Call Number Type	(Optional) Use Call Number Type in combination with Call Number Min (>=) and Call Number Max (<) to identify a range of call numbers or call numbers above or below a certain value in holdings records for the rule being defined. Example: If all of the Library of Congress call numbers in the K's should be selected for a rule, enter Library of Congress as the call number type and a call number minimum of K and call number maximum of L. If the collection is split at a more arbitrary point, such as the first book at the second location has call number LB101.A323, you may have two rules: • one with a minimum of A and a maximum of LB101.A323 • a second with a minimum of LB101.A323 and no maximum entered NOTE: When deciding what holding records fall under a certain rule, Voyager looks for holding records with call numbers equal to or greater than the number entered into the Call Number Min (>=) field and less than (but not equal to) the number in the Call Number Max (<) field. Select, for this field, the call number type to match your requirements.
Call Number Min (>=)	(Optional) Enter the minimum or equal to call number value in this field that matches your requirements. For more information, see also the description for Call Number Type .
Call Number Max (<)	(Optional) Enter the maximum call number value in this field that matches your requirements. For more information, see also the description for Call Number Type .
Item Location	(Optional) Select the location where the item must be stored for the rule to apply.

Table 3-2. Call Slips - Rules options

Option	Description
Temporary Location	(Optional) Select the location where the item must be temporarily stored for the rule to apply. NOTE: If both the Item Location and the Temporary Location are set, the item record must match exactly. Example: If you have some items permanently located and some temporarily located in a closed stacks location and you want to route all of these to the same places, you need two rules: one for items located permanently in closed stacks and one for items located temporarily in closed stacks, and route them both to the same print group location. Adding one rule that lists both temporary and permanent locations as closed stacks does not do the same thing.
Item Type	(Optional) Select the type of item to which this rule is to be applied.
Temporary Item Type	(Optional) Select the temporary item type to which this rule is to be applied. NOTE: If both the Item Type and the Temporary Item Type are set, the item record must match exactly.
Year Min (>=)	(Optional) Enter a minimum year or equal to year value in this field.

Table 3-2. Call Slips - Rules options

Option	Description
Year Max (<)	(Optional) Enter a maximum year value in this field. NOTE: The date that Voyager is examining is actually the contents of the year field as it is in the item record. It is a 20-character alphanumeric string and is useful for serial collections where older issues may be sent to storage by date. It must exactly match the beginning of the number entered in the fields. Voyager sequentially compares each letter in each string in the date field in the records. Example: If a record has a date of 1965, and the minimum date is 1965, it is considered a match because each record contains the same exact string of text, the 1965 part. If the date in the record is 1965-66, or even 19657648, it is a match. If the date in the record is 65, however, it is not recognized as a match.

5. Click **Save** or click **Cancel**.

Result: This adds the rule to the to the list of **Call Slips - Rules** or cancels any options that you may have selected.

Rules Sort Order

Once you have created a new call slip rule (and there is more than one rule), you can set the order in which the rules are processed. See [Procedure 3-3, Setting Rules Sort Order](#)", for more information.



Procedure 3-3. Setting Rules Sort Order

Use the following to set the sort order for the call slip rules that have been created.

1. Click **Call Slips** on the vertical listbar.

Result: The Voyager System Administration **Call Slips** main dialog box opens.

2. Click **Rules**.

Result: The **Call Slips - Rules** main dialog box opens. See [Figure 3-3](#).

3. Click the **Set Rules** button.

Result: The **Sort Call Slips - Rules** dialog box opens. See [Figure 3-6](#).

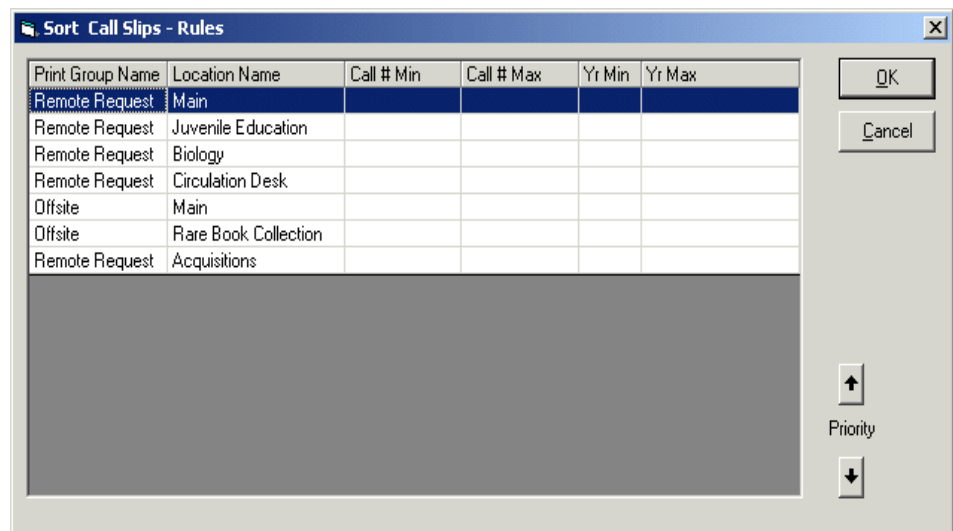


Figure 3-6. Set call slip rules sort order

4. Use the up/down arrow buttons to prioritize the order of the rules in the **Call Slips - Rules** list.

Result: This identifies which rule should take precedence over another rule.

5. Click **OK** or **Cancel**.

Result: This saves or cancels the changes made to the sort order of the call slip rules.

Queues

In Call Slips - Queues within the System Administration module, you can specify where call slip requests are to be directed for processing and other characteristics of processing call slips. More specifically, call slip requests are directed to print queues that are associated with a defined location and can be processed through the Call Slip Dæmon module.

Example:

You may have two separate closed stacks areas such as East and West, for example, that are in different parts of the building and deliver items to a central pickup desk. You can specify that all call slip requests for items in the West area can be directed to the West queue and also that all requests for items in the East area can be directed to the East queue.

When call slips are submitted, they are automatically placed in one call slip queue or another depending on which specifications apply to them. Additionally, the queue definition can specify the pickup location which also determines if the item needs to be routed to another desk/location.

Creating Queues

Use the following [Procedure 3-4, Creating Queues](#), to create queues for call slips.



Procedure 3-4. Creating Queues

1. Click **Call Slips** on the vertical listbar.

Result: The Voyager System Administration **Call Slips** main dialog box opens.

2. Click **Queues**.

Result: The **Call Slips - Queues** main dialog box opens. See [Figure 3-7](#).

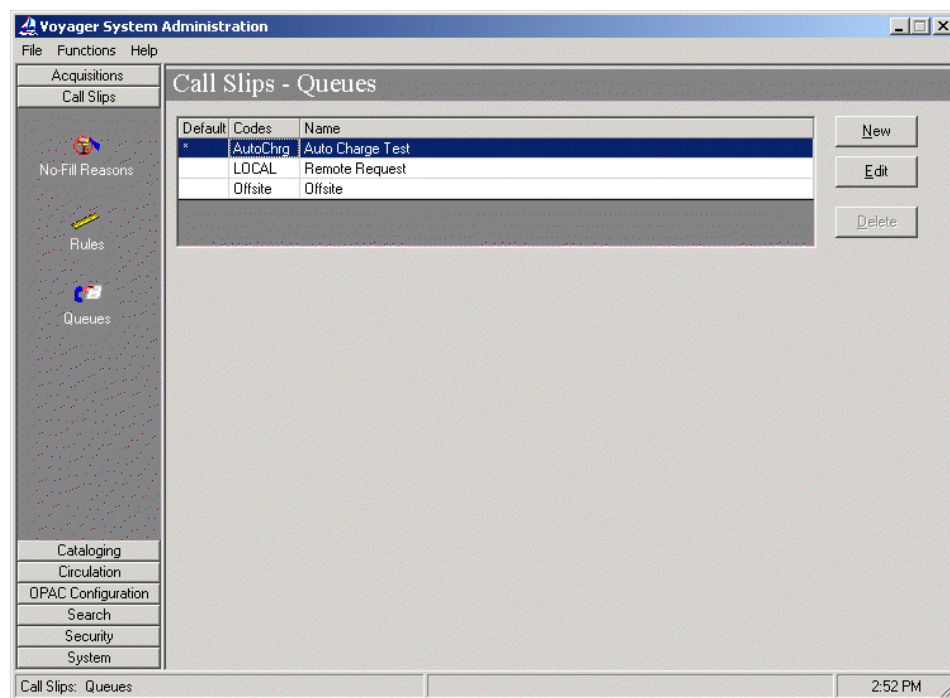


Figure 3-7. Call Slips - Queues main dialog box

3. Click **New**.

Result: The **Call Slips - Queues Group** tab options open. See [Figure 3-8](#).

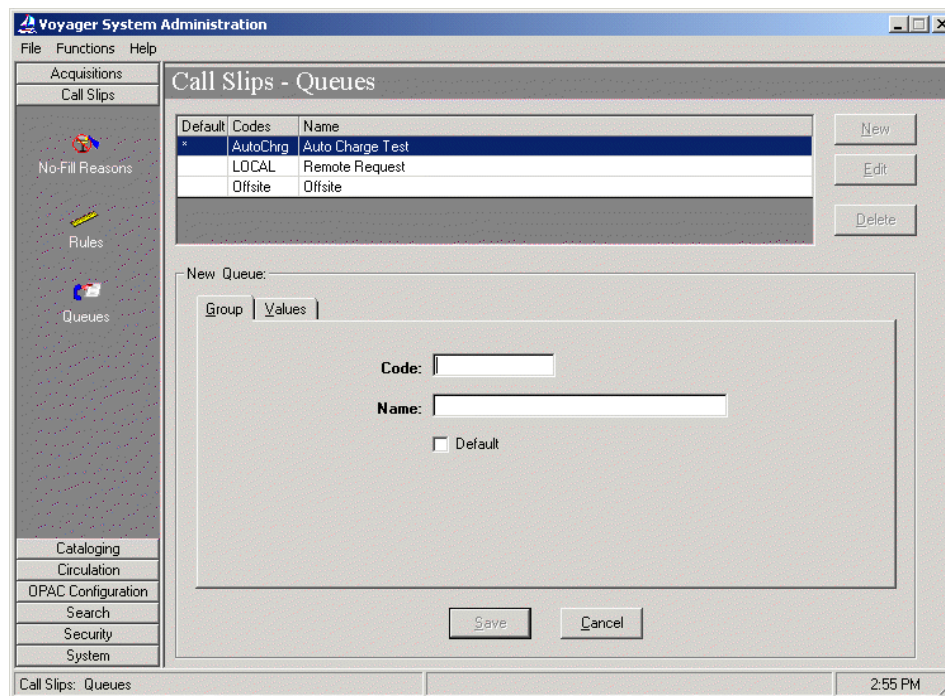


Figure 3-8. Call Slips - Queues Group tab

4. Enter the **Code**, **Name**, and **Default** options to match your preferences. See [Table 3-3](#) for more information about these options.

Result: This completes the **Group** tab component of the **Call Slips - Queues** definition.

Table 3-3. Call Slips - Queues Group tab options

Option	Description
Code	Enter the Code for the call slip queue, up to 10 alphanumeric characters in length.
Name	Enter the Name for the call slip queue, up to 25 alphanumeric characters in length.

Table 3-3. Call Slips - Queues Group tab options

Option	Description
Default	Check the Default box to make this call slip queue the default. NOTE: Any call slip requests that do not match any of the other call slip queue definitions are sent to the queue which is identified as the Default.

- Click the **Values** tab.

Result: This displays the **Values** tab options. See [Figure 3-9](#).

Figure 3-9. Call Slips - Queues Values tab

- Enter the **New Queue** options to match your requirements. See [Table 3-4](#) for a description of the available **New Queue** options.

Result: This completes the definition of a **New Queue**.

Table 3-4. Call Slips - Queues Values tab options

Option	Description
Autocharge to requesting patron	Select this option to have Voyager automatically charge out the item to the patron submitting the call slip request at the moment when the Process button is clicked in the Call Slip Dæmon module. Use this option for situations where the requested item from the stacks is handed directly to the patron versus going through a circulation desk.
Place "On Hold" shelf	Select this option to specify that the requested item is to be delivered to the desk maintaining the On Hold shelf.
"In Transit for Hold" to destination location	Select this option to indicate that the item is given a status of In Transit while it is transferred to the Hold Desk. When it arrives at the Hold Desk, it is discharged and placed on the Hold Shelf. NOTE: This option must be selected to enable the Pick Up At field (that allows patrons to specify a pickup location for items requested through a call slip) on the WebVoyage and Circulation call slip request forms. All call slip queue definitions must have this option selected in order for the Pick Up At field to work.
Set circulation review status on new item	Select this option to require that any new items created in the Call Slip Dæmon module be assigned a status of Circulation Review when viewed in the Circulation module. The next time the item is to be discharged it is flagged for review before it is charged again.
Set cataloging review status on new item	Select this option to require that any new items created in the Call Slip Dæmon module be assigned a status of Cataloging Review when viewed in the Cataloging module. The next time the item is to be discharged, it is flagged for review before it is charged again.
Include patron info in call slip display	Select this option to indicate that you want to include the patron's name and barcode on the call slip display when the request is processed.

Table 3-4. Call Slips - Queues Values tab options

Option	Description
Location	Select the Location to where the item is to be delivered after it is retrieved from the stacks.
Default Item Type	Select the Default Item Type to identify the default that is used when creating a new item in order to fulfill a call slip request.
Archive Period	Enter the Archive Period of time by entering a number in the first field and selecting the appropriate unit of time (Days, Hours, Minutes) in the second field. Use the Archive Period to specify the length of time that a filled, not filled, or expired request is displayed in WebVoyage. After the Archive Period of time has passed, the call slip requests are archived by the Circulation batch job. If the Archive Period is set to zero (0), call slip requests are archived immediately.
Expire period	Enter the Expire period of time by entering a number in the first field and selecting the appropriate unit of time (Days, Hours, Minutes) in the second field. This sets the length of time that must pass before a call slip request that is not processed or marked with a no-fill reason is assigned a status of Expired by the Circulation batch job. If this option is set to zero (0), call slip requests never expire.

7. Click **Save** or click **Cancel**.

Result: This saves or cancels the **New Queue** definition.

Introduction

Cataloging options in Voyager System Administration are designed to provide you with alternatives for defining the following components:

- Authority Duplicate Detection Profiles
- Bibliographic Duplicate Detection Profiles
- Bulk Import Rules
- Call Number Hierarchy
- Cataloging Policy Definition

These components determine how imported records are processed into your database and how records added through the Cataloging module are processed.

Purpose of this Chapter

The purpose of this chapter is to define the Cataloging import options available in the Voyager System Administration client.

Authority Duplicate Detection Profiles

When importing authority records or entering them online from the Cataloging module, Voyager uses Authority Duplicate Detection Profiles to determine how the system should handle the incoming record(s).

You can create profiles to do the following:

- Add a record to the database.
- Add a record if it does not match anything in the database.
- Replace a matching record in the database with a new record.
- Merge the contents of the new record with the record in the database.
- Define GDC duplicate handling to be used in the GDC Auth Load Match configuration (for authority loading with GDC)

You need to establish at least one profile so that the system is able to process imported records and records entered online from the Cataloging module.

When records are being bulk imported or entered online and an Authority Duplicate Detection Profile is used, the system compares each record with the specified profile. Each record is ranked by how well it matches against the other records in the database. You can specify exactly what fields in the record the profile compares and which fields are to be given priority over others in order to determine the quality of the match.

Creating Authority Duplicate Detection Profile

Use the following to create an Authority Duplicate Detection Profile.



Procedure 4-1. Creating Authority Duplicate Detection Profile

1. Click **Cataloging** on the vertical taskbar.

Result: The Voyager System Administration cataloging options open. See [Figure 4-1](#).

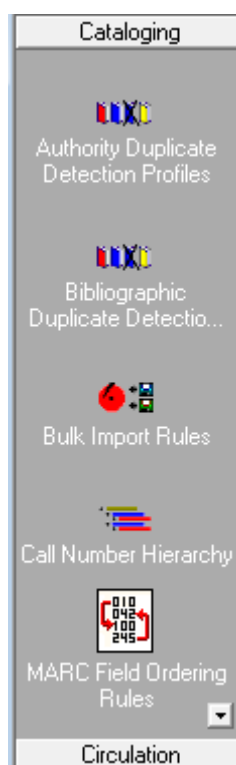


Figure 4-1. Cataloging taskbar options

2. Click **Authority Duplicate Detection Profiles**.

Result: The **Cataloging - Authority Duplicate Detection Profiles** dialog box opens. See [Figure 4-2](#).

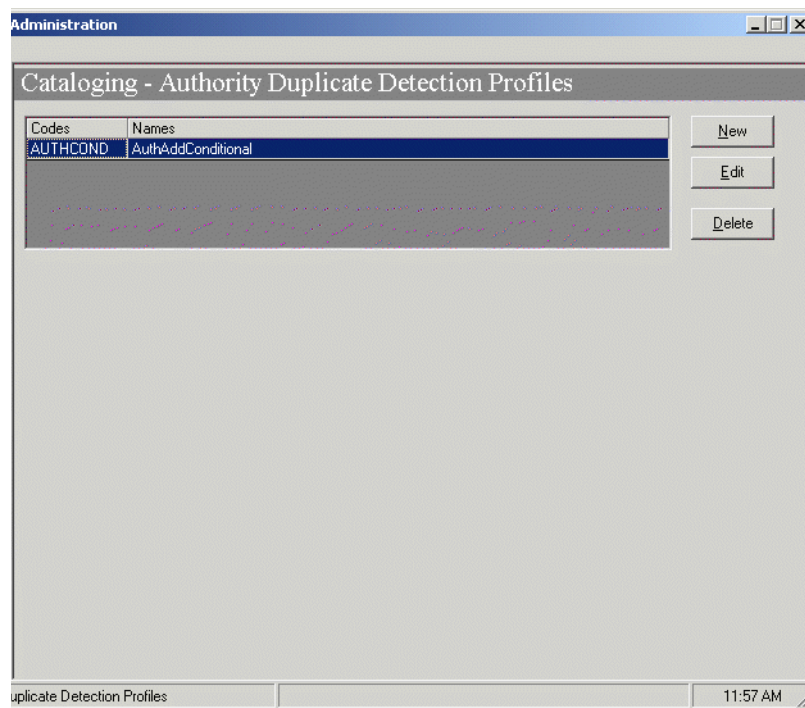


Figure 4-2. Cataloging - Authority Duplicate Detection Profiles

3. Click **New**.

Result: The **New Authority Duplicate Detection Profile** options open. See [Figure 4-3](#).

Cataloging - Authority Duplicate Detection Profiles

Codes	Names
AMATCH	GDC Auth Match
AUTH1	GDC Auth Test
AUTHCOND	AuthAddConditional
AUTHREP	AuthReplace
AUTHUNC	AuthAddUnconditional

New Authority Duplicate Detection Profile: _____

Profile | Field Definitions

Profile Name: _____ Profile Code: _____

Duplicate Handling:

☒ Add-Unconditional ☐ Replace ☐ Add-Conditional ☐ Merge ☐ GDC

Cancellation:

☒ None ☐ OCLC ☐ RLIN

Duplicate Replace: 100 Duplicate Warn: 100

Save Cancel

Figure 4-3. Authority Duplicate Detection Profile options

4. Enter the options on the **Profile** tab to match your requirements. See [Table 4-1](#) for a description of available options on the **Profile** tab.

Result: This completes one part of the setup for an **Authority Duplicate Detection Profile**.

Table 4-1. Profile tab options - Authority Duplicate Detection

Options	Description
Profile Name	25-character maximum length (alphanumeric, punctuation, and spaces). Mixed case may be used for alpha characters.
Profile Code	8-character maximum length. Mixed case may be used for alpha characters. Each Profile Code must be unique for all Cataloging Policy Groups.

Table 4-1. Profile tab options - Authority Duplicate Detection

Options	Description
Duplicate Handling	Add-Unconditional. Specifies that any incoming record is added to the Voyager database even if a duplicate(s) is detected. Replace. Specifies that when an incoming record matches an existing Voyager record, the incoming record replaces the Voyager record (if the quality of the incoming record meets or surpasses the values specified for Duplicate Warn/Replace and Field Weight) and retains the Voyager record number. If the system does not find a match, the incoming record is added to the database. If more than one existing record is matched (duplicate authority records in the database), the system does not replace any record and the imported record is written to the discard file. When entering records from the Cataloging module and duplicates occur, you are given the opportunity to view the records affected. Add-Conditional. During bulk import operations, any incoming record is added to your Voyager database unless a duplicate(s) is detected. If a duplicate(s) is detected, the system does not replace any record and the imported record is written to the discard file. When entering records from the Cataloging module and duplicates occur, you are given the opportunity to view the records affected. Merge. During bulk import operations, any incoming record is added to your Voyager database unless a duplicate is detected. If a duplicate is detected, the system copies information in specified fields (identified on the Merge Fields tab) from the existing record to the new record which is then written to the database. The old record is moved to the deleted file. GDC. Specifies the field definitions to be used in GDC authority load matching (Authority Loading > Load Match Configuration) for deduplicating incoming MARC records against the existing Voyager authorities database. Refer to the <i>Voyager Global Data Change</i> guide for more information. Duplicate detection profiles with GDC selected in the Duplicate Handling section are the only profiles that can be selected in the GDC Auth Load Match configuration. NOTE: There are many components involved in the processing of records and Duplicate Handling. For more information about the logic in duplicate detection processing, files created and appended, deleted, discarded, replaced records, and so forth, see Authority Record Duplicate Detection Processing on page 4-15, Profile Options and Duplicate Detection on page 4-15, BulkImport Versus Online Entry on page 4-16, and Files Affected By Duplicate Detection Processing on page 4-19.

Table 4-1. Profile tab options - Authority Duplicate Detection

Options	Description
Discard incoming records that do not match existing records	Select this option to indicate when Replace or Merge are chosen as Duplicate Handling methods, incoming records are to be discarded when they do not match existing records during bulk import. The default is to add incoming records to the database when there is no match.
Cancellation	Use the OCLC or RLIN options to override any of the choices selected for Duplicate Handling. None. Select None if the Profile is to be used for records from any other source; if you do not care about the existence of a cancellation/delete code in either an OCLC or an RLIN record; or if the source does not use a cancellation/delete code in its records. OCLC. Select OCLC if the Profile is to be used for records imported from OCLC and you want to check for the presence of 03 in byte position 22 of the OCLC record leader and do not under any circumstances want to load such a record into your database. RLIN. Select RLIN if the Profile is to be used for records imported from RLIN and you want to check for the presence of d in field 090 subfield i of the record and do not under any circumstances want to load such a record into your database.
Duplicate Replace	Enter a numeric value from 1 to 100. This is the level at or above which a single match may be automatically replaced or merged. If there is more than one candidate above this level, a warning is given. See Authority Record Duplicate Detection Processing on page 4-15 for more information about the Duplicate Replace value.
Duplicate Warn	Enter a numeric value from 1 to 100. This is the level at or above which the system warns the user of matches that are close but that should be reviewed. See Authority Record Duplicate Detection Processing on page 4-15 for more information about the Duplicate Warn value. NOTE: A valid Duplicate Warn value must be less than or equal to the specified Duplicate Replace value. A valid Duplicate Warn value must be specified in order to save the duplicate detection profile.

- Click the **Field Definitions** tab.

Result: The Field Definitions options display. See [Figure 4-4](#).

Cataloging - Authority Duplicate Detection Profiles

Codes	Names
AMERGE	Auth Merge
AUTH1	Auth1
AUTHCOND	AuthAddConditional
AUTHREP	AuthReplace
AUTHUNC	AuthAddUnconditional

New Authority Duplicate Detection Profile:

Profile **Field Definitions**

Code	Available Indexes
A100	Auth Personal Name (100)
A10A	Auth LCCN (010a)
A10Z	Auth LCCN (010z)
A110	Auth Corporate Name (110)
A111	Auth Meeting Name (111)
A130	Auth Uniform Title (130)
A148	Auth Chronological Term
A150	Auth Topical Term (150)
A151	Auth Geographic Name (151)

Code	Selected Indexes	Field	Subfield

Field Override: Sub Field Override: Field Weight:

Save Cancel

Figure 4-4. Field Definitions tab - Authority Duplicate Detection

6. Select the indexes you want to use to match incoming records with existing records for duplicate detection and enter any **Field/Sub Field Override** or **Field Weight** information. See [Table 4-2](#) for more information.

The indexes should be selected in the order you want the system to use them for matching records.

Result: Selected indexes display in the Code/Selected Indexes column and any **Field/Sub Field Override** or **Field Weight** information displays on the **Field Definitions** tab.

**TIP:**

The Voyager Authority Record ID (ATID), or 001 field, is included as an index option. This index enables greater precision when replacing or merging incoming Authority records.

NOTE:

Only left-anchored single field indexes can be used in an Import/Replace profile.

The indexes available on the **Field Definitions** tab are created through the Search component of System Administration. For more information, see Chapter [8](#) about Search configuration.

Table 4-2. Field/Sub Field Override and Field Weight options

Options	Description
Field Override	Use this option in combination with the Sub Field Override option to have the system use something other than the default fields in the index for duplicate detection comparisons. Example: To compare the 019\$a field of an incoming OCLC record with the 035\$a index in the database, specify 019 in Field Override and a in the Sub Field Override with the 035\$a index selected. If there is no 019\$a in the incoming record, no matching is done.
Sub Field Override	Use this option in combination with the Field Override option to have the system use something other than the default fields in the index for duplicate detection comparisons. Example: To compare the 019\$a field of an incoming OCLC record with the 035\$a index in the database, specify 019 in Field Override and a in the Sub Field Override with the 035\$a index selected. If there is no 019\$a in the incoming record, no matching is done.

Table 4-2. Field/Sub Field Override and Field Weight options

Options	Description
Field Weight	Allows you to assign a numerical value (weight) to each field selected to be used in conjunction with the information specified on the Quality Hierarchy tab to determine how good the match is that is being made during duplicate detection processing. A higher number indicates that the field has more value or that it is more important. See Authority Record Duplicate Detection Processing on page 4-15 for more information about the Field Weight value.

Example:

Field/Sub Field Override. To compare the 019 field of an incoming OCLC record with the 035±a index in the database, specify **019** in **Field Override** and **a** in the **Sub Field Override** with the 035±a index selected.

OPTIONAL:

7. Click the **Quality Hierarchy** tab (that only displays when the Replace or Merge Duplicate Handling options are selected on the **Profile** tab) and enter the **Quality Hierarchy** options that match your requirements. See [Figure 4-5](#).

The quality hierarchy determines whether the incoming Authority record or the target record should be kept in the database. The quality hierarchy allows you to specify which record formats are preferable. See Table 4-3 for a description of available options on the **Quality Hierarchy** tab.

New Authority Duplicate Detection Profile:

Profile | Field Definitions | **Quality Hierarchy** | Merge Fields

↑
Priority
↓

Ldr/06	Ldr/17	040\$a	040\$d	040\$e

Add Remove

Record Type Leader/06: Original Agency 040\$a:

Encoding Level Leader/17: Last Modifying Agency 040\$d:

Description Conventions 040\$e:

Save Cancel

Figure 4-5. Quality Hierarchy tab - Authority Duplicate Detection Profile

Table 4-3. Quality Hierarchy Tab Options

Options	Description
Record Type Leader/06	Enter duplicate detection criteria based on the leader 6-7 positions.
Encoding Level Leader/17	Enter duplicate detection criteria based on the institution's encoding level value in the leader 17 position.
Original Agency 040\$a	Enter duplicate detection criteria (up to 15 characters in length) based on the creating (original agency) institution's unique identifying code stored in the 040\$a.

Table 4-3. Quality Hierarchy Tab Options

Options	Description
Last Modifying Agency 040\$d	Enter duplicate detection criteria (up to 15 characters in length) based on the modifying institution's identifying code stored in the 040\$d. NOTE: If \$d is a repeating subfield in the 040, the system will use the last \$d for duplicate detection purposes.
Description Conventions 040\$e	Enter duplicate detection criteria based on the content (such as rda) in the 040\$e. Per the MARC 21 standard, this field may contain up to 12 characters.

Use the **Add** and **Remove** buttons to add and delete rows on the **Quality Hierarchy** tab.

Use the up/down arrow buttons to arrange the **Quality Hierarchy** rows in the order you prefer.

Use the **Record Type Leader/06**, **Encoding Level Leader/17**, **Original Agency 040\$a**, **Last Modifying Agency 040\$d**, and **Description Conventions 040\$e** text boxes to enter new information or edit existing information.

Result: This completes the **Quality Hierarchy** tab portion of the setup for an **Authority Duplicate Detection Profile**.

OPTIONAL:

8. Click the **Merge Fields** tab (that only displays when the Merge Duplicate Handling option is selected on the **Profile** tab) and enter the **Merge Fields** options that match your requirements. See [Figure 4-6](#).

The **Merge Fields** tab lists the fields from which information in the existing record is copied and transferred to the same fields in the new/merged record. The old information is written to the deleted file as described in [Files Affected By Duplicate Detection Processing](#) on [page 4-19](#). See [Table 4-4](#) for a description of available options on the **Merge Fields** tab.

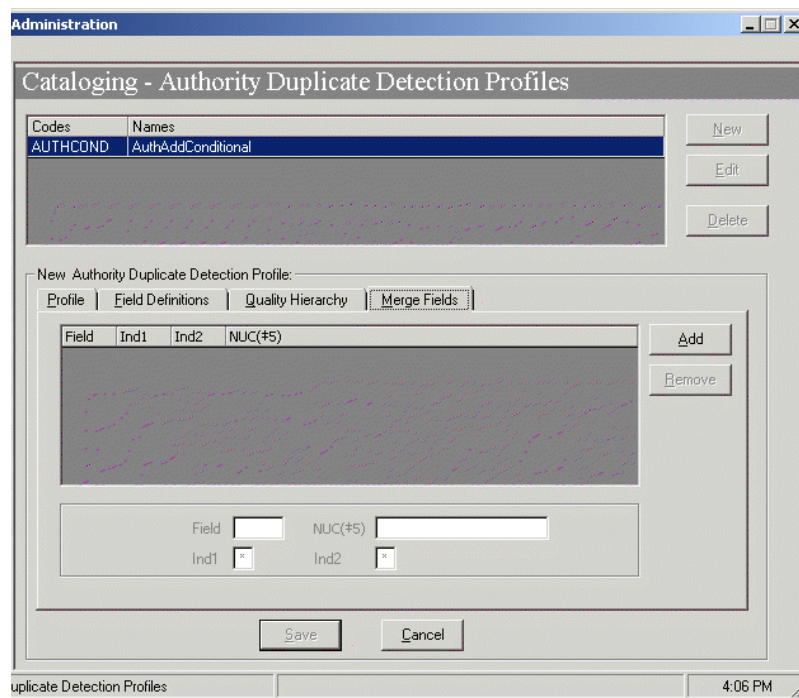


Figure 4-6. Merge Fields tab - Authority Duplicate Detection Profile

Table 4-4. Merge Fields tab options

Options	Description
Field	The field that you want to preserve from the old record.
NUC(±5)	The library code.
Ind1	The first indicator. An asterisk may be used as a wildcard character.
Ind2	The second indicator. An asterisk may be used as a wildcard character.

Use the **Add** and **Remove** buttons to add and delete rows on the **Merge Fields** tab.

Use the **Field**, **NUC(±5)**, **Ind1**, and **Ind2** text boxes to enter new information or edit existing information.

Result: This completes the **Merge Fields** tab portion of the setup for an **Authority Duplicate Detection Profile**.

9. Click **Save** or click **Cancel**.

Result: This saves or cancels the entire profile.

Authority Record Duplicate Detection Processing

There are many components involved in the processing of records for duplicate detection. Highlighted in this section is a description of how selected options in the duplicate detection profile affect the comparison of fields and records that subsequently determine what is added, merged, or replaced in the database. Also described is how processing differs when records are entered in a batch mode through BulkImport or manually entered online through one of the Voyager client modules such as Cataloging.

Profile Options and Duplicate Detection

When creating a duplicate detection profile, you can assign weights to indexes (**Field Definitions** tab) in order to give one index priority over another. This allows you to specify which indexes are more important or pertinent when matching the fields in an incoming record against the fields of records in the database. You can make one index more important than another by giving it a greater weight.

When importing or entering records into the database using any duplicate detection profile, Voyager attempts to make matches based on the fields specified on the **Field Definitions** tab. Each match that is performed receives a score. When a match occurs between an incoming record and an existing record, that match receives the points specified for that field in the **Field Weight** option. If the fields do not match, no points are received. The points for each field are added up to determine the score for that match.

These points are used to determine the relative importance of each match and to determine whether an automatic match may be made. A match is only automatically established if there is one candidate that has a score that is equal to or above the value specified in the **Duplicate Replace** field on the **Select Profile** tab.

If there is only one match above the **Duplicate Replace** value, the action of add, replace, or merge is performed and the original record is written to the replace file in the /rpt sub-directory. See [Files Affected By Duplicate Detection Processing](#) on [page 4-19](#) for more information about the replace file.

If there are two or more above the **Duplicate Replace** limit or none above this limit and one or more above the **Duplicate Warn** value, a warning is given by the system.

This warning is made in one of two ways.

- If the user is performing the action online such as via the Cataloging module, a dialog box is opened with a list of matches from which to choose.
- If the action is made during a bulk import operation, information about that match is written to the discard file which is placed in the /rpt sub-directory. See [Files Affected By Duplicate Detection Processing](#) on [page 4-19](#) for more information about the discard file.

Once a match is made, it is compared against the list specified on the **Quality Hierarchy** tab.

If none match, then the incoming record is written to the reject file which is placed in the /rpt sub-directory. See [Files Affected By Duplicate Detection Processing](#) on [page 4-19](#) for more information about the reject file.

Records written to the log file due to a partial match are not removed from the target database. See [Files Affected By Duplicate Detection Processing](#) on [page 4-19](#) for more information about the log file.

NOTE:

If any single index listed on the **Field Definitions** tab matches with more than 1000 records in the database, all duplicate detection stops. Only the first 100 records above the matching threshold are returned to the client. At this point there is no limit to the number of indexes that can be put in the hierarchy to check.

BulkImport Versus Online Entry

Authority records can be added to a Voyager database via the following methods:

- BulkImport
- Online Import through the Voyager Cataloging module
- Manual creation through the Voyager Cataloging module

When the BulkImport method is used, all the records are processed in a batch mode; any exceptions or issues are identified in a log file and the Authority records are stored in discard or deleted files. See [Files Affected By Duplicate Detection Processing](#) on [page 4-19](#) for more information about discard and delete files.

When Authority records are entered/saved through the Cataloging module, there is an opportunity for the operator to interactively review existing Authority records for issues with duplicates. Changes made to Authority records are displayed in the Global Change Queue of the Cataloging module.

See [Table 4-5](#), [Table 4-6](#), [Table 4-7](#), and [Table 4-8](#) for a description of processing options/results when making entries online for each of the following Duplicate Handling options (see [Table 4-1](#) for more information about Duplicate Handling options):

- Add-Unconditional
- Replace
- Add-Conditional
- Merge

Table 4-5. Add-Unconditional processing options with online entry

Matches	Processing Options/Results
No Match	Record is added.
One Match	Record is added. Duplicate detection warning is displayed through the Authority Dedupe Detection dialog box with several processing options from which to choose to include retrieving/viewing an existing duplicate authority record.
Two or More Matches	Record is added. Duplicate detection warning is displayed through the Authority Dedupe Detection dialog box with the option to retrieve/view one or more existing duplicate authority records.

Table 4-6. Replace processing options with online entry

Matches	Processing Options/Results
No Match	Record is added.
One Match	Recorded is added. Notification message displays indicating that “existing duplicate number ...” was replaced.

Table 4-6. Replace processing options with online entry

Matches	Processing Options/Results
Two or More Matches	Record is not added. Duplicate detection warning is displayed through the Authority Dedupe Detection dialog box with several processing options from which to choose to include retrieving/viewing one or more existing duplicate authority records.

Table 4-7. Add-Conditional processing options with online entry

Matches	Processing Options/Results
No Match	Record is added.
One Match	Record is not added. Duplicate detection warning is displayed through the Authority Dedupe Detection dialog box with several processing options from which to choose to include retrieving/viewing an existing authority record.
Two or More Matches	Record is not added. Duplicate detection warning is displayed through the Authority Dedupe Detection dialog box with several processing options from which to choose to include retrieving/viewing one or more existing duplicate authority records.

Table 4-8. Merge processing options with online entry

Matches	Processing Options/Results
No Match	Record is added.
One Match	Record is added/merged. Merge is performed by taking specified fields (see Figure 4-6 on page 4-14) and adding them to create a new record which is saved to database with the same record ID number. Notification message displays indicating that the record "was merged with overlaid record number ..."

Table 4-8. Merge processing options with online entry

Matches	Processing Options/Results
Duplicate Records	Record is not added. Duplicate detection warning is displayed through the Authority Dedupe Detection dialog box with several processing options from which to choose to include retrieving/viewing one or more existing duplicate authority records.

Files Affected By Duplicate Detection Processing

There are several components that determine which files are affected by the duplicate detection process:

- Method of processing, via BulkImport or through online entry
- Type of record, an Authority record or a Bibliographic record
- Handling of record – delete, discard, replace, reject, error, and so on

See [Table 4-9](#) for a listing of the different files affected and a description of the determining considerations.

Table 4-9. Files Used in Duplicate Detection Processing

File Name	Bulk Import or Online Entry	Authority or Bib Record	Description
delete.auth.yyyymmdd.hhmm.	Bulk Import	Authority	Contains authority records to be deleted.
delete.bib.imp.yyyymmdd.hhmm.<process ID>	Bulk Import	Bib	Contains cancelled bibliographic records that are to be deleted.
deleted.auth.marc	Online	Authority	Used when the duplicate detection profile removes records that are currently in the database and replaces them with the entered record and that record match is equal to or above the value specified in the Duplicate Replace field. Contains deleted authority records.

Table 4-9. Files Used in Duplicate Detection Processing

File Name	Bulk Import or Online Entry	Authority or Bib Record	Description
deleted.bib.marc	Online	Bib	Used when the duplicate detection profile removes records that are currently in the database and replaces them with the entered record and that record match is equal to or above the value specified in the Duplicate Replace field.
discard.auth.yyyymmdd.hhmm	Bulk Import	Authority	Used when the duplicate detection profile does not replace records that are currently in the database because there is more than one duplicate record and/or the match is below the value specified in the Duplicate Replace field.
discard.imp.yyyymmdd.hhmm.<process ID>	Bulk Import	Bib	Used when the duplicate detection profile does not replace records that are currently in the database because the match is below the value specified in the Duplicate Replace field.
discard.auth.marc	Online	Authority	Used when the duplicate detection profile does not replace records that are currently in the database because the match is below the value specified in the Duplicate Replace field.
discard.bib.marc	Online	Bib	Used when the duplicate detection profile does not replace records that are currently in the database because the match is below the value specified in the Duplicate Replace field.

Table 4-9. Files Used in Duplicate Detection Processing

File Name	Bulk Import or Online Entry	Authority or Bib Record	Description
replace.auth.yyyymmdd.hhmm	Bulk Import	Authority	Used for storing existing records when duplicate detection profile replaces or merges existing record with an incoming record.
replace.bib.yyyymmdd.hhmm	Bulk Import	Bib	Used for storing existing records when duplicate detection profile replaces or merges existing record with an incoming record.
reject.auth.yyyymmdd.hhmm	Bulk Import	Authority	Used for storing incoming records when duplicate detection profile is unable to add, replace, or merge the incoming record with the existing record because the match is below the value specified in the Duplicate Replace field.
reject.bib.yyyymmdd.hhmm	Bulk Import	Bib	Used for storing incoming records when duplicate detection profile is unable to add, replace, or merge the incoming record with the existing record because the match is below the value specified in the Duplicate Replace field.
err.imp.yyyymmdd.hhmm.<process ID>	Bulk Import	Both	Used to store records that cannot be processed.
log.imp.yyyymmdd.hhmm.<process ID>	Bulk Import	Both	Stores the number of records processed, added, discarded, rejected, replaced, merged, deleted, and/or had errors.

Additional information about the files affected by duplicate detection processing via BulkImport or via online entry can be found in the *Voyager Technical User's Guide* and the *Voyager Cataloging User's Guide*.

Bibliographic Duplicate Detection

When importing bibliographic records or entering them online from the Cataloging module, Voyager uses Bibliographic Duplicate Detection Profiles to determine how the system should handle the incoming record(s).

You can create profiles to do the following:

- Add a record to the database
- Add a record if it does not match anything in the database
- Replace a matching record in the database with a new record
- Merge the contents of the new record and the record in the database

You need to establish at least one profile so that the system knows how to process incoming records.

When records are being bulk imported or entered online and a Bibliographic Duplicate Detection Profile is used, the system compares each record with the specified profile. Each record is ranked by how well it matches against other records in the database. You can specify exactly what fields in the record the profile compares and which fields are to be given priority over others in order to determine the quality of the match.

Creating Bibliographic Duplicate Detection Profile

The procedure for creating a Bibliographic Duplicate Detection Profile is shown in [Procedure 4-2, Creating Bibliographic Duplicate Detection Profile](#), on page [4-22](#).



Procedure 4-2. Creating Bibliographic Duplicate Detection Profile

Use the following to create a Bibliographic Duplicate Detection Profile.

1. Click **Cataloging** on the vertical listbar.

Result: The Voyager System Administration cataloging options open. See [Figure 4-1](#).

2. Click **Bib Duplicate Detection Profiles**.

Result: The **Cataloging - Bib Duplicate Detection Profiles** dialog box opens. See [Figure 4-7](#).

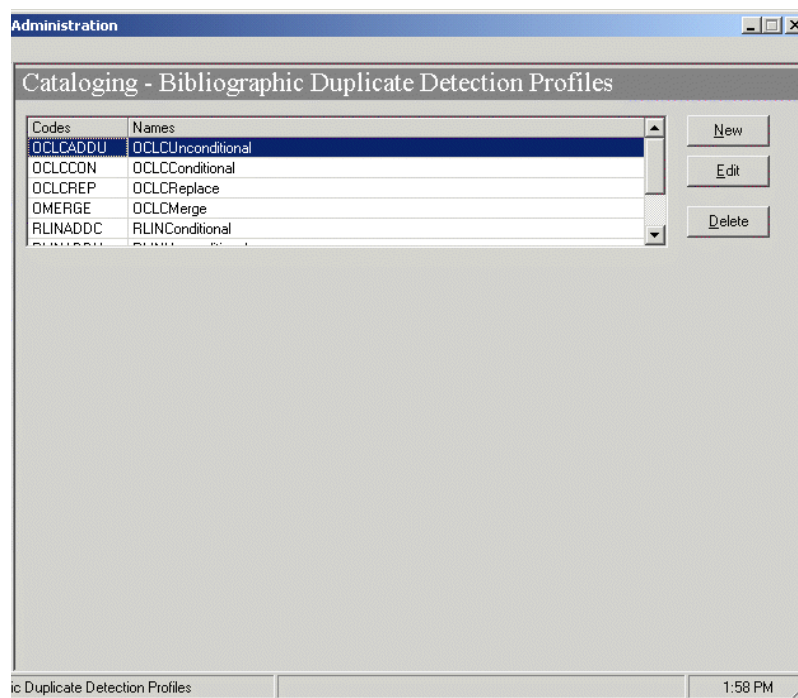


Figure 4-7. Cataloging - Bibliographic Duplicate Detection Profiles

3. Click **New**.

Result: The **New Bib Duplicate Detection Profile** options open. See [Figure 4-8](#).

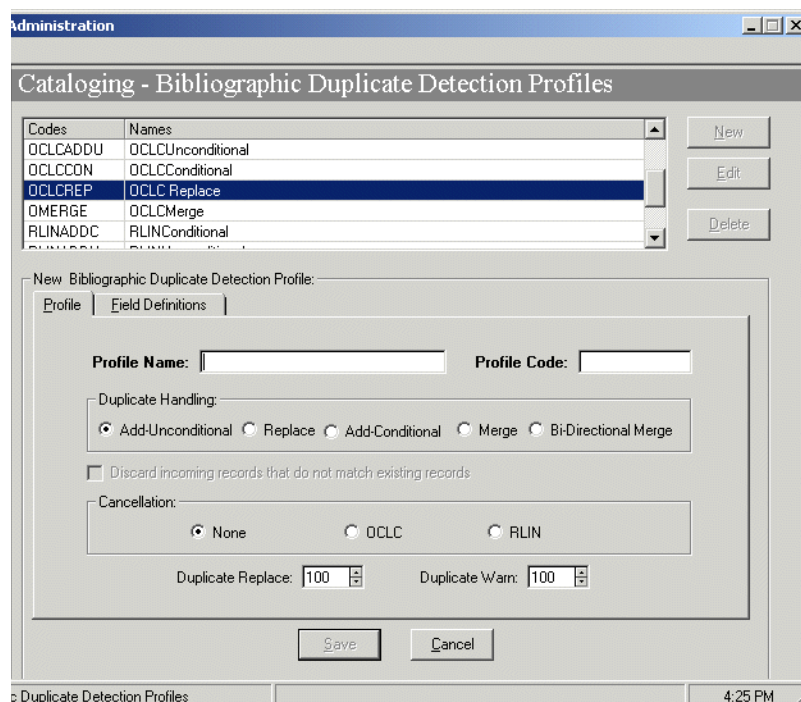


Figure 4-8. New Bibliographic Duplicate Detection Profile options

4. Enter the options on the **Profile** tab to match your requirements. See [Table 4-10](#) for a description of available options on the **Profile** tab.

Result: This completes one part of the setup for a **Bib Duplicate Detection Profile**.

Table 4-10. Profile tab options - Bib Duplicate Detection

Options	Description
Profile Name	25-character maximum length (alphanumeric, punctuation, and spaces). Mixed case may be used for alpha characters.
Profile Code	8-character maximum length. Mixed case may be used for alpha characters. Each Profile Code must be unique for all Cataloging Policy Groups.

Table 4-10. Profile tab options - Bib Duplicate Detection

Options	Description
Duplicate Handling	Add-Unconditional. Specifies that any incoming record is added to the Voyager database even if a duplicate(s) is detected. Replace. Specifies that when an incoming record matches an existing Voyager record, the incoming record replaces the Voyager record (if the quality of the incoming record meets or surpasses the values specified for Duplicate Warn/Replace and Field Weight) and retains the Voyager record number. If the system does not find a match, the incoming record is added to the database. If more than one existing record is matched (duplicate authority records in the database), the system does not replace any record and the imported record is written to the discard file. When entering records from the Cataloging module and duplicates occur, you are given the opportunity to view the records affected. Add-Conditional. During bulk import operations, any incoming record is added to your Voyager database unless a duplicate(s) is detected. If a duplicate(s) is detected, the system does not replace any record and the imported record is written to the discard file. When entering records from the Cataloging module and duplicates occur, you are given the opportunity to view the records affected. Merge. During bulk import operations, any incoming record is added to your Voyager database unless a duplicate is detected. If a duplicate record of higher quality is detected, the system copies information in specified fields (identified on the Merge Fields tab) from the existing record to the new record which is then written to the database. The old record is moved to the deleted file. Bi-Directional Merge. Select this option to extend the merge functionality in Duplicate Handling. Bi-Directional Merge allows the system administrator to define fields in the incoming (versus existing) record to be retained when the incoming record fails the quality hierarchy and is not loaded. This allows for the creation of a “super” bibliographic record containing all fields by all contributing cataloging agencies. NOTE: There are many components involved in the processing of records and Duplicate Handling. For more information about the logic in duplicate detection processing, files created and appended, deleted, discarded, replaced records, and so on, see Bibliographic Record Duplicate Detection Processing on page 4-33, Profile Options and Duplicate Detection on page 4-33, BulkImport Versus Online Entry on page 4-34, and Files Affected By Duplicate Detection Processing on page 4-38.

Table 4-10. Profile tab options - Bib Duplicate Detection

Options	Description
Discard incoming records that do not match existing records	Select this option to indicate when Replace, Merge, or Bi-Directional Merge are chosen as Duplicate Handling methods, incoming records are to be discarded when they do not match existing records during bulk import. The default is to add incoming records to the database when there is no match.
Cancellation	None. Select None if the Profile is to be used for records from any other source; if you do not care about the existence of a cancellation/delete code in either an OCLC or an RLIN record; or if the source does not use a cancellation/delete code in its records. OCLC. Select OCLC if the Profile is to be used for records imported from OCLC and you want to check for the presence of 03 in byte position 22 of the record leader and do not under any circumstances want to load such a record into your database. RLIN. Select RLIN if the Profile is to be used for records imported from RLIN and you want to check for the presence of d in field 090 subfield i of the record and do not under any circumstances want to load such a record into your database.
Duplicate Replace	Enter a numeric value from 1 to 100. This is the level at or above which a single match may be automatically replaced or merged. If there is more than one candidate above this level, a warning is given.
Duplicate Warn	Enter a numeric value from 1 to 100. This is the level at or above which the system warns the user of matches that are close but that should be reviewed. NOTE: A valid Duplicate Warn value must be less than or equal to the specified Duplicate Replace value. A valid Duplicate Warn value must be specified in order to save the duplicate detection profile.

- Click the **Field Definitions** tab.

Result: The Field Definitions options display. See [Figure 4-9](#).

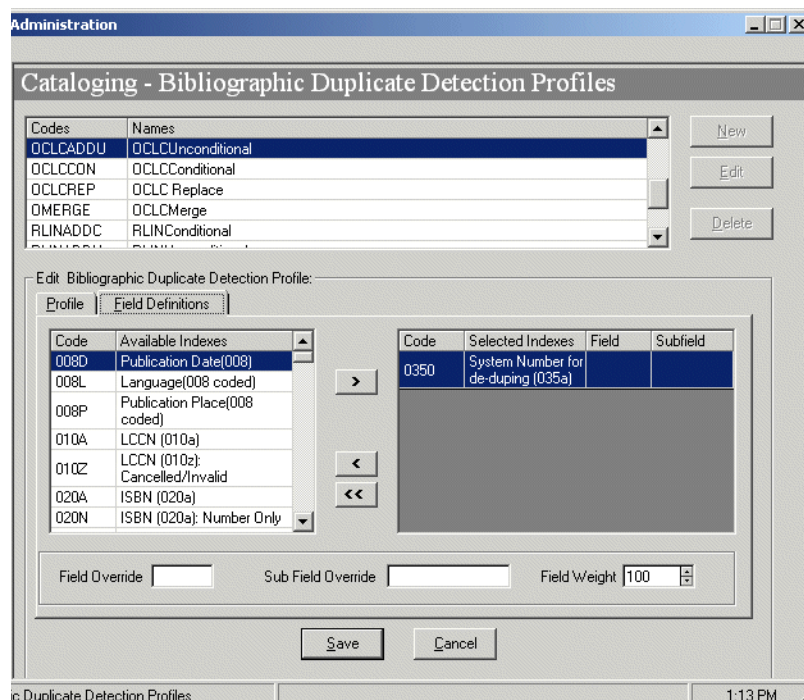


Figure 4-9. Field Definitions tab - Bibliographic Duplicate Detection

6. Select the indexes you want to use to match incoming records with existing records for duplicate detection, and enter any **Field/Sub Field Override** or **Field Weight** preferences. See Table 4-11 for more information. See also [Profile Options and Duplicate Detection](#) on [page 4-33](#) for more information.

The indexes should be selected in the order you want the system to use them for matching records.

Result: Selected indexes display in the **Code/Selected Indexes** columns and any **Field/Sub Field Override** or **Field Weight** information displays on the **Field Definitions** tab.

NOTE:

At least one index needs to be specified in the **Selected Indexes** list in order to save a duplicate detection profile.

NOTE:

Only left-anchored single field indexes can be used in an Import/Replace profile.



TIP:

The Voyager Bibliographic Record ID (BBID), or 001 field, is included as an index option. This index enables greater precision when replacing or merging incoming Bibliographic records.



TIP:

Use code 0350 instead of 035A for replacing/merging records with duplicate detection.



TIP:

Carefully select the 020A, 020N, 020R, or 020Z indexes. The 020A index stores ISBN data with or without parenthetical information; the 020Z index stores cancelled/invalid ISBN data with or without parenthetical information.

The 020N index stores the data from the 020A index minus any parenthetical information. The 020R stores the data from the 020Z index minus any parenthetical information.

The 020 indexes are evaluated for exact matches. If your intent is to validate an exact match on only an ISBN number (not parenthetical information), use the 020N or 020R indexes. This can be extremely useful when working with Universal Catalog databases.

RECOMMENDED:

The 020N and 020R indexes should not be selected concurrently with the 020A and 020Z indexes.

The indexes available on the **Field Definitions** tab are created through the Search component of System Administration. For more information, see Chapter [8](#) about Search configuration.

Table 4-11. Field/Sub Field Override and Field Weight options

Options	Description
Field Override	Use this option in combination with the Sub Field Override option to have the system use something other than the default fields in the index for duplicate detection comparisons. See the Field/Sub Field Override example.
Sub Field Override	Use this option in combination with the Field Override option to have the system use something other than the default fields in the index for duplicate detection comparisons. See the Field/Sub Field Override example.
Field Weight	Allows you to assign a numerical value (weight) to each field selected to be used in conjunction with the information specified on the Quality Hierarchy tab to determine how good the match is that is being made during duplicate detection processing. A higher number indicates that the field has more value, is more important.

Example:

Field/Sub Field Override. To compare the 019 field in an incoming OCLC record with the 035±a index in the database, specify 019 in **Field Override** and a in **Sub Field Override** with the 035±a index selected.

OPTIONAL:

7. Click the **Quality Hierarchy** tab (that only displays when the Replace, Merge, or Bi-Directional Merge Duplicate Handling options are selected on the **Profile** tab) and enter the **Quality Hierarchy** options that match your requirements. See [Figure 4-10](#).

The quality hierarchy determines whether the incoming Bibliographic record or the target record should be kept in the database or merged. The quality hierarchy allows you to specify which record formats are preferable. See [Table 4-12](#) for a description of available options on the **Quality Hierarchy** tab.

New Bibliographic Duplicate Detection Profile:

Profile | Field Definitions | **Quality Hierarchy** | Merge Fields

Ldr/06	Ldr/17	040\$a	040\$d	040\$e

Priority ↑ ↓

Record Type Leader/06: Original Agency 040\$a:

Encoding Level Leader/17: Last Modifying Agency 040\$d:

Description Conventions 040\$e:

Save Cancel

Figure 4-10. Quality Hierarchy tab - Bibliographic Duplicate Detection Profile

Table 4-12. Quality Hierarchy Tab Options

Options	Description
Record Type Leader/06	Enter duplicate detection criteria based on the leader 6-7 positions.
Encoding Level Leader/17	Enter duplicate detection criteria based on the institution's encoding level value in the leader 17 position.
Original Agency 040\$a	Enter duplicate detection criteria (up to 15 characters in length) based on the creating (original agency) institution's unique identifying code stored in the 040\$a.

Table 4-12. Quality Hierarchy Tab Options

Options	Description
Last Modifying Agency 040\$d	Enter duplicate detection criteria (up to 15 characters in length) based on the modifying institution's identifying code stored in the 040\$d. NOTE: If \$d is a repeating subfield in the 040, the system will use the last \$d for duplicate detection purposes.
Description Conventions 040\$e	Enter duplicate detection criteria based on the content (such as rda) in the 040\$e. Per the MARC 21 standard, this field may contain up to 12 characters. NOTE: If \$e is a repeating subfield in the 040, the system will use the last \$e for duplicate detection purposes.

Use the **Add** and **Remove** buttons to add and delete rows on the **Quality Hierarchy** tab.

Use the up/down arrow buttons to arrange the **Quality Hierarchy** rows in the order you prefer.

Use the **Record Type Leader/06**, **Encoding Level Leader/17**, **Original Agency 040\$a**, **Last Modifying Agency 040\$d**, and **Description Conventions 040\$e** text boxes to enter new information or edit existing information.

Result: This completes the **Quality Hierarchy** tab portion of the setup for a **Bibliographic Duplicate Detection Profile**.

OPTIONAL:

8. Click the **Merge Fields** tab (that only displays when the Merge or Bi-Directional Merge Duplicate Handling option is selected on the **Profile** tab) and enter the **Merge Fields** options that match your requirements. See [Figure 4-11](#).

The **Merge Fields** tab lists the fields from which information in the existing record (and incoming record for Bi-Directional Merge) is copied and transferred to the same fields in the new/merged record. The old information is written to the deleted file as described in [Files Affected By Duplicate Detection Processing](#) on [page 4-38](#). See Table 4-13 for a description of available options on the **Merge Fields** tab.

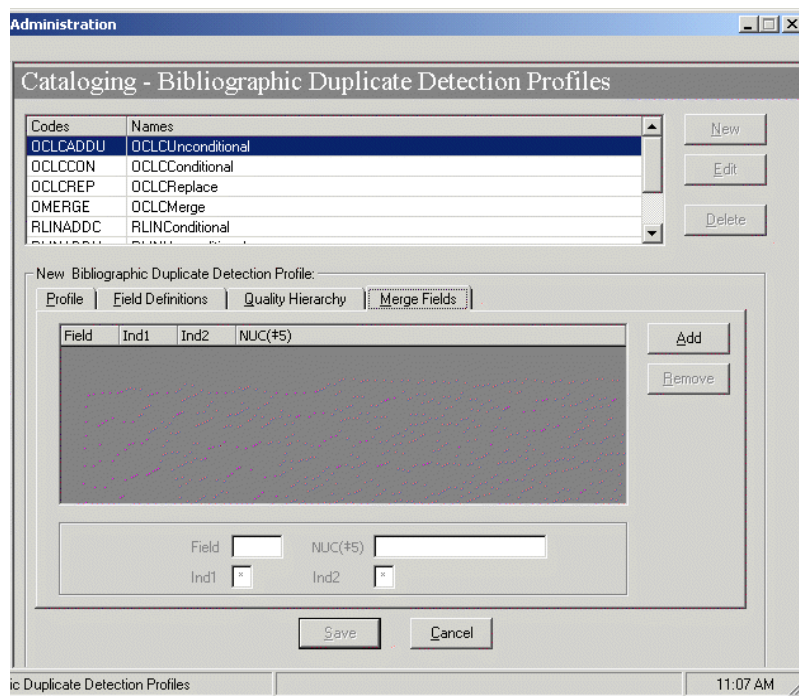


Figure 4-11. Merge Fields tab - Bibliographic Duplicate Detection Profile

Table 4-13. Merge Fields tab options

Options	Description
Field	The field that you want to preserve from the old record.
NUC(±5)	The library code.
Ind1	The first indicator. An asterisk may be used as a wildcard character.
Ind2	The second indicator. An asterisk may be used as a wildcard character.

Use the **Add** and **Remove** buttons to add and delete rows on the **Merge Fields** tab.

Use the **Field**, **NUC(±5)**, **Ind1**, and **Ind2** text boxes to enter new information or edit existing information.

Result: This completes the **Merge Fields** tab portion of the setup for a **Bibliographic Duplicate Detection Profile**.

9. Click **Save** or click **Cancel**.

Result: This saves or cancels the entire profile.

Bibliographic Record Duplicate Detection Processing

There are many components involved in the processing of records for duplicate detection. Highlighted in this section is a description of how selected options in the duplicate detection profile affect the comparison of fields and records that subsequently determine what is added, merged, or replaced in the database. Also described is how processing differs when records are entered in a batch mode through BulkImport or manually entered online through one of the Voyager client modules such as Cataloging.

Profile Options and Duplicate Detection

When creating a duplicate detection profile, you can assign weights to indexes (**Field Definitions** tab) in order to give one index priority over another. This allows you to specify which indexes are more important or pertinent when matching the fields in an incoming record against the fields of records in the database. You can make one index more important than another by giving it a greater weight.

When importing or entering records into the database using any duplicate detection profile, Voyager attempts to make matches based on the fields specified on the **Field Definitions** tab. Each match that is performed receives a score. When a match occurs between an incoming record and an existing record, that match receives the points specified for that field in the **Field Weight** option. If the fields do not match, no points are received. The points for each field are added up to determine the score for that match.

These points are used to determine the relative importance of each match and to determine whether an automatic match may be made. A match is only automatically established if there is one candidate that has a score that is equal to or above the value specified in the **Duplicate Replace** field on the **Select Profile** tab.

If there is only one match above the **Duplicate Replace** value, the action of add, replace, or merge is performed and the original record is written to the replace file in the /rpt sub-directory. See [Files Affected By Duplicate Detection Processing](#) on [page 4-38](#) for more information about the replace file.

If there are two or more above the **Duplicate Replace** limit or none above this limit and one or more above the **Duplicate Warn** value, a warning is given by the system.

This warning is made in one of two ways.

- If the user is performing the action online such as via the Cataloging module, a dialog box is opened with a list of matches from which to choose.
- If the action is made during a bulk import operation, information about that match is written to the discard file which is placed in the /rpt sub-directory. See [Files Affected By Duplicate Detection Processing](#) on [page 4-38](#) for more information about the discard file.

Once a match is made, it is compared against the list specified on the **Quality Hierarchy** tab.

If none match, then the incoming record is written to the reject file which is placed in the /rpt sub-directory. See [Files Affected By Duplicate Detection Processing](#) on [page 4-38](#) for more information about the reject file.

Records written to the log file due to a partial match are not removed from the target database. See [Files Affected By Duplicate Detection Processing](#) on [page 4-38](#) for more information about the log file.

NOTE:

If any single index listed on the **Field Definitions** tab matches with more than 1,000 duplicate records in the database, the system stops checking for duplicates starting with the first record after the 1,000th duplicate, and it continues to load the rest of the records from the incoming file. The first 100 duplicates are logged in Log.imp.yyyymmdd.hhmm (see [Table 4-19](#) on [page 4-38](#)) listing the bibliographic IDs that matched the incoming records based on the matching field weight/threshold assigned in the Bibliographic Duplicate Detection Profile. There is no limit to the number of indexes that can be selected on the **Field Definitions** tab.

BulkImport Versus Online Entry

Bibliographic records can be added to a Voyager database via the following methods:

- BulkImport
- Online Import through the Voyager client modules Cataloging and Acquisitions
- Manual creation via the Cataloging, Acquisitions, or Circulation modules of Voyager

When the BulkImport method is used, all the records are processed in a batch mode; any exceptions or issues are identified in a log file and the Bibliographic records are stored in discard or deleted files. See [Files Affected By Duplicate Detection Processing](#) on [page 4-38](#) for more information about discard and delete files.

When Bibliographic records are imported through Cataloging or Acquisitions, there is an opportunity for the operator to interactively review existing Bibliographic records for issues with duplicates.

See [Table 4-14](#), [Table 4-15](#), [Table 4-16](#), [Table 4-17](#), and [Table 4-18](#) for a description of processing options/results when making entries online for each of the following Duplicate Handling options (see [Table 4-10](#) for more information about Duplicate Handling options):

- Add-Unconditional
- Replace
- Add-Conditional
- Merge
- Bi-Directional Merge

Table 4-14. Add-Unconditional processing options with online entry

Matches	Processing Options/Results
No Match	Record is added.
One Match	Record is added. Duplicate detection warning is displayed through the Bibliographic Dedupe Detection dialog box with the option to retrieve/view an existing duplicate bibliographic record.
Two or More Matches	Record is added. Duplicate detection warning is displayed through the Bibliographic Dedupe Detection dialog box with the option to retrieve/view one or more existing duplicate bibliographic records.

Table 4-15. Replace processing options with online entry

Matches	Processing Options/Results
No Match	Record is added.
One Match	Recorded is added. Notification message displays indicating that “existing duplicate number ...” was replaced.
Two or More Matches	Record is not added. Duplicate detection warning is displayed through the Bibliographic Dedupe Detection dialog box with several processing options from which to choose to include retrieving/viewing one or more existing duplicate bibliographic records.

Table 4-16. Add-Conditional processing options with online entry

Matches	Processing Options/Results
No Match	Record is added.
One Match	Record is not added. Duplicate detection warning is displayed through the Bibliographic Dedupe Detection dialog box with several processing options from which to choose to include retrieving/viewing an existing bibliographic record.
Two or More Matches	Record is not added. Duplicate detection warning is displayed through the Bibliographic Dedupe Detection dialog box with several processing options from which to choose to include retrieving/viewing one or more existing duplicate bibliographic records.

Table 4-17. Merge processing options with online entry

Matches	Processing Options/Results
No Match	Record is added.
One Match	Record is added/merged. Merge is performed by taking specified fields (see Figure 4-11 on page 4-32) and adding them to create a new record which is saved to database with the same record ID number. Notification message displays indicating that the record “was merged with overlaid record number ...”
Duplicate Records	Record is not added. Duplicate detection warning is displayed through the Bibliographic Dedupe Detection dialog box with several processing options from which to choose to include retrieving/viewing one or more existing duplicate bibliographic records.

Table 4-18. Bi-Directional Merge processing options with online entry

Matches	Processing Options/Results
No Match	Record is added.
One Match	Record is added/merged. If the incoming record fails the quality hierarchy, the protected fields from the incoming record are added to the existing bibliographic record. If the incoming record wins the quality hierarchy, the protected fields from the existing record are added to the incoming bibliographic record which is saved in the database. Notification message displays indicating that the record “was merged with overlaid record number ...”

Table 4-18. Bi-Directional Merge processing options with online entry

Matches	Processing Options/Results
Duplicate Records	Record is not added. The existence of duplicate records already in the original database prevents that particular record from being merged. Duplicate detection warning is displayed through the Bibliographic Dedupe Detection dialog box with several processing options from which to choose to include retrieving/viewing one or more existing duplicate bibliographic records.

Files Affected By Duplicate Detection Processing

There are several components that determine which files are affected by the duplicate detection process:

- Method of processing, through BulkImport or through online entry
- Type of record, an Authority record or a Bibliographic record
- Handling of record – delete, discard, replace, reject, error and so forth

See [Table 4-19](#) for a listing of the different files affected and a description of the determining considerations.

Table 4-19. Files Used in Duplicate Detection Processing

File Name	Bulk Import or Online Entry	Authority or Bib Record	Description
delete.auth.imp.yyyymmdd.hhmm.<process ID>	Bulk Import	Authority	Contains authority records to be deleted.
delete.bib.imp.yyyymmdd.hhmm.<process ID>	Bulk Import	Bib	Contains bibliographic records marked as cancelled.
deleted.auth.marc	Online	Authority	Contains deleted authority records.
deleted.bib.marc	Online	Bib	Contains deleted bibliographic records.

Table 4-19. Files Used in Duplicate Detection Processing

File Name	Bulk Import or Online Entry	Authority or Bib Record	Description
discard.auth.yyyymmdd.hhmm	Bulk Import	Authority	Used when duplicate detection profile does not replace records that are currently in the database because there is more than one duplicate record and/or the match is below the value specified in the Duplicate Replace field.
discard.imp.yyyymmdd.hhmm.<process ID>	Bulk Import	Bib	Used when duplicate detection profile does not replace records that are currently in the database because the match is below the value specified in the Duplicate Replace field.
discard.auth.marc	Online	Authority	Used when duplicate detection profile does not replace records that are currently in the database because the match is below the value specified in the Duplicate Replace field.
discard.bib.marc	Online	Bib	Used when duplicate detection profile does not replace records that are currently in the database because the match is below the value specified in the Duplicate Replace field.
replace.auth.yyyymmdd.hhmm	Bulk Import	Authority	Used for storing existing records when duplicate detection profile replaces or merges existing record with an incoming record.

Table 4-19. Files Used in Duplicate Detection Processing

File Name	Bulk Import or Online Entry	Authority or Bib Record	Description
replace.bib.yyyymmdd.hhmm	Bulk Import	Bib	Used for storing existing records when duplicate detection profile replaces or merges existing record with an incoming record.
reject.auth.yyyymmdd.hhmm	Bulk Import	Authority	Used for storing incoming records when duplicate detection profile is unable to add, replace, or merge the incoming record with the existing record because the match is below the value specified in the Duplicate Replace field.
reject.bib.yyyymmdd.hhmm	Bulk Import	Bib	Used for storing incoming records when duplicate detection profile is unable to add, replace, or merge the incoming record with the existing record because the match is below the value specified in the Duplicate Replace field.
err.imp.yyyymmdd.hhmm.<process ID>	Bulk Import	Both	Used to store records that cannot be processed.
log.imp.yyyymmdd.hhmm.<process ID>	Bulk Import	Both	Stores the number of records processed, added, discarded, rejected, replaced, merged, deleted, and/or had errors.

Additional information about the files affected by duplicate detection processing via BulkImport or through online entry can be found in the *Voyager Technical User's Guide* and the *Voyager Cataloging User's Guide*.

Bulk Import Rules

Voyager bulk import provides functionality for loading bibliographic records into your Voyager MARC database and creating holdings, items, and purchase orders. Bulk import rules enable you to define the characteristics of importing basic records and vendor shelf-ready materials. See [Procedure 4-3, Creating Bulk Import Rules](#), on page [4-44](#) for the steps to create bulk import rules.

Refer also to the *Voyager Cataloging User's Guide* for information regarding building the 035 and OCLC control number expansion.

The UTF-8 Character Set Encoding: Character Set Mapping, Record Leader, and Conversion Attempts

Bibliographic, Authority, and Holdings records in your Voyager database are in the Unicode character set. Therefore, records being imported into the database must be in the Unicode character set, if they are not, the Bulk Import program attempts to convert them. Item records, which are not MARC records, are in the Latin-1 character set.

When Bulk Importing records into the Voyager database, the system uses the character set mapping defined in the Bulk Import Rule, the value of the leader byte 9, and the results of the conversion attempt to determine if a record is eligible for import.

Records error out, and consequently are not imported, because

- there is disagreement between the mapping character set rule and the value of the leader's byte 9
- the conversion to UTF-8 fails, or
- due to other reasons not related to the character set.

NOTE:

All MARC records in the Voyager database must be UTF-8 encoded. If the conversion from another encoding to the UTF-8 encoding fails, try using third party software to convert the records, or obtain UTF-8 encoded records for import.

Character Set Mapping

Since the Bibliographic, Authority, and Holdings records in the Voyager database use UTF-8 encoding, the system attempts to convert records not at that level before importing them.

The Bulk Import rule specifies the expected character set of the incoming records. In the **System Administration> Cataloging> Bulk Import Rules> Rules tab> Expected Character Set Mapping of the Imported Records** field the character set is defined. See *Creating Bulk Import Rule* in the *Voyager System Administration User's Guide* for more information.

Leader Byte 9 Value

The Leader Byte 9 value specifies the character coding scheme used in the record. In the incoming record, if the value of the leader's byte 9 is an 'a', then the record is in the Unicode character set (UTF-8 encoded). If it is blank, or anything other than 'a', then the record is in a character set other than Unicode and requires converting.

Converting Records to Unicode

The incoming records not already in the Unicode character set must be converted. The Bulk Import program attempts to convert these records one by one. The results of this conversion is either success, that is, a record is converted and then available for import, or failure, that is, the record is not converted and not able to be imported. A record fails if the program is unable to convert any part of it.



IMPORTANT:

The entire conversion process (and therefore the import process) aborts if the character set specified in the rule is not the same as the character set indicated in the leaders byte 9 in the first record. If a record is encountered later in the file where the leader byte 9 doesn't match the character set specified in the bulk import rule, that record is sent to the error file and the job moves to process the next record.

[Table 4-20](#) describes the what occurs in the conversion process given a specific character set of incoming records, as specified in the Bulk Import Rule, and the Leader Byte 9 value.

Table 4-20. Bulk Import Conversion Situations

Character Set of Incoming Records from Bulk Import rule	Leader's Byte 9 Value	Conversion to UTF-8?	Processing Result
UTF-8	a	No conversion needed.	Proceed with import of the record.
UTF-8	Blank	No conversion attempted due to Character set and leader mismatch.	Error, see log.
OCLC	a	No conversion attempted due to Character set and leader mismatch.	Error, see log.
OCLC	Blank	Successful conversion.	Proceed with import of the record.
OCLC	Blank	Failed conversion.	Error, see log
RLIN Legacy	a	No conversion attempted due to Character set and leader mismatch.	Error, see log.
RLIN Legacy	Blank	Successful conversion.	Proceed with import of the record.
RLIN Legacy	Blank	Failed conversion.	Error, see log
Latin-1	a	No conversion attempted due to Character set and leader mismatch.	Error, see log.
Latin-1	Blank	Successful conversion.	Proceed with import of the record.
Latin-1	Blank	Failed conversion.	Error, see log
MARC-8	a	No conversion attempted due to Character set and leader mismatch.	Error, see log.
MARC-8	Blank	Successful conversion.	Proceed with import of the record.
MARC-8	Blank	Failed conversion.	Error, see log

Table 4-20. Bulk Import Conversion Situations

Character Set of Incoming Records from Bulk Import rule	Leader's Byte 9 Value	Conversion to UTF-8?	Processing Result
Voyager Legacy	a	No conversion attempted due to Character set and leader mismatch.	Error, see log.
Voyager Legacy	Blank	Successful conversion.	Proceed with import of the record.
Voyager Legacy	Blank	Failed conversion.	Error, see log

NOTE:

A warning may be provided when MARC21 characters which were formerly mapped to the Private Use Area (PUA) are encoded to Unicode. These warnings are informational and require no data clean up.

Creating Bulk Import Rules

[Procedure 4-3, Creating Bulk Import Rules](#), describes the steps to create a bulk import rule.

**Procedure 4-3. Creating Bulk Import Rules**

1. Click **Cataloging** on the vertical listbar.

Result: The Voyager System Administration cataloging options open. See [Figure 4-1](#).

2. Click **Bulk Import Rules**.

Result: The **Cataloging - Bulk Import Rules** dialog box opens. See [Figure 4-12](#).

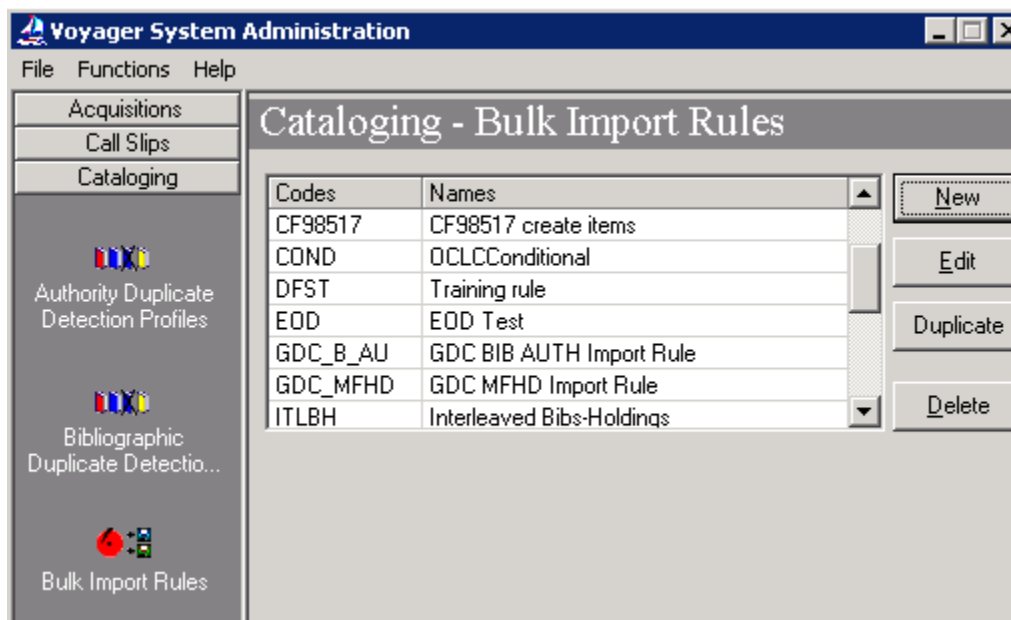


Figure 4-12. Cataloging - Bulk Import Rules

3. Click **New**.

Result: The **New Bulk Import Rule** options open. See [Figure 4-13](#).

New Bulk Import Rule:

Rule Name | Rules | Profiles | Item Type | Mapping | Barcode | Item Information

Code:

Name:

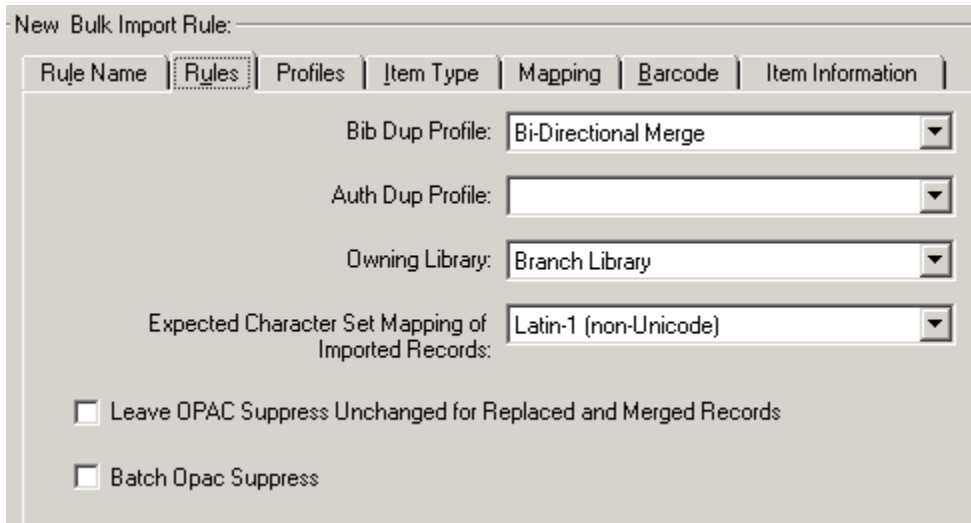
Figure 4-13. Tab options for a new bulk import rule

4. Enter the Code and Name for the Bulk Import Rule.

Result: This identifies the new Bulk Import Rule that you are creating.

5. Click the **Rules** tab (see [Figure 4-14](#)) and enter the **Rules** tab options that match your requirements.

See [Table 4-21](#) for a description of available options on the Rules tab.



The screenshot shows a dialog box titled "New Bulk Import Rule:". It has six tabs: "Rule Name", "Rules", "Profiles", "Item Type", "Mapping", "Barcode", and "Item Information". The "Rules" tab is selected and highlighted. Inside the "Rules" tab, there are four dropdown menus: "Bib Dup Profile:" (set to "Bi-Directional Merge"), "Auth Dup Profile:" (empty), "Owning Library:" (set to "Branch Library"), and "Expected Character Set Mapping of Imported Records:" (set to "Latin-1 (non-Unicode)"). Below these are two checkboxes: "Leave OPAC Suppress Unchanged for Replaced and Merged Records" and "Batch Opac Suppress", both of which are currently unchecked.

Figure 4-14. Rules tab options

Table 4-21. Rules tab options

Option	Description
Bib Dup Profile	Select a bibliographic duplicate detection profile. Duplicate records are matched on indexes. Duplicates are handled by the rules set in the profile selected.  IMPORTANT: <i>The bibliographic duplicate detection profile selected for the rule for importing embedded order data (EOD) may need to specify the Add - Unconditional option for Duplicate Handling to insure that all line item data is added to a purchase order in Acquisitions. See Embedded Order Data on page C-1 for more information about setups for importing order data.</i> <i>Also, when using Update previously loaded MFHDs and/or Items, the second part of an EOD load workflow, (see Table 4-22 on page 4-49), you can only use Replace or Merge bibliographic duplicate detection profiles.</i>
Auth Dup Profile	Select an authority duplicate detection profile. Duplicate records are matched on indexes. Duplicates are handled by the rules set in the profile selected.
Owning Library	Select the owning library to indicate which owning library can edit or add to the record. NOTE: The Owning Library must match in order for a replace to occur.
Expected Character Set Mapping of Imported Records	Select the option that matches the character set of the incoming records. Your choices are Latin-1 (non-Unicode), MARC21 MARC-8 (non-Unicode), MARC21 UTF-8, OCLC (non-Unicode), RLIN legacy (non-Unicode), and Voyager legacy (non-Unicode). Incoming records are stored in Unicode UTF-8 encoding.
Leave OPAC Suppress Unchanged for Replaced and Merged Records	Select this option to maintain the suppress status of the existing record when importing records with Replace or Merge specified as the duplicate handling method.
Batch OPAC Suppress	Mark the Batch OPAC Suppress check box to suppress all incoming bibliographic records from WebVoyage.

- Click the **Profiles** tab (see [Figure 4-15](#)) and enter the **Profiles** tab options that match your requirements.

See [Table 4-22](#) for a description of available options on the Profiles tab.

Voyager provides the flexibility for defining single MFHD (pre-Voyager 8.1 method) and multiple MFHD profiles.

Single MFHD

Use the single MFHD profile options to create 0 or 1 MFHD, item, or purchase order per single bibliographic record. The location/barcode information may come from any tag in the record.

Multiple MFHDs

Use the multiple MFHDs profile options to create one or more MFHDs, items, or POs per single bibliographic record. The remaining options on the Profiles tab dynamically display as available as a result of your single or multiple MFHD profile selection. All information about a single MFHD and item comes from a single tag that is repeatable within a bibliographic record. With the Multiple method, you can also update MFHDs and items in a subsequent bulk import using the Update previously loaded MFHDs and/or Items option (see Table 4-22 on page 4-48).

The screenshot shows the 'New Bulk Import Rule' dialog box with the 'Profiles' tab selected. The dialog has several tabs: Rule Name, Rules, Profiles, Item Type, Mapping, Barcode, and Item Information. The 'Profiles' tab is active and contains two main sections: 'Single MFHD' and 'Multiple MFHDs'. The 'Single MFHD' section has five radio button options: 'Load Bib / Auth Only' (selected), 'Bibs, MFHDs', 'Bibs, MFHDs, POs', 'Bibs, MFHDs, Items', and 'Bibs, MFHDs, POs, Items'. Below these is a 'Single...' button. The 'Multiple MFHDs' section has four radio button options: 'Bibs, MFHDs, POs', 'Bibs, MFHDs, multiple Items', 'Bibs, MFHDs, multiple Items, POs', and 'Update previously loaded MFHDs and/or Items'. Below these is a 'Multiple...' button. To the right of these sections are five unchecked checkboxes: 'Copy 852-855, 863-878 Fields From Bib to MFHD', 'Copy 856 Field From Bib to MFHD', 'Create one PO per bibliographic record', 'Automatically Approve all POs', and 'Create PO/MFHD/Item for existing Bibs'.

Figure 4-15. Profiles tab options

Table 4-22. Profiles tab options

Option	Description
Single MHFD	
Load Bib/Auth Only	Select this option to have Bulk Import automatically load bibliographic and authority records from the incoming MARC data. NOTE: No MFHD or item records or purchase orders are created.
Bibs, MFHDs	Select this option to have Bulk Import automatically load bibliographic and MFHD records from the incoming MARC data.
Bibs, MFHDs, POs	Select this option to have Bulk Import automatically load bibliographic and MFHD records and purchase orders from the incoming MARC data. Selecting this option causes the Order button to become active for mapping information in the bibliographic records to new purchase orders. See Step 7 for more information.
Bibs, MFHDs, Items	Select this option to have Bulk Import automatically load bibliographic, MFHD, and item records from the incoming MARC data.
Bibs, MFHDs, POs, Items	Select this option to have Bulk Import automatically load bibliographic, MFHD, and item records and purchase orders from the incoming MARC data. Selecting this option causes the Order button to become active for mapping information in the bibliographic records to new purchase orders. See Step 7 for more information.
Single button	Enter the values for: • Loc. Field • Loc. Subfield • Loc. Indicator 1 • Loc. Indicator 2 The Loc. Field, Loc. Subfield, Loc. Indicator 1, and Loc. Indicator 2 fields specify which field in the incoming MARC record contains the intended location information for the MFHD. This information is stored in the 852 \$b of the newly-created MFHD record.

Table 4-22. Profiles tab options

Option	Description
Multiple MFHDs	
Bibs, MFHDs, POs	Select this option to have Bulk Import automatically load multiple MFHD records and purchase orders for each bibliographic record from the incoming MARC data. Selecting this option causes the Order button to become active for mapping information in the bibliographic records to new purchase orders. See Step 7 for more information.
Bibs, MFHDs, multiple Items	Select this option to have Bulk Import automatically load multiple MFHD and item records for each bibliographic record from the incoming MARC data.
Bibs, MFHDs, multiple Items, POs	Select this option to have Bulk Import automatically load multiple MFHD and item records and purchase orders for each bibliographic record from the incoming MARC data. Selecting this option causes the Order button to become active for mapping information in the bibliographic records to new purchase orders. See Step 7 for more information.
Update previously loaded MFHDs and/or Items	Select this option for EOD/existing MFHD and/or item updates of the following: • Call number • Barcode • Item type • Price • Enum • Chron • Year • Note • Item status NOTE: This option can only be used with Replace or Merge bibliographic duplicate detection profiles (see the Rules tab, Table 4-21 on page 4-47). For more information regarding the process and logic with using this option, see Processing Records with Update Previously Loaded MFHDs and/or Items on page 4-76.

Table 4-22. Profiles tab options

Option	Description
Multiple button / Multiple MFHD dialog box	Enter the values, where needed, for Main Tag, Main Tag ind1, Main Tag ind2, Subfields for Item Fields (location code, item type, enum, chron, year, pieces, copy number, barcode, item note, charge note, caption, freetext, price) and select the option to use if the copy number is not present or specified previously.
Main Tag and Subfields for Item Fields areas	These options specify which field/subfield in the incoming MARC data contains the information for the item (see Figure 4-16 below).

The screenshot shows the 'Multiple MFHD' dialog box. It has a title bar 'Multiple MFHD' and a main area with a tab labeled 'MFHD'. Inside the 'MFHD' tab, there are several input fields and a section for copy numbering.

Main Tag: [Text input field]

Main Tag ind1: [Text input field] **Main Tag ind2:** [Text input field]

Subfields for Item Fields:

- Location code:** [Text input field] **Barcode:** [Text input field]
- Item type:** [Text input field] **Item note:** [Text input field]
- Enum:** [Text input field] **Charge note:** [Text input field]
- Chron:** [Text input field] **Caption:** [Text input field]
- Year:** [Text input field] **Freetext:** [Text input field]
- Pieces:** [Text input field] **Price:** [Text input field]
- Copy number:** [Text input field]

If Copy Number Not Present or Not Specified Above:

- ☒ Single Copy = 0; Multiple Copy = 1, 2, 3...
- ☐ Sequentially number copies starting with [0]
- ☐ Number all copies [0]

Figure 4-16. Multiple MFHD Dialog Box Main Tag and Subfields for Item Fields Areas

Table 4-22. Profiles tab options

Option	Description
Multiple button / Multiple MFHD dialog box	Use the options provided in this area (see Figure 4-17) when you select MFHD grouping (Create a MFHD for each location and group items with same location under that MFHD) to indicate how to handle additional 852 subfields.
Additional 852 Subfields, if desired area	

Additional 852 Subfields, if desired

When MFHD grouping is used, the information from the first item tag of the group will be used in the following subfields:

- \$b is assigned from the location mapping
- call numbers in \$h and \$i are assigned through the Call Number hierarchy

Indicate the item tag subfield whose contents will be placed in the following 852 subfields. For example, if the item tag subfield c contains the copy number, you want that to be put into 852 \$t - so place 'c' in the box next to 'copy number (\$t)'.

Shelving control number (\$i):		Shelving form of title (\$l):	
Call number prefix (\$k):		Call number suffix (\$m):	
Non-public note (\$x):		Public note (\$z):	
Copy number (\$t):			
Piece designation, e.g. barcode, if you want the barcode in the holding record (\$p):			

Figure 4-17. Additional 852 Subfields, if desired

Table 4-22. Profiles tab options

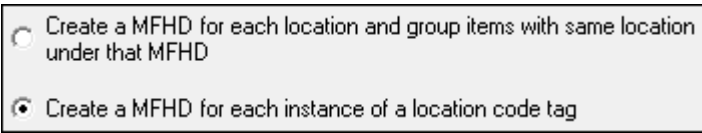
Option	Description
Multiple button / Multiple MFHD dialog box Create options area	Select one of the following radio button options (see Figure 4-18): • Create a MFHD for each location and group items with same location under that MFHD • Create a MFHD for each instance of a location code tag NOTE: The system creates two line items if you select to have separate MFHDs for each instance of a location or one line item with multiple copies if you select to have a single MFHD with multiple items. Usage example: <pre>949\$a main \$b 99874 \$h PN 567 .R45 \$t book 949\$a main \$b 99875 \$h PN 571 .R45 \$t book 949\$a bio \$b 99876 \$h PN 584 .R45 \$t book</pre> Two MFHDs are created for this example when the first radio button is selected (grouped by location). Three MFHDs are created for this example when the second radio button is selected.  Figure 4-18. Create Options
Multiple button / Multiple MFHD dialog box Vendor Reference Number (for matching only) area	Vendor Reference Number (for matching only) displays with the Multiple button only when the Update Previously loaded MFHDs and/or Items is checked. Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the vendor reference number, used for matching, is in the record that is being imported. The Vendor Reference Number area dynamically displays on the Multiple MFHD dialog box when you select the Update previously loaded MFHDs and/or Items option from the Profiles tab. The reference number is used to match the purchase order line item information with MFHD and item record updates in the MARC database. See Figure 4-19 below.

Table 4-22. Profiles tab options

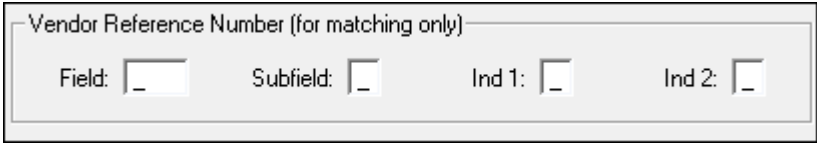
Option	Description
	
Figure 4-19. Vendor Reference Number Field Specifications	
Single/Multiple MFHD options	
Copy 852-855, 863-878 Fields From Bib to MFHD	Select this option to enable holdings fields from the imported bibliographic record to be automatically copied into the newly created MFHD when one of the following Bulk Import Rules is selected: • Single Bibs, MFHDs Bibs, MFHDs, POs Bibs, MFHDs, Items Bibs, MFHDs, POs, Items NOTE: Effective with the Voyager 9.2 release, this option/check box is disabled for the following Multiple MFHD types: - Bibs, MFHDs, POs - Bibs, MFHDs, multiple Items - Bibs, MFHDs, multiple Items, POs - Updated previously loaded MFHDs and/or Items Additionally, when you upgrade from a version prior to Voyager 9.2, this option will be disabled for any existing Multiple MFHD type profiles that have this option selected. For more information regarding how to handle the 852 field, refer to the row in this table that describes <i>Multiple button / Multiple MFHD dialog box, Additional 852 Subfields, if desired area</i> (see Figure 4-17).

Table 4-22. Profiles tab options

Option	Description
Copy 856 Field From Bib to MFHD	Select this option to enable the 856 field from the imported bibliographic record to be automatically copied into the newly created MFHD. NOTE: This option is available only after the Copy 852-855, 863-878 Fields From Bib to MFHD option is selected.
Create one PO per bibliographic record	Select this option to create one purchase order for each bibliographic record. If this options is not selected, one PO is created for each bibliographic file that is imported.

Table 4-22. Profiles tab options

Option	Description
Automatically Approve all POs	Select this option to automatically approve purchase orders when imported. This option applies to both methods of storing POs: • One PO per bibliographic record imported • One PO per bibliographic file imported NOTE: An entry is made in the log file if a PO cannot be approved. The log entry contains the PO number and ID, and the PO is left in a Pending status.
Create PO/MFHD/Item for existing Bibs	Select this option to add MFHDs, items, and PO line items when the incoming bibliographic record is not added to the database, that is, when the bibliographic record already exists. This feature works (is active) when the bibliographic duplicate detection profile uses the replace, add-conditional, or merge options. This function can help to reduce the number of identical bibliographic records and concatenate the holdings of multiple libraries' items and PO line items under one bibliographic record in the database. NOTE: This option enables MFHDs, Items, and PO line items to be added even when the bibliographic record does not win the quality hierarchy and is discarded. Also, MFHDs, Items, and PO line items are not added when the maximum number of duplicate bibliographic records is detected. NOTE: This option cannot be used with the Update previously loaded MFHDs and/or Items option.

OPTIONAL:

7. Click the **Orders** button and enter the options (see [Figure 4-20](#) and [Figure 4-21](#)) that match your requirements to define from where to extract acquisitions data that has been embedded into your bibliographic records and automatically convert it to purchase orders and line items during bulk import.

See Appendix [C](#) for more information about embedded order data, and see [Table 4-23](#) for a description of the options available with the Orders button.

The Orders button is only active when the following is selected:

- Single MFHD area
 - Bibs, MFHDs, POs
 - Bibs, MFHDs, POs, Items
- Multiple MFHD area
 - Bibs, MFHDs, POs
 - Bibs, MFHDs, multiple Items, POs

The screenshot shows the 'Cataloging Bulk Import Order Settings' dialog box with the 'Order / Vendor' tab selected. The dialog is organized into several sections with input fields and checkboxes.

Order Location: Acquisitions (dropdown) **Order Type:** Firm Order (dropdown)

PO Number: Field: [] Subfield: [] Ind 1: [] Ind 2: []

Line Item Type: Field: [] Subfield: [] **Default:** Single-part (dropdown) Ind 1: [] Ind 2: []

Vendor: Code: BT (dropdown) Acct: []

Vendor Reference Number: Field: [] Subfield: [] Ind 1: [] Ind 2: []

Vendor Title: Field: [] Subfield: [] Ind 1: [] Ind 2: []

Piece Id: Field: [] Subfield: [] Ind 1: [] Ind 2: []

Number of Copies per Line Item: Field: [] Subfield: [] **Default:** 1 (spin box) Ind 1: [] Ind 2: []

Notes: Field: [] Subfield: [] Ind 1: [] Ind 2: []

Instructions: Field: [] Subfield: [] Ind 1: [] Ind 2: []

Requester: Field: [] Subfield: [] Ind 1: [] Ind 2: []

Buttons: OK, Cancel

Figure 4-20. Order Button Options - Order/Vendor Tab

The screenshot shows the 'Cataloging Bulk Import Order Settings' dialog box with the 'Price / Fund' tab selected. The dialog is divided into four main sections: Price, Fund, Ledger Name, and Fiscal Period Name. Each section contains fields for Field, Subfield, Ind 1, Ind 2, and a Default field. The Price section has a Currency dropdown set to 'USD'. The Fund section has a Default Code dropdown set to 'Tax'. The Ledger Name section has Field set to '964' and Subfield set to 'a'. The Fiscal Period Name section has Field set to '964' and Subfield set to 'b'. At the bottom are 'OK' and 'Cancel' buttons.

Section	Field	Subfield	Ind 1	Ind 2	Default
Price					\$0.00
Fund					Tax
Ledger Name	964	a			<no default selected>
Fiscal Period Name	964	b			Rational FP

Figure 4-21. Order Button Options - Price/Fund Tab

Many of the options entered or selected on the Cataloging Bulk Import Order Settings dialog box are created/maintained in the Acquisitions configuration within Voyager System Administration or through the Acquisitions module. Bulk Import simply uses the options that have already been created and uses them for importing embedded order data (EOD).

Table 4-23. Orders options

Option	Description
Order/Vendor tab	
Order Location	Specify the Location of the order. This is the same as the (order) Site field on the Header tab of the Purchase Order Header information in Acquisitions. This is a required field.

Table 4-23. Orders options

Option	Description
Order Type	Specify the type of order that is to be created. This is the same as the (order) Type field on the Header tab of the Purchase Order Header information in Acquisitions. This is a required field.
PO Number	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the PO number is to be found in the record that is being imported. The PO number field is used when you have selected the Create one PO per bibliographic record option (see Table 4-22) on the Profiles tab.
Line Item Type: Field, Subfield, Indicator 1, Indicator 2, Default	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the line item type is to be found in the record that is being imported. Click the Default drop-down to select a default item type to be used if there is no item type in the record being imported. NOTE: When using bulk import to create multiple items each line item may have the same line item type or a different line item type. When the line item type is on the same tag as the main tag for the MFHDs, each line item can have a different line item type when using bulkimport to create multiple items for a purchase order. If the line item type is on the same tag as the main tag, bulkimport uses the line item type in each item of the imported bibliographic records and places it in the line item as the line item type. If the line item type is on a different tag than the main tag, bulkimport gives each line item the same line item type. This is a required field.
Vendor: Code, Acct	Code. Use the Code field to specify the vendor code for the vendor from whom the records came. Select the Code from the drop-down list or click the ellipsis button to display the pop-up window (if your list of vendors is greater than 5,000). Acct. Use the Acct field to specify the vendor account for the vendor from whom the records came. This is a required field. NOTE: You need a different Bulk Import profile for each vendor.

Table 4-23. Orders options

Option	Description
Vendor Reference Number: Field, Subfield, Indicator 1, Indicator 2	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the vendor reference number is to be found in the record that is being imported (creating the vendor reference number initially for later updates). The vendor reference number is stored in the PO line item and is used to match the purchase order line item information with MFHD and item record updates in the MARC database. Updates using the vendor reference number occur when you select the Create PO/ MFHD/Item for existing Bibs option (see Table 4-22) on the Profiles tab. The type of vendor reference number that is added is VN (Vendor Number). NOTE: When using bulk import to create multiple items each line item may have the same vendor reference number or a different vendor reference number. When the vendor reference number is on the same tag as the main tag for the MFHDs, each line item can have a different vendor reference number when using bulkimport to create multiple items for a purchase order. If the vendor reference number is on the same tag as the main tag, bulkimport uses the vendor reference number in each item of the imported bibliographic record and places that in the line item. If the vendor reference number is on a different tag than the main tag, bulkimport gives each line item the same vendor reference number.
Vendor Title: Field, Subfield, Indicator 1, Indicator 2	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the vendor title is to be found in the record that is being imported. NOTE: When using bulk import to create multiple items each line item may have the same vendor title or a different vendor title. When the vendor title is on the same tag as the main tag for the MFHDs, each line item can have a different vendor title when using bulkimport to create multiple items for a purchase order. If the vendor title is on the same tag as the main tag, bulkimport uses the vendor title in each item of the imported bibliographic record and places that in the line item vendor title. If the vendor title is on a different tag than the main tag, bulkimport gives each line item the same vendor title.

Table 4-23. Orders options

Option	Description
Piece ID: Field, Subfield, Indicator 1, Indicator 2	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the piece ID is to be found in the record that is being imported. This corresponds to the Starting Piece Identification field on the Type tab of the line item in Acquisitions. NOTE: When using bulk import to create multiple items each line item may have the same piece ID or a different piece ID. When the piece ID is on the same tag as the main tag for the MFHDs, each line item can have a different piece ID when using bulkimport to create multiple items for a purchase order. If the piece ID is on the same tag as the main tag, bulkimport uses the piece ID in each item of the imported bibliographic record and inserts that as the line item piece ID. If the piece ID is on a different tag than the main tag, bulkimport gives each line item the same piece ID.
Number of Copies per Line Item: Field, Subfield, Indicator 1, Indicator 2, Default	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where copy information is to be found in the incoming record. Enter a default number of ordered copies into the Default field to be used if there is no copy data in the record being imported. This is the number of copies ordered for the line item. NOTE: This is not the item copy number. NOTE: When using bulk import to create multiple items each line item may have the same number of ordered copies or a different number of ordered copies. When the number of ordered copies is on the same tag as the main tag for the MFHDs, each line item can have a different number of ordered copies when using bulkimport to create multiple items for a purchase order. If the number of ordered copies is on the same tag as the main tag, bulkimport uses the number of ordered copies number in each item of the imported bibliographic record and places that in the line item as the number of copies per line item. If the number of ordered copies is on a different tag than the main tag, bulkimport gives each line item the same number of copies per line item. This is a required field.

Table 4-23. Orders options

Option	Description
Notes: Field, Subfield, Indicator 1, Indicator 2	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where notes are to be found in the record that is being imported. This inserts a Note for the line item on the Purchase Order. NOTE: When using bulk import to create multiple items each line item may have the same note or a different note. When the note is on the same tag as the main tag for the MFHDs, each line item can have a different note when using bulkimport to create multiple items for a purchase order. If the note is on the same tag as the main tag, bulkimport uses the note in each item of the imported bibliographic record and places that in the line item note. If the note is on a different tag than the main tag, bulkimport gives each line item the same note.
Instructions: Field, Subfield, Indicator 1, Indicator 2	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where instructions to the vendor are to be found in the record that is being imported. This inserts an Instruction for the line item on the Purchase Order. NOTE: When using bulk import to create multiple items each line item may have the same instructions or different instructions. When the instructions are on the same tag as the main tag for the MFHDs, each line item can have different instructions when using bulkimport to create multiple items for a purchase order. If the instructions are on the same tag as the main tag, bulkimport uses the instructions in each item of the imported bibliographic record and places them in the line item instructions. If the instructions are on a different tag than the main tag, bulkimport gives each line item the same instructions.
Requester: Field, Subfield, Indicator 1, Indicator 2	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the requester information is to be found in the record that is being imported. The requester field is added to the new PO line item that is created. NOTE: When using bulk import to create multiple items each line item may have the same requester or a different requester. When the requester is on the same tag as the main tag for the MFHDs, each line item can have a different requester when using bulkimport to create multiple items for a purchase order. If the requester is on the same tag as the main tag, bulkimport uses the requester in each item of the imported bibliographic record and places that as the line item requester. If the requester is on a different tag than the main tag, bulkimport gives each line item the same requester.

Table 4-23. Orders options

Option	Description
Price/Fund tab	
Price: Field, Subfield, Indicator 1, Indicator 2 Currency	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the price is to be found in the record that is being imported. Enter a price into the Default field that is to be used if there is no price in the record being imported. This is used for the list price of the line item. NOTE: When entering an amount in the Default field, both dollars and cents need to be specified. For example \$10.00 versus \$10. NOTE: When using bulk import to create multiple items each line item may have the same price or a different price. When the price is on the same tag as the main tag for the MFHDS, each line item can have a different price when using bulkimport to create multiple items for a purchase order. If the price is on the same tag as the main tag, bulkimport uses the price in each item of the imported bibliographic record and places it in the line item price. If the price is on a different tag than the main tag, bulkimport gives each line item the same price. This is a required field. ----- Select a currency code from the Currency drop-down list to specify the currency of the Purchase Order. This is a required field.

Table 4-23. Orders options

Option	Description
Fund: Field, Subfield, Indicator 1, Indicator 2 Default Code	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where fund information is to be found in the incoming record. Click the Default Code drop-down list to select a default fund code to be used if there is no fund code indicated in the record being imported. The drop-down list is a summary of all fund codes created in Acquisitions as defined by your institution. NOTE: When using bulk import to create multiple items each line item may have the same fund code or a different fund code. When the fund code is on the same tag as the main tag for the MFHDs, each line item can have a different fund code when using bulkimport to create multiple items for a purchase order. If the fund code is on the same tag as the main tag, bulkimport uses the fund code in each item of the imported bibliographic record and places it in the line item fund code. If the fund code is on a different tag than the main tag, bulkimport gives each line item the same fund code. The fund code from the incoming record must be valid (an exact match of what is stored in Acquisitions) or the default code is used.  IMPORTANT: <i>When fund code information is provided to a vendor for EOD purposes, be certain to specify the case that is used (upper-, lower-, or mixed-case) to insure that the intended fund code is used when the data is imported.</i> This is a required field. NOTE: Voyager uses the fund code in combination with the ledger value (determined by location code/site) to determine if a line item is to be added to a purchase order. If there is no match or two or more funds match the criteria given, BulkImport logs an error message and does not load the incoming line item. The order location and the fund code must be selected in the same ledger. See the Locations tab in the Ledger section of the Acquisitions module. If these are not properly selected, the line item is not added to the purchase order; and there is an error logged to the BulkImport log. (The bibliographic record, however, is added to the database but not the purchase order.) The same fund code may be applied to the same fund in different ledgers with different fiscal periods. BulkImport applies the most recent fund code, the fund code with the most current fiscal period.

Table 4-23. Orders options

Option	Description
Ledger Name: Field, Subfield, Indicator 1, Indicator 2, Default	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the ledger name is to be found in the record that is being imported. Select a ledger from the Default drop-down list that is to be used if there is no ledger name in the record being imported. Make sure the Ledger Name you select contains the Default Code selected in the Fund area. NOTE: When using bulk import to create multiple items each line item may have the same ledger name or a different ledger name. When the ledger name is on the same tag as the main tag for the MFHDs, each line item can have a different ledger name when using bulkimport to create multiple items for a purchase order. If the ledger name is on the same tag as the main tag, bulkimport uses the ledger name in each item of the imported bibliographic record and uses that for the line item ledger name. If the ledger name is on a different tag than the main tag, bulkimport gives each line item the same ledger name.
Fiscal Period: Field, Subfield, Indicator 1, Indicator 2, Default	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the fiscal period is to be found in the record that is being imported. Select a fiscal period from the Default drop-down list that is to be used if there is no fiscal period specified in the record being imported. The fiscal period must match the fiscal period of the default Fund selected. The purpose of this field is for overlapping fiscal periods.

8. Click the **Item Type** tab (for Single MFHD profiles only).

NOTE:

You only need to specify **Item Type** options when creating item records using one of the Single MFHD profile options.

Result: The **Item Type** dialog box opens. See [Figure 4-22](#).

Edit Bulk Import Rule:

Rule Name | Rules | Profiles | **Item Type** | Mapping | Barcode | Item Information

Indicator 1	Indicator 2	Field	Subfield
*	*	049	a

Priority: [Up Arrow] [Down Arrow]

[Add] [Modify] [Remove]

Figure 4-22. Item Type tab

- Click **Add** and enter the options that match your requirements to define the indicators, fields, and subfields in the incoming MARC bibliographic record that are checked for item type information. See [Table 4-24](#) for a description of available options on the **Item Type** tab.

Result: The **Item Type** tab component of the new **Bulk Import Rule** is complete.

Table 4-24. Item Type tab options

Option	Description
Field	Specify the field to be checked in the incoming record.
Subfield	Specify the subfield to be checked in the incoming record.
Indicator 1	Enter a numeric value 0 -9. Enter an underscore () to indicate a space. Use the asterisk (*) as a wild-card character which means that any value is acceptable.
Indicator 2	Enter a numeric value 0 -9. Enter an underscore () to indicate a space. Use the asterisk (*) as a wild-card character which means that any value is acceptable.

NOTE:

You must have an item type hierarchy defined if the item type information in the incoming MARC records can be found in multiple fields.

Use the up and down arrows to arrange the item type hierarchy in the proper order. The hierarchy defines which field is searched first in the incoming record for the item information. If it is not found in the first field of the hierarchy, the system searches the second field specified in the hierarchy.

10. Click the **Mapping** tab. (Options specified on the **Mapping** tab are used when creating holdings records.)

NOTE:

You only need to specify **Mapping** options when creating MFHD (holdings) records with either the Single MFHD or Multiple MFHD profile options.

Result: The **Mapping** dialog box opens.

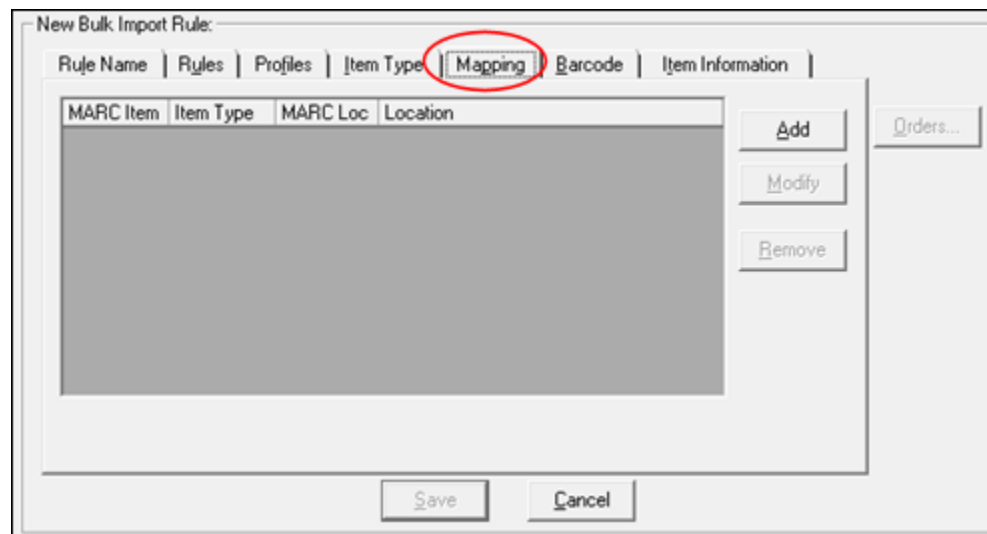
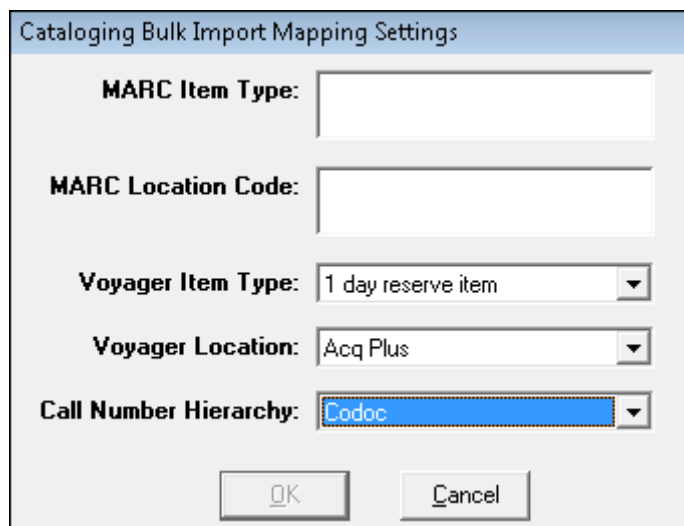


Figure 4-23. Bulk Import Rule Mapping Tab

11. Click **Add** and enter the options that match your requirements to create a hierarchy for location and item information within the imported records.



The image shows a dialog box titled "Cataloging Bulk Import Mapping Settings". It contains five input fields and two buttons at the bottom. The fields are: "MARC Item Type" (empty text box), "MARC Location Code" (empty text box), "Voyager Item Type" (dropdown menu showing "1 day reserve item"), "Voyager Location" (dropdown menu showing "Acq Plus"), and "Call Number Hierarchy" (dropdown menu showing "Codoc"). The "OK" and "Cancel" buttons are at the bottom right.

Figure 4-24. Bulk Import Rule Mapping Tab Settings

See [Table 4-25](#) for a description of available options in the Cataloging Bulk Import Mapping Settings dialog box accessed from the **Add** or **Modify** actions on the **Mapping** tab.

Result: The **Mapping** tab component of the new **Bulk Import Rule** is complete.

Table 4-25. Mapping tab options

Option	Description
MARC Item Type	Enter the item type such as book, map, periodical, or video which appears as a text string in the incoming MARC records. Specify an asterisk in this field to indicate that a record in Voyager should be created even if there is no data in this field from the incoming record.
MARC Location Code	Enter the location type such as reference, reserve, or periodical which appears as a text string in the incoming MARC records. Specify an asterisk in this field to indicate that a record in Voyager should be created even if there is no data in this field from the incoming record.

Table 4-25. Mapping tab options

Option	Description
Voyager Item Type	Select the Voyager item type from the drop-down list to which you want the MARC Item Type mapped. You must have selected one of the options on the Rules tab that creates item records in order to successfully import item information.
Voyager Location	Select the Voyager location from the drop-down list to which you want the MARC Location information mapped. You must have selected one of the options on the Rules tab that creates MFHDs to successfully import location information.
Call Number Hierarchy	The Bulk Import program uses the selected Call Number Hierarchy to pull call number information from the incoming MARC record and add it to the new 852 holdings record in the \$h and \$i subfields. You must have at least one Call Number Hierarchy defined in Cataloging - Call Number Hierarchy to make a selection in this field. You must have selected one of the options on the Rules tab that creates MFHDs to successfully import call number information.

NOTE:

The **Mapping** tab must have a default setup identifying a mapping that contains an asterisk (*) in the **MARC Item Type** and **MARC Location** fields as one of the options in the hierarchy when using one of the options that creates a MFHD or item. This entry in the hierarchy list is required for times when the BulkImport program cannot find the appropriate data from the incoming MARC record to map into the Voyager record. The asterisk acts as a wildcard that causes the BulkImport program to create a record using the Voyager options specified.

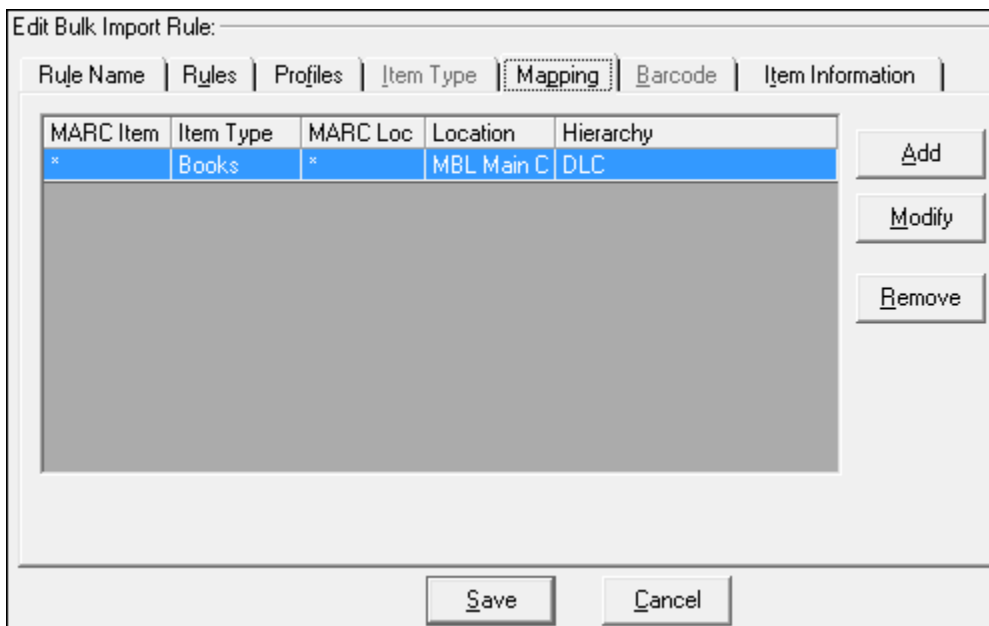


Figure 4-25. Bulk Import Rule Default Mapping Setting with Asterisks

It is best that this entry reside as the last entry in the hierarchy guaranteeing an item type and location entry if all other mapping choices in the hierarchy fail. The Bulk Import program processes the hierarchical listing starting with the first entry in the list and working through the list sequentially until it finds a match.



IMPORTANT:

If you are using a rule that creates multiple MFHDs and you're creating MFHDs for multiple locations, be sure that you have mapped each MFHD location in the Mapping tab. For any location not mapped, MFHDs are created only for the default location.

12. Click the **Barcode** tab (for Single MFHD profiles only).

NOTE:

You only need to specify **Barcode** options when creating item records via BulkImport and the incoming bibliographic records have barcode data.

Result: The **Barcode** dialog box opens. See [Figure 4-26](#).

Edit Bulk Import Rule:

Rule Name | Rules | Profiles | Item Type | Mapping | **Barcode** | Item Information

Indicator 1	Indicator 2	Field	Subfield
*	*	245	a

Priority: [Up Arrow] [Down Arrow]

[Add] [Modify] [Remove]

Figure 4-26. Barcode tab

13. Click **Add** and enter the options that match your requirements to define the indicators, fields, and subfields that identify the location of barcode information in the incoming MARC record. See [Table 4-26](#) for a description of available options on the **Barcode** tab.

Result: The **Barcode** tab component of the new **Bulk Import Rule** is complete.

Table 4-26. Barcode tab options

Option	Description
Field	Specify the field to be checked in the incoming record.
Subfield	Specify the subfield to be checked in the incoming record.
Indicator 1	Enter a numeric value 0 -9. Enter an underscore () to indicate a space. Use the asterisk (*) as a wildcard character which means that any value is acceptable.
Indicator 2	Enter a numeric value 0 -9. Enter an underscore () to indicate a space. Use the asterisk (*) as a wildcard character which means that any value is acceptable.

14. Click the **Item Information** tab (see [Figure 4-27](#)) and enter the item options to match your requirements. See [Table 4-27](#) for a description of the **Item Information** tab options.

Figure 4-27. Item Information tab

Table 4-27. Item Information tab options

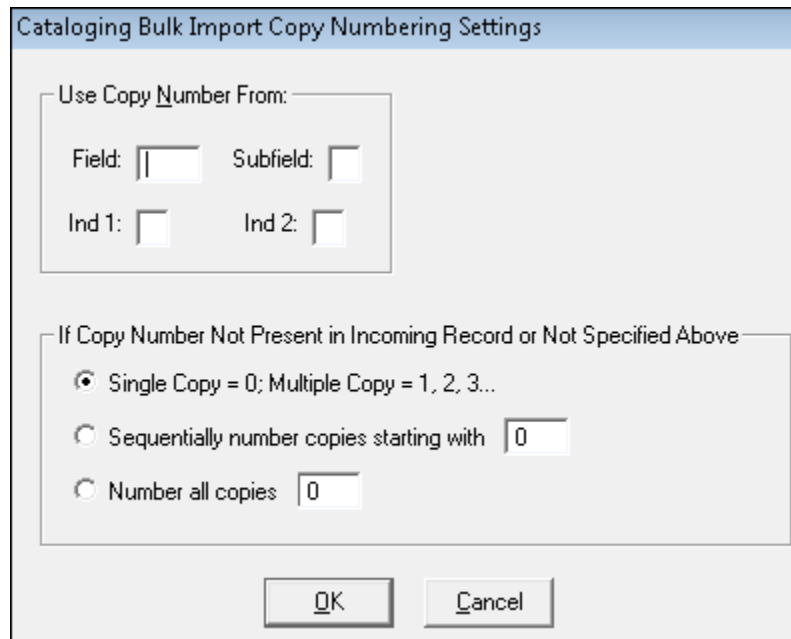
Option	Description
Item statuses to add	Select one or more of the following options to specify the status for the item created: • At Bindery • Cataloging Review • Circulation Review • Damaged • In Process • Lost - Library Applied • Missing • Withdrawn See the <i>Voyager Cataloging User's Guide</i>, the <i>Voyager Circulation User's Guide</i>, and/or the <i>Voyager WebVoyage User's Guide</i> for a discussion about Item Statuses.

Table 4-27. Item Information tab options

Option	Description
Copy Numbers	Use this function to open the Cataloging Bulk Import Copy Numbering Settings dialog box (see Figure 4-28) to configure how to specify copy numbers for items being created using bulk import. This dialog box has the following components: • Use Copy Number From • If Copy Number Not Present in Incoming Record or Not Specified Above (in the Use Copy Number From section) The default configuration setting (Single Copy=0; Multiple Copy=1, 2, 3) is for pre-Voyager 9.1 functionality where the copy number defaults to zero when one copy/item is created; and when multiple copies/items are created, the copy number defaults to starting with the number one as in copies numbered 1, 2, and 3 for three new copies. The other configuration options enable you to: • Specify a field, subfield, indicator 1, and/or indicator 2 (minimally field and subfield) to map/match incoming records with existing records to use the subfield's copy value in the item created. For cases where the specified MARC tag is repeated (and the MARC tag for the copy number is different from the MARC tag for the MFHD/item) but there are not enough copy number tag/subfield values for all the items to be created, the system uses the copy number/subfield information available; and for the remaining items to be created, it switches to the If Copy Number Not Present configuration setting to determine what to specify for an item's copy number. For cases where the specified MARC tag is repeated (and the MARC tag for the copy number is the same as the MARC tag for the MFHD/item) but there are not enough copy number tag/subfield values for all the items to be created, the system uses the copy number/subfield information available; and for the remaining items to be created, it uses 0 for the item's copy number. (Setting the MARC tag for the copy number in the bulk import profile to be the same MARC tag as specified for the MFHD/item is the most ideal, best practice to use.) For cases where there is no matching field in the incoming record, the matching field's value is not numeric, or no copy number fields are specified, the system uses the configuration setting specified in the If Copy Number Not Present in Incoming Record or Not Specified Above section. • Specify a start number for sequentially numbering multiple copies. • Specify a single number, the same number for all copies. For multi-volume sets, see the following example. If you are using the 749 field to map item information and you are importing a two-volume set with each volume to have separate item records but the same copy number, you can 1) supply the copy number in the 749 \$a if the Use Copy Number From field is set to Field=749, Subfield=a, Ind 1=7, Ind 2=8; or you can 2) set up If Copy Number Not Present in Incoming Record or Not Specified Above with Number All Copies selected. MFHD rules determine if multiple MFHDs are created for each instance of the location or if multiple copies and volumes are grouped under the same MFHD.

Table 4-27. Item Information tab options

Option	Description
Magnetic Media	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the magnetic media alert condition is to be found in the record that is being imported. For the Value to match option, specify the content in the incoming record upon which the system should check for a match. For example, you may specify the content of CD in the location field. When the imported content matches the content specified for this option, the system sets the magnetic media flag in the database to Y (yes). Refer to the <i>Cataloging User's Guide</i> for additional information regarding magnetic media alerts. NOTE: This option is for use with Single MFHD (Profiles tab) import rules only.
Sensitize	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the sensitize alert condition is to be found in the record that is being imported. For the Value to match option, specify the content in the incoming record upon which the system should check for a match. When the imported content matches the content specified for this option, the system sets the sensitize flag in the database to Y (yes). Refer to the <i>Cataloging User's Guide</i> for additional information regarding sensitize alerts. NOTE: This option is for use with Single MFHD (Profiles tab) import rules only.



The dialog box is titled "Cataloging Bulk Import Copy Numbering Settings". It contains two main sections. The first section, "Use Copy Number From:", has four input fields: "Field:" (with a dropdown arrow), "Subfield:" (with a dropdown arrow), "Ind 1:" (with a dropdown arrow), and "Ind 2:" (with a dropdown arrow). The second section, "If Copy Number Not Present in Incoming Record or Not Specified Above", contains three radio button options: "Single Copy = 0; Multiple Copy = 1, 2, 3..." (which is selected), "Sequentially number copies starting with" (followed by a text box containing "0"), and "Number all copies" (followed by a text box containing "0"). At the bottom of the dialog are "OK" and "Cancel" buttons.

Figure 4-28. Cataloging Bulk Import Copy Number(s) Configuration

15. Click **Save** or click **Cancel**.

Result: This saves or cancels the entire Bulk Import Rule.

NOTE:

When you save a Bulk Import Rule, the system checks for complementary options that need to be selected. If those are absent, a pop-up window opens with one or more messages, and you are prevented from saving the rule. See [Figure 4-29](#) for the messages that display when you have an error in the complementary selections that you need to make.

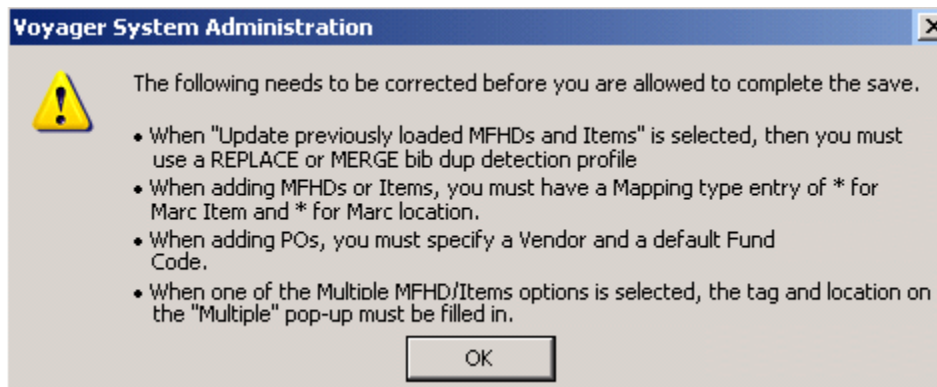


Figure 4-29. Possible Pop-up Error Messages with Save

Processing Records with Update Previously Loaded MFHDs and/or Items

With the Update previously loaded MFHDs and/or Items option (see [Figure 4-15](#)), designed to enhance EOD processing, bulk import automatically updates multiple MFHD and item records for each bibliographic record from the incoming MARC data for previously loaded MFHDs and items. For the system to do this, it uses the following methods for matching records to be updated:

- [Matching Bibliographic Record and PO Information](#)
- [MFHD Location Matching](#)

And you must use a bibliographic duplicate detection profile that is set to Replace, Merge, or Bi-Directional Merge.

The prerequisites for using this option are:

- A PO and line item must have been created for the bibliographic record, either with bulk import or manually
- A vendor reference number must be added to the PO line item in the Vendor Reference Number (see [Figure 4-30](#)), either with bulk import or manually
- A holdings (MFHD) record must have been created for the bibliographic record for the location of the to-be-updated item or MFHD, attached to the PO

- If items are to be updated, the items must be attached to the PO, too, with the same location as the location for the incoming item information

NOTE:

Location in the item cannot be updated.

Figure 4-30. Acquisitions - PO Vendor Reference Number

Matching Bibliographic Record and PO Information

The matching conditions are:

- An incoming bibliographic record must match a bibliographic record in database, that is, bibliographic duplicate detection succeeds. If no matching bibliographic record is found, the incoming bibliographic record is not added
- A record in the database must have a PO and a line item. If there is no PO and line item found, loading the incoming record fails.

- A PO line item must have a vendor reference number (see [Figure 4-30](#)) that is an exact match for the vendor reference number in the incoming bibliographic record. If there is no match, loading the incoming record fails.

If any of the above fail, the bulk import log is updated with a description of the failure.

MFHD Location Matching

With this matching method, MFHDs and items are checked in the following manner:

- The location in the incoming record is evaluated against the location mapping identified on the item type Mapping tab of bulk import. The mapped item location is compared to the item location of the item in the database.
- If the mapped location matches a MFHD associated with the bibliographic record/PO line Item (like the matching in [Matching Bibliographic Record and PO Information](#) on [page 4-77](#)), the MFHD can be updated. If not, an error is written to the bulk import log.
- If there are multiple locations in the incoming file, all incoming locations must match all MFHDs attached to bibliographic record/PO line items.

NOTE:

Remember to select the Create a MFHD for each location and group items with same location under that MFHD or Create a MFHD for each instance of a location code tag option (see [Figure 4-16](#)).

- If there are no items in the database for the bibliographic record, the system proceeds to create items for the record making certain to assign items to the appropriate MFHD by location.
- If there are items in the database for the bibliographic record which fall under the matched PO line and MFHD location(s), the option (see [Figure 4-16](#)) for the number of items that would potentially be created for each location of the matched PO line is checked.
- If the number of potential items for each location matches the actual number of items in the database for each location, this is a successful match; and the system updates those items. If there is not a successful match, no change is made and an error is written to the bulk import log.



IMPORTANT:

If an item update fails, any MFHD updates that happened are not undone. The MFHD updates are completed before the system processes the item updates.

What Can Be Updated?

If a proper match is found for a bibliographic record (a PO line item and the MFHD location), the system can update a MFHD attached to the PO line item. The only field that can be updated on the existing MFHD is the call number.

NOTE:

It is not possible to add a MFHD for a previously created PO line item.

For item records, the following fields can be updated (see [Figure 4-16](#) and [Figure 4-27](#)):

- Barcode
- Item type
- Item status
- Enumeration
- Chronology
- Year
- Note field (regular note only)

NOTE:

These options are only available when you use a Multiple MFHDs profile for bulk import.

Call Number Change

Optionally, the call number can be updated using the Update previously loaded MFHDs and/or Items option. To accomplish this change, you need to specify where the call number is by specifying the call number hierarchy.

Example:

To give the MFHD a new call number, put the new call number information into a bibliographic tag in the incoming bibliographic record with the location matching like:

```
949 $I ACQ $h PN56 $i .B345
999 $v POMatchNo
```

The match is on the 999 \$v, and you want what is in the \$h and \$i to go into the 852 \$h and \$i in the MFHD.

To specify in the bulk import profile where your call number is, use the Mapping tab; and from the Call Number Hierarchy drop-down list option, select the call number hierarchy profile that you have created for this purpose.

Duplicating Bulk Import Rules

[Procedure 4-4, Duplicating Bulk Import Rules](#), describes the steps to duplicate a bulk import rule.



Procedure 4-4. Duplicating Bulk Import Rules

1. Click **Cataloging** on the vertical listbar.

Result: The Voyager System Administration cataloging options open. See [Figure 4-1](#).

2. Click **Bulk Import Rules**.

Result: The **Cataloging - Bulk Import Rules** dialog box opens. See [Figure 4-31](#).

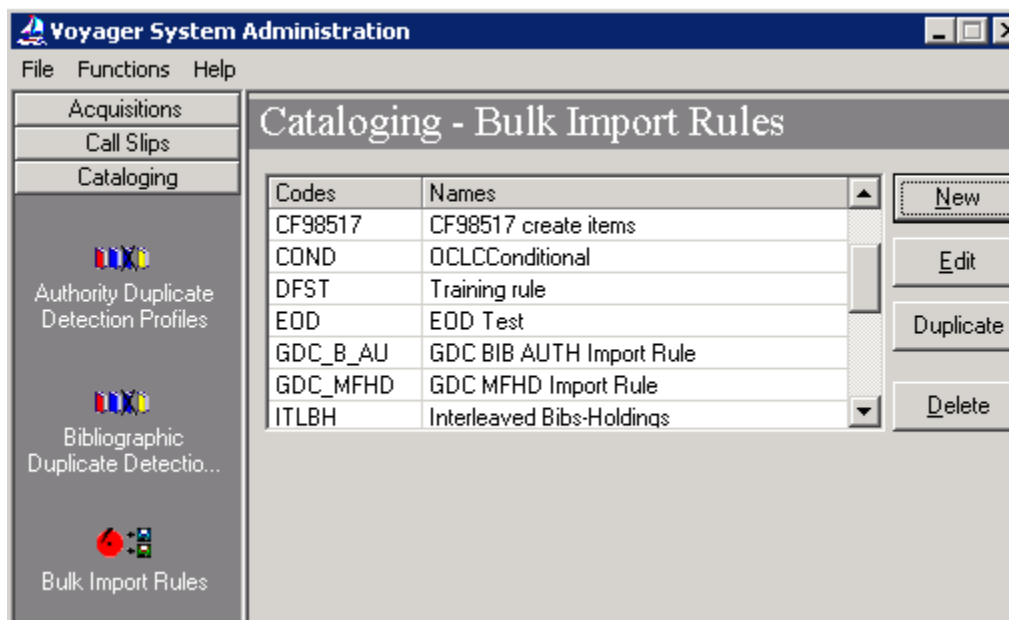


Figure 4-31. Cataloging - Bulk Import Rules

3. Select the bulk import rule to be duplicated from the list of available rules that have already been created, and click **Duplicate**.
4. Enter the code and name for the new (duplicate) rule.

Codes	Names
BIADD	Bulk Import Add Cond SMR
cf129269	cf129269 delete holdings
CF54451	CF54451
CF98517	CF98517 create items
COND	OCLCConditional
DFST	Training rule
EOD	EOD Test

Edit Bulk Import Rule:

Rule Name | Rules | Profiles | Item Type | Mapping | Barcode | Item

Code:

Name:

Figure 4-32. Duplicate bulk import rule

OPTIONAL:

5. *Make changes to the duplicate bulk import rule.*
6. Click **Save**.

Call Number Hierarchy

The Call Number Hierarchy options in Voyager System Administration allow you to specify where in the record to pull call number information to place in the MFHD 852. Configuring a Call Number Hierarchy is required.

Creating Call Number Hierarchy

[Procedure 4-5, Creating Call Number Hierarchy](#),” shows how to create a Call Number Hierarchy.



Procedure 4-5. Creating Call Number Hierarchy

1. Click **Cataloging** on the vertical listbar.

Result: The Voyager System Administration cataloging options display. See [Figure 4-1](#).

2. Click **Call Number Hierarchy**.

Result: The **Cataloging - Call Number Hierarchy** dialog box opens. See [Figure 4-33](#).

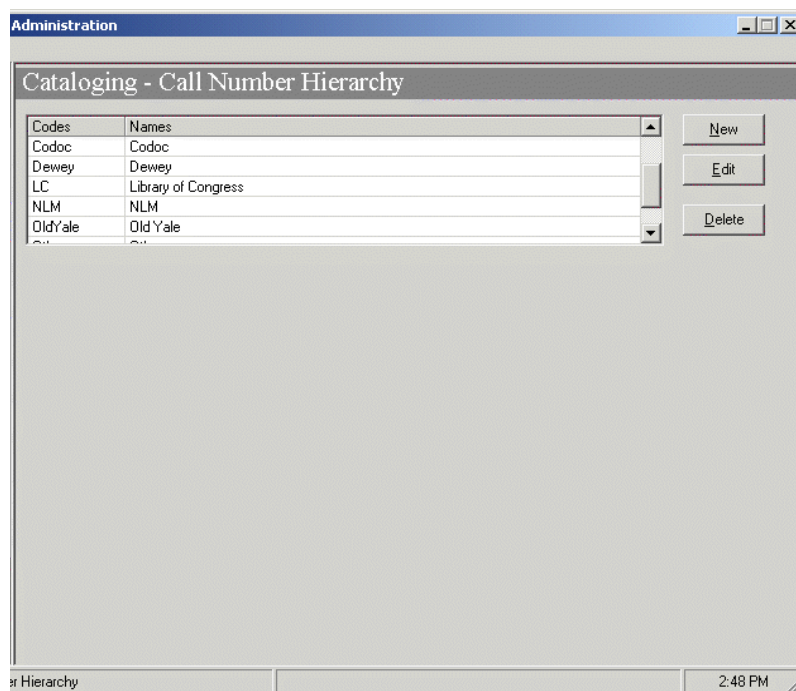


Figure 4-33. Cataloging - Call Number Hierarchy

3. Click **New**.

Result: The **New Call Number Hierarchy** options display. See [Figure 4-34](#).

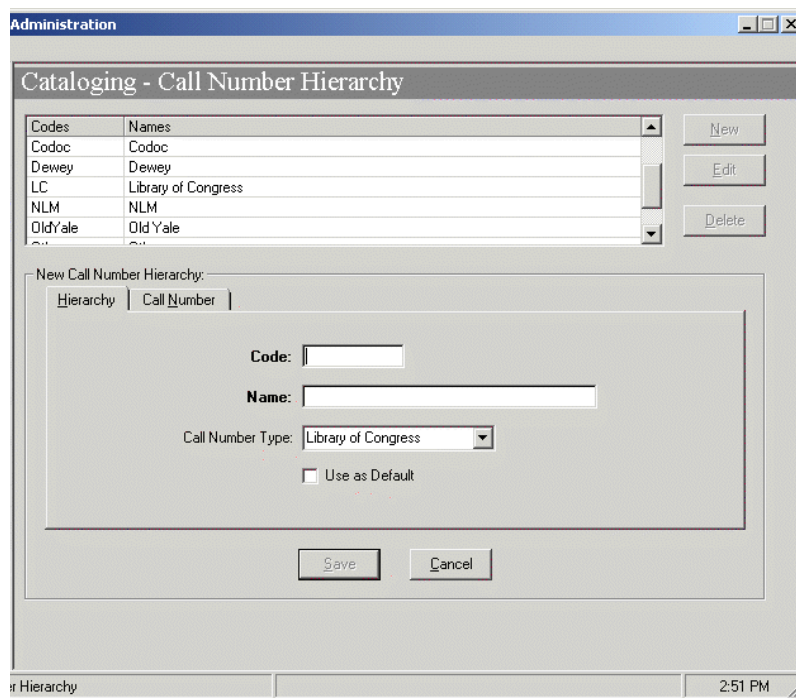


Figure 4-34. Call Number Hierarchy tab options

4. Enter the **Hierarchy** tab options that match your requirements. See [Table 4-28](#) for a description of available options on the **Hierarchy** tab.

Result: The **Hierarchy** tab component of the **New Call Number Hierarchy** is complete.

Table 4-28. Hierarchy tab options

Option	Description
Code	Enter an abbreviated name (code) that identifies the Call Number Hierarchy being defined.
Name	Enter a name that indicates the type of Call Number Hierarchy being defined.
Call Number Type	Specify the call number type such as Library of Congress, Dewey Decimal, or NLM Classification.
Use as Default	Select this option to indicate if you want the hierarchy being defined to be used as the default.

- Click the **Call Number** tab.

Result: The **Call Number** tab options display. See [Figure 4-35](#).

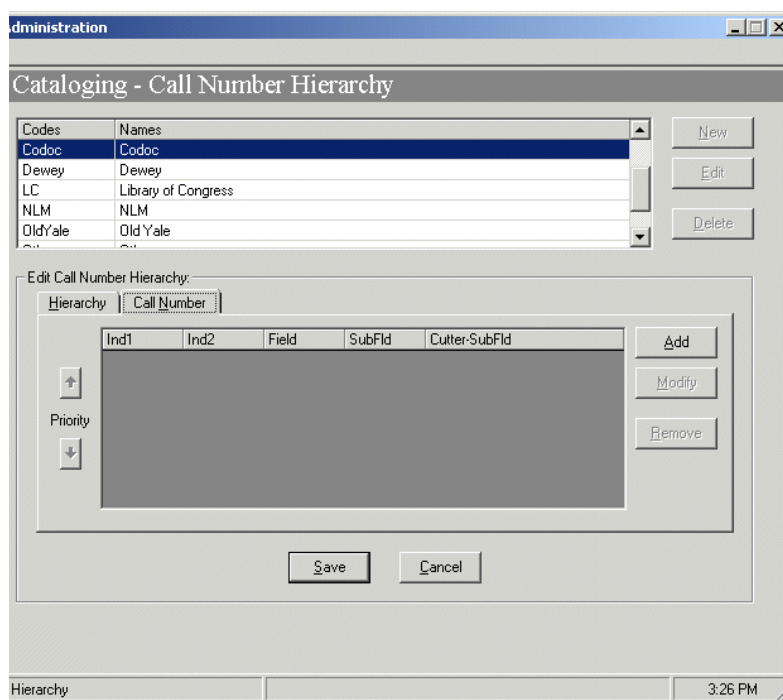


Figure 4-35. Call Number tab

- Enter the **Call Number** tab options that match your requirements. See [Table 4-28](#) for a description of available options on the **Call Number** tab.

Result: The **Call Number** tab component of the **New Call Number Hierarchy** is complete.

Table 4-29. Call Number tab options

Option	Description
Indicator 1	Enter a numeric value 0 -9. Enter an underscore () to indicate a space. Use the asterisk (*) as a wild-card character which means that any value is acceptable.

Table 4-29. Call Number tab options

Option	Description
Indicator 2	Enter a numeric value 0 -9. Enter an underscore (_) to indicate a space. Use the asterisk (*) as a wild-card character which means that any value is acceptable.
Field	This option specifies the Cataloging field where the system looks in the bibliographic record for the call number.
Subfield	Enter the classification number, holdings record 852 \$h.
Cutter Subfield	Enter the item number, 852 \$i.

Use the up and down arrows to arrange the **Call Number** tab hierarchy in the proper order. The hierarchy defines which field is searched first in the incoming record for the call number information. If it is not found in the first field of the hierarchy, the system searches the second field specified in the hierarchy.

NOTE:

Bulk Import: If a bibliographic record contains multiple instances of the call number information specified on the Call Number tab (for example, more than one 090 \$a), it adds the call number information listed last to \$h and \$i of the MFHD.

NOTE:

Cataloging: If a bibliographic record contains multiple instances of the call number information specified on the Call Number tab (for example, more than one 090 \$a), it adds the call number information listed last to \$h and \$i of the MFHD. In addition, the indicators are also considered (see example below), and where there are multiple occurrences of 050 * 4, for example, the last occurrence is used.

050 * 4 \$a \$b
050 * 0 \$a \$b
050 * * \$a \$b

7. Click **Save** or click **Cancel**.

Result: This saves or cancels the **Cataloging Call Number Settings**.

8. Click **Save** or click **Cancel**.

Result: This saves or cancels the entire **Call Number Hierarchy**.

Creating MFHDS

The Cataloging module does not create an 852 field if a MFHD template is used which already contains an 852 field as part of its definition. This is because the system assumes that you do not want to overwrite your template information.

The following describes the process that determines the 852 field of the holdings record.

- When you choose a Holdings/Item default location in Session Defaults and Preferences in the Cataloging module, the Classification Scheme default is associated with that location (set up in the System Administration module in the **Cataloging – Policy Definitions > Locations** tab).
- The system uses the Call Number hierarchy that matches the Classification Scheme for the Holdings/Item default location.

Example:

If you login to the Cataloging module and your Cataloging location is Library of Congress Cataloging, your Cataloging Group is defined as well as the location available with that Cataloging group. And you further do the following:

1. Set Holdings/Item default location to Science Reserve.
2. Set the Classification Scheme Default to Library of Congress
3. Set your Import/Replace file to Add Unconditional.
4. Create a holdings record from a bibliographic record.

The system looks for any Library of Congress call number types in the Call Number hierarchy associated with the ADDCOND Import/Replace profile defined in System Administration and uses the following logic.

- If no match is found, the system brings up a MFHD record with the location Science Reserve included as the subfield b.
- If a match is made, the call number information is added as subfield h and subfield i (along with the location Science Reserve in subfield b).

If a bibliographic record contains multiple instances of the call number information specified in the Call Number hierarchy (for example, more than one 090 \$a), it adds the call number information listed last to subfield h and subfield i of the MFHD.

MARC Field Ordering Rules

The MARC Field Ordering Rules feature provides the capability to view, create, edit, duplicate, and delete rules that define the order in which MARC fields are saved when using the Cataloging and GDC clients to create or update one record or a set of records. For each field or field group configuration that you create, the following sort options are provided:

- By indicator 1 ascending
- By indicator 1 descending
- By indicator 2 ascending
- By indicator 2 descending
- Leave order as is
- Name before name/title
- Numeric order
- RDA sorting
- Sort by \$5 first
- Sort by \$w
- Specific field first
- Specific indicator 1 first
- Specific indicator 2 first

An ordering rule that you create may contain one or more fields or field groups that can be sorted based on your priority preference.

Refer to [Miscellaneous](#) on [page 4-96](#) for related configuration information.

New MARC Field Ordering Rule:

Rule Name | Field Groups and Sort Rules

Field Group	Sort Rule
245	<multiple>
600-700	<multiple>
9XX	<multiple>

Priority

↑

↓

Add

Modify

Remove

Figure 4-36. MARC Field Ordering Rule Field and Field Groups Example 1

New MARC Field Ordering Rule:

Rule Name | Field Groups and Sort Rules

Field Group	Sort Rule
9XX	<multiple>
600-700	<multiple>
245	<multiple>

Priority

↑

↓

Add

Modify

Remove

Figure 4-37. MARC Field Ordering Rule Field and Field Groups Example 2

Creating a MARC Field Ordering Rule

Use the following to create a MARC Field Ordering Rule.



Procedure 4-6. Creating a MARC Field Ordering Rule

1. Click **Cataloging** on the vertical taskbar.

Result: The Voyager System Administration cataloging options display.

2. Click **MARC Field Ordering Rules**.

Result: The **Cataloging - MARC Field Ordering Rules** window opens.

3. Click **New**.

Result: The New MARC Field Ordering Rule area opens to the Rule Name tab.

New MARC Field Ordering Rule:

Rule Name | Field Groups and Sort Rules

Name:

Description:

☐ Apply 880 Paired Sorting

Save Cancel

Figure 4-38. New MARC Field Ordering Rule Area Opens to the Rule Name Tab

4. Enter a rule **Name** and **Description**. Both are required.

If you plan to use 880 paired sorting, select the **Apply 880 Paired Sorting** option. When this option is selected, the system first processes the field sorting identified with the **Available Sort Options** that you have selected and then applies the 880 paired sorting.

5. Select the **Field Groups and Sort Rules** tab and click **Add**.

Result: The **MARC Field Groups and Sorting** dialog box opens.

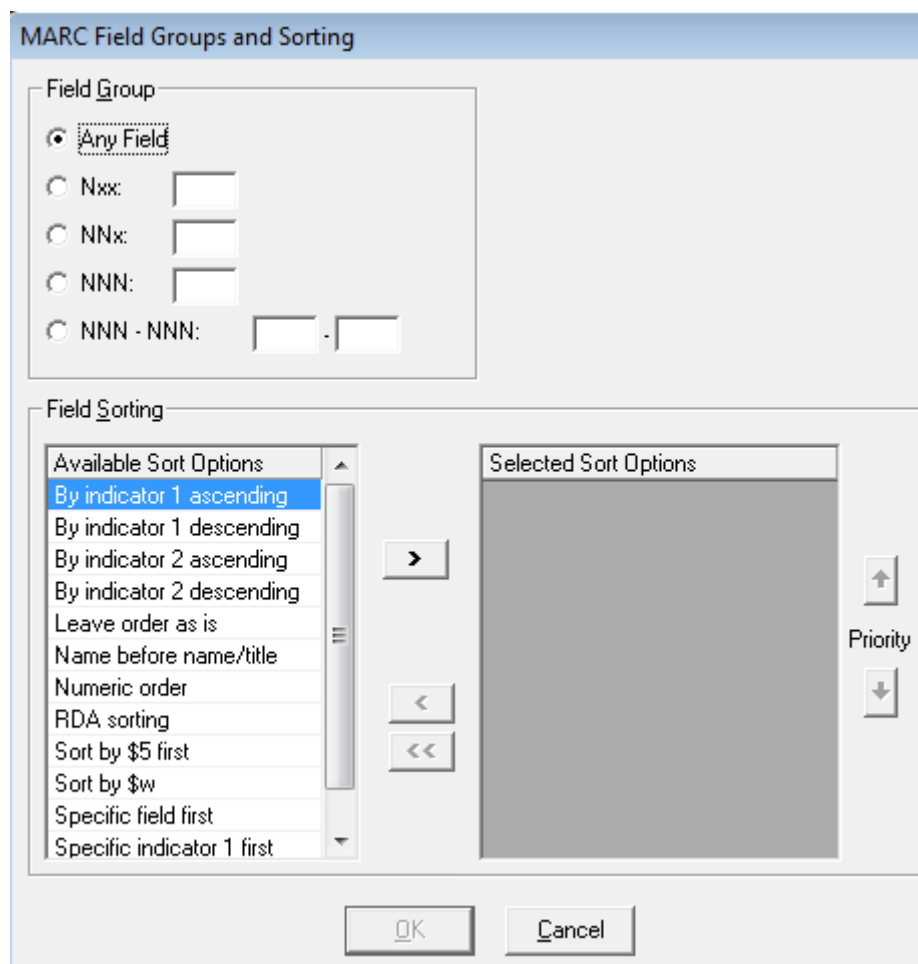


Figure 4-39. MARC Field Groups and Sorting Dialog Box

6. Identify the **Field Group** by selecting one of the following and entering the numbers as needed:
- Any field that begins with the number N (Nxx)
If you enter the number 9, this indicates any field from 900 through 999 (also noted as 9XX).
 - Any field that begins with the numbers NN (NNx)
If you enter the numbers 85, this indicates any field from 850 through 859 (also noted as 85X)
 - A specific field identified by NNN
 - A range of fields identified by NNN - NNN

Any Field is selected as the default option.

7. Select from the Available Sort Options to identify how you want the field sorting to be applied to the field(s) that you selected in the previous step.

You may select multiple sort options and identify the priority order in which you want them processed.

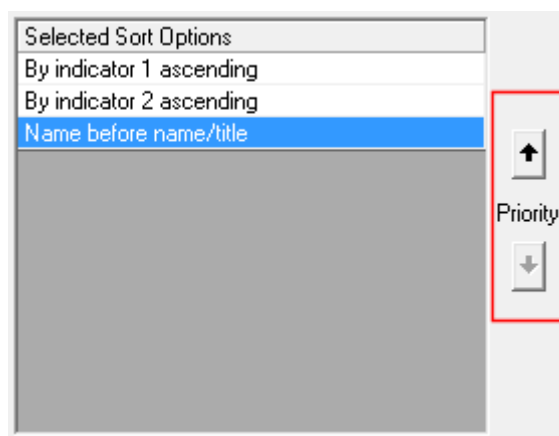


Figure 4-40. Multiple Sort Options Selected

Some sort options such as **Specific indicator 1 first** prompts you for additional information when you click the right arrow (greater than symbol) to move the sort option to the **Selected Sort Options** column.

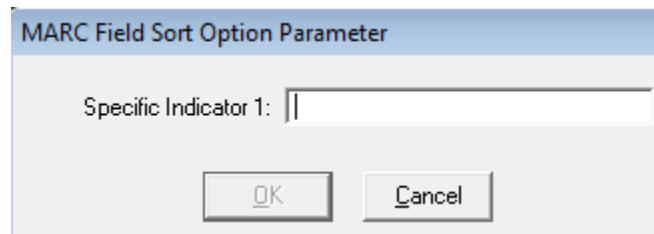


Figure 4-41. Sort Option Prompting for Additional Information

Some sort options can only be selected once and are removed from the **Available Sort Options** column when you have selected and moved them to the **Selected Sort Options** column. In addition, some sort options can be selected multiple times.

8. Click **OK** when you have completed making your selections.

Result: The field group you configured displays on the **Field Groups and Sort Rules** tab. If you selected multiple sort options, <multiple> displays in the **Sort Rule** column. If you select only one sort option, the name of that option displays in the **Sort Rule** column.

If you create multiple field group sort rules, you can arrange them in priority order.

New MARC Field Ordering Rule: _____

Rule Name | Field Groups and Sort Rules |

Field Group	Sort Rule
85X	<multiple>
9XX	Numeric order

Priority

↑

↓

Add

Modify

Remove

Figure 4-42. Field Groups and Sort Rules Tab

With this capability, you have the flexibility to do more involved sort configurations as in the following example.

Field Group	Sort Rule
100-299	Numeric order
360	Numeric order
400-599	Numeric order
330-339	Numeric order
6XX	Numeric order

Figure 4-43. Field Groups and Sort Rules Tab Example

NOTE:

When you have multiple field group sort rules that overlap, the broader rule is applied and the more narrow rule is ignored. For example, if you have a 9XX rule listed and then a 95X rule, the 95X rule is ignored since the 9XX rule is more broad.

9. Click **Save** when you are finished.

Miscellaneous

When you choose to implement using the MARC Field Ordering Rules, you need to configure the system to point to your vxws service location with the appropriate IP address in the Reorder Service URL parameter. The default for this parameter is `http://localhost:9999/vxws/marc-field-order`. Port 9999 should be replaced with the vxws port for your instance (7014, for example, for a database using the 7000 port series).

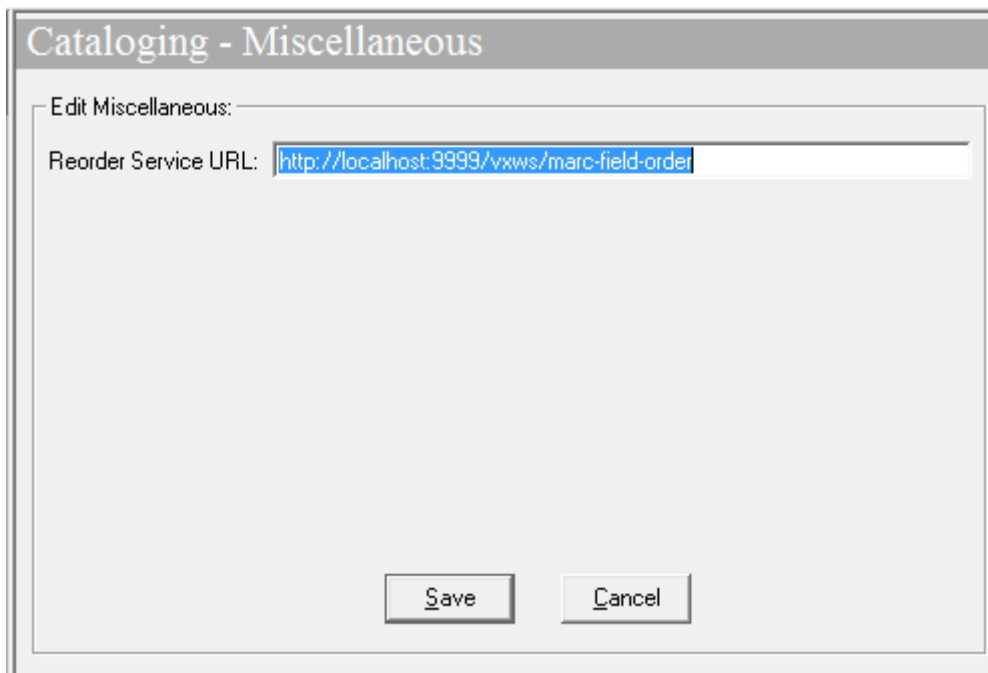


Figure 4-44. Reorder Service URL Default Setting

To customize this for your installation, replace **localhost:9999** with your IP address like `http://10.100.99.99:1234/vxws/marc-field-order`.

Setting the Reorder Service URL

Use the following to set the Reorder Service URL.



Procedure 4-7. Setting the Reorder Service URL

1. Click **Cataloging** on the vertical taskbar.

Result: The Voyager System Administration cataloging options display.

2. Click **Miscellaneous**.

Result: The **Cataloging - Miscellaneous** window opens.

3. Replace the `localhost:9999` portion of the URL in the Reorder Service URL parameter with the IP address for your installation.

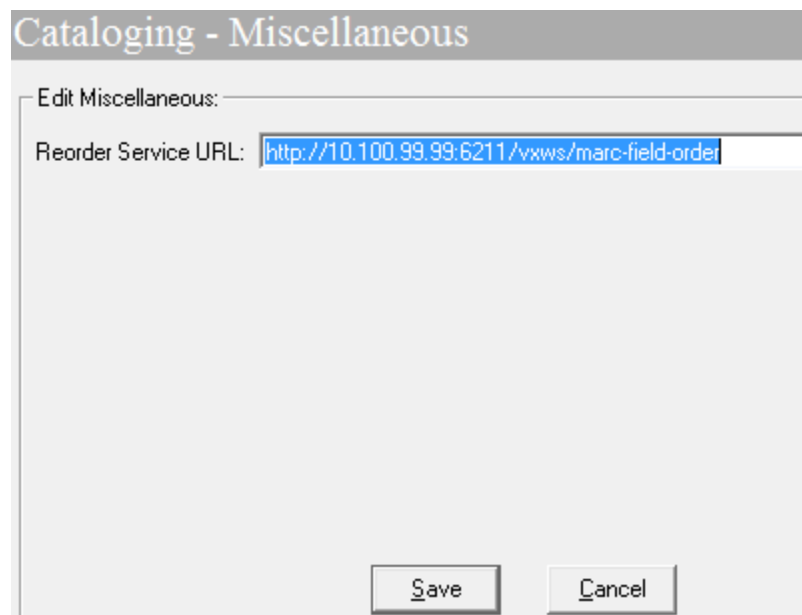


Figure 4-45. Reorder Service URL Customized

4. Click **Save**.

If you have the Cataloging and/or GDC clients open before making this parameter change, you will need to close and reopen then for the MARC Field Ordering Rules to be in effect.

Policy Definitions

Each library has one or more departments responsible for cataloging and classifying items for various locations within the library and for creating authority records for database quality assurance. Any department with this kind of responsibility should be defined in a cataloging policy group that specifies the locations for which it performs such tasks.

Cataloging - Policy Definitions provides the options to define the locations and characteristics of a cataloging policy group.

Creating Cataloging - Policy Definitions

Use the following to create **Cataloging - Policy Definitions**.



Procedure 4-8. Creating Cataloging - Policy Definitions

1. Click **Cataloging** on the vertical listbar.

Result: The Voyager System Administration cataloging options display. See [Figure 4-1](#).

2. Click **Policy Definitions**.

Result: The **Cataloging - Policy Definitions** dialog box opens. See [Figure 4-46](#).

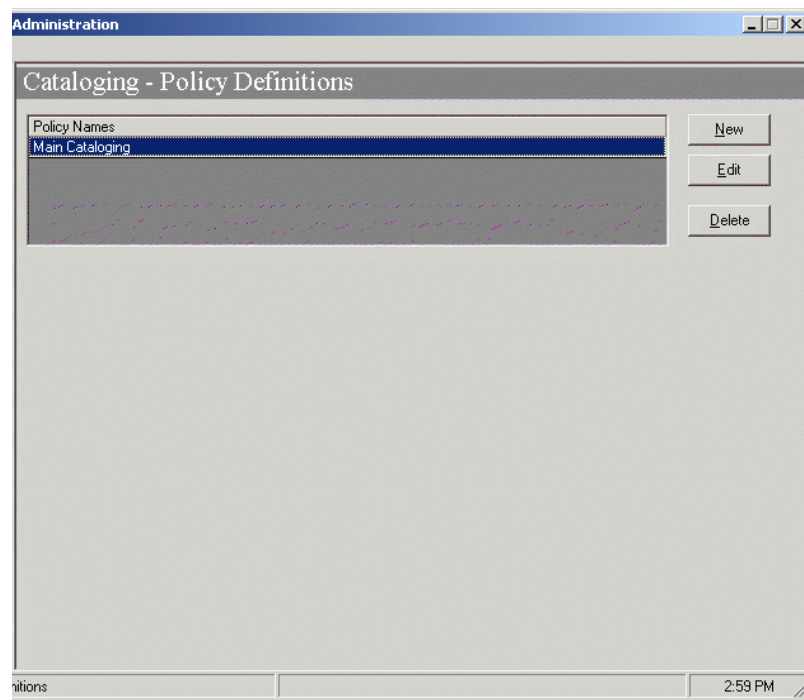


Figure 4-46. Cataloging - Policy Definitions

3. Click **New**.

Result: The **New Policy Definition** options display. See [Figure 4-47](#).

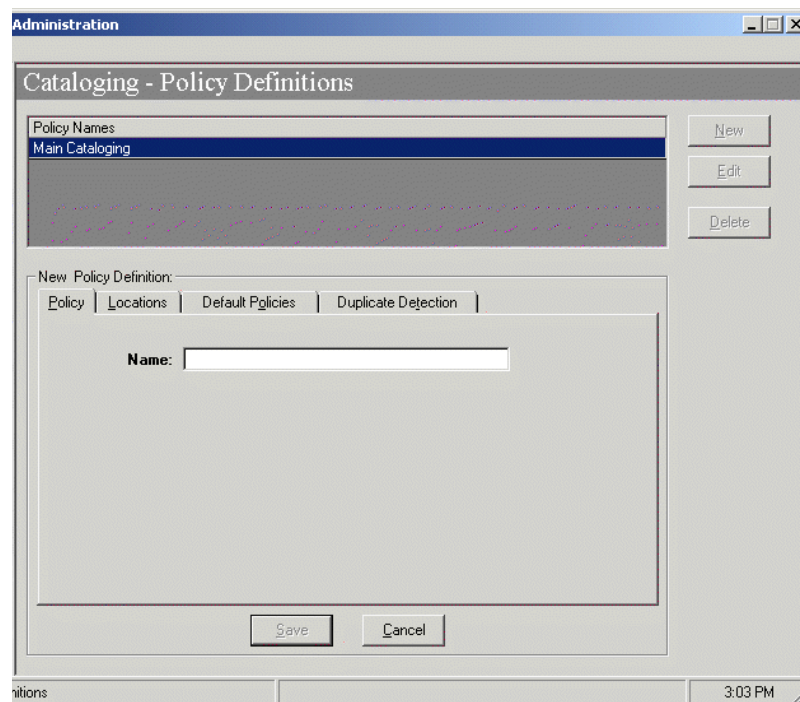


Figure 4-47. New Policy Definition options

4. Enter the **Name** on the **Policy** tab for the new policy definition. Name can be up to 40 characters in length (uppercase and lowercase alphanumeric characters, punctuation, and spaces).

Result: This name identifies the policy definition that you are creating.

5. Click the **Locations** tab.

Result: This displays the location options for the new policy definition. See [Figure 4-48](#).

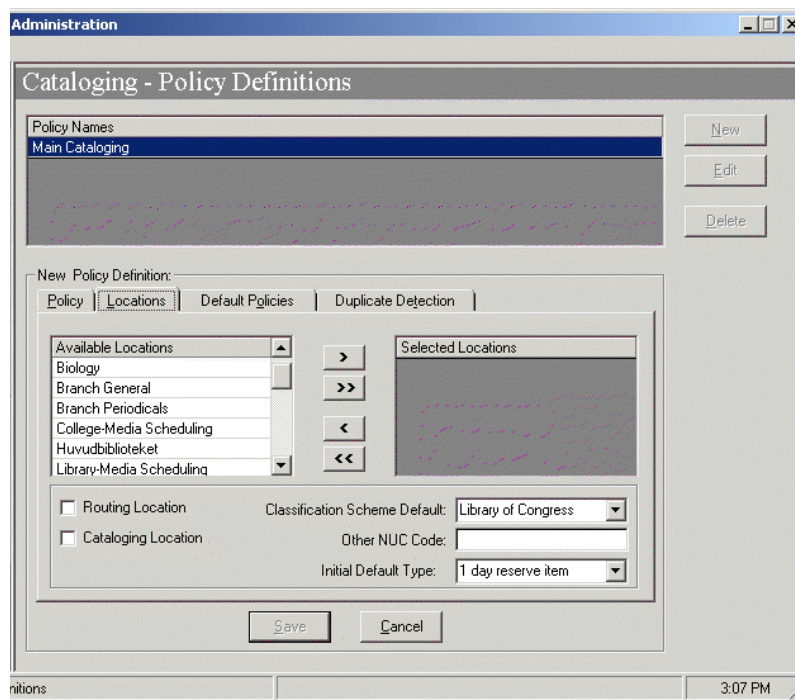


Figure 4-48. New Cataloging - Policy Definitions Locations tab options

6. Enter the options on the **Locations** tab that match your requirements. See [Table 4-30](#) for a description of available options on the **Locations** tab.

Result: This completes the locations portion of the setup for a new cataloging policy group definition.

Table 4-30. New Cataloging - Policy Definitions Locations tab options

Options	Description
Available/Selected Locations	Select a location from the Available Locations list using the > button to move it to the Selected Locations list. Use Shift + Click to highlight multiple locations in the Available Locations list and the >> button to move multiple highlighted locations to the Selected Locations list. Only locations that have not already been assigned to a cataloging policy group display in the Available Locations list. Use the < and << buttons to remove locations from the Selected Locations list. For each location selected, specify one or more of the following options:

Table 4-30. New Cataloging - Policy Definitions Locations tab options

Options	Description
Routing Location	Select this option to have the system prompt the circulation operator to print a routing slip whenever an item from the selected location is discharged. Use this option for any location where items should be treated differently from other items for resolving purposes. (r) displays next to the location name in the Selected Locations list when the location is defined as a Routing Location.
Cataloging Location	Select Cataloging Location for a location where cataloging work is actually performed. At least one location in the cataloging policy group must be defined as a Cataloging Location. (c) displays next to the location name in the Selected Locations list when the location is defined as a Cataloging Location.
Classification Scheme Default	Select a Classification Scheme Default to have the system automatically set values in the MARC holdings record for that scheme when the location in the Selected Locations list is chosen in the Cataloging client module.
Other NUC Code	Enter an Other NUC Code if the selected location has an NUC code other than the one defined for all the selected locations. The system automatically uses the Other NUC Code for any item at the selected location when exporting records.
Initial Default Type	Select the Initial Default Type that the system is to automatically enter as the item type value in the MARC item record. The Initial Default Type is only used when the selected location is chosen after logging into the Cataloging module. The Initial Default Type value can also be changed in Session Preferences within the Cataloging module.

7. Click the **Default Policies** tab.

Result: This displays the **Default Policies** tab options for the new policy definition. See [Figure 4-49](#).

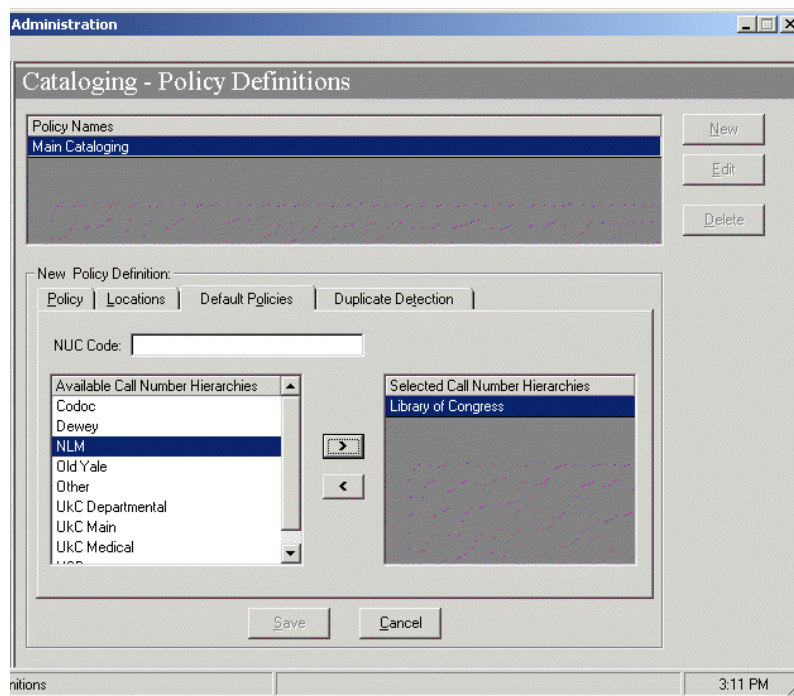


Figure 4-49. Default Policies tab

8. Enter the options on the **Default Policies** tab that match your requirements. See [Table 4-31](#) for a description of available options on the **Default Policies** tab.

Result: This completes the **Default Policies** tab portion of the setup for a new cataloging policy group definition.

Table 4-31. Default Policies tab options

Option	Description
NUC Code	Enter the NUC Code that applies to all of the Selected Locations when exporting records.
Available/Selected Call Number Hierarchies	Select a call number hierarchy from the Available Call Number Hierarchies list using the > button to move it to the Selected Call Number Hierarchies list. Use the < button to remove a location from the Selected Call Number Hierarchies list.

- Click the **Duplicate Detection** tab.

Result: This displays the **Duplicate Detection** tab options for the new policy definition. See [Figure 4-50](#).

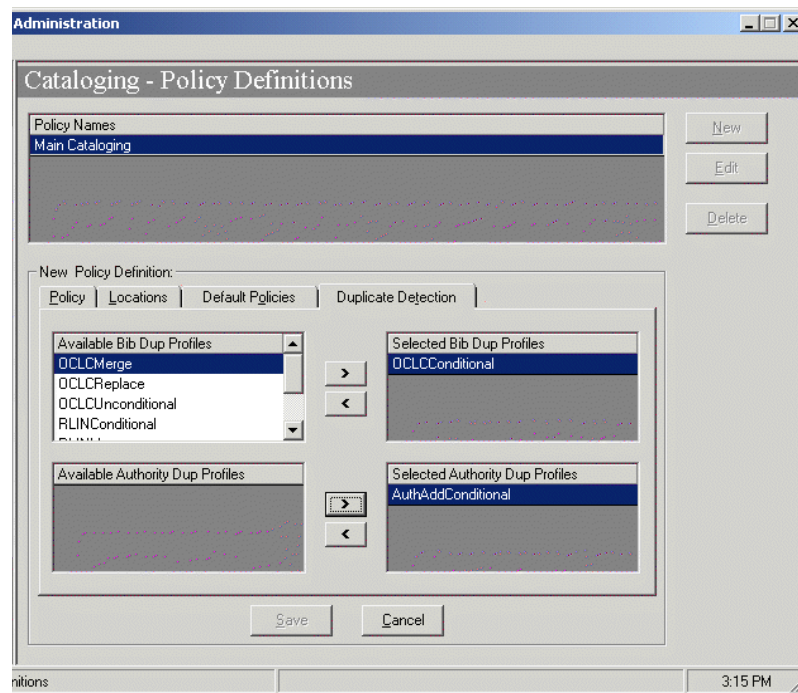


Figure 4-50. Duplicate Detection tab

- Enter the options on the **Duplicate Detection** tab that match your requirements. See [Table 4-32](#) for a description of available options on the **Duplicate Detection** tab.

Result: This completes the **Duplicate Detection** tab portion of the setup for a new cataloging policy group definition.

Table 4-32. Duplicate Detection tab options

Option	Description
Available/Selected Bib Dup Profiles	Select a bibliographic duplicate profile from the Available Bib Dup Profiles list using the > button to move it to the Selected Bib Dup Profiles list. Use the < button to remove a bibliographic duplicate profile from the Selected Bib Dup Profiles list.
Available/Selected Authority Dup Profiles	Select an authority duplicate profile from the Available Authority Dup Profiles list using the > button to move it to the Selected Authority Dup Profiles list. Use the < button to remove an authority duplicate profile from the Selected Authority Dup Profiles list.

11. Click **Save** or click **Cancel**.

Result: This saves or cancels the **New Policy Definition** for **Cataloging - Policy Definitions**.

RDA Toolkit

The RDA Toolkit options provide the capability to configure your system to work with the RDA Toolkit online subscription service. The Voyager System Administration options for RDA Toolkit enable you to configure:

- An institution user name and password
- The base URL for accessing the RDA Toolkit

Configuring RDA Toolkit

Use the following to configure RDA Toolkit.



Procedure 4-9. Configuring RDA Toolkit

1. Click **Cataloging** on the vertical listbar.

Result: The Voyager System Administration cataloging options display.

2. Click **RDA Toolkit**.

Result: The **Edit RDA Toolkit Options** display.

3. Select **Enable RDA Toolkit Links**.

Result: The remaining fields on the display become active.

4. Enter the institution-level user name and password.

If your institution is using IP authentication or user-level user names and password, leave these fields blank and enter the user-level (Cataloging operator) user name and password information in the Cataloging module on the RDA Toolkit tab in Session Defaults and Preferences.

5. Enter the base URL.

This is a required field if you have selected **Enable RDA Toolkit Links**.

The fixed portion of the base URL is:

`http://access.rdatoolkit.org/?encode=marc&rec=`

The variable portion of the URL is supplied by Voyager dependent on the position of the cursor when editing a MARC record. Refer to the description of the RDA Toolkit option in the Edit menu in the *Cataloging User's Guide*.

6. Click **Save**.
-

Introduction

In Voyager all Circulation activity occurs within the context of a Circulation Cluster. Sites will have at least one Circulation Cluster.

A Circulation Cluster is a group of Patron Groups and Circulation Policy Groups. By extension, the cluster also contains the patrons belonging to those Patron Groups, the items with locations belonging to the Circulation Policy Group, and the Circulation Policy Matrices associated with the Circulation Policy Group (see [Figure 5-1](#)).

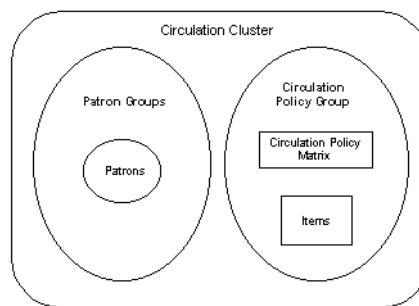


Figure 5-1. Circulation Cluster

A Circulation Policy Group is a set of locations and policies that are applied to patron groups. The locations include both the circulation desks and the shelving locations.

The policies attached to a Circulation Policy Group are policies that are in effect for a patron group regardless of the item type involved in a circulation transaction. Many of these policies involve the block points for patrons, such as the maximum number of items a patron can borrow.

An item belongs to a Circulation Policy Group if it is shelved in one of the locations in the Circulation Policy Group.

The Circulation Policy Matrix associates a specific Patron Group and a specific Item Type with a set of policies. Each Circulation Policy Group is associated with a set of Circulation Policy Matrices. The policies in the Circulation Policy Matrices are rules for circulation transactions between specific patron groups and specific item types.

Purpose of this Chapter

This chapter explains how to configure the Circulation section of the System Administration module allowing sites to define their circulation practices and policies. This section discusses the following:

- Overview of Circulation.
- Edit a Circulation Cluster in the **Cluster Maintenance** workspace.
- Create/Edit Circulation Calendars in the **Calendars** workspace.
- Set up/Edit Miscellaneous Circulation Features in the **Miscellaneous** workspace
- Create/Edit Patron Groups in the **Patron Groups** workspace.
- Create/Edit Circulation Policy Definitions in the **Policy Definitions** workspace.
- Create/Edit Request Groups in the **Request Groups** workspace.
- Create/Edit Patron Group Mappings (if using Universal Borrowing) in the **Patron Group Mappings** workspace.
- Create/Edit UB Policy Definitions (if using Universal Borrowing) in the **UB Policy Definitions** workspace.



IMPORTANT:

This section discusses how to configure circulation for a database with a single Circulation Cluster. See the Voyager Circulation Clusters User's

Guide for additional information on sites using multiple clusters within one database.

Overview of Circulation

A patron's ability to charge and/or request an item depends on the patron group to which they belong and the item type of the material they want to charge or request.

Rules are set up in a Circulation Policy Group and an associated Circulation Policy Matrix to govern circulation transactions. A Circulation Policy Group is a set of locations and circulation policies. The locations include both the circulation desks (happening locations), the shelving locations, and the pickup locations.

The circulation policies defined in a Circulation Policy Group are in effect for all patrons who are members of the patron groups within that Circulation Policy Group regardless of the item involved in the circulation transaction. Many of these policies involve the block points for patrons, such as the maximum number of items a patron can borrow.

Additionally, each Circulation Policy Group contains a Circulation Policy Matrix. A Circulation Policy Matrix connects a patron group-item type combination to a set of policies. The policies in the Circulation Policy Matrix provide the rules for circulation transactions between specific patron groups and specific item types; for example, the length of the loan period for a CD-ROM charged to a staff member.

The item has two important characteristics that relate to circulation: its location and its item type. The location, where the item is shelved, connects the item to its Circulation Policy Group through the locations that are defined as part of that group. That is, an item belongs to a Circulation Policy Group if it is shelved in one of the locations included in the Circulation Policy Group. The item type, for example, a book or CD-ROM, is one part of a Circulation Policy Matrix which is associated with a Circulation Policy Group. The Circulation Policy Matrix contains specific patron group-item type combinations and provides the rules which govern transactions.

The key to circulation in Voyager is to bear in mind that the item essentially governs the transaction.

The circulation process is shown in [Figure 5-2](#) on [page 5-4](#).

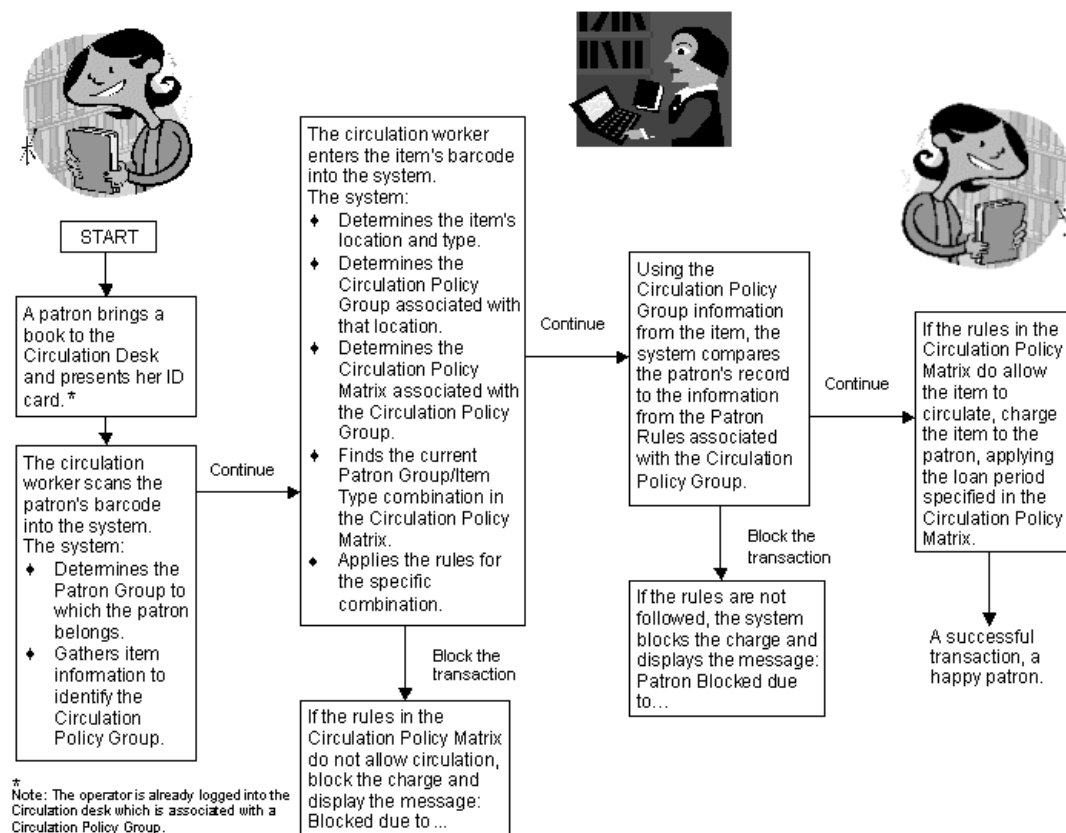


Figure 5-2. The circulation process

Additionally, each Circulation Desk also belongs to a Circulation Policy Group. It is possible for the item used in a circulation transaction to belong to a different Circulation Policy Group than the Circulation Desk where the transaction is taking place. In this case the transaction is an 'exception' transaction and requires an operator override. The policies for this transaction still come from the Circulation Policy Group to which the item belongs.

Cluster Maintenance

Your Voyager database contains at least one Circulation Cluster. The **Circulation - Cluster Maintenance** workspace of the System Administration module allows sites to edit and view Circulation Cluster information.

Security

To define and use Circulation Clusters, operators need to have certain privileges to work in the System Administration module and/or Circulation module.

All operator privileges are granted in the System Administration module.

The ability to create, edit, delete, or simply view Circulation Clusters is set up in the System Administration> Security> Master Profiles section. Once given this ability, only those clusters with locations listed in the Master Profile section will be viewable/editable.

The ability to edit or view Circulation Clusters is set up in the System Administration> Security> Master Profiles section, **Profile Values** tab. This tab contains the **Cluster Edit** and the **Cluster View-Only** check boxes.

When the **Cluster Edit** check box is checked, operators will be able to edit Circulation Clusters in the database. This allows the **Edit** button on the **Circulation - Cluster Maintenance** workspace to be active.

When the **Cluster View-Only** check box is checked, operators will only be able to view Circulation Clusters in the database. This allows the **View** button on the **Circulation - Cluster Maintenance** workspace to be active, with the fields visible, but not editable.

See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#) for more information.

Circulation - Cluster Maintenance Workspace

[Table 5-1](#) provides names, descriptions, locations, if required, and the type and range requirements for the fields in the **Circulation - Cluster Maintenance** workspace.

Table 5-1. Fields in the Circulation - Cluster Maintenance Workspace

Name	Description	Required	Type and Range
Cluster Code	The code given to the Circulation Cluster.	Yes	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 10 characters. The default code is CLUSTER1, created at load or upgrade.
Cluster Name	The name given to the Circulation Cluster.	Yes	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 100 characters. The default name is taken from the library name already provided in the System Administration module, Default Library Address field. If no name is found, it is named Default Cluster.
OPAC Circ Desk	The circulation desk that is used for circulation transactions occurring in WebVoyage.	Yes See Circulation Locations (Circulation Happening Locations) on page 5-62 .	The default OPAC Circulation desk will be the former global OPAC circ desk (at upgrade). The drop-down menu will be populated by the Circulation desks in the Circulation Policy Group.

Table 5-1. Fields in the Circulation - Cluster Maintenance Workspace

Name	Description	Required	Type and Range
Default Pickup Location	The Pickup location that begins the list of available Pickup locations on request forms. After this location, other pickup locations are listed alphabetically.	Yes, if the cluster has defined pickup locations in its Policy Group(s). See Circulation Locations (Circulation Happening Locations) on page 5-62.	There is no default Pickup Location. The drop-down menu will be populated by the Pickup locations defined in the Circulation Policy Groups.

Editing Circulation Cluster Information

Users can edit Circulation Cluster information. Any changes affect future circulation transactions only.



IMPORTANT:

Deleting a Circulation Cluster is not allowed in a single cluster environment.

NOTE:

Changing the OPAC Circ desk changes the circulation desk that WebVoyage uses. Therefore, a different Circulation Policy Groups would be associated with requests.



Procedure 5-1. Editing Circulation Cluster Information

Use the following to edit Circulation Cluster information.

1. Access the **Circulation - Cluster Maintenance** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Cluster Maintenance** button in the Circulation listbar.

Result: The **Circulation - Cluster Maintenance** workspace opens.

2. Click the **Edit** button.

Result: The bottom half of the **Circulation - Cluster Maintenance** workspace opens with the **Cluster Code**, **Cluster Name**, **OPAC Circ desk**, and the **Default Pickup Location** fields available.

3. Enter the cluster field information to match your requirements in the bottom half of the **Circulation - Cluster Maintenance** workspace section of the dialog box.
4. Click the **Save** button to save the changes. Click the **Cancel** button if you do not want to keep the changes.

Result: If saved, the edits are saved and the system returns to the **Circulation - Cluster Maintenance** workspace. If canceled the system returns to the **Circulation - Cluster Maintenance** workspace.

Circulation Calendars

A Circulation Calendar defines the following.

- A circulation desk's regular open and closed hours.
- A circulation desk's exceptions to the regular schedule.
- Fixed due dates and times.
- End of term date and lead days.

Security

Operators linked to a Master security profile, where the **Circulation Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked are able to create Circulation Calendars. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Rules for Circulation Calendars



IMPORTANT:

A circulation desk must have an active Calendar in order to perform discharge transactions. Charge transactions can be done without an active Calendar, but in such an event, all due dates must be manually entered by the operator.

You must define at least one Circulation Calendar. There is no limit to the number of calendars you can define.

If all the circulation desks in a cluster follow the same hours, they all can use one Circulation Calendar. If each circulation desk has its own hours of operation, it needs to have its own Circulation Calendar.

When entering dates or times, the Microsoft® Windows Regional Settings control the display in the Voyager module. Therefore, if you are using a 12-hour clock in Windows, Voyager uses a 12-hour clock.

Circulation - Calendars Workspace

Creating and editing Circulation Calendars is done in the **Circulation - Calendars** workspace.

There are four tabs in the **Calendar** section of this workspace: **Selected**, **Hours**, **Exception Dates**, and **Term Loans** (see [Figure 5-3](#)).

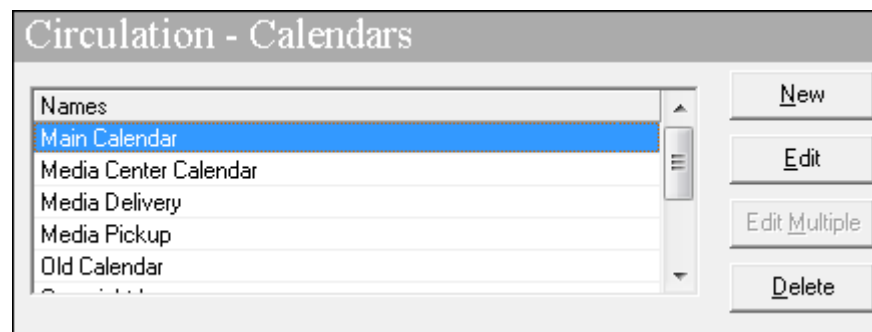


Figure 5-3. Circulation - Calendars Workspace

Selected Tab

The Selected tab displays the calendar name (or multiple names as in [Editing Multiple Circulation Calendars](#) on [page 5-27](#)).

Field Descriptions

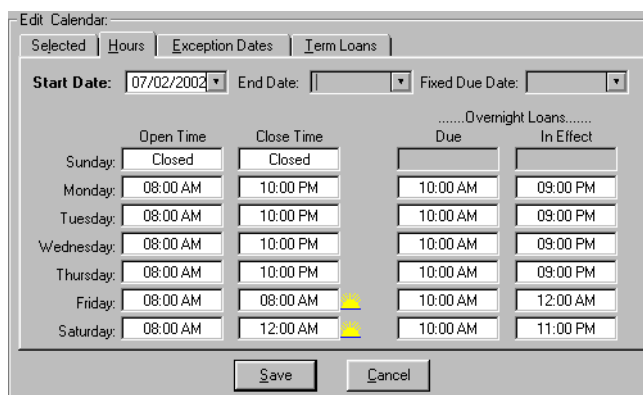
[Table 5-2](#) provides descriptions of the fields on the **Selected** tab of the **Circulation - Calendars** workspace, used to create and edit Circulation Calendars. The table provides names, descriptions, if required, and type and range requirements for the fields.

Table 5-2. Fields on the Selected Tab of the Circulation - Calendars Workspace

Name	Description	Required	Type and Range
Calendar Name	The name given to the calendar. The calendars display alphabetically.  TIP: If your Calendar corresponds to a specific period of time, include that in your Calendar Name.	Yes	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 25 characters.

Hours Tab

[Figure 5-4](#) displays the **Hours** tab.



..... Overnight Loans.....

	Open Time	Close Time	Due	In Effect
Sunday:	Closed	Closed		
Monday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Tuesday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Wednesday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Thursday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Friday:	08:00 AM	08:00 AM	10:00 AM	12:00 AM
Saturday:	08:00 AM	12:00 AM	10:00 AM	11:00 PM

Save Cancel

Figure 5-4. Hours Tab

[Table 5-3](#) provides descriptions of the fields on the **Hours** tab of the **Circulation - Calendars** workspace, used to create and edit Circulation Calendars. .

Table 5-3. Fields on the Hours Tab of the Circulation - Calendars Workspace

Name	Description	Required	Type and Range
Start Date	The date on which the calendar becomes active.	Yes	Date It must be the current date or a future date.
End Date	The last date on which the calendar is active. Use when the hours of operation or exceptions change and another Calendar needs to become active. If so, the End Date should be the date immediately preceding the Start Date of the next Calendar.	No For indefinite end dates, leave this blank.	Date It must be the same or later than the start date.
Fixed Due Date	The date to which loan periods will be adjusted, if the calculated loan period falls after the Fixed Due Date. If you enter a Fixed Due Date, the system calculates the due date according to the regular loan period per the appropriate Circulation Policy Group matrix but then determines whether the due date falls before or after the Fixed Due Date. If after, the system automatically adjusts the due date to be the Fixed Due Date. NOTE: This applies to all loans.	No When blank, the loan period as determined in the appropriate Circulation Policy Matrix will always apply when the system calculates the due date. See Matrix Tab and Circulation Policy Settings on page 5-91 .	Date It must be the same as or fall after the Calendar's Start Date.
Open Time (per day)	The time that the circulation desk opens. NOTE: If your library is open 24 hours a day, the system treats 5:00 AM as the beginning of a new day. See Libraries Open 24 Hours on page 5-18 .	No	Time

Table 5-3. Fields on the Hours Tab of the Circulation - Calendars Workspace

Name	Description	Required	Type and Range
Close Time (per day)	The time that the circulation desk closes.	Only if an Open time is provided.	Time
Overnight Loans Due	For items charged on the previous open day, after the in effect time has passed, this specifies the time that the item is due on this day.	Yes, if Apply Fixed Due Time for Overnight Loans is checked in Circulation Policy Definitions.	Time
Overnight Loans In Effect	When charging an item, this time determines when an overnight loan will have a fixed due applied. If the time provided is reached or past, the Fixed Due time will be applied.	Yes, if Apply Fixed Due Time for Overnight Loans is checked in Circulation Policy Definitions	Time

Fixed Due Times

Fixed due times and their effective times, for hourly and minute overnight loans, can be determined if wanted. This gives libraries the ability to specify a fixed due time for the next open day, and specify a time at which the fixed due time is effective when charging for hourly and minutely loans.

NOTE:

Fixed due times do not apply to loan periods of days.

For example, if an **Overnight Loans Due** time is set for 9:00 am Monday through Friday, and noon Saturday and Sunday, this means that items charged Sunday through Thursday night are due the next day at 9:00 am, but those charged Friday and Saturday night are due the next day at noon assuming they are charged within the nights **In Effect** time.

- A day's effective time determines when, on the day in question, overnight loans will have a fixed due time applied, that is, due at a fixed time the next day.
- A fixed due time determines when overnight loans, charged on the previous open day, will come due on that day.

To enable fixed due times, the **Apply Fixed Due Time for Overnight Loans** check box must be checked. See [Policies Tab](#) on [page 5-66](#) for information about this check box.

Calculating Loan Periods for Hourly and Minutely Loans

1. If the **Apply Fixed Due Time to Overnight Loan** check box, found on the **Policies** tab of the associated Circulation Policy Group, is not checked, *and* if the **Count Closed Days/Hours/Minutes for Loans** check box also on that tab is not checked...

then whatever loan time remains (after the closing time) rolls into the next open day. For example, a two hour loan charged one hour before the close time is due 1 hour after the library opens the next open day.

2. If the **Apply Fixed Due Time to Overnight Loan** check box, found on the **Policies** tab of the associated Circulation Policy Group, **is not** checked, *and* if the **Count Closed Days/Hours/Minutes for Loans** check box also on that tab **is** checked...

then the loan will not roll into the next day and the loan period is truncated to the closing time of the library. For example, a two hour loan charged one hour before the close time is due at close time and the patron is only allowed that item for an hour.

3. If the **Apply Fixed Due Time to Overnight Loan** check box, found on the **Policies** tab of the associated Circulation Policy Group, **is** checked, the system checks the **Overnight Loans In Effect** time set on the **Hours** tab of the Calendar.

- a. If the charge is made prior to the **Overnight Loans In Effect** time, calculate the due time based on the matrix loan interval.

1. If the calculated due time is before the library closes, that is the due time.
2. If the calculated due time is after the library closes, truncate the due time to be the close time.



TIP:

The In Effect time must be as long, or longer, than the longest hourly loan. If not the loan period will be truncated to the closing time as the loan will never be charged within the In Effect time period.

- b. If the charge is made after **Overnight Loans In Effect** time, then use the overnight loan due time found for the next open day, taking into account exception dates.

Exceptions When Calculating Loan Periods for Hourly and Minutely Loans

Exceptions occur if data is missing in the **Overnight Loans In Effect** time or the **Overnight Loans Due** time.

1. If the **Apply Fixed Due Time to Overnight Loan** check box is checked but there is no **Overnight Loans In Effect** time given, the loan will be calculated based on the matrix.
 - a. If the calculated due time is before the library closes time, that is the due time.
 - b. If the calculated due time is after the library closes time, truncate the due time to the closing time.



TIP:

*If a library wants to force a due time for hourly and minutely loans to the library's closing time, then they should remove that day's **Overnight Loans In Effect** time to force the system to truncate to closing time.*

2. If the **Apply Fixed Due Time to Overnight Loan** check box is checked but there is no **Overnight Loans Due** time for the next open day, the due time is truncated to today's closing time.

Fixed Due Times for Short Loans

When the **Apply Fixed Due Time to Overnight Loan** check box is checked,

1. If the start time of the short loan falls on or after the day's **In Effect** time, then the displayed ending time is the **Fixed Due Time** specified.
2. If there is no **Overnight Loans In Effect** time given, the loan will be calculated based on the matrix.
 - a. If the calculated due time is before the library closes time, that is the due time.
 - b. If the calculated due time is after the library closes time, truncate the due time to the closing time.
3. If there is no **Overnight Loans Due** time for the next open day, the due time is truncated to today's closing time.

Exception Dates Tab

[Figure 5-5](#) displays the **Exception Dates** tab and the **Exception Dates Settings** dialog box.

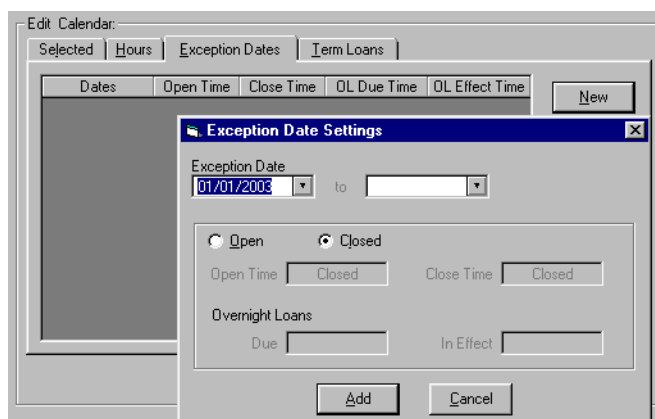


Figure 5-5. Exception Dates Tab and the Exception Dates Settings dialog box

[Table 5-4](#) provides descriptions of the fields on the **Exception Dates** tab of the **Circulation - Calendars** workspace, used to create and edit Circulation Calendars. The table provides names, descriptions, if required, and type and range requirements for the fields.

Table 5-4. Fields on the Exception Dates Tab of the Circulation - Calendars Workspace

Name	Description	Required	Type and Range
Exception Date	Dates that deviate from the usual schedule defined in the Open/Closed values. This includes dates that are closed, when they would normally be open. Also, dates that are open when they would normally be closed. It also includes dates where the open/close times differ than the usual open/close times for that day of the week.	No	If the calendar has an End Date, any exception date must be the same as or fall before the End Date. If the calendar has no End Date, any exception date must be the same as or fall after the Start Date.
Open Radio button or Closed Radio button	Click the Open button for any day the circulation desk is open for any period of time. Click the Closed button for any day the circulation desk is closed all day.	Yes, either you select Open or Closed for the given date.	Radio button

Table 5-4. Fields on the Exception Dates Tab of the Circulation - Calendars Workspace

Name	Description	Required	Type and Range
Open Time	The time that the circulation desk opens, for the exception date.	Yes, if the circulation desk is open.	Time
Close Time	The time that the circulation desk closes, for the exception date.	Yes, if the circulation desk is open.	Time
Overnight Loans Due	For items charged on the previous open day, after the in effect time has passed, this specifies the time that the item is due on this day.	Yes, if Apply Fixed Due Time for Overnight Loans is checked in Circulation Policy Definitions.	Time
Overnight Loans In Effect	When charging an item, this time determines when an overnight loan will have a fixed due applied If the time provided is reached or past, the Fixed Due time will be applied.	Yes, if Apply Fixed Due Time for Overnight Loans is checked in Circulation Policy Definitions	Time

Term Loans Tab

[Figure 5-6](#) displays the **Term Loans** tab, and the **Circulation Calendar Term Settings** dialog box.

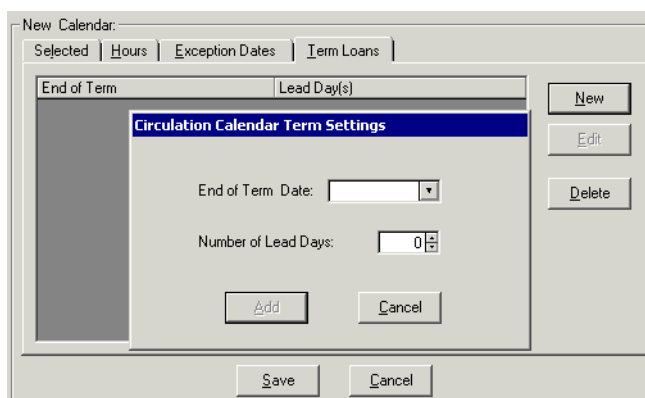


Figure 5-6. Term Loans Tab and the Circulation Calendar Term Settings dialog box

[Table 5-5](#) provides descriptions of the fields on the **Term Loans** tab and the **Circulation Calendar Term Settings** dialog box of the **Circulation - Calendars** workspace, used to create and edit Circulation Calendars. The table provides names, descriptions, if required, and type and range requirements for the fields.

Table 5-5. Fields on the Term Loans Tab and the Circulation Calendar Term Settings dialog box of the Circulation - Calendars Workspace

Name	Description	Required	Type and Range
End of Term Date	Date that is the end of the following term. Items charged by term can, within a specified lead time, be renewed to the next available term end date. More than one end of term date may be defined per Calendar.	Yes, if the loan period in any of the Circulation Matrix settings is term.	Date It must be the same as or fall before the Calendar's End Date. If the Calendar has no End Date, an End of Term Date must be the same as or fall after the Start Date.
Lead Days	The number of days prior to the end of a term within which a term loan can be renewed to the end of the following term.	No	0-999 0 is the default.

End of Term Due Dates

To assign end of term due dates you must have at least one end of term date in the calendar and a number of lead days defined.

NOTE:

This applies only to patron group-item type combinations where the loan type is term.

If you want an item that is charged or renewed to be due at the end of the next term the following conditions must be met:

- the end of term date for the current term must be defined
- lead days for the current term must be defined
- the item must be charged or renewed within the lead days defined before the end of the current term
- the next term's end of term date must be defined.

In this example we use the Circulation Calendar that is set up in [Figure 5-7](#).

Selected | Hours | Exception Dates | Term Loans |

End of Term	Lead Day(s)
5/16/2002	14
12/20/2002	14

New

Edit

Delete

Figure 5-7. Term Loans Tab for a Circulation Calendar

If a student charges a term loan period item out at the beginning of the fall semester, it would be due at the end of that term, 12/20/2002. If that student renewed the item within 14 days of the 12/20/2002 end of term date (12/7/2002-12/20/2002), the new due date would be the end of the next term, 5/16/2003.

If a student charged a term loan period item out within the 14-day lead time for the end of the fall term, the due date would be 5/16/2003.

Libraries Open 24 Hours

The range for a given day may not span a period of a full 24 hours. If your library is open 24 hours a day, enter your closing time as 4:59 AM and your opening time as 5:00 AM for each day. The system treats 5:00 AM as the beginning of a new

day. The purpose for this is that, if your library is open from 10:00 AM Monday to 3:00 AM Tuesday, for example, the entire period is considered to have taken place on Monday.

Creating a Circulation Calendar

This section provides step-by-step instructions on how to create a Circulation Calendar within the System Administration module.



Procedure 5-2. Creating a Calendar

Use the following to create a Circulation Calendar.

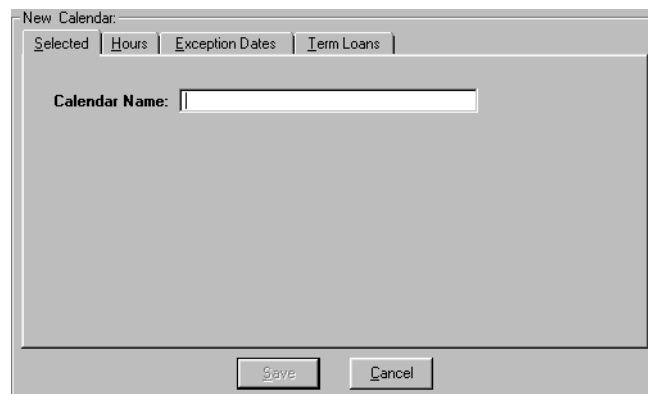
1. Access the **Circulation - Calendars** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Calendars** button in the Circulation listbar.

Result: The **Circulation - Calendars** workspace opens.

2. Click the **New** button.

Result: The bottom half of the **Circulation - Calendars** workspace opens to the **Calendar** section (see [Figure 5-8](#)).

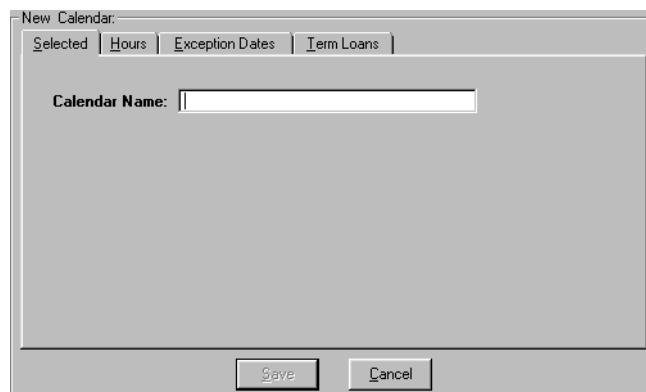
There are four tabs in the **Calendar** section: **Selected**, **Hours**, **Exception Dates**, and **Term Loans**.



The image shows a 'New Calendar' dialog box with four tabs: 'Selected', 'Hours', 'Exception Dates', and 'Term Loans'. The 'Selected' tab is active. Inside the dialog, there is a label 'Calendar Name:' followed by a text input field. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

Figure 5-8. Selected Tab

3. On the **Selected** tab, Enter the calendar name in the **Calendar Name** field (see [Figure 5-9](#)).



This image is identical to Figure 5-8, showing the 'New Calendar' dialog box with the 'Selected' tab active. The 'Calendar Name' text input field is highlighted with a black border, indicating it is the focus of the next step.

Figure 5-9. Calendar Name field on the Selected Tab

4. Click the **Hours** tab.

Result: The **Hours** tab opens with the following fields available: **Start Date**, **End Date**, **Fixed Due Date**, and for each day of the week, **Open Time**, and **Close Time**, **Overnight Loans Due**, and **Overnight Loans In Effect** (see [Figure 5-10](#)).

Edit Calendar:
 Selected | Hours | Exception Dates | Term Loans
 Start Date: 07/02/2002 End Date: Fixed Due Date:
Overnight Loans.....

	Open Time	Close Time	Due	In Effect
Sunday:	Closed	Closed		
Monday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Tuesday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Wednesday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Thursday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Friday:	08:00 AM	08:00 AM	10:00 AM	12:00 AM
Saturday:	08:00 AM	12:00 AM	10:00 AM	11:00 PM

 Save Cancel

Figure 5-10. Hours Tab

**TIP:**

When entering date information, a pop-up calendar can be accessed by clicking the down arrow in the date field. Also, when entering time information a pop-up clock can be accessed by placing the cursor in a time field and doing a right-click with the mouse.

5. Enter the start date in the **Start Date** field.
6. Enter an end date and fixed due date in the **End Date** and **Fixed Due Date** fields if wanted.
7. In the **Open Time** field, enter the open time for each day of the week the desk is open.
8. In the **Close Time** field, enter the close time for each day of the week the desk is open.

NOTE:

If your closing time is in the next day, a sunrise icon displays next to the close time (see [Figure 5-11](#)).

9. If your site uses the fixed due time option for hourly and minutely overnight loans, enter the times in the **Overnight Loans Due** field and in the **Overnight Loans In Effect** fields.

Result: The **Hours** tab is completed (see [Figure 5-11](#)).

	Open Time	Close Time	Overnight Loans.....	
			Due	In Effect
Sunday:	Closed	Closed		
Monday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Tuesday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Wednesday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Thursday:	08:00 AM	10:00 PM	10:00 AM	09:00 PM
Friday:	08:00 AM	08:00 AM	10:00 AM	12:00 AM
Saturday:	08:00 AM	12:00 AM	10:00 AM	11:00 PM

Figure 5-11. Hours Tab with its information

10. Click the **Exception Dates** tab.

Result: The **Exception Dates** tab opens.

11. Click the **New** button if you want to enter a new exception date or click the **Edit** button to edit a date already in the system.

Result: The **Exception Date Settings** dialog box opens (see [Figure 5-12](#)).

Figure 5-12. Circulation Calendar Exception Date Settings dialog box

12. Enter the appropriate exception information in the **Exception Date** fields, clicking the **Open** or **Closed** radio buttons as needed, as well as entering open and close times if necessary.

Entering a date in the first **Exception Date** field only indicates a single exception date.

When entering exception dates, operators can enter a range of dates provided they all have the same information. If the exception dates are all **Open** or **Closed**. If open, the **Open Time** and **Close Time** values must be the same, and if overnight loans are used, the **Due** and **In Effect** times must be the same.

When a range of dates is entered, note that they will display as individual dates in the exception date list. This allows an operator to edit each date individually.

NOTE:

If an exception date already exists and an operator enters a new range of exception dates that includes that exception date, the exception date will be updated and the information provided in the range will be applied to the exception date.

If your site uses the fixed due time option for hourly and minutely overnight loans, enter the appropriate information in the **Overnight Loans Due** and **Overnight Loans In Effect** fields for exception dates.

13. Click the **Add** button.

Result: The dates you added are listed on the **Exception Dates** tab (see [Figure 5-13](#)).

NOTE:

The dates are sorted in ascending order by year, month, and day. This allows the operator to view all the dates from one year together.

Dates	Open Time	Close Time	OL Due Time	OL Effect Time
1/1/2003	Closed	Closed		
7/4/2003	Closed	Closed		
1/1/2004	Closed	Closed		
7/21/2004	Closed	Closed		

Figure 5-13. List of Exceptions Dates displayed on the Exception Dates Tab

14. Click the **Term Loans** tab if you use term loans.

Result: The **Term Loans** tab opens.

15. Click the **New** button to add a new term loan date, or the **Edit** button to edit a term loan date already in the system.

Result: The **Circulation Calendar Term Settings** dialog box opens (see [Figure 5-14](#)).

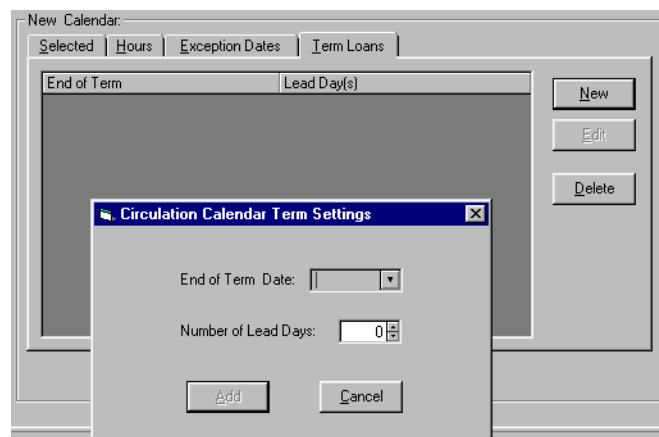


Figure 5-14. Circulation Calendar Term Settings dialog box

16. Enter an end of term date in the **End of Term Date** field, and a number in the **Number of Lead Days** field, then click the **Add** button.

Result: The term loan information is defined.

17. Click the **Save** button to save the calendar.

Result: The calendar is now listed as a Circulation Calendar (see [Figure 5-15](#)) in the **Circulation - Calendars** workspace.

Figure 5-15. Circulation - Calendars Workspace with new calendar added

Editing Circulation Calendars

Circulation Calendars may be edited. Any changes affect future circulation transactions only.

You can change any or all information about any of your Calendars or add new ones. If you have an emergency closing, enter the date(s) as an Exception Date(s) as soon as possible.



Procedure 5-3. Editing a Circulation Calendar

Use the following to edit a Circulation Calendar.

1. Access the **Circulation - Calendars** workspace.
2. Highlight the calendar you want to edit and click the **Edit** button.
3. To edit
 - a. The **Calendar Name** field, place your cursor in the field, enter the name of the calendar, and click the **Save** button.
 - b. Information on the **Hours** tab, changing any dates or hours, place your cursor in the field, enter the appropriate information, and click the **Save** button.
 - c. Information on the **Exception Dates** tab, highlight the date you want to edit and click the **Edit** button, enter the appropriate information in the fields of the **Exception Date Settings** dialog box, then click the **Update** button (see [Figure 5-16](#)).

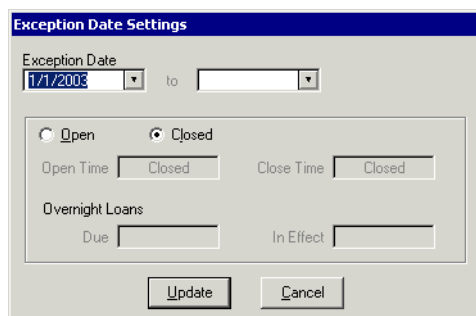


Figure 5-16. Exception Date Settings dialog box

- d. Information on **Term Loans** tab, highlight what you want to edit and click the **Edit** button, enter the appropriate information in the fields of the **Circulation Calendar Term Settings** dialog box, then click the **Update** button (see [Figure 5-17](#)).
-

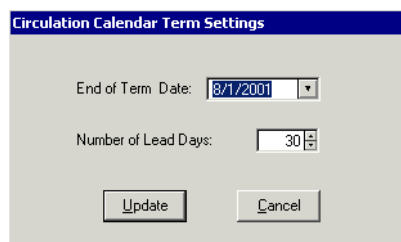


Figure 5-17. Circulation Calendar Term Settings dialog box

4. Click the **Save** button to save your changes. Otherwise, click the **Cancel** button if you do not want to keep the changes.
-

Deleting Exception Dates

Operators can delete exception dates as needed.

When deleting exception dates, operators can select more than one date at a time for deletion ([Figure 5-18](#)) by using standard Microsoft Windows functionality, that is, the **Ctrl** and **Shift** buttons. Notice that the **Edit** button is not available, as operators cannot edit multiple dates.

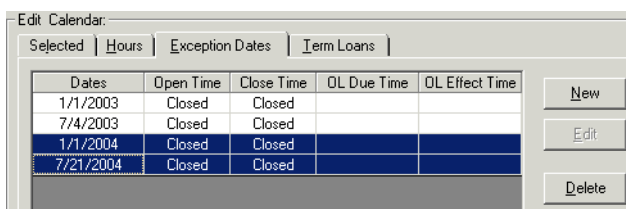


Figure 5-18. Multiple exception dates selected to delete

After deletion, the system will return to the **Exception Dates** tab with the next date in the list highlighted (see [Figure 5-19](#)).

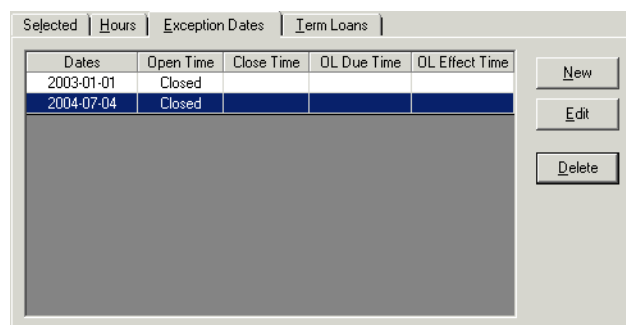


Figure 5-19. The exception date following the last date deleted is highlighted

Deleting Term Loan Information

Operators can delete end of term dates and lead days as needed.

When deleting this information, operators can select more than one date/lead day combination at a time for deletion by using standard Microsoft Windows functionality.

Editing Multiple Circulation Calendars

The **Edit Multiple** option enables you to make the same changes to several calendars at the same time. For **Edit Multiple** to be an active button, you need to select more than one calendar under the **Names** heading by using either **Shift+click** or **Ctrl+click**.

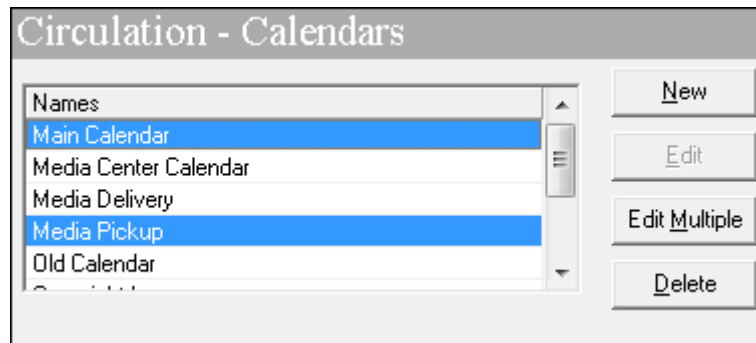


Figure 5-20. Edit Multiple

After clicking **Edit Multiple**, the Edit Calendar section of the Circulation - Calendars dialog box opens.

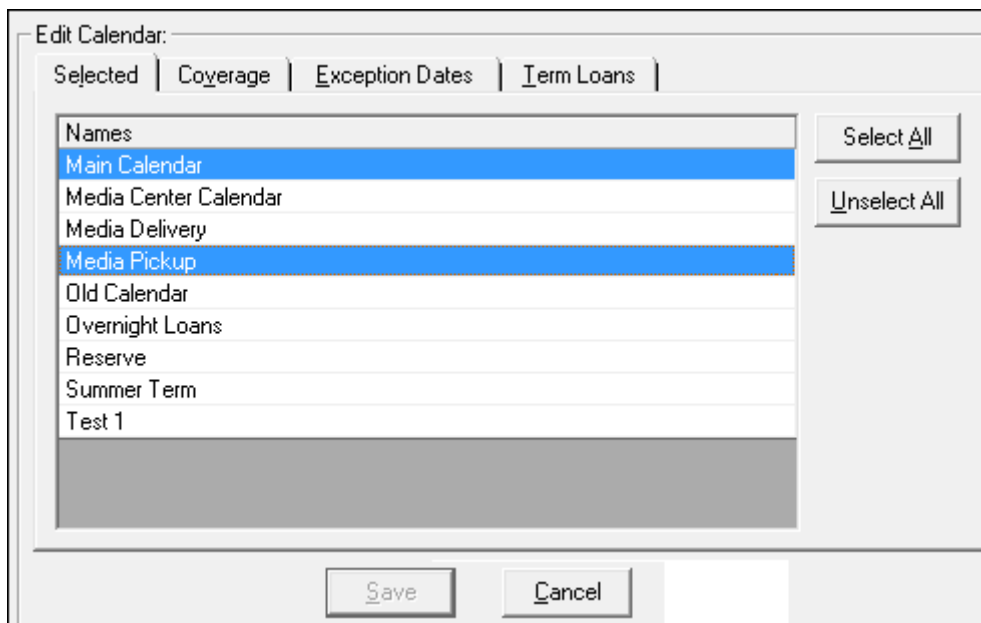


Figure 5-21. Edit Calendar Section

The Edit Calendar section displays the following tabs:

- [Selected Tab](#) on [page 5-29](#)

- [Coverage Tab](#) on [page 5-29](#)
- [Exception Dates Tab](#) on [page 5-30](#)
- [Term Loans Tab](#) on [page 5-30](#)

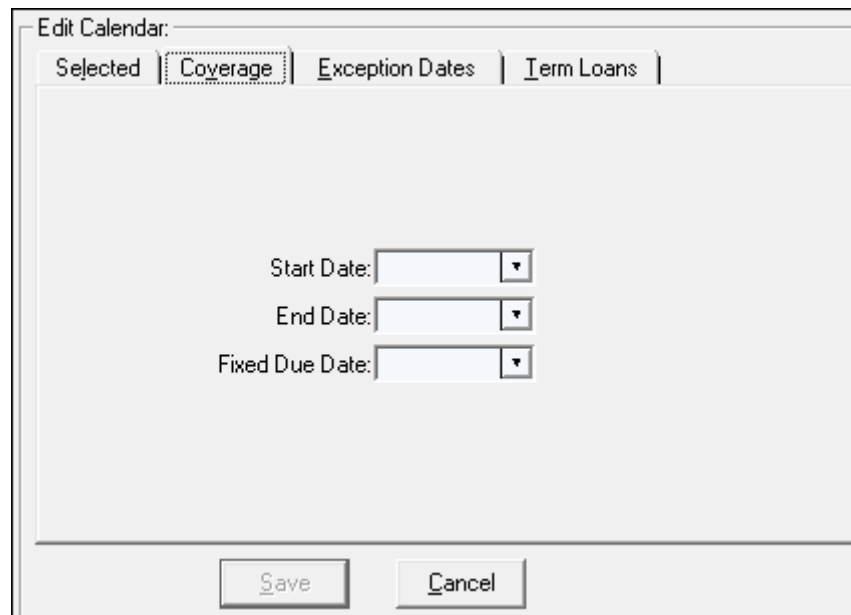
Selected Tab

From the Selected tab, you can continue to modify your selection of calendars to edit using **Shift+click**, **Ctrl+click**, **Select All**, or **Unselect All**.

Coverage Tab

The Coverage tab provides the following options:

- Start Date
- End Date
- Fixed Due Date



The screenshot shows a dialog box titled "Edit Calendar:". It has four tabs: "Selected", "Coverage", "Exception Dates", and "Term Loans". The "Coverage" tab is currently selected. Inside the dialog, there are three labels with corresponding input fields and dropdown arrows: "Start Date:", "End Date:", and "Fixed Due Date:". At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

Figure 5-22. Coverage Tab

Exception Dates Tab

From the Exception Dates tab, you can add, update, or remove exception dates. Refer to the exception dates explanation in [Exception Dates Tab](#) on [page 5-14](#) for more information.

The screenshot shows the 'Edit Calendar' dialog box with the 'Exception Dates' tab selected. The dialog has four tabs: 'Selected', 'Coverage', 'Exception Dates', and 'Term Loans'. The 'Exception Dates' tab contains a table with the following headers: 'Dates', 'Open Time', 'Close Time', 'OL Due Time', and 'OL Effect Time'. To the right of the table are three buttons: 'Add', 'Update', and 'Remove'. Below these buttons is a text box that reads: 'Exceptions will be updated in calendars with exceptions on the supplied dates and added to calendars without existing exceptions on the supplied dates.' At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Dates	Open Time	Close Time	OL Due Time	OL Effect Time

Add
Update
Remove

Exceptions will be updated in calendars with exceptions on the supplied dates and added to calendars without existing exceptions on the supplied dates.

Save Cancel

Figure 5-23. Exception Dates Tab

When the calendars are saved:

- If the calendar has an existing exception for a supplied date, the exception will be replaced in the calendar with the new details of the supplied exception
- If the calendar does not have an existing exception for a supplied date, the exception will be added to the calendar

Term Loans Tab

From the Term Loans tab, you can add, update, or remove term loan settings. Refer to the term loan settings explanation in [Term Loans Tab](#) on [page 5-16](#) for more information.

Edit Calendar:

Selected | Coverage | Exception Dates | Term Loans

End of Term	Lead Day(s)

Add

Update

Remove

Term loans will be updated in calendars with term loans on the supplied dates and added to calendars without existing term loans on the supplied dates.

Save Cancel

Figure 5-24. Term Loans Tab

When the calendars are saved:

- If the calendar has an existing term loan for a supplied date, the term loan will be replaced in the calendar with the new details of the supplied term loan
- If the calendar does not have an existing term loan for a supplied date, the term loan will be added to the calendar

Deleting a Circulation Calendar

You may delete Circulation Calendars providing the calendar is not currently associated with a Circulation Policy Group.

If an operator attempts to delete a calendar that is associated with a Circulation Policy Group, a warning message stating why the deletion is not allowed displays (see [Figure 5-25](#)). A calendar that is associated with a Circulation Policy Group may not be deleted. It must be removed from the group before attempting to delete it.

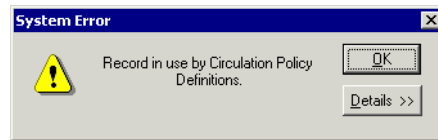


Figure 5-25. Message received when unable to delete a Circulation Calendar



Procedure 5-4. Deleting a Circulation Calendar

Use the following to delete a Circulation Calendar.

1. Access the **Circulation - Calendars** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Calendars** button in the Circulation listbar.

Result: The **Circulation - Calendars** workspace opens.

2. Select the Circulation Calendar you want to delete, then click the **Delete** button.

(You may also use **Shift+click** or **Ctrl+click** to select multiple calendars for deletion.)

Result: If it is not associated with a Circulation Policy Group, the system will still supply a warning prompt requiring you to confirm your decision to delete a Calendar (see [Figure 5-26](#)).

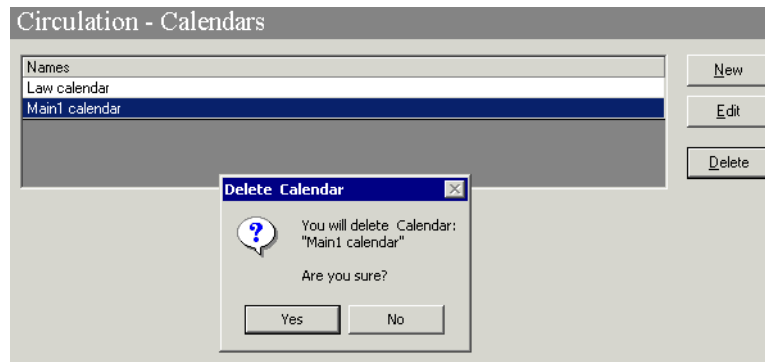


Figure 5-26. Warning prompt after selecting a calendar to delete

3. Click **Yes** if you want to delete the calendar.

Result: The calendar is deleted.



IMPORTANT:

Once a Calendar is deleted, it is not archived on the system.

Circulation - Miscellaneous

The **Circulation - Miscellaneous** workspace allows you to specify additional circulation related policies. The following features are set up here:

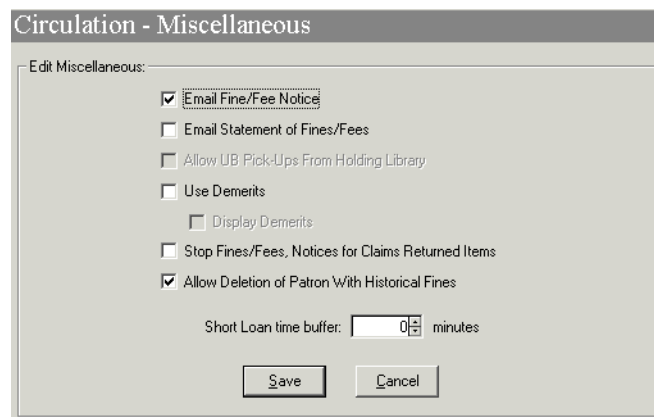
- Email Fine/Fee Notices and Statement of Fines/Fees
- Allow UB Pick-Ups from Holding Library
- Use Demerits and Display Demerits
- Stop Fines/Fees, Notices for Claims Returned Items
- Short Loan Time Buffer

Security

Operators linked to a Master security profile, where the **Circulation Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Circulation - Miscellaneous** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Circulation - Miscellaneous Workspace

[Figure 5-27](#) displays the **Circulation - Miscellaneous** workspace.



The screenshot shows a window titled "Circulation - Miscellaneous" with a sub-header "Edit Miscellaneous:". Below this, there are several checkboxes and a text input field. The checkboxes are: "Email Fine/Fee Notice" (checked), "Email Statement of Fines/Fees" (unchecked), "Allow UB Pick-Ups From Holding Library" (unchecked), "Use Demerits" (unchecked), "Display Demerits" (unchecked), "Stop Fines/Fees, Notices for Claims Returned Items" (unchecked), and "Allow Deletion of Patron With Historical Fines" (checked). Below the checkboxes is a text input field labeled "Short Loan time buffer:" with the value "0" and a unit "minutes". At the bottom of the window are two buttons: "Save" and "Cancel".

Figure 5-27. Circulation - Miscellaneous Workspace

[Table 5-6](#) provides names, descriptions, locations, if required, and the type and range requirements for the fields in the **Circulation - Miscellaneous** workspace.

Table 5-6. Fields in the Circulation - Miscellaneous Workspace

Name	Description	Required	Type and Range
Email Fine/Fee Notice	When checked, this sends all Fine/Fee notices by e-mail, providing the patron has a valid e-mail address. Leave unchecked to print these notices. NOTE: This setting applies to all Policy Groups.	No	Check box The default is unchecked.
Email Statement of Fines/Fees	When checked, this sends all Statements of Fines/Fees by e-mail, providing the patron has a valid e-mail address. Leave unchecked to print these notices. NOTE: This setting applies to all Policy Groups.	No	Check box The default is unchecked.
Allow UB Pick-Ups From Holding Library	When checked, items will be paged at the Holding library. See the <i>Voyager Universal Borrowing User's Guide</i> for more information.	No Active for sites using Universal Borrowing.	Check box The default is unchecked.
Use Demerits	When checked, the overdue penalty will be a demerit point, not a monetary fine.	No  CAUTION: <i>Do not select this check box without first reviewing the Demerits documentation</i> See the <i>Voyager Circulation User's Guide</i> for information about the Demerits feature.	Check box The default is unchecked.

Table 5-6. Fields in the Circulation - Miscellaneous Workspace

Name	Description	Required	Type and Range
Display Demerits	When checked, the demerit tabs in the Circulation module display. If this is not checked only the fine/fee tabs display.	No This check box is only available if the Use Demerits check box is checked.	Check box The default is unchecked.
Stop Fines/Fees, Notices for Claims Returned Items	When checked, when an operator assigns the Claims Returned item status to an item, overdue fines (or demerits), replacement and lost processing fees, accrual of fines, and overdue notices will stop.	No	Check box The default is unchecked.
Allow Deletion of Patron with Historical Fines	When checked, an administrator may purge patron records that have historical fines via Circjob 39.	No	Check box The default is unchecked.
Short Loan Time Buffer	The length in time used to separate the end of one short loan booking and the beginning of the next. This makes the item unavailable for short loan requests during this time.	No	0 - 9999 minutes.

NOTE:

If notices are to be sent by e-mail and the patron record contains no valid e-mail address, the notice is still produced. It can be printed and sent by regular mail.

Stop Fines/Fees, Notices for Claims Returned Items

If the **Stop Fines/Fees, Notices for Claims Returned Items** check box is checked, when an operator assigns the Claims Returned item status to an item, overdue fines (or demerits), replacement and lost processing fees, accrual of fees, and overdue notices stop. Any current fines (or demerits) are applied to the patron as if the item was discharged. If the item is subsequently found and discharged, there will be no additional assessment of fines.

Checking the **Stop Fines/Fees, Notices for Claims Returned Items** check box impacts Circulation Batch jobs number 1, 2, 12, and 30. The Lost-System Applied status is applied, no associated fines or fees will be applied to the patron. Also, no overdue notices will be created for items that have the Claims Returned status.

Completing the Circulation - Miscellaneous Workspace

This section provides step-by-step instructions on how to complete the **Circulation - Miscellaneous** workspace in the System Administration module.



Procedure 5-5. Completing the Circulation - Miscellaneous Workspace

Use the following to complete the **Circulation - Miscellaneous** workspace.

1. Access the **Circulation - Miscellaneous** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Miscellaneous** button in the Circulation listbar.

Result: The **Circulation - Miscellaneous** workspace opens (see [Figure 5-28](#)).

Figure 5-28. Circulation - Miscellaneous Workspace

2. Check the check boxes to enable wanted features.
3. Enter the time in the **Short Loan time buffer** field if wanted.
4. Click the **Save** button to save this information or click the **Cancel** button if you do not want to keep the information.

Result: When saved, the system closes the **Circulation - Miscellaneous** workspace.

Editing the Information in the Circulation - Miscellaneous Workspace

Sites may change any or all of the information on the **Circulation - Miscellaneous** workspace. Any changes affect future circulation transactions only.



Procedure 5-6. Editing the Information in the Circulation - Miscellaneous Workspace

Use the following to edit the information on the **Circulation - Miscellaneous** workspace:

1. Access the **Circulation - Miscellaneous** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Miscellaneous** button in the Circulation listbar.

Result: The **Circulation - Miscellaneous** workspace opens.

2. Make changes to the check boxes and fields you want to edit.
3. Click the **Save** button to save the changes. Click the **Cancel** button if you do not want to keep the changes.

Result: The information has been edited if Save was selected.

Patron Groups

A Patron Group refers to library users who share similar characteristics that determine their circulation privileges.

Patron Groups are used

- to determine a patron's circulation privileges.
- to determine the point at which various patron blocks become effective.

Security

Operators linked to a Master security profile, where the **Circulation Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Circulation - Patron Groups** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Rules for Patron Groups

Patron Groups are added to the system during the initial patron load. After that load, administrators may create additional patron groups. There is no limit on the number of Patron Groups you can define.

Once you have defined your Patron Groups, you can always edit the information or add new ones. You cannot delete a Patron Group if any patron record is assigned to it.

If your site is using demerits, you can select the Patron Group(s) to which you want to apply demerits and the maximum demerits threshold number. See the *Voyager Circulation User's Guide* for more information.

Patron Groups Workspace

Creating and editing patron groups is done in the **Patron Groups** workspace. Additionally, global, that is cluster-wide, charge limits are defined here, see [Defining Circulation Blocks](#) on [page 6-1](#).

When first entering the workspace, the top half ([Figure 5-29](#)) lists the codes and names of any Patron Groups already defined.

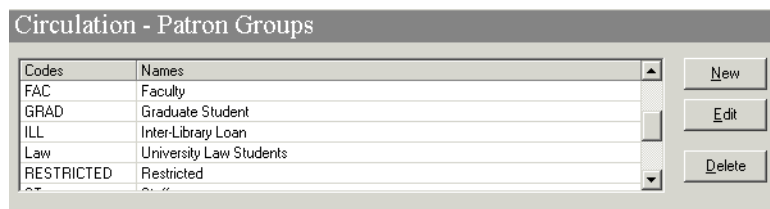
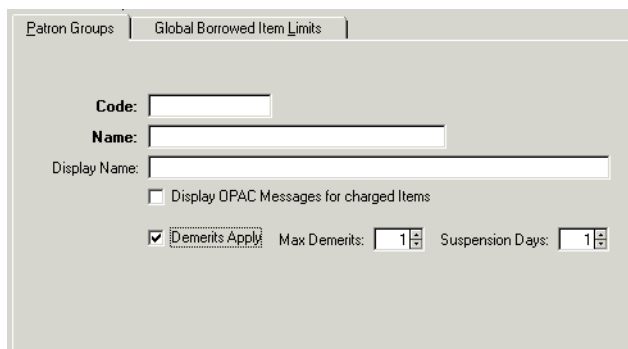


Figure 5-29. Patron Groups Workspace (Top Half)

After clicking either the **New** or **Edit** button, the bottom half of the **Patron Group** workspace opens ([Figure 5-30](#)) to the **Patron Groups** and **Global Borrowed Item Limits** tabs. In this example, the fields are blank because the **New** button was selected.

NOTE:

If demerits are enabled, additional demerits related fields also display; see [Figure 5-30](#).

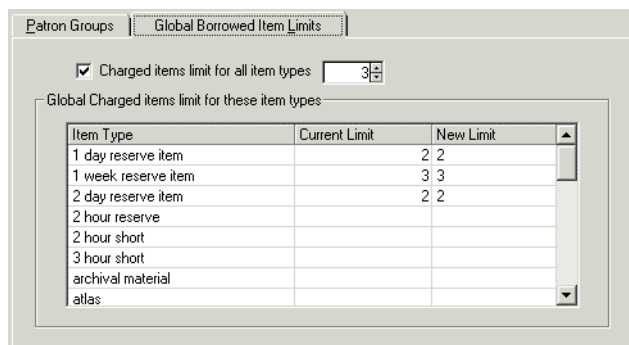


The screenshot shows the 'Patron Groups' tab with the 'Global Borrowed Item Limits' sub-tab selected. The form contains the following fields and options:

- Code:** [Text input field]
- Name:** [Text input field]
- Display Name:** [Text input field]
- ☐ Display OPAC Messages for charged Items
- ☒ Demerits Apply
- Max Demerits:** [Spin box with value 1]
- Suspension Days:** [Spin box with value 1]

Figure 5-30. Patron Group Tab Showing Demerits fields

[Figure 5-31](#) displays the **Global Borrowed Item Limits** tab of the **Patron Groups** workspace.



The screenshot shows the 'Global Borrowed Item Limits' tab. It includes a checkbox for 'Charged items limit for all item types' (checked) and a spin box with the value 3. Below this is a table titled 'Global Charged items limit for these item types'.

Item Type	Current Limit	New Limit
1 day reserve item	2	2
1 week reserve item	3	3
2 day reserve item	2	2
2 hour reserve		
2 hour short		
3 hour short		
archival material		
atlas		

Figure 5-31. Global Borrowed Item Limits Tab

[Table 5-7](#) provides names, descriptions, if the field is required, and type and range requirements for the fields in the **Circulation - Patron Groups** workspace.

Table 5-7. Fields in the various Circulation - Patron Groups Workspace

Name	Description	Required	Type and Range
Patron Groups Tab:			
[Patron Group] Code	The code given to the Patron Group. This code must be unique for each patron group. NOTE: If you are creating a status patron group, this must also be unique from any reserved parameter found in the <code>opac.ini</code>. For example, you cannot use <i>InProcess</i>, as it is used as an item status.	Yes	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 10 characters.
Patron Group Name	The name for the Patron Group.	Yes	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 25 characters.
Display Name	Name that displays in WebVoyage.	No	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 40 characters.

Table 5-7. Fields in the various Circulation - Patron Groups Workspace

Name	Description	Required	Type and Range
Display OPAC Messages for charged items check box	When checked, if your site uses pseudo-patron groups, a message in the OPAC will display when an item is charged to a pseudo-patron group. See Display OPAC Messages for charged items check box on page 5-43 . See the <i>Voyager Web-Voyage User's Guide</i> for more information.	No	Check box The default is unchecked.
Demerits Apply check box	When checked, it enables demerits to be assessed to the particular patron group. See the <i>Voyager Circulation User's Guide</i> for more information.	No NOTE: Displays only if the Use Demerits check box in the Circulation-Miscellaneous workspace is selected.	Check box The default is unchecked.
Max Demerits	The threshold number of demerits which, if reached or exceeded, enables blocks or suspension.	Yes, if Demerits Apply is checked. NOTE: Displays if Demerits Apply is selected.	0.01-999.99 demerits
Suspension Days	The number of days patron will be suspended.	Yes, if Demerits Apply is checked. Displays if Demerits Apply is selected.	1-999 days
Global Borrowed Item Limits Tab:			
Charged items limit for all item types	When selected, a global limit for the number of charged items applies to patrons of this group. See Defining Circulation Blocks on page 6-1 .	No	Check box If not selected, there is no limit.

Table 5-7. Fields in the various Circulation - Patron Groups Workspace

Name	Description	Required	Type and Range
[Limit number field]	Total number of items, from any circulation cluster, patrons of this group may borrow.	Yes, if Charged items limit for all item types check box is checked.	Numeric field. 1-9999
Global charged items limit for these item types section This section contains three columns: • Item Type • Current Limit • New Limit See Defining Circulation Blocks on page 6-1 .			
Item Type	List of all item types defined in the System Administration module		Populated by the system.
Current Limit	Total number of items of the particular type, from any circulation cluster, that patrons of this patron group can borrow.		Populated by limits defined in the System Administration prior to Voyager 5 release. The upgrade process does this automatically.
New Limit number	Total number of items of the particular item type, from any circulation cluster, that patrons of this group may borrow.		Numeric field. 1 - 9999

Display OPAC Messages for charged items check box

When the **Display OPAC Messages for Charged Items** check box is checked, if your site uses pseudo-patron groups, a message in the OPAC will display when an item is charged to a pseudo-patron group.

This allows libraries to charge an item to a "pseudo-patron" to indicate that the item is kept in a special area or has a special status. Displaying the first and last name information allows the library to use a slightly different message for each specific patron within a pseudo-patron group in order to provide detailed information about special statuses.

For instance, the library may create a pseudo-patron group for study carrels, then use the first and last name in each patron record to store the carrel location and number. Items charged to a given *Carrel* pseudo-patron will display in WebVoyage using the message specified in the *opac.ini*. If the *opac.ini* reads *Carrel=At study carrel \L until \d*, WebVoyage will display *At study carrel lastname until due date*, in place of the *Charged* message, using the last name field from the patron record to identify the carrel.

Creating a Patron Group

This section provides step-by-step instructions on how to create a Patron Group in the System Administration module.



Procedure 5-7. Creating a Patron Group

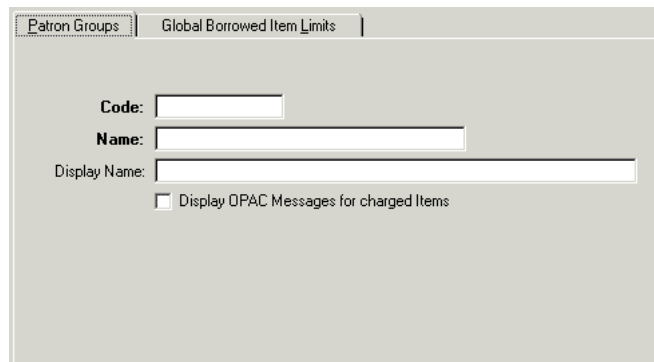
Use the following to create Patron Groups.

1. Access the **Circulation - Patron Groups** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Patron Groups** button in the Circulation listbar.

Result: The **Circulation - Patron Groups** workspace opens.

2. Click the **New** button.

Result: The bottom half of the **Circulation - Patron Groups** workspace opens to the **Patron Groups** tab (see [Figure 5-32](#)).



The screenshot shows a web-based configuration interface with two tabs: "Patron Groups" (selected) and "Global Borrowed Item Limits". The "Patron Groups" tab contains the following fields and options:

- Code:** A text input field.
- Name:** A text input field.
- Display Name:** A text input field.
- ☐ Display OPAC Messages for charged Items

Figure 5-32. Patron Groups Tab

3. Enter a unique patron group code in the **Code** field.

NOTE:

If you are creating a status patron group, this must also be unique from any reserved parameter found in the `opac.ini`. For example, you cannot use *InProcess*, as it is used as an item status.

4. Enter the patron group name in the **Name** field.
5. Enter the display name in the **Display Name** field.

OPTIONAL:

6. Check the **Display OPAC Messages for charged Items** check box, if this is a status Patron Group for which messages display in WebVoyage.

[Figure 5-33](#) shows the **Patron Groups** tab with fields completed.



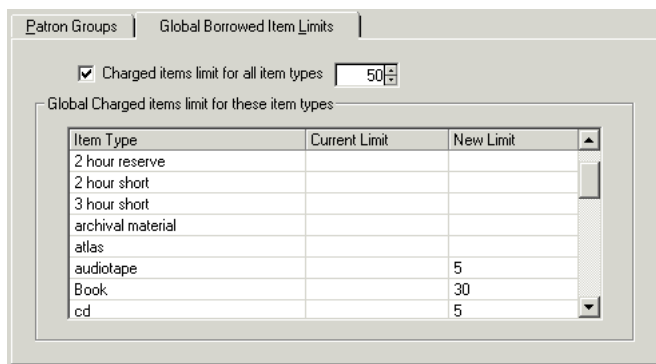
The screenshot shows a web interface with two tabs: "Patron Groups" and "Global Borrowed Item Limits". The "Patron Groups" tab is active. It contains the following fields:

- Code:** A text box containing "ST".
- Name:** A text box containing "Staff".
- Display Name:** A text box containing "Staff".
- ☒ **Display OPAC Messages for charged items**

Figure 5-33. Completed Patron Groups Tab

OPTIONAL:

7. If **Demerits** are enabled, check the **Demerits Apply** check box to assess demerits for this Patron Group. Enter the number of Max Demerits in the **Max Demerits** field. Enter the number of days in the **Suspension Days** field.
8. Click the **Global Borrowed Item Limits** tab and complete wanted fields (see [Figure 5-34](#)).



The screenshot shows the "Global Borrowed Item Limits" tab. It contains the following elements:

- ☒ **Charged items limit for all item types** with a spinner box set to 50.
- Global Charged items limit for these item types** section containing a table:

Item Type	Current Limit	New Limit
2 hour reserve		
2 hour short		
3 hour short		
archival material		
atlas		
audiotape		5
Book		30
cd		5

Figure 5-34. Completed Global Borrowed Item Limits Tab

9. Click the **Save** button to save this patron group or click the **Cancel** button if you do not want to keep the information.

Result: When saved, the system returns to the **Circulation - Patron Groups** workspace and the new Patron Group is listed ([Figure 5-35](#)) in the **Circulation - Patron Groups** workspace.

Circulation - Patron Groups		
Codes	Names	
FAC	Faculty	
GRAD	Graduate Student	
ILL	Inter-Library Loan	
Law	University Law Students	
ST	Staff	

Figure 5-35. Newly-created Patron Group listed

Editing Patron Groups

Sites may change any or all information on Patron Groups or add new ones after their initial patron group load. If you change a Patron Group, that change is reflected throughout the database wherever that information is used. Any changes affect future circulation transactions only.



TIP:

If your library participates in Universal Borrowing with other Voyager sites, it's helpful to let them know if you edit or delete any patron groups. This way they can be sure to run Circjob 33 (see the Voyager Technical User's Guide for more information) to update their listing of patron groups.



Procedure 5-8. Editing a Patron Group

Use the following to edit a Patron Group.

1. Access the **Circulation - Patron Groups** workspace.
2. Highlight the patron group you want to edit and click the **Edit** button.

Result: The **Patron Groups** tab opens.

3. Enter new information in any of the fields you want to edit.

4. Click the **Global Borrowed Item Limits** tab and enter new information in any of the fields you want to edit.
5. Click the **Save** button to save the changes. Click the **Cancel** button if you do not want to keep the changes.

Result: The Patron Group information has been edited if **Save** was selected.

Deleting a Patron Group

Sites can delete any Patron Group if it is no longer in use in a patron record.



Procedure 5-9. Deleting a Patron Group

Use the following to delete a Patron Group.

1. Access the **Circulation - Patron Groups** workspace.
 2. Highlight the patron group you want to edit and click the **Delete** button (see [Figure 5-36](#)).
-

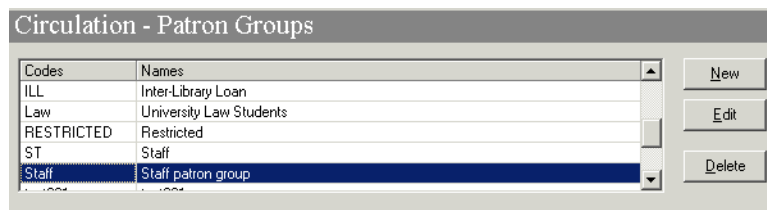


Figure 5-36. Circulation - Patron Groups Workspace with group highlighted

Result: The **Delete Patron Group** dialog box asks for confirmation of the deletion (see [Figure 5-37](#)).



Figure 5-37. Listing after deleting the Patron Group

3. Click the **Yes** button if you want to delete the patron group.

Result: If deleted, the system returns to the **Patron Groups** workspace and the patron group is immediately removed from the listing of patron groups.

NOTE:

If the patron group is in use in a patron record it would not be able to be deleted. A message stating such would display (see [Figure 5-38](#)).

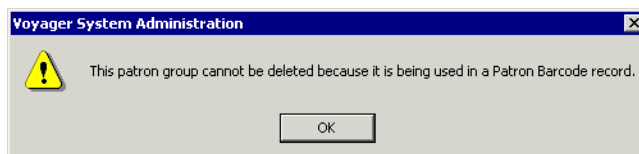


Figure 5-38. Patron Group cannot be deleted message

Patron Note Types

The Patron Note Types configuration option allows you to create, edit, and delete your own custom note types and view the complete list of note types that include the following system-provided types:

- Address
- Barcode
- General
- Phone
- Pop-Up

See [Figure 5-39](#).

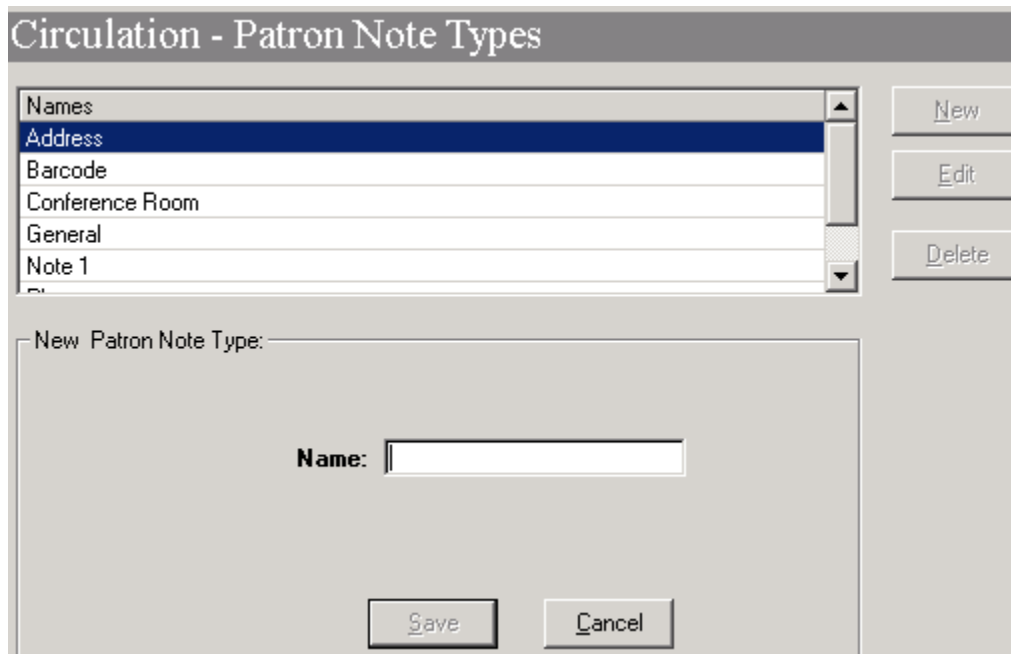


Figure 5-39. Patron Note Types Option

To access Patron Note Types, click the **Patron Note Types** icon located in the Circulation component of the System Administration listbar. Use the **New**, **Edit**, and **Delete** buttons to manage the custom note types you need for your institution. The Patron Note Type name may be up to 25 characters long.

NOTE:

You may not edit or delete the system-provided Patron Note Types. In addition, you may not delete custom-created Patron Note Types that are currently in use.

After you have created the patron note types for your institution in the System Administration client, they can be accessed/managed from the patron record. In the Circulation client, the patron record Notes dialog box (see [Figure 5-40](#)) provides a drop-down list from which to select the type of note you want to view, create, or delete.

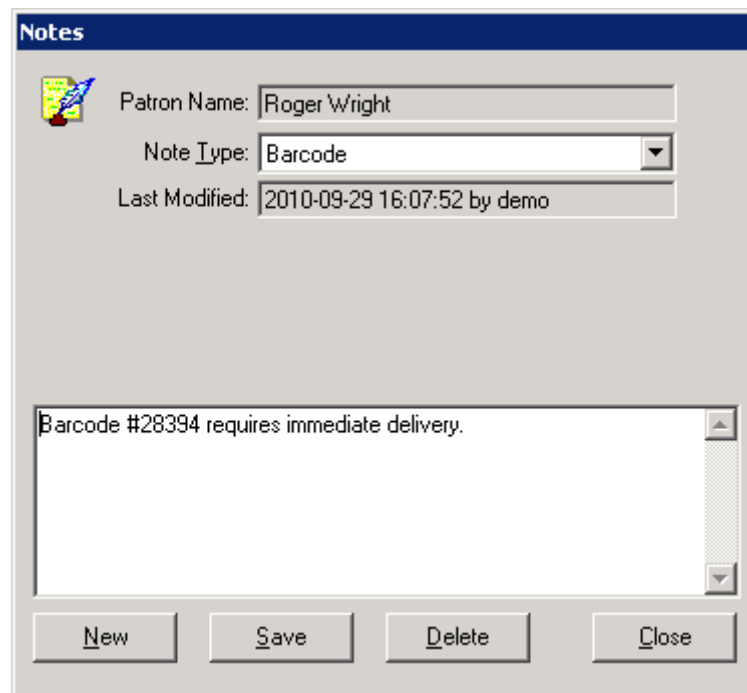
The image shows a software dialog box titled "Notes". It has a light gray background and a dark blue title bar. Inside the dialog, there is a small icon of a notepad and pencil. Below the icon, there are three fields: "Patron Name:" with the text "Roger Wright", "Note Type:" with a dropdown menu showing "Barcode", and "Last Modified:" with the text "2010-09-29 16:07:52 by demo". Below these fields is a large text area containing the text "Barcode #28394 requires immediate delivery." At the bottom of the dialog, there are four buttons: "New", "Save", "Delete", and "Close".

Figure 5-40. Patron Record Notes Dialog Box

Patron Default Dates

The Patron Default Dates option allows you to set patron expiration and purge dates. See [Figure 5-41](#). When a patron record expires, the patron is unable to charge items. However, the record remains in the database until it is purged. To remove patron records from the database, you need to use the patron purge circulation job, Circjob 39 (refer to the Voyager Technical User's Guide).

Circulation - Patron Default Dates

Expiration Date

☒ **Exact Date** 9/21/2011 ▼

☐ **Relative Date** 1 ▼ Year ▼

Purge Date

☒ **Exact Date** 9/30/2011 ▼

☐ **Relative Date** 1 ▼ Year ▼

Save Cancel

Figure 5-41. Patron Default Dates

To access Patron Default Dates, click the **Patron Default Dates** icon located in the Circulation component of the System Administration listbar.

Expiration Date

Use the expiration date options to identify when patron records should be set to expire. The expiration date set in System Administration displays as the default in the Expires field of the Add New Patron Record dialog box in Circulation (see [Figure 5-42](#)).

This date determines when the patron record becomes inactive even though it continues to remain in the database.

The screenshot shows a web application window titled "Add New Patron Record". It has five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Details" tab is active. The form contains the following fields:

- SMS Number:** 847-227-2688
- Expires:** 9/21/2012 (with a dropdown arrow)
- Purge Date:** 9/30/2012 (with a dropdown arrow)
- Department:** Business
- Major:** Finance
- Birth Date:** 8/17/1992 (with a dropdown arrow)

Figure 5-42. Expires/Purge Date Example

The expiration date may be set as an exact date or as a relative date.

The Exact Date option uses the month/day/year format. You may enter the date manually or click the down arrow to display the calendar from which to select a date.

The Relative Date option is set by selecting the relative amount (numeric value) and specifying Day, Month, or Year. To specify that a patron record should expire in 10 months from when it is created, for example, specify 10 in the numeric field and select Month from the drop-down list.

NOTE:

The maximum value for a patron expiration date is 12-31-2382. If you set a relative date that calculates dates beyond this date (such as 9999 months), you will not be able to save the patron records with this date attached.

Purge Date

Use the purge date options to identify when patron records are eligible to be removed from the database. The purge date set in System Administration displays as the default in the Purge Date field of the Add New Patron Record dialog box in Circulation (see [Figure 5-42](#)).

The purge date may be set as an exact date or as a relative date.

The Exact Date option uses the month/day/year format. You may enter the date manually or click the down arrow to display the calendar from which to select a date.

The Relative Date option is set by selecting the relative amount (numeric value) and specifying Day, Month, or Year. To specify that a patron record is eligible for removal from the database in 360 days from when it is created, for example, specify 360 in the numeric field and select Day from the drop-down list.

NOTE:

The maximum value for a patron purge date is 12-31-2382. If you set a relative date that calculates dates beyond this date (such as 9999 months), you will not be able to save the patron records with this date attached.

Circulation Policy Definitions

Each site has one or more departments responsible for circulating items for various locations within the library. Any such department which performs such tasks under the department's own policies and hours of operation may be defined as a Circulation Policy Group.

If your library has multiple circulation departments, each with their own hours of operation and policies, you typically have multiple policy groups.

For your site's Circulation Cluster there must be at least one Circulation Policy Group, which is the set of locations and policies that are applied to its patron groups and items. These policies provide the rules that govern various patron group circulation activities.

Adding a Policy Definition involves the following:

- Name the Circulation Policy Group
- Add the locations
- Set the policies
- Associate the Circulation Calendar(s)

- Associate the Patron Groups
- Associate the Item Types
- Create a default Circulation Matrix
- Create a default Short Loan Circulation Matrix

Security

Operators linked to a Master security profile, where the **Circulation Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Circulation - Policy Definitions** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Circulation Policy Definition Workspace

The **Circulation - Policy Definitions** workspace, as shown in [Figure 5-43](#), displays the names of the circulation policy groups that have already been defined, and allows the administrator to add, edit, or delete circulation policy groups.

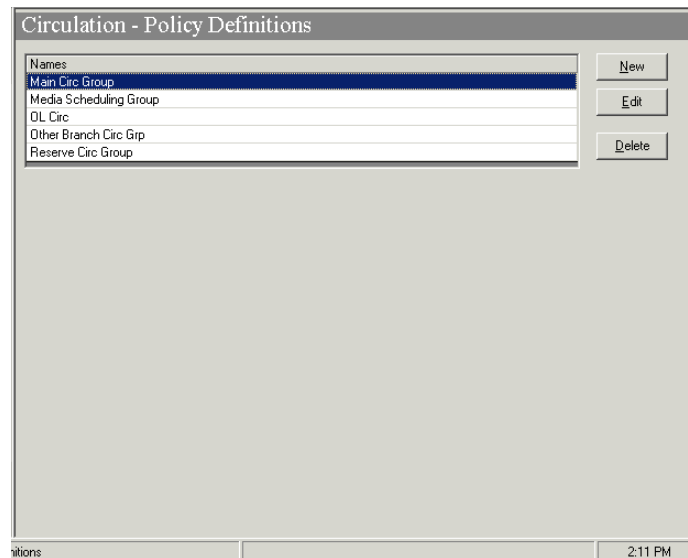


Figure 5-43. Circulation - Policy Definitions Workspace

[Table 5-8](#) describes the fields and buttons that display on the **Circulation - Policy Definitions** screen.

Table 5-8. Circulation - Policy Definitions Workspace Fields and Buttons

Field/Button Names	Description
Names	This column displays the names of the defined circulation policy groups.
New	When this button is clicked, the New Policy Definition: screen appears in the work area as shown in Figure 5-44 .
Edit	When this button is clicked, the Edit Policy Definition: screen appears in the work area as shown in Figure 5-45 .
Delete	This button allows the administrator to remove a policy definition that is highlighted under the Name: column.

The Policy Definition Workspace (New and Edit)

The **New Policy Definition** workspace (see [Figure 5-44](#)) and the **Edit Policy Definition** workspace (see [Figure 5-45](#)) allow the administrator to add or modify policy definitions by populating fields on the following tabs:

- Policy Definition
- Locations
- Policies
- Calendar
- Patrons
- Items
- Matrix
- Short Loan Matrix

NOTE:

The **Matrix** and **Short Loan Matrix** tabs are not available from the **New Policy Definition** workspace. These tabs display in the **Edit Policy Definition** workspace after the circulation policy group has been defined/created in the **New Policy Definition** workspace.

[Figure 5-44](#) shows the **New Policy Definition** workspace that adds circulation policy groups to the database.

The screenshot shows a window titled "Circulation - Policy Definitions". At the top, there is a list of names: "Main Circ Group", "Media Scheduling Group", "OL Circ", "Other Branch Circ Grp", and "Reserve Circ Group". To the right of this list are three buttons: "New", "Edit", and "Delete". Below the list is a section titled "New Policy Definition:" with a tabbed interface. The "Policy Definition" tab is selected, and it contains a text input field labeled "Circ Group Name:". At the bottom of the window are "Save" and "Cancel" buttons. The status bar at the bottom right shows "3:15 PM".

Figure 5-44. New Policy Definition

[Figure 5-45](#) shows the **Edit Policy Definition** workspace that is used to edit circulation policy groups.

The screenshot shows the same "Circulation - Policy Definitions" window, but now the "Edit Policy Definition:" section is active. The "Policy Definition" tab is still selected, but additional tabs like "Locations", "Policies", "Calendar", "Patrons", "Items", "Matrix", and "Short Loan Matrix" are visible. The "Circ Group Name:" field now contains the text "Main Circ Group". The "Save" and "Cancel" buttons remain at the bottom. The status bar at the bottom right shows "3:16 PM".

Figure 5-45. Edit Policy Definition

[Table 5-9](#) describes the buttons that display in the **New Policy Definition** workspace and the **Edit Policy Definition** workspace.

Table 5-9. New/Edit Policy Definitions Workspace Buttons

Button Names	Description
Save	This button saves the new or modified circulation policy group.
Cancel	This button exits the screen without saving changes to the circulation policy group.

Policy Definition Tab

The **Policy Definition** tab, as shown in [Figure 5-45](#), assigns a unique name to the circulation policy group.

[Table 5-10](#) describes the fields on the **Policy Definition** tab.

Table 5-10. Policy Definition Tab Fields

Name	Description	Required	Type and Range
Circ Group Name	The name given to the Circulation Policy Group. Must be unique to the database.	Yes	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 40 characters.

Locations Tab

The **Locations** tab identifies available locations and corresponding characteristics. From this tab, the administrator can update the location settings and alerts by clicking on the **Settings** button.

[Figure 5-46](#) shows the **Locations** tab when the **Circulation Location** radio button is left unmarked.

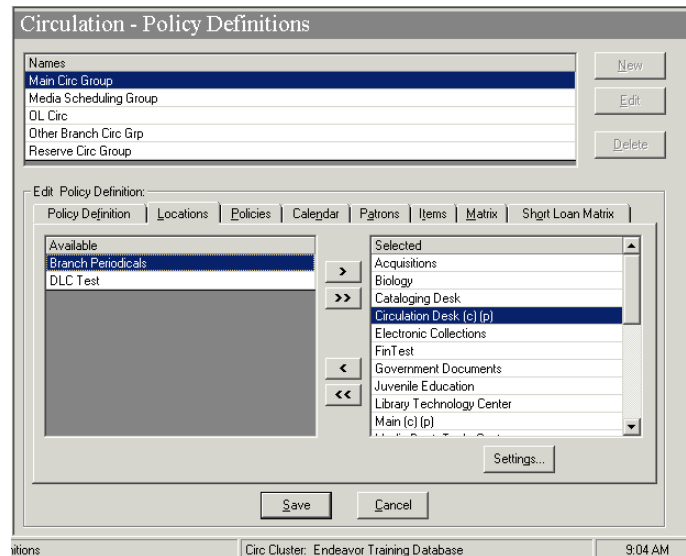


Figure 5-46. Locations Tab

[Table 5-11](#) describes the **Location Settings** dialog box.

Table 5-11. Locations Tab

Field/Button Name	Description	Required	Type and Range
Available	The list of all locations that are <i>not</i> part of any Circulation Policy Group, but are part of the operator's Master Security Profile.	Yes	Choose from the Available list. Locations are defined in System Administration. See Locations on page 10-39 .
Selected	The list of locations that belong to the current Circulation Policy Group.	You must define at least one location per Circulation Cluster	Moved from the Available list.
Settings	This button opens the Locations Settings dialog box. This is only active if a location has been saved and then highlighted in the Selected column.	N/A	button

Table 5-11. Locations Tab

Field/Button Name	Description	Required	Type and Range
>	This button moves highlighted items from the Available column to the Selected column.	N/A	button
<	This button moves highlighted items from the Selected column to the Available column.	N/A	button
>>	This button moves all items from the Available column to the Selected column.	N/A	button
<<	This button moves all items from the Selected column to the Available column.	N/A	button

Location Settings

The **Location Settings** dialog box displays as shown in [Figure 5-47](#) when the location isn't configured for circulation.

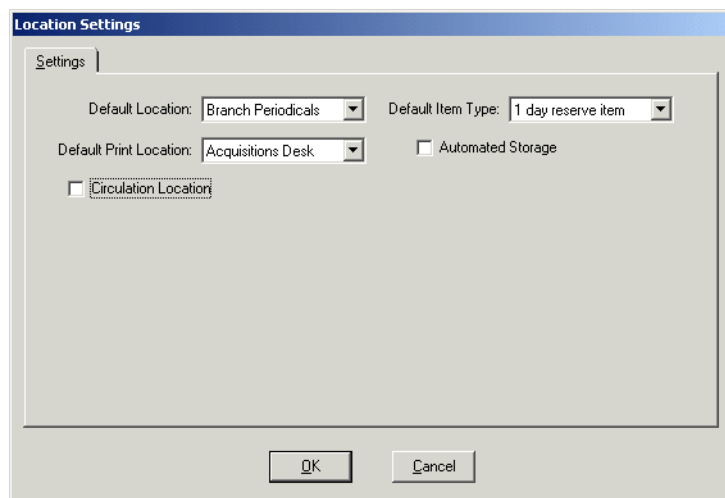


Figure 5-47. Location Settings Without Circulation Location

[Table 5-12](#) describes the **Location Settings** dialog box.

Table 5-12. Location Settings Dialog Box Without Circulation Happening Location

Name	Description	Required	Type and Range
Default Location	The location used whenever an operator working at the circulation location creates a brief bib/holdings/item record. This populates the Permanent location field of the item record.	Yes	Choose from the drop-down list. Locations are defined in System Administration. See Locations on page 10-39 .
Default Item Type	The Item Type used whenever an operator working at the circulation location creates an item record.	Yes	Choose from the drop-down list. Item Types are defined in System Administration. See Item Types on page 10-34 .
Default Print Location	For all notices and reports, Voyager looks at the happening location in the Circulation Policy Group and sends the circulation desk information to the .inp file for the default print location (happening location).	No	Choose from the drop-down list populated by the print locations. Print Locations are defined in System Administration. See Print Locations on page 10-80 .
Automated Storage	When checked, it defines your Circulation Policy's location(s) to be selected as an Automated Storage facility. The automated storage facility stores all currently active barcodes from Voyager. This storage facility is responsible for assigning bin information to the Message Handling System (MHS). If there is no information in the MHS, Voyager assumes the item is not in storage.	No Only active if the site uses Voyager's ARS/Remote Storage extension product.	Check box

Table 5-12. Location Settings Dialog Box Without Circulation Happening Location

Name	Description	Required	Type and Range
Circulation Location	When checked, this becomes a circulation happening location, that is, where circulation activities are performed. You may have more than one happening location for a Policy Group. A (c) displays next to the location in the Selected Locations list when you select this check box as a circulation happening location. See Circulation Locations (Circulation Happening Locations) on page 5-62.	At least one location in a Circulation Policy Group must be deemed a circulation location (happening location).	Check box

Circulation Locations (Circulation Happening Locations)

If you check the **Circulation Location** check box on the **Settings** tab of the **Location Settings** dialog box, the **Circulation Location** section opens and displays additional check boxes that determine what activities can occur at this location (see [Figure 5-48](#)).

NOTE:

Once a location is deemed a circulation location, the **Alerts** tab of the **Location Settings** dialog box is available. See [Circulation Alerts at Discharge and Charge](#) on [page 5-162](#).

Figure 5-48. Settings Tab with Circulation Location

[Table 5-13](#) describes the additional fields and check boxes on the **Location Settings** dialog box.

Table 5-13. Circulation Location section of the Settings Dialog Box Fields

Name	Description	Required	Type and Range
Collect Fines	When checked, an authorized operator can collect payments for any fines/fees at this circulation location.	No	Check box Default is unchecked.
Courtesy Discharge	When checked, an item can be discharged at a location other than the one from which it was originally charged. If not checked, items can only be discharged at the location where it was originally charged. The desk from which the item was charged determines if a foreign desk can discharge it.	No	Check box Default is checked.

Table 5-13. Circulation Location section of the Settings Dialog Box Fields

Name	Description	Required	Type and Range
Due Date Slip Print	When checked, the system automatically prints a Due Date slip according to the circumstances of the circulation transaction when it is performed by an operator at this circulation location unless the operator overrides through a Circulation Session Default selection.	No	Check box Default is checked.
Hold Slip Print	When checked, the system automatically prints a Hold slip according to the circumstances of the circulation transaction when it is performed by an operator at this circulation location unless the operator overrides through a Circulation Session Default selection.	No	Check box Default is checked.
Routing Slip Print	When checked, the system automatically prints a Routing slip according to the circumstances of the circulation transaction when it is performed by an operator at this circulation location unless the operator overrides through a Circulation Session Default selection.	No	Check box Default is checked.
OPAC Suppress for Item on the Fly	When checked, if an operator creates a brief bibliographic, holdings or item record at this location, the display of that information will be suppressed in WebVoyage.	No	Check box Default is unchecked.
Discharge Receipt Print	When checked, the system automatically prints a Discharge Receipt slip according to the circumstances of the circulation transaction when it is performed by an operator at this circulation location unless the operator overrides through a Circulation Session Default selection.	No	Check box Default is unchecked.
Payment Receipt Print	When checked, the system automatically prints a Payment Receipt slip according to the circumstances of the circulation transaction when it is performed by an operator at this circulation location unless the operator overrides through a Circulation Session Default selection.	No	Check box Default is unchecked.

Table 5-13. Circulation Location section of the Settings Dialog Box Fields

Name	Description	Required	Type and Range
Pick up Location	When checked, this defines this location as a valid pickup location for requests made in WebVoyage. A (p) displays next to the location in the Selected Locations list when you select this check box as a circulation happening location.	No The system allows a Circulation Policy Group to have no Pickup Locations.	Check box Default is unchecked.
Shelving Interval and unit field	The number of days/hours/minutes it typically takes for an item discharged at the circulation location to be reshelfed. This interval determines when the system changes an item's status from Discharged (mm/dd/yyyy) to Not Charged.	Yes	0-999 Default is 0. Enter 0 if everything discharged at this location is reshelfed immediately.
In Transit Interval	The number of days it typically takes for an item to be routed either to or from the circulation location. The system considers any item with an In Transit status as missing if the status date plus this interval is earlier than today's date. Circulation batch job 22, Missing In Transit report, lists these items. See the <i>Voyager Reporter User's Guide</i> for information about Circjob 22.	Yes	0-99 Default is 0. Enter 0 if you never route items to or from this location.
Hold Life	The number of days the system keeps a hold request active before it cancels the unfilled request. This interval is added to the current date to generate the default date required for all hold requests.	No	0-999 days Default is 0.
Recall Life	The number of days the system keeps a recall request active before it cancels the unfilled request. This interval is added to the current date to generate the default date required for all recall requests.	No	0-999 days Default is 0.

Policies Tab

[Figure 5-49](#) shows the **Policies** tab of the **Policy Definitions** section.

Figure 5-49. Policies Tab

[Table 5-14](#) describes the check boxes and fields on the **Policies** tab.

Table 5-14. Check boxes and fields in the Policies Tab of the Circulation - Policy Definitions Workspace

Name	Description	Type and Range
Include Lost Item Processing Fee	When checked, this means that a bill for a lost item will always include the processing fee.	Check box The default is unchecked.
Lost Item Processing Fee	Amount of money charged to process a lost item.	00.00 to 999.99

Table 5-14. Check boxes and fields in the Policies Tab of the Circulation - Policy Definitions Workspace

Name	Description	Type and Range
Include Max Fine Amount for Lost Item	When checked, this means that a bill for a lost item always includes the maximum overdue fine, or if the item has been recalled, the maximum recall overdue fine applicable, if your library charges such a fee. The amount is provided on the Settings tab Add - Circulation Policy Matrix Record Settings Dialog Box on page 5-111. NOTE: If this option is checked and the Max Fine Amount is set to \$0.00, any accumulated overdue fines reset to \$0.00 when an item is identified as lost. See Max Fine Amount described in Table 5-19 on page 5-96.	Check box Default is unchecked.
Lost Item Return: remove overdue fines	Select this policy definition option to have the system allow an operator (with the appropriate permissions) remove overdue fines when a lost item is returned.	Check box The default is unchecked.
Lost Item Return: remove processing fee	Select this policy definition option to have the system allow an operator (with the appropriate permissions) remove the lost item processing fee when a lost item is returned.	Check box The default is unchecked.
Lost Item Return: remove replacement fee	Select this policy definition option to have the system allow an operator (with the appropriate permissions) approve the removal of the lost item replacement fee when a lost item is returned.	Check box The default is unchecked.
Lost Item Return: decrement patron lost item count	Select this policy definition option to have the system allow an operator (with the appropriate permissions) decrement the patron's lost item count when a lost item is returned.	Check box The default is unchecked.

Table 5-14. Check boxes and fields in the Policies Tab of the Circulation - Policy Definitions Workspace

Name	Description	Type and Range
Posting type for crediting returned lost item fines	Specify the posting type you prefer for crediting returned lost item fines that are refunded by selecting one of the following types from the drop-down list: • Forgive • Faculty Forgive • Bursar Transfer • E-Kiosk • Error • Payment • Refund • Suspension	Forgive is the default selection.
Count Closed Days/Hours/Minutes for Loan	When this box is checked, circulation allows an item to be due on a day when the library is closed, as defined in the group's active calendar. Otherwise, the item will be due on the next open day. If this box is not checked, and it is an hourly or minutely loan, the loan interval can be rolled over to the next open day. Otherwise, the loan interval cannot be rolled over to the next open day and the loan period is truncated to the institution's closing time. See Calculating Loan Periods for Hourly and Minutely Loans on page 5-13 for additional information. If the Loan Interval is expressed as day, not counting closed days means that the due date is always a day on which the circulation desk is open. In practical terms, this could extend the normal Loan Interval because if a due date would fall on a day the circulation desk is closed, the due date becomes the next open day.	Check box The default is unchecked.
Count Closed Days/Hours/Minutes for Fine	When checked, this includes closed days/hours/minutes, according to the Group's active Calendar, when calculating the overdue fine when an item has been returned late.	Check box The default is unchecked.

Table 5-14. Check boxes and fields in the Policies Tab of the Circulation - Policy Definitions Workspace

Name	Description	Type and Range
Apply Fixed Due Time for Overnight Loans	When checked, this enables the fixed due times and effective times that are set up in the associated Circulation Calendar. Fixed due times allow libraries to specify when an hour- or minute- loan item is due if charged out overnight, and the effective times for that due time to be applied. Fixed Due Times on page 5-12.	Check box The default is unchecked.
Title-level hold: item in transit to hold shelf fulfills request	Select this option to have the system treat an item in transit to the hold shelf the same as when the item is already placed on the hold shelf. As a result, this cancels the hold recall requests on other items attached to the same bibliographic record once an item is placed in transit. Items in transit in this manner are identified with the hold recall status of Pending in Transit.	Check box The default is unchecked.
Allow Title Level Holds on Bibs with No Items - OPAC	Use this option to block patron title-level hold requests attempted from the OPAC Hold or Recall request pages when the bibliographic record has no items (such as missing or lost items). To block these requests, uncheck this option.	Check box The default is checked.
Allow Title Level Holds on Bibs with No Items - Circ	Use this option to block staff title-level hold requests attempted from the Circulation module when the bibliographic record has no items (such as missing or lost items). To block these requests, uncheck this option.	Check box The default is checked.
Renew if Overdue	When checked, if the patron can renew the item, then the patron will be able to renew it even if it is overdue. If not checked, the patron cannot renew an overdue item.	Check box The default is unchecked.
Renew if Recall	When checked, if the patron can renew the item, then the patron will be able to renew it if there is an active recall request. If not checked, the patron cannot renew an item if there is an active recall request.	Check box The default is unchecked.

Table 5-14. Check boxes and fields in the Policies Tab of the Circulation - Policy Definitions Workspace

Name	Description	Type and Range
Renew if Hold	When checked, if the patron can renew the item, then the patron will be able to renew it if there is an active hold request. If not checked, the patron cannot renew an item if there is an active hold request.	Check box The default is unchecked.
Extend Recall Due Date	When checked, the due date for a recalled item is extended past the original due date. The system calculates a new due date based upon the original due date and when the recall was placed, as well as values determined on the Matrix tab.	Check box The default is unchecked.
Short Loan Early Pickup Window	This is the amount of time during which a patron is allowed to pick up the item before the reservation begins. If the item is charged during this early pick up period, the patron will be allowed to keep the item until the end of the period originally scheduled. If an item is picked up earlier than the time entered here, the charge blocked.	0-999 minutes The default is 0.
Short Loan Unclaimed Interval	The amount of time after the short loan is scheduled to begin where a patron can still charge the short loan item. After this period of time the item is considered unclaimed and the reservation expires. Circjob 27 updates the status of current short loan requests and archives expired requests.	0-999 minutes

Calendar Tab

[Figure 5-50](#) shows the **Calendar** tab of the **Policy Definitions** section.

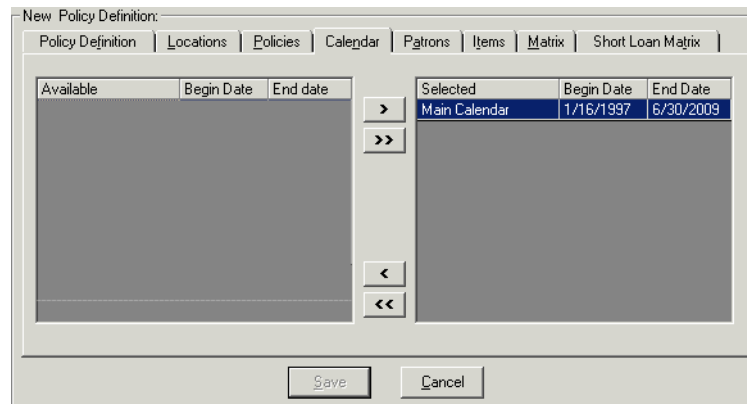


Figure 5-50. Calendar Tab

[Table 5-15](#) describes the fields on the **Calendar** tab.

Table 5-15. Fields in the Calendars Tab of the Circulation - Policy Definitions Workspace

Name	Description	Required	Type and Range
Available Box	The list of available calendars that are part of this Circulation Cluster.	Yes	Choose from Available list. Calendars are defined in System Administration. Circulation Calendars on page 5-8 .

Table 5-15. Fields in the Calendars Tab of the Circulation - Policy Definitions Workspace

Name	Description	Required	Type and Range
Selected Box	The list of selected calendars that are part of this Circulation Cluster.	A calendar must be associated with this Circulation Policy Group. At least one calendar is required for the group. You may choose more than one calendar provided the calendars do not overlap. Multiple Circulation Policy Groups can share the same Calendar.	Select from the drop-down menu.

Patrons Tab and Patron Rules Dialog Box

[Figure 5-51](#) shows the **Patron** tab and [Figure 5-52](#) shows the **Patron Rules** dialog box which is where you provide the policies for each of the patron groups. See [Table 5-16](#) on [page 5-74](#) for a description of the fields and check boxes in the **Patron Rules** dialog box.

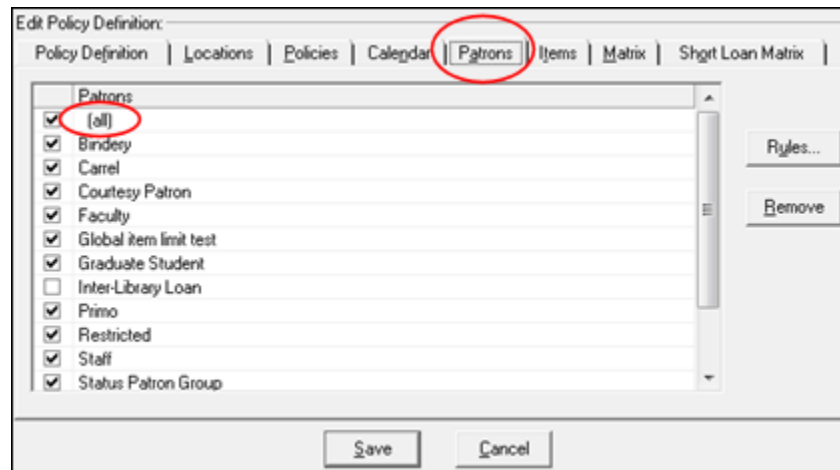


Figure 5-51. Patrons Tab

You must create a default (all) setting which will be used when no other specific settings have been defined.



IMPORTANT:

During a circulation transaction, if the system encounters a Patron Group with no information specified, it defaults to the settings for the (all) Patrons.

If all of your patron groups use these same settings, simply defining the (all) settings is sufficient. Create specific patron group settings for those exceptions to the (all) settings.

NOTE:

On the **Patrons** tab, a check in the check box next to the patron group indicates that patron settings have been saved to the database. These settings may be the same as the (all) settings, different from the (all) settings, or be selected because the **Patron Rules** dialog box was simply saved to the database with no information added.

Patron Rules

☒ Fines/Lost Item Fees Apply Max Outstanding Balance: Min Balance For Notice:

☐ Courtesy Notice Apply ☐ Overdue Notice Apply

☒ Max Items Borrowed in this Policy Group ☐ Max Overdue Recalled Items Apply

☒ Max Number Of Recalls Apply ☐ Max Self-Shelf Returns Apply

☐ Max Claimed Returns Apply ☐ Max Lost Items Apply

☒ Max Call Slip Requests Apply ☐ Max Short Loan Apply

☐ Max Short Loan Titles Apply ☐ Max Short Loan Per Day Apply

☒ Max Overdue Items Apply ☒ Max Hold Requests Apply

☒ Include Pending Hold Requests In The Max Borrowed Items Limit

☒ Place Holds Using The OPAC ☒ Place Recalls Using The OPAC

☐ Place Short Loans Using The OPAC ☒ Place Call Slip Requests Using The OPAC

☒ Email Courtesy Notices ☒ Email Cancellation Notices ☒ Email Item Available Notices

☒ Email Overdue Notices ☒ Email (Other) Overdue Notices

☒ Email Recall Notices ☒ Email (Other) Recall Notices

Figure 5-52. Patron Rules Dialog Box

The limits defined here for patron groups are checked when a patron attempts to charge an item. If the limits are exceeded, the patron is blocked from completing the transaction. In this situation, only an authorized operator can override the block and allow the transaction to continue.

Any blocks that are overridden (by an operator with the appropriate authorization) are identified as exceptions in the Transaction Exceptions report generated with Circjob 24. Refer to the *Voyager Reporter User's Guide* for more information regarding Circjob 24. See [Defining Circulation Blocks](#) on [page 6-1](#).

Table 5-16. Fields and check boxes on the Patron Rules dialog box

Name	Description	Required	Type and Range
Fines/Lost Item Fee Apply	When checked, patrons are liable for overdue fines/lost item fees for at least one Item Type. Leave blank if patrons are exempt from fines/fees.	No	Check box The default is unchecked.

Table 5-16. Fields and check boxes on the Patron Rules dialog box

Name	Description	Required	Type and Range
Max[imum] Outstanding Balance	The amount at which the system blocks the use of the patron barcode associated with this patron group, if the patron has a total amount due (from all fines/fees) equal to or greater than this amount.	Yes, if the Fines/Lost Item Fee Apply check box is checked.	0 to 9999.99 0 prohibits circulation transactions.
Min[imum] Balance for Notice	The minimum total outstanding balance in order to produce a bill to send to the patron. When the balance becomes greater than the amount specified in this field, a bill is produced. Not applicable if the Patron Group is exempt from fines/fees.	Yes, if the Fines/Lost Item Fee Apply check box is checked.	0 to 999.99
Courtesy Notice Apply	When checked, a courtesy notice is sent to the patron at a specified interval (the Courtesy Notice Interval) before the item's due date. However, if the Courtesy Notice Interval in the Circulation Matrix is set to 0, no notice is sent.	No	Check box The default is unchecked.
Overdue Notice Apply	When checked, an overdue notice is sent to the patron when an item is overdue.	No	Check box The default is unchecked.
Max[imum] Items Borrowed in this Policy Group	When selected, this limits the total number of items belonging to this policy group that a patron may borrow.	No	Check box The default is unchecked.
Max[imum] Items Borrowed in this Policy Group [numeric value]	The number at which the system blocks the use of the patron barcode associated with this patron group if the patron has a total number of charged items belonging to this policy group equal to or exceeding this number.	Yes, if Max[imum] Items Borrowed in this Policy Group is checked.	1-999 If not selected, there is no limit.

Table 5-16. Fields and check boxes on the Patron Rules dialog box

Name	Description	Required	Type and Range
Max[imum] Overdue Recalled Items Apply	When checked, this limits the total number of overdue recalled items charged to the patron at one time.	No	Check box The default is unchecked.
Max[imum] Overdue Recalled Items	The number at which the system will block the use of the patron barcode associated with this patron group if the patron has a total number of overdue recalled items equal to this number.	Yes, if Max Overdue Recalled Items Apply is checked.	1-999 Must be equal to or less than the Max Items Borrowed value.
Max[imum] Number of Recalls Apply	When checked, this limits the total number of pending recall requests the patron can have at one time.	No	Check box The default is unchecked.
Max[imum] Number of Recalls	The number at which the system will block the use of the patron barcode associated with this patron group for placing a recall if the number of pending recall requests equals this number.	Yes, if Max Number of Recalls Apply is checked.	1-999
Max[imum] Self- Shelves Returns Apply	When checked, this limits the number of Self-Shelves the patron can accumulate. A self-shelve occurs every time an item presented for charge by a patron must first be discharged from another patron.	No	Check box The default is unchecked.
Max[imum] Self-Shelve Returns	The number at which the system will block the use of the patron barcode associated with this patron group if the patron has a total number of Self-Shelves (displayed as a counter in the patron record) equal to this number. If the limit is reached, this counter must be decreased manually; see the <i>Voyager Circulation User's Guide</i> for more information.	Yes, if Max Self Shelves Returns Apply is checked.	1-999
Max[imum] Claimed Returns Apply	When checked, this limits the number of Claimed Returns a patron can accumulate.	No	Check box The default is unchecked.

Table 5-16. Fields and check boxes on the Patron Rules dialog box

Name	Description	Required	Type and Range
Max[imum] Claimed Returns	The number at which the system will block the use of the patron barcode associated with this patron group if the patron has a total number of Claimed Returns (displayed as a counter in the patron record) equal to this number. When a staff member adds the item status of Claims Returned to an item, the system increments this counter by one.	Yes, if Max Claimed Returns Apply is checked.	1-999
Max[imum] Lost Items Apply	When checked, this limits the number of lost items the patron can accumulate.	No	Check box The default is unchecked.
Max[imum] Lost Items	The number at which the system blocks the use of a patron barcode associated with this patron group if the patron has a total number of Lost Items (displayed as a counter in the patron record) equal to this number. When a staff member adds the Lost Item status to an item, the system increments the lost item counter by one. If the limit is reached, this counter must be decreased manually; see the <i>Voyager Circulation User's Guide</i> for more information.	Yes, if Max Lost Items Apply is checked.	1-999
Max[imum] Call Slip Requests Apply	When checked, this limits the number of call slip requests the patron can submit.	No	Check box The default is unchecked.

Table 5-16. Fields and check boxes on the Patron Rules dialog box

Name	Description	Required	Type and Range
Max[imum] Call Slip Requests	The number at which the system blocks the submission of call slips if the patron has a total number of pending call slip requests (displayed as a patron counter) equal to this number. When a call slip request is made, the counter increments by one. When a call slip is processed or expired, the counter decreases by one. NOTE: The number of call slips a patron submits also counts toward the Max borrowed items limit. Therefore, the number of call slips submitted plus the number of charged items may not exceed the borrowed items limit. NOTE: Processed call slip requests are not included in the Hold or Recall maximum limits.	Yes, if Max Call Slip Requests Apply is checked.	1-999 Since this does count toward the Max Items Borrowed, the number for the Max Call Slip Requests should not exceed the Max Borrowed Items.
Max[imum] Short Loan Apply	When checked, this limits the number of pending short loan requests the patron can submit.	No	Check box The default is unchecked.
Max[imum] Short Loans	The number at which the system blocks the short loan request if the patron has a total number of pending short loan requests (displayed as the Current Short loan counter) equal to this number.	Yes, if Max Short Loan Apply is checked.	0-999
Max[imum] Short Loan Title Apply	When checked, this limits the number of requests a patron can place for a particular bibliographic record within the interval defined in the Set short loan advance booking days displayed interval defined in the OPAC - Miscellaneous workspace.	No	Check box The default is unchecked.
Max[imum] Short Loan Titles	The number at which the system blocks the short loan request if the patron has a total number of requests for a particular bibliographic record equal to this number.	Yes, if Max Short Loan Title Apply is checked.	0-999

Table 5-16. Fields and check boxes on the Patron Rules dialog box

Name	Description	Required	Type and Range
Max[imum] Short Loan Per Day Apply	When checked, this limits the number of pending short loan requests a patron can submit in a day.	No	Check box The default is unchecked.
Max[imum] Short Loan Per Day	The number at which the system blocks any short loan requests made on that day if the patron has a total number of pending short loan requests placed in the same day equal to this number.	Yes, if Max Short Loan Per Day Apply is checked.	0-999
Max[imum] Overdue Items Apply	When checked, this blocks a patron if his or her overdue items have reached this number.	No	Check box The default is unchecked.
Max[imum] Overdue Items	The number at which the system blocks the use of the patron barcode associated with this patron group if the patron has a total number of overdue items equal to this number.	Yes, if Max Overdue Item Apply is checked.	1-999 Must be equal to or less than the Max Items Borrowed number.
Max[imum] Hold Requests Apply	Select this option in order to specify a maximum number of hold requests that a patron may make.	No	Check box The default is unchecked.

Table 5-16. Fields and check boxes on the Patron Rules dialog box

Name	Description	Required	Type and Range
Max[imum] Hold Requests	Specify the maximum number of hold requests permitted. After the patron has reached the maximum number specified, the system blocks the patron from additional requests. The Hold Requests maximum limit is included in the following maximum items charged limits: - On the Hold/Patron Requests page in WebVoyage, a callslip/hold request is blocked if the hold request limit plus the items charged per patron/item policy group reaches the maximum items charged per patron/item policy matrix. - When checking out materials, a circulation block is placed if the hold request limit plus the items charged per institution (or cluster) reaches the maximum items charged per institution. NOTE: Any blocks that are overridden (by an operator with the appropriate authorization) are identified as exceptions in the Transaction Exceptions report generated with Circjob 24. Refer to the <i>Voyager Reporter User's Guide</i> for more information regarding Circjob 24.	Yes, if Max Hold Requests Apply is checked.	1-999
Include Pending Hold Requests in the Max Borrowed Items Limit	Select this check box to include the patron's number of hold requests as part of the total of borrowed (charged) items. When the combination of hold requests and charged items reaches the Max Borrowed Items Limit, the patron is blocked from additional borrowing. NOTE: This option is only available when the Max Items Borrowed in this Policy Group is selected.	No	Check box The default is unchecked.

Table 5-16. Fields and check boxes on the Patron Rules dialog box

Name	Description	Required	Type and Range
Place Holds Using the OPAC	When checked, patrons can place holds in WebVoyáge.	No	Check box The default is unchecked.
Place Recalls Using the OPAC	When checked, patrons can place recalls in WebVoyáge.	No	Check box The default is unchecked.
Place Short Loans Using the OPAC	When checked, patrons can place short loans in WebVoyáge.	No	Check box The default is unchecked.
Place Call Slip Requests Using the OPAC	When checked, patrons can place call slip requests in WebVoyáge.	No	Check box The default is unchecked.
Email Courtesy Notices	When checked, send Courtesy Notices by e-mail. Patron record must contain an e-mail address.	No	Check box The default is unchecked.
Email Cancellation Notices	When checked, send Cancellation Notices by e-mail. Patron record must contain an e-mail address.	No	Check box The default is unchecked.
Email Item Available Notices	When checked, send Item Available Notices by e-mail. Patron record must contain an e-mail address.	No	Check box The default is unchecked.
Email Overdue Notices	When checked, send first Overdue Notices by e-mail. Patron record must contain an e-mail address.	No	Check box The default is unchecked.
Email (Other) Overdue Notices	When checked, send subsequent Overdue Notices by e-mail. Patron record must contain an e-mail address.	No	Check box The default is unchecked.

Table 5-16. Fields and check boxes on the Patron Rules dialog box

Name	Description	Required	Type and Range
Email Recall Notices	When checked, send first Recall Notices by e-mail. Patron record must contain an e-mail address.	No	Check box The default is unchecked.
Email (Other) Recall Notices	When checked, send subsequent Recall Notices by e-mail. Patron record must contain an e-mail address.	No	Check box The default is unchecked.

Email for Fine/Fee Notices

Setting up e-mail for fine/fee notices and statements of fines/fees is done in the System Administration **Circulation - Miscellaneous** workspace. See [Circulation - Miscellaneous](#) on [page 5-33](#). This is a global-level setting, not a policy-level setting.

Items Tab

Use the Items tab to supply circulation policy settings for Item types. From the Items tab, you can define settings for:

- Short loan item types
- Replacement cost
- Order quantity
- Reorder point
- Placing requests on items with the following statuses:
 - Missing
 - Lost - System Applied
 - Lost - Library Applied

Settings can be applied for a single policy/item type (see [Settings](#) on [page 5-83](#)) or for multiple policies/item types (see [Settings Multiple](#) on [page 5-87](#)).

You must create a default (all) item type policy setting that can be used when no other specific settings have been defined. If all of your item types use these same settings, simply defining the (all) settings is sufficient. Create specific item type settings for those exceptions to the (all) settings.

NOTE:

During a circulation transaction, if the system encounters an item type with no information specified, it defaults to the settings for the (all) item type.

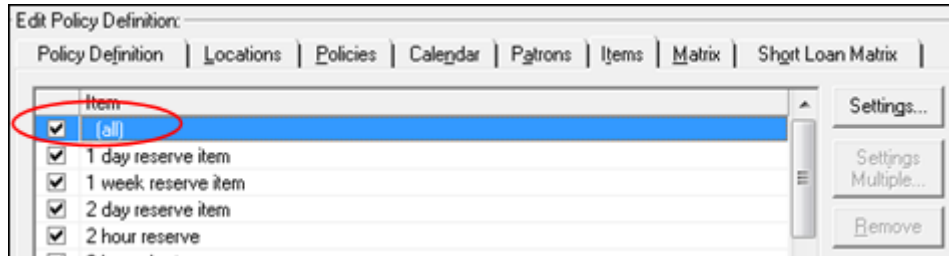


Figure 5-53. Default Setting - All

On the Items tab, a check in the check box next to the item type indicates that item settings have been saved to the database.

NOTE:

A check in the check box for an item type also displays when you access the Item Settings dialog box and click **OK** to save the settings, even when no information has been added/changed.

Settings

You can modify settings for a single item policy type. See [Procedure 5-10, Modifying a Single Item Policy Type](#).



Procedure 5-10. Modifying a Single Item Policy Type

Use the following to modify a single item policy type.

1. Select a row in the Edit Policy Definition area. See [Figure 5-54](#).

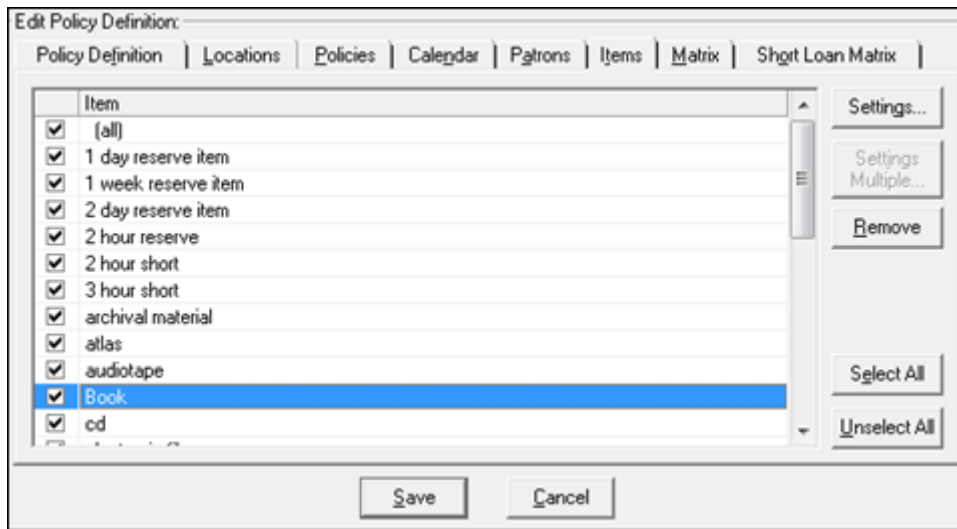


Figure 5-54. Select Row for Settings Edits

2. Click **Settings**.

Result: The Item Settings dialog box displays. See [Figure 5-55](#).

Item Settings

Item Type: Book

☐ Short Loan

Replacement Cost:

Order Quantity:

Reorder Point:

Allow request on items with 'missing' status:

☐ OPAC Hold ☐ OPAC Recall

☐ Circ Hold ☐ Circ Recall

Allow request on items with 'Lost - System Applied' status:

☐ OPAC Hold ☐ OPAC Recall

☐ Circ Hold ☐ Circ Recall

Allow request on items with 'Lost - Library Applied' status:

☐ OPAC Hold ☐ OPAC Recall

☐ Circ Hold ☐ Circ Recall

OK Cancel

Figure 5-55. Item Settings Dialog Box

3. Enter the item type policy settings to match your requirements. See [Table 5-17](#) for a description of the options in the **Item Settings** dialog box.

Table 5-17. Items Settings Options

Name	Description	Type and Range
Short Loan check box	When checked, it designates the item type as a short loan item type. That is, it is used for short loans only. If so, the hold, recall, and call slip check boxes are disabled in the Circulation Policy Matrix.	Check box The default is unchecked.

Table 5-17. Items Settings Options

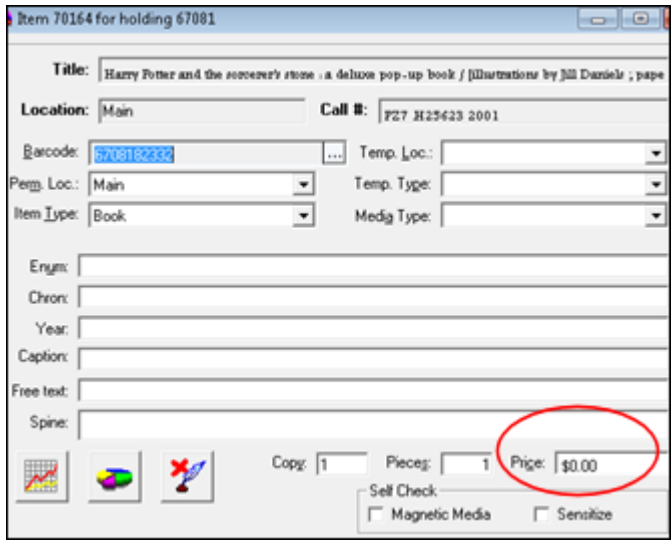
Name	Description	Type and Range
Replacement cost	The replacement cost of the item when the item is lost. If there is no price on the item's item record, this value will be used. NOTE: The lost item replacement fee is used only if there is no specific price in the item record (see Figure 5-56) for the lost item. Libraries wanting to charge a lost fee according to the item's value should provide a price in the item record. Libraries wanting to charge a standard replacement cost should let the price field default to \$0.00 in the item record and define the standard cost in the Replacement Cost field. When an item becomes lost-system applied, if there is no specific price in the item record, the replacement cost defined in item policy settings is used.  The screenshot shows the 'Item Record' form for holding 67081. The title is 'Harry Potter and the sorcerer's stone : a deluxe pop-up book / [illustrations by Jill Daniels ; paper]'. The location is 'Main' and the call number is 'PZ7 H25623 2001'. The barcode is '670818222'. The price field is circled in red and shows '\$0.00'. Other fields include 'Temp. Loc.', 'Perm. Loc.', 'Item Type', 'Medi Type', 'Enym', 'Chron', 'Year', 'Caption', 'Free text', and 'Spine'. There are also icons for 'Copy', 'Pieces', and 'Price' at the bottom.	0.00-99999.99 The default is 0.

Figure 5-56. Item Record Price Field

Table 5-17. Items Settings Options

Name	Description	Type and Range
Order Quantity	For a Distribution Item, set to auto reorder, this specifies the number of that item that is automatically ordered when the number of items in stock is equal to the reorder point. To do this, run Circulation batch job 28, Automatic Orders for Item Distribution. See the <i>Voyager Reporter User's Guide</i> for information.	0-9999 The default is 0.
Reorder Point	For a Distribution Item, this specifies the point at which, when you have this number of items on hand, a new order is automatically placed. To do this, run Circulation batch job 28, Automatic Orders for Item Distribution. See the <i>Voyager Reporter User's Guide</i> for information.	0-9999 The default is 0.
Allow request on items with: Missing status Lost - System Applied status Lost - Library Applied status	Select the OPAC Hold/Recall and/or Circ Hold/Recall options to identify when you want to allow patrons and/or staff the ability to place a request for items with the following statuses: • Missing • Lost - System Applied • Lost - Library Applied	Check box The default is unchecked.

4. Click **OK** to save your settings.

Settings Multiple

You can modify settings for multiple item policy types. See [Procedure 5-11, Modifying Settings for Multiple Item Policy Types](#).



Procedure 5-11. Modifying Settings for Multiple Item Policy Types

Use the following to modify settings for multiple item policy types.

1. Select multiple rows (shift + click) in the Edit Policy Definition area. See [Figure 5-57](#).

NOTE:

You can also use the **Select All** and **Unselect All** buttons to manage your row selections in the Edit Policy Definition area.

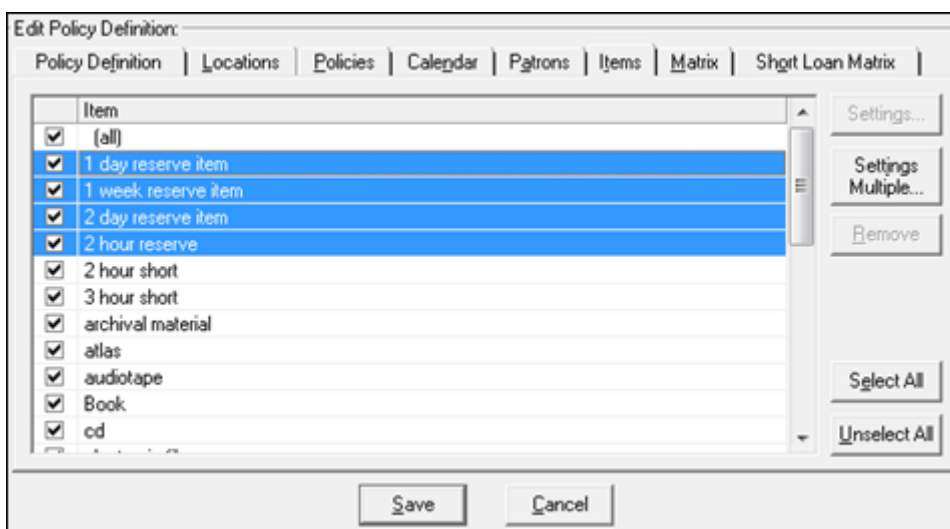
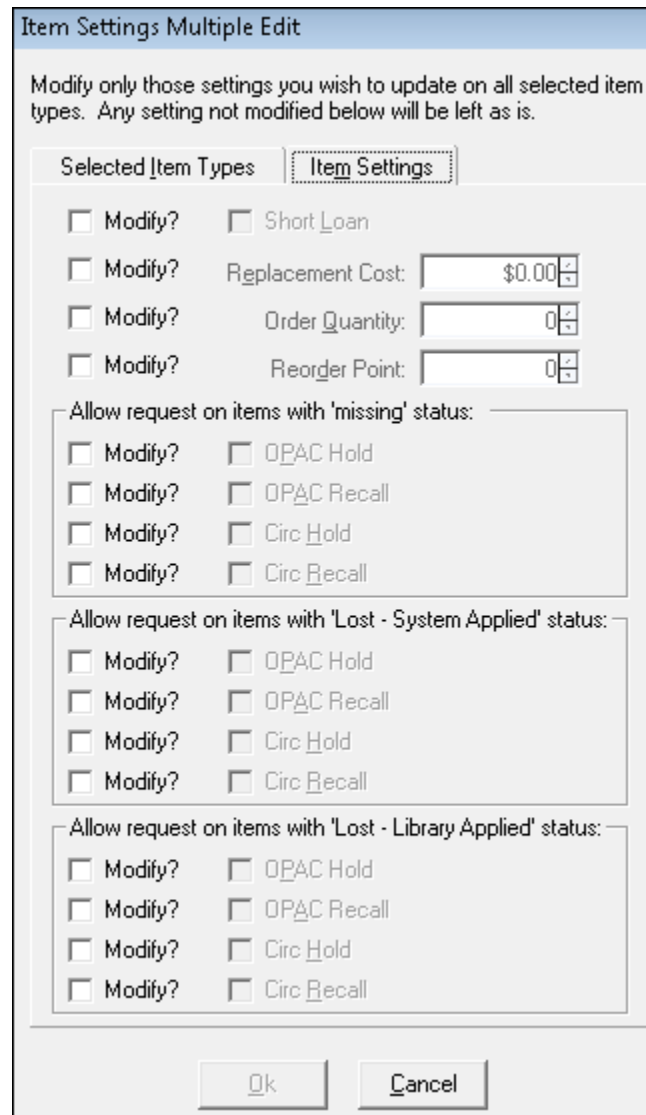


Figure 5-57. Select Multiple Rows for Settings Edits

2. Click **Settings Multiple**.

Result: The Item Settings Multiple Edit dialog box displays. See [Figure 5-58](#).



Item Settings Multiple Edit

Modify only those settings you wish to update on all selected item types. Any setting not modified below will be left as is.

Selected Item Types | **Item Settings**

☐ Modify? ☐ Short Loan
☐ Modify? Replacement Cost:
☐ Modify? Order Quantity:
☐ Modify? Reorder Point:

Allow request on items with 'missing' status:

☐ Modify? ☐ OPAC Hold
☐ Modify? ☐ OPAC Recall
☐ Modify? ☐ Circ Hold
☐ Modify? ☐ Circ Recall

Allow request on items with 'Lost - System Applied' status:

☐ Modify? ☐ OPAC Hold
☐ Modify? ☐ OPAC Recall
☐ Modify? ☐ Circ Hold
☐ Modify? ☐ Circ Recall

Allow request on items with 'Lost - Library Applied' status:

☐ Modify? ☐ OPAC Hold
☐ Modify? ☐ OPAC Recall
☐ Modify? ☐ Circ Hold
☐ Modify? ☐ Circ Recall

Ok Cancel

Figure 5-58. Item Settings Multiple Edit Dialog Box

- From the **Item Settings** tab in the Item Settings Multiple Edit dialog box, you can select **Modify?** for one or more options and, subsequently, change those options to meet your requirements. See [Table 5-17](#) for a description of the options you can modify on the **Item Settings** tab.

To select different item type policy rows for editing, click the **Selected Item Types** tab (see [Figure 5-59](#)) and change your row selections.

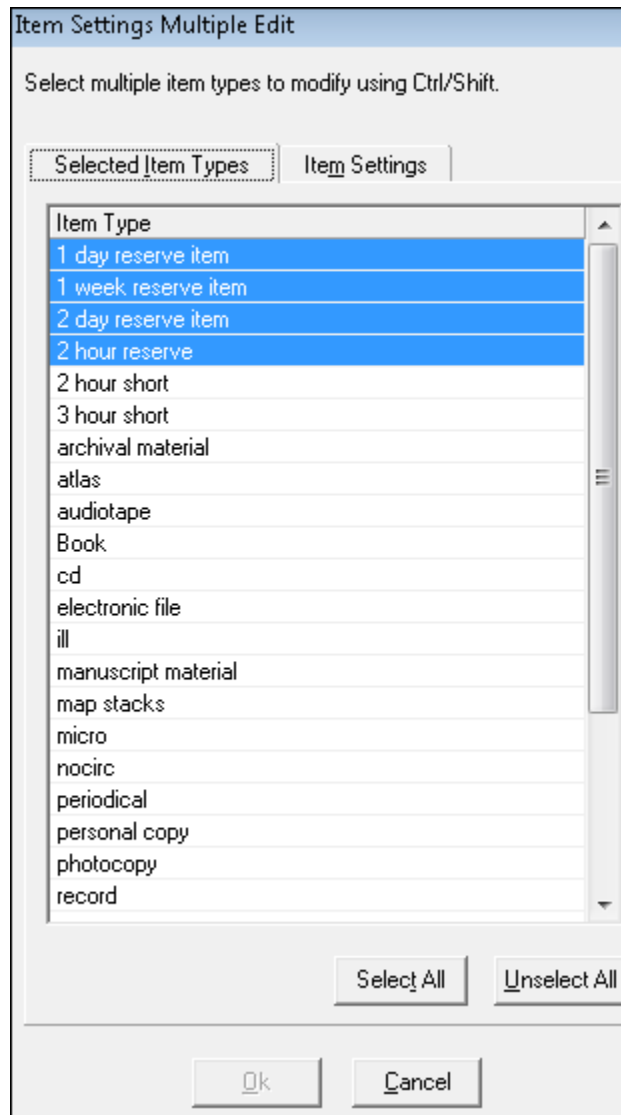


Figure 5-59. Selected Item Types Tab

4. Click **OK** to save your settings.

Matrix Tab and Circulation Policy Settings

The circulation policy matrix contains the specific patron group and item type combinations that govern a circulation transaction. Determine these values in the context of a patron in a specific patron group who wants to borrow an item of a specific item type from a location that belongs to the circulation policy group.

In order to perform transactions under the policy, at least, one matrix (all/all) is required.

Creating a circulation policy matrix involves the following:

- Specifying the policy settings for the specific patron group/item type combinations (see [Circulation Policy Matrix Record Settings - Settings Tab](#) on [page 5-95](#))
- Specifying the intervals for the specific patron group/item type combinations (see [Circulation Policy Matrix Record Settings - Intervals Tab](#) on [page 5-106](#))

Rules for Circulation Policy Matrix Definitions

The only matrix which circulation administrators are required to define is the default all/all matrix. In a circulation transaction, if there is no matrix for the specific patron group/item type combination defined, the system uses the (all)/(all) policy.

If all of the patron group/item type combinations at your site follow the same policies, administrators do not need to create additional matrixes. Create additional matrixes for patron group/item type combinations that are exceptions to the (all)/(all) settings.

If you want to prohibit circulation for a specific combination, you must create a matrix for that combination and leave the Charge/Renew check box unselected.

Loan Periods and Recalled Items

The loan period is altered by the system when a recall is placed on an item. The loan period is set to end on the date specified in the Min Loan Period for Recalled Items field in the circulation matrix. If this is later than the original due date for the item, the loan period remains that of the original charge. When this occurs, a recall notice is still sent. If a different fine rate is set for overdue/recalled materials, it goes into effect; and the overdue notices are for overdue and recall.

The loan period is also altered by the Fixed Due Date set in the Circulation - Calendars workspace. No due dates may be set to be later than the fixed due date. If the loan period for a charge is for a date later than the fixed due date, the period of the charge is set to the fixed due date. See [Circulation - Calendars Workspace](#) on [page 5-9](#).

Creating and Editing Matrix Options (Matrix Tab)

Creating and editing circulation policy definition matrixes is initiated from the Matrix tab of the Edit Policy Definition workspace for Circulation - Policy Definitions.

The Matrix tab, as shown in [Figure 5-60](#), lists the patron group/item type combinations.

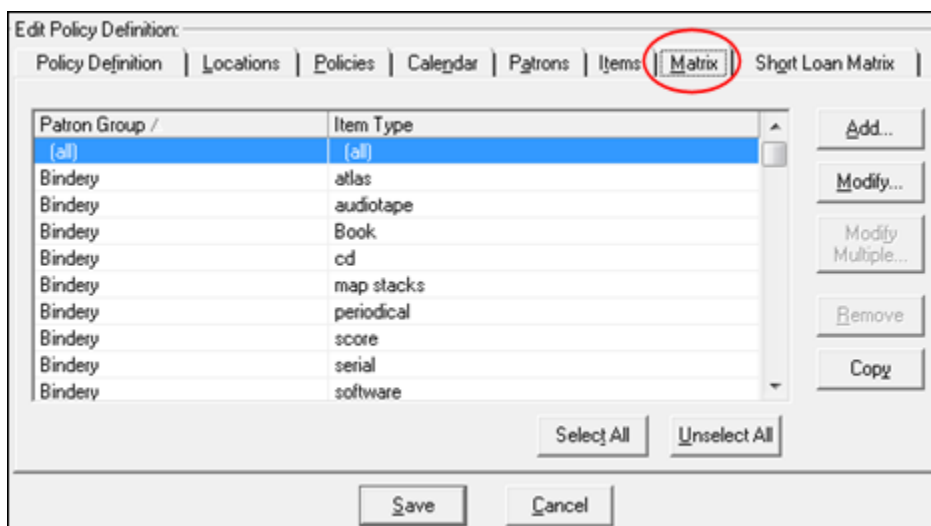


Figure 5-60. Matrix Tab

[Table 5-18](#) describes the buttons and fields on the Matrix tab.

Table 5-18. Matrix Tab

Name	Description
Patron Group	Identifies the name of the patron group to which the policy applies.
Item Type	Identifies the name of the item type to which the policy applies.
Add	Use this button to open the Add - Circulation Policy Matrix Record Settings dialog box, which is used to add a new matrix to the database (see Add - Circulation Policy Matrix Record Settings Dialog Box).
Modify	Use this button to open the Circulation Policy Matrix Record Settings dialog box, which is used to modify an existing matrix in the database (see Circulation Policy Matrix Record Settings - Settings Tab and Circulation Policy Matrix Record Settings - Intervals Tab). First, highlight/select the row/policy for which you want to make the change.

Table 5-18. Matrix Tab

Name	Description
Modify Multiple	Use this button to make the same change to several matrix policies at the same time. First, highlight/select the rows for which you want to make the change (using Shift+click or Ctrl+click to highlight individual rows or click Select All for all rows to be highlighted). Use Unselect All to clear your row selections. Using this button opens the Circulation Policy Matrix Record Settings Multiple Edit dialog box for you to make your change(s). Figure 5-61. Circulation Policy Matrix Record Settings Multiple Edit Dialog Box Select Modify? for the setting/row you want to change. Click the arrow next to the Settings tab on the Circulation Policy Matrix Record Settings Multiple Edit dialog box to display the Selected Matrixes tab which you can use to change your matrix policy row selections and continue making changes on the Settings and Intervals tabs for other policy matrixes. Only the fields selected will be modified. NOTE: The system checks for consistency among your selections. For example, if you select the loan period to be in Days, the renewal period also needs to be in days.

Table 5-18. Matrix Tab

Name	Description
Remove	Use this button to remove a policy from the list (after highlighting the row/matrix policy to be removed). NOTE: The (all)/(all) row is the default policy matrix and cannot be removed.
Copy	Use this button to open the Copy - Circulation Policy Matrix Record Settings dialog box, which is used to add a new matrix to the database from an existing matrix (see sections Copy - Circulation Policy Matrix Record Settings Dialog Box).
Select All	Use this button to highlight all the rows in the matrix policy list.
Unselect All	Use this button to clear any row selections that you have made.

Circulation Policy Matrix Record Settings - Settings Tab

The Circulation Policy Matrix Record Settings dialog box modifies the circulation transaction information for specific patron group/item type matrixes. The administrator can access this dialog box by highlighting a patron group/item type combination and then clicking the Modify button.

The Settings tab is shown in [Figure 5-62](#).

Circulation Policy Matrix Record Settings

Patron Group: Item Type:

Settings | Intervals

☒ Charge/Renew
 ☒ Recall
 ☒ Hold
 ☒ Call Slip
 ☒ UB

Loan Period:

Renewal Period:

Max # of Sequential Renewals:

Fine Interval:

Fine Rate:

Max Fine Amount:

Max Fine for Recalls:

Min Loan Period for Recalled Items: Days

Recall Fine Interval:

Recall Fine Rate:

Grace Period: Days

Recall Return Interval:

Recall Grace Period:

☒ Max Items Borrowed for this Patron Group & Item Type

Renew From: ☐ Original Due Date ☒ Renewal Date

Figure 5-62. Circulation Policy Matrix Record Settings dialog box, Settings Tab

[Table 5-19](#) describes the buttons and fields on the Settings tab of the Circulation Policy Matrix Record Settings dialog box.

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Patron Group column	The available Patron Groups are listed in this column.	Yes	These are the groups that were created in the Circulation - Patron Group workspace, see Patron Groups on page 5-38 .
Item Type column	The available Item Types are listed in this column.	Yes	These are the item types that were defined in the System Administration module, see Item Types on page 10-34 .

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Charge/Renew permission	When checked, this specific Patron Group-Item Type combination may borrow, that is charge and renew. If Charge/Renew is not selected, no other values need to be entered. NOTE: To allow UB patrons to charge/renew, check the UB permissions check box.	No	Check box Default is unchecked.
Recall permission	When checked, the patron may place a recall request for that item type.	No	Check box Default is unchecked.
Hold permission	When checked, the patron may place a hold request for that item type.	No	Check box Default is unchecked.
Call Slip permission	When checked, the patron may place a call slip request for that item type.	No	Check box Default is unchecked.
UB permission	When checked, remote patrons that are mapped into this group may place a UB request for items of this type. NOTE: The system displays this check box for UB and multi-clustered environments only. It does not become active until the Charge/Renew check box is checked.	No	Check box Default is unchecked.
Loan Period	Length of the loan.	No	0-999

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Loan period unit	Unit used to define and calculate the loan period.	No	Minute, Hour, and Day. Indef. (Indefinite) No due date is given. If Loan Interval is indef, renewal and regular fine values do not apply so you may leave those blank. Recall values, however, apply. Term. The system uses the End of term date set in the group's active Circulation calendar. See Circulation Calendars on page 5-8 .
Renewal period	Length of loan when the loan is renewed. Does not apply to indefinite loans.	No	0-999
Renewal period unit	If Loan Period is in days or minutes, Renewal Period must be the same. If Loan Period is in hours, Renewal Period may be hours or minutes (but if hours is selected, 24 is the maximum value). If Loan Period is Indefinite, the Renewal Period does not apply; leave it blank. If Loan Period is Term, Renewal Period is days or term. If the renewal period is term, then you do not need to enter a Renewal Period. Renewal period information is not applicable if Maximum Number of Sequential Renewals is 0.	No	Minute, Hour, and Day. Indefinite.

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Max[imum] # (Number) of Sequential Renewals	The number of times the patron can renew the item.	No	0-99 0 means no renewals are allowed.
Fine Interval	If Loan Period is days or minutes, Fine Interval must be the same. If Loan Interval is hours, Fine Interval may be hours or minutes. If Loan Interval is Indef, Fine Interval does not apply. If Loan Interval is Term, Fine Interval is days.	Yes	Minute, Hour, or Day.
Fine Rate or Demerits Rate if you use Demerits	The amount charged for each day/hour/minute (fine interval) that the item is overdue. The fine is applied to a patron's record when the overdue item is discharged. If the total amount of the fine exceeds the designated Maximum Fine Amount, the Maximum Fine Amount is applied instead.	No	0.00-999.99 Use 00.00 for any Patron Group/Item Type combination where you do not impose overdue fines.

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Max[imum] Fine Amount or Max[imum] Demerits	The maximum amount charged to the patron for any one overdue situation. Set to 0.00 if you do not limit the amount charged for an overdue item.  IMPORTANT: <i>Be aware that if you set this field to \$0.00 and you check the option for Include Max Fine Amount for Lost Item (see Table 5-14 on page 5-66), any accumulated overdue fines are reset to \$0.00 when an item is identified as lost.</i>	No	0.01-9999.99
Max[imum] Fine for Recalls or Max[imum] Recall Demerits	The maximum amount charged to the patron for any one overdue recall situation. Set to 0.00 if you do not limit the amount charged for a recalled overdue item.	No	0.01-9999.99

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Min[imum] Loan Period of Recalled Items	The minimum length of time that the patron may keep an item that has been recalled. This period is used when recalculating the due date for a recalled item. If Loan Period is in days, this period defaults to days. If Loan Period is in hours or minutes, this period defaults to hours or minutes. If Loan Period is <code>indef</code> or <code>term</code>, this period defaults to days.	No	0-999 If 0, the system assumes the recalled item is due back immediately and the due date is based on the recall return interval.
Recall Fine Interval	If Minimum Loan Period is days or minutes, Recall Fine Interval defaults to days or minutes. If Minimum Loan Period is hours, Recall Fine Interval may be hours or minutes. If Minimum Loan Period for Recalled Item is <code>indef</code> or <code>term</code>, Recall Fine Interval defaults to days.	No	Minute, Hour, or Day.

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Recall Fine Rate or Recall Demerits	The amount charged for each day/hour/minute (recall fine interval) that the recalled item is overdue. The fine is applied to a patron's record when the overdue recalled item is discharged. If the total amount of the fine exceeds the designated Maximum Recall Fine Amount, the Maximum Recall Fine Amount is applied instead.	No	00.00-999.99 Use 00.00 for any Patron Group/Item Type combination where you do not impose overdue recall fines.

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Grace Period	Defining a Grace Period means a patron may return an item late without incurring overdue fines provided the discharge date/time is before the end of the Loan or Renewal Period + the Grace Period. The system uses Grace Periods for this purpose only. If an item is discharged after the end of the Grace Period, the system does not take the Grace Period into account when calculating overdue fines. If Loan Period is days, hours, or minutes, the Grace Period defaults to the same interval. If Loan Period is Term, the Grace Period defaults to days. If Loan Period is Indef(inite) the Grace Period does not apply.	No	0-999 0 means no Grace Period applies.

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Recall Return Interval	The number of days, hours, or minutes added to the Minimum Loan Period for Recalled Items, in order to give the institution time to print and send the appropriate notices, as well as give the patron sufficient time to return the recalled item before it is considered overdue. This defaults to the same value (days, hours, minutes) as the minimum loan period for recalled items.	No	0-999

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Recall Grace Period	Defining a Recall Grace Period means a patron may return a recalled item late without incurring recall fines provided the discharge date/time is before the end of the Minimum Loan Period for Recalled Items + the Recall Grace Period. The system uses Recall Grace Periods for this purpose only. If an item is discharged after the end of the Recall Grace Period, the system does not take the Recall Grace Period into account when calculating recall overdue fines. If Minimum Loan Period for Recalled Items is days, hours, or minutes, the Recall Grace Period defaults to the same interval. If Minimum Loan Period for Recalled Items is indef or term, the Recall Grace Period defaults to days.		0-999 0 means no Recall Grace Period applies.
Renew From: Original Due Date Renewal Date	If the Original Due Date radio button is selected the item will be renewed from its original due date. If the Renewal Date radio button is selected the item will be renewed from the date that the renewal was placed. Does not apply if renewal is term.	Use the original due date to allow patrons the maximum loan time.	Radio button The default is Renewal Date.

Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab

Name	Description	Required	Type and Range
Max[imum] items Borrowed for this Patron Group & Item Type	When selected, a maximum number of items borrowed for a specific item type and patron group limit applies. NOTE: Available even if the policy group level setting is No limit. See Defining Circulation Blocks on page 6-1.	No	Check box If not selected there is no limit.
Max[imum] items Borrowed for this Patron Group & Item Type - limit number	Total number of items, of the specified item type and patron group, patrons of this group may borrow.	Yes, if the Max[imum] number of items borrowed check box is checked.	Numeric field. 1 - 9999

Circulation Policy Matrix Record Settings - Intervals Tab

The Intervals tab ([Figure 5-63](#)) defines the interval information for the patron group/item type selected. Each matrix has intervals defined for it.

Intervals are the amount of time that should elapse before certain events occur. For example, the lost interval defines how long an item is overdue before it is deemed a lost item.

Patron Group: Item Type:

Courtesy Notice Interval: days

Minimum Loan for Courtesy: days

First Overdue Interval: days

Lost Interval: days

Other (Overdue) Notice Interval: days

Other (Overdue) Notice Count:

Overdue Recall Notice Interval: days

Overdue Recall Notice Count:

Hold Shelf Life: Day

Figure 5-63. Circulation Policy Matrix Record Settings Dialog Box, Intervals Tab

[Table 5-20](#) describes the buttons and fields on the Intervals tab of the Circulation Policy Matrix Record Settings dialog box.

Table 5-20. Circulation Policy Matrix Record Settings - Intervals Tab

Name	Description	Required	Type and Range
Courtesy Notice Interval	The Courtesy Notice Interval is the number of days before an item is due when a courtesy notice can be produced, if you choose to send Courtesy Notices. A courtesy notice is sent only once unless the item has been renewed. Courtesy Notices are produced by running Circulation Batch Job 7.	Yes, if the Courtesy Notice Apply check box is checked in the Circulation Policy Definitions, Patron Rules dialog box. See Patrons Tab and Patron Rules Dialog Box on page 5-72.	0-999 The default is 0. This means a notice will not be sent regardless of the policy definition.
First Overdue Interval	The number of days after an item becomes overdue that pass before producing the first overdue notice. Overdue Notices are produced by running Circulation Batch job number two, circjob 2, (see the <i>Voyager Reporter User's Guide</i> for more information). When setting this be sure to consider the Grace Period for overdue fines set in the Patron Group-Item Type combination matrix (see Creating and Editing Matrix Options (Matrix Tab) on page 5-92) in order to determine the most appropriate time for the first overdue notice.	Yes, if the Overdue Notice Apply check box is checked in the Circulation Policy Definitions, Patron Rules dialog box. See Patrons Tab and Patron Rules Dialog Box on page 5-72.	0-999 The default is 0. If you enter 0, the first overdue notice will be produced when circjob 2 is run at any time after an item becomes overdue.
Other (Overdue) Notice Count	The number of subsequent overdue notices produced after the first notice.	Yes	0-999 The default is 0.
Overdue Recall Notice Count	The number of overdue recall notices to be sent.	Yes	0-999 The default is 0.

Table 5-20. Circulation Policy Matrix Record Settings - Intervals Tab

Name	Description	Required	Type and Range
Minimum Loan for Courtesy	The minimum loan for a courtesy equals the minimum loan length for an item to activate courtesy notices. If the difference between the charge date and the current date is greater than this minimum, the item is eligible for a notice.	Yes, if the Courtesy Notice Apply check box is checked in the Circulation Policy Definitions, Patron Rules dialog box. See Patrons Tab and Patron Rules Dialog Box on page 5-72.	0-999 The default is 0. If you enter 0, then all loans are eligible for a notice (except for indefinite loans). However, if the Courtesy Notice Interval is 0, then no notice is sent, regardless of the value in this field.
Lost Interval	The number of days after the due date/ time that pass before processing the item as lost. Processing the item as lost prevents any subsequent overdue notices from being produced, and applies the lost item processing fee to the patron's record, see Policies Tab on page 5-66. Items are marked as lost by running Circulation Batch job number two, Circjob 2, (see the <i>Voyager Reporter User's Guide</i> for more information).	Yes	0-999 The default is 0.

Table 5-20. Circulation Policy Matrix Record Settings - Intervals Tab

Name	Description	Required	Type and Range
Other (Overdue) Notice Interval	The number of days to pass before producing each subsequent overdue notice. Overdue Notices are produced by running Circulation Batch job number two, Circjob 2, (see the <i>Voyager Reporter User's Guide</i> for more information).	Yes	0-999 The default is 0. If you enter 0, subsequent overdue notices will be produced when circjob 2 is run at any time after the first overdue notice has been produced. If you want 24 hours between the production of Other (Overdue) Notices, you must enter 1.
Overdue Recall Notice Interval	The number of days after a recalled item becomes overdue that pass before producing an overdue notice. Overdue Recall Notices are produced by running Circulation Batch job number two, Circjob 2, (see the <i>Voyager Reporter User's Guide</i> for more information).	Yes	0-999 The default is 0. If you enter 0, an overdue recall notice will be produced when circjob 2 is run at any time after a recalled item becomes overdue.

Table 5-20. Circulation Policy Matrix Record Settings - Intervals Tab

Name	Description	Required	Type and Range
Hold Shelf Life	The number of days an item is kept on the hold shelf for a patron pickup. Running Circjob 6 expires the hold after this time elapses and creates a cancellation notice for all items that have expired or those that have been cancelled. Running Circjob 19 creates a report for all items that have expired or those that have been cancelled.	No	0-999 The default is 0.
Hold Shelf Life unit	The unit used to define and calculate the hold shelf life.	No	Minute, Hour and Day. The default is Day.

Add - Circulation Policy Matrix Record Settings Dialog Box

The **Add - Circulation Policy Matrix Record Settings** dialog box is the place where you define the circulation transaction information for specific Patron Group-Item Type matrices. This dialog box is accessed by highlighting a Patron Group-Item Type combination and clicking the **Add** button. This dialog box contains two tabs: the **Settings** tab and the **Intervals** tab.

The **Settings** tab is shown in [Figure 5-64](#), and the **Intervals** tab is shown in [Figure 5-65](#).

The dialog box is titled "Add - Circulation Policy Matrix Record Settings". It has two tabs: "Settings" (selected) and "Intervals".

Patron Group: (empty text field)

Item Type: (empty text field)

Patron Group List:

- (all)
- Courtesy Patron
- DMA Patron/auto mapped
- DMA Patron/manual map
- Faculty
- Graduate Student
- GWCC Patron/auto mapped
- GWCC Patron/manual map
- Inter-Library Loan
- RSCC Patron/auto mapped
- Staff
- UB Eligible/auto mapped
- UB Eligible/man mapped
- Undergraduate Student
- VC Patron/manual map
- voy20012
- voy2003 patron

Item Type List:

- (all)
- 1 day reserve item
- 1 week reserve item
- 2 day reserve item
- 2 hour reserve
- archival material
- atlas
- audiotape
- book
- cd
- electronic file
- manuscript material
- map stacks
- micro
- nocirc
- periodical
- personal copy
- photocopy
- record
- score
- serial
- software
- three dimensional object
- video

Settings Tab Options:

- ☐ Charge/Renew
- ☐ Recall
- ☐ Hold
- ☐ Call Slip
- ☐ UB

Loan Period: [0] [Day]

Renewal Period: [0] [Day]

Max # of Sequential Renewals: [0]

Fine Interval: [Day]

Fine Rate: [\$0.00]

Max Fine Amount: [\$0.00]

Max Fine for Recalls: [\$0.00]

Min Loan Period for Recalled Items: [0] Days

Recall Fine Interval: [Day]

Recall Fine Rate: [\$0.00]

Grace Period: [0] Days

Recall Return Interval: [0]

Recall Grace Period: [0]

☐ Max Items Borrowed for this Patron Group & Item Type

Renew From: ☐ Original Due Date ☐ Renewal Date

Buttons: [Save] [Cancel]

Figure 5-64. Add - Circulation Policy Matrix Record Settings dialog box, Settings Tab

Figure 5-65. Add - Circulation Policy Matrix Record Settings dialog box, Intervals Tab

[Table 5-21](#) describes the buttons and fields on the Add - Circulation Policy Matrix Record Settings dialog box.

Table 5-21. Add - Circulation Policy Matrix Record Settings Dialog Box

Name	Description	Required	Type and Range
Patron Group field	This field is left blank.	N/A	Display-Only
Item Type field	This field is left blank.	N/A	Display-Only
Patron Group column	The list of available patron groups. These groups are defined in the Circulation - Patron group workspace, see Patron Groups on page 5-38 .	Yes	List of patron groups
Item Type column	The list available item types. These types are defined in the System - Item Types workspace; see Patron Groups on page 5-38 .	Yes	List of item types

Table 5-21. Add - Circulation Policy Matrix Record Settings Dialog Box

Name	Description	Required	Type and Range
Settings	This tab defines the matrix settings. See Circulation Policy Matrix Record Settings - Settings Tab on page 5-95 .		Tab
Intervals	This tab defines the matrix intervals. See Circulation Policy Matrix Record Settings - Intervals Tab on page 5-106 .		Tab
Save	This button saves the matrix settings/ intervals to the database.		Button
Cancel	This button cancels the matrix changes without saving them to the database.		Button

NOTE:

The Patron Group - Item Type pairing must be unique per policy group.

Copy - Circulation Policy Matrix Record Settings Dialog Box

The Copy - Circulation Policy Matrix Record Settings dialog box is the place where you define the circulation transaction information for specific Patron Group-Item Type matrices by copying the settings of another matrix. This dialog box is accessed by highlighting a Patron Group-Item Type combination and clicking the Copy button. This dialog box contains two tabs: the Settings tab and the Intervals tab.

The Settings tab is shown in [Figure 5-66](#), and the Intervals tab is shown in [Figure 5-67](#).

Copy - Circulation Policy Matrix Record Settings

Patron Group: Faculty Item Type: Book

Patron Group	Item Type
(all)	(all)
Bindery	1 week reserve item
Carrel	archival material
Courtesy Patron	atlas
Faculty	audiotape
Graduate Student	Book
Inter-Library Loan	electronic file
Restricted	ill
Staff	manuscript material
Status Patron Group	map stacks
Undergraduate Student	micro
University Law Students	nocirc
URSA-NCIP	periodical
	personal copy
	photocopy
	score
	serial
	Serial: Prev Bound
	Serial:prev unbound
	software
	three dimensional object
	URSA-NCIP
	video

Settings Intervals

☒ Charge/Renew ☒ Recall ☒ Hold ☒ Call Slip
☒ UB Loan Period: 20 Days
 Renewal Period: 25 Days
 Max # of Sequential Renewals: 10
 Fine Interval: Day
 Fine Rate: \$0.50
 Max Fine Amount: \$5.00
 Max Fine for Recalls: \$10.00
 Min Loan Period for Recalled Items: 4 Days
 Recall Fine Interval: Day
 Recall Fine Rate: \$1.00
 Grace Period: 1 Days
 Recall Return Interval: 5
 Recall Grace Period: 3
☒ Max Items Borrowed for this Patron Group & Item Type: 5
 Renew From: ☐ Original Due Date ☒ Renewal Date

Save Cancel

Figure 5-66. Copy - Circulation Policy Matrix Record Settings dialog box, Settings Tab

Copy - Circulation Policy Matrix Record Settings

Patron Group: Faculty Item Type: Book

Settings Intervals

Courtesy Notice Interval: 2 days

Minimum Loan for Courtesy: 1 days

First Overdue Interval: 2 days

Lost Interval: 3 days

Other (Overdue) Notice Interval: 1 days

Other (Overdue) Notice Count: 1

Overdue Recall Notice Interval: 1 days

Overdue Recall Notice Count: 1

Hold Shelf Life: 5 days

Save Cancel

Figure 5-67. Copy - Circulation Policy Matrix Record Settings dialog box, Intervals Tab

[Table 5-22](#) describes the buttons and fields on the Copy - Circulation Policy Matrix Record Settings dialog box.

Table 5-22. Copy - Circulation Policy Matrix Record Settings Dialog Box

Name	Description	Required	Type and Range
Patron Group field	The name of the selected patron group.	N/A	Display-Only
Item Type field	The name of the selected item type.	N/A	Display-Only
Patron Group column	The list of available patron groups. These groups are defined in the Circulation - Patron group workspace, see Patron Groups on page 5-38 .	Yes	list of patron groups
Item Type column	The list of available item types. These types are defined in the System - Item Types workspace; see Patron Groups on page 5-38 .	Yes	list of item types

Table 5-22. Copy - Circulation Policy Matrix Record Settings Dialog Box

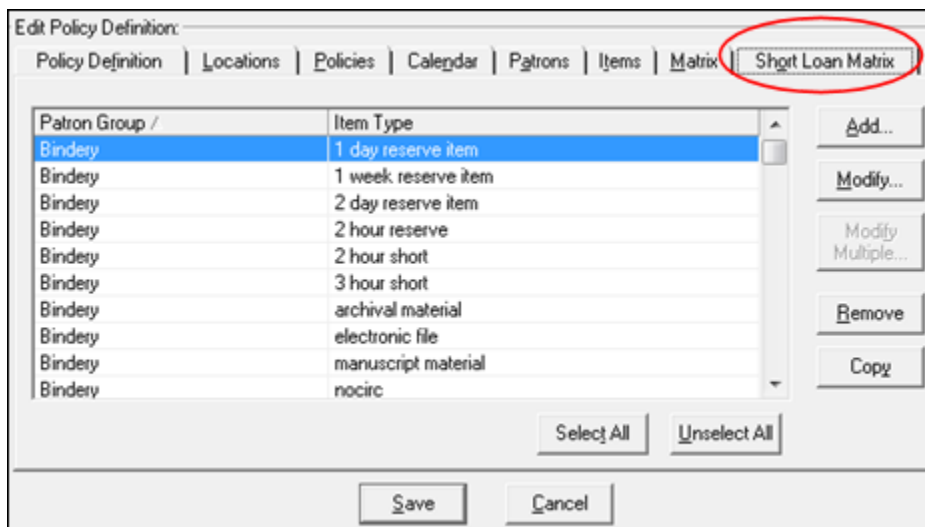
Name	Description	Required	Type and Range
Settings	This tab defines the matrix settings. See Circulation Policy Matrix Record Settings - Settings Tab on page 5-95 .		tab
Intervals	This tab defines the matrix intervals. See Circulation Policy Matrix Record Settings - Intervals Tab on page 5-106 .		tab
Save	This button saves the matrix settings/ intervals to the database.		button
Cancel	This button cancels the matrix changes without saving them to the database.		button

NOTE:

The Patron Group - Item Type pairing must be unique per policy group.

Short Loan Matrix Tab and Short Loan Policy Settings

The circulation short loan policy matrix contains the specific patron group/item type combinations that govern circulation transactions for short-loan items only. These are managed from the Short Loan Matrix tab. This tab displays all the short loan policies that have been created (see [Figure 5-68](#)).

**Figure 5-68. Short Loan Matrix Tab**

See [Table 5-23](#) for a description of the components on the Short Loan Matrix tab.

Table 5-23. Short Loan Matrix Tab

Name	Description
Patron Group	Identifies the name of the patron group for the policy.
Item Type	Identifies the name of the item type for the policy.
Add	Use this button to create a new policy. This opens the Add - Circulation Policy Matrix Record Settings dialog box.
Modify	Use this button to edit the policy/row that you selected/highlighted. Using this button opens the Circulation Policy Matrix Record Settings dialog box that displays the Settings and Intervals tabs.

Table 5-23. Short Loan Matrix Tab

Name	Description
Modify Multiple	Use this button to make the same change to several short loan matrix policies at the same time. First, highlight/select the rows for which you want to make the change (using Shift+click or Ctrl+click to highlight individual rows or click Select All for all rows to be highlighted). Use Unselect All to clear your row selections. Using this button opens the Circulation Policy Matrix Record Settings Multiple Edit dialog box for short loans for you to make your change(s).
Remove	Use this button to remove the policy that you selected/highlighted in the list.

Figure 5-69. Circulation Policy Matrix Record Settings Multiple Edit Dialog Box

Select Modify? for the setting/row you want to change.

Click the arrow next to the Short Loan Settings tab on the Circulation Policy Matrix Record Settings Multiple Edit dialog box to display the Selected Matrixes tab which you can use to change your matrix policy row selections and continue making changes on the Short Loan Settings and Intervals tabs for other policy matrixes.

Table 5-23. Short Loan Matrix Tab

Name	Description
Copy	Use this button to copy the policy that you selected/highlighted in the list.
Select All	Use this button to highlight all the rows in the short loan matrix policy list.
Unselect All	Use this button to clear any row selections that you have made.

Creating a circulation short loan policy matrix involves the following:

- Setting the policies for the specific patron-group and item-type combination
- Setting the intervals for the specific patron-group and item-type combination

To access the Add - Circulation Policy Matrix Record Settings dialog box for short loans, click the Add button from the Short Loan Matrix tab. See [Figure 5-70](#).

Add - Circulation Policy Matrix Record Settings

Patron Group: Item Type:

Patron Group	Item Type
Bindery	1 day reserve ite
Carrel	2 hour reserve
Courtesy Patron	2 hour short
Faculty	3 hour short
Graduate Studer	cd
Inter-Library Loan	record
QAMK Cluster 2	
Restricted	
Staff	
UB borrowing pe	
UBCluster1 enat	
Undergraduate 9	
University Law S	

Short Loan Settings | Intervals

☐ Charge/Renew

☐ Allow Bookings on Overdue Items

☐ Always Calculate Due Date/Time to be Next Fixed Due Time

Loan Period:

Renewal Period:

Max # of Sequential Renewals:

Fine Interval:

Demerits Hours

Max Demerits

Grace Period:

Advanced Loan Warning Period:

Renew From: ☐ Original Due Date ☐ Renewal Date

Figure 5-70. Add - Circulation Policy Matrix Record Settings (Short Loans) dialog box

Highlight a row from each of the Patron Group and Item Type columns and specify the settings on the Short Loan Settings and Intervals tabs.

See [Table 5-24](#) for a description of the components on the Add - Circulation Policy Matrix Record Settings dialog box and Short Loan Settings tab.

See [Table 5-25](#) for a description of the components on the Intervals tab. Intervals are the amount of time that should elapse before certain events occur.

NOTE:

If there is no specific short loan matrix for a particular patron group/item type, the (all)/(all) settings on the regular Matrix tab are used. Holds, recalls, and call slips for short loans are not allowed.

Table 5-24. Add - Circulation Policy Matrix Record Settings and Short Loan Settings Tab

Component	Description	Required	Type and Range
Patron Group column	The available patron groups are listed in this column. These are the groups that were created in the in the Circulation - Patron Group workspace, see Patron Groups on page 5-38 .	Yes	
Item Type column	The available item types are listed in this column. These item types are defined in Voyager System Administration.	Yes	
Charge/Renew	When checked, this specific patron-group and item-type combination may borrow (has permission) to charge and renew. If Charge/Renew is not selected, no other values need to be entered. By default, this option is not selected.	No	Check box.
Allow Bookings on Overdue Items	Use this option to specify that patrons may book overdue items. When the check box is selected, bookings on overdue items are permitted. This may be selected for each patron-group/item-type pair defined.	No	Check box.

Table 5-24. Add - Circulation Policy Matrix Record Settings and Short Loan Settings Tab

Component	Description	Required	Type and Range
Always Calculate Due Date/Time to be Next Fixed DueTime	Use this option to permit an override to the short loan calculation. This override specifies that the first booking of the day uses the normal calculation method for due date/time and then bumps it to the fixed due time for overnight loans of the next open day beyond the calculated date/time. For example, the following options are initially presented for a one-hour short loan in a given day: 7am - <next open day/time> 8am - <next open day/time> 9am - <next open day/time> 10am - <next open day/time> 11am - <next open day/time> 12pm - <next open day/time> 1pm - <next open day/time> 2pm - <next open day/time> 3pm - <next open day/time> 4pm - <next open day/time> 5pm - <next open day/time> (where <next open day/time> may, for example, display as 9am 07-Jan) After someone books the item for 11am, the following availability options display: 7am - 8am 8am - 9am 9am - 10am 10am - 11am See the Hours Tab section starting on page 5-10 for more information regarding how loan periods are calculated for short loans.	No	Check box.

Table 5-24. Add - Circulation Policy Matrix Record Settings and Short Loan Settings Tab

Component	Description	Required	Type and Range
Loan Period	Length of the loan. Use the numeric field to specify an amount and the unit field to specify the type (Minute or Hour).	No	Numeric. 1-999 for minutes. 1-24 for hours.
Renewal Period	Length of loan when the loan is renewed. Use the numeric field to specify an amount and the unit field to specify the type (Minute or Hour). If Loan Period is in minutes, the Renewal Period must be the same. If Loan Period is in hours, Renewal Period may be hours or minutes. Renewal period information is not applicable if Maximum Number of Sequential Renewals is 0.	No	Numeric. 1-999 for minutes. 1-24 for hours.
Max[imum] # (Number) of Sequential Renewals	The number of times the patron can renew the item.	No	0-99. 0 means no renewals are allowed.
Fine Interval	If the Loan Period is days or minutes, the Fine Interval must be the same. If the Loan Interval is hours, the Fine Interval may be hours or minutes.	Yes	Minute, Hour.
Fine Rate (or Demerits Rate if Demerits is used)	The amount charged for each hour/minute (fine interval) that the item is overdue. The fine is applied to a patron's record when the overdue item is discharged. If the total amount of the fine exceeds the designated Maximum Fine Amount, the Maximum Fine Amount is applied instead. NOTE: Use 00.00 for any Patron Group/Item Type combination where you do not impose overdue fines.	No	0.00-999.99

Table 5-24. Add - Circulation Policy Matrix Record Settings and Short Loan Settings Tab

Component	Description	Required	Type and Range
Max[imum] Fine Amount (or Max[imum] Demerits)	The maximum amount charged to the patron for any one overdue situation. Leave blank if you do not limit the amount charged for an overdue item.	No	0.01-9999.99
Grace Period	Defining a Grace Period means a patron may return an item late without incurring overdue fines provided the discharge date/time is before the end of the Loan or Renewal Period plus the Grace Period. The system uses Grace Periods for this purpose only.  IMPORTANT: <i>If an item is discharged after the end of the Grace Period, the system does not take the Grace Period into account when calculating overdue fines.</i> If the Loan Period is hours or minutes, the Grace Period defaults to the same interval. If the Loan Period is Term, the Grace Period defaults to days. NOTE: Use 0 to indicated that no Grace Period applies.	No	0-999

Table 5-24. Add - Circulation Policy Matrix Record Settings and Short Loan Settings Tab

Component	Description	Required	Type and Range
Advanced Loan Warning Period	Use this option to specify the interval within which the circulation clerk is alerted to future bookings when an item is being discharged. The timeframe within which the circulation clerk is notified (warned) is calculated by adding the time value specified in this option to the current time (that is, the time of the discharge). NOTE: The Short Loan Advanced Booking Alert session preference in the Circulation client must also be selected for a warning message to display to the circulation clerk. Refer to the <i>Voyager Circulation User's Guide</i> for more information.	No	Numeric. 1-999 for minutes. 1-24 for hours.
Renew From: Original Due Date Renewal Date	If the Original Due Date radio button is selected, the item will be renewed from its original due date. If the Renewal Date radio button is selected, the item will be renewed from the date that the renewal was placed.	Use the original due date to allow patrons the maximum loan time.	Radio button The default is Renewal Date.

NOTE:

If you are assessing Demerit points instead of using monetary fines, the rates and amounts in the fields correspond to the number of points assessed.

Table 5-25. Intervals Tab

Name	Description	Required	Type and Range
Courtesy Notice Interval	The Courtesy Notice Interval is the number of days before an item is due when a courtesy notice can be produced, if you choose to send Courtesy Notices. Sending out courtesy notices for short loaned items would generally be impractical.	Yes, if the Courtesy Notice Apply check box is checked in the Circulation Policy Definitions, Patron Rules dialog box. See Patrons Tab and Patron Rules Dialog Box on page 5-72.	0-999 Default is 0. This means a notice will not be sent regardless of the policy definition.
Minimum Loan for Courtesy	The minimum loan for a courtesy equals the minimum loan length for an item to activate courtesy notices. If the difference between the charge date and the current date is greater than this minimum, the item is eligible for a notice. If you choose not to send out courtesy notices, make sure that the Minimum Loan for Courtesy field is set to a value higher than your longest short loan period.	Yes, if the Courtesy Notice Apply check box is checked in the Circulation Policy Definitions, Patron Rules dialog box. See Patrons Tab and Patron Rules Dialog Box on page 5-72.	0-999 The default is 0. If you enter 0, then all loans are eligible for a notice. However, if the Courtesy Notice Interval is 0, then no notice is sent, regardless of the value in this field.

Table 5-25. Intervals Tab

Name	Description	Required	Type and Range
First Overdue Interval	The number of days after an item becomes overdue that pass before producing the first overdue notice. Overdue Notices are produced by running Circulation Batch job number two, circjob 2, (see the <i>Voyager Reporter User's Guide</i> for more information). When setting this be sure to consider the Grace Period for overdue fines set in the Patron Group-Item Type combination matrix (see Creating and Editing Matrix Options (Matrix Tab) on page 5-92) in order to determine the most appropriate time for the first overdue notice.	Yes, if the Overdue Notice Apply check box is checked in the Circulation Policy Definitions, Patron Rules dialog box. See Patrons Tab and Patron Rules Dialog Box on page 5-72.	0-999 The default is 0. If you enter 0, the first overdue notice will be produced when circjob 2 is run at any time after an item becomes overdue.
Lost Interval	The number of days after the due date/ time that pass before processing the item as lost. Processing the item as lost prevents any subsequent overdue notices from being produced, and applies the lost item processing fee to the patron's record, see Policies Tab on page 5-66. Items are marked as lost by running Circulation Batch job number two, Circjob 2, (see the <i>Voyager Reporter User's Guide</i> for more information).	Yes	0-999 The default is 0.

Table 5-25. Intervals Tab

Name	Description	Required	Type and Range
Other (Overdue) Notice Interval	The number of days to pass before producing each subsequent overdue notice. Overdue Notices are produced by running Circulation Batch job number two, Circjob 2, (see the <i>Voyager Reporter User's Guide</i> for more information).	Yes	0-999 The default is 0 If you enter 0, subsequent overdue notices will be produced when circjob 2 is run at any time after the first overdue notice has been produced. If you want 24 hours between the production of Other (Overdue) Notices, you must enter 1.
Other (Overdue) Notice Count	The number of subsequent overdue notices produced after the first notice.	Yes	0-999 The default is 0.

Creating Circulation Policy Groups

[Procedure 5-12, Creating a Circulation Policy Group - Policy Definition Tab](#), on page [5-131](#) through [Procedure 5-20, Creating a Circulation Policy Group - Short Loan Matrix Tab](#), on page [5-148](#) provide instructions on completing each tab of the **Circulation - Policy Definitions** workspace (see [Figure 5-71](#)).

Circulation - Policy Definitions

Names

- Main Circ Group
- Media Scheduling Group
- OL Circ
- Other Branch Circ Grp
- Reserve Circ Group

New Edit Delete

New Policy Definition:

Policy Definition Locations Policies Calendar Patrons Items

Circ Group Name:

Save Cancel

Figure 5-71. Circulation - Policy Definitions Workspace

NOTE:

The **Save** button found on each tab of the **Circulation - Policy Definitions** workspace is not active until a Policy Definition name and a Location is associated with it. Once saved the **Matrix** and **Short Loan Matrix** tabs are visible.

Once the **Save** button is active, clicking it will save the Circulation Policy Definition and return the user to the **Circulation - Policy Definitions** workspace with the newly-defined policy definition listed.

Also, after the policy definition has been saved, operators use the **Edit** button to access the **Circulation - Policy Definitions** workspace tabs. The bottom half of the **Circulation - Policy Definitions** workspace is entitled **Edit Policy Definition**, instead of entitled **New Policy Definition** (see [Figure 5-72](#)).

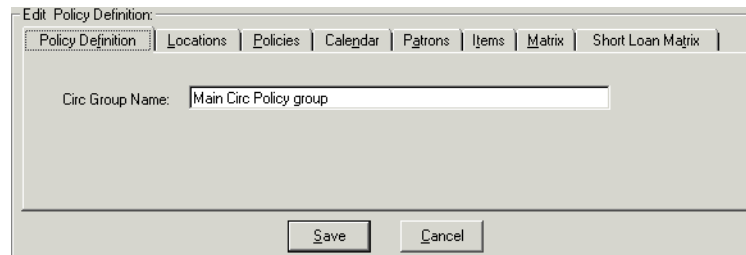


Figure 5-72. Edit Policy Definition section of the Circulation - Policy Definition Workspace



Procedure 5-12. Creating a Circulation Policy Group - Policy Definition Tab

Use the following to define the name of a Circulation Policy Group.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. Click the **New** button.

Result: The bottom half of the **Circulation - Policy Definitions** workspace opens to the **New Policy Definition** section, with the **Policy Definition** tab available (see [Figure 5-73](#)).

Circulation - Policy Definitions

Names

- Main Circ Group
- Media Scheduling Group
- OL Circ
- Other Branch Circ Grp
- Reserve Circ Group

New Edit Delete

New Policy Definition:

Policy Definition Locations Policies Calendar Patrons Items

Circ Group Name:

Save Cancel

Figure 5-73. Policy Definition Tab

3. Enter the name of the Circulation Policy Group in the **Circ Group Name** field (see [Figure 5-74](#)).

New Policy Definition:

Policy Definition Locations Policies Calendar Patrons Items Matrix Short Loan Matrix

Circ Group Name:

Save Cancel

Figure 5-74. Policy Definition Tab with Circulation Policy Group named

4. Click on the **Locations** tab to continue to define this Circulation Policy Group (see [Procedure 5-13, Creating a Circulation Policy Group - Locations Tab](#), on page [5-133](#)).



Procedure 5-13. Creating a Circulation Policy Group - Locations Tab

Use the following to define the Locations for a Circulation Policy Group.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. After naming the Circulation Policy Group, click the **Locations** tab, and highlight any locations in the **Available** box that you want to add to this Circulation Policy Group (see [Figure 5-75](#)).

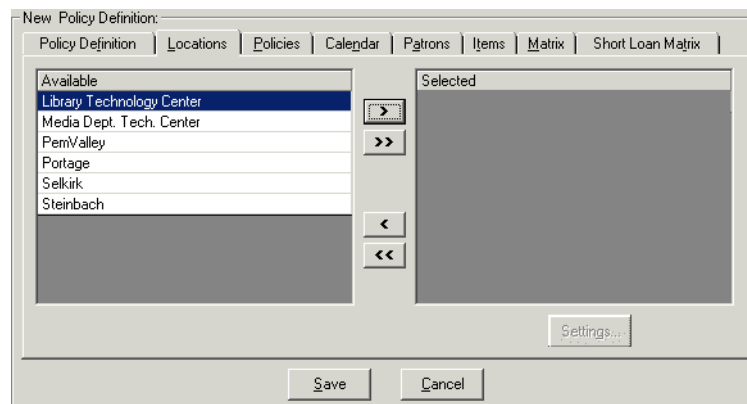


Figure 5-75. Locations Tab with available locations

3. Click the single right arrow **>** button to move the location from the **Available** list to the **Selected** list. The **>>** button moves all locations to the **Selected** list. The **<** button moves a location from the **Selected** list to the **Available** list. The **<<** button moves all locations from the **Selected** list to the **Available** list.

4. Save this newly-created Circulation Policy definition by clicking the **Save** button. Then highlight it, click the **Edit** button, click the **Locations** tab, and you can now set up the circulation happening locations. Notice that the **Settings...** button is now active.
5. For selected locations that you want to make circulation happening locations,
 - a. Highlight the location.
 - b. Click the **Settings...** button. The **Locations Settings** dialog box opens (see [Figure 5-76](#))

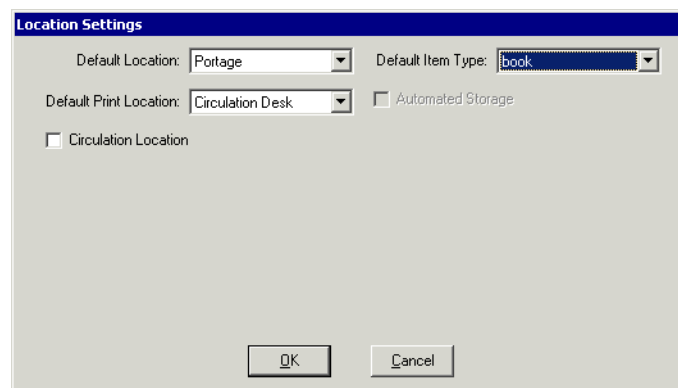
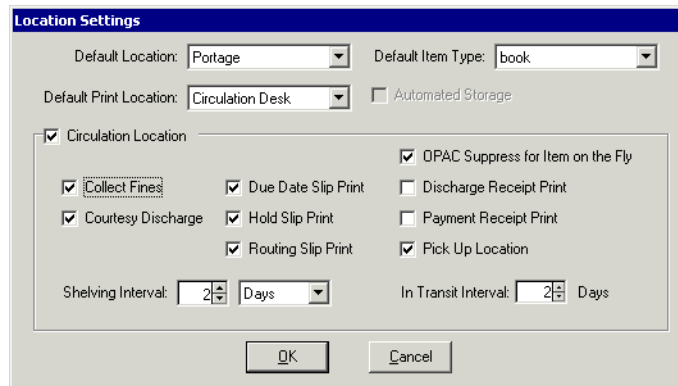


Figure 5-76. Locations Settings dialog box

- c. Click the **Circulation Location** check box. The bottom half of the **Locations Settings** dialog box opens.
- d. Click the check boxes to enable wanted features (see [Figure 5-77](#)).



The **Location Settings** dialog box is shown with the following configuration:

- Default Location:** Portage
- Default Item Type:** book
- Default Print Location:** Circulation Desk
- Automated Storage:** ☐
- Circulation Location:** ☒
 - ☒ Collect Fines
 - ☒ Due Date Slip Print
 - ☒ OPAC Suppress for Item on the Fly
 - ☒ Discharge Receipt Print
 - ☒ Courtesy Discharge
 - ☒ Hold Slip Print
 - ☐ Payment Receipt Print
 - ☒ Routing Slip Print
 - ☒ Pick Up Location
- Shelving Interval:** 2 Days
- In Transit Interval:** 2 Days

Buttons: OK, Cancel

Figure 5-77. Locations Settings dialog box with Circulation happening location defined

Result: The location selected is now a circulation happening location.

- Click on the **Policies** tab to continue to define this Circulation Policy Group (see [Procedure 5-15, Creating a Circulation Policy Group - Policies Tab](#), on page 5-138).



Procedure 5-14. Configuring Circulation Alerts

Use the following to configure circulation alerts.

- Access the **Circulation - Policy Definitions** workspace.
 - Click **Circulation** in the listbar.
 - Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

- Select the circulation happening location for which you want to configure circulation alerts and click the **Settings** button.

Result: The **Location Settings** dialog box opens.

- Click the **Alerts** tab.

Result: The **Alerts** tab opens (see [Figure 5-78](#)).

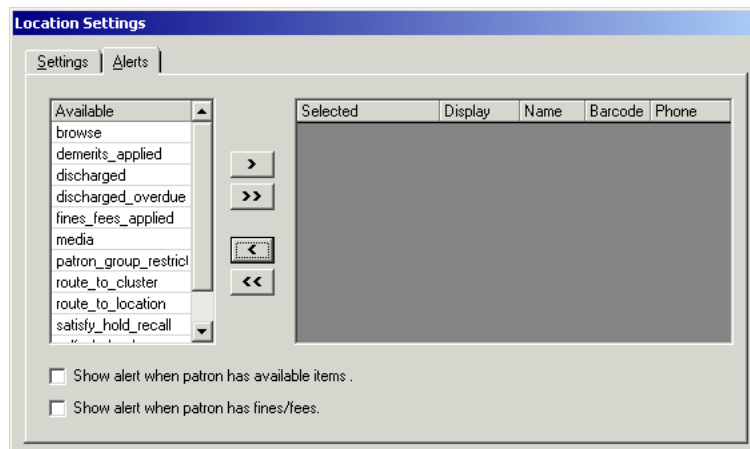


Figure 5-78. Alerts Tab

4. Select the conditions for which you want to provide a circulation alert from the **Available** list and click the **>** button.

NOTE:

Use the **>>** button to select all of the available conditions.

Result: The wanted conditions are moved into the **Selected** list.

5. For each condition, determine the display method, **FYI** or **Dialog**, from the **Display** drop-down menu (see [Figure 5-79](#)).

Location Settings

Settings Alerts

Available: demerits_applied, media, fines_fees_applied

Selected:

Selected	Display	Name	Barcode	Phone
browse	Dialog	☐	☐	☐
discharged	Dialog	☐	☐	☐
discharged_overdue	Dialog	☐	☐	☐
fines_fees_applied	Dialog	☐	☐	☐
patron_group_restrict	Dialog	☐	☐	☐
route_to_cluster	FYI	☐	☐	☐
route_to_location	Dialog	☐	☐	☐
satisfy_hold_recall	Dialog	☐	☐	☐
self_shelved	Dialog	☐	☐	☐
to_hold_shelf	Dialog	☐	☐	☐

☐ Show alert when patron has available items.

☐ Show alert when patron has fines/fees.

Figure 5-79. Display method drop-down menu

Result: The method of the alert is defined for the selected condition.

OPTIONAL:

- If `to_hold_shelf` was selected, define the patron-specific information you want to display by selecting the **Name**, **Barcode**, and/or **Phone** check boxes (see [Figure 5-80](#)).

Location Settings

Settings Alerts

Available: demerits_applied, discharged, fines_fees_applied, patron_group_restrict, satisfy_hold_recall, self_shelved, to_hold_shelf

Selected:

Selected	Display	Name	Barcode	Phone
browse	FYI	☐	☐	☐
discharged_overdue	FYI	☐	☐	☐
media	Dialog	☐	☐	☐
route_to_cluster	Dialog	☐	☐	☐
route_to_location	Dialog	☐	☐	☐
to_hold_shelf	Dialog	☒	☒	☒
fines_fees_applied	Dialog	☐	☐	☐

☒ Show alert when patron has available items.

☒ Show alert when patron has fines/fees.

Figure 5-80. Defining patron information to display

Result: The patron information is defined.

7. If you want to configure alerts at charge and discharge for available items and outstanding fines, select the **Show alert when patron has available items** check box and/or the **Show alert when patron has fines/fees** check boxes.
8. When finished, click the **OK** button. Click the **Cancel** button if you do not want to configure these alerts.

Result: The system returns to the **Locations** tab (see [Figure 5-81](#)).

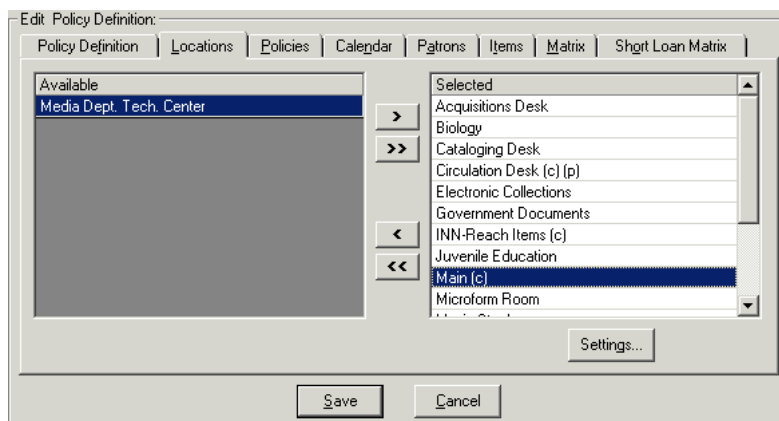


Figure 5-81. Locations Tab

9. Click the **Save** button to save the newly-configured alerts or click the **Cancel** button if you do not want to keep the alerts.

Result: If saved, the circulation alerts are configured for the selected circulation happening location.



Procedure 5-15. Creating a Circulation Policy Group - Policies Tab

Use the following to define the Policies for a Circulation Policy Group.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. After naming the Circulation Policy Group and associating the locations, click the **Policies** tab to set up policies your site needs
 - a. Click the check box to enable wanted features.
 - b. Enter numbers in the wanted fields.

Result: The policies for that Circulation Policy Group are applied (see [Figure 5-82](#)).

New Policy Definition:

Policy Definition | Locations | **Policies** | Calendar | Patrons | Items

☒ Include Lost Item Processing Fee Lost Item Processing Fee: \$0.00

☒ Count Closed Days/Hours/Minutes For Loan ☐ Count Closed Days/Hours/Minutes For Fine

☒ Apply Fixed Due Time For Overnight Loans

☒ Include Max Fine Amount For Lost Item

☒ Renew If Overdue ☒ Renew If Recall ☒ Renew if Hold

Short Loan Early Pickup Window: 0 Minutes ☐ Extend Recall Due Date

Short Loan Unclaimed Interval: 0 Minutes

Save Cancel

Figure 5-82. Policies Tab with features enabled

3. Click on the **Calendars** tab to continue to define this Circulation Policy Group (see [Procedure 5-16](#), [Creating a Circulation Policy Group - Calendars Tab](#), on page [5-139](#)).



Procedure 5-16. Creating a Circulation Policy Group - Calendars Tab

Use the following to define the Calendars for a Circulation Policy Group.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. After naming the Circulation Policy Group, associating the locations, and defining policies, click the **Calendar** tab, highlight any calendar in the **Available** box that you want to add to this Circulation Policy Group.
 3. Click the single right arrow > button to move the location from the **Available** list to the **Selected** list (see [Figure 5-83](#)).
-

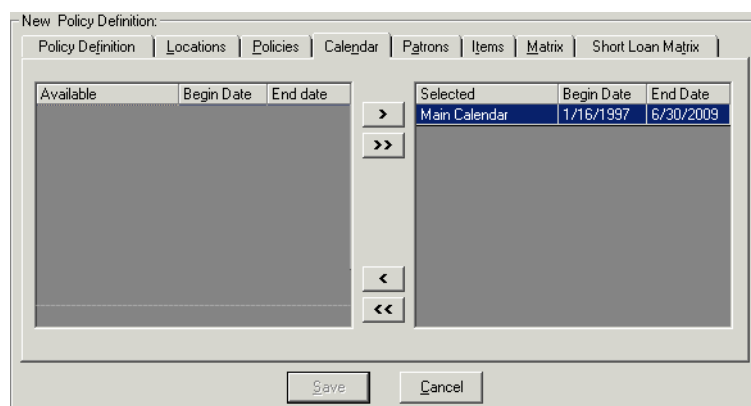


Figure 5-83. Calendar Tab with a calendar selected

4. Click on the **Patrons** tab to continue to define this Circulation Policy Group (see [Procedure 5-17, Creating a Circulation Policy Group - Patrons Tab](#), on page [5-140](#)).
-



Procedure 5-17. Creating a Circulation Policy Group - Patrons Tab

Use the following to define the Patrons associated with the Circulation Policy Group.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. After naming the Circulation Policy Group, associating the locations, and defining policies, and associating calendars, click the **Patrons** tab.

Result: A list of Patron Groups not associated with any other Circulation Policy Group displays (see [Figure 5-84](#)).

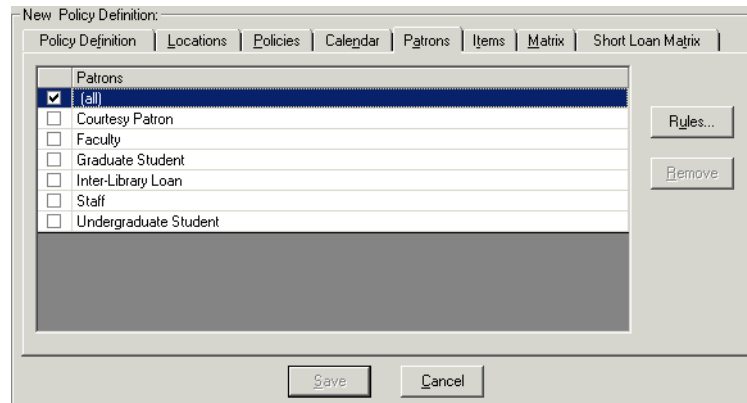


Figure 5-84. Patrons Tab with list of Patron Groups

3. Highlight the Patron Group in the list for which you want to define the settings, and Click the **Rules...** button, begin with the default all setting.

Result: The **Patron Rules** dialog box opens (see [Figure 5-85](#)).

The screenshot shows the 'Patron Rules' dialog box. It contains several sections of settings:

- Top Section:**
 - ☒ Fines/Lost Item Fees Apply. Max Outstanding Balance: \$50.00. Min Balance For Notice: \$10.00.
 - ☐ Courtesy Notice Apply.
 - ☒ Overdue Notice Apply.
- Max Items Borrowed in this Policy Group:** 20.
- Max Overdue Recalled Items Apply:** 2.
- Max Number Of Recalls Apply:** 5.
- Max Self-Shelf Returns Apply:** 2.
- Max Claimed Returns Apply:** 2.
- Max Lost Items Apply:** 3.
- Max Call Slip Requests Apply:** 3.
- Max Short Loan Apply:** 2.
- Max Short Loan Titles Apply:** 2.
- Max Short Loan Per Day Apply:** 1.
- Max Overdue Items Apply:** 3.

Below these are three sections of checkboxes:

- ☒ Place Holds Using The OPAC.
- ☒ Place Recalls Using The OPAC.
- ☒ Place Short Loans Using The OPAC.
- ☒ Place Call Slip Requests Using The OPAC.
- ☐ Email Courtesy Notices.
- ☒ Email Cancellation Notices.
- ☒ Email Item Available Notices.
- ☒ Email Overdue Notices.
- ☒ Email (Other) Overdue Notices.
- ☒ Email Recall Notices.
- ☒ Email (Other) Recall Notices.

At the bottom are 'OK' and 'Cancel' buttons.

Figure 5-85. Patron Rules dialog box with features enabled

4. Apply the rules for the Patron Group.
 - a. Click the check box to enable wanted features.
 - b. Enter numbers in the corresponding fields for that feature.
 - c. Enter the Max Outstanding Balance and the Min Balance for Notice if wanted.
 - d. Click the **OK** button.

Result: The settings for the Patron Group you had selected are applied (see [Figure 5-86](#)).

Repeat this for any Patron Group that you want to use settings other than the (all) settings.

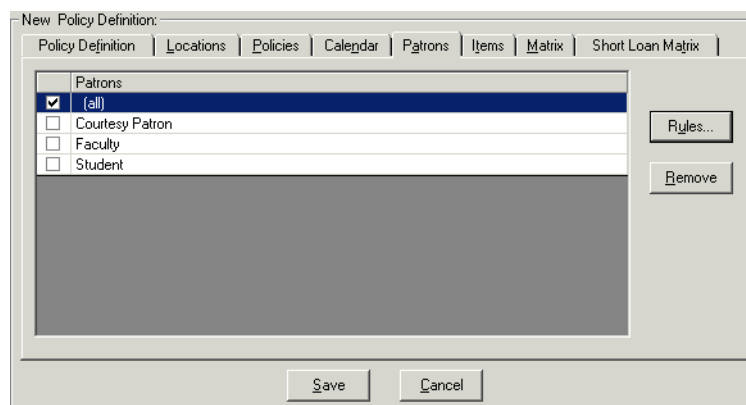


Figure 5-86. Patrons Tab with list of Patron Groups

NOTE:

The check in the check box next to the name of the Patron Group in [Figure 5-86](#) means that the rules for those groups are different from the (all) rules.

5. Click on the **Items** tab to continue to define this Circulation Policy Group (see [Procedure 5-18, Creating a Circulation Policy Group - Items Tab](#), on page [5-143](#)).



Procedure 5-18. Creating a Circulation Policy Group - Items Tab

Use the following to define the Items associated with the Circulation Policy Group.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. After naming the Circulation Policy Group, associating the locations, and defining policies, associating calendars and patrons, click the **Items** tab.

Result: The list of Item Types displays (see [Figure 5-87](#)).

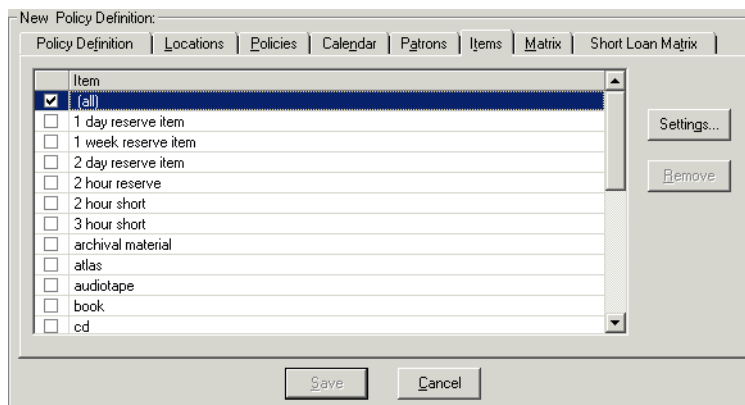


Figure 5-87. Items Tab displaying list of Item Types

3. Highlight the Item Type in the list for which you want to define the settings, and click the **Settings...** button.

Result: The **Item Settings** dialog box opens (see [Figure 5-88](#)).

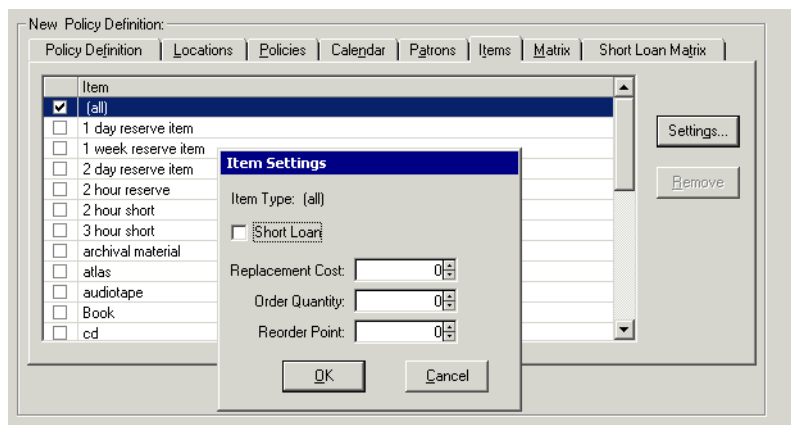


Figure 5-88. Items Settings dialog box

4. Enter the settings you want for the Item Types you select, begin with the default all setting.

- a. Check the **Short Loan** check box if this item type may only be used for short loans.
- b. Enter numbers in the fields you want to apply.
- c. Click the **OK** button.

Result: The settings for the Item Types you had selected are applied.

NOTE:

A check in the check box next to the name of the Item Type means that the settings for those item types are different from the (all) settings.

5. Click on the **Matrix** tab to continue to define this Circulation Policy Group (see [Procedure 5-19, Creating a Circulation Policy Group - Matrix Tab](#), on page 5-145).



Procedure 5-19. Creating a Circulation Policy Group - Matrix Tab

Use the following to create a Circulation Policy Matrix. This includes the information defined on the **Matrix** tab, which governs the loan for a specific Patron Group-Item Type combination, and the **Intervals** tab, which defines the various interval periods/count for that specific Patron Group-Item Type combination.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. After naming the Circulation Policy Group, associating the locations, and defining policies, associating calendars, patrons and items, click the **Matrix** tab.

Result: The **Add - Circulation Policy Matrix Record Settings** dialog box opens.

3. Select the Patron Group and Item Type matrix whose settings you want to define, starting with the (all)/(all) group as these default values must be defined.
 - a. Check the appropriate check boxes.
 - b. Enter numbers in the fields to provide the loan information (see [Figure 5-89](#)).

Add - Circulation Policy Matrix Record Settings

Patron Group: Item Type:

Patron Group	Item Type
(all)	(all)
Courtesy Patron	1 day reserve item
DMA Patron/auto mapped	1 week reserve item
DMA Patron/manual map	2 day reserve item
Faculty	2 hour reserve
Graduate Student	archival material
GWCC Patron/auto mapped	atlas
GWCC Patron/manual map	audiotape
Inter-Library Loan	book
RSCC Patron/auto mapped	cd
Staff	electronic file
UB Eligible/auto mapped	manuscript material
UB Eligible/man mapped	map stacks
Undergraduate Student	micro
VC Patron/manual map	nocirc
voy20012	periodical
voy2003 patron	personal copy
	photocopy
	record
	score
	serial
	software
	three dimensional object
	video

Settings **Intervals**

☒ Charge/Renew ☒ Recall ☒ Hold ☒ Call Slip

☐ UB Loan Period: Day

Renewal Period: Day

Max # of Sequential Renewals:

Fine Interval:

Fine Rate:

Max Fine Amount:

Max Fine for Recalls:

Min Loan Period for Recalled Items: Days

Recall Fine Interval:

Recall Fine Rate:

Grace Period: Days

Recall Return Interval:

Recall Grace Period:

☒ Max Items Borrowed for this Patron Group & Item Type

Renew From: ☒ Original Due Date ☐ Renewal Date

Figure 5-89. Example of a completed Settings Tab of the Add - Circulation Matrix Policy Record Settings dialog box

- To set up intervals for this matrix, click the **Intervals** tab.

Result: The **Interval** tab opens with its check boxes and fields available.

- Enter the appropriate numbers in the each of the fields to provide the interval information (see [Figure 5-90](#)).

Add - Circulation Policy Matrix Record Settings

Patron Group: Item Type:

Patron Group

- (all)
- Courtesy Patron
- DMA Patron/auto mapped
- DMA Patron/manual map
- Faculty
- Graduate Student
- Gw/CC Patron/auto mapped
- Gw/CC Patron/manual map
- Inter-Library Loan
- RSCC Patron/auto mapped
- Staff
- UB Eligible/auto mapped
- UB Eligible/man mapped
- Undergraduate Student
- VC Patron/manual map
- voy20012
- voy2003 patron

Item Type

- (all)
- 1 day reserve item
- 1 week reserve item
- 2 day reserve item
- 2 hour reserve
- archival material
- atlas
- audiotape
- book
- cd
- electronic file
- manuscript material
- map stacks
- micro
- nocirc
- periodical
- personal copy
- photocopy
- record
- score
- serial
- software
- three dimensional object
- video

Settings **Intervals**

Courtesy Notice Interval: 0 days

Minimum Loan for Courtesy: 0 days

First Overdue Interval: 3 days

Lost Interval: 45 days

Other (Overdue) Notice Interval: 2 days

Other (Overdue) Notice Count: 1

Overdue Recall Notice Interval: 3 days

Overdue Recall Notice Count: 2

Hold Shelf Life: 5 Day

Figure 5-90. Completed Intervals Tab

- Click the **Save** button to save the matrix settings and intervals.

Result: The **Matrix** tab displays listing the newly-created matrix (see [Figure 5-91](#)).

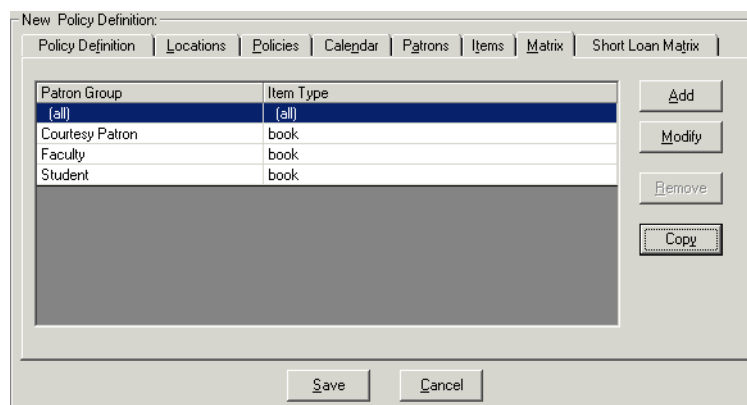


Figure 5-91. Newly-created matrix listed on the Policy Definitions Tab

7. Repeat this process for each Patron Group-Item Type combination that should have a matrix other than the (all)/(all) group.
8. Click on the **Short Loan Matrix** tab to continue to define this Circulation Policy Group (see [Procedure 5-20, Creating a Circulation Policy Group - Short Loan Matrix Tab](#), on page [5-148](#)).



Procedure 5-20. Creating a Circulation Policy Group - Short Loan Matrix Tab

If your site uses short loans, use the following to create a circulation policy matrix for these items.

This includes the information defined on the **Matrix** tab that governs the loan for a specific patron-group and item-type combination and the **Intervals** tab that defines the various interval periods/count for that specific patron-group and item-type combination.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

- After naming the Circulation Policy Group, associating the locations, and defining policies, associating calendars, patrons and items, and defining the matrices, click the **Short Loan Matrix** tab, and then the **Add** button.

Result: The **Short Loan Settings** tab of the **Add - Circulation Policy Matrix Record Settings** (for Short Loans) dialog box opens.

- Select the Patron Group and Item Type matrix whose settings you want to define.
- Specify your setting preferences on the **Short Loan Settings** tab.

See [Table 5-24](#) on [page 5-122](#) for a description of these settings.

- Click the **Intervals** tab to define the intervals for this matrix. See [Figure 5-92](#).

The screenshot shows the 'Add - Circulation Policy Matrix Record Settings' dialog box with the 'Intervals' tab selected. The dialog has two columns for selecting a Patron Group and an Item Type. The Patron Group list includes Bindery, Carrel, Courtesy Patron, Faculty (selected), Graduate Student, Inter-Library Loan, Restricted, Staff, Undergraduate Student, and University Law Students. The Item Type list includes 1 day reserve item (selected), 2 hour reserve, 2 hour short, 3 hour short, cd, and record. The right side of the dialog contains settings for Short Loan Settings and Intervals. The Intervals tab is active, showing fields for Courtesy Notice Interval, Minimum Loan for Courtesy, First Overdue Interval, Lost Interval, Other (Overdue) Notice Interval, and Other (Overdue) Notice Count, each with a numeric input field and a 'days' unit. At the bottom are 'Save' and 'Cancel' buttons.

Figure 5-92. Intervals Tab

- Click the **Save** button to save the matrix settings and intervals.

Result: The **Short Loan Matrix** tab displays with the newly-created matrix.

7. Repeat this process for each patron-group and item-type combination that should have a short loan matrix defined.
-

Editing Circulation Policy Groups

If needed, the Circulation Policy Groups can be edited. Any changes affect future circulation transactions only.

The system does not archive any portion of the policies attached to each Circulation Policy Group and all changes take effect immediately. For example, if you decide to change a renewal policy, the change automatically applies to any subsequent renewal transaction regardless of what the previous renewal policy was when the item was first charged or renewed. At the same time, changes to circulation policies are not applied retroactively to active circulation transactions. For example, if you change a loan period, this applies only to all subsequent transactions. It does not alter the due dates for items charged when the previous loan period was in effect.

Also remember that if an item's location is moved to a location belonging to another Circulation Policy Group, that Group's circulation policies apply to all subsequent circulation transactions involving the item.

For this reason, you may wish to keep your own record of policy changes and their effective dates in order to handle possible patron questions or complaints.

NOTE:

When moving a location from the **Selected** list to the **Available** list, the system checks if the location is the OPAC Circulation Desk for the group. If so, a warning message displays asking the user to select a different OPAC Circulation desk before moving the current one (see [Figure 5-93](#)).

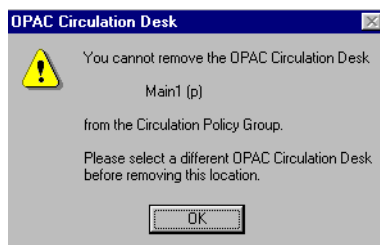


Figure 5-93. OPAC Circulation desk warning message

The system also checks if the location is a Circulation Desk for the group. If so, a warning message displays asking the user if they want to remove this location (see [Figure 5-94](#)).

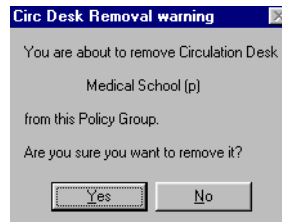


Figure 5-94. Circulation Desk Removal warning

NOTE:

If you are attempting to remove the last Pickup location from a Circulation Policy Group the system displays a warning message, asking the operator if they do want to remove the location, thereby leaving the group with no Pickup locations (see [Figure 5-95](#)).

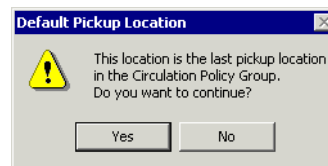


Figure 5-95. Pickup location removal warning



Procedure 5-21. Editing a Circulation Policy Group

Use the following to edit a Circulation Policy Group.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. Highlight the Circulation Policy Group you want to edit and click the **Edit** button.

Result: The **Edit Policy Definitions** section opens.

3. Select the tab(s) you want to edit, enter the information, and click the **Save** button to save the changes. See [Editing Circulation Matrix Information](#) on [page 5-154](#) for specific information on editing the **Matrix** tab.

Deleting Circulation Policy Groups

Deleting a Circulation Policy Group is not allowed if it has any circulation transactions associated with it. When an operator attempts to delete it, a warning message stating why the delete is not allowed displays (see [Figure 5-96](#)).

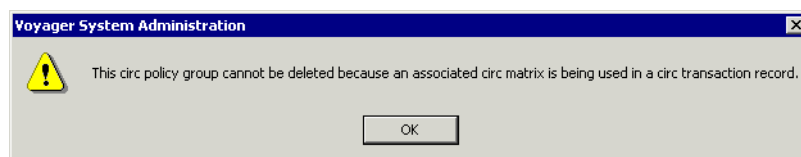


Figure 5-96. Circulation Policy Group cannot be deleted message



Procedure 5-22. Deleting a Circulation Policy Group

Use the following to delete a Circulation Policy Group.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. Highlight the Circulation Policy Group you want to delete. In the example in [Figure 5-97](#) the Voyager Test db CPG2 group will be deleted. Click the **Delete** button.

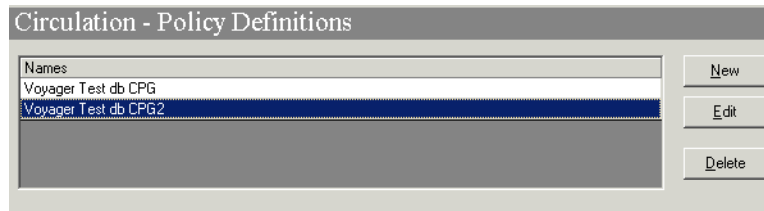


Figure 5-97. Circulation Policy Group to be deleted is highlighted

Result: The **Delete Policy Definitions** dialog box displays asking for confirmation of the deletion displays (see [Figure 5-98](#)).

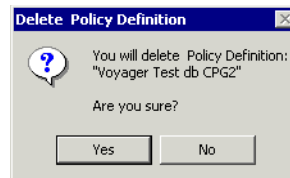


Figure 5-98. Confirmation message before deleting the Circulation Policy Group

3. Click the **Yes** button to delete this Circulation Policy Group.

Result: The Circulation Policy Group is deleted, and no longer displays in the list in the **Circulation - Policy Definitions** workspace (see [Figure 5-99](#)).

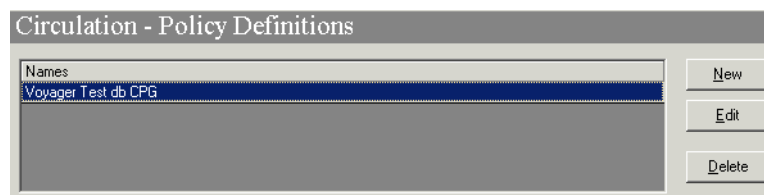


Figure 5-99. List of Circulation Policy Groups after deleting a group

NOTE:

See [Deleting a Circulation Policy Matrix](#) on [page 5-160](#) for specific information on deleting a Circulation Matrix.

Editing a Circulation Policy Matrix

If needed the Circulation Policy Matrix can be edited. Any changes affect future circulation transactions.

Items currently charged, if renewed, will have the new (edited) policies applied to them as the renewal is considered a future transaction.



Procedure 5-23. Editing Circulation Matrix Information

Use the following to edit a Circulation Matrix.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. Select the Circulation Policy Group containing the Circulation Matrix to edit and click the **Edit** button.
3. Select the **Matrix** tab.

Result: The **Matrix** tab opens (see [Figure 5-100](#)).

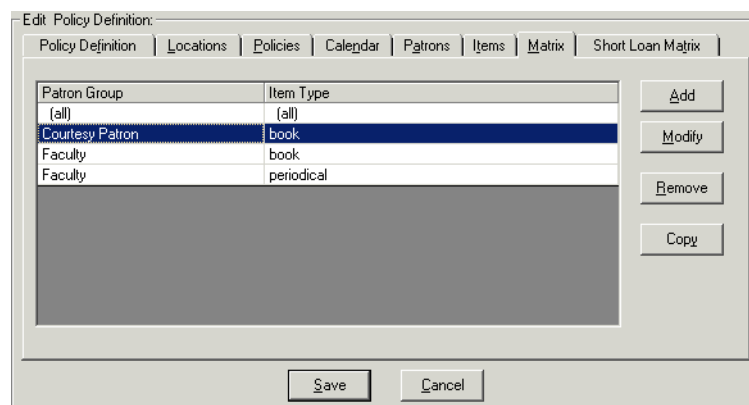


Figure 5-100. Matrix Tab

4. Select the matrix you want to edit and click the **Modify** button.

Result: In this example the matrix for Courtesy Patron-Book matrix will be modified. The **Circulation Policy Matrix Record Settings** dialog box for that matrix displays with the **Settings** tab available (see [Figure 5-101](#)).

The screenshot shows the 'Circulation Policy Matrix Record Settings' dialog box with the 'Settings' tab selected. The 'Patron Group' is set to 'Courtesy Patron' and the 'Item Type' is 'book'. The 'Settings' tab contains the following fields and options:

- ☒ Charge/Renew
- ☒ Recall
- ☒ Hold
- ☒ Call Slip
- ☐ UB
- Loan Period: 21 Term
- Renewal Period: 21 Term
- Max # of Sequential Renewals: 2
- Fine Interval: Day
- Fine Rate: \$0.15
- Max Fine Amount: \$10.00
- Max Fine for Recalls: \$10.00
- Min Loan Period for Recalled Items: 10 Days
- Recall Fine Interval: Day
- Recall Fine Rate: \$0.25
- Grace Period: 3 Days
- Recall Return Interval: 5
- Recall Grace Period: 10
- ☒ Max Items Borrowed for this Patron Group & Item Type: 1
- Renew From: ☐ Original Due Date ☒ Renewal Date

At the bottom are 'Save' and 'Cancel' buttons.

Figure 5-101. Circulation Policy Matrix Record Settings, Settings Tab

5. Edit the wanted fields on the **Settings** tab.
6. Click the **Intervals** tab and edit those fields as wanted.

Result: The **Intervals** tab appears (see [Figure 5-101](#)).

The screenshot shows the 'Circulation Policy Matrix Record Settings' dialog box with the 'Intervals' tab selected. The 'Patron Group' is set to 'Courtesy Patron' and the 'Item Type' is set to 'book'. The 'Settings' tab is also visible. The 'Intervals' tab contains the following settings:

- Courtesy Notice Interval: 0 days
- Minimum Loan for Courtesy: 0 days
- First Overdue Interval: 7 days
- Lost Interval: 90 days
- Other (Overdue) Notice Interval: 14 days
- Other (Overdue) Notice Count: 2
- Overdue Recall Notice Interval: 8 days
- Overdue Recall Notice Count: 2
- Hold Shelf Life: 5 Day

At the bottom of the dialog box are 'Save' and 'Cancel' buttons.

Figure 5-102. Circulation Policy Matrix Record Settings, Intervals Tab

7. Click the **Save** button to save your changes or click **Cancel** to cancel your changes.

Result: The edits are completed and the system returns to the **Matrix** tab.



Procedure 5-24. Copying Circulation Matrix Information to a New Matrix

Use the following to copy a Circulation Matrix.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. Select the Circulation Policy Group containing the Circulation Matrix to copy. In this example the Faculty-Book circulation matrix will be copied.

Result: The **Copy - Circulation Policy Matrix Record Settings** dialog box opens (see [Figure 5-103](#)). The information from the Faculty-Book matrix populates the fields on the **Settings** and **Intervals** tab.

Figure 5-103. Copy - Circulation Policy Matrix Record Settings dialog box

3. Select the Patron Group and Item Type whose Circulation Matrix you want to define. In this example, the Faculty-Periodical Circulation Matrix will be defined (see [Figure 5-104](#)).

NOTE:

If wanted, users can edit any of the fields on either tab.

Copy - Circulation Policy Matrix Record Settings

Patron Group: Item Type:

Patron Group	Item Type
(all)	(all)
Bindery	1 week reserve item
Carrel	archival material
Courtesy Patron	atlas
Faculty	audiotape
Graduate Student	Book
Inter-Library Loan	electronic file
Restricted	ill
Staff	manuscript material
Status Patron Group	map stacks
Undergraduate Student	micro
University Law Students	nocirc
URSA-NCIP	periodical
	personal copy
	photocopy
	score
	serial
	Serial: Prev Bound
	Serial:prev unbound
	software
	three dimensional object
	URSA-NCIP
	video

Settings **Intervals**

☒ Charge/Renew ☒ Recall ☒ Hold ☒ Call Slip

☐ UB Loan Period:

Renewal Period:

Max # of Sequential Renewals:

Fine Interval:

Fine Rate:

Max Fine Amount:

Max Fine for Recalls:

Min Loan Period for Recalled Items: Days

Recall Fine Interval:

Recall Fine Rate:

Grace Period: Days

Recall Return Interval:

Recall Grace Period:

☒ Max Items Borrowed for this Patron Group & Item Type

Renew From: ☒ Original Due Date ☐ Renewal Date

Figure 5-104. Copying a Circulation Matrix

Result: The Faculty-Periodical Circulation Matrix is defined containing the same settings and intervals as the Faculty-Book Circulation Matrix.

- Click the **OK** button to save these changes or click **Cancel** to cancel these changes.

Result: The system returns to the **Matrix** tab listing the newly-defined Circulation Matrix (see [Figure 5-105](#)).

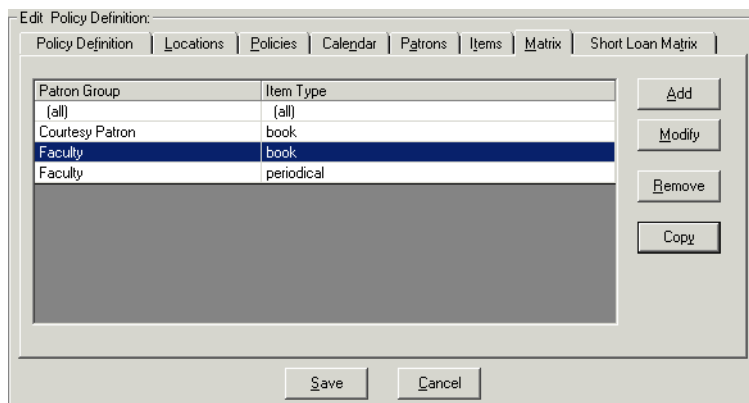


Figure 5-105. Matrix Tab with newly-defined Circulation Matrix

Deleting a Circulation Policy Matrix

Deleting a Circulation Policy Matrix is not allowed if it has circulation transactions associated with it. After the confirmation message ([Figure 5-107](#)), when an operator attempts to delete it, a warning message stating the delete is not allowed displays (see [Figure 5-106](#)).

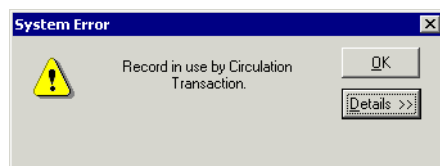


Figure 5-106. Unable to delete the matrix

NOTE:

Operators are not allowed to delete the all/all matrix.



Procedure 5-25. Deleting a Circulation Policy Matrix

Use the following to delete a Circulation Policy Matrix.

1. Access the **Circulation - Policy Definitions** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Policy Definitions** button in the Circulation listbar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. Select the Circulation Policy Group containing the Circulation Matrix to delete and click the **Edit** button.
3. Highlight the matrix you wish to delete and click the **Remove** button. In this example the Faculty-periodical circulation matrix will be removed.

Result: A message asking for confirmation of the deletion displays (see [Figure 5-107](#)).

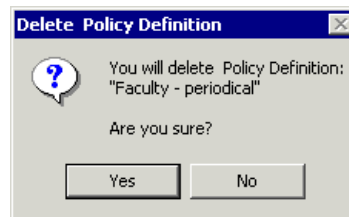


Figure 5-107. Confirmation message before deleting the Circulation Policy Matrix

4. Click the **Yes** button to delete this Circulation Policy Matrix.

Result: The Circulation Policy Matrix is deleted, and no longer displays in the list on the **Matrix** tab.

Circulation Alerts at Discharge and Charge

Administrators can configure alerts to the circulation operator if particular conditions exist or arise when an item is discharged or charged.

Alerts are configured using the **Alerts** tab (Figure 5-108) of the **Location Settings** dialog box for a selected circulation happening location (see Table 5-12 on page 5-61 and [Circulation Locations \(Circulation Happening Locations\)](#) on page 5-62 for additional information). When an operator logs into the Circulation module, they also are logged into a particular circulation happening location (or they select a circulation happening location from the **Select Current Location** dialog box.) Therefore, the configuration associated with the active circulation happening location has the alert settings that are used.

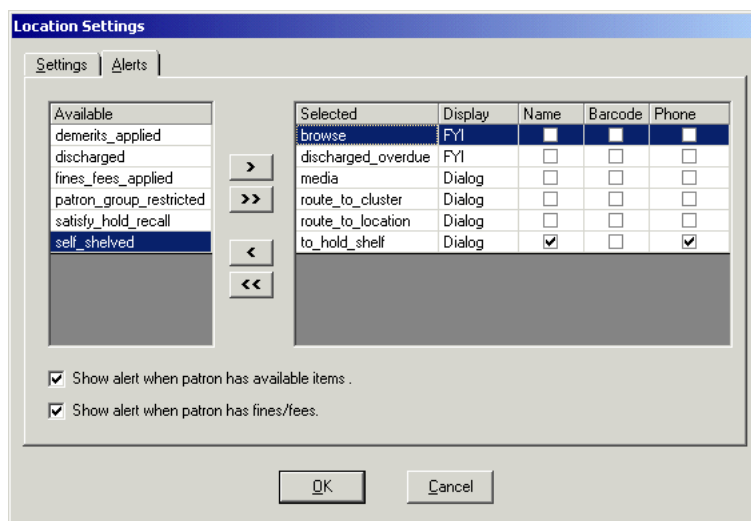


Figure 5-108. Alerts Tab associated with a particular circulation happening location

Administrators can determine:

- the conditions for which an alert displays.
- the way in which the alert displays, either in a **Circulation Alerts** dialog box or in the **FYI** column of the **Discharge** workspace.

For the `to_hold_shelf` alert, administrators can control which patron information displays, if wanted. Currently patron information cannot be configured to display with other alerts.

Some examples of when alerts might be used are:

- When a discharged item has a hold request, a message including the requesting patron's name, barcode, or phone number can be displayed.
- When charging or discharging an item, if the patron has any outstanding fines, fees, or demerits an alert can be configured, even if the item being discharged does not create those fees.
- When charging or discharging an item, if there are any available requested items for the patron, an alert can be configured.

Any time the patron record displays, such as when a patron is charging or discharging an item, the system can be configured to check if the patron has outstanding fines, fees, or demerits and if the patron has any requested items available. Also, when an item is discharged, there are twelve other alerts the system can check and then display.

Alert Conditions when Charging

When a patron record is first opened in either the **Charge** workspace or the **Patron** workspace, the two conditions that elicit a circulation alert (if wanted) are:

- the patron has outstanding fines, fees, or demerits
- the patron has requested items available

For each of these conditions administrators can configure an alert to the circulation operator. These alerts automatically display in a **Circulation Alerts** dialog box.

Alert Conditions when Discharging

Alerts display when discharging an item from the **Discharge** workspace, or from the **Charged Items Index** dialog box. [Table 5-26](#) shows a list of the possible conditions that could exist or arise when discharging an item. For each of these conditions administrators can configure an alert to the circulation operator, if wanted.

Table 5-26. Discharge Conditions

Available Alert on Alerts Tab (System Administration)	Condition	Text of Alert
Show alert when patron has fines/fees	Patron has outstanding fines, fees, or demerits.	Patron has outstanding fines, fees, or demerits. NOTE: Automatically displays in a Circulation Alerts dialog box.
Show alert when patron has available items	Patron has available requested items.	Patron has requested items available. NOTE: Automatically displays in a Circulation Alerts dialog box.
discharged	Item is discharged.	Discharged.
discharged_overdue	Item is overdue.	Overdue.
browse	Item was browsed (never charged out.)	Browse.
satisfy_hold_recall	Item satisfies a hold or recall request.	Item satisfies a hold/recall request.
to_hold_shelf	Item should be routed to a hold shelf.	On hold for: <i>patron information</i> NOTE: Administrators can configure specific patron information to display, such as the patron's name, barcode, and/or phone number.

Table 5-26. Discharge Conditions

Available Alert on Alerts Tab (System Administration)	Condition	Text of Alert
route_to_location	Item should be routed to another location (within the same circulation cluster.)	Route to: <i>circulation location</i>
route_to_cluster	Item should be routed to another cluster (a location outside of the current circulation cluster.)	at: <i>name of cluster</i>
finer_fees_applied	Fines and fees are applied to the patron's record (related to this item.)	Fines
demerits_applies	Demerits are applied to the patron's record (related to this item.)	Demerits
media	Item is associated with a Media location.	Route to Media Scheduling
patron_group_restrict	Patron Group restricted (due to Circulation security profile associated with the operator logged in.) See Patron Groups Tab on page 9-97.	Patron Group restricted.
self_shelved	Item was Self-shelved (item that was never discharged.)	Item was Self-shelved.

NOTE:

Alerts are not configured for block conditions. In this case the **Block Information** dialog box displays.

Methods to Display an Alert

Alerts can display in a **Circulation Alerts** dialog box, such as in [Figure 5-109](#). This alert stops the circulation processing and requires the operator to acknowledge the alert by clicking the **OK** button before performing more discharges.

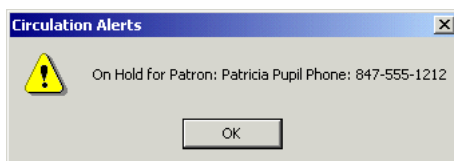


Figure 5-109. Circulation Alerts dialog box display

NOTE:

The outstanding fines, fees, demerits alert, and the requested item available alert automatically display in a **Circulation Alerts** dialog box.

Or, alerts can be configured to appear in the **FYI** column ([Figure 5-110](#)) of the **Discharge** workspace.

A screenshot of the "Discharge" workspace window. It has a title bar "Discharge" and a toolbar with a clock icon. Below the toolbar, there are fields for "Library:" (containing "WHITESHORE") and "Item Barcode:". Below these fields is a table with six columns: Title, Location, Item Barcode, Due Date, FYI, and Fines. The table contains one row of data.

Title	Location	Item Barcode	Due Date	FYI	Fines
Cardiac rehabilitation, adult fitness, and exercise testing / Philip K. Wilson, Paul S. Fardy, Victor F. Froelicher.	Main [P]	00423	9/17/2010 11:59 PM	Discharged Patron: Bob Smith Barcode: 321 Phone:	\$6.

Figure 5-110. Circulation Alert (FYI Column)

Finally, alerts can also be ignored and not reported in either the **Circulation Alerts** dialog box or the **FYI** column of the **Discharge** workspace.

Configuring Circulation Alerts

Configuring circulation alerts to display in the circulation module occurs in the System Administration module, **Location Settings** dialog box on the **Alerts** tab. [Figure 5-111](#) shows the **Alerts** tab.

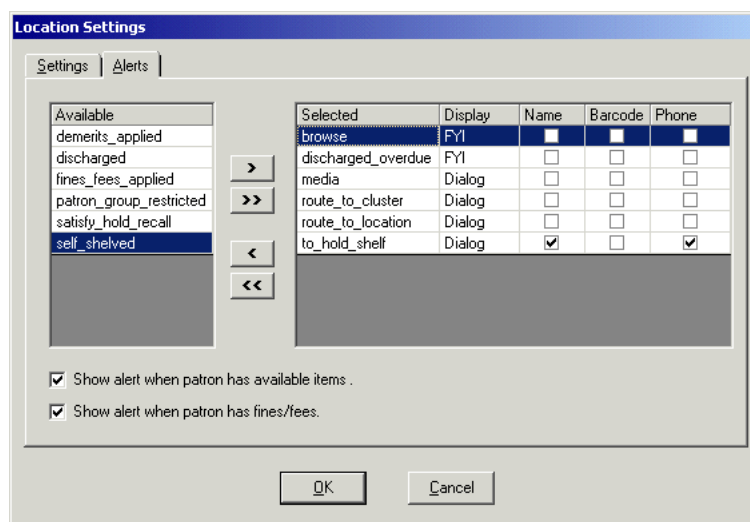


Figure 5-111. Alerts Tab

[Table 5-27](#) describes the **Alerts** tab.

Table 5-27. Alerts Tab

Component	Description	Range
Available column	The possible conditions that occur at discharge for which a message alert can be configured. See Alert Conditions when Discharging .	System defined.
Selected column	The selected conditions for which an alert displays.	Move from Available column.
Display column	The way the alert displays in the Circulation module. - FYI displays in the FYI column. - Dialog - displays in the Circulation Alerts dialog box.	FYI column or Dialog box.
Name Column	When selected, the patron's name displays in the alert. Use for the to_hold_shelf alert if wanted.	Check box

Table 5-27. Alerts Tab

Component	Description	Range
Barcode Column	When selected, the patron's barcode displays in the alert. Use for the to_hold_shelf alert if wanted.	Check box
Phone Column	When selected, the patron's phone number displays in the alert. Use for the to_hold_shelf alert if wanted.	Check box
Show alert when patron has available items check box	When selected, if the patron has available items (from a hold or recall request) an alert displays at charge or discharge. NOTE: Displays in a Circulation Alerts dialog box only.	Check box
Show alert when patron has fines/fees check box	When selected, if the patron has outstanding fines/fees (or demerits) an alert displays at charge or discharge. This does not include accrued fines or demerits. NOTE: Displays in a Circulation Alerts dialog box only.	Check box

If multiple discharge conditions exist, each is reported on a separate line in the FYI column of the Discharge dialog box using the method configured.

[Figure 5-112](#) shows two alerts reported in the **Circulation Alerts** warning display.



Figure 5-112. Multiple Alerts Displayed

All alerts display as configured. As a result, operators may see both the **Circulation Alerts** warning display and alert information in the FYI column of the Discharge dialog box after discharging a particular item.

NOTE:

Circulation alerts are independent of printing notification slips (see the *Voyager Circulation User's Guide*, *CIRC.INI*). For example, if a hold slip is set to print, it prints and a **Circulation Alerts** warning displays if configured.

In the Circulation module **Session Preferences** dialog box, the operator can change the settings for the outstanding fines, fees, demerits, and the requested item available alerts for the current session. Selecting these check boxes overrides the System Administration module's configuration. For additional information regarding session preferences, see the *Voyager Circulation User's Guide*.

For the step-by-step procedure regarding how to configure circulation alerts, see [Procedure 5-14, Configuring Circulation Alerts](#).

Request Configuration

The purpose of the Circulation - Request Configuration options is to provide the ability for you to set the configuration in Voyager System Administration that determines whether copy-level and/or title-level holds and/or recalls are available for requests from:

- Circulation
- WebVoyage
- Primo/OvP (OPAC via Primo)

These settings are available at a circulation cluster level. As a result, you are prompted to select the cluster environment for which you are making the Circulation - Request Configuration changes if your system is set up with multiple clusters.

NOTE:

When you have implemented Request Groups, your Request Group settings, in addition to your Request Configuration settings, determine the hold/recall options that display for the user. See [Request Groups](#) on [page 5-178](#) for more information.

For a summary of the various configuration combinations and the resulting request options displayed, see [Table 5-28](#).

Table 5-28. Request Options Displayed Summary

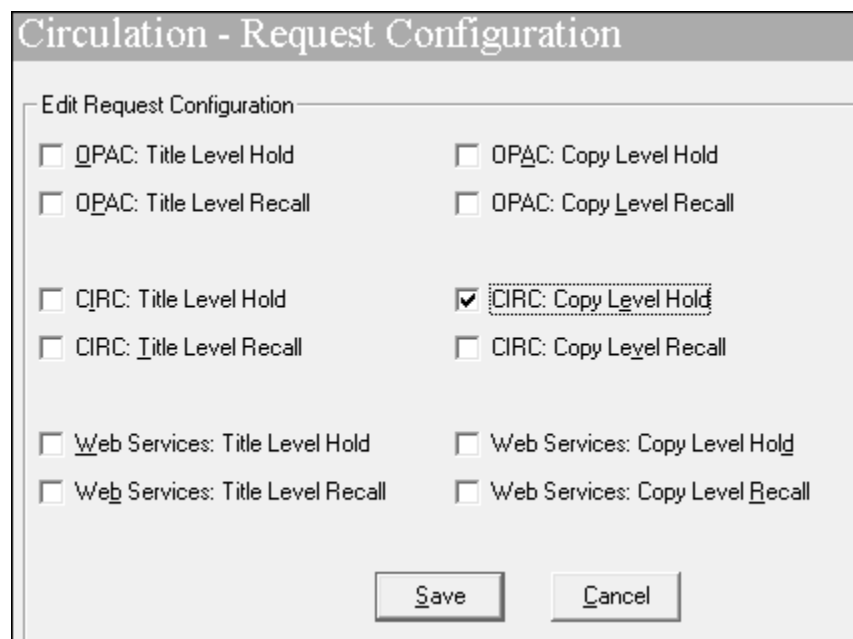
Title Level Hold/Recall Specified?	Copy Level Hold/Recall Specified?	Request Groups Defined?	Request Options Displayed in the Request Form
Yes	Yes	Yes or No	Title- and copy-level requests display. Request Groups display when they are defined.
Yes	No	Yes or No	Title-level requests display. Request Groups display when they are defined.
No	Yes	Yes or No	Copy-level requests display. Request Groups display when they are defined.
No	No	Yes	Only Request Groups display.
No	No	No	No request options are available.

For configuration examples and additional information, see:

- [CIRC Configuration Examples](#) on [page 5-170](#)
- [option.displayRequestGroups Parameter](#) on [page 5-175](#)
- [WebVoyage Settings in the webvoyage.properties File for option.displayRequestGroups and Page Messages](#) on [page 5-177](#)
- [Primo/OvP \(option.displayRequestGroups\)](#) on [page 5-178](#)

CIRC Configuration Examples

Select one or more options to enable the copy-level and/or title-level holds and/or recalls that address your requirements. For example, to enable the capability for copy-level holds only in Circulation, select the **CIRC: Copy Level Hold** option. See [Figure 5-113](#).



The image shows a dialog box titled "Circulation - Request Configuration". It contains a section labeled "Edit Request Configuration" with a grid of checkboxes. The checkboxes are arranged in two columns. The first column contains: "OPAC: Title Level Hold", "OPAC: Title Level Recall", "CIRC: Title Level Hold", "CIRC: Title Level Recall", "Web Services: Title Level Hold", and "Web Services: Title Level Recall". The second column contains: "OPAC: Copy Level Hold", "OPAC: Copy Level Recall", "CIRC: Copy Level Hold" (which is checked), "CIRC: Copy Level Recall", "Web Services: Copy Level Hold", and "Web Services: Copy Level Recall". At the bottom of the dialog are "Save" and "Cancel" buttons.

Edit Request Configuration	
☐ OPAC: Title Level Hold	☐ OPAC: Copy Level Hold
☐ OPAC: Title Level Recall	☐ OPAC: Copy Level Recall
☐ CIRC: Title Level Hold	☒ CIRC: Copy Level Hold
☐ CIRC: Title Level Recall	☐ CIRC: Copy Level Recall
☐ Web Services: Title Level Hold	☐ Web Services: Copy Level Hold
☐ Web Services: Title Level Recall	☐ Web Services: Copy Level Recall

Save Cancel

Figure 5-113. Circulation - Request Configuration

Selecting the **CIRC: Copy Level Hold** option determines the options that display in the Circulation module when placing a request. See [Figure 5-114](#). In [Figure 5-114](#), the Recall request type is not selectable since it was not identified as a Request Configuration type in [Figure 5-113](#); and only copy-level requests can be placed from the **Title or Copy Level** area of the Place Requests dialog box.

Place Request

Patron Information

Name:

Library:

Barcode:

Group: ☐ Library Administrative Request

Request Details

☐ Request Type:

☒ Hold ☐ Remote Storage

☐ Recall ☐ Short Loan

☐ Call Slip

Title or Copy Level:

☐ Title: For Items At:

☒ Copy

Pickup At: Expires:

Comment:

Figure 5-114. Circulation Place Request Example

If no title- or copy-level configuration options for holds and/or recalls are selected for the Circulation module, the **Title or Copy Level** area of the Place Requests dialog box does not display and the Hold/Recall options are not selectable. See [Figure 5-115](#).

Place Request

Patron Information

Name: Roger Smith

Library: C1 for dev724

Barcode: 321

Group: CL1 patron

☐ Library Administrative Request

Request Type:

☐ Hold ☐ Remote Storage

☐ Recall ☐ Short Loan

☒ Call Slip

Pickup At: CL1 Circulation Desk

Comment:

OK Cancel

Figure 5-115. No Title- or Copy-Level Hold/Recall Requests Configured Example

When all of the Circulation module options are selected in the Circulation - Request Configuration area (see [Figure 5-116](#)), the Place Requests dialog box displays active Hold/Recall options for title- and copy-level requests (see [Figure 5-117](#)).

Circulation - Request Configuration

Edit Request Configuration

☐ OPAC: Title Level Hold	☐ OPAC: Copy Level Hold
☐ OPAC: Title Level Recall	☐ OPAC: Copy Level Recall
☒ CIRC: Title Level Hold	☒ CIRC: Copy Level Hold
☒ CIRC: Title Level Recall	☒ CIRC: Copy Level Recall
☐ Web Services: Title Level Hold	☐ Web Services: Copy Level Hold
☐ Web Services: Title Level Recall	☐ Web Services: Copy Level Recall

Figure 5-116. All Circulation Module Options Selected

Place Request

Patron Information

Name:

Library:

Barcode:

Group: ☐ Library Administrative Request

Atlas and glossary of primary sedimentary structures, by F. J. Pettijohn and Paul Edwin Potter. Translations into Spanish, French, and German by Juan Carlos Riggi, Marie-Hélène Sachet, and Hans-

Request Type:

☒ Hold ☐ Remote Storage ☐ Recall ☐ Short Loan ☐ Call Slip

Title or Copy Level:

☒ Title: For Items At: ☐ Copy

Pickup At: Expires:

Comment:

Figure 5-117. All Title- or Copy-Level Hold/Recall Requests Configured Example

NOTE:

The **For Items At** drop-down list (see [Figure 5-117](#)) for title-level requests displays the request groups available as configured in Circulation - Request Groups (see [Request Groups](#) on [page 5-178](#)).

option.displayRequestGroups Parameter

For institutions that have implemented Request Groups (Any Copy At) to control the handling of requests (see [Figure 5-118](#)), there is an additional parameter (`option.displayRequestGroups=`) that needs to be enabled/set to **Y** for:

- WebVoyage
(see [WebVoyage Settings in the webvoyage.properties File for option.displayRequestGroups and Page Messages](#) on [page 5-177](#))
 - Primo/OvP
(see [Primo/OvP \(option.displayRequestGroups\)](#) on [page 5-178](#))
-

Title: Assessment in the mathematics classroom /

Instructions: Please select an item.

☐ Any Copy

☒ Any Copy At: Request Group 1

☒ This Copy: c.0 35175 Main Stacks

Comment: c.0 35175 Main Stacks
c.0 45146B Main Stacks
c.0 72934B Juvenile Education

Pick Up At: Circulation Desk

Not Needed After: 2013-05-25

Barcode

Submit Cancel

Figure 5-118. Any Copy At

NOTE:

The request groups (Any Copy At) only display when there are multiple items and, at least, one of the items is in a different request group.

When the Request Configuration options for holds/recalls are not selected (see [Figure 5-119](#)) and request groups have been implemented, the system displays the hold or recall page for any items in a request group (Any Copy At).

Circulation - Request Configuration	
Edit Request Configuration	
☒ OPAC: Title Level Hold	☐ OPAC: Copy Level Hold
☐ OPAC: Title Level Recall	☐ OPAC: Copy Level Recall
☐ CIRC: Title Level Hold	☐ CIRC: Copy Level Hold
☐ CIRC: Title Level Recall	☐ CIRC: Copy Level Recall
☐ Web Services: Title Level Hold	☐ Web Services: Copy Level Hold
☐ Web Services: Title Level Recall	☐ Web Services: Copy Level Recall
Save Cancel	

Figure 5-119. Request Configuration Options Not Selected for Holds/Recalls

WebVoyage Settings in the webvoyage.properties File for option.displayRequestGroups and Page Messages

For WebVoyage, the `option.displayRequestGroups=` parameter is located in the `webvoyage.properties` file that is located in `/m1/voyager/xxxdb/tomcat/vwebv/context/vwebv/ui/en_US/` where `xxxdb` is your database name (see [Figure 5-120](#)). Enable this parameter by setting its value to **Y**.

```
#=====#  
# Option to display request groups ("Any copy at") on hold and recall request forms  
#=====#  
option.displayRequestGroups=Y
```

Figure 5-120. webvoyage.properties File

When the Request Configuration options for holds/recalls are not selected, request groups have been implemented, and there are no items in a request group, the system displays a message indicating that the item is not available for a hold (or recall) request. These messages are defined in `webvoyage.properties` (see [Figure 5-121](#)).

```
page.patronRequests.message.requestblocked-1=No items are available for Hold requests.  
page.patronRequests.message.requestblocked7=No items are available for recall.
```

Figure 5-121. webvoyage.properties Messages

Primo/OvP (`option.displayRequestGroups`)

For Primo/OvP (OPAC via Primo), the `option.displayRequestGroups=` parameter is located in the `vxws.properties` file that is located in `/m1/voyager/xxxxdb/tomcat/vxws/context/vxws/ui/eng/` where `xxxxdb` is your database name. Enable this parameter by setting its value to **Y**.

NOTE:

The default setting for `option.displayRequestGroups=` is **N**. Continue to set this to **N**, until you are using a release of Primo that supports this option.

Request Groups

Request Groups allow institutions to associate locations into groups for the purpose of placing holds and recalls. For a title level request, only items whose permanent or temporary location is included in this group may fill the request.

For example, if an institution has multiple branches, a user might associate all locations from one branch in a single request group. Then, if there are multiple copies of the item at multiple locations, a user can specify that only item(s) at the Request Group be placed on hold. Other copies (at the locations not associated with the Request Group) would not be eligible to fill the request.

You can add or edit request groups, and designate which locations belong to which request groups.

Security

Operators linked to a Master security profile, where the **Circulation Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Circulation - Request Groups** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Rules for Request Groups

A location may only be assigned to one Request Group.

Request Groups are available in the Circulation module and in WebVoyage, if they have been activated in the `opac.ini` configuration file.

Request Groups Workspace

Creating Request Groups is done in the **Circulation - Request Groups** workspace in the System Administration module (see [Figure 5-122](#)).

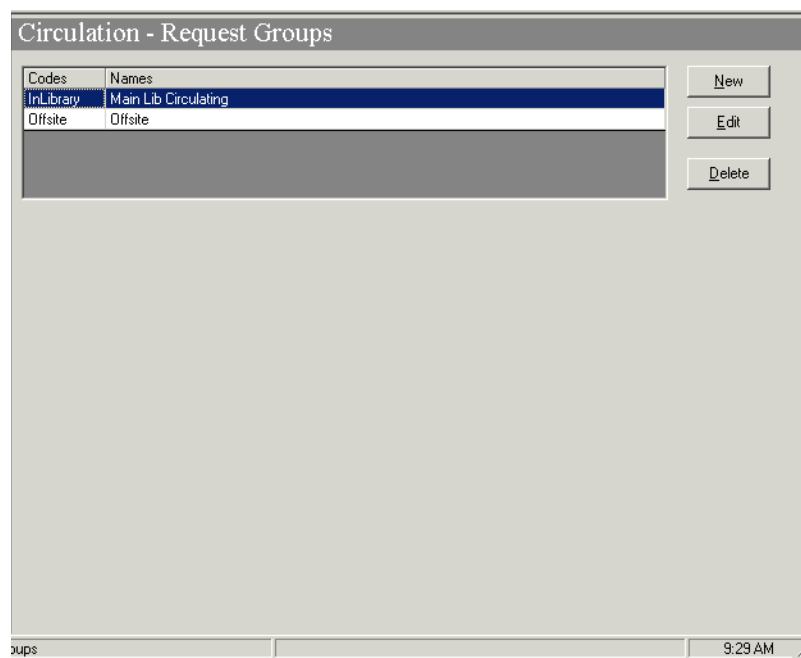


Figure 5-122. Circulation - Request Group Workspace

The bottom part of this workspace, visible after clicking the **New** or **Edit** button, contains a **Group** tab and a **Locations** tab (see [Figure 5-123](#)).

The screenshot displays the 'Circulation - Request Groups' workspace. At the top, there is a table with two columns: 'Codes' and 'Names'. The first row contains 'InLibrary' and 'Main Lib Circulating'. To the right of the table are three buttons: 'New', 'Edit', and 'Delete'. Below the table is a section titled 'New Request Group:' which contains two tabs: 'Group' and 'Locations'. The 'Group' tab is currently selected, showing a form with two input fields: 'Code:' and 'Name:'. At the bottom of the form are two buttons: 'Save' and 'Cancel'.

Codes	Names
InLibrary	Main Lib Circulating

New Request Group:

Group | Locations

Code:

Name:

Save Cancel

Figure 5-123. Circulation Request Groups Workspace with Group and Location tabs

Group Tab

The **Group** tab is where you provide a name and code for your request group (see [Figure 5-123](#)).

[Table 5-29](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Group** tab.

Table 5-29. Fields on the Group Tab of the Request Groups Workspace

Name	Description	Required	Type and Range
Code	The code given to the Request Group.	Yes	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 10 characters.
Name	The name given to the Request Group.	Yes	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 25 characters.

Location Tab

The **Location** tab is where you provide the locations that belong to the request group (see [Figure 5-124](#)).

The screenshot shows the 'Circulation - Request Groups' workspace. At the top, there is a table with two columns: 'Codes' and 'Names'. The table contains three rows: 'InLibrary' with 'Main Lib Circulating', 'Offsite' with 'Offsite', and an empty row. To the right of this table are buttons for 'New', 'Edit', and 'Delete'. Below the table is a section titled 'New Request Group:' with two tabs: 'Group' and 'Locations'. The 'Locations' tab is active, showing an 'Available' list on the left and a 'Selected' list on the right. The 'Available' list contains the following items: Periodicals Room, Reference Department, Microform Room, Rare Book Collection, Reference Maps, Cataloging Desk, Circulation Desk, Acquisitions Desk, Reserve Desk, and Government Documents. Between the two lists are four buttons: '>', '>>', '<<', and '<'. At the bottom of the workspace are 'Save' and 'Cancel' buttons.

Figure 5-124. Circulation Request Groups Workspace Location Tab

[Table 5-30](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Group** tab.

Table 5-30. Fields in the Location Tab of the Request Groups Workspace

Name	Description	Required	Type and Range
Available list box	The locations that are available to add to the request group.	Yes	List of all locations in the Circulation Cluster.
Selected list box	The locations that are in the request group.	Yes	List of all locations in the Circulation Cluster that are a part of the Request Group.



Procedure 5-26. Creating a Request Group

Use the following to create a Request Group.

1. Access the **Circulation - Request Groups** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Request Groups** button in the Circulation listbar.

Result: The **Circulation - Request Groups** workspace opens.

2. Click the **New** button.

Result: The bottom half of the **Circulation - Request Groups** workspace opens to the **New Request Groups** section, with the **Group** tab available.

3. Enter a Request Group code in the **Code** field, and enter a Request Group name in the **Name** field (see [Figure 5-125](#)).

The screenshot shows a window titled "New Request Group:". It has two tabs at the top: "Group" and "Locations". The "Group" tab is active. Inside the tab, there are two text input fields. The first is labeled "Code:" and contains the text "Branch". The second is labeled "Name:" and contains the text "Branch Library". At the bottom of the window, there are two buttons: "Save" and "Cancel".

Figure 5-125. Group Tab

4. Add locations to this Request Group.

**IMPORTANT:**

*Each Request Group must have at least one location assigned to it.
(Without a location, a Request Group has no function.)*

- a. Click the **Locations** tab.
- b. Highlight the location(s) you want to associate with this Request Group in the **Available** list box (see [Figure 5-126](#)).

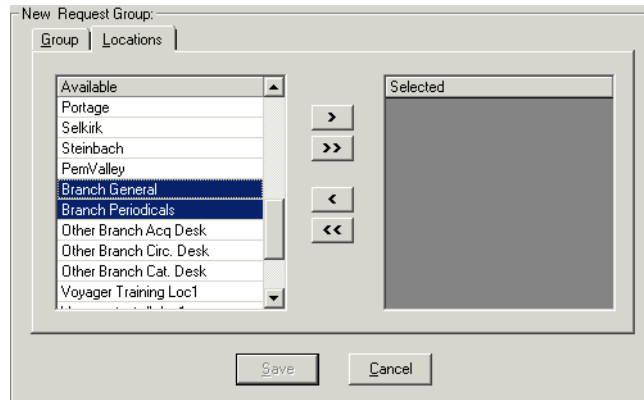


Figure 5-126. Available Locations list box

- c. Click the **>** button (see [Figure 5-127](#)). The locations move from the **Available** list box to the **Selected** list box.

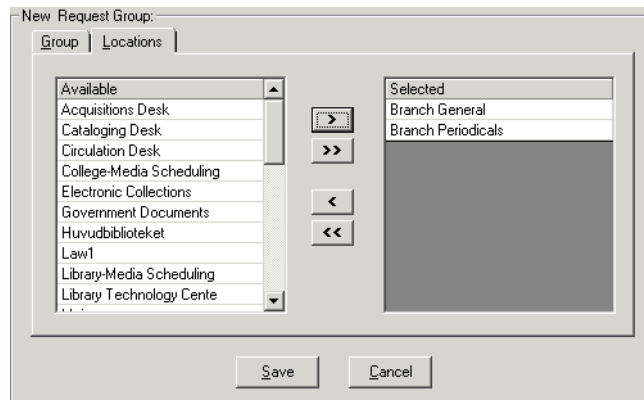


Figure 5-127. Selected Locations list box

NOTE:

If you want to select all of the locations click the **>>** button.

- d. Click the **Save** button.

Result: The system returns to the **Circulation - Request Groups** workspace and the new Request Group is listed (see [Figure 5-128](#)).

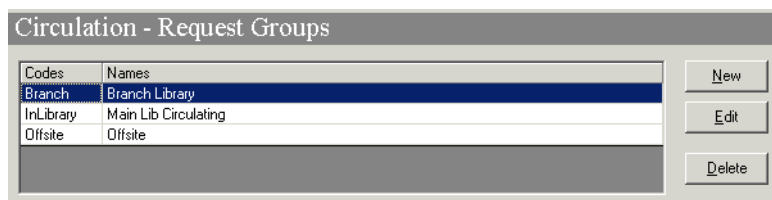


Figure 5-128. Circulation - Request Groups with new group added

Editing Request Groups

Operators may edit Request Groups as necessary.



Procedure 5-27. Editing a Request Group

Use the following to edit a request group.

1. Access the **Circulation - Request Groups** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Request Groups** button in the Circulation listbar.

Result: The **Circulation - Request Groups** workspace opens.

2. Click the **Edit** button.

Result: The bottom half of the **Circulation - Request Groups** workspace opens to the **Edit Request Groups** section, with the **Group** tab available.

3. To edit
 - a. the group code or name, on the **Group** tab, enter the information into the appropriate fields.
 - b. the locations, click the **Locations** tab.

1. To add locations, select a location from the **Available** list box and click the > button. To add all of the locations in the list to the request group, click the >> button.
2. To remove locations from the request group, select a location from the **Selected** list box and click the < button. To remove all locations from the request group, click the << button.
4. Click the **Save** button to save your changes or click the **Cancel** button if you do not want to save your changes.

Result: If saved, the edits have been made and the system returns to the **Circulation - Request Group** workspace.

Deleting a Request Group

Operators may delete request groups. Request groups may be deleted even if they are in use in active requests.

This does not affect active requests, however. For example, if I have a request group with all law library locations and I place a title-level hold on a title. Then I delete that request group. It is still true that only items from the law library are eligible to fill the request.



Procedure 5-28. Deleting a Request Group

Use the following to delete a Request Group.

1. Access the **Circulation - Request Groups** workspace.
 - a. Click **Circulation** in the listbar.
 - b. Click the **Request Groups** button in the Circulation listbar.

Result: The **Circulation - Request Groups** workspace opens.

2. Highlight the Request Group you want to delete and click the **Delete** button.

Result: A message asking for confirmation of the deletion displays (see [Figure 5-129](#)).

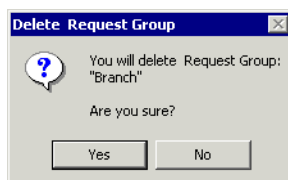


Figure 5-129. Confirmation message before deleting a Request Group

3. Click the **Yes** button to delete this Request Group.

Result: The Request Group is deleted, and no longer displays in the list.

Patron Group Mapping

If your site uses the Universal Borrowing (UB) product, allowing you to participate in Universal Borrowing with a group of Voyager libraries, see the *Voyager Universal Borrowing User's Guide* for information on how to set up Patron Group Mapping in the System Administration module.

If your site contains multiple Circulation Clusters within one database and you want to circulate between clusters, see the *Voyager Circulation Clusters User's Guide* for more information.

NOTE:

If you do not use UB and have a single Circulation Cluster, this feature is not available in Circulation Configuration.

UB Policy Definitions

If your site uses the Universal Borrowing (UB) product, allowing you to participate in Universal Borrowing with a group of Voyager libraries, see the *Voyager Universal Borrowing User's Guide* for information on how to set UB Policy Definitions in the System Administration module.

If your site contains multiple Circulation Clusters within one database and you want to circulate between clusters, see the *Voyager Circulation Clusters User's Guide* for more information.

NOTE:

If you do not use UB and have a single Circulation Cluster, this feature is not available in Circulation Configuration.

Introduction

Library administrators determine the circulation policies for their patrons and for the items in their collections. These policies include numerical limits on specific circulation related activities. When these limits are met or surpassed, any time a circulation transaction is attempted, the transaction is blocked.

Similarly, various circulation rules must also be followed. When a circulation transaction is attempted and a rule is broken, the system blocks the transaction.

The policies and rules for circulation transactions are defined in various places in the System Administration module, and some rules are system defined.

The message indicating a block condition exists displays when a transaction is attempted. It can be seen in the Circulation module; and in some cases in WebVoyage, for example, if the patron is attempting a renewal.

In order for the transaction to continue, either the block condition must be resolved, or an operator with the proper authority must override the block.

The ability to override block conditions are determined in the System Administration module in the security section. However, actually overriding a block condition occurs in the Circulation module.

What are Circulation Blocks

There are two types of blocks as follows:

- One pertaining to patron behavior.
- Another pertaining to the item's disposition.

Therefore, patrons can be blocked from circulation transactions due to patron blocks or item blocks. A patron block typically occurs when the limits defined for the patron group to which the patron belongs are met or surpassed. Item blocks typically occur when a circulation transaction is attempted that is not allowed for the particular item type.

With each circulation transaction, the system checks the appropriate limits or block points that are defined. Block points that are not established are not evaluated. The system evaluates all appropriate limits independently. If more than one block condition arises, all blocks are reported to the circulation operator. The transaction is stopped until the block conditions are resolved or an operator overrides the block.

For example when a charge transaction is attempted, the system performs the following steps:

1. Checks the patron's record to be sure it is valid.
2. Compares the patron's patron record to the various numerical limits which are defined for the patron's patron group.
3. Checks for item-related blocks; if limits are met or surpassed, or a circulation rule is violated, a block condition arises.

NOTE:

If a patron has multiple active patron groups, the active patron group for the charge transaction is the one selected by the circulation operator at charge (the time of the transaction) time.

In addition to charge transactions, blocks can occur when attempting a renewal, making a request, and also at discharge. In all of these cases the circulation transaction is allowed as long as the defined limits are not met or surpassed and other circulation rules are not broken.



IMPORTANT:

If some items in a patron's account place the patron above a block point (for instance, an item type limit) but the specific item being renewed does not (for instance, it belongs to another item type) then the renewal will be allowed.

When a block occurs, an exception number is logged in the CIRC_TRANS_EXCEPTION table. If wanted, users can run the Transactions Exceptions Circulation batch job, Circjob 24. It produces three reports as follows:

- Patron Related Exceptions.
- Item Related Exceptions.
- Transaction Related Exceptions.

For information about Circjob 24 job, see the *Voyager Reporter User's Guide*.

[Table 6-1](#) describes the exception type numbers (as listed in the CIRC_TRANS_EXCEPT_TYPE table) and their descriptions. These numeric codes are found in the CIRC_TRANS_EXCEPTION table.

Table 6-1. Exception Types and Descriptions

Exception Number	Description of Exception
1	Damaged item charged.
2	Withdrawn item charged.
3	Missing item charged.
4	Lost item charged.
5	Claims returned item charged.
6	Bindery item charged.
7	Foreign item charged.
8	Damaged item discharged.
9	Withdrawn item discharged.
10	Missing item discharged.
11	Lost item discharged.
12	Claims returned item discharged.
13	Bindery item discharged.
14	Foreign item discharged.
15	Patron expiration override.
16	Expired address override.
17	Address invalid override.
18	Charged Items limit override.
19	Fine limit override.

Table 6-1. Exception Types and Descriptions

Exception Number	Description of Exception
20	Overdue limit override.
21	Overdue recall limit override.
22	Recall limit override.
23	Claims returned limit override.
24	Lost limit override.
25	Self-shelve limit override.
26	Zero loan period override.
27	Non-Circulating item override.
28	Non-Renewable item override.
29	Renew limit override.
30	Overdue non-renew override.
31	Recalled non-renew override.
32	Hold non-renew override.
33	No courtesy discharge override.
34	Inactive item barcode.
35	Cataloging review
36	Circulation review
37	Scheduled item charged.
38	Scheduled item discharged.
39	In process item charged.
40	In process item discharged.
41	Short loan limit override.
42	Call slip limit override.
43	Short Loan override.
44	Out of phase term renewal.
45	Foreign distribution item charged.
46	Distribution item out of stock.
47	Distribution item not active.
48	Patron suspension override.

Table 6-1. Exception Types and Descriptions

Exception Number	Description of Exception
53	Policy group charge limit override
54	Item type charge limit override
55	Policy Group Item Type charge limit override

Patron Blocks

There are a variety of patron-related blocks. This section discusses each block, where it is defined, the message seen in the Circulation module when it arises, how to resolve the block, and the security privilege needed to override the block.

Patron Expired

The system confirms that the patron's patron record is valid. This is a system-defined block and cannot be changed. The **Expires** field on the **History** tab of the patron record displays the expiration date ([Figure 6-1](#)).

The screenshot shows a web interface for a patron record. At the top, there are tabs: Patron Id, Address/Phone, Counters, Proxy Patrons, and History (which is selected). Below the tabs, there are several input fields and labels:

- Registered: [empty text box]
- Created: 12/17/1999 by: SYSTEM at: [empty text box]
- Updated: 12/17/1999 by: SYSTEM at: [empty text box]
- Expires: 5/21/2003
- Purge: 12/31/2382
- Suspend Until: [empty text box]

Figure 6-1. History Tab, Expires Field

The patron expired block arises when the expiration date is the same as, or prior to, the current date (system date). [Figure 6-2](#) shows the Patron registration expired message seen in the Circulation module for this block.

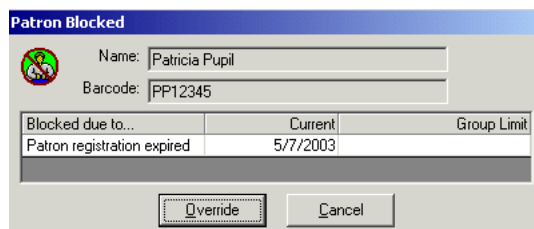


Figure 6-2. Patron Registration Expired Block Message

To resolve this block, operators can edit the expiration date on the patron record ([Figure 6-3](#)). For information on how to edit the patron record, see the *Voyager Circulation User's Guide*.

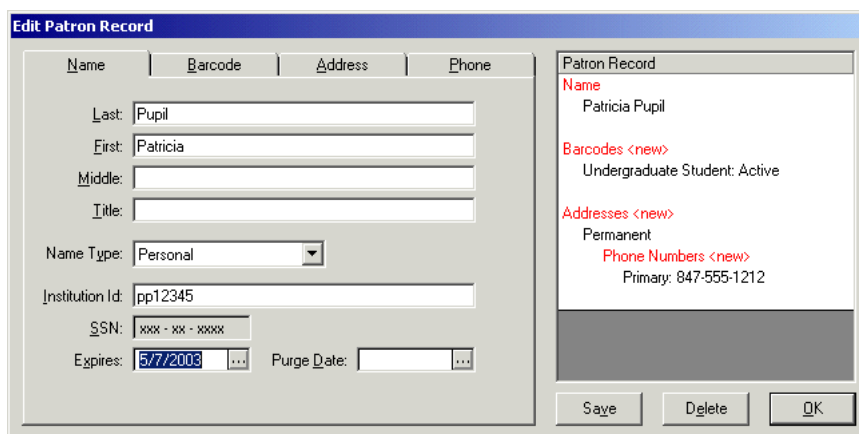
A dialog box titled "Edit Patron Record" with a blue header bar. It has four tabs: "Name", "Barcode", "Address", and "Phone". The "Name" tab is selected. It contains several text fields: "Last: Pupil", "First: Patricia", "Middle:", "Title:", "Name Type: Personal" (with a dropdown arrow), "Institution Id: pp12345", "SSN: XXXX-XX-XXXX", "Expires: 5/7/2003" (with a calendar icon), and "Purge Date:". On the right is a "Patron Record" section with a list of details: "Name: Patricia Pupil", "Barcodes <new>: Undergraduate Student: Active", "Addresses <new>: Permanent", and "Phone Numbers <new>: Primary: 847-555-1212". At the bottom are three buttons: "Save", "Delete", and "OK".

Figure 6-3. Edit Patron Record Dialog Box, Expires Field

To override this block instead of resolving it, the operator must have Patron registration expired in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-4](#)).

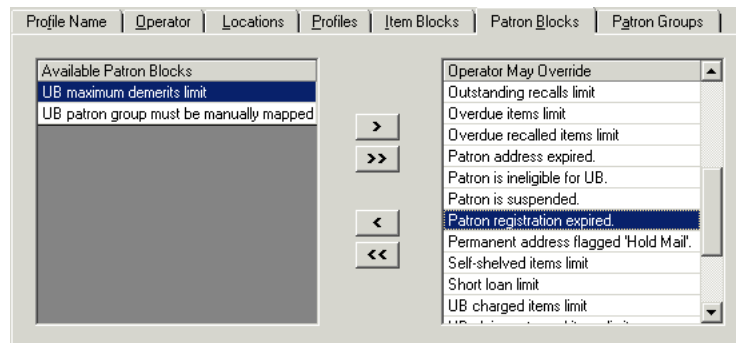


Figure 6-4. Patron Registration Expired Override Ability

Address Invalid

The system determines if the patron's permanent address is valid. This is a system-defined block and cannot be changed. The system checks the **Hold Mail** check box on the **Address** tab of the patron record's permanent address ([Figure 6-5](#)).

Figure 6-5. Address tab, Hold Mail Check Box

The address invalid block arises when the **Hold Mail** check box for the permanent address is selected. [Figure 6-6](#) shows the Permanent Address has been flagged 'Hold Mail' message seen in the Circulation module for this block.

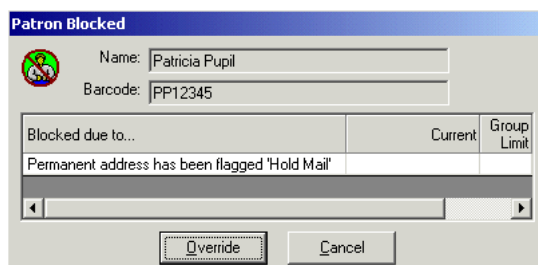


Figure 6-6. Permanent Address has been Flagged 'Hold Mail' Block Message

To resolve this block, clear the **Hold Mail** check box on the patron record ([Figure 6-7](#)). For information on how to edit the patron record, see the *Voyager Circulation User's Guide*.

A screenshot of the 'Edit Patron Record' dialog box. It has tabs for 'Name', 'Barcode', 'Address', and 'Phone'. The 'Name' tab is active. The 'Type' is set to 'Permanent'. There are checkboxes for 'Hold Mail' (which is checked) and 'Protect'. Below these are five lines for the address, with 'Line 1' containing '123 Main St.'. At the bottom are fields for 'City' (DP), 'State/Prov.' (IL), 'Zip/Postal', and 'Country'. On the right is a 'Patron Record' summary box showing the name, barcodes, addresses, and phone numbers. At the bottom right are 'Save', 'Delete', and 'OK' buttons.

Figure 6-7. Edit Patron Record Dialog Box, Hold Mail Check Box

To override this block instead of resolving it, the operator must have Permanent Address flagged 'Hold Mail' in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-8](#)).

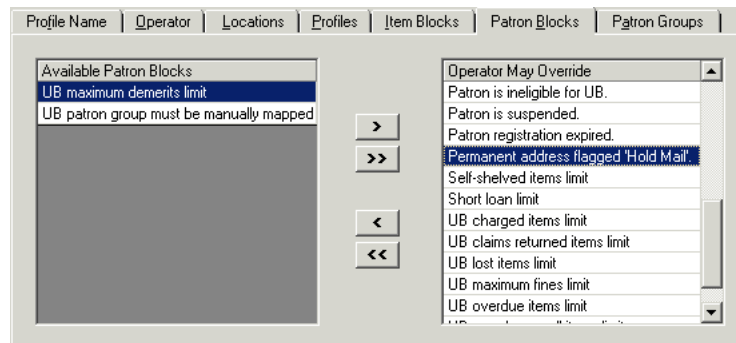


Figure 6-8. Permanent Address flagged 'Hold Mail' Override Ability

Charge Limit (cluster-wide)

The system compares the total number of items the patron has on loan to the cluster-wide borrowing limit for all items. The **Charged items limit for all item types** field on the **Limits** tab of the **Circulation - Patron Groups** workspace for the patron's patron group defines the limit ([Figure 6-9](#)).

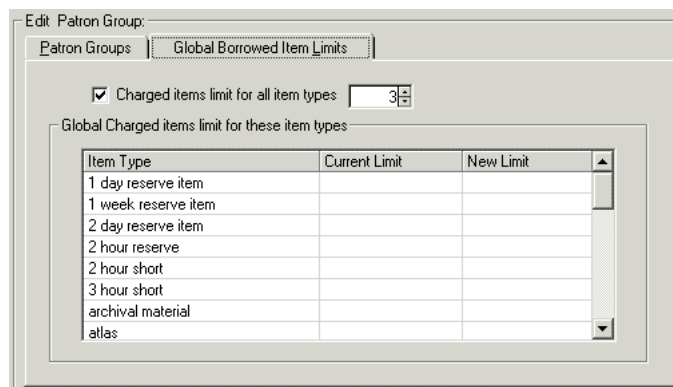


Figure 6-9. Global Borrowed Item Limits Tab, Charged Items Limit for All Item Types Field

The charge item limit block arises when the patron attempts to charge or renew an item, and this limit is surpassed. [Figure 6-10](#) shows the Patron Charge item limit block message seen in the Circulation module for this block.

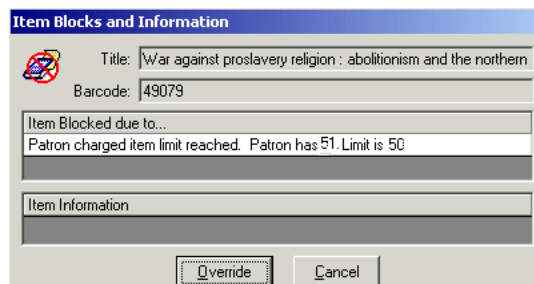


Figure 6-10. Patron Charged Item Limit Reached Block Message

To resolve this block, discharge an item such that the limit is no longer surpassed ([Figure 6-11](#)). For information on how to discharge an item, see the *Voyager Circulation User's Guide, The Discharge Workspace*.

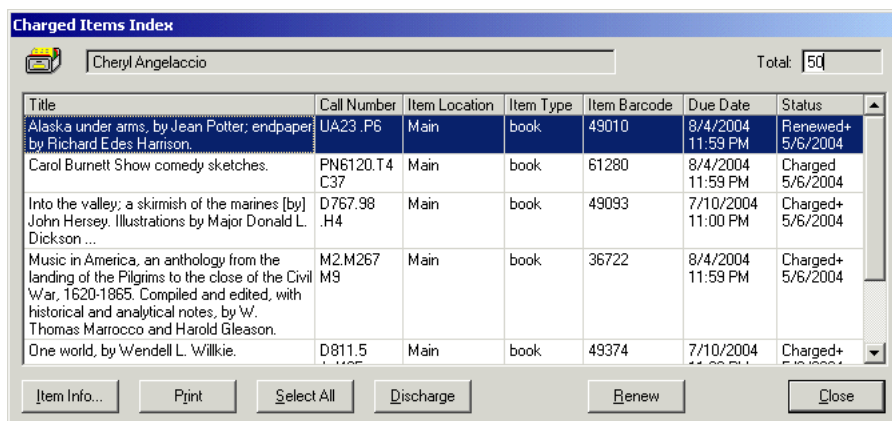


Figure 6-11. Charged Items Index Dialog Box used to Discharge an Item

To override this block instead of resolving it, the operator must have Charged items limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-12](#)).

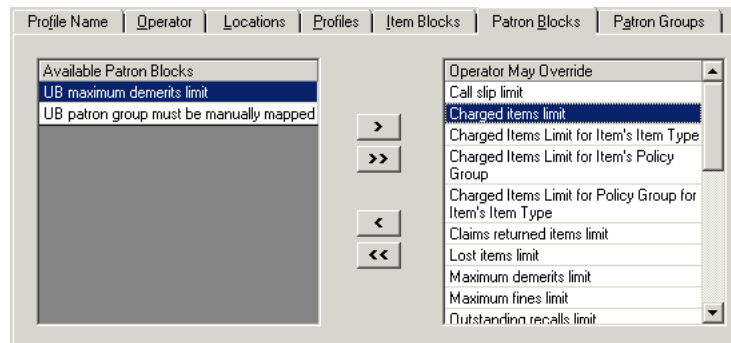


Figure 6-12. Charged Items Limit Override Ability

Charge Limit for Items of a Specific Type (cluster-wide)

The system compares the number of items, which have the same item type (from all policy groups) as the item type of the item to be charged, that the patron has on loan to the cluster-wide borrowing limit for the item's item type. The value in the Item Type-Current Limit cell, on the **Global Borrowed Item Limits** tab of the **Circulation - Patron Groups** workspace for the selected patron group, defines the limit ([Figure 6-13](#)).

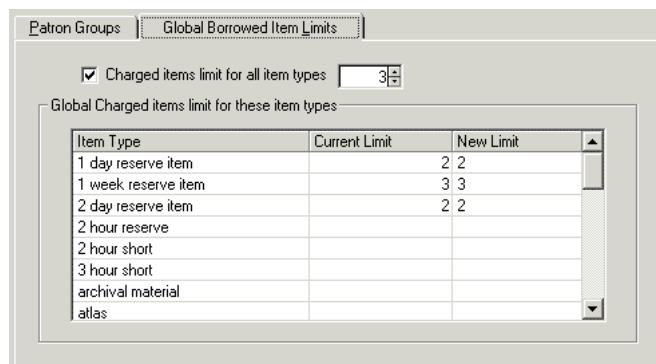


Figure 6-13. Global Borrowed Item Limits Tab, Item Type-Current Limit Cell

The item's item type limit reached block arises when the patron attempts to charge, or renew, an item of a specific type and this limit is surpassed. [Figure 6-14](#) shows the Item's item type limit reached message seen in the Circulation module for this block.

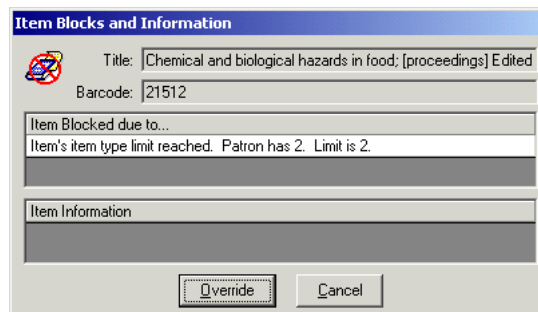


Figure 6-14. Item's Item Type Limit Reached Block Message

To resolve this block, discharge an item of the same item type such that the limit is no longer surpassed ([Figure 6-15](#)). For information on how to discharge an item, see the *Voyager Circulation User's Guide, The Discharge Workspace*.

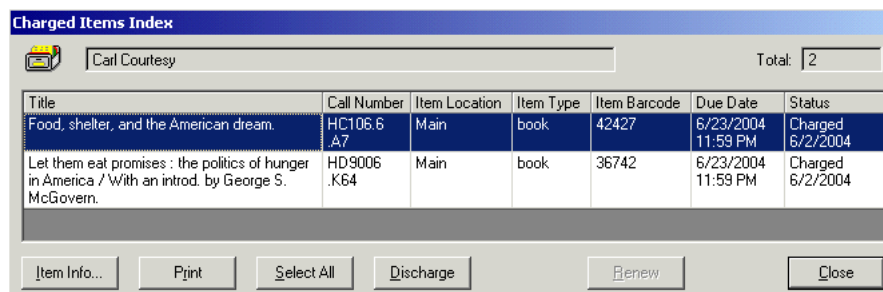


Figure 6-15. Charged Items Index Dialog Box, Used to Discharge an Item

To override this block instead of resolving it, the operator must have Charged Items Limit for Item's Item Type in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-16](#)).

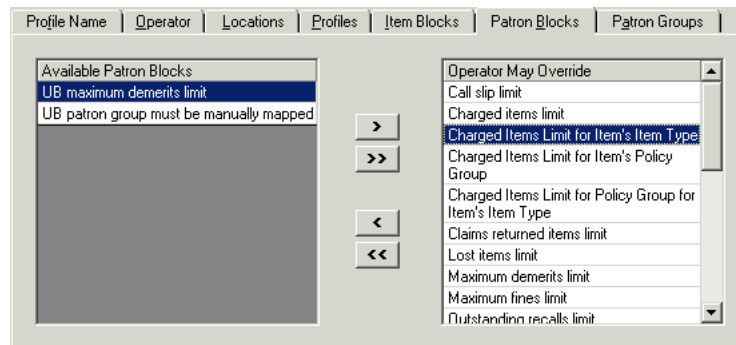


Figure 6-16. Charged Items Limit for Item's Item Type Override Ability

Charge Limit for Items (within the Circulation Policy Group)

The system compares the number of items that belong to the same Circulation Policy Group as the to be charged item, that the patron has on loan to the item's policy groups borrowing limit. The **Max Items Borrowed in this Policy Group** field, on the **Patron Rules** dialog box of the **Patron** tab on the **Circulation - Policy Definitions** workspace defines the limit ([Figure 6-17](#)).

Patron Rules

☒ Fines/Lost Item Fees Apply Max Outstanding Balance: \$50.00 Min Balance For Notice: \$10.00

☒ Courtesy Notice Apply ☒ Overdue Notice Apply

☒ Max Items Borrowed in this Policy Group: 3 ☒ Max Overdue Recalled Items Apply: 3

☒ Max Number Of Recalls Apply: 1 ☒ Max Self-Shelf Returns Apply: 1

☒ Max Claimed Returns Apply: 1 ☒ Max Lost Items Apply: 1

☒ Max Call Slip Requests Apply: 11 ☒ Max Short Loan Apply: 1

☒ Max Short Loan Titles Apply: 6 ☒ Max Short Loan Per Day Apply: 1

☒ Max Overdue Items Apply: 10

☒ Place Holds Using The OPAC ☒ Place Recalls Using The OPAC

☒ Place Short Loans Using The OPAC ☒ Place Call Slip Requests Using The OPAC

☒ Email Courtesy Notices ☒ Email Cancellation Notices ☒ Email Item Available Notices

☒ Email Overdue Notices ☒ Email (Other) Overdue Notices

☒ Email Recall Notices ☒ Email (Other) Recall Notices

OK Cancel

Figure 6-17. Patron Rules Dialog Box, Max Items Borrowed in this Policy Group

The charged items limit for the Item's Policy Group block arises when the patron attempts to charge an item within the item's policy group and this limit is surpassed. Renewal is allowed at the limit, but may not surpass it. [Figure 6-18](#) shows the Patron Charge item limit block message seen in the Circulation module for this block.

Figure 6-18. Item's Policy Group Limit Reached Block Message

To resolve this block, discharge an item from within that policy group such that the limit is no longer surpassed, see [Figure 6-19](#). For information on how to discharge an item, see the *Voyager Circulation User's Guide, The Discharge Workspace*.

Figure 6-19. Charged Items Index dialog box used to discharge an item

To override this block instead of resolving it, the operator must have Charged Items Limit for Item's Policy Group in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-20](#)).

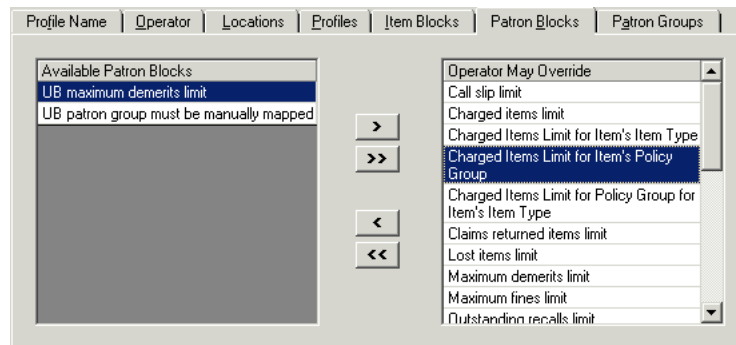


Figure 6-20. Charged Items Limit for Item's Policy Group Override Ability

Charge Limit for Items of a Specific Type (within the Circulation Policy Group)

The system compares the number of items the patron has on loan belonging to the same item type and policy group as the to be charged item is compared to the item's policy group's borrowing limit for the item's item type. The **Max Items Borrowed for this Patron Group & Item Type** field, on the **Circulation Policy Matrix Record Settings** dialog box of the **Matrix** tab on the **Circulation - Policy Definitions** workspace defines the limit ([Figure 6-21](#)).

Circulation Policy Matrix Record Settings

Patron Group: Faculty Item Type: book

Settings Intervals

☒ Charge/Renew ☐ Recall ☐ Hold ☐ Call Slip

Loan Period: 90 Day

Renewal Period: 30 Day

Max # of Sequential Renewals: 2

Fine Interval: Day

Fine Rate: \$0.00

Max Fine Amount: \$100.00

Max Fine for Recalls: \$0.00

Min Loan Period for Recalled Items: 30 Days

Recall Fine Interval: Day

Recall Fine Rate: \$0.00

Grace Period: 5 Days

Recall Return Interval: 10

Recall Grace Period: 3

☒ Max Items Borrowed for this Patron Group & Item Type 3

Renew From: ☐ Original Due Date ☒ Renewal Date

Save Cancel

Figure 6-21. Circulation Policy Matrix Record Settings Dialog Box, Max Items Borrowed for this Patron Group & Item Type

The charged items limit for policy group for item's item type block arises when the patron attempts to charge, or renew, an item of a specific item type (that belongs to the item's circulation policy group) and this limit is surpassed. [Figure 6-22](#) shows the Policy Group limit reached for the item type message seen in the Circulation module for this block.

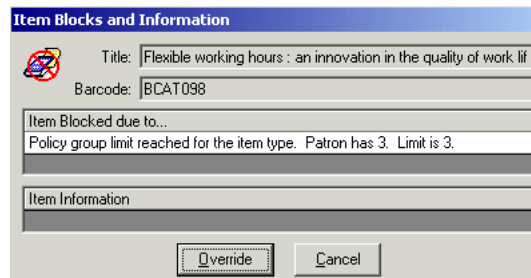


Figure 6-22. Policy Group Limit Reached for the Item Type Block Message

To resolve this block, discharge an item of that type that belongs to the item's circulation policy group such that the limit is no longer surpassed [Figure 6-23](#). For information on how to discharge an item, see the *Voyager Circulation User's Guide, The Discharge Workspace*.

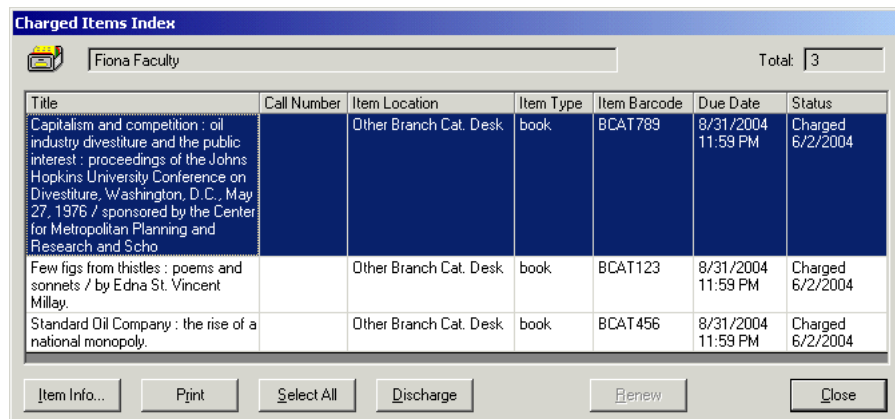


Figure 6-23. Charged Items Index Dialog Box Used to Discharge an Item

To override this block instead of resolving it, the operator must have Charged Items Limit for Item's Policy Group for Item's Item Type in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-24](#)).

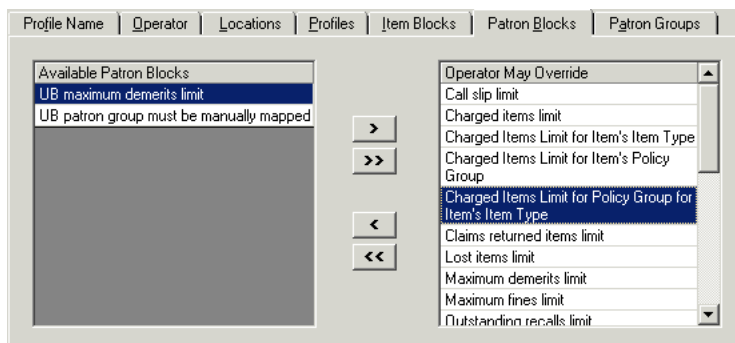


Figure 6-24. Charged Items Limit for Policy Group for Item's Item Type Override Ability

Fine Limit

The system compares the patron's total outstanding fines to the maximum outstanding balance allowed for the patron's patron group. The patron's current outstanding balance displays on the **Patron Fines/Fees** dialog box ([Figure 6-25](#)).

Patron Fines/Fees

\$\$\$ Carl Courtesy

Fines, Fees and Demerits for Location: All Locations

Outstanding Fines/Fees				Fines/Fees History			
Date	Title	Barcode	Fee/Posting Type	Fee	Posting	Balance	Location
6/1/2004 05:42 PM	Feeding frenzy : how attack journalism has transformed American politics / Larry J. Sabato ; with a new afterword.	39748	Overdue	\$20.00		\$20.00	Main
6/1/2004 05:41 PM	Bosses.	49570	Overdue	\$20.00		\$20.00	Main
6/1/2004 05:40 PM			Courtesy Card	\$25.00		\$25.00	Main

Total fines displayed \$75.00

Total Due \$75.00

Figure 6-25. Patron Fines/Fees Dialog Box

The **Max Outstanding Balance** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab for the selected patron group, defines this limit ([Figure 6-26](#)).

Patron Rules

☒ Fines/Lost Item Fees Apply Max Outstanding Balance: \$50.00 Min Balance For Notice: \$10.00

☐ Courtesy Notice Apply ☒ Overdue Notice Apply

☒ Max Items Borrowed in this Policy Group 20 ☒ Max Overdue Recalled Items Apply 2

☒ Max Number Of Recalls Apply 5 ☒ Max Self-Shelf Returns Apply 2

☒ Max Claimed Returns Apply 2 ☒ Max Lost Items Apply 3

☒ Max Call Slip Requests Apply 3 ☒ Max Short Loan Apply 2

☒ Max Short Loan Titles Apply 2 ☒ Max Short Loan Per Day Apply 1

☒ Max Overdue Items Apply 5

☒ Place Holds Using The OPAC ☒ Place Recalls Using The OPAC

☒ Place Short Loans Using The OPAC ☒ Place Call Slip Requests Using The OPAC

☐ Email Courtesy Notices ☒ Email Cancellation Notices ☐ Email Item Available Notices

☒ Email Overdue Notices ☒ Email (Other) Overdue Notices

☒ Email Recall Notices ☒ Email (Other) Recall Notices

OK Cancel

Figure 6-26. Patron Rules Dialog Box, Max Outstanding Balance Field

The maximum fines limit block arises when the patron attempts to charge, renew, or request an item, and their current outstanding fine/fee balance surpasses the limit. [Figure 6-27](#) shows the Maximum fines limit message seen in the Circulation module for this block.

Patron Blocked

Name: Carl Courtesy

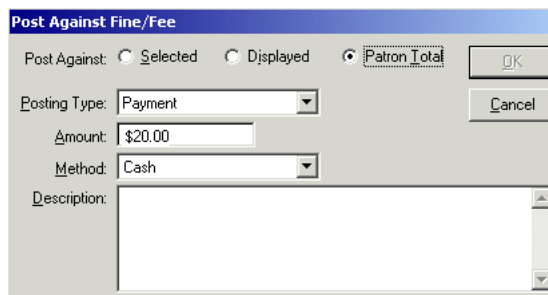
Barcode: CC12345

Blocked due to...	Current	Group Limit
Maximum fines limit	75.00	50.00

Override Cancel

Figure 6-27. Maximum Fines Limit Block Message

To resolve this block, the patron must reduce their outstanding balance, such that the patron's outstanding balance is less than the patron group limit. Use the **Post Against Fines/Fees** dialog box ([Figure 6-28](#)) to reduce the patron's outstanding balance. For information on how to post against a fine or fee, see the *Voyager Circulation User's Guide*.

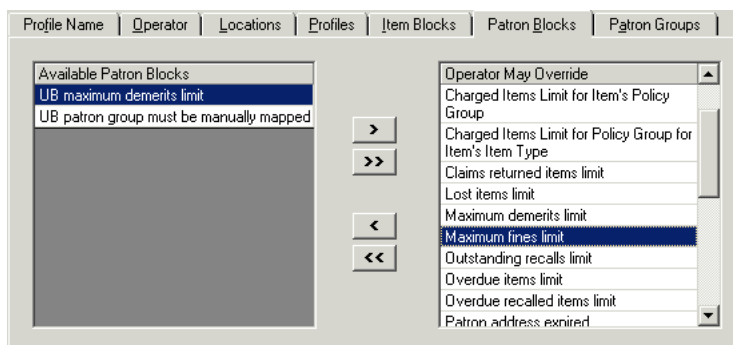


The dialog box is titled "Post Against Fine/Fee". It contains the following fields and controls:

- Post Against:** Three radio buttons: "Selected", "Displayed", and "Patron Total". The "Patron Total" button is selected.
- Posting Type:** A dropdown menu with "Payment" selected.
- Amount:** A text field containing "\$20.00".
- Method:** A dropdown menu with "Cash" selected.
- Description:** A large text area for additional notes.
- Buttons:** "OK" and "Cancel" buttons are located in the top right corner.

Figure 6-28. Post Against Fines/Fees Dialog Box

To override this block instead of resolving it, the operator must have **Maximum Fines limit** selected in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-29](#)).



The dialog box shows the "Patron Blocks" tab. It has a list of "Available Patron Blocks" on the left and a list of "Operator May Override" on the right. The "Maximum fines limit" is selected in the "Operator May Override" list.

Available Patron Blocks	Operator May Override
UB maximum demerits limit	Charged Items Limit for Item's Policy Group
UB patron group must be manually mapped	Charged Items Limit for Policy Group for Item's Item Type
	Claims returned items limit
	Lost items limit
	Maximum demerits limit
	Maximum fines limit
	Outstanding recalls limit
	Overdue items limit
	Overdue recalled items limit
	Patron address expired

Figure 6-29. Maximum Fines Limit Override Ability

Overdue Limit

The system compares the current number of overdue items to the patron's patron group limit. The **Max Overdue Items** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab for the selected patron group defines the limit ([Figure 6-30](#)).

Patron Rules

☒ Fines/Lost Item Fees Apply Max Outstanding Balance: \$50.00 Min Balance For Notice: \$10.00

☐ Courtesy Notice Apply ☒ Overdue Notice Apply

☒ Max Items Borrowed in this Policy Group 20 ☒ Max Overdue Recalled Items Apply 2

☒ Max Number Of Recalls Apply 5 ☒ Max Self-Shelf Returns Apply 2

☒ Max Claimed Returns Apply 2 ☒ Max Lost Items Apply 3

☒ Max Call Slip Requests Apply 3 ☒ Max Short Loan Apply 2

☒ Max Short Loan Titles Apply 2 ☒ Max Short Loan Per Day Apply 1

☒ Max Overdue Items Apply 5

☒ Place Holds Using The OPAC ☒ Place Recalls Using The OPAC

☒ Place Short Loans Using The OPAC ☒ Place Call Slip Requests Using The OPAC

☐ Email Courtesy Notices ☒ Email Cancellation Notices ☐ Email Item Available Notices

☒ Email Overdue Notices ☒ Email (Other) Overdue Notices

☒ Email Recall Notices ☒ Email (Other) Recall Notices

OK Cancel

Figure 6-30. Patron Rules Dialog Box, Max Overdue Items Apply Numerical Limit

The maximum overdue limit block arises when the patron attempts to charge or renew an item and this limit is surpassed. [Figure 6-31](#) shows the Overdue items limit message seen in the Circulation module for this block.

Patron Blocked

Name: Patricia Pupil

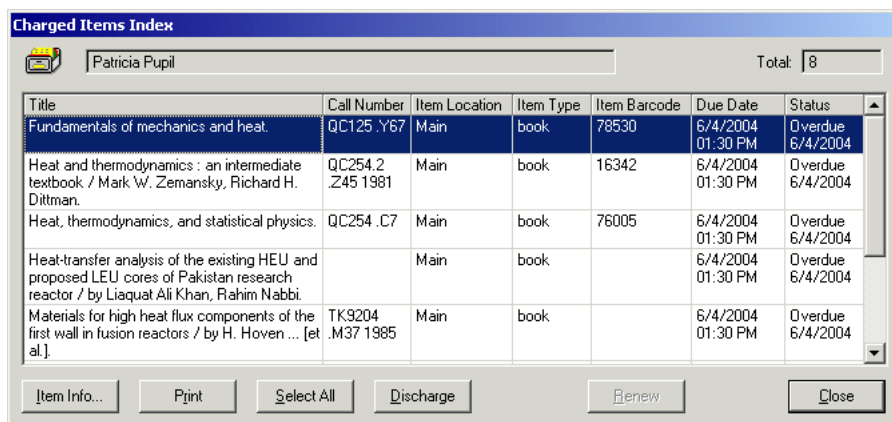
Barcode: PP12345

Blocked due to...	Current	Group Limit
Overdue items limit	6	5

Override Cancel

Figure 6-31. Overdue Items Limit Block Message

To resolve this block, the patron must discharge an overdue item such that the patron's current number of overdue items is less than the patron group limit. Use the **Charged Items Index** dialog box ([Figure 6-32](#)) to discharge a patron's overdue item. For information on how to discharge an item, see the *Voyager Circulation User's Guide*.

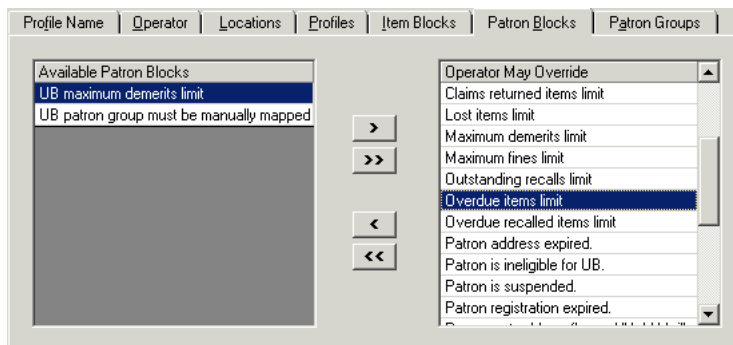


The "Charged Items Index" dialog box displays a table of charged items for the user "Patricia Pupil". The table has columns for Title, Call Number, Item Location, Item Type, Item Barcode, Due Date, and Status. There are 8 items in total, all of which are overdue as of 6/4/2004. Below the table are buttons for "Item Info...", "Print", "Select All", "Discharge", "Renew", and "Close".

Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Fundamentals of mechanics and heat.	QC125 .Y67	Main	book	78530	6/4/2004 01:30 PM	Overdue 6/4/2004
Heat and thermodynamics : an intermediate textbook / Mark W. Zemansky, Richard H. Dittman.	QC254.2 Z45 1981	Main	book	16342	6/4/2004 01:30 PM	Overdue 6/4/2004
Heat, thermodynamics, and statistical physics.	QC254 .C7	Main	book	76005	6/4/2004 01:30 PM	Overdue 6/4/2004
Heat-transfer analysis of the existing HEU and proposed LEU cores of Pakistan research reactor / by Liaquat Ali Khan, Rahim Nabbi.		Main	book		6/4/2004 01:30 PM	Overdue 6/4/2004
Materials for high heat flux components of the first wall in fusion reactors / by H. Hoven ... [et al.].	TK9204 .M37 1985	Main	book		6/4/2004 01:30 PM	Overdue 6/4/2004

Figure 6-32. Charged Items Index Dialog Box Used to Discharge an Overdue Item

To override this block instead of resolving it, the operator must have **Overdue items limit** in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-33](#)).



The "Patron Blocks" dialog box shows the "Operator May Override" column selected. The "Available Patron Blocks" list on the left includes "UB maximum demerits limit" and "UB patron group must be manually mapped". The "Operator May Override" list on the right includes "Claims returned items limit", "Lost items limit", "Maximum demerits limit", "Maximum fines limit", "Outstanding recalls limit", "Overdue items limit" (which is highlighted), "Overdue recalled items limit", "Patron address expired", "Patron is ineligible for UB", "Patron is suspended", and "Patron registration expired".

Figure 6-33. Overdue Items Limit Override Ability

Overdue Recall Limit

The system compares the current number of overdue items that have pending recall requests to the patron's patron group limit. The **Max Overdue Recall Items** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab for the selected patron group, defines the limit ([Figure 6-34](#)).

Patron Rules

☒ Fines/Lost Item Fees Apply Max Outstanding Balance: \$50.00 Min Balance For Notice: \$10.00

☐ Courtesy Notice Apply ☒ Overdue Notice Apply

☒ Max Items Borrowed in this Policy Group 20 ☒ Max Overdue Recalled Items Apply 2

☒ Max Number Of Recalls Apply 5 ☒ Max Self-Shelf Returns Apply 2

☒ Max Claimed Returns Apply 2 ☒ Max Lost Items Apply 3

☒ Max Call Slip Requests Apply 3 ☒ Max Short Loan Apply 2

☒ Max Short Loan Titles Apply 2 ☒ Max Short Loan Per Day Apply 1

☒ Max Overdue Items Apply 5

☒ Place Holds Using The OPAC ☒ Place Recalls Using The OPAC

☒ Place Short Loans Using The OPAC ☒ Place Call Slip Requests Using The OPAC

☐ Email Courtesy Notices ☒ Email Cancellation Notices ☐ Email Item Available Notices

☒ Email Overdue Notices ☒ Email (Other) Overdue Notices

☒ Email Recall Notices ☒ Email (Other) Recall Notices

OK Cancel

Figure 6-34. Patron Rules Dialog Box, Max Overdue Items Numerical Limit

The maximum overdue recall limit block arises when the patron attempts to charge or renew an item and their current number of overdue recalled items surpasses the limit. [Figure 6-35](#) shows the Overdue recall items limit message seen in the Circulation module for this block.

Patron Blocked

Name: Carla Courtesy-Patron

Barcode: CCP123

Blocked due to...	Current	Group Limit
Overdue recalled items limit	1	1

Override Cancel

Figure 6-35. Patron Overdue Recall Items Limit Block Message

To resolve this block, the patron must discharge an overdue item that has a pending recall request such that the patron's current number of overdue items with recall requests is less than the patron group limit. Use the **Charged Items Index** dialog box ([Figure 6-32](#)) to discharge a patron's overdue item. For information on how to discharge an item, see the *Voyager Circulation User's Guide*.

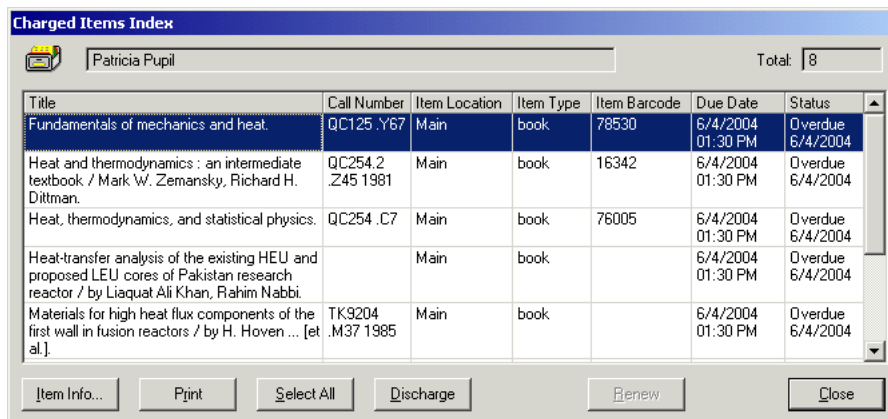


Figure 6-36. Charged Items Index Dialog Box Used to Discharge an Item

To override this block instead of resolving it, the operator must have Overdue recalled items limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-37](#)).

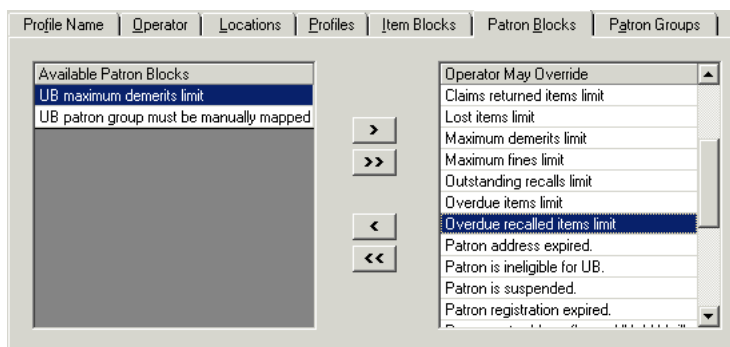


Figure 6-37. Overdue Recalled Items Limit Override Ability

Recall Limit

The system compares the patron's current number of pending recalls to the patron's patron group limit. The **Patron Request Information** dialog box displays the current number of recalls ([Figure 6-38](#))

Patron Request Information

Patricia Pupill

Holds and Recalls Call Slips Short Loans

Requests Pending:

Title	Barcode	Expires	Type	Rank
Miami and the siege of Chicago: an informal history of the Republican and Democratic Conventions of 1968.	30535	6/12/2004	R	1
Open form; essays for our time.	27162	6/12/2004	R	1

Items Available for Pickup:

Title	Barcode	Expires	Type	Pickup Location

Print Cancel Charge Close

Figure 6-38. Patron Request Information Dialog Box, Holds and Recalls Tab

The **Max Number of Recalls** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab, defines the limit for the selected patron group ([Figure 6-39](#)).

Patron Rules

☒ Fines/Lost Item Fees Apply Max Outstanding Balance: \$25.00 Min Balance For Notice: \$5.00

☐ Courtesy Notice Apply ☒ Overdue Notice Apply

☒ Max Items Borrowed in this Policy Group 25 ☒ Max Overdue Recalled Items Apply 2

☒ Max Number Of Recalls Apply 2 ☒ Max Self-Shelf Returns Apply 3

☒ Max Claimed Returns Apply 2 ☒ Max Lost Items Apply 2

☒ Max Call Slip Requests Apply 2 ☒ Max Short Loan Apply 2

☐ Max Short Loan Titles Apply ☐ Max Short Loan Per Day Apply

☒ Max Overdue Items Apply 3

☒ Place Holds Using The OPAC ☒ Place Recalls Using The OPAC

☒ Place Short Loans Using The OPAC ☒ Place Call Slip Requests Using The OPAC

☐ Email Courtesy Notices ☐ Email Cancellation Notices ☐ Email Item Available Notices

☐ Email Overdue Notices ☐ Email (Other) Overdue Notices

☐ Email Recall Notices ☐ Email (Other) Recall Notices

OK Cancel

Figure 6-39. Patron Rules Dialog Box, Max Number of Recalls Numerical Limit

The outstanding recall limit block arises when the patron attempts to renew an item and the limit is surpassed. [Figure 6-40](#) shows the Outstanding recalls limit message seen in the Circulation module for this block.

Patron Blocked

Name: Patricia Pupil

Barcode: PP12345

Blocked due to...	Current	Group Limit
Outstanding recalls limit	2	2

Override Cancel

Figure 6-40. Outstanding Recalls Limit Block Message

To resolve this block, the patron must cancel a recall such that the patron's current number of recall requests is less than the patron group limit. Use the **Patron Request Information** dialog box ([Figure 6-41](#)) to cancel a patron's recall request. For information on how to cancel a recall request, see the *Voyager Circulation User's Guide*.

Patron Request Information

Patricia Pupil

Holds and Recalls | Call Slips | Short Loans

Requests Pending:

Title	Barcode	Expires	Type	Rank
Miami and the siege of Chicago; an informal history of the Republican and Democratic Conventions of 1968.	30535	6/12/2004	R	1
Open form; essays for our time.	27162	6/12/2004	R	1

Items Available for Pickup:

Title	Barcode	Expires	Type	Pickup Location

Print Cancel Charge Close

Figure 6-41. Patron Request Information Dialog Box

To override this block instead of resolving it, the operator must have Outstanding recalls items limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-42](#)).

Profile Name | Operator | Locations | Profiles | Item Blocks | Patron Blocks | Patron Groups

Available Patron Blocks

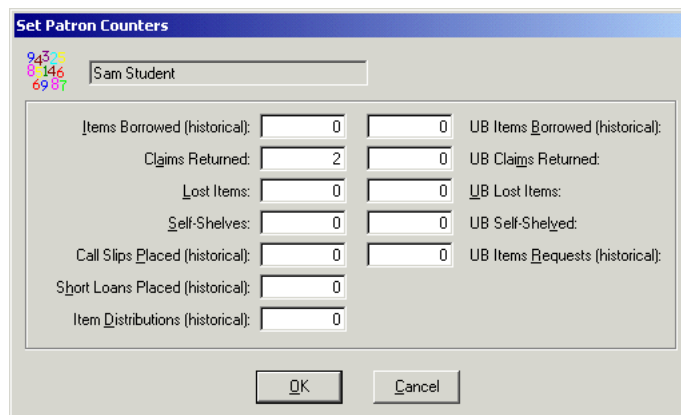
Operator May Override

- Call slip limit
- Charged items limit
- Claims returned items limit
- Lost items limit
- Maximum demerits limit
- Maximum fines limit
- Outstanding recalls limit**
- Overdue items limit
- Overdue recalled items limit
- Patron address expired.
- Patron is ineligible for UB.

Figure 6-42. Outstanding Recalls Items Limit Override Ability

Claims Returned Limit

The system compares the number of times the patron has claimed they returned an item to the limit for the patron's patron group. To determine the number of items that the patron has claimed to return, see the **Claims Returned** field on the patron's **Counters** dialog box ([Figure 6-43](#))



The dialog box titled "Set Patron Counters" for the patron "Sam Student" contains the following fields:

Field	Value
Items Borrowed (historical):	0
Claims Returned:	2
Lost Items:	0
Self-Shelves:	0
Call Slips Placed (historical):	0
Short Loans Placed (historical):	0
Item Distributions (historical):	0
UB Items Borrowed (historical):	0
UB Claims Returned:	0
UB Lost Items:	0
UB Self-Shelved:	0
UB Items Requests (historical):	0

Buttons: OK, Cancel

Figure 6-43. Patron Record Claims Returned

The **Max Claimed Returns** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab for the selected patron group, defines the limit ([Figure 6-44](#)).

Patron Rules

☒ Fines/Lost Item Fees Apply Max Outstanding Balance: \$25.00 Min Balance For Notice: \$5.00

☐ Courtesy Notice Apply ☒ Overdue Notice Apply

☒ Max Items Borrowed in this Policy Group 25 ☒ Max Overdue Recalled Items Apply 2

☒ Max Number Of Recalls Apply 3 ☒ Max Self-Shelf Returns Apply 3

☒ Max Claimed Returns Apply 2 ☒ Max Lost Items Apply 2

☒ Max Call Slip Requests Apply 2 ☒ Max Short Loan Apply 2

☐ Max Short Loan Titles Apply ☐ Max Short Loan Per Day Apply

☒ Max Overdue Items Apply 3

☒ Place Holds Using The OPAC ☒ Place Recalls Using The OPAC

☒ Place Short Loans Using The OPAC ☒ Place Call Slip Requests Using The OPAC

☐ Email Courtesy Notices ☐ Email Cancellation Notices ☐ Email Item Available Notices

☐ Email Overdue Notices ☐ Email (Other) Overdue Notices

☐ Email Recall Notices ☐ Email (Other) Recall Notices

OK Cancel

Figure 6-44. Patron Rules Dialog Box, Max Claimed Returns Numerical Limit

The maximum claims returned limit block arises when the patron attempts to charge or renew an item and the limit is met or surpassed. [Figure 6-45](#) shows the Claim returned limit message seen in the Circulation module for this block.

Patron Blocked

Name: Sam Student

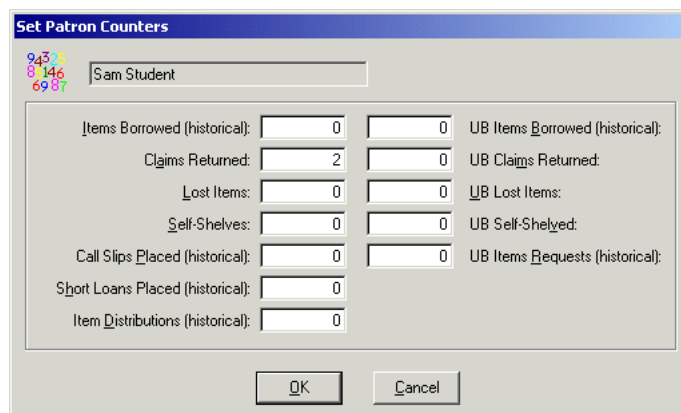
Barcode: SS12345

Blocked due to...	Current	Group Limit
Claim returned limit	2	2

Override Cancel

Figure 6-45. Claim Returned Limit Block Message

To resolve this block, the circulation operator must manually reduce this counter such that it is less than the patron group limit. Use the **Set Patron Counters** dialog box ([Figure 6-46](#)) to manually reduce a patron's counter. For information on how to reduce the counter, see the *Voyager Circulation User's Guide*.



Set Patron Counters

94325
67146
6987

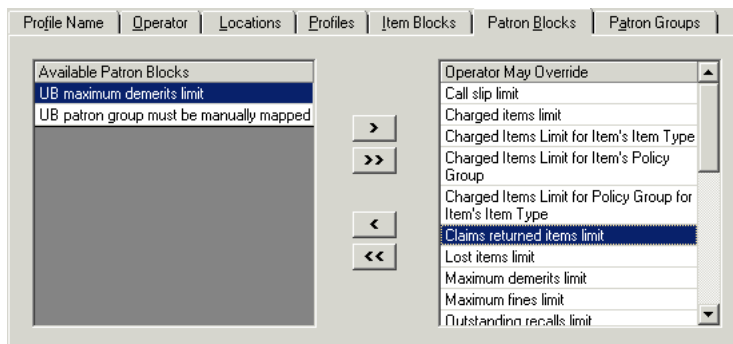
Sam Student

Items Borrowed (historical):	0	0	UB Items Borrowed (historical):
Claims Returned:	2	0	UB Claims Returned:
Lost Items:	0	0	UB Lost Items:
Self-Shelves:	0	0	UB Self-Shelved:
Call Slips Placed (historical):	0	0	UB Items Requests (historical):
Short Loans Placed (historical):	0		
Item Distributions (historical):	0		

OK Cancel

Figure 6-46. Set Patron Counters Dialog Box

To override this block instead of resolving it, the operator must have Claims returned items limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-47](#)).



Profile Name | Operator | Locations | Profiles | Item Blocks | Patron Blocks | Patron Groups

Available Patron Blocks

- UB maximum demerits limit
- UB patron group must be manually mapped

> >> < <<

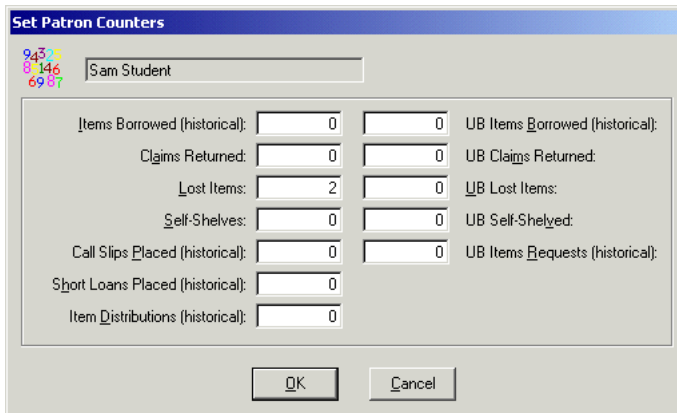
Operator May Override

- Call slip limit
- Charged items limit
- Charged Items Limit for Item's Item Type
- Charged Items Limit for Item's Policy Group
- Charged Items Limit for Policy Group for Item's Item Type
- Claims returned items limit**
- Lost items limit
- Maximum demerits limit
- Maximum fines limit
- Outstanding recalls limit

Figure 6-47. Claims Returned Items Limit Override Ability

Lost Limit

The system compares the number of items the patron has lost to the limit for the patron's patron group. To determine the number of lost items, access the **Lost Items** field on the patron's **Counters** dialog box ([Figure 6-48](#)).



Set Patron Counters

94325
67146
6987

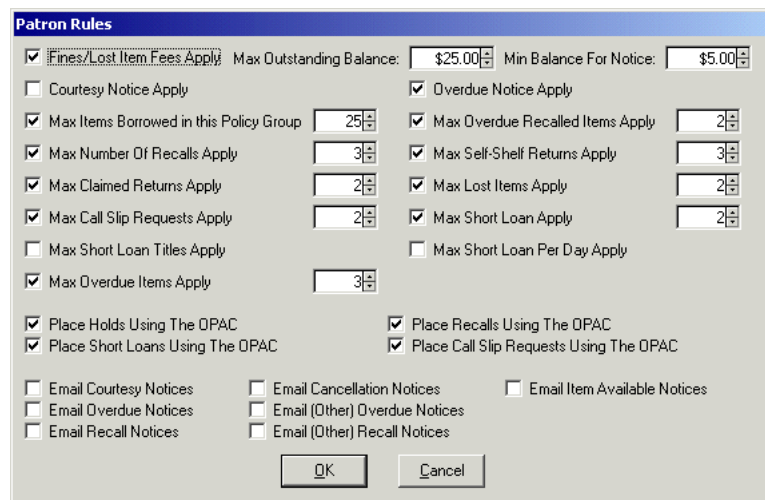
Sam Student

Items Borrowed (historical):	0	0	UB Items Borrowed (historical):
Claims Returned:	0	0	UB Claims Returned:
Lost Items:	2	0	UB Lost Items:
Self-Shelves:	0	0	UB Self-Shelved:
Call Slips Placed (historical):	0	0	UB Items Requests (historical):
Short Loans Placed (historical):	0		
Item Distributions (historical):	0		

OK Cancel

Figure 6-48. Patron Record Lost Items

The **Max Lost Items** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab, defines the limit for the selected patron group ([Figure 6-49](#)).



Patron Rules

☒ Fines/Lost Item Fees Apply Max Outstanding Balance: Min Balance For Notice:

☐ Courtesy Notice Apply ☒ Overdue Notice Apply

☒ Max Items Borrowed in this Policy Group ☒ Max Overdue Recalled Items Apply

☒ Max Number Of Recalls Apply ☒ Max Self-Shelf Returns Apply

☒ Max Claimed Returns Apply ☒ Max Lost Items Apply

☒ Max Call Slip Requests Apply ☒ Max Short Loan Apply

☐ Max Short Loan Titles Apply ☐ Max Short Loan Per Day Apply

☒ Max Overdue Items Apply

☒ Place Holds Using The OPAC ☒ Place Recalls Using The OPAC

☒ Place Short Loans Using The OPAC ☒ Place Call Slip Requests Using The OPAC

☐ Email Courtesy Notices ☐ Email Cancellation Notices ☐ Email Item Available Notices

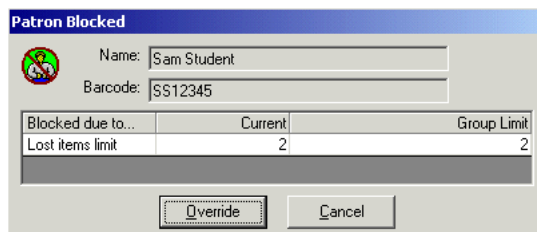
☐ Email Overdue Notices ☐ Email (Other) Overdue Notices

☐ Email Recall Notices ☐ Email (Other) Recall Notices

OK Cancel

Figure 6-49. Patron Rules Dialog Box, Max Lost Items Numerical Limit

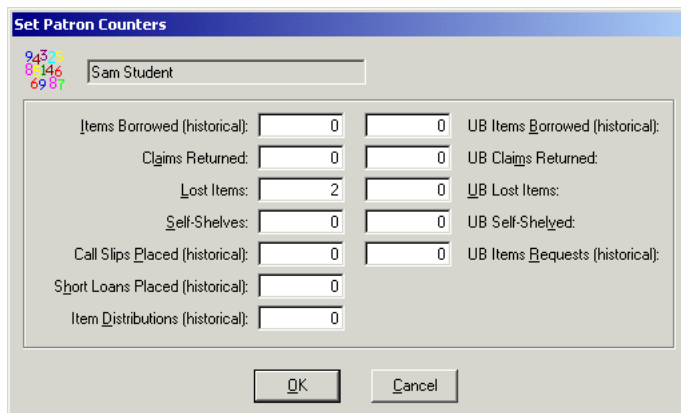
The maximum lost items limit block arises when the patron attempts to charge or renew an item, and the number of items they have lost meets or surpasses the limit. [Figure 6-50](#) shows the Lost items limit message seen in the Circulation module for this block.

A dialog box titled "Patron Blocked" with a blue header bar. It contains a small icon of a person with a red X over their head. Below the icon are two text fields: "Name: Sam Student" and "Barcode: SS12345". Below these is a table with three columns: "Blocked due to...", "Current", and "Group Limit". The table has one row: "Lost items limit", "2", and "2". At the bottom are two buttons: "Override" and "Cancel".

Blocked due to...	Current	Group Limit
Lost items limit	2	2

Figure 6-50. Lost Items Limit Block Message

To resolve this block, the circulation operator must manually reduce this counter such that it is less than the patron group limit. Use the **Set Patron Counters** dialog box ([Figure 6-51](#)) to manually reduce the patron's counter. For information on how to reduce the counter, see the *Voyager Circulation User's Guide*.

A dialog box titled "Set Patron Counters" with a blue header bar. It contains a small icon of a person with a red X over their head. Below the icon is a text field: "Sam Student". Below this is a table with two columns. The left column has six rows: "Items Borrowed (historical):", "Claims Returned:", "Lost Items:", "Self-Shelves:", "Call Slips Placed (historical):", and "Short Loans Placed (historical):". The right column has six rows: "UB Items Borrowed (historical):", "UB Claims Returned:", "UB Lost Items:", "UB Self-Shelved:", "UB Items Requests (historical):", and "Item Distributions (historical):". Each row has two input fields. At the bottom are two buttons: "OK" and "Cancel".

Items Borrowed (historical):	0	0	UB Items Borrowed (historical):
Claims Returned:	0	0	UB Claims Returned:
Lost Items:	2	0	UB Lost Items:
Self-Shelves:	0	0	UB Self-Shelved:
Call Slips Placed (historical):	0	0	UB Items Requests (historical):
Short Loans Placed (historical):	0	0	Item Distributions (historical):

Figure 6-51. Set Patron Counters Dialog Box

To override this block instead of resolving it, the operator must have Lost items limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-52](#)).

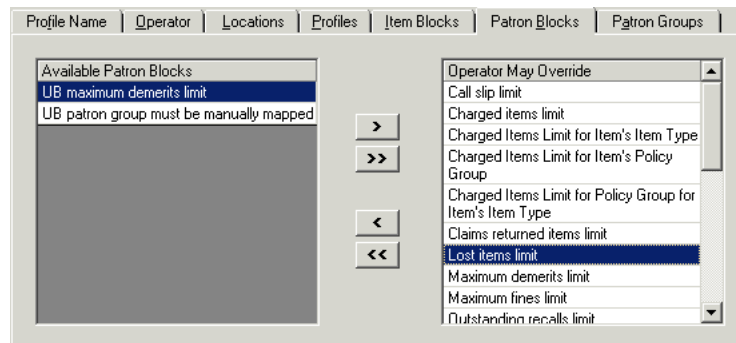


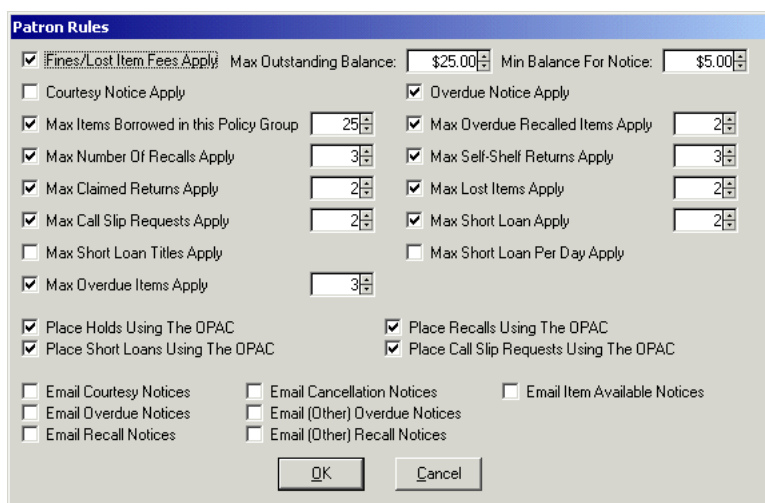
Figure 6-52. Lost Items Limit Override Ability

Self-Shelved Limit

The system compares the number of items the patron has shelved an item without discharging to the limit for the patron's patron group. To determine the number of self-shelved items, access the **Self-Shelves** field, on the patron's **Counters** dialog box ([Figure 6-53](#))

Figure 6-53. Patron Record Self Shelves

The **Max Self-Shelf Returns** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab, defines the limit for the selected patron group ([Figure 6-54](#)).



Patron Rules

☒ Fines/Lost Item Fees Apply Max Outstanding Balance: \$25.00 Min Balance For Notice: \$5.00

☐ Courtesy Notice Apply ☒ Overdue Notice Apply

☒ Max Items Borrowed in this Policy Group 25 ☒ Max Overdue Recalled Items Apply 2

☒ Max Number Of Recalls Apply 3 ☒ Max Self-Shelf Returns Apply 3

☒ Max Claimed Returns Apply 2 ☒ Max Lost Items Apply 2

☒ Max Call Slip Requests Apply 2 ☒ Max Short Loan Apply 2

☐ Max Short Loan Titles Apply ☐ Max Short Loan Per Day Apply

☒ Max Overdue Items Apply 3

☒ Place Holds Using The OPAC ☒ Place Recalls Using The OPAC

☒ Place Short Loans Using The OPAC ☒ Place Call Slip Requests Using The OPAC

☐ Email Courtesy Notices ☐ Email Cancellation Notices ☐ Email Item Available Notices

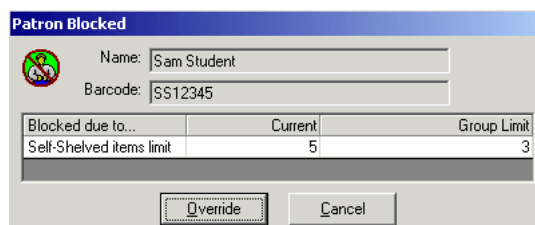
☐ Email Overdue Notices ☐ Email (Other) Overdue Notices

☐ Email Recall Notices ☐ Email (Other) Recall Notices

OK Cancel

Figure 6-54. Patron Rules Dialog Box, Max Self-Shelves Returns

The self-shelved limit block arises when the patron attempts to charge or renew an item and the number of items they have self-shelved meets or surpasses the limit. [Figure 6-55](#) shows the Self-Shelved items limit message seen in the Circulation module for this block.



Patron Blocked

 Name: Sam Student

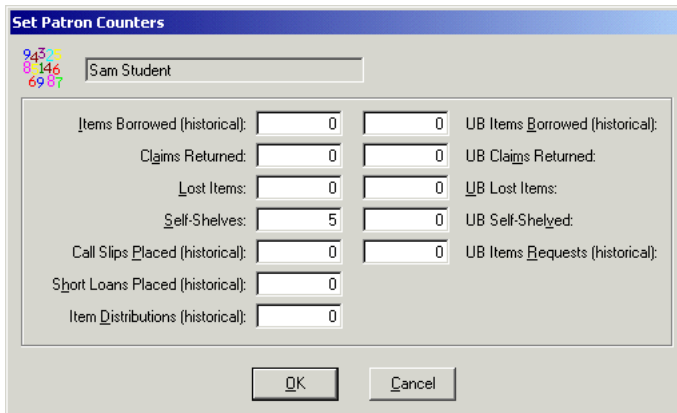
Barcode: SS12345

Blocked due to...	Current	Group Limit
Self-Shelved items limit	5	3

Override Cancel

Figure 6-55. Self-Shelved Items Limit Block Message

To resolve this block, the circulation operator must manually reduce this counter such that it is less than the patron group limit. Use the **Set Patron Counters** dialog box ([Figure 6-56](#)) to manually reduce the patron's counter. For information on how to reduce the counter, see the *Voyager Circulation User's Guide*.



Set Patron Counters

94325
67146
6987

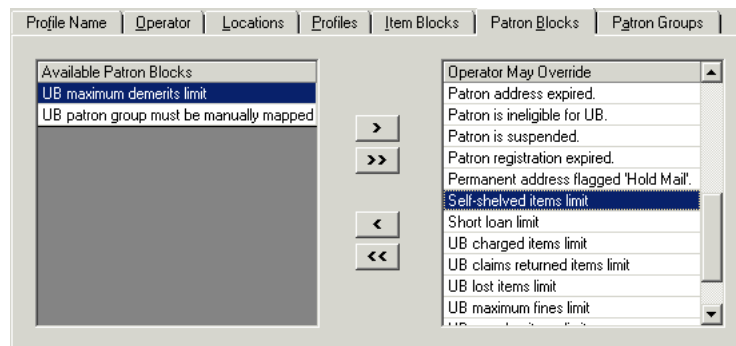
Sam Student

Items Borrowed (historical):	0	0	UB Items Borrowed (historical):
Claims Returned:	0	0	UB Claims Returned:
Lost Items:	0	0	UB Lost Items:
Self-Shelves:	5	0	UB Self-Shelved:
Call Slips Placed (historical):	0	0	UB Items Requests (historical):
Short Loans Placed (historical):	0		
Item Distributions (historical):	0		

OK Cancel

Figure 6-56. Set Patron Counters Dialog Box

To override this block instead of resolving it, the operator must have Self-shelved items limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-57](#)).



Profile Name | Operator | Locations | Profiles | Item Blocks | **Patron Blocks** | Patron Groups

Available Patron Blocks

- UB maximum demerits limit
- UB patron group must be manually mapped

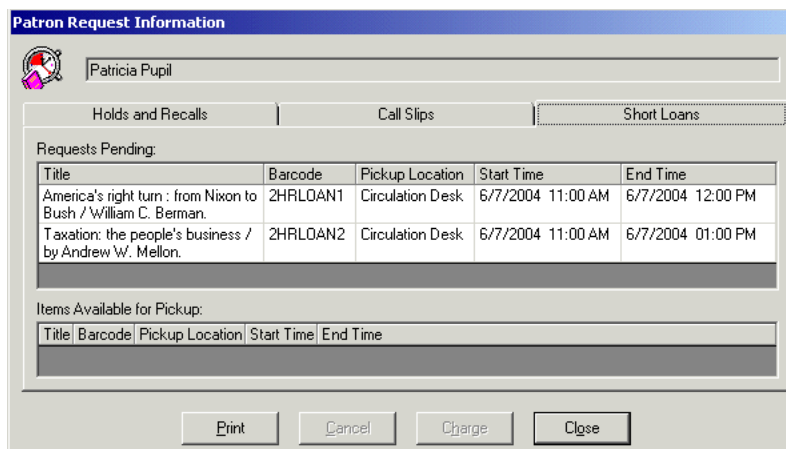
Operator May Override

- Patron address expired.
- Patron is ineligible for UB.
- Patron is suspended.
- Patron registration expired.
- Permanent address flagged 'Hold Mail'.
- Self-shelved items limit**
- Short loan limit
- UB charged items limit
- UB claims returned items limit
- UB lost items limit
- UB maximum fines limit

Figure 6-57. Self-shelved Items Limit Override Ability

Short Loan Limit

The system compares the patron's current number of pending short loans to any of the patron's patron group limits. To determine the number of short loan requests made by the patron, access the **Patron Request Information** dialog box ([Figure 6-58](#)).



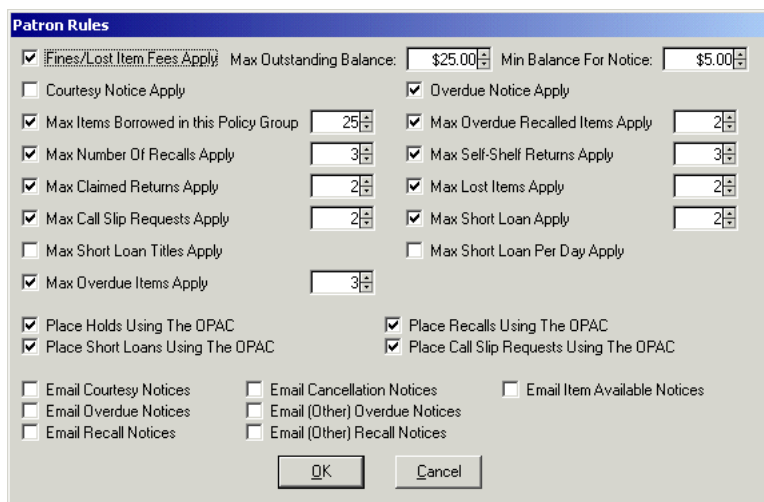
The dialog box is titled "Patron Request Information" and shows the name "Patricia Pupill". It has three tabs: "Holds and Recalls", "Call Slips", and "Short Loans". The "Short Loans" tab is selected. Below the tabs, there is a section "Requests Pending:" with a table showing two requests. Below that is a section "Items Available for Pickup:" with an empty table. At the bottom are buttons for "Print", "Cancel", "Charge", and "Close".

Title	Barcode	Pickup Location	Start Time	End Time
America's right turn : from Nixon to Bush / William C. Berman.	2HRLOAN1	Circulation Desk	6/7/2004 11:00 AM	6/7/2004 12:00 PM
Taxation: the people's business / by Andrew W. Mellon.	2HRLOAN2	Circulation Desk	6/7/2004 11:00 AM	6/7/2004 01:00 PM

Title	Barcode	Pickup Location	Start Time	End Time

Figure 6-58. Patron Request Information Dialog Box, Short Loans Tab

For the selected patron group ([Figure 6-59](#)), the limits for short loans are defined in the **Max Short Loan Apply**, **Max Short Loan Titles Apply**, and **Max Short Loan per Day Apply** fields, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab.



The dialog box is titled "Patron Rules". It contains various settings for patron rules. The "Fines/Lost Item Fees Apply" checkbox is checked, with "Max Outstanding Balance" set to \$25.00 and "Min Balance For Notice" set to \$5.00. The "Courtesy Notice Apply" checkbox is unchecked. The "Overdue Notice Apply" checkbox is checked. The "Max Items Borrowed in this Policy Group" is set to 25. The "Max Number Of Recalls Apply" is set to 3. The "Max Claimed Returns Apply" is set to 2. The "Max Call Slip Requests Apply" is set to 2. The "Max Short Loan Titles Apply" is set to 2. The "Max Overdue Items Apply" is set to 3. The "Place Holds Using The OPAC" checkbox is checked. The "Place Short Loans Using The OPAC" checkbox is checked. The "Place Recalls Using The OPAC" checkbox is checked. The "Place Call Slip Requests Using The OPAC" checkbox is checked. The "Email Courtesy Notices" checkbox is unchecked. The "Email Overdue Notices" checkbox is unchecked. The "Email Recall Notices" checkbox is unchecked. The "Email Cancellation Notices" checkbox is unchecked. The "Email (Other) Overdue Notices" checkbox is unchecked. The "Email (Other) Recall Notices" checkbox is unchecked. The "Email Item Available Notices" checkbox is unchecked. At the bottom are buttons for "OK" and "Cancel".

Figure 6-59. Patron Rules Dialog Box, Short Loan Numerical Limits

The short loan limit block arises when the patron attempts to request a short loan and the number of short loans meets or surpasses the total of the limits. [Figure 6-60](#) shows the Short loan limit message seen in the Circulation module for this block.

The dialog box titled "Patron Blocked" displays the following information:

- Name: Patricia Pupil
- Barcode: PP12345
- Blocked due to...: Short loan limit
- Current: 2
- Group Limit: 2

Buttons at the bottom: Override, Cancel

Figure 6-60. Short Loan Limit Block Message

To resolve this block, the patron must cancel a short loan such that the patron's current number of requests is less than the patron group limit. Use the **Patron Request Information** dialog box ([Figure 6-61](#)) to reduce the patron's short loan requests. For information on how to cancel a short loan request, see the *Voyager Circulation User's Guide*.

The dialog box titled "Patron Request Information" shows the "Short Loans" tab for Patricia Pupil. It contains the following sections:

- Requests Pending:**

Title	Barcode	Pickup Location	Start Time	End Time
America's right turn : from Nixon to Bush / William C. Berman.	2HRLOAN1	Circulation Desk	6/7/2004 11:00 AM	6/7/2004 12:00 PM
Taxation: the people's business / by Andrew W. Mellon.	2HRLOAN2	Circulation Desk	6/7/2004 11:00 AM	6/7/2004 01:00 PM
- Items Available for Pickup:**

Title	Barcode	Pickup Location	Start Time	End Time

Buttons at the bottom: Print, Cancel, Charge, Close

Figure 6-61. Patron Request Information Dialog Box, Short Loans Tab

To override this block instead of resolving it, the operator must have Short loan limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-62](#)).

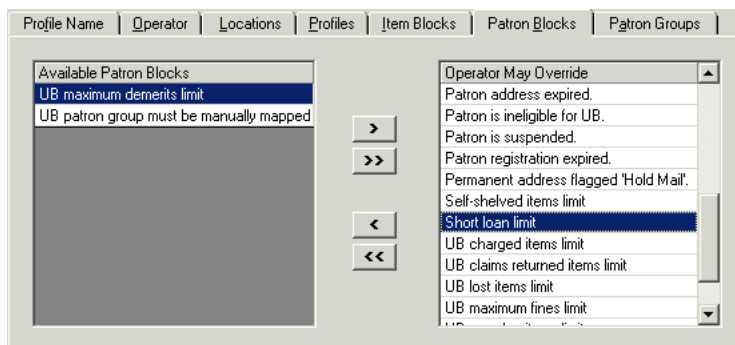


Figure 6-62. Short Loan Limit Override Ability

Callslip Limit

The system compares the patron's current number of pending callslip requests to the patron's patron group limit. To determine the number of callslip requests the patron currently has, access the **Patron Request Information** dialog box ([Figure 6-63](#)).

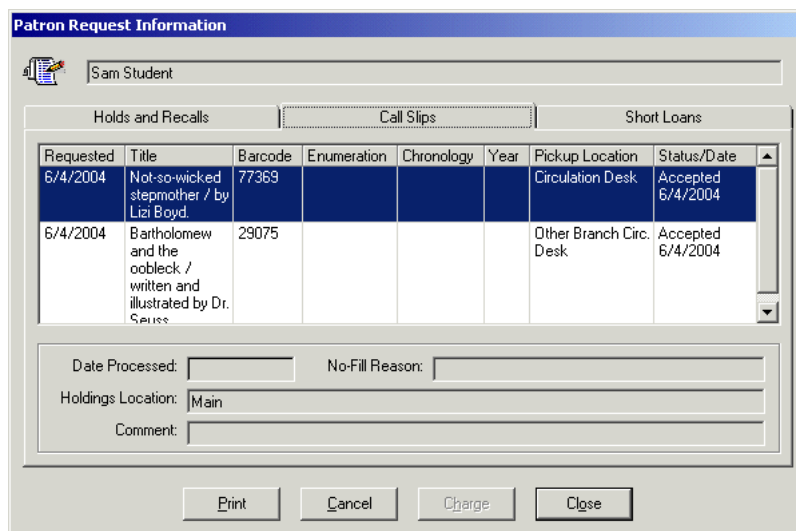


Figure 6-63. Patron Request Information Dialog Box, Call Slips Tab

The **Max Call Slip Requests** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab, defines the limit for the selected patron group ([Figure 6-64](#)).

The **Patron Rules** dialog box contains the following settings:

- ☒ Fines/Lost Item Fees Apply Max Outstanding Balance: \$25.00 Min Balance For Notice: \$5.00
- ☐ Courtesy Notice Apply
- ☒ Max Items Borrowed in this Policy Group 25
- ☒ Max Number Of Recalls Apply 3
- ☒ Max Claimed Returns Apply 2
- ☒ Max Call Slip Requests Apply 2
- ☐ Max Short Loan Titles Apply
- ☒ Max Overdue Items Apply 3
- ☒ Overdue Notice Apply
- ☒ Max Overdue Recalled Items Apply 2
- ☒ Max Self-Shelf Returns Apply 3
- ☒ Max Lost Items Apply 2
- ☒ Max Short Loan Apply 2
- ☐ Max Short Loan Per Day Apply
- ☒ Place Holds Using The OPAC
- ☒ Place Recalls Using The OPAC
- ☒ Place Short Loans Using The OPAC
- ☒ Place Call Slip Requests Using The OPAC
- ☐ Email Courtesy Notices
- ☐ Email Cancellation Notices
- ☐ Email Item Available Notices
- ☐ Email Overdue Notices
- ☐ Email (Other) Overdue Notices
- ☐ Email Recall Notices
- ☐ Email (Other) Recall Notices

Buttons: OK, Cancel

Figure 6-64. Patron Rules Dialog Box, Max Call Slip Requests Numerical Limit

The maximum callslips limit block arises when the patron attempts to make a call slip request and the number of current callslips meets or surpasses the limit. [Figure 6-65](#) shows the Call slip limit message seen in the Circulation module for this block.

The **Patron Blocked** dialog box displays the following information:

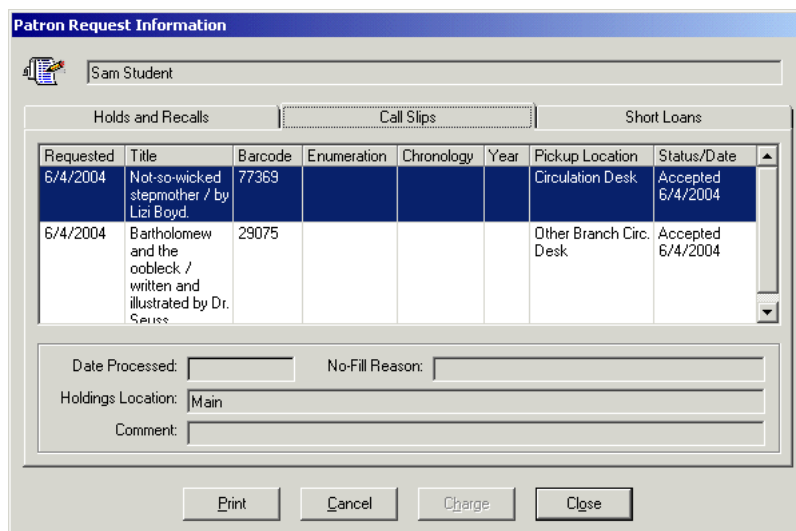
- Name: Sam Student
- Barcode: SS12345

Blocked due to...	Current	Group Limit
Call slip limit	2	2

Buttons: Override, Cancel

Figure 6-65. Call Slip Limit Block Message

To resolve this block, the circulation operator must cancel a callslip request such that the patron's current number of requests is less than the patron group limit. Use the **Patron Request Information** dialog box ([Figure 6-66](#)) to cancel a patron's callslip request. For information on how to cancel a callslip request, see the *Voyager Circulation User's Guide*.



The dialog box is titled "Patron Request Information" and has a tabbed interface with three tabs: "Holds and Recalls", "Call Slips", and "Short Loans". The "Call Slips" tab is currently selected. At the top, there is a text field labeled "Sam Student". Below the tabs is a table with the following columns: Requested, Title, Barcode, Enumeration, Chronology, Year, Pickup Location, and Status/Date. The table contains two rows of data. Below the table are three text fields: "Date Processed:", "No-Fill Reason:", and "Holdings Location: Main". At the bottom, there is a "Comment:" text field and four buttons: "Print", "Cancel", "Charge", and "Close".

Requested	Title	Barcode	Enumeration	Chronology	Year	Pickup Location	Status/Date
6/4/2004	Not-so-wicked stepmother / by Lizi Boyd.	77369				Circulation Desk	Accepted 6/4/2004
6/4/2004	Bartholomew and the oobleck / written and illustrated by Dr. Seuss	29075				Other Branch Circ. Desk	Accepted 6/4/2004

Date Processed: No-Fill Reason:

Holdings Location:

Comment:

Figure 6-66. Patron Information Request Dialog Box, Call Slips Tab

To override this block instead of resolving it, the operator must have Call slip Limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-67](#)).

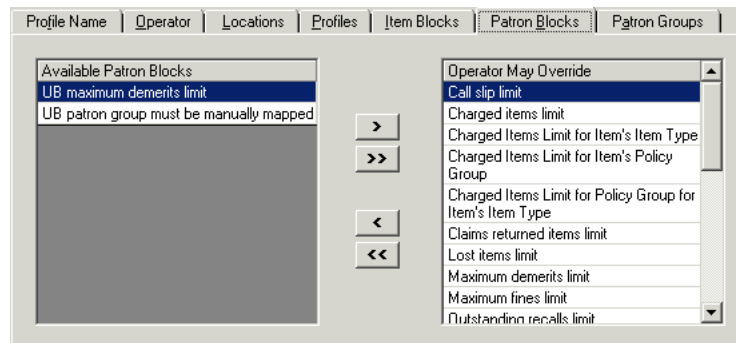


Figure 6-67. Call Slip Limit Override Ability

Suspension

The system confirms that the patron is not suspended from circulation activities. The **Suspended Until** field on the **History** tab of the patron record displays the patron's suspension status ([Figure 6-68](#)).

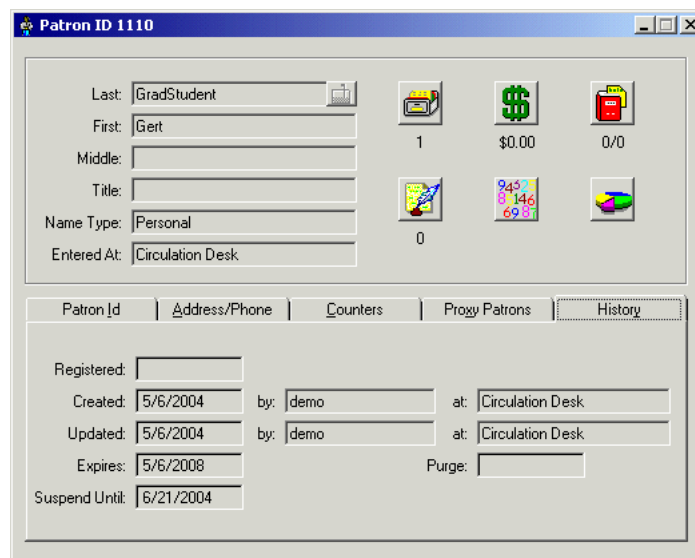


Figure 6-68. Patron Record, History Tab, Suspended Until Field

The patron suspended block arises when the charge or renew attempted is prior to the suspended until date. [Figure 6-69](#) shows the Patron is suspended until date message seen in the Circulation module for this block.

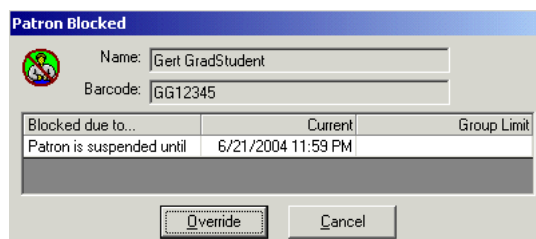


Figure 6-69. Patron is Suspended Block Message

To resolve this block, the circulation operator must change the suspension end date. Use the **Suspend Patron** dialog box ([Figure 6-70](#)) to change the patron's suspension end date. For information on how to edit the suspension end date, see the *Voyager Circulation User's Guide*.

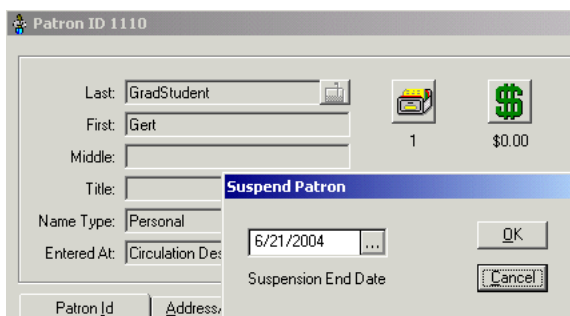


Figure 6-70. Suspend Patron Dialog Box

To override this block instead of resolving it, the operator must have Patron is suspended in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-71](#)).

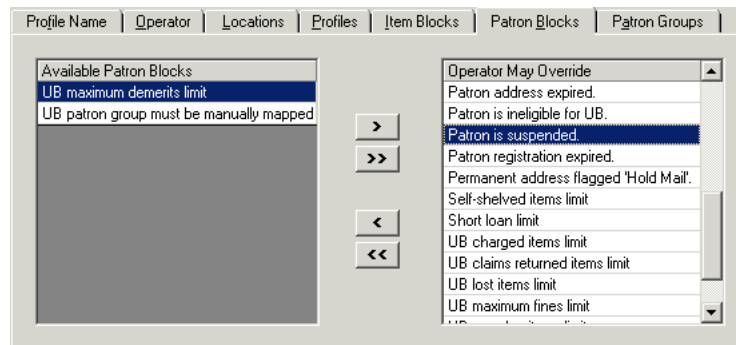
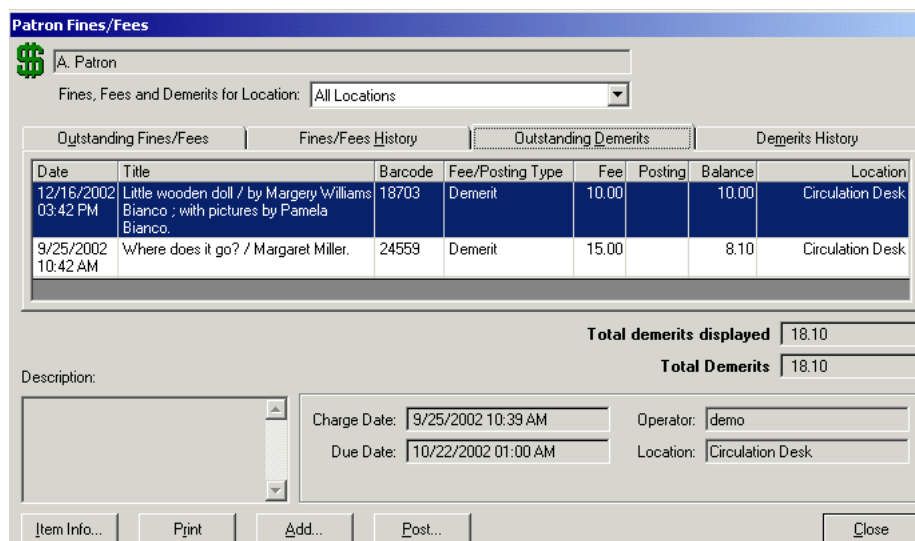


Figure 6-71. Patron Suspension Override Ability

Demerits Limit

For sites that use demerits instead of fines as a penalty for overdue books, the demerits limit may block a transaction. The system compares the patron's total outstanding demerits balance to the maximum outstanding balance allowed for the patron's patron group. The patron's current outstanding balance displays on the **Patron Fines/Fees** dialog box, **Outstanding Demerits** tab ([Figure 6-72](#)).



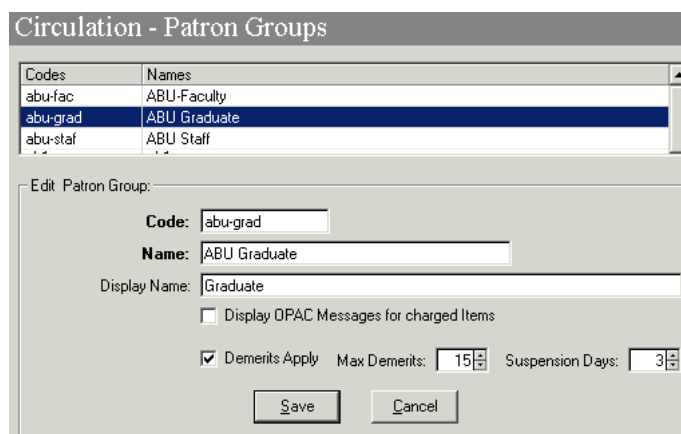
The dialog box is titled "Patron Fines/Fees" and features a green dollar sign icon. It includes a text field for the patron name, currently showing "A. Patron", and a dropdown menu for "Fines, Fees and Demerits for Location:" set to "All Locations". Below these are four tabs: "Outstanding Fines/Fees", "Fines/Fees History", "Outstanding Demerits" (which is selected), and "Demerits History". The "Outstanding Demerits" tab displays a table with the following data:

Date	Title	Barcode	Fee/Posting Type	Fee	Posting	Balance	Location
12/16/2002 03:42 PM	Little wooden doll / by Margery Williams Bianco ; with pictures by Pamela Bianco.	18703	Demerit	10.00		10.00	Circulation Desk
9/25/2002 10:42 AM	Where does it go? / Margaret Miller.	24559	Demerit	15.00		8.10	Circulation Desk

Below the table, the "Total demerits displayed" is 18.10 and the "Total Demerits" is also 18.10. A "Description:" text area is on the left, and on the right are fields for "Charge Date:" (9/25/2002 10:39 AM), "Operator:" (demo), "Due Date:" (10/22/2002 01:00 AM), and "Location:" (Circulation Desk). At the bottom are buttons for "Item Info...", "Print", "Add...", "Post...", and "Close".

Figure 6-72. Patron Fines/fees Dialog Box, Outstanding Demerits Tab

The **Max Demerits** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab for the selected patron group, defines this limit ([Figure 6-73](#)).



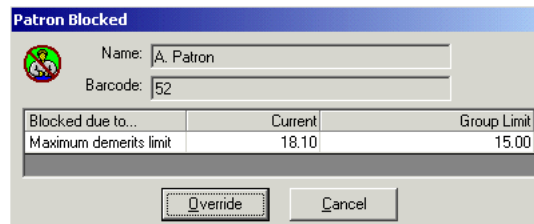
The dialog box is titled "Circulation - Patron Groups". It contains a table with two columns: "Codes" and "Names".

Codes	Names
abu-fac	ABU-Faculty
abu-grad	ABU Graduate
abu-staf	ABU Staff

Below the table is an "Edit Patron Group:" section. It includes fields for "Code:" (set to abu-grad), "Name:" (set to ABU Graduate), and "Display Name:" (set to Graduate). There is a checkbox for "Display OPAC Messages for charged Items" which is unchecked. A checked checkbox "Demerits Apply" is followed by "Max Demerits:" (set to 15) and "Suspension Days:" (set to 3). At the bottom are "Save" and "Cancel" buttons.

Figure 6-73. Circulation - Patron Groups, Max Demerits Numerical Limit

The maximum demerits limit block arises when the patron attempts to charge, or renew, an item and their current outstanding demerits balance surpasses the limit. [Figure 6-74](#) shows the Maximum demerits limit message seen in the Circulation module for this block.



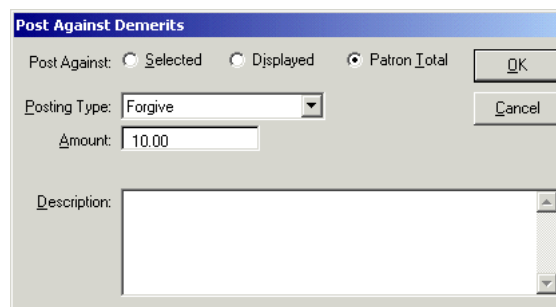
The 'Patron Blocked' dialog box displays the following information:

Blocked due to...	Current	Group Limit
Maximum demerits limit	18.10	15.00

Buttons:

Figure 6-74. Maximum Demerits Limit Block Message

To resolve this block, the patron's outstanding demerits balance must be reduced, such that the balance is less than the patron group limit. Use the **Post Against Demerits** dialog box ([Figure 6-75](#)) to reduce the patron's outstanding demerits balance. For information on how to post against demerits, see the *Voyager Circulation User's Guide*.



The 'Post Against Demerits' dialog box includes the following fields and controls:

- Post Against: ☐ Selected ☐ Displayed ☒ Patron Total
- Posting Type:
- Amount:
- Description:
- Buttons:

Figure 6-75. Post Against Demerits Dialog Box

To override this block instead of resolving it, the operator must have Maximum demerits limit selected in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-76](#)).

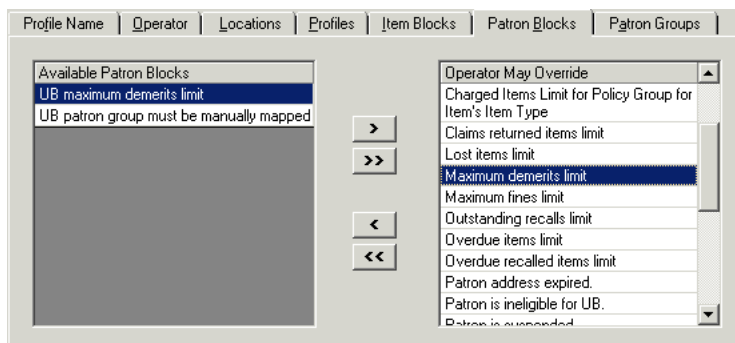


Figure 6-76. Maximum Demerits Limit Override Ability

UB Limits

For sites that participate in Universal Borrowing, there are several UB circulation limits. They are:

- UB Fine Limit
- UB Demerits Limit
- UB Max Items Borrowed Limit
- UB Overdue Limit
- UB Overdue Recall Limit
- UB Self-shelved Limit
- UB Claims Returned Limit
- UB Lost Limit
- UB Patron Group must be manually mapped

NOTE:

There are no recall, call slip, or short loan limits to define, since these requests are not allowed.

These various UB circulation limits are defined in the **Circulation - UB Policy Definitions** workspace ([Figure 6-77](#)). The exception is the patron group must be manually mapped block, which is defined in the **Circulation - Patron Group Mapping** workspace, see [Patron Group Mapping](#) on [page 5-188](#).

UB Eligible	Patron Groups
☒	CL1 patron
☒	CL2 intercluster patron
☒	Faculty
☐	Graphics for Copying
☐	ILL
☐	NMFS

Edit UB Policy Definition:	
☒ UB Eligible	☒ Block Local Transactions
☒ UB Fines/Lost Item Fees Apply	☒ Max Outstanding Balance
☐ Max UB Demerits Apply	☐ Max Demerits
☒ Max UB Items Borrowed Apply	☐ Max Item Borrowed
☒ Max UB Overdue Items Apply	☐ Max Overdue Items
☒ Max UB Overdue Recalled Items Apply	☐ Max Overdue Recalled Items
☒ Max UB Self-Shelf Returns Apply	☐ Max Self-Shelf Returns
☒ Max UB Claimed Returns Apply	☐ Max Claimed Returns
☒ Max UB Lost Items Apply	☐ Max Lost Items
☒ Max UB Requests Apply	☐ Max UB Request

Figure 6-77. Circulation - UB Policy Definitions, UB Limits

These limits work the same as their non-UB circulation limit counterparts. The system checks the patron's record to assess the current values and compares these to the numerical limits in the **Circulation - UB Policy Definitions** workspace. If the numerical value for a limit is reached or exceeded, the transaction is blocked. As with regular circulation transactions, when the patron attempts to charge or renew a UB item, these limits are checked.

The example in [Figure 6-78](#) shows the UB Lost items limit block seen in the Circulation module.

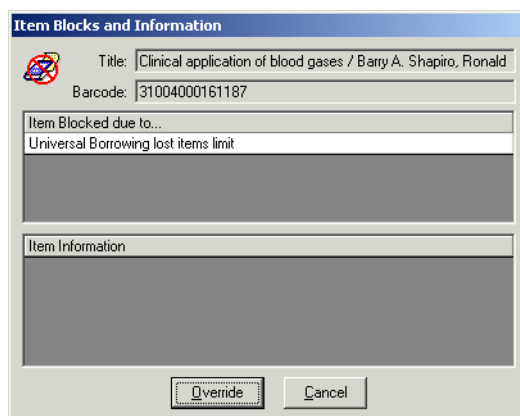


Figure 6-78. UB Lost Items Limit Block Message

To resolve the various UB blocks:

- If the block is
 - related to overdue UB items, discharge the appropriate items from the **Charged Items Index** dialog box ([Figure 6-79](#)).

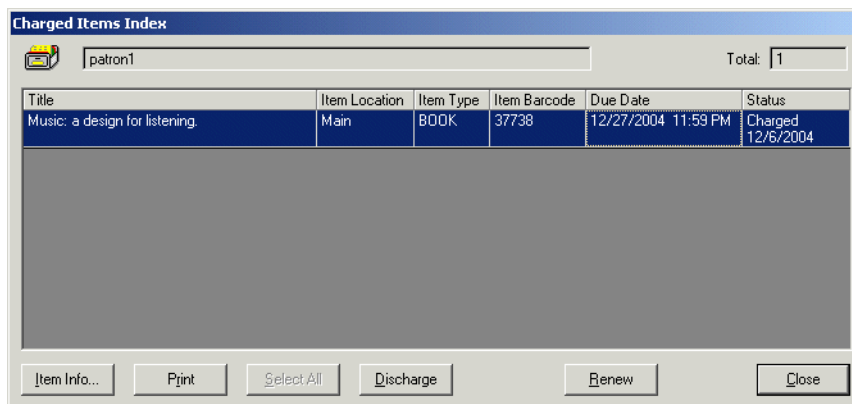
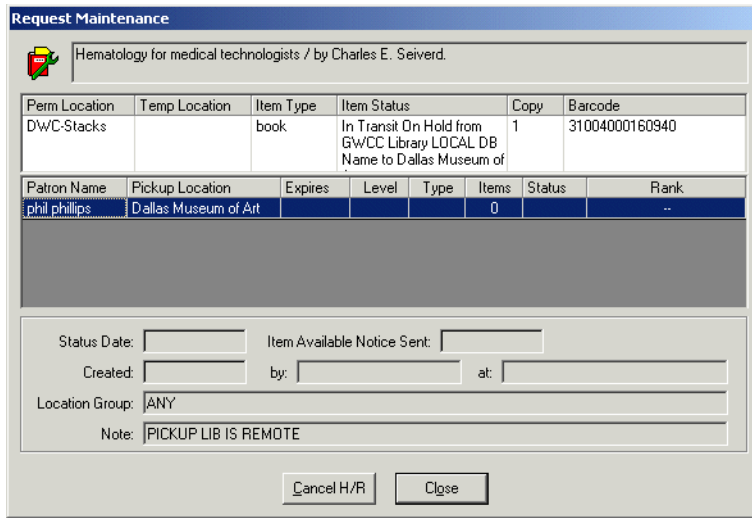


Figure 6-79. Charged Items Index Dialog Box

- related to requests, cancel the appropriate requests from the **Request Maintenance** dialog box ([Figure 6-80](#))



Request Maintenance

Hematology for medical technologists / by Charles E. Seiverd.

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
DWC-Stacks		book	In Transit On Hold from GWCC Library LOCAL DB Name to Dallas Museum of	1	31004000160940

Patron Name	Pickup Location	Expires	Level	Type	Items	Status	Rank
phil phillips	Dallas Museum of Art				0		..

Status Date: Item Available Notice Sent:

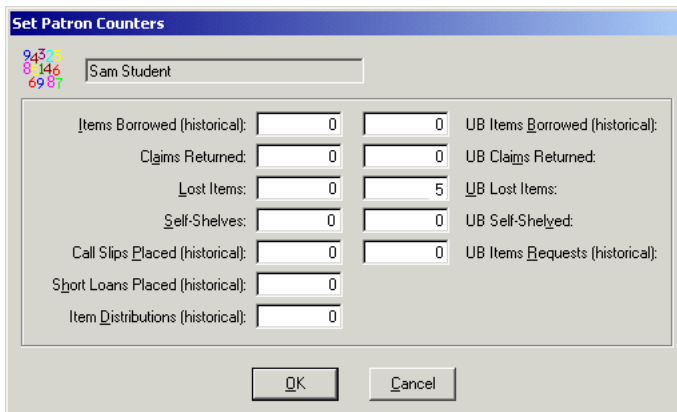
Created: by: at:

Location Group: ANY

Note: PICKUP LIB IS REMOTE

Figure 6-80. Request Maintenance Dialog Box

- related to patron counters, such as, Claims Returned, Lost Items, or the Self-Shelved, reduce the counters using the **Set Patron Counters** dialog box ([Figure 6-81](#)).



Set Patron Counters

94325
6146
6987

Sam Student

Items Borrowed (historical):	0	0	UB Items Borrowed (historical):
Claims Returned:	0	0	UB Claims Returned:
Lost Items:	0	5	UB Lost Items:
Self-Shelves:	0	0	UB Self-Shelves:
Call Slips Placed (historical):	0	0	UB Items Requests (historical):
Short Loans Placed (historical):	0		
Item Distributions (historical):	0		

Figure 6-81. UB Lost Items Numerical Limit

For more information, see the *Voyager Universal Borrowing User's Guide*, the *Voyager Circulation User Guide's*, and the *Voyager System Administration User's Guide* ([Patron Group Mapping](#) section).

To override UB blocks instead of resolving them, the operator must have the associated UB limit listed in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-82](#)).

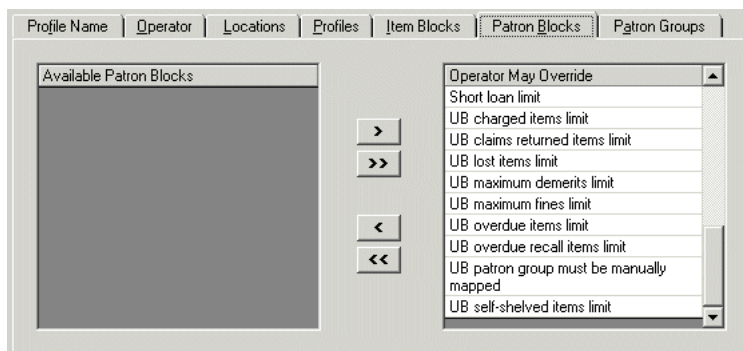


Figure 6-82. UB Limits Override Ability

Item Blocks

There are a variety of item-related blocks and informational messages. This section discusses these, where they are defined, the messages seen in the Circulation module when a block arises, and ways to resolve blocks.



IMPORTANT:

Charge transactions are driven by the item's circulation policy group. When attempting to charge an item, if it is not associated with a circulation policy group, the This item cannot be charged because there is no circulation policy group associated with it message displays ([Figure 6-83](#)).

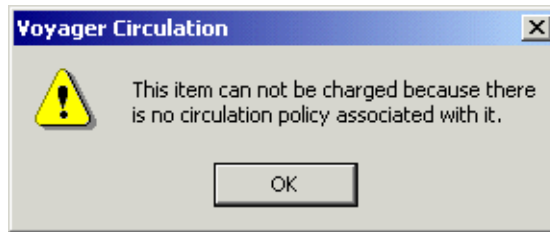


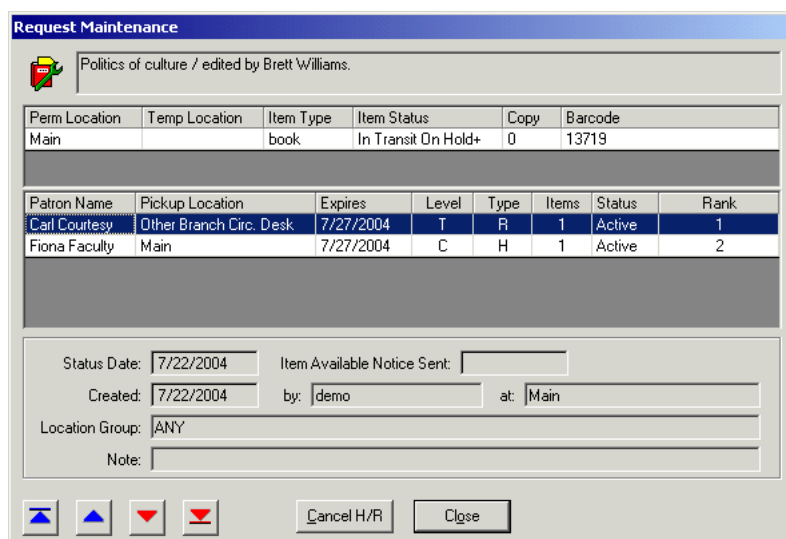
Figure 6-83. Warning Message

Hold for Other Patron

When a charge is attempted, the system checks to see if the item has a hold or recall request pending. This is a system defined check and cannot be changed. To determine if a Hold or Recall request is pending for an item, access the **Request Maintenance** dialog box, **Item Status** column ([Figure 6-84](#)).

NOTE:

The type of request is displayed in the **Type** column. R corresponds to Recall requests, H to Hold requests.



Request Maintenance

Politics of culture / edited by Brett Williams.

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Main		book	In Transit On Hold+	0	13719

Patron Name	Pickup Location	Expires	Level	Type	Items	Status	Rank
Carl Courtesy	Other Branch Circ. Desk	7/27/2004	T	R	1	Active	1
Fiona Faculty	Main	7/27/2004	C	H	1	Active	2

Status Date: 7/22/2004 Item Available Notice Sent:

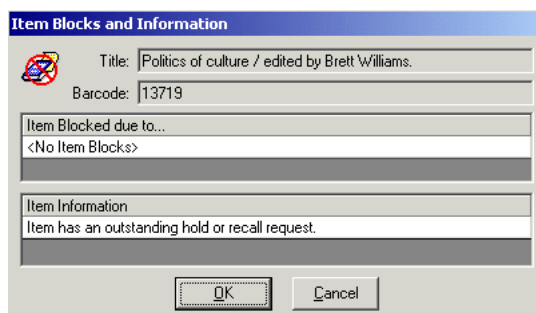
Created: 7/22/2004 by: demo at: Main

Location Group: ANY

Note:

Figure 6-84. Request Maintenance Dialog Box Hold Requests

The item has an outstanding hold or recall request informational message arises if the item is on hold for (or recalled by) another patron. [Figure 6-85](#) shows the message.



Item Blocks and Information

Title: Politics of culture / edited by Brett Williams.

Barcode: 13719

Item Blocked due to...

<No Item Blocks>

Item Information

Item has an outstanding hold or recall request.

Figure 6-85. Item has an Outstanding Hold or Recall Message

Since this is not a block, but only an informational message, there is no override necessary. Clicking the **OK** button acknowledges the message, and then completes the charge transaction.

To eliminate the message, operators can cancel any pending hold requests. See [Figure 6-86](#), **Request Maintenance** dialog box for canceling requests. For more information on how to cancel requests, see the *Voyager Circulation User's Guide*.

Request Maintenance

Politics of culture / edited by Brett Williams.

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Main		book	In Transit On Hold+	0	13719

Patron Name	Pickup Location	Expires	Level	Type	Items	Status	Rank
Carl Courtesy	Other Branch Circ. Desk	7/27/2004	T	R	1	Active	1
Fiona Faculty	Main	7/27/2004	C	H	1	Active	2

Status Date: 7/22/2004 Item Available Notice Sent:

Created: 7/22/2004 by: demo at: Main

Location Group: ANY

Note:

Buttons: [Up] [Down] [Cancel H/R] [Close]

Figure 6-86. Item Request Maintenance Dialog Box

To override this block instead of resolving it, the operator must have Item on hold for another patron in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-87](#)).

Profile Name | Operator | Locations | Profiles | **Item Blocks** | Patron Blocks | Patron Groups

Available Item Blocks

Operator May Override

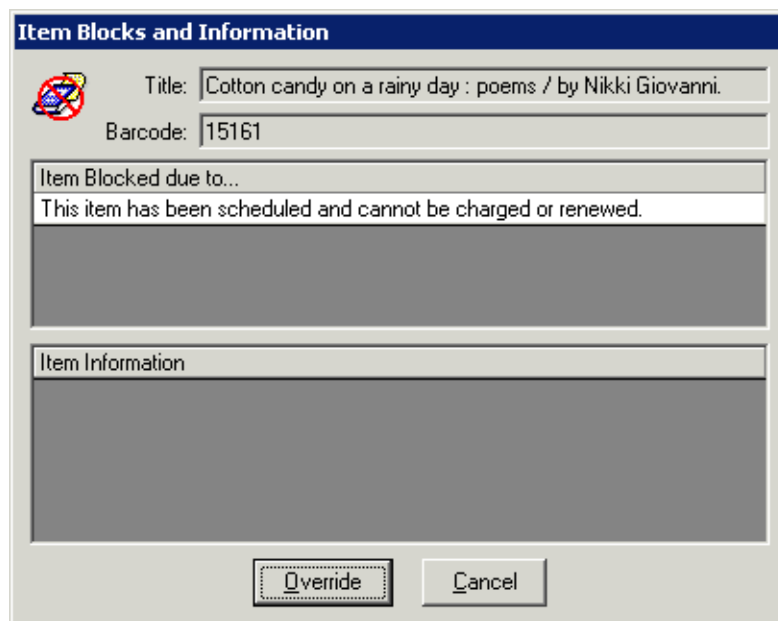
- Item not allowed to circulate from this location.
- Item not authorized for discharge at this location.
- Item not authorized for renewal.
- Item on hold for another patron.**
- Item scheduled for a short loan request.
- Item scheduled, cannot be charged or renewed.
- Items with hold requests may not be renewed.
- Items with recall requests may not be

Buttons: > >> < <<

Figure 6-87. Item on Hold for Another Patron Override Ability

Item Scheduled (Media)

When a charge or renew is attempted on an item that has been scheduled via the Media Scheduling module, the item has been scheduled and cannot be charged or renewed block message displays ([Figure 6-88](#)).



Item Blocks and Information

 Title: Cotton candy on a rainy day : poems / by Nikki Giovanni.

Barcode: 15161

Item Blocked due to...

This item has been scheduled and cannot be charged or renewed.

Item Information

Figure 6-88. Item Scheduled Cannot be Renewed or Charged Block Message

To eliminate the message, operators can cancel any scheduled bookings. For information on how to cancel bookings, see the *Voyager Media Scheduling User's Guide*.

To override this block instead of resolving it, the operator must have Item scheduled, cannot be charged or renewed in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-89](#)).

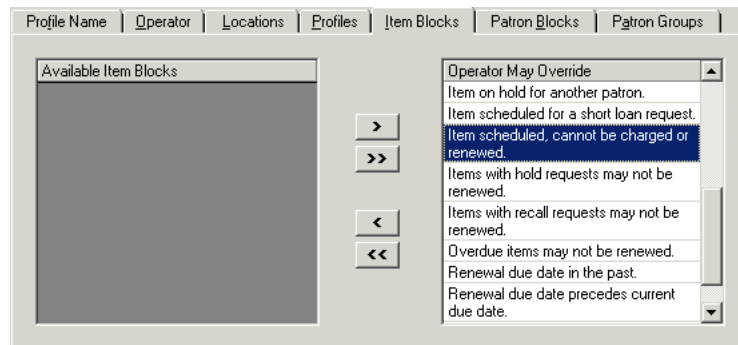
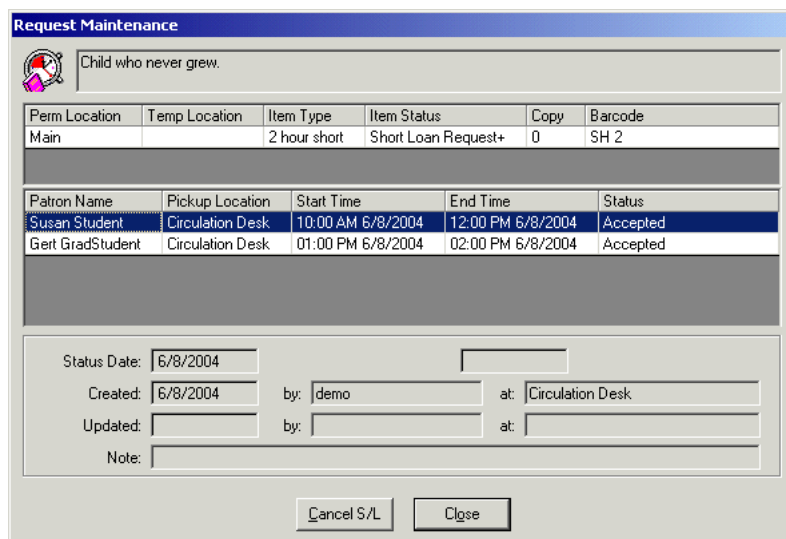


Figure 6-89. Item Scheduled, Cannot be Charged or Renewed Override Ability

Item Scheduled for a Short Loan Request

When a charge or renew is attempted with a short loan item, the system checks to see if the item is scheduled for a short loan. This is a system defined block and cannot be changed. To determine if an item is scheduled, access the **Request Maintenance** dialog box, **Item Status** column, accessed from the item record ([Figure 6-84](#)).



The "Request Maintenance" dialog box displays a form for managing short loan requests. It includes a title bar, a text area for a note, a table for item details, a table for patron details, and a section for status and creation information.

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Main		2 hour short	Short Loan Request+	0	SH 2

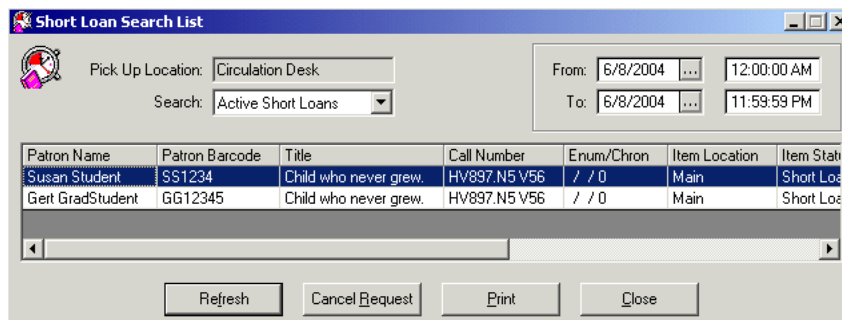
Patron Name	Pickup Location	Start Time	End Time	Status
Susan Student	Circulation Desk	10:00 AM 6/8/2004	12:00 PM 6/8/2004	Accepted
Gert GradStudent	Circulation Desk	01:00 PM 6/8/2004	02:00 PM 6/8/2004	Accepted

Status Date: 6/8/2004
Created: 6/8/2004 by: demo at: Circulation Desk
Updated: by: at:
Note:

Buttons: Cancel S/L, Close

Figure 6-90. Request Maintenance Dialog Box Short Loan Requests

Operators can also access the **Short Loan** dialog box to view active short loans ([Figure 6-91](#)).



The "Short Loan Search List" dialog box displays a search interface for active short loans. It includes a title bar, a search criteria section, a date and time range section, a table of search results, and a section for actions.

Pick Up Location: Circulation Desk
Search: Active Short Loans
From: 6/8/2004 12:00:00 AM
To: 6/8/2004 11:59:59 PM

Patron Name	Patron Barcode	Title	Call Number	Enum/Chron	Item Location	Item Status
Susan Student	SS1234	Child who never grew.	HV897.N5 V56	/ / 0	Main	Short Loan
Gert GradStudent	GG12345	Child who never grew.	HV897.N5 V56	/ / 0	Main	Short Loan

Buttons: Refresh, Cancel Request, Print, Close

Figure 6-91. Short Loan Dialog Box

The item scheduled for a short loan request block arises if the short loan item is scheduled. [Figure 6-92](#) shows the Item is scheduled for a short loan request block message.

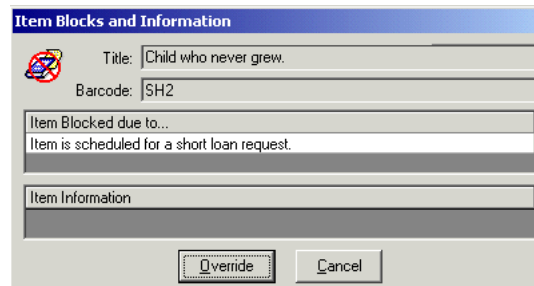


Figure 6-92. Item Scheduled for a Short Loan Request Message

To resolve this block, the operator can access the **Request Maintenance** dialog box and cancel the short loan request ([Figure 6-93](#)). For information on canceling the short loan, see the *Voyager Circulation User's Guide*.

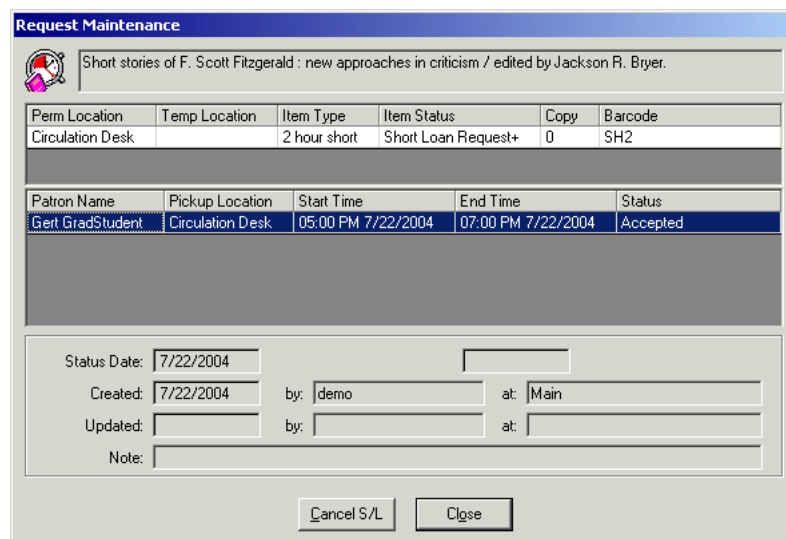


Figure 6-93. Request Maintenance Dialog Box to Cancel the Short Loan

To override this block instead of resolving it, the operator must have Item scheduled for a short loan request in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-94](#)).

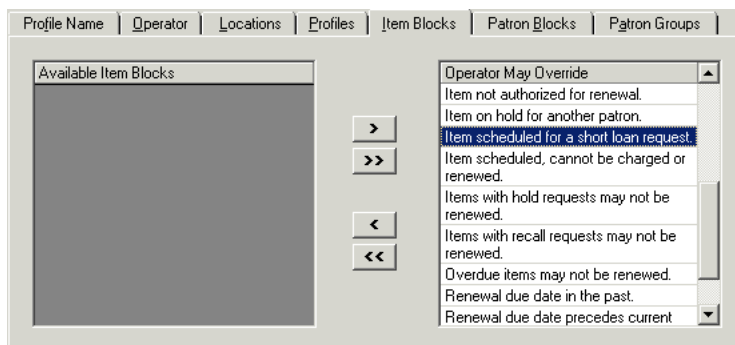


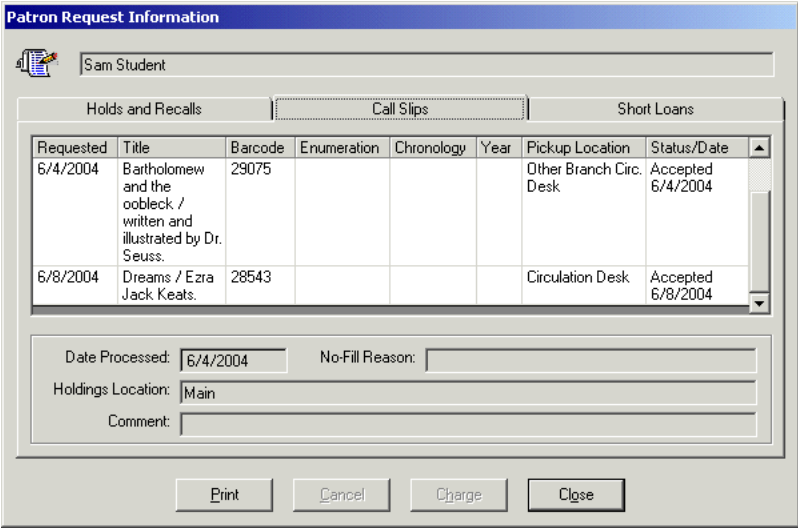
Figure 6-94. Item Scheduled for Short Loan Request Override Ability

Callslip by Others

When a charge or renew is attempted, the system checks to see if the item is scheduled for a call slip. This is a system defined block and cannot be changed. To determine if a callslip request is pending, access the **Request Maintenance** dialog box, **Item Status** column, accessed from the item record ([Figure 6-84](#)).

Figure 6-95. Request Maintenance Dialog Box Call Slip Request

Operators can also access the **Patron Request** dialog box to view active call slips ([Figure 6-96](#)).



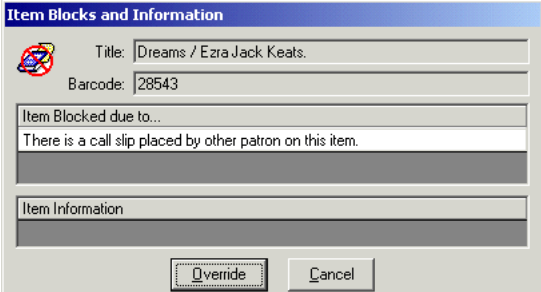
The dialog box is titled "Patron Request Information" and has a tabbed interface with three tabs: "Holds and Recalls", "Call Slips" (which is selected), and "Short Loans". The "Call Slips" tab contains a table with the following data:

Requested	Title	Barcode	Enumeration	Chronology	Year	Pickup Location	Status/Date
6/4/2004	Bartholomew and the oobleck / written and illustrated by Dr. Seuss.	29075				Other Branch Circ. Desk	Accepted 6/4/2004
6/8/2004	Dreams / Ezra Jack Keats.	28543				Circulation Desk	Accepted 6/8/2004

Below the table, there are input fields for "Date Processed:" (containing 6/4/2004), "No-Fill Reason:" (empty), "Holdings Location:" (containing Main), and a "Comment:" field. At the bottom are buttons for "Print", "Cancel", "Charge", and "Close".

Figure 6-96. Patron Request Information Dialog Box, Call Slips Tab

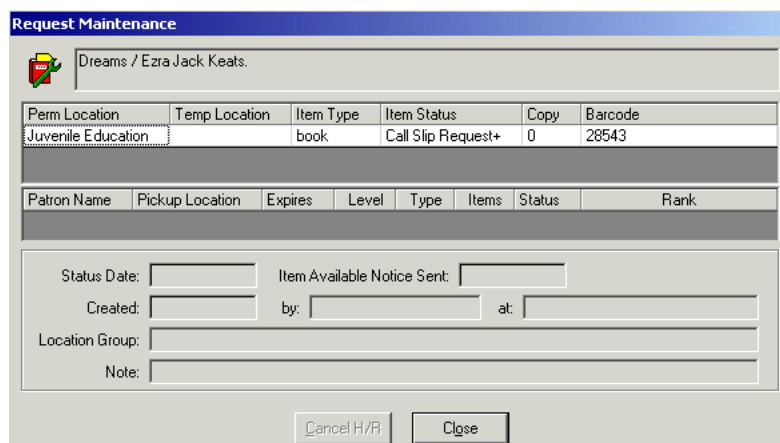
The call slip placed by other patron block arises if the item has a pending call slip request. [Figure 6-97](#) shows the There is a call slip placed by other patron on the item block message.



The dialog box is titled "Item Blocks and Information". It shows the "Title:" as "Dreams / Ezra Jack Keats." and the "Barcode:" as "28543". Below this, a message box states: "Item Blocked due to... There is a call slip placed by other patron on this item." At the bottom, there is an "Item Information" section and two buttons: "Override" and "Cancel".

Figure 6-97. There is a Call Slip Placed by Other Patron on the Item Block Message

To resolve this block, an operator can cancel the call slip request from the **Request Maintenance** dialog box ([Figure 6-98](#)). For information on canceling the call slip, see the *Voyager Circulation User's Guide*.



The Request Maintenance dialog box is titled "Request Maintenance". It features a search bar at the top with a magnifying glass icon and the text "Dreams / Ezra Jack Keats.". Below the search bar are two tables. The first table has columns: Perm Location, Temp Location, Item Type, Item Status, Copy, and Barcode. The second table has columns: Patron Name, Pickup Location, Expires, Level, Type, Items, Status, and Rank. Below the tables are several input fields: Status Date, Item Available Notice Sent, Created, by, at, Location Group, and Note. At the bottom are two buttons: "Cancel H/R" and "Close".

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Juvenile Education		book	Call Slip Request+	0	28543

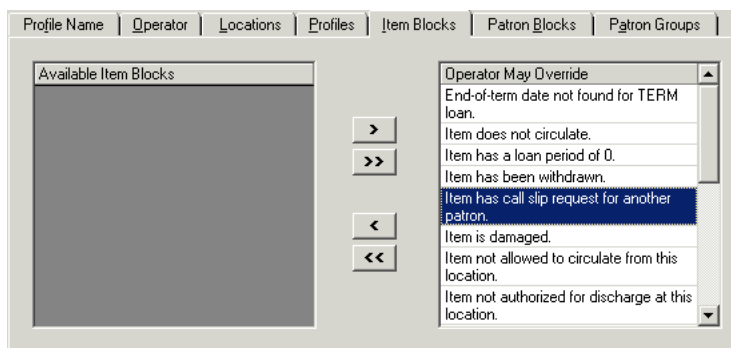
Patron Name	Pickup Location	Expires	Level	Type	Items	Status	Rank

Status Date: Item Available Notice Sent:
Created: by: at:
Location Group:
Note:

Cancel H/R Close

Figure 6-98. Request Maintenance Dialog Box Used to Cancel the Request

To override this block instead of resolving it, the operator must have Item has call slip request for another patron in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-99](#)).



The Item Blocks tab of the Circulation security profile shows a list of available item blocks on the left and a list of operator may override options on the right. The "Item has call slip request for another patron" option is highlighted in the list.

Profile Name	Operator	Locations	Profiles	Item Blocks	Patron Blocks	Patron Groups

Available Item Blocks

Operator May Override

- End-of-term date not found for TERM loan.
- Item does not circulate.
- Item has a loan period of 0.
- Item has been withdrawn.
- Item has call slip request for another patron.
- Item is damaged.
- Item not allowed to circulate from this location.
- Item not authorized for discharge at this location.

Figure 6-99. Item has Call Slip Request for Another Patron Override Ability

Non-Circulating Item

The system checks the circulation policies, specifically the circulation matrix for the particular patron group-item type combination, to determine whether or not an item can circulate ([Figure 6-100](#)). The **Charge/Renew** check box defines this limit.

Figure 6-100. Matrix-- How to Determine If Non-circulating?

The item does not circulate block arises if the **Charge/Renew** check box is not selected. [Figure 6-101](#) shows the Item does not circulate block message.

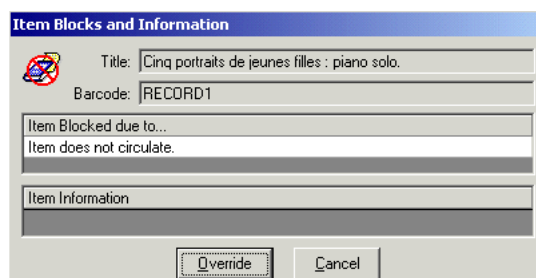


Figure 6-101. Item does Not Circulate Block Message

To resolve this block, administrators can select the **Charge/Renew** check box for the patron group-item type to allow this item to be charged ([Figure 6-102](#)). For information on configuring the circulation matrix, see the *Voyager System Administration User's Guide*, [Matrix Tab and Circulation Policy Settings](#).

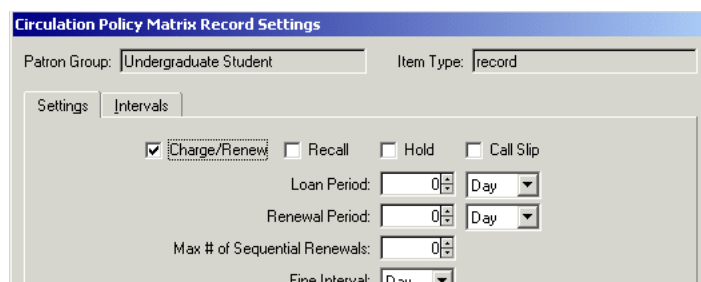


Figure 6-102. Charge/Renew Check Box Selected

To override this block instead of resolving it, the operator must have **Item does not circulate** in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-103](#)).

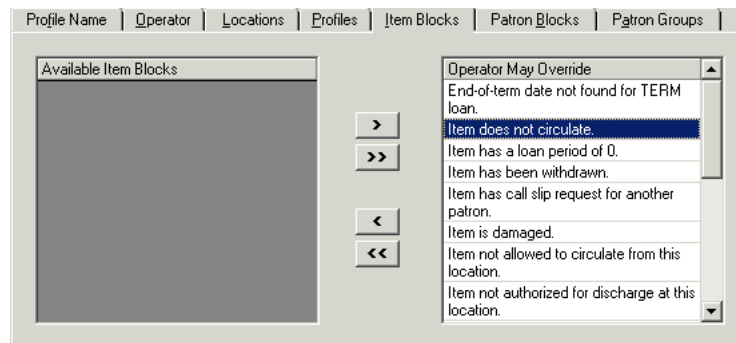


Figure 6-103. Item does Not Circulate Override Ability

Zero Loan Period

The system checks the item's circulation policies, specifically the circulation matrix for the particular patron group-item type combination, to determine the loan period for an item ([Figure 6-104](#)).

Figure 6-104. Loan Period is Zero

The item has a loan period of 0 block arises if the value in the **Loan Period** field is zero. [Figure 6-105](#) shows the Item has a loan period of 0 block message.

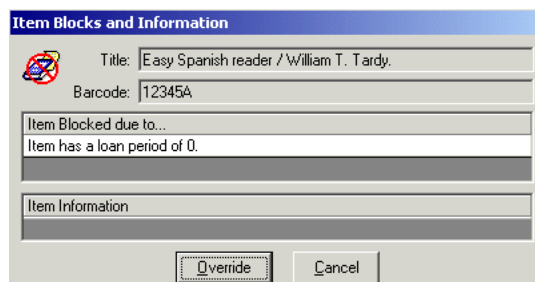


Figure 6-105. Loan Period of 0 Item Block Message

To resolve this block, administrators can increase the value of the loan period for the patron group-item type ([Figure 6-106](#)). For information on configuring the circulation matrix, see the *Voyager System Administration User's Guide*, [Matrix Tab and Circulation Policy Settings](#).

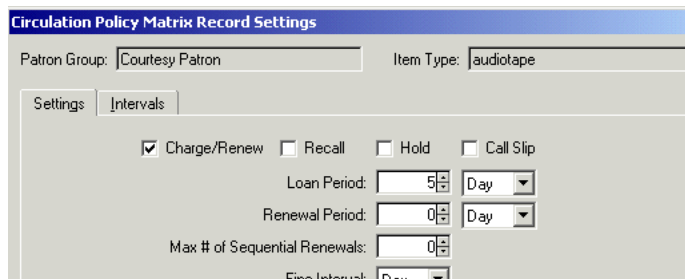


Figure 6-106. Loan Period Value Increased to Five

To override this block instead of resolving it, the operator must have Item has a loan period of 0 in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-107](#)).

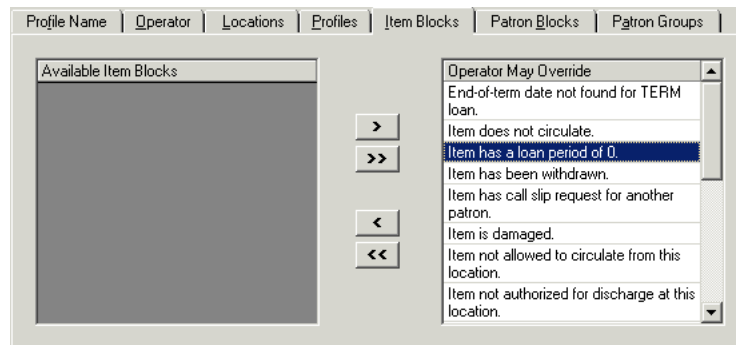


Figure 6-107. Item has a Loan Period of 0 Override Ability

Term Due Date Not Found

When attempting to calculate a loan period for a patron group-item type combination where the loan period is TERM, the system checks the circulation calendar, **Term Loans** tab ([Figure 6-108](#)) found on the **Circulation - Calendar** workspace.

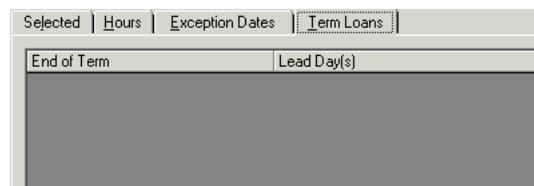


Figure 6-108. Term Loans Tab, No End of Term Date Found

The end of term block condition arises, if no **End of Term** date is found. [Figure 6-109](#) shows the Item has a loan period of TERM, but an end-of-term date has not been found in the current calendar block message.

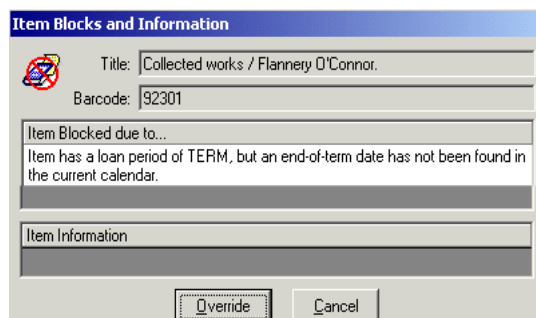


Figure 6-109. No End-of-Term Date Block Message

NOTE:

An exception is not logged in this situation.

To resolve this block, administrators can add an end-of-term date to the current calendar using the **Circulation Calendar Term Settings** dialog box ([Figure 6-110](#)). For information on configuring the circulation calendar, see the *Voyager System Administration User's Guide*, [Circulation - Calendars Workspace](#).

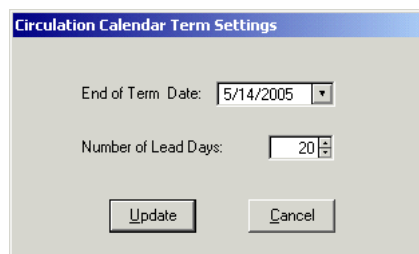


Figure 6-110. Circulation Calendar Term Settings Dialog Box

To override this block instead of resolving it, the operator must have End-of-term date not found for TERM loan in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-111](#)).

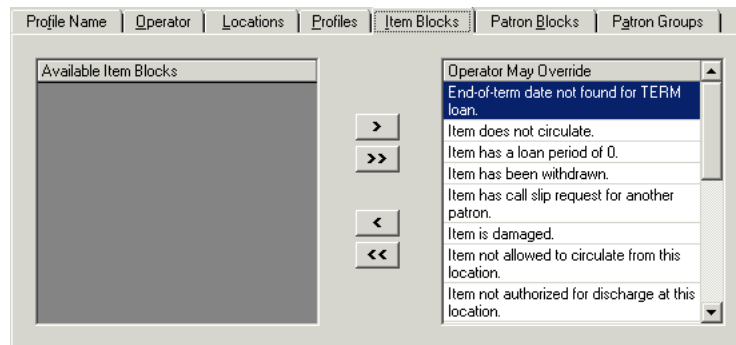


Figure 6-111. End-of-Term Date Not Found for TERM Loan Override Ability

Out of Phase Term Renewal

When attempting to calculate a renewal due date for a patron group-item type combination where the loan period is TERM, the system checks the circulation calendar, **Term Loans** tab ([Figure 6-112](#)) found on the **Circulation - Calendar** workspace. The renewal must be made within the number of lead days specified prior to the end of the term.

Selected	Hours	Exception Dates	Term Loans
End of Term		Lead Day(s)	
8/13/2004		5	
12/30/2004		10	

Figure 6-112. Term Loans Tab

The out of phase term renewal block condition arises when the TERM renewal is made before the permitted renewal period begins. [Figure 6-113](#) shows the Item has a loan period of TERM and is being renewed before the permitted renewal period block message.

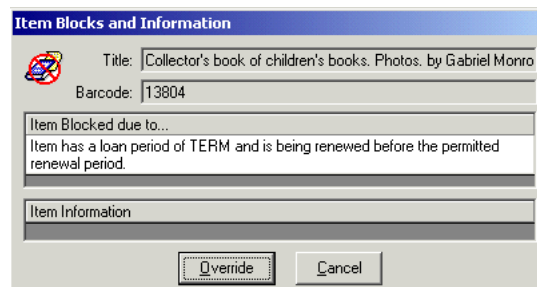


Figure 6-113. TERM Renewal Precedes Permitted Renewal Period Block Message

To resolve this block, administrators can increase the number of lead days such that the current date would be included in the permitted renewal period ([Figure 6-114](#)). For information on configuring the circulation calendar, see the *Voyager System Administration User's Guide*, [Term Loans Tab](#) on [page 5-16](#).

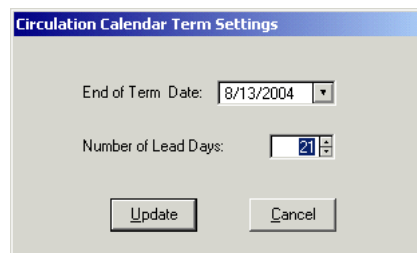


Figure 6-114. Increase the Number of Lead Days

To override this block instead of resolving it, the operator must have TERM renewal precedes permitted renewal period in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-115](#)).

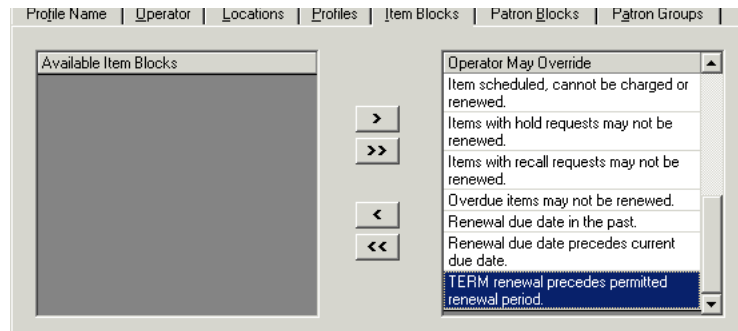


Figure 6-115. TERM Renewal Precedes Permitted Renewal Period Override Ability

New Due Date Before Current Due Date

When renewing an item, the system calculates a due date for the specific patron group-item type combination using the value in the **Renewal period** field and the selected **Renew From** radio button on the **Circulation Policy Matrix Record Settings** dialog box accessed from the **Matrix** tab ([Figure 6-116](#)).

Patron Group: Graduate Student Item Type: Book

Settings Intervals

☒ Charge/Renew ☒ Recall ☒ Hold ☒ Call Slip

Loan Period: 15 Days

Renewal Period: 5 Days

Max # of Sequential Renewals: 3

Fine Interval: Day

Fine Rate: \$0.00

Max Fine Amount: \$0.01

Max Fine for Recalls: \$0.00

Min Loan Period for Recalled Items: 21 Days

Recall Fine Interval: Day

Recall Fine Rate: \$0.00

Grace Period: 3 Days

Recall Return Interval: 5

Recall Grace Period: 3

☒ Max Items Borrowed for this Patron Group & Item Type: 1

Renew From: ☒ Original Due Date ☐ Renewal Date

Figure 6-116. Circulation Policy Matrix Record Settings Dialog Box

The block condition arises if the newly-calculated date precedes the current due date. [Figure 6-113](#) shows the The renewal due date calculated precedes the item's current due date block message.

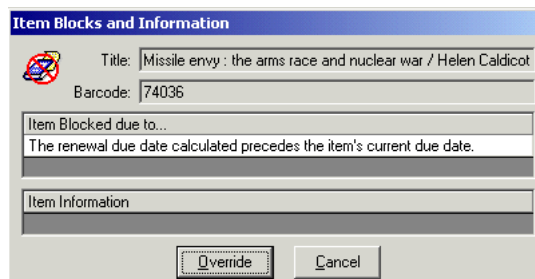


Figure 6-117. Item Block**NOTE:**

No exception is logged in this situation.

To resolve this block, administrators can alter the renewal loan period value ([Figure 6-118](#)). For information on configuring the circulation matrix, see the *Voyager System Administration User's Guide*, [Matrix Tab and Circulation Policy Settings](#).

Figure 6-118. New Value in the Renewal Period Field

To override this block instead of resolving it, the operator must have Renewal due date precedes current due date in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-119](#)).

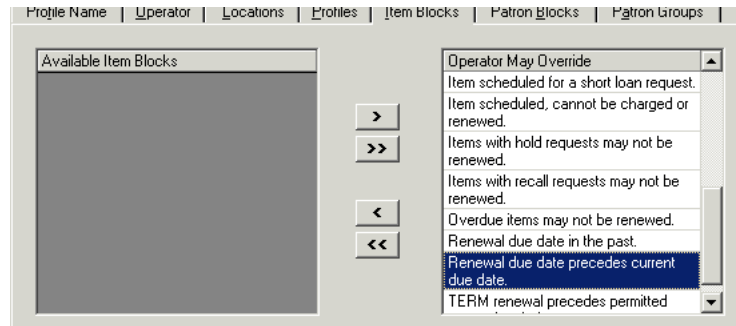


Figure 6-119. Renewal Due Date Precedes Current Due Date Override Ability

New Due Date in Past

When renewing an item, the system calculates a new due date for the specific patron group-item type combination using the value in the **Renewal period** field and the selected **Renew From** radio button on the **Circulation Policy Matrix Record Settings** dialog box accessed from the **Matrix** tab ([Figure 6-120](#)).

Figure 6-120. Circulation Policy Matrix Record Settings Dialog Box

This block condition arises when the newly-calculated renewal due date is prior to the current date. [Figure 6-121](#) shows the Renewal due date in the past block message.

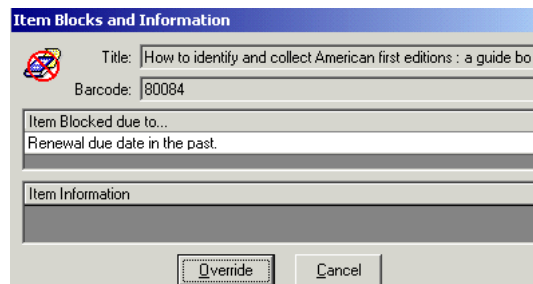


Figure 6-121. Renewal Due Date in the Past Block Message

NOTE:

No exception is logged in this situation.

To resolve this block, administrators can enter/modify the due date ([Figure 6-122](#)).

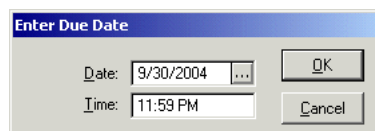


Figure 6-122. Enter Due Date Dialog Box

To override this block instead of resolving it, the operator must have Renewal due date in the past in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-123](#)).

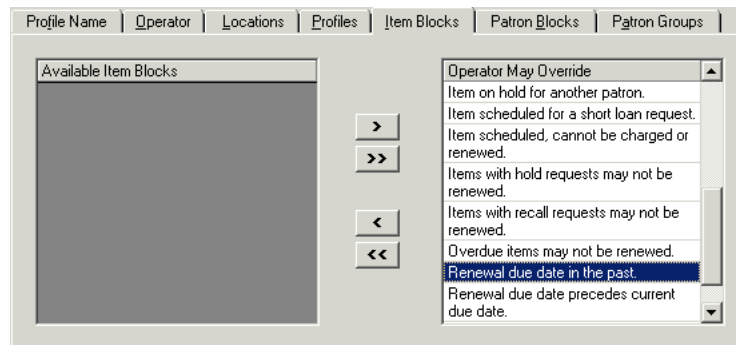


Figure 6-123. Renewal Due Date in the Past Override Ability

Damaged Item

When charging an item, the system checks the item's item status ([Figure 6-124](#)). This is a system-defined block and cannot be changed.

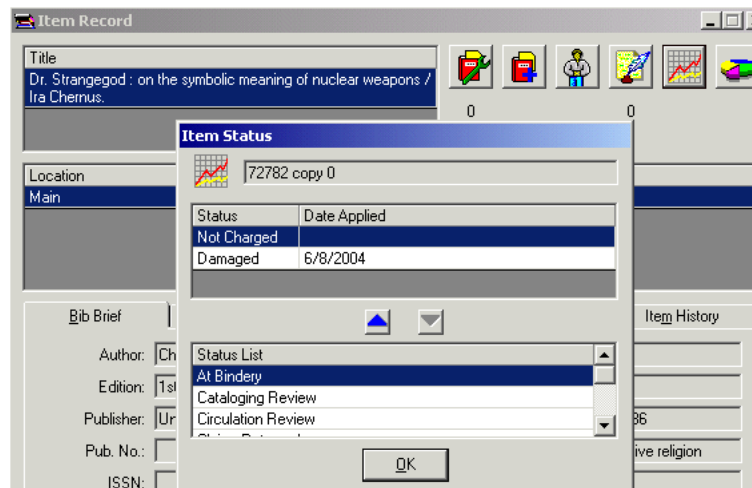


Figure 6-124. Item Status of Damaged

The block condition arises if it has a status of Damaged. [Figure 6-125](#) shows the Item is damaged block message.

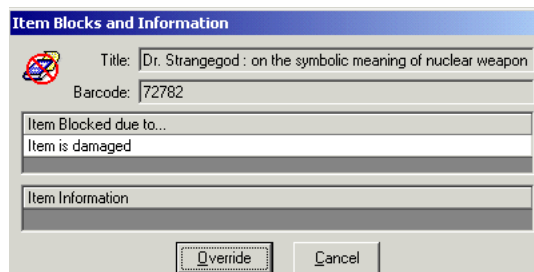


Figure 6-125. Item is Damaged Block Message

To resolve this block, the operator can remove the damaged item status. For information on changing the item's item status, see the *Voyager Circulation User's Guide*.

To override this block, the operator must have **Item is damaged** in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-126](#)).

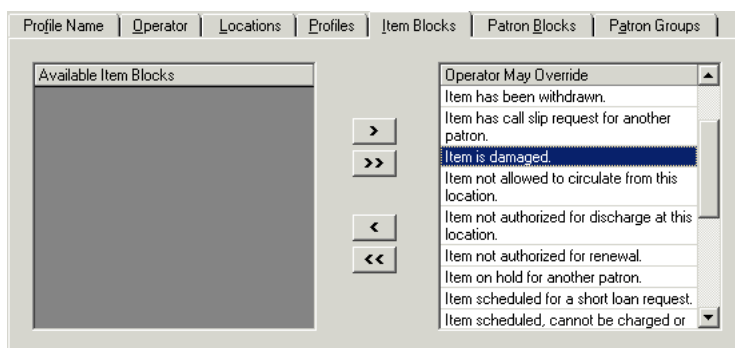


Figure 6-126. Item is Damaged Override Ability

Withdrawn Item

When charging an item, the system checks the item's item status ([Figure 6-127](#)). This is a system-defined block and cannot be changed.

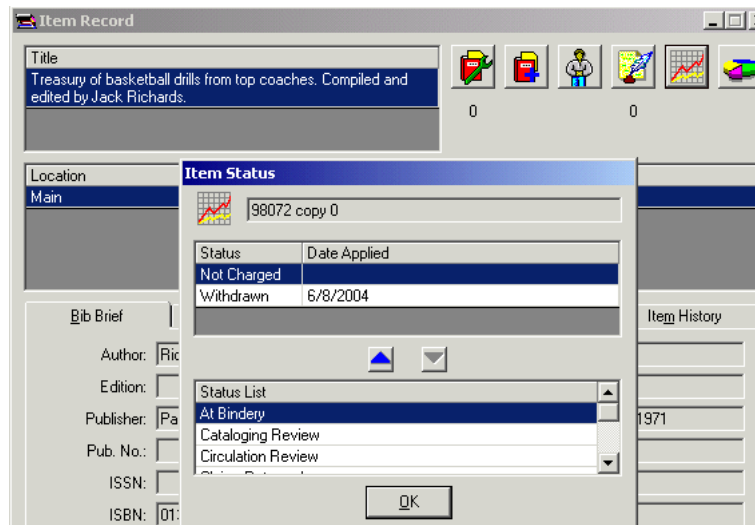


Figure 6-127. Item Status of Withdrawn

The block condition arises if it has a status of Withdrawn. [Figure 6-126](#) shows the Item is withdrawn block message.

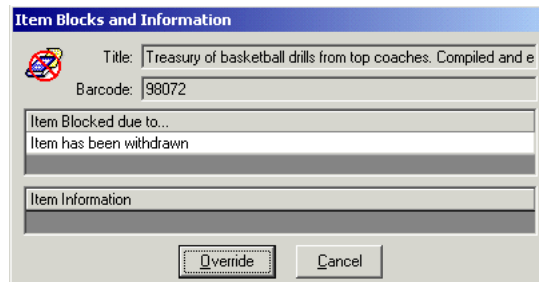


Figure 6-128. Item has been Withdrawn Block Message

To resolve this block, the operator can remove the withdrawn item status. For information on changing the item's item status, see the *Voyager Circulation User's Guide*.

To override this block, the operator must have **Item is withdrawn** in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-129](#)).

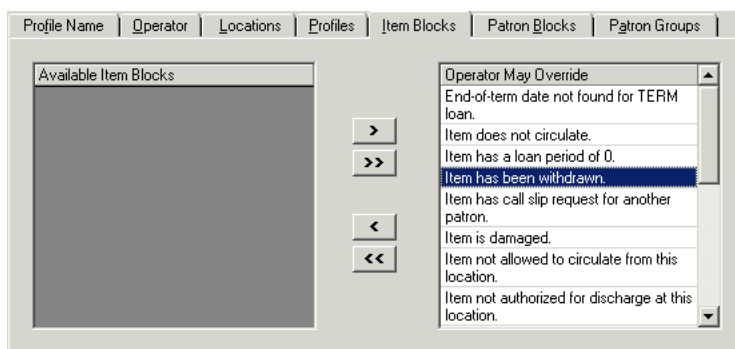


Figure 6-129. Item is Withdrawn Override Ability

Foreign Item Location

When charging an item, the system determines the circulation policy group that is associated with the item and determines the active circulation desk.

This block arises if the active circulation desk does not belong to the item's circulation policy group. This is a system defined block and cannot be changed.

[Figure 6-125](#) shows the This item is not authorized to circulate from this location block message.

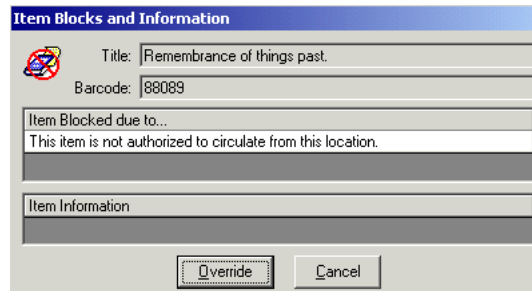


Figure 6-130. Item is Not Authorized to Circulate from this Location Block Message

To resolve this block, log into a desk within the item's policy group to charge the item.

To override this block, the operator must have Item not allowed to circulate from this location in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-131](#)).

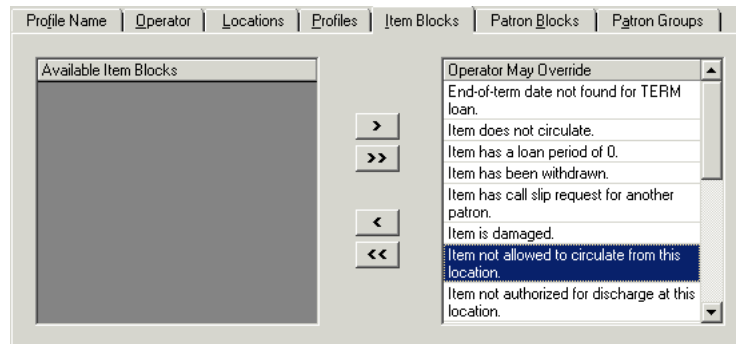
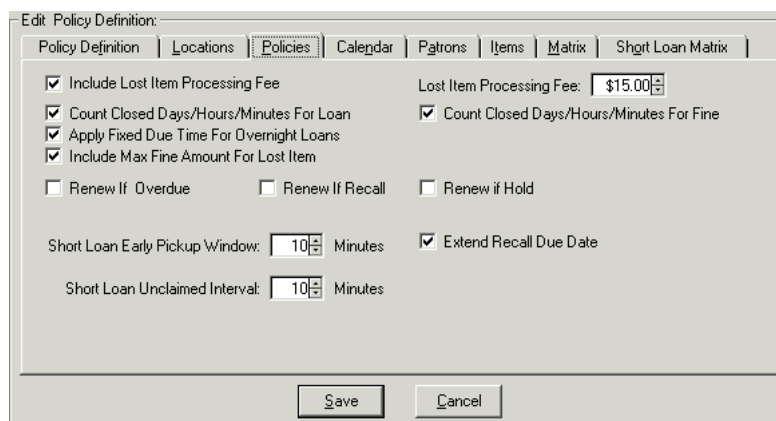


Figure 6-131. Item Not Allowed to Circulate from this Location Override Ability

Renewal with Hold Request

When renewing an item, the system determines if there is a pending hold request and if renewing an item with a pending hold request is allowed. If there is a pending hold request, the system checks the **Renew if Hold** check box, on the **Policies** tab of the **Circulation - Policy Definitions** workspace to determine if the renewal is allowed ([Figure 6-132](#)).



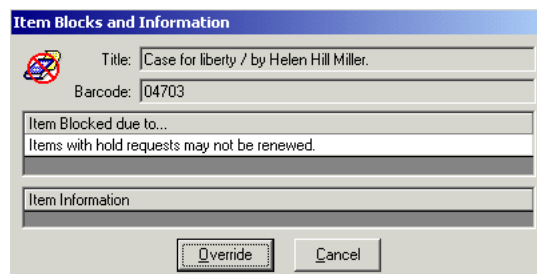
The screenshot shows the 'Edit Policy Definition' dialog box with the 'Policies' tab selected. The dialog has several tabs: Policy Definition, Locations, Policies, Calendar, Patrons, Items, Matrix, and Short Loan Matrix. The 'Policies' tab contains the following settings:

- ☒ Include Lost Item Processing Fee
- ☒ Count Closed Days/Hours/Minutes For Loan
- ☒ Apply Fixed Due Time For Overnight Loans
- ☒ Include Max Fine Amount For Lost Item
- Lost Item Processing Fee: \$15.00
- ☒ Count Closed Days/Hours/Minutes For Fine
- ☐ Renew If Overdue
- ☐ Renew If Recall
- ☐ Renew if Hold
- Short Loan Early Pickup Window: 10 Minutes
- ☒ Extend Recall Due Date
- Short Loan Unclaimed Interval: 10 Minutes

At the bottom are 'Save' and 'Cancel' buttons.

Figure 6-132. Policies tab, Renew if Hold Check Box

The block condition arises if renewing an item with a pending hold request is not allowed. [Figure 6-133](#) shows the Items with hold requests may not be renewed block message.



The screenshot shows the 'Item Blocks and Information' dialog box. It contains the following information:

- Title: Case for liberty / by Helen Hill Miller.
- Barcode: 04703
- Item Blocked due to...
Items with hold requests may not be renewed.
- Item Information

At the bottom are 'Override' and 'Cancel' buttons.

Figure 6-133. Items with Hold Requests may not be Renewed Block Message

To resolve this block, administrators can select the **Renew if Hold** check box on the **Policies** tab ([Figure 6-134](#)). For information on configuring this, see the *Voyager System Administration User's Guide*, [Policies Tab](#).

The screenshot shows the 'Edit Policy Definition' dialog box with the 'Policies' tab selected. The 'Renew if Hold' checkbox is checked. Other settings include 'Include Lost Item Processing Fee' (checked, \$15.00), 'Count Closed Days/Hours/Minutes For Loan' (checked), 'Apply Fixed Due Time For Overnight Loans' (checked), 'Include Max Fine Amount For Lost Item' (checked), 'Renew If Overdue' (unchecked), 'Renew If Recall' (unchecked), 'Extend Recall Due Date' (checked), 'Short Loan Early Pickup Window' (10 minutes), and 'Short Loan Unclaimed Interval' (10 minutes). Buttons for 'Save' and 'Cancel' are at the bottom.

Figure 6-134. Policies Tab, Renew if Hold Check Box Selected

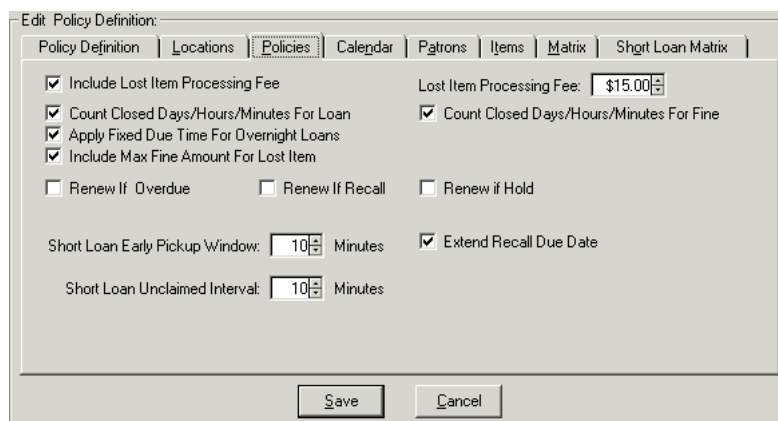
To override this block instead of resolving it, the operator must have Items with hold requests may not be renewed in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-135](#)).

The screenshot shows the 'Item Blocks' tab of the 'Circulation security profile' dialog. The 'Operator May Override' column is selected, displaying a list of override rules. The rule 'Items with hold requests may not be renewed.' is highlighted. Other rules include 'Item scheduled for a short loan request.', 'Item scheduled, cannot be charged or renewed.', 'Items with recall requests may not be renewed.', 'Overdue items may not be renewed.', 'Renewal due date in the past.', 'Renewal due date precedes current due date.', and 'TERM renewal precedes permitted'. Buttons for 'Available Item Blocks' and navigation arrows are on the left.

Figure 6-135. Items with Hold Requests may not be Renewed Override Ability

Renewal with Recall Request

When renewing an item, the system determines if there is a pending recall request and if renewing an item with a pending recall request is allowed. If there is a pending recall request, the system checks the **Renew if Recall** check box, on the **Policies** tab, of the **Circulation - Policy Definitions** workspace, to determine if the renewal is allowed ([Figure 6-136](#)).



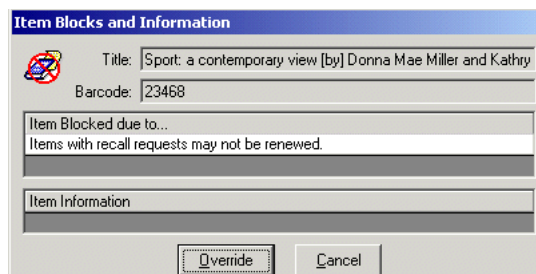
The screenshot shows the 'Edit Policy Definition' dialog box with the 'Policies' tab selected. The dialog has several tabs: Policy Definition, Locations, Policies, Calendar, Patrons, Items, Matrix, and Short Loan Matrix. The 'Policies' tab contains the following settings:

- ☒ Include Lost Item Processing Fee
- ☒ Count Closed Days/Hours/Minutes For Loan
- ☒ Apply Fixed Due Time For Overnight Loans
- ☒ Include Max Fine Amount For Lost Item
- Lost Item Processing Fee: \$15.00
- ☒ Count Closed Days/Hours/Minutes For Fine
- ☐ Renew If Overdue
- ☐ Renew If Recall
- ☐ Renew if Hold
- Short Loan Early Pickup Window: 10 Minutes
- ☒ Extend Recall Due Date
- Short Loan Unclaimed Interval: 10 Minutes

At the bottom are 'Save' and 'Cancel' buttons.

Figure 6-136. Policies Tab, Renew If Recall Check Box

The block condition arises if renewing an item with a pending recall request is not allowed. [Figure 6-137](#) shows the Items with recall requests may not be renewed block message.



The screenshot shows the 'Item Blocks and Information' dialog box. It contains the following information:

- Title: Sport: a contemporary view [by] Donna Mae Miller and Kathy
- Barcode: 23468
- Item Blocked due to...
Items with recall requests may not be renewed.
- Item Information

At the bottom are 'Override' and 'Cancel' buttons.

Figure 6-137. Items with Recall Requests may not be Renewed Block Message

To resolve this block, administrators can select the **Renew if Recall** check box on the **Policies** tab ([Figure 6-102](#)). For information on configuring this, see the *Voyager System Administration User's Guide*, [Policies Tab](#).

The screenshot shows the 'Edit Policy Definition' dialog box with the 'Policies' tab selected. The 'Renew If Recall' checkbox is checked. Other settings include 'Include Lost Item Processing Fee' (checked), 'Lost Item Processing Fee' (\$15.00), 'Count Closed Days/Hours/Minutes For Loan' (checked), 'Count Closed Days/Hours/Minutes For Fine' (checked), 'Apply Fixed Due Time For Overnight Loans' (checked), 'Include Max Fine Amount For Lost Item' (checked), 'Renew If Overdue' (unchecked), 'Renew If Recall' (checked), 'Renew if Hold' (unchecked), 'Short Loan Early Pickup Window' (10 Minutes), 'Extend Recall Due Date' (checked), and 'Short Loan Unclaimed Interval' (10 Minutes). 'Save' and 'Cancel' buttons are at the bottom.

Figure 6-138. Policies Tab, Renew If Recall Check Box Selected

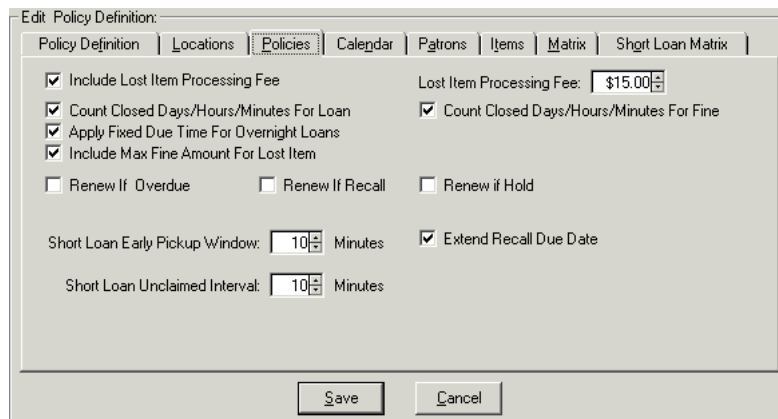
To override this block instead of resolving it, the operator must have **Items** with recall requests may not be renewed in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-139](#)).

The screenshot shows the 'Item Blocks' tab in the 'Operator May Override' section. The 'Available Item Blocks' list is empty. The 'Operator May Override' list contains several options, with 'Items with recall requests may not be renewed' selected. Other options include 'Item scheduled for a short loan request.', 'Item scheduled, cannot be charged or renewed.', 'Items with hold requests may not be renewed.', 'Overdue items may not be renewed.', 'Renewal due date in the past.', 'Renewal due date precedes current due date.', and 'TERM renewal precedes permitted'.

Figure 6-139. Items with Recall Requests may not be Renewed Override Ability

Renewal with Overdue Status

When renewing an item, the system determines if the item is overdue and if renewing an overdue item is allowed. If the item is overdue, the system checks the **Renew if Overdue** check box, on the **Policies** tab, of the **Circulation - Policy Definitions** workspace, to determine if the renewal is allowed ([Figure 6-140](#)).



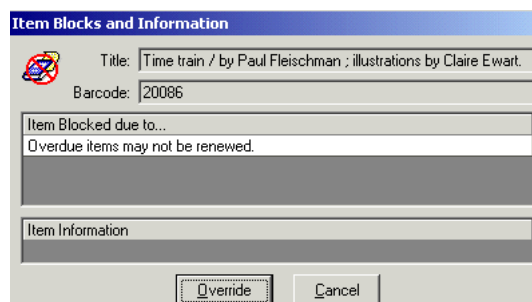
The screenshot shows the 'Edit Policy Definition' dialog box with the 'Policies' tab selected. The dialog has several tabs: Policy Definition, Locations, Policies, Calendar, Patrons, Items, Matrix, and Short Loan Matrix. The 'Policies' tab contains the following settings:

- ☒ Include Lost Item Processing Fee
- ☒ Count Closed Days/Hours/Minutes For Loan
- ☒ Apply Fixed Due Time For Overnight Loans
- ☒ Include Max Fine Amount For Lost Item
- Lost Item Processing Fee: \$15.00
- ☒ Count Closed Days/Hours/Minutes For Fine
- ☐ Renew If Overdue
- ☐ Renew If Recall
- ☐ Renew if Hold
- Short Loan Early Pickup Window: 10 Minutes
- ☒ Extend Recall Due Date
- Short Loan Unclaimed Interval: 10 Minutes

At the bottom are 'Save' and 'Cancel' buttons.

Figure 6-140. Policies Tab, Renew if Overdue Check Box

The block condition arises if the renewal is not allowed. [Figure 6-141](#) shows the Overdue items may not be renewed block message.



The screenshot shows the 'Item Blocks and Information' dialog box. It contains the following information:

- Title: Time train / by Paul Fleischman ; illustrations by Claire Ewart.
- Barcode: 20086
- Item Blocked due to...
Overdue items may not be renewed.
- Item Information

At the bottom are 'Override' and 'Cancel' buttons.

Figure 6-141. Overdue Items may not be Renewed Block Message

To resolve this block, administrators can select the **Renew if Overdue** check box on the **Policies** tab ([Figure 6-142](#)). For information on configuring this, see the *Voyager System Administration User's Guide*, [Policies Tab](#).

Figure 6-142 shows the 'Edit Policy Definition' dialog box with the 'Policies' tab selected. The 'Renew If Overdue' checkbox is checked. Other visible options include 'Include Lost Item Processing Fee' (checked), 'Count Closed Days/Hours/Minutes For Loan' (checked), 'Apply Fixed Due Time For Overnight Loans' (checked), 'Include Max Fine Amount For Lost Item' (checked), 'Renew If Recall' (unchecked), 'Renew if Hold' (unchecked), 'Short Loan Early Pickup Window' (10 Minutes), 'Short Loan Unclaimed Interval' (10 Minutes), and 'Extend Recall Due Date' (checked). The 'Lost Item Processing Fee' is set to \$15.00. 'Save' and 'Cancel' buttons are at the bottom.

Figure 6-142. Policies Tab, Renew if Overdue Check Box Selected

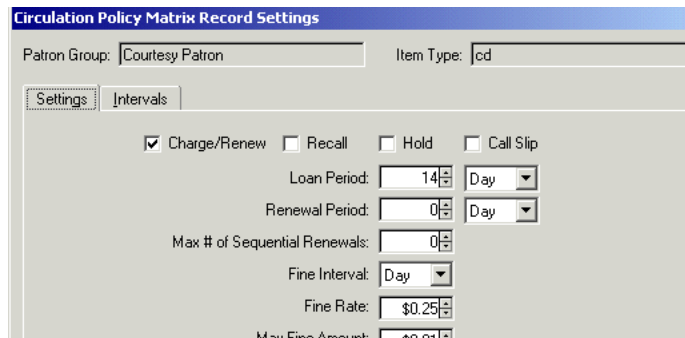
To override this block instead of resolving it, the operator must have Overdue items may not be renewed in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-143](#)).

Figure 6-143 shows the 'Circulation Security Profile' dialog box with the 'Item Blocks' tab selected. The 'Operator May Override' column is active, displaying a list of override rules. The rule 'Overdue items may not be renewed.' is highlighted. Other rules include 'Item scheduled for a short loan request.', 'Item scheduled, cannot be charged or renewed.', 'Items with hold requests may not be renewed.', 'Items with recall requests may not be renewed.', 'Renewal due date in the past.', 'Renewal due date precedes current due date.', and 'TERM renewal precedes permitted'. Navigation buttons (>, >>, <, <<) are between the 'Available Item Blocks' list and the 'Operator May Override' list.

Figure 6-143. Overdue Items may not be Renewed Override Ability

Non-renewable Item

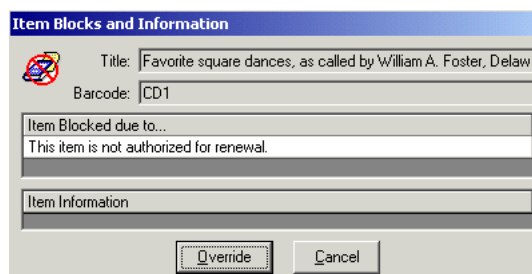
When renewing an item, the system determines if the item may be renewed. To do this the system checks the **Charge/Renew** check box and renewal period value on the **Circulation Policy Matrix Record Settings** dialog box ([Figure 6-144](#)).



The screenshot shows the 'Circulation Policy Matrix Record Settings' dialog box. It has two tabs: 'Settings' and 'Intervals'. The 'Settings' tab is active. At the top, there are two text boxes: 'Patron Group:' with the value 'Courtesy Patron' and 'Item Type:' with the value 'cd'. Below these are four checkboxes: 'Charge/Renew' (checked), 'Recall' (unchecked), 'Hold' (unchecked), and 'Call Slip' (unchecked). Under the 'Charge/Renew' checkbox, there are four text boxes with spinners: 'Loan Period:' with the value '14' and a 'Day' dropdown, 'Renewal Period:' with the value '0' and a 'Day' dropdown, 'Max # of Sequential Renewals:' with the value '0', and 'Fine Interval:' with a 'Day' dropdown. Below these are two more text boxes with spinners: 'Fine Rate:' with the value '\$0.25' and 'Max Fine Amount:' with the value '\$0.00'.

Figure 6-144. Circulation Policy Matrix Record Settings

The block condition arises if the **Charge/Renew** check box is selected, but the **Renewal Period** value is 0. [Figure 6-145](#) shows the This item not authorized for renewal block message.



The screenshot shows the 'Item Blocks and Information' dialog box. It has a title bar with the text 'Item Blocks and Information'. Below the title bar is a red 'X' icon. To the right of the icon are two text boxes: 'Title:' with the value 'Favorite square dances, as called by William A. Foster, Delaw' and 'Barcode:' with the value 'CD1'. Below these are two text boxes: 'Item Blocked due to...' with the value 'This item is not authorized for renewal.' and 'Item Information' with the value 'This item is not authorized for renewal.'. At the bottom are two buttons: 'Override' and 'Cancel'.

Figure 6-145. This Item Not Authorized for Renewal Block Message

To resolve this block, administrators can make the renewal period greater than zero ([Figure 6-146](#)). For information on editing the renewal period, see the *Voyager System Administration User's Guide*, [Matrix Tab and Circulation Policy Settings](#).

Circulation Policy Matrix Record Settings

Patron Group: Item Type:

Settings Intervals

☒ Charge/Renew ☐ Recall ☐ Hold ☐ Call Slip

Loan Period: Day

Renewal Period: Day

Max # of Sequential Renewals:

Fine Interval:

Figure 6-146. Renewal Period Greater Than Zero

To override this block instead of resolving it, the operator must have **Item not authorized for renewal** in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-147](#)).

Profile Name Operator Locations Profiles Item Blocks Patron Blocks Patron Groups

Available Item Blocks

Operator May Override

- Item not authorized for discharge at this location.
- Item not authorized for renewal.**
- Item on hold for another patron.
- Item scheduled for a short loan request.
- Item scheduled, cannot be charged or renewed.
- Items with hold requests may not be renewed.
- Items with recall requests may not be renewed.
- Overdue items may not be renewed.

Figure 6-147. Item Not Authorized for Renewal Override Ability

No Courtesy Discharge

When discharging an item at a circulation happening location that belongs to a circulation policy group other than the circulation policy group to which the item belongs, the system determines if the discharge is allowed. The system selects a circulation location from the item's circulation policy group and checks the **Courtesy Discharge** check box (on the **Settings** tab of the **Location Settings** dialog box of the **Circulation - Policy Definitions** workspace) for this location ([Figure 6-148](#)).

Settings Alerts

Default Location: Circulation Desk Default Item Type: book

Default Print Location: Circulation Desk ☐ Automated Storage

☒ Circulation Location

☒ Collect Fines ☐ Due Date Slip Print ☐ OPAC Suppress for Item on the Fly

☐ Courtesy Discharge ☐ Hold Slip Print ☐ Discharge Receipt Print

☐ Routing Slip Print ☐ Payment Receipt Print

☒ Pick Up Location

Shelving Interval: 1 Hours In Transit Interval: 5 Days

Hold Life: 5 Days Recall Life: 5 Days

Figure 6-148. Settings Tab, Courtesy Discharge Check Box

If the discharge is allowed, that is, the **Courtesy Discharge** check box is selected, an informational message displays to the operator. [Figure 6-149](#) shows the Item belongs to a foreign circ policy group's location: *Location Name* informational message.

Item Blocks and Information

Title: Sport: a contemporary view [by] Donna Mae Miller and Kathy

Barcode: 23468

Item Blocked due to...

<No Item Blocks>

Item Information

Item belongs to a foreign circ policy group's location: Main

OK Cancel

Figure 6-149. Item Belongs to a Foreign Circ Policy Group's Location Message

If the discharge is not allowed (that is the **Courtesy Discharge** check box is not selected), the block condition arises ([Figure 6-150](#)).

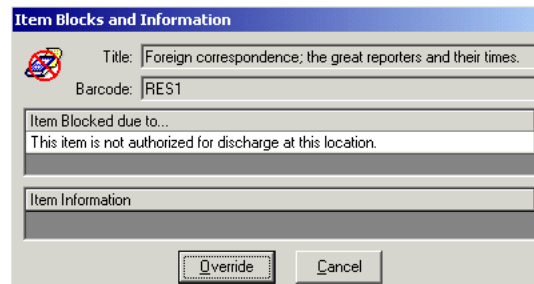


Figure 6-150. This Item is Not Authorized for Discharge at this Location Block Message

To resolve this, select the **Courtesy Discharge** check box for all the circulation locations in the item's circulation policy group. For information on configuring this, see [Circulation Locations \(Circulation Happening Locations\)](#) on [page 5-62](#).

To override this block instead of resolving it, the operator must have **Item not authorized for discharge at this location** in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-151](#)).

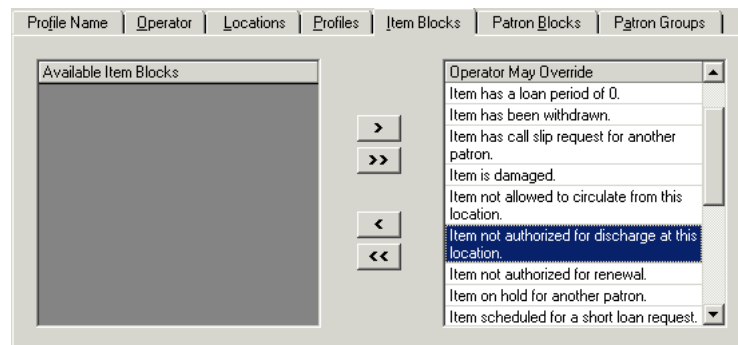
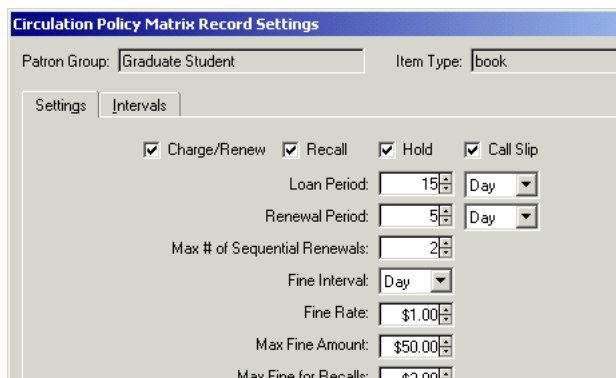


Figure 6-151. Item Not Authorized for Discharge at this Location Override Ability

Item at Renewal Limit

When renewing an item, the system compares the number of times the item has been renewed to the particular patron group-item type limit. The value in the **Max # of Sequential Renewals** field, of the **Circulation - Policy Definitions** workspace, **Matrix** tab, **Circulation Policy Matrix Record Settings** dialog box, defines the limit ([Figure 6-152](#)).

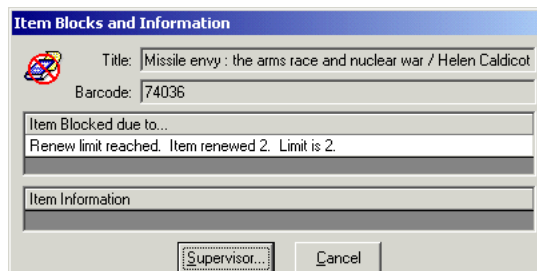


The dialog box is titled "Circulation Policy Matrix Record Settings". It has two tabs: "Settings" and "Intervals". The "Settings" tab is active. It contains the following fields and controls:

- Patron Group: Graduate Student
- Item Type: book
- ☒ Charge/Renew
- ☒ Recall
- ☒ Hold
- ☒ Call Slip
- Loan Period: 15 Day
- Renewal Period: 5 Day
- Max # of Sequential Renewals: 2
- Fine Interval: Day
- Fine Rate: \$1.00
- Max Fine Amount: \$50.00
- Max Fine for Recalls: \$0.00

Figure 6-152. Circulation Policy Matrix Record Settings dialog box

The item at renewal limit block arises when this value is met. [Figure 6-153](#) shows the Renewal limit reached block message.



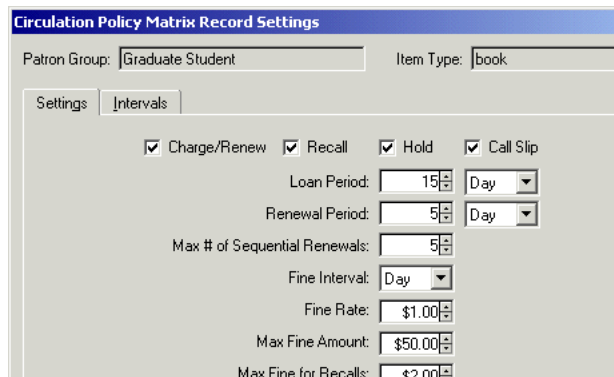
The dialog box is titled "Item Blocks and Information". It contains the following information:

- Title: Missile envy : the arms race and nuclear war / Helen Caldicot
- Barcode: 74036
- Item Blocked due to...
Renew limit reached. Item renewed 2. Limit is 2.
- Item Information

At the bottom, there are two buttons: "Supervisor..." and "Cancel".

Figure 6-153. Renewal Limit Reached Block Message

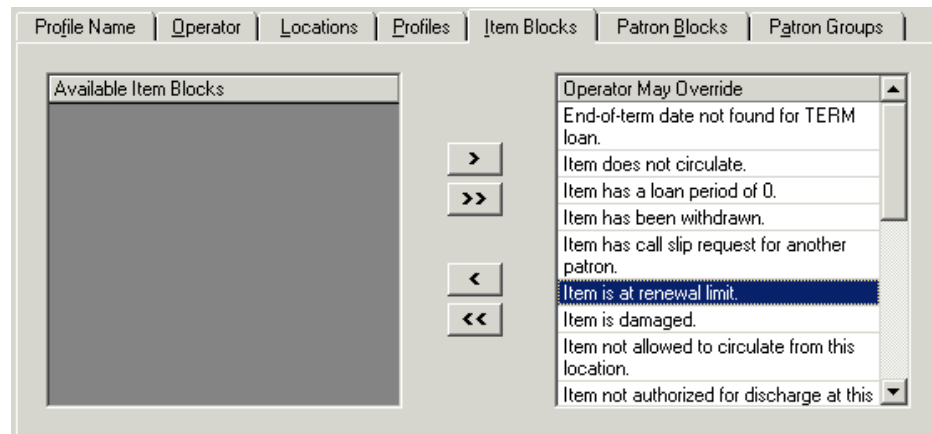
To resolve this block, administrators can increase the value for the **Max # of Sequential Renewals** ([Figure 6-154](#)). For information on editing this value, see the *Voyager System Administration User's Guide*, [Matrix Tab and Circulation Policy Settings](#).



The image shows the 'Circulation Policy Matrix Record Settings' dialog box. It has two tabs: 'Settings' and 'Intervals'. The 'Settings' tab is active. At the top, there are two input fields: 'Patron Group:' with the value 'Graduate Student' and 'Item Type:' with the value 'book'. Below these are four checked checkboxes: 'Charge/Renew', 'Recall', 'Hold', and 'Call Slip'. Under these are several numeric input fields and dropdown menus: 'Loan Period:' set to 15 with a 'Day' dropdown, 'Renewal Period:' set to 5 with a 'Day' dropdown, 'Max # of Sequential Renewals:' set to 5, 'Fine Interval:' set to 'Day', 'Fine Rate:' set to '\$1.00', 'Max Fine Amount:' set to '\$50.00', and 'Max Fine for Recalls:' set to '\$? n/a'.

Figure 6-154. Renewal Period Greater Than Zero

To override this block instead of resolving it, the operator must have **Item is at renewal limit** in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-155](#)).



The image shows the 'Circulation security profile' dialog box with the 'Item Blocks' tab selected. On the left is a large empty box labeled 'Available Item Blocks'. In the center are four buttons: '>', '>>', '<', and '<<'. On the right is a list box titled 'Operator May Override' containing the following items: 'End-of-term date not found for TERM loan.', 'Item does not circulate.', 'Item has a loan period of 0.', 'Item has been withdrawn.', 'Item has call slip request for another patron.', 'Item is at renewal limit.' (which is highlighted in blue), 'Item is damaged.', 'Item not allowed to circulate from this location.', and 'Item not authorized for discharge at this location.'.

Figure 6-155. Override Item Renewal Limit

Introduction

There are several options within Voyager System Administration that relate to the WebVoyage OPAC interface. Those options are grouped together under the heading of OPAC Configuration. The OPAC Configuration is divided into five related segments:

- Call Slip Request Messages
- Holdings vs Sort Groups
- Miscellaneous
- Patron Self-Registration
- Request Forms

Purpose

The purpose of this chapter is to describe the available options for OPAC Configuration in Voyager System Administration so that you can customize the system to match your requirements.

Call Slip Request Messages

The **Call Slip Request Messages** feature provides the capability to define messages that communicate operational information about fulfilling call slip requests. For example, staff can set up messages to communicate turnaround time for fulfilling call slip requests. This is especially useful if the library is experiencing a high volume of requests and wants to communicate that it is taking approximately an hour to fulfill call slip requests.

This feature also provides a message capability that suspends the call slip service as well as provides information to patrons regarding call slip processing. For example, library staff may want to communicate that call slip processing is being suspended for a holiday and prevent new call slip requests from being submitted.



Procedure 7-1. Creating Call Slip Request Messages

Use the following to create **Call Slip Request Messages**.

1. Click **OPAC Configuration** on the vertical taskbar.

Result: The **OPAC Configuration** window displays. See [Figure 7-1](#).

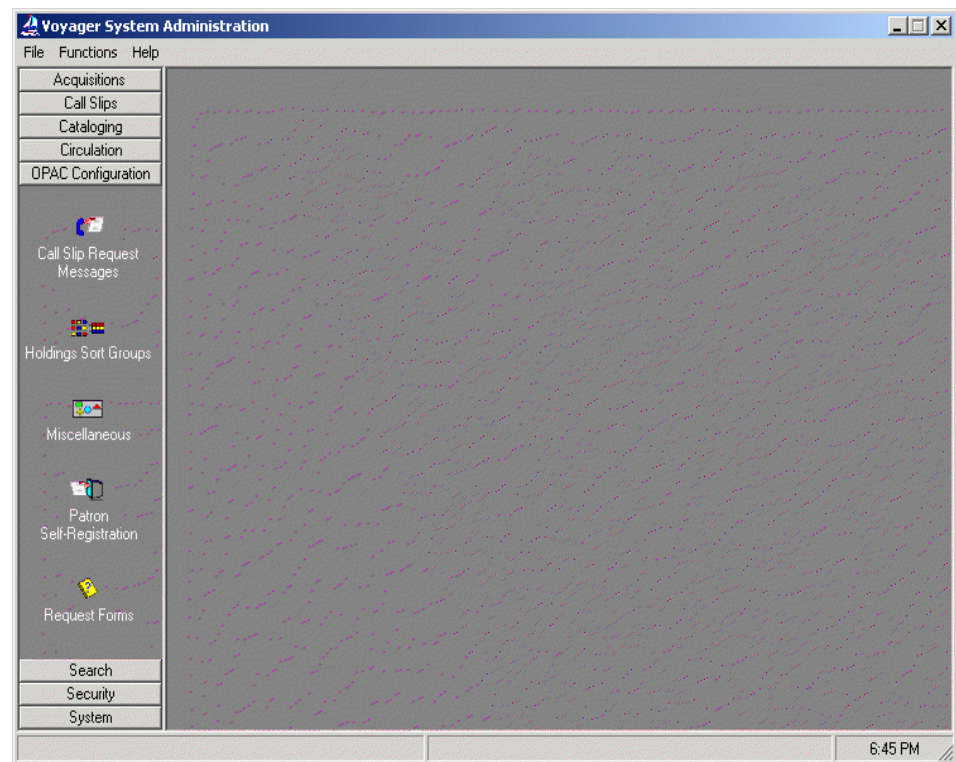


Figure 7-1. OPAC Configuration main window

2. Click **Call Slip Request Messages**.

Result: The **Call Slip Request Messages** list displays. See [Figure 7-2](#).

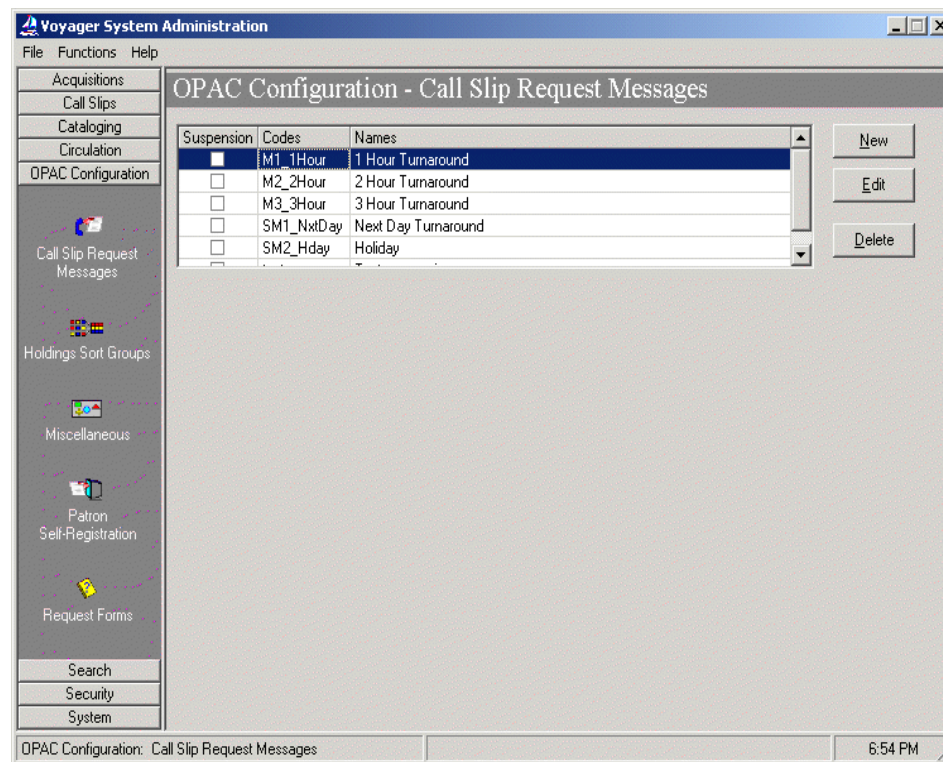


Figure 7-2. Call Slip Request Messages list

3. Click **New**.

Result: The **New Call Slip Request Messages** dialog box displays. See [Figure 7-3](#).

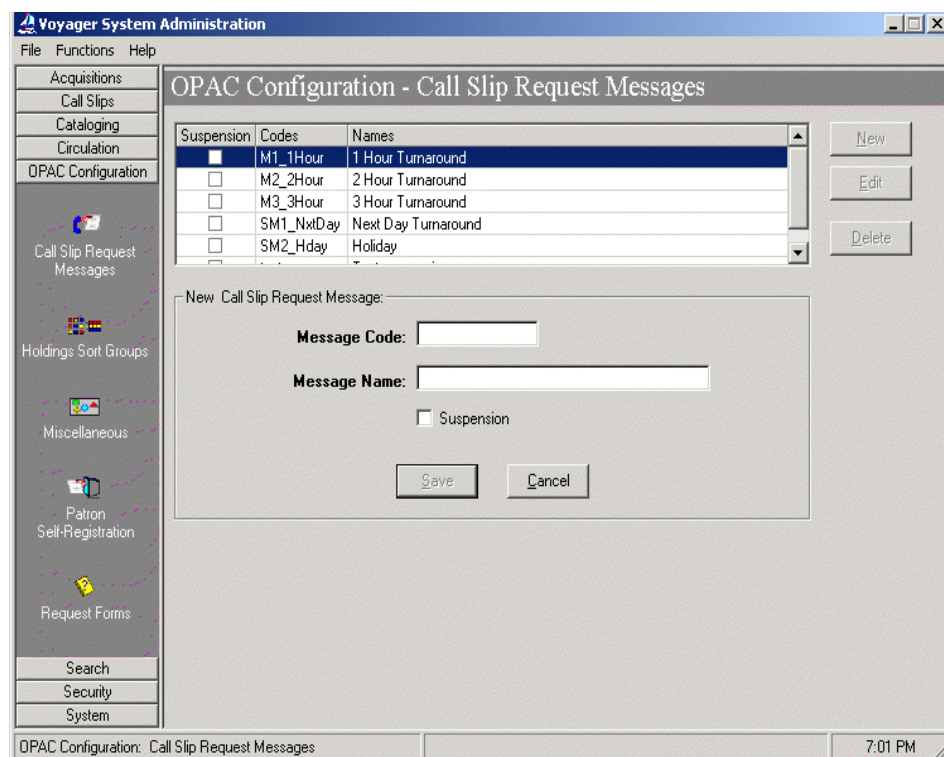


Figure 7-3. Call Slip Request Messages dialog box

4. Enter the **Message Code** and the **Message Name**.

The **Message Code** can be a maximum of 10 characters, and the **Message Name** can be a maximum of 25 characters.

Result: This creates the identification information for the call slip request message that displays in WebVoyage when it is selected.

OPTIONAL:

5. Click the **Suspension** check box.

Result: This specifies that the ability to submit new call slip requests is halted in addition to displaying the call slip request message. For example, you may want to halt the submission of new call slip requests when the “holiday” call slip request message is the selected message to display to patrons in WebVoyage.

Suspend only applies to requests made via WebVoyage. Also, suspending a message disables all callslip queues from accepting the corresponding WebVoyage requests.

NOTE:

To activate the suspension message to display requires an additional step in the Circulation module. Select **Functions>OPAC Messages** and mark the check box in the **Active** column for the message that you want displayed. A Y in the **Suspend** column indicates that the message has been identified as a suspension message in Voyager System Administration.

6. Click **Save** or click **Cancel**.

Result: This saves or cancels the call slip request message.



IMPORTANT:

Once you create these messages, they must be activated (enabled) in the OPAC Messages section of the Voyager Circulation Module.



Procedure 7-2. Editing Call Slip Request Messages

Use the following to edit **Call Slip Request Messages**.

1. Click **OPAC Configuration** on the vertical taskbar.

Result: The **OPAC Configuration** window displays. See [Figure 7-1](#).

2. Click **Call Slip Request Messages**.

Result: The **Call Slip Request Messages** list displays. See [Figure 7-2](#).

3. Select the call slip request message from the **Call Slip Request Messages** list to be edited.

Result: This highlights the call slip request message for editing.

4. Click **Edit**.

Result: This displays the **Edit Call Slip Request Messages** dialog box.

5. Make the necessary changes to the call slip request message information.

Result: The completes the editing changes for the call slip request message.

6. Click **Save** or click **Cancel**.

Result: This saves or cancels the edited call slip request message.



Procedure 7-3. Deleting Call Slip Request Messages

Use the following to delete **Call Slip Request Messages**.

1. Click **OPAC Configuration** on the vertical taskbar.

Result: The **OPAC Configuration** window displays. See [Figure 7-1](#).

2. Click **Call Slip Request Messages**.

Result: The **Call Slip Request Messages** list displays. See [Figure 7-2](#).

3. Click the line containing the call slip message you want to delete.

Result: This identifies the call slip message for deletion.

4. Click **Delete**.

Result: The **Delete Call Slip Request Message** warning window displays.

5. Click **Yes** or **No**.

Result: Choosing **Yes** deletes the call slip request message, and choosing **No** cancels the delete request.

NOTE:

This procedure only deletes the Call Slip Request Message set up in Voyager System Administration. The `callslipmsg_CODE.htm` files must be deleted separately.

Call Slip Request Message Configuration in webvoyage.properties

The content of each call slip request message is determined by the settings for `page.patronRequests.message.callslipmsg.<message code>=` in the `webvoyage.properties` file located in `/m1/voyager/xxxdb/tomcat/vwebv/context/vwebv/ui/en_US/` where `xxxdb` is your database name.



Procedure 7-4. Configuring Call Slip Request Messages in webvoyage.properties

Use the following to configure call slip request messages in `webvoyage.properties`.

1. Identify the message code(s) that you created in OPAC Configuration - Call Slip Request Messages in Voyager System Administration (see [Procedure 7-1, Creating Call Slip Request Messages](#), on page 7-2).
2. Open the `webvoyage.properties` file located in `/m1/voyager/xxxdb/tomcat/vwebv/context/vwebv/ui/en_US/` where `xxxdb` is your database name and locate the `page.patronRequests.message.callslipmsg.<message code>=` parameter.
3. Insert the Message Code from Voyager System Administration to the left of the equals sign, and then enter the message content that displays to the patron on the right side of the equals sign. See the example below.

```
#=====#
#
# Patron Requests - call slip request messages:
#   The final segment of the message codes must match those defined in SysAdmin.
#
#=====#
page.patronRequests.message.callslipmsg.SM1_NxtDay=Call slip requests should be
fulfilled by the next day.
```

4. Save your changes.

Refer to the *Voyager Circulation User's Guide* for information regarding how to select a specific message to display to patrons.

Holdings Sort Groups

The OPAC Holdings Sort Group Definitions allow you to sort the holdings for a title on the Holdings Information section of the search result record based on the location information or patron group of the patron executing the search in WebVoyage. Different sort hierarchies can be established and linked to the location of the person performing the search. This allows you to customize the holdings sort for each access group in such a way that items held at the same location as the patron executing the search can be listed before items at other locations.

This allows you to customize the search results for each access group in such a way that items held at the same location as the patron executing the search can be listed before items at other locations.

Setting up Holdings Sort Groups

Holdings Sort Groups are established according to Access Control Group (Voyager System Administration>System>Access Control Groups). For each Holdings Sort Group, you must specify to which Access Control Group(s) it applies as well as the Location order to display in WebVoyage. When a patron logs in to WebVoyage who falls under one of the Access Control Groups specified in a Holdings Sort Group, the record information is sorted by the appropriate location order.

Once you have set up your Access Control Group according to method of grouping (Domain Name, IP Address, IP Range, Patron Group), you can establish a Holdings Sort Group.

Voyager determines which Holdings Sort Group to use as follows:

1. At the beginning of a WebVoyage session, Voyager looks for a Sort Group based on the IP Address.
2. If it finds none, Voyager uses the default sort group.
3. If no default sort group is found, Voyager sorts search returned MFHD's alphabetically.
4. Once a patron logs in, Voyager checks for sort group based on that patron's patron group. If none is found, Voyager goes through the steps above again to determine the sort group.

If you plan on using Access Groups that classify by IPs or Domain Names, you need to know the locations of all of the computers running WebVoyage. This is so you can include the IPs of computers in the same location in the same Access

Group. For each group of computers at the same location, you can specify that search results be sorted with items from that location displayed before the same item at a different location.

If a patron falls under multiple Access Control Groups, Voyager uses the first Holdings Sort Group (in the Holdings Sort Group list) containing an Access Control Group to which that patron belongs.

You can also configure a default sort group for all patrons, without attaching it to any access control groups. You can use this to force all records with the location of *Main* to sort at the top.



Procedure 7-5. Adding a Holdings Sort Group

1. Click **OPAC Configuration** from the taskbar list in the Voyager System Administration module, and click **Holdings Sort Groups**.

Result: This displays the main dialog box for the OPAC Configuration - Holdings Sort Group.

2. Click the **New** button.

Result: This displays the **New Holdings Sort Group** dialog box (see [Figure 7-4](#)).

New Holdings Sort Group:

Sort Groups | Locations | Access Control Groups

Sort Group Code:

Sort Group Name:

☐ Default Sort Group

Save Cancel

Figure 7-4. New Holdings Sort Group dialog box

3. Click the **Sort Groups** tab (default).

Result: The Sort Groups options display

On the **Sort Groups** tab:

4. Enter a sort group code into the **Sort Group Code** field (8 alphanumeric character maximum).

Result: This identifies the Holdings Sort Group with a short code name.

5. Enter a sort group name into the **Sort Group Name** field (40 alphanumeric character maximum).

Result: This identifies the Holdings Sort Group with longer, more descriptive name.

6. To make this sort group the default, select the **Default Sort Group** check box.
7. Click the **Locations** tab.

Result: This displays the **Locations** dialog box (see [Figure 7-5](#)).

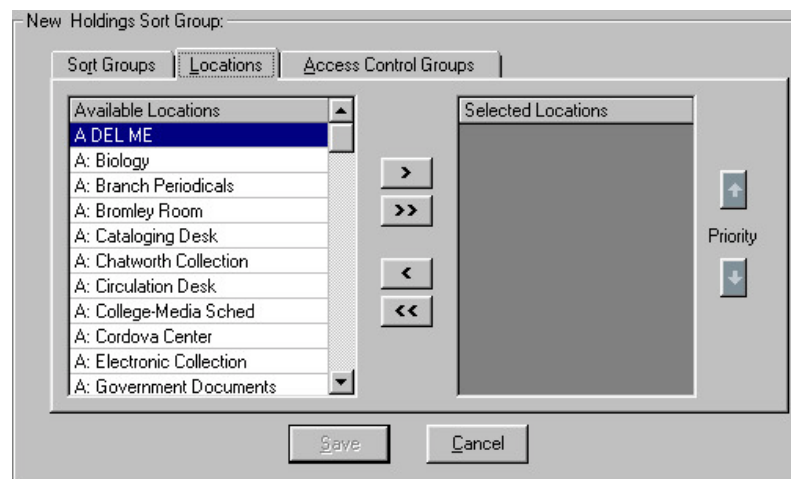


Figure 7-5. Locations tab

On the **Locations** tab:

8. Move the desired locations from the **Available Locations** list to the **Selected Locations** list using the **>** button.

Remove any unwanted locations from the **Selected Locations** list using the < button.

To change the order of the Selected Locations, select the appropriate location in the **Selected Locations** list, and move the location up using the up Priority arrow button or down using the down Priority arrow button.

9. Click the **Access Control Groups** tab.

Result: The Access Control Groups options display (see [Figure 7-6](#)).

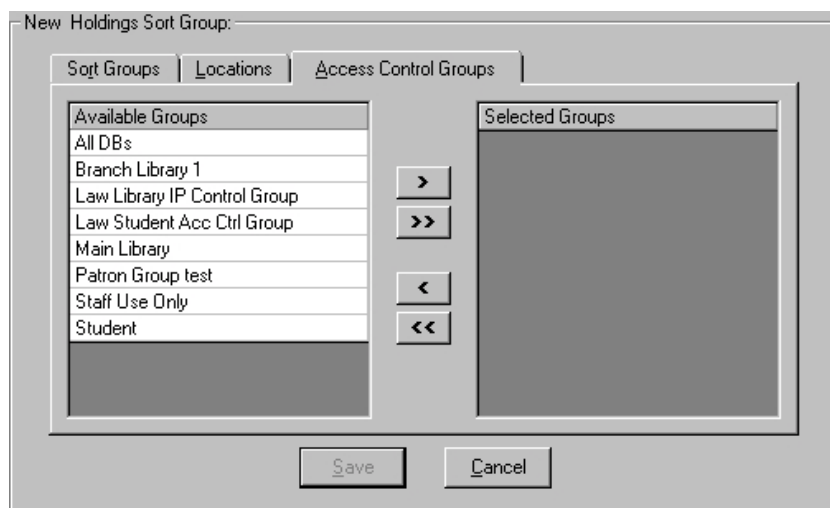


Figure 7-6. Access Control Groups tab

On the **Access Control Groups** tab:

10. Move the desired Group from the **Available Groups** list to the **Selected Groups** list using the > button.

Remove any unwanted locations from the **Selected Groups** list using the < button.

Result: This identifies and prioritizes the Groups for sorting.

11. Click **Save** or click **Cancel**.

Result: This saves or cancels the new Holdings Sort Group.

When a patron classified under one of the Access Control Groups runs a search, WebVoyage sorts the Holdings information based on the **Locations** tab settings of the first Holdings Sort Group in the Holdings Sort Group list in which the patron is defined.

Example:

The following example shows a Holdings Sort Group configured for a law library whose patrons are defined within a specific Patron Group. The example assumes the creation of a Patron Group (University Law Students), and an Access Control Group (Law Student Acc Ctrl Group) containing the law student Patron Group (see [Figure 7-7](#) and [Figure 7-8](#)).

The screenshot displays the 'System - Access Control Groups' interface. At the top, there is a table listing existing groups:

Types	Codes	Names
Patron Group	All	All DBs
Patron Group	LawPG	Law Student Acc Ctrl Group
Patron Group	patron	Patron Group test
Patron Group	StaffOnly	Staff Use Only
Patron Group	Student	Student

To the right of the table are buttons for 'New', 'Edit', and 'Delete'. Below the table, the 'Edit Access Control Group:' section is active, showing tabs for 'Group' and 'Patron Group'. The 'Group' tab is selected, displaying the following fields:

- Group Code: LawPG
- Group Name: Law Student Acc Ctrl Group
- Group Type: Patron Group (selected from a dropdown menu)

At the bottom of the edit form are 'Save' and 'Cancel' buttons.

Figure 7-7. Access Control Group used in Example

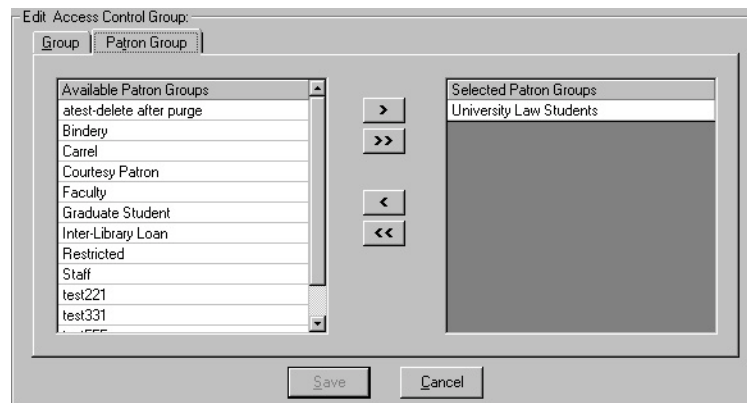


Figure 7-8. Patron Group selected in Access Control Group



Procedure 7-6. Creating Example Holdings Sort Group

1. Click **OPAC Configuration** from the taskbar list in the Voyager System Administration module, and click **Holdings Sort Groups**.

Result: This displays the main dialog box for the OPAC Configuration - Holdings Sort Group.

2. Click the **New** button.

Result: This invokes the **New Holdings Sort Group** dialog box (see [Figure 7-4](#)).

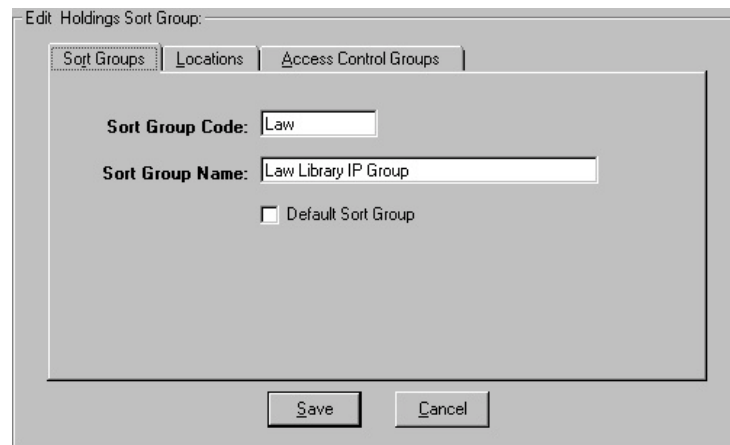


Figure 7-9. New Holdings Sort Group dialog box

3. Click the **Sort Groups** tab (default).

Result: The Sort Groups options display.

On the **Sort Groups** tab:

4. Enter the Sort Group Code for this example as **LAW**.

Result: This sets the Sort Group Code to Law.

5. Enter the Sort Group Name for this example as **Law Library IP Group**.

Result: This identifies the Sort Group Name as Law Library IP Group.

6. Click the **Locations** tab.

Result: This invokes the **Locations** dialog box (see [Figure 7-5](#)).

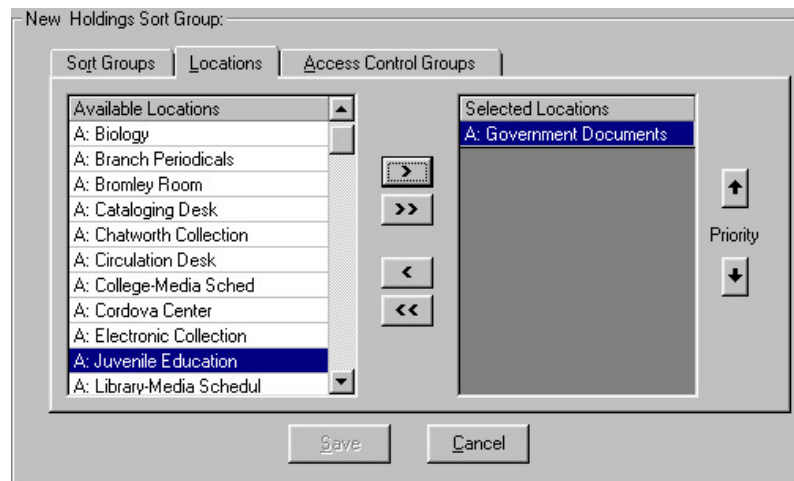


Figure 7-10. Locations tab

On the **Locations** tab:

7. Move the Government Documents location to the **Selected Locations** list.

Result: Government Documents is at the top of the list and take top priority.

8. Click the **Access Control Groups** tab.

Result: The Access Control Groups options displays (see [Figure 7-6](#)).

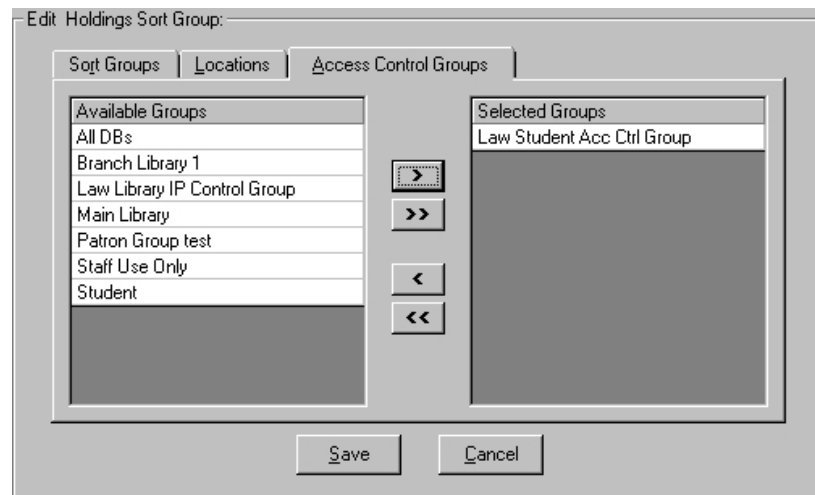


Figure 7-11. Access Control Groups tab

On the **Access Control Groups** tab:

9. Move the **Law Student Acc Ctrl** Access Control Group from the **Available Groups** list to the **Selected Groups** list using the > button.
10. Click the **Save** button.

Result: The Holdings Sort Group is saved.

Result: When a patron classified under one of the Access Control Groups runs a search, WebVoyage sorts the Holdings information based on the Locations tab settings of the first Holdings Sort Group in the Holdings Sort Group list that the patron falls under.



Procedure 7-7. Changing Sort Group Hierarchy

Sort Groups should be arranged in order of importance. If a patron is a member of more than one sort group, the first of those groups is listed in the sort hierarchy. You should consider carefully who should be part of which sort groups and what the order is so that the appropriate sort order is presented. Highest priority is given to the top of the list and lowest priority to the bottom.

Use the following to move a Sort Group higher or lower in the list.

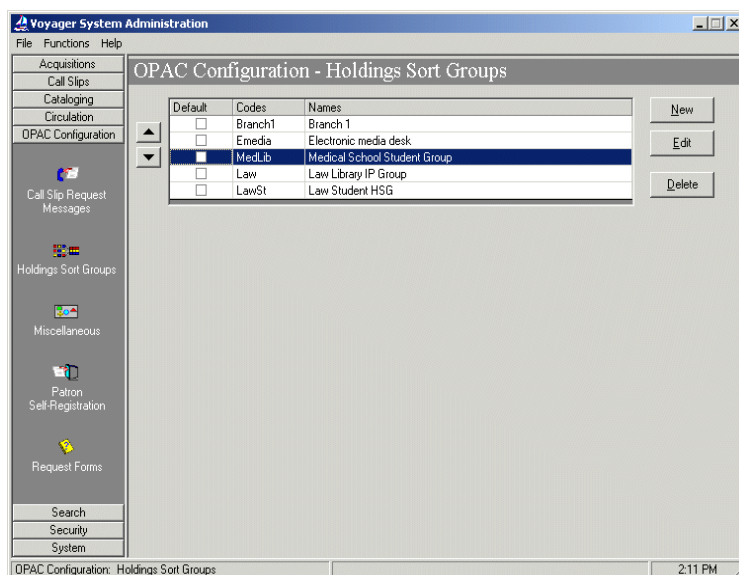


Figure 7-12. Holdings Sort Group main dialog box

Click the Set Rules button on the Holdings Sort Groups main dialog box (see [Figure 7-12](#)).

Result: The Holdings Sort Groups rules dialog box opens (see [Figure 7-13](#)).

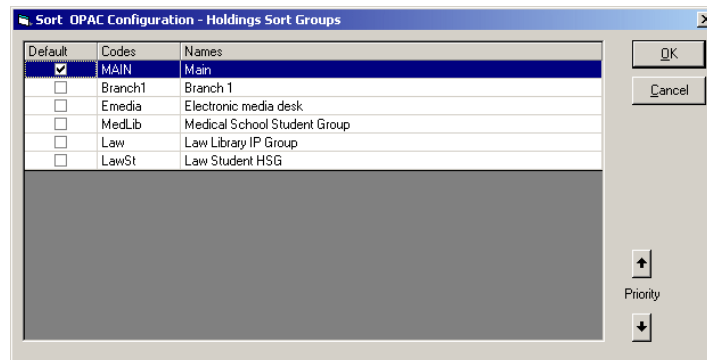


Figure 7-13. Holdings Sort Group rules dialog box

1. Highlight the Sort Group in the list.

Result: This identifies the Sort Group you want to move.

2. To move the Sort Group to the required position in the list, click the up or down arrows in the Priority section.

Result: The Sort Group is placed in the proper priority order within the sort group list.

Miscellaneous

The **OPAC Configuration - Miscellaneous** taskbar option provides the following System Administration settings for the OPAC:

- Call Slip Item Required
- Allow On-shelf OPAC Holds
- OPAC Item sort
- Set short loan advance booking days displayed (in days)
- Show no-fill statuses and copies received for (in days)
- Allow Call Slip requests when searching citation databases

See [Figure 7-14](#).

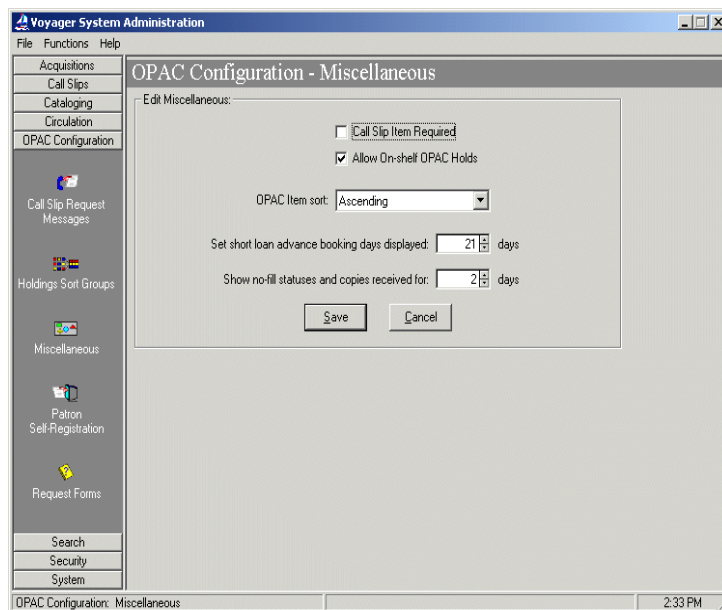


Figure 7-14. OPAC Configuration - Miscellaneous dialog box

See [Table 7-1](#) for a description of each of the **OPAC Configuration - Miscellaneous** settings.

Table 7-1. OPAC Configuration - Miscellaneous options

Option	Description
Call Slip Item Required	Select the Call Slip Item Required check box to force patrons to select an item that exists in the holdings when submitting a call slip request from a record displayed in WebVoyage. If this check box is selected but no item records exist in the holdings for a record displayed in WebVoyage, the patron is not allowed to place a call slip request. If the Call Slip Item Required check box is not selected and item records do exist in the holdings for a record displayed in WebVoyage, an additional radio button labeled Specify an issue not found in the list displays on the Call Slip request form in WebVoyage. Clicking this radio button exposes a form that allows the patron to enter specific request information that is not linked to a particular item.  TIP: <i>If the Call Slip Item Required check box is not selected and no item records exist in the holdings for a record displayed in WebVoyage, the patron is allowed to submit a request that is not linked to an item if at least one of the locations associated with the item's holdings record is defined in Call Slip Rules in the System Administration module.</i>
Allow On-shelf OPAC Holds	Select the Allow On-shelf OPAC Holds check box to allow patrons in WebVoyage to place hold requests on items that have the item status of Not Charged or Discharged. If this check box is not selected, patrons in WebVoyage are not allowed to place holds on such items.

Table 7-1. OPAC Configuration - Miscellaneous options

Option	Description
OPAC Item sort	Select from the OPAC Item sort drop-down list whether item sequences should display in ascending or descending order in the Available Items dialog box when a patron makes a request. Items are sequenced through the item sequencing activities performed in the Circulation and Cataloging modules.
Set short loan advance booking days displayed	Specify the number of days to add to the current date to identify the range of dates for which a short loan can be made.
Show no-fill statuses and copies received for	Specify how long WebVoyage should display the final status of nonreturnables, either not filled (no-fill) or copies received. This is specifically for ILL copies that a patron receives and is not required to return (nonreturnables).

Patron Self-Registration

The Patron Self-Registration feature allows patrons to enter the information required to create a patron record themselves. Patrons can then go to the Circulation Desk to have a barcode added and the expiration date changed. This allows your library to reduce staff time creating patron records, while maintaining control of the information required and barcodes attached to the patron records.

For more information about Patron Self-Registration, see the Voyager WebVoyage User's Guide.

The **OPAC Configuration - Patron Self-Registration** taskbar option provides the following System Administration settings for the OPAC:

- Circ Desk
- Set Purge
- Default Patron Group

[Figure 7-15](#) details the Patron Self-Registration components of The Voyager System Administration Module.

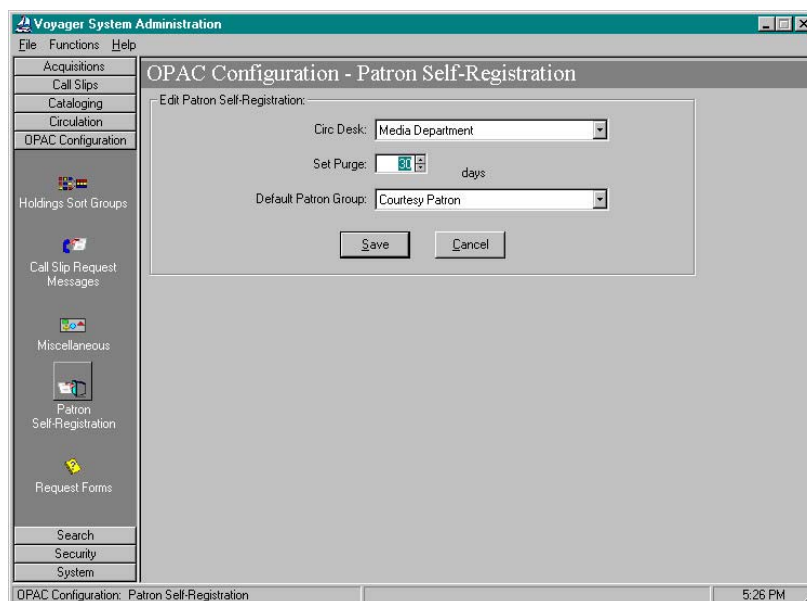


Figure 7-15. OPAC Configuration - Patron Self-Registration dialog box

See [Table 7-2](#) for a description of each of the OPAC Configuration - Patron Self-Registration settings.

Table 7-2. OPAC Configuration - Patron Self-Registration Field Descriptions

Configuration Item	Description
OPAC Circ Desk	The Circulation Desk associated with WebVoyage. Scope is limited to Patron Self-Registration.
Set Purge	This option is currently not functional.
Default Patron Group	The patron group patron records belong to. Generated automatically with patron record.

Request Forms

OPAC Configuration - Request Forms provides the capability to create, edit, and delete forms that display in WebVoyage when the patron has logged in. In general, these forms fall into one of two categories:

- System-defined forms provided with Voyager that require little or no change such as hold, recall, or short loan.

- Library-defined forms that allow for more customizing to include e-mail addresses and field specifications

For all of the patron's active patron groups, a list of available forms is returned to the WebVoyage client. Through OPAC Configuration - Request Forms you determine which patron groups and databases see the form(s) that are available through the system.

Voyager System Administration OPAC Configuration provides the following Form Types from which to select when creating and/or editing forms:

- ARTEmail Loan Form
- ARTEmail Photocopy Form
- Bib Level Form
- Blank Form
- ILL Blank Loan Request
- ILL Blank Photo Request
- ILL Loan Request
- ILL Photocopy Request
- Item Level Form
- System Form
- VDX ILL Form

Form Configuration Options

The OPAC Configuration options dynamically change with the Form Type selected and are displayed on tabs labeled as follows:

- Select Form
- Databases
- Patron Groups
- Fields
- ARTEmail

See [Figure 7-16](#) for an example of the tab options available with the ILL Loan Request Form Type.

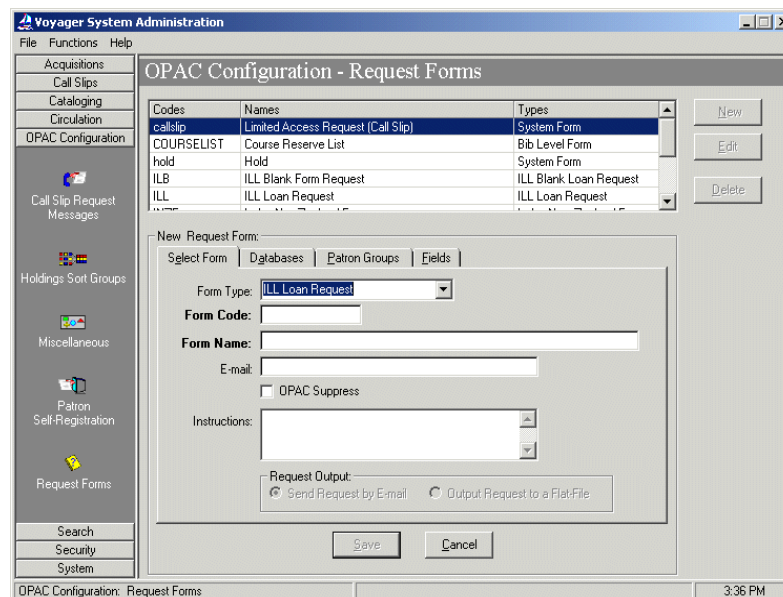


Figure 7-16. Request Forms tab options example

Since some or all of these options are available in all request types, the options are detailed in this section. The tabs available and options on them will change depending the request type. Request-type specific information about these options are detailed in each individual request type's description.

Access each of these tabs from the OPAC Configuration - Request Forms screen by selecting an existing form and clicking the **Edit** button or clicking the **New** button.



Procedure 7-8. Adding or Editing Request Forms

If you are...	Then...
Adding a new form	1. click the New button 2. Select the form type (see Table 7-8 for form types)

Result: The New Request Form dialog box displays (see [Figure 7-16](#)).

Editing an existing form	click the Edit button

Result: The Edit Request Form dialog box displays.

1. Follow the instructions for each tab the selected request contains. The instructions for editing the tabs can be found in the sections detailing the individual tabs.
-

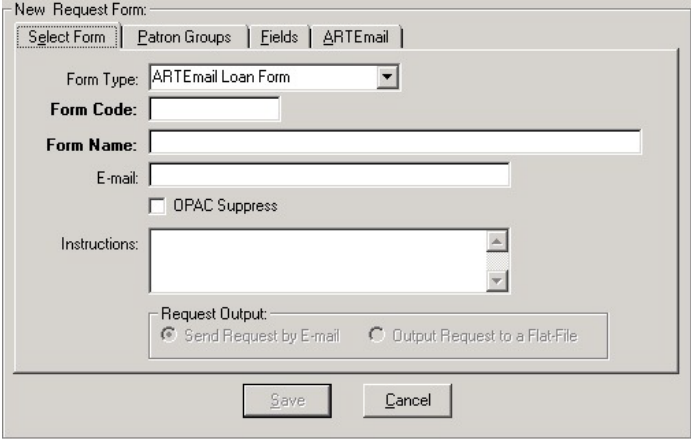
Select Form tab

The Select Form tab contains basic information about the form (see [Table 7-3](#)).

Table 7-3. Select Form Tab Components

Component	Description
Form Name	displays in WebVoyage as the selection choice and as the subject of the e-mail such as Inter-Library Loan Request.
Form Code	specifies a unique identifying code for each form
E-mail	e-mail address where the request is sent. It must be a full e-mail address such as JohnM@nnnnet.com
OPAC Suppress	Select this check box if you want the form suppressed in WebVoyage. Clear it if you want the form to appear in WebVoyage.
Instructions	Enter any instructional text that you want to have displayed on the form. What you enter here displays at the top of the request form (exactly as it is entered).
Request Output	Indicates whether the request is sent in the form of an e-mail or output to a file. These buttons are purely informational; output cannot be configured.

[Figure 7-17](#) shows the Select Form tab.



The image shows a 'New Request Form' dialog box with four tabs: 'Select Form', 'Patron Groups', 'Fields', and 'ARTEmail'. The 'Select Form' tab is active. It contains the following fields and controls:

- Form Type:** A dropdown menu currently showing 'ARTEmail Loan Form'.
- Form Code:** An empty text input field.
- Form Name:** An empty text input field.
- E-mail:** An empty text input field.
- OPAC Suppress:** An unchecked checkbox.
- Instructions:** A text area with up and down arrow buttons on the right side.
- Request Output:** Two radio buttons: 'Send Request by Email' (which is selected) and 'Output Request to a Flat-File'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Figure 7-17. Select Form Tab and Dialog Box

Databases tab

The Databases tab contains the databases (by database name as entered into Database Definitions) available for selection. Only when connected to the databases selected on this tab is the form available.



IMPORTANT:

If you do not include at least one database in the Selected Databases list box, the request form will not be available to anyone.

[Figure 7-18](#) shows the Databases tab.

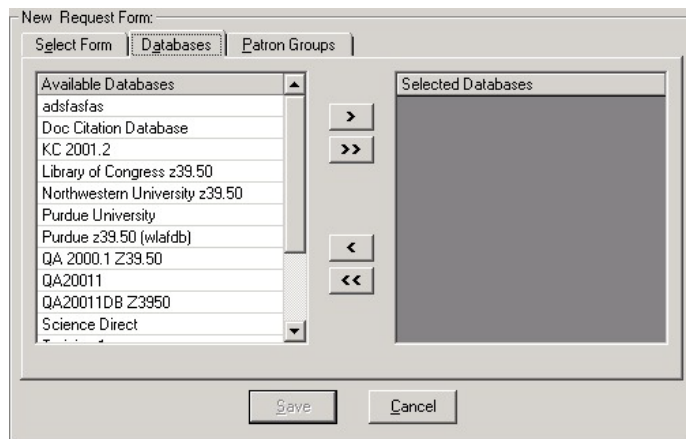


Figure 7-18. Databases Tab and List Boxes



Procedure 7-9. Editing the Databases Tab

Use the following steps to edit the selections in the Databases tab of a form:

1. Add or remove databases using the >, >>, <, and << buttons.
 - To add a database, highlight the database in the **Available Databases** list and click the > button to add it to the **Selected Databases** list.

You can add all of the available databases to the **Selected Databases** list by clicking the >> button.
 - To remove a database from the **Selected Databases** list, highlight the database and click the < button. The database moves back to the **Available Databases** list.

To remove all databases from the **Selected Databases** list, click the << button. All of the selected databases move back to the **Available Databases** list.
 2. The **Save** button saves your information. The **Cancel** button closes the dialog box without saving.
-

Patron Groups tab

The Patron Groups tab contains the patron groups (by patron group name as entered into Patron Groups) available for selection. Only patron groups selected on this tab have access to the form.



IMPORTANT:

If you do not include at least one patron group in the Selected Patron list box, the request form will not be available to anyone.

[Figure 7-19](#) shows the Patron Groups tab.

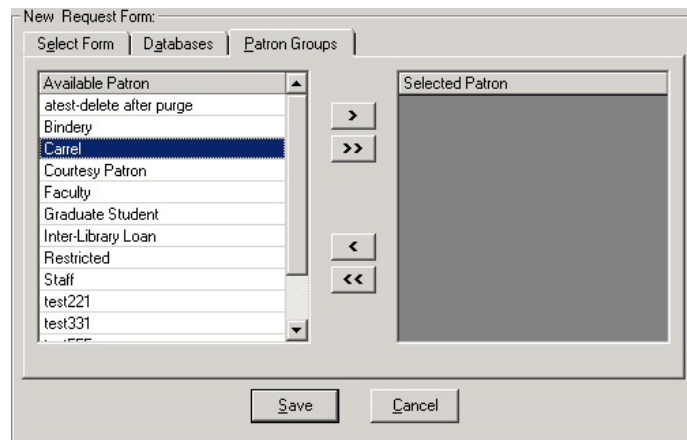


Figure 7-19. Patron Groups Tab and List Boxes



Procedure 7-10. Editing the Patron Groups Tab

Use the following steps to edit the selections in the Patron Groups tab of a form:

1. Add or remove patron groups using the >, >>, <, and << buttons.
 - To add a patron group, highlight the patron group in the **Available Patron** list and click the > button to add it to the **Selected Patron** list.

You can add all of the available patron groups to the **Selected Patron** list by clicking the >> button.

- To remove a patron group from the **Selected Patron** list, highlight the patron group and click the < button. The patron group moves back to the **Available Patron** list.

To remove all patron group from the **Selected Patron** list, click the << button. All of the selected patron groups move back to the **Available Patron** list.

2. The **Save** button saves your information. The **Cancel** button closes the dialog box without saving.
-

Fields tab

The Fields tab contains field information about the form (see [Table 7-4](#)). Again, different field options are available, depending on the Form Type selected.

Table 7-4. Select Form Tab Components

Component	Description
Clio Field	For ILL requests, specifies the Voyager ILL field to which the field corresponds. For more information about the Clio Fields, see the Voyager ILL User's Guide
OPAC Change	Determine the display and edit availability options for a field. • No Entry/No Display: the field is not editable and does not display on the request form. Information is simply mapped from a record (patron, item, and so on). • No Entry/Display: the field is not editable but the information does display on the request form • Editable: the field displays on the form and is editable. NOTE: If you select Editable, and the field also contains a mapping, the information mapped may be overridden on the request form.
Field Label	Label of the field on the request form.
mapping	MARC record field or special code (from Table 7-5) source from which to map to the request field. Voyager will retrieve the information from the appropriate place in the record and include it in the field.
Field Required	Select this check box to make the field required. Patrons will be unable to submit the request until all required fields are filled in.

[Table 7-5](#) lists the non-MARC record Field Mapping codes

Table 7-5. Field Mapping Codes

Clio Field	Possible Label	Mapping Code
Patron	Patron Name	P509
Address	StreetAddress1	P510
Address	StreetAddress2	P511
Address	StreetAddress3	P512
Address	StreetAddress4	P513
Address	StreetAddress5	P514
Address	City	P515
Address	State	P516
Address	Zip Code	P517
Address	Country	P518
Phone	Telephone	P519
Email	E-Mail Address	P527
Fax	Fax Number	P528

[Figure 7-20](#) shows the Fields tab.

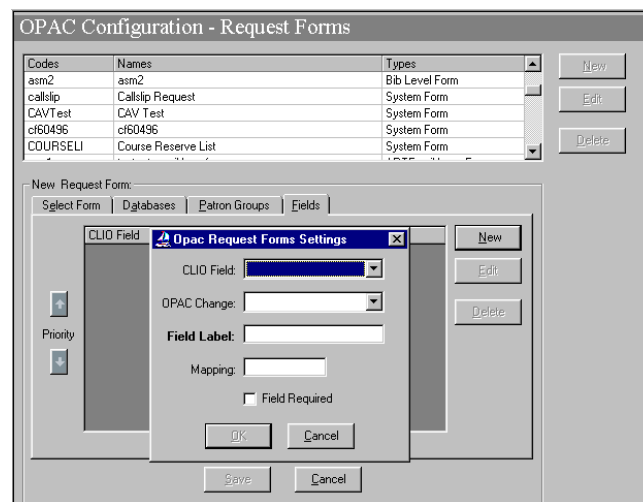


Figure 7-20. Fields Tab and Dialog Box

ARTEmail Tab

The Fields tab contains field information about the form (see [Table 7-6](#)).

Table 7-6. Select Form Tab Components

Component	Description
ARTEmail Login	Login for your ARTEmail account.
ARTEmail Pass-word	Password for your ARTEmail account.
ARTEmail Voucher Range	
Prefix	ARTE-mail system E-mail prefix issued to your institution
Start	Starting number of the allotted block of messages
End	Ending number of the allotted block of messages
Last Used	displays the message number that was last used to send a message

Voyager-Provided Forms

There are several pre-generated forms that are provided with the Voyager system. These are System Forms, and only the Form Name and instructions should be edited on these forms. See [Table 7-7](#) for a listing and description of the System forms.

Table 7-7. Voyager System Forms

Form	Description
Hold- A passive request that gives preference to a patron when the item has been returned.	The purpose of submitting a hold form is to serve as a request for a book that is checked out. Hold forms trigger a request within the system when processed against items that have been discharged.
Recall- An active request that initiates the return of an item. Loan period may be shortened as a consequence.	A recall is a patron request to return an item that has been charged out by another patron. Recalls can be placed at the item level for a specific item or the title level for the first item with the title that is returned. A recall notice is sent to the patron who currently has the item. When the item becomes available, a notice is printed to advise the requesting patron of the item's availability.

Table 7-7. Voyager System Forms

Form	Description
Short Loan	A short loan request is a reservation for an item that is made in advance for a particular time. The patron may specify a place where the item is to be picked up at a particular date and time. Like the other requests, you can specify which patron groups can and cannot submit short loans and for which items. See the <i>Voyager Circulation User's Guide</i> for more information on Short Loan requests.
Limited Access Request (Call Slip)- Staff must retrieve requested item.	Patrons submit call slip requests for items that have limited access, typically by library staff only. In OPAC Configuration, you can define specific information that displays on the form such as instructions (see the Instructions field on the Select Form tab). See the Fields tab to set volume, date, and year and indicate whether or not these fields are required for form submission. When a call slip request form is submitted, it is routed to a call slip print group and processed through Call Slip Dæmon. Rules are set in Voyager System Administration Call Slip - Rules that determine Print Group, and rules are set in Circulation that determine what items a patron may select/request through the call slip form.
UB Request	
Remote Retrieval Form	This form is only available if your library has an automated request retrieval system installed. The remote retrieval form is used in conjunction with an Automated Retrieval System (ARS). This form allows you to request an item that resides in an area with an Automated Retrieval System. You may only edit the Form Name and Instructions dialog boxes.

The remaining form types are selectable from the Form Type drop-down on the Select Form tab when creating a form. These form types have different purposes and options available when creating or editing them. See [Table 7-8](#) for a list and description of these forms.

Table 7-8. Other Form Types

Form Type	Description	Notes
ARTEmail Loan	Loan request to the British Library	Fields must be mapped to meet The British Library's requirements (see the Voyage ILL User's Guide).
ARTEmail Photocopy	Photocopy request to the British Library.	
Bib Level Form	Request for an item at the bibliographic level	
Blank Form	General request for information. Only the information entered into the form is transmitted	Majority of display configuration done in [Request Dialogs] stanza of opac.ini
ILL Blank Loan Request	Inter Library Loan request not requiring any specific record information to be available to Voyager to submit request	Used when a record is not found in an OPAC search. For more information see the Voyager ILL User's Guide.
ILL Blank Photocopy Request	Inter-Library Photocopy request not requiring any specific record information to be available to Voyager to submit request	
ILL Loan Request	Inter-Library Loan request	Used when a record is found in an OPAC search. For more information see the Voyager ILL User's Guide.
ILL Photocopy Request	Inter-Library Photocopy request	
Index New Zealand	Index New Zealand loan request	
Item Level	System sends a request based on item information currently on display	
VDX ILL	Structured email request to interact with Fretwell Downing's VDX (Virtual Document eXchange).	VDX requests are sent in the form of a structured email. The requisite fields are automatically mapped by Voyager.

NOTE:

Some components of some request forms are configured in the [Request Dialogs] stanza of the opac.ini file (such as the label for the comment field). Other forms (such as Blank Request forms) are more thoroughly configured in the [Request Dialogs] stanza (the Blank Form is configured in this stanza almost exclusively). For more information about this stanza, as well as individual request display, see the Voyager WebVoyage User's Guide.

Additional Request Form-Specific information

The following sections include additional information about some of the request forms. For more information, see the corresponding documentation for the feature and for more information about request form display, see the Voyager WebVoyage User's Guide.

Universal Borrowing (UB) Request Form

You can edit the UB request form name and any instructions for the form. In addition, a **Databases** tab is available which allows the selection of UB eligible databases to attach to the UB request form. The UB request form will only be available if the bibliographic record the patron is trying to request originates in one of the databases on the list. This form is only available if your library has the Universal Borrowing package installed. See the *Voyager Universal Borrowing User's Guide* for more information.

Remote Retrieval Form**NOTE:**

This form is only available if your library has an automated request retrieval system installed.

The remote retrieval form is used in conjunction with an Automated Retrieval System (ARS). This form allows you to request an item that resides in an area with an Automated Retrieval System. The request is automatically routed to the ARS for processing by the system. You may define the name of the form and the instructions that display on the form. The rest of the information may not be edited.

ILL E-Mail Loan and Photocopy Request

The ARTE-mail Loan Form and the ARTE-mail Photocopy Form are used to create an ARTTel-compatible structured E-mail message that can be sent to another party and read by their system. All of the ARTE-mail messages are also written to a file on the server. Each message type created in OPAC Request Forms writes to its own file on the server.

The ARTE-mail Loan Form delivers three specific types of information: Volume, Part, and Year.

The Photocopy Form delivers six different pieces of information: Volume, Part, Year, Article Title, Article Author, and Pages. You can enter unique login, password, and voucher information for each E-mail form that you create. This request can only be made for a specific item. The form is user-defined and can only be delivered by E-mail to an address that you specify.

An ARTE-mail request must be submitted from the OPAC request menu, generally by the patron.

ARTE-mail Request Export File

In addition to being e-mailed, the ARTE-mail forms are also written to a file on the server which can be copied to other systems and imported into another database.

Each form that is created generates its own export file. While the E-mail message is delivered as soon as the request is submitted, the requests are not transferred to a file until the proper batch job is run. Circjob #26, Export OPAC Requests must be run in order to transfer the records from the database to the file. Once transferred, the records are deleted from the database. See the *Voyager Technical User's Guide* for information on how to run this batch job.

The format in which the requests are to be exported can be customized. The template can be found on the server in the `/ini/` directory and is called `opacrequest.ini`. This template can be customized so that the information can be stored in any format. You can specify which fields are to be saved and how. For more information on setting up the template, see [Customizing the WebVoyage Request Export Template](#) on [page 7-39](#).

After the export, the information is saved as a text file called `opacrequest.[form code].out`, where [form code] is the code defined in the **Request Forms** dialog box. For example, the export file created for your ILL E-Mail Loan Request form with a form code of `ILL_LOAN` is named `opacrequest.ILL_LOAN.out`. Each item level form created in WebVoyage has its own file to which it saves information. This file is placed in the `/rpt` sub-directory on the server.

VDX ILL Form

VDX ILL Form requests are used to transmit ILL request information through a VDX-compatible structured E-mail message. You may have only one form of this type defined in Voyager System Administration.

The VDX ILL Form delivers information on the Client Name (the name of the person submitting the request) and any note information. This request can only be made for a specific item. The labels on each of the forms can be defined in the System Administration module. The forms can only be delivered by E-mail to the address you specify.

VDX requests

Voyager ILL includes interoperability with Fretwell Downing's VDX (Virtual Document eXchange). VDX requests are sent in the form of a structured email. The requisite fields are automatically mapped by Voyager. You may have only one form of this type defined in Voyager System Administration.

You can also include the Client ID field on the Fields tab in Voyager System Administration if you want the Patron to include their name on the request.



IMPORTANT:

The Voyager user ID of the patron making the request must match the user ID in VDX.

Item Level Request Form

The item level request form ([Figure 7-21](#)) is used when you need the patron to submit a request for a specific item and want the system to look up the item information and gather all of the information together as a single request. This type of form may only be saved to a server flat file. It does not go to the Call Slip Dæmon module or get e-mailed. The form itself may have various details edited, such as name and instructions to the patron. You may also tell Voyager what information is to be saved to the file and in what format.

Opac Request Form - Microsoft Internet Explorer

WebVoyage - Endeavor Information systems, Inc.

Database | Search | Holdings | Titles | Library | Remote | Logout | Patron | Request | Help | History | Exit

Opac Request Item Request

Title: America's light trucks

Instructions: Fill in a bunch of these fields. The ones with BOLD labels are REQUIRED!

Title

Page

Item

Barcode

Comment:

Submit Request Clear Form

Database • Library • Remote • Patron • Help

endeavor
contact us

http://207.56.64.96:7700/webvoy.htm

Figure 7-21. Item Level Request Form

The request must be submitted while a bib record is on display in WebVoyage. The request is placed for that item.

When the request is submitted, the information is stored in the database waiting to be transferred to a file.

The request is not transferred to a file until the proper batch job is run. Circjob #26, Export OPAC Requests must be run in order to transfer the records from the database to the file. Once transferred, the records are deleted from the database. See the *Voyager Technical User's Guide* for information on this batch job.

The format in which the requests are to be exported can be customized. The template can be found on the server in the /m1/voyager/xxxdb/ini sub-directory and is called opacrequest.ini. This template can be customized so that the information can be stored in any format. You can specify which fields are to be saved and how. For more information on setting up the file template, see [Customizing the WebVoyage Request Export Template](#) on [page 7-39](#).

After the export, the information is saved as a text file called opacrequest.[form code].out. Each item level form created in WebVoyage has its own file to which it saves information. The [form code] is the code defined in the **Request Forms** dialog box. This file is placed in the /m1/voyager/xxxdb/rpt sub-directory on the server.

This feature is useful when you want to transfer requests from the Voyager system to another system. For example, you may use this file to import the information into another system.

Bibliographic Level Request Form

The bibliographic level request form is used when you need for the patron to submit a request that is not for a specific item. This is a user-defined form. The form gathers information on the bib and combines the bib information and the patron information before delivering the request. This type of form may only be delivered by sending it as an e-mail to an address that you can specify.

A bib level request must be submitted from the OPAC request menu.

This feature is useful when connecting to other databases (either Z39.50 or Voyager) since the form captures bibliographic detail and sends that information along with the rest of the message.

Blank Request Form

The blank request form is used when you need the patron to enter specific information but don't need or want to relay any bibliographic or item information. The blank form allows the patron to simply enter information about the item and any comments you want to make and all the information is transmitted as is. You can customize the instructions and the address where the form is sent.

NOTE:

You are allowed one blank request form.

Customizing the WebVoyage Request Export Template

Item-level and ARTEmail Photocopy and Loan requests all write notices to a file. Upon running the Export OPAC Requests batch job, requests of these types are written to files on your server. The format of the files can be customized by editing the WebVoyage Request Export Template.

OPAC Request Export Template

When the Export OPAC Requests batch job is executed in order to process the requests, it first finds all of the new requests. Each time it finds a request, it copies the information from the form and the bib information from the MARC record being requested and saves all of this information into a data file. You can specify what data is saved and how Voyager saves it with the WebVoyage Request Export template.

For each request that the computer saves, it must refer to the WebVoyage Request Export template to tell it what information from the MARC record is to be saved and in what format it is to be saved. The template can be set up however you require so that the files are in whatever format you want. The template is a file called `opacrequest.ini` which is located in the `/m1/voyager/xxxdb/ini/` directory.

NOTE:

All of the request types use the same `opacrequest.ini` file. This means that you cannot have different templates for each type of request. You cannot have more than one `opacrequest.ini` file.

The template contains the format in which the data is to be saved. The template is made up of two different kinds of information:

- Plain text. This is transferred as-is to the data file.
- MARC field codes. Each MARC field has a code associated with it. These codes allow you to designate what information you want drawn from the database. For example, if you wanted the Bib ID information of every record requested to display in the data file, you would add the code for Bib ID (200) to the template. When the batch job is run, all of the codes that display in the template are replaced in the data file with information from the MARC fields which correspond with those codes.

Example:

If you want to have the batch job export the `bib_id`, full bib title, item barcode, patron formatted name, and patron barcode for each WebVoyage flat-file request, using pipes (|) as delimiters between each field, the template would look as follows:

```
\F200|\F202|\F401|\F509|\F525
```

The `\F` is the field code indicator so that the batch job knows that the next 3 characters read consist of the field code. The exported record looks something like:

```
12345|Goodnight Moon|ABC12345123123|Venckus, Meg  
K|MKV9875431234
```

A new line follows at the end of every record.

Users can configure the template in a variety of ways. Any text that is entered into the template is output as part of the record.

A template resembling the following:

Patron: \F509
Barcode: \F525

Title: \F201
Call No: \F301

Figure 7-22. Sample template

would be output as the following:

Patron: Susan B. Anthony
Barcode: 789107594

Title: Dollars, Quarters and You
Call No: QC9387.M55

Figure 7-23. Sample output

Note the additional line is added at the end of the text output.

Export OPAC Request Template Field Codes. Restrictions. All codes are three digits in length. Codes must be used with a \F prefix to be interpreted as the designated field. Otherwise, they are interpreted as text and the code number itself is saved to the file.

User-Definable Fields. If you have set up any additional fields in System Administration for users to enter text into, or if the request form has a fixed list of fields, the contents of those fields can be transferred to the export file. Each field that you create (or the fields that already exist) on the **Fields** tab in the **WebVoyage Request Groups** dialog box in the System Administration module matches one of the User Field Text codes (codes 103-108). Which field code corresponds to which field depends on the order in which the fields are arranged on the **Fields** tab. The first field in the list corresponds to User Field Text 1 (code 103) and so on. This field code must be entered into the Export OPAC Request template in order for the information to be transferred to the output files. (For ARTEmail Photocopy and Loan requests, the fields cannot be changed, but they are still treated in the same way.)

See [Table 7-9](#) for more information.

Table 7-9. Export OPAC Requests Batch Job (Page 1 of 3)

Field Name	Field Code	Item-Level Request	ARTE-mail Requests
Application Specific Field Codes: 100 series			
Request ID	101	Y	Y
Request Date and Time	102	Y	Y
User Field Text 1 (the first in the list)	103	Y	Y
User Field Text 2 (the second in the list)	104	Y	Y
User Field Text 3 (the third in the list)	105	Y	Y
User Field Text 4 (the fourth in the list)	106	Y	Y
User Field Text 5 (the fifth in the list)	107	Y	Y
User Field Text 6 (the sixth in the list)	108	Y	Y
User Comment	109	Y	Y
Expire Date	110	N	Y
Voucher Number	111	N	Y
Email Text	112	N	Y
Bibliographic Field Codes: 200 series			
Bib_id	200	Y	N
Title - Brief	201	Y	N
Title - Full	202	Y	N
Author	203	Y	N
Edition	204	Y	N
Holdings Field Codes: 300 series			
Mfhd_id	300	Y	N
Call Number - Display Format	301	Y	N
Call Number - Normalized	302	Y	N

Table 7-9. Export OPAC Requests Batch Job (Page 2 of 3)

Field Name	Field Code	Item-Level Request	ARTE-mail Requests
Item Field Codes: 400 series			
Item_id	400	Y	N
Item Barcode	401	Y	N
Enumeration	402	Y	N
Chronology	403	Y	N
Year	404	Y	N
Caption	405	Y	N
Free Text	406	Y	N
Copy Number	407	Y	N
Copy Information (prints nos. 402-407)	409	Y	N
Item Type	411	Y	N
Item Location (prints the temporary location if there is one; otherwise prints the permanent location)	412	Y	N
Patron Field Codes: 500 series			
Patron_id	500	Y	Y
Last Name	501	Y	Y
First Name	502	Y	Y
Middle Name	503	Y	Y
Patron Title	504	Y	Y
SSN	505	Y	Y
Institution Id	506	Y	Y
Formatted Name (prints nos. 501-503)	509	Y	Y
Address Line 1	510	Y	Y
Address Line 2	511	Y	Y
Address Line 3	512	Y	Y
Address Line 4	513	Y	Y
Address Line 5	514	Y	Y

Table 7-9. Export OPAC Requests Batch Job (Page 3 of 3)

Field Name	Field Code	Item-Level Request	ARTE-mail Requests
City	515	Y	Y
State/Province	516	Y	Y
Zip/Postal Code	517	Y	Y
Country	518	Y	Y
Phone Number	519	Y	Y
Patron Barcode	525	Y	Y
Patron Group Name	526	Y	Y
Patron Group Code	527	Y	Y

Using the Export OPAC Requests batch job, you can export data to the files. To run the job, go to the /m1/voyager/xxxdb/sbin (where xxxdb is the database user name) directory on your server and enter the following command line:

Pcircjob -j26

The files created by running the Export batch job are stored in the /m1/voyager/xxxdb/rpt sub-directory. Each file created contains one type of WebVoyage request. Each file is named according to the format opacrequest.[form code].out, where [form code] is that form's Form Code (on the **General** tab of the **WebVoyage Request Forms** dialog box in System Administration). For example, the export file created for an ILL E-Mail Loan Request form with a form code of ILL_LOAN is named opacrequest.ILL_LOAN.out.

See the *Voyager Technical User's Guide* for more information.

The Search Menu

Search Configuration includes some of the most powerful functions of the Voyager system, offering many options for searching your site's bibliographic data. Here is where you decide how to name all of the available search types; what sort options apply to the results set of a particular search type; what data displays on an index following completion of a particular search type; and what indexes to combine to create composite search types that fit the unique needs of your patrons.

You also decide here what searches will be available in the Voyager staff modules (Acquisitions/Serial, Cataloging, Circulation, and Media Scheduling - Bibliographic Media Search).

For your keyword searches, the Search menu also permits you to define weights that may be assigned when keywords are found in a specific field of the MARC bibliographic record when the system uses the relevance search engine.

Voyager is distributed with all fields weighted equally. If higher weights are assigned to certain fields, the extra weight is used by the relevance algorithms when analyzing the results of a search. Records containing keywords in fields that have a higher weight will typically receive a higher relevance ranking in the search results than records containing the same keywords in fields with a lower weight. See [Indexes - Field Weighting](#) on [page 8-61](#) for more information.

[Figure 8-1](#) shows the **Search** menu.

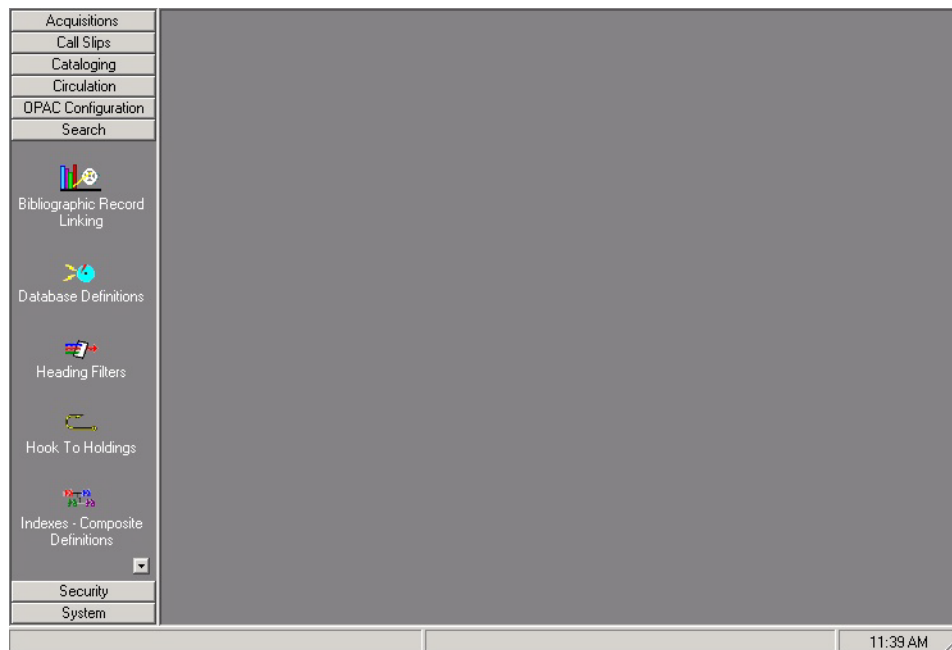


Figure 8-1. Search Menu

Voyager provides you with four index types and corresponding search types for bibliographic and related data:

- Headings Index Searches
- Keyword Index Searches
- Holdings Keyword Index Searches
- Left-Anchored Index Searches
- Call Number Index Searches

Headings Index Searches

There are six headings indexes/search types:

- WebVoyáge Name Headings Search
- Staff Name Headings Search
- WebVoyáge Title Headings Search
- Staff Title Headings Search

- WebVoyáge Subject Headings Search
- Staff Subject Headings Search

When you initiate a headings search, your search statement is applied to headings indexes that are generated from those fields in your MARC bibliographic records subject to authority control and from fields in your MARC authority records.

All six headings search types can be made available in the staff modules. They appear in the drop-down menu on the search grid along with all other search types. The WebVoyáge Headings Search types are selected on the WebVoyáge module's search tab "Headings" (the search tab label may be changed at your site).

The WebVoyáge Subject and WebVoyáge Name Headings Search types are automatically fixed in the WebVoyáge module. You may make the WebVoyáge Title Headings Search type available or not in the WebVoyáge module. If not, you may choose from one of two other title search types, one using a keyword index, the other using a left-anchored index.

The system creates your headings indexes during your initial database load. Afterwards, whenever you add a bibliographic record through online keying, online import, or the Bulk Import batch program (described in the *Voyager Technical User's Guide*), the system automatically in real time indexes all the headings fields in the new record. Real time indexing also occurs if you change or add a heading in an existing record as part of an online update operation.

When the system generates entries for the headings indexes, it applies certain rules to handle punctuation and other non-alphanumeric characters that exist in a MARC record. The same rules are also applied by the system to headings search statements.

All headings indexes are left-anchored, a headings index entry replicates the data as it appears in the indexed field, beginning with the first character of the first word in the first indexed subfield, reading to the right until it reaches the end of the field, omitting subfield delimiters, subfield codes, punctuation, and the data in any subfield that is not indexed. When punctuation is removed, no space is inserted. For example, O'Connor becomes OConnor.

In a headings search, the system reads a search statement from left to right and retrieves heading index entries only if there is a match between the characters of the search statement (read left to right) and the characters of a headings index entry (read left to right).

For a headings search in WebVoyage, the system automatically supplies a truncation symbol to the end of any headings search statement so that the search results include headings that exactly match the search statement plus those headings index entries that have more characters to the right.

The same effect can be obtained for any headings search in the staff modules by ending all headings search statements with a question mark (?), Voyager's truncation symbol, or by turning on truncation in Session Preferences in the module.

Staff or WebVoyage headings searches result in a display of headings and cross references that match the entered search statement. The number to the left of each heading indicates how many individual bibliographic records contain that heading, unless the index entry is for a cross-reference in which case no number displays.

A staff headings search includes the ability to display authority records and the cross referencing structure.

Keyword Index Searches

Voyager performs keyword indexing on all variable length fields (010-9xx) in all MARC bibliographic records in a Voyager database. This means that every discrete character string anywhere in these fields has been indexed as a keyword. This is the "keyword anywhere" index that is automatically present in both staff and WebVoyage modules.

The system creates your keyword anywhere index during your initial database load. Afterwards, whenever you add a bibliographic record through online keying, online import, or the Bulk Import batch program, the system automatically in real time indexes all the keywords in the new record. Real time indexing also occurs if you change or add a keyword in an existing record as part of an online update operation.

When the system generates entries for the keyword anywhere index, it applies certain rules to handle punctuation and other non-alphanumeric characters that exist in a MARC record. The same rules are also applied by the system to keyword search statements.

The *keyword anywhere* index retains (in its internal structure) the MARC field/subfield from which each keyword originated so that the *keyword anywhere* index can be considered a whole series of *sub-indexes* for each MARC field/subfield combination.

Example:

For example, part of the *keyword anywhere* index would be a *sub-index* of all keywords as they exist in MARC field 245/subfield |a; a sub-index for 245 |b; another one for 245 |c; another for 245 |f; and so forth. The system creates this structure automatically for you.

Because of this structure, a site can define a composite keyword search type for any combination of MARC fields/subfields or for a single MARC field/subfield. This allows users to perform keyword searches against subsets of the *keyword anywhere* index.

Example:

For example, if you want to provide for a keyword search for main titles, you could assign a Search Code, Search Name, and identify 245 |a, 245 |b, 245 |c, 245 |f, and so on, as the field/subfields that would be searched if a user selected that keyword search type. You can include as many fields/subfields as you wish for any keyword search type, overlapping them as wanted.

These composites can appear in either the staff modules or in the WebVoyáge module or both. In the WebVoyáge module, these keyword search types appear in the drop-down menu on the **Builder** search tab (the search tab label may be changed at your site). Several composite keyword search types are included in Voyager as distributed.

Certain composite keyword search types (such as TKEY and JKEY) cannot be deleted because the system expects to find them under certain conditions, but the fields/subfields defined for them can be changed. See the following for a list of composite keyword indexes as distributed and what options exist for them.

When a WebVoyáge user enters a search statement on the search tab **Keyword** or selects **keyword anywhere** on the **Builder** search tab or enters a Boolean search statement on the search tab **Boolean** (all search tab labels may be changed at any site), the system automatically applies the statement against the *keyword anywhere* index. A staff module user would select *keyword anywhere* as the search type on the search grid in the staff modules and enter a search statement.

If the search is done under the relevance search engine (automatically applied for any keyword search type that uses no Boolean operators), the system applies whatever conditions have been entered, for example, search the search statement as a phrase. It then retrieves those records that comply with the search conditions specified.

Except in the case of Title Keyword Searches, the system automatically performs exact matching for any keyword entered in a search statement, so if a user enters **computer**, the system looks *only* for that keyword.

Users may right truncate any keyword used in any keyword search statement for any keyword search type so that the system looks for variants as well. The system recognizes only right truncation, for example, the right truncation **comput?** would match on computer, computers, computing, and the like. (There is *no* automatic truncation of any keyword search statement in either WebVoyage or the staff modules. Truncation must be explicitly entered in the search statement.)

Since the system performs a keyword search looking for specific keywords, a keyword search type is *not* left-anchored, that is, the system looks for keywords regardless of the search statement's keyword order.

However, users may instruct the system to apply a keyword search statement as a phrase, read left-to-right, and retrieve only those exact matches. But the system still uses the *keyword anywhere* index or the designated keyword *sub-index*, *not* any of the left-anchored indexes.

If the keyword search statement is to be searched as a phrase, the system applies the statement *within* whatever keyword field/subfield index is designated.

For example, the record for Little Women: Or Meg, Jo, Beth and Amy (field 245 subfield |a, little women and |b or meg jo beth and amy) could be retrieved by keyword search statement phrases such as **little women** or **meg jo**, but **women or meg** would *not* retrieve this record.

Holdings Keyword Index Searches

You can search MFHD records using keywords. This is useful for finding a holdings record using a local note field, call numbers, or any field in the MFHD. This search has to be enabled by Ex Libris and the keyword index for the holdings records has to be built before you can perform Holdings Keyword searches. Contact Ex Libris for more information.

The default Holdings Keyword index in the HKEY index in Voyager System Administration. This index cannot be deleted or edited, once it is built. You may create any number of additional Holdings keyword searches, as long as the code is unique throughout all database codes in the database.

Any pre-existing HKEY index is re-coded before the holdings keyword search HKEY is created.

Each index (with the exception of the HKEY index) in Voyager System Administration>Search>Indexes - Holdings Keyword Definitions contains the following tabs and associated dialog box parameters and options:

- Index
- Definitions
- Sort Order
- Search Results

These behave and are configured in the same way as those for the Bibliographic Keyword Searches, with the following exceptions:

- The **Z39.5 Use Attribute** field does not appear on the **Index** tab.
- The **OPAC Suppress** checkbox is selected and inactive.
- The Staff Suppress checkbox displays but is always selected because MFHD Keyword Searches are not available with builder searches.
- The Search Results selection box options contain text from the **Voyager System Administration>Search>Title List Column Names** for bibliographic information because the bibliographic information appears on the **Holdings Index** dialog box in the Voyager staff module searches.

Left-Anchored Index Searches

In addition to the headings indexes, Voyager provides single-field indexes on a selected number of MARC bibliographic fields for standard numbers and titles. Since these indexes are, like the headings indexes, left-anchored, searches using these indexes operate in the same way as headings index searches. A list of fields included in the Left-Anchored indexes is included in the [Search Definition Tables](#) Appendix to this document.

The system creates your left-anchored indexes during your initial database load. Afterwards, whenever you add a bibliographic record through online keying, online import, or the Bulk Import batch program, the system automatically in real time indexes the appropriate fields in the new record. Real time indexing also occurs if you change or add data to any of these fields in an existing record as part of an online update operation.

When the system generates entries for these left-anchored indexes, it applies certain rules to handle punctuation and other non-alphanumeric characters that exist in a MARC record. The same rules are also applied by the system to any search statements applied against a left-anchored index.

The way the system generates left-anchored index entries and the way these indexes can be searched are identical to the headings indexes with one exception.

Any of these single-field indexes may be combined together to create a composite search type with its own search name. You may delete single-field indexes from these and change the **Search Name**, but the indexes themselves cannot be deleted. Voyager as distributed also includes several composite search types that include valid and invalid standard number types.

Call Number Index Searches

Call number indexes cover LC, Dewey, NLM, SuDoc, and other call number schemes as coded by the indicator value in each 852 field of the MARC holdings record. All five display in the staff modules as search types. In WebVoyage, users may enter call number searches on the **Headings** search tab. The system analyzes the call number search statement by applying its call number normalization routines. In this way, it recognizes the type of call number entered and searches the appropriate index. A list of fields included in the keyword indexes is included in the [Search Definition Tables](#) Appendix to this document.

The system creates your call number indexes during your initial database load. Afterwards, whenever you add a holdings record online, the system automatically in real time indexes the call number in the new record. Real-time indexing also occurs if you change or add data in an existing record as part of an online update operation. However, call numbers are not required to create a holdings record.

Since these indexes are left-anchored, the rules for searching are the same as for searching the other left-anchored indexes:

- Automatic right-hand truncation in WebVoyage
- Explicit truncation (supply a ?) in staff module searching unless an exact match is required

Bibliographic Record Linking

The configuration of the bibliographic record linking profiles is similar to defining duplicate detection profiles for Cataloging. You specify the details for the profile on the **Field Definition** tab and define how the results should display using the **Search Results** and **Sort Order** tabs.

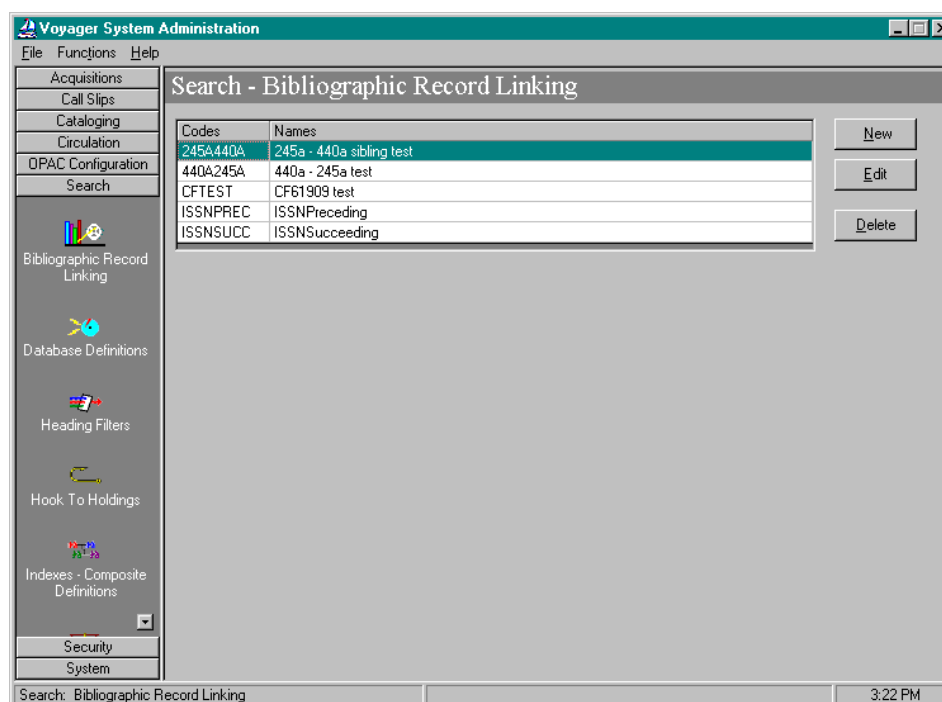


Figure 8-2. Bib Linking Main Screen

How Voyager Processes Bib Linking Profiles

[Table 8-1](#) explains how Voyager processes the Bib Linking profiles.

Table 8-1. Bib Linking Profile Decision Table

If you select:	For Example:	The system looks:
only one index and no overrides	the 022 ‡a ISSN number index	in the 022 ‡a of the source record, remembers the data in the field, then looks for other bibliographic records which have the exact same data in the same field, the 022 ‡a.
one index and one override	the 022 ‡a ISSN number index and the 780 ‡x tag and subfield override	in the 780 ‡x of the source record, remembers the data in the field, then looks for other bibliographic records which have the exact same data in the 022 ‡a.

Table 8-1. Bib Linking Profile Decision Table

If you select:	For Example:	The system looks:
more than one index with the same override	the 022 ‡a ISSN number index and the 035 ‡a system number index, each with the 780 ‡x override	in the 780 ‡x of the source record, remembers the data in the field, then looks for other bibliographic records which have the exact same data in the 022 ‡a. The system looks for other bibliographic records which have the exact same data in the 035 ‡a.
one index and one override with one or more subfields	the 780 ‡t Preceding Title index and 245 ‡a and ‡p override	in the 245 ‡a and ‡p of the source record and remember the information as one string of data. That is, if “mnop” displays in ‡a and “qrst” displays in ‡p, the system looks for other bibliographic records which have the data string “mnopqrst” in the 780 ‡t.

Exceptions to the Rule

If multiple subfields are defined, but one of the subfields defined is not present in the source record, the system uses any data it does find to search for related records.

Example:

If you have created a profile using the 780t index with a 245 ‡a ‡p override, but the source record only contains data in ‡a (such as 1234), it looks for other bibliographic records with 1234 in the 780 ‡t field.



IMPORTANT:

However, it's important to remember that if the system finds data in both subfields, it looks for the data as a single string of information. So, if you want the system to search for the data as separate pieces of information, you should define two indexes with the individual overrides.

Example:

You can create a profile using the 780 ‡t index with a 245 ‡a override, and then another 780 ‡t index with a 245 ‡p override. In this example, the system tries to find the 245 ‡a or the 245 ‡p in the 780 ‡t.

Search Results Tab

The **Search Results** tab allows you to select which information from the related records displays in WebVoyage when the profile is executed.

For example, if you select Full Title, Author, and Date, then that information displays in the resulting index list when a related records hyperlink is clicked in the source record. If search results are not defined, the system defaults to Full Title.

Sort Order Tab

The **Sort Order** tab allows you to define the order in which you want the Search Results information to display in WebVoyage.

You can choose to have the system perform up to 3 levels of sorting on the Search Results: primary, secondary, and tertiary. You are not required to define all 3 levels of sorting.

Each level includes the following sort options:

- None
- Author
- Title
- Date Published (ascending)
- Date Published (descending)

If you do not specify a sort order, the system defaults to a primary sort of Date Published (descending). See [Figure 8-9](#).



Procedure 8-1. Creating Bibliographic Record Linking Profiles

1. Click **Search** in the Voyager System Administration taskbar menu.
2. Click the **Bibliographic Record Linking** button.

NOTE:

Depending on your library's security restrictions, you may not be able to perform this function. See the *Voyager System Administration User's Guide* for more information.

Result: The **Search - Bibliographic Record Linking** list of profiles appears.

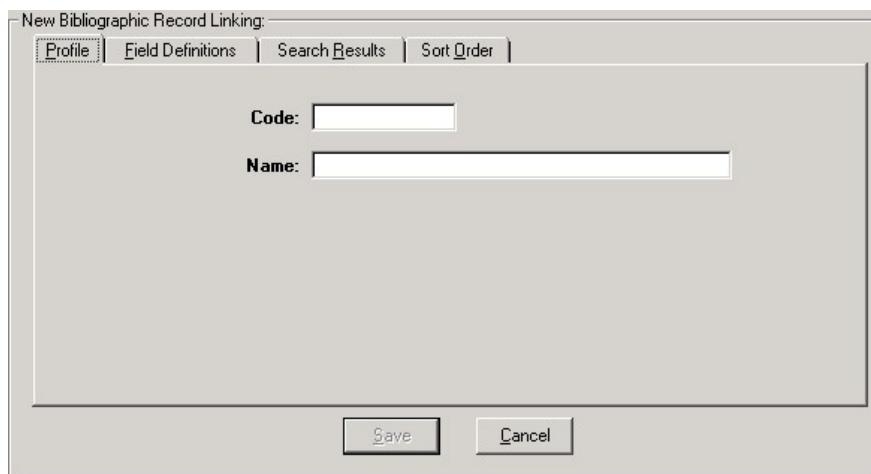
3. Open the New Bib Linking or Edit Bib Linking dialog box:

- If creating a new profile, click the **New** button.

Result: The New Bib Linking dialog box opens (see [Figure 8-3](#)).

- If editing an existing profile, click the **Edit** button.

Result: The Edit Bib Linking dialog box opens.



The screenshot shows a dialog box titled "New Bibliographic Record Linking:". It has four tabs: "Profile", "Field Definitions", "Search Results", and "Sort Order". The "Profile" tab is active. Inside the dialog, there are two text input fields: "Code:" and "Name:". At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

Figure 8-3. New Bib Linking Dialog Box

4. Select the **Profile** tab

5. On the Profile tab:

- a. Enter a code in the **Code** field.

The Profile Code can contain up to eight alphanumeric characters. Uppercase and lowercase are allowed for alpha characters. However, the system converts the code to all uppercase letters when you save the information. The code must be unique from all other profile codes. For example, ISSNPREC.

WebVoyage uses this code to search for related records in the Voyager database, by matching on the code in the display configuration files.

- b. Enter a name in the **Name** field.

The Profile Name can contain up to 25 characters. The characters can be alphanumeric, punctuation, or spaces. Uppercase and lowercase are allowed for alpha characters.

This name displays in the **Related Records** menu in the Cataloging module when the active bibliographic record contains any fields included in any existing Bib Linking profile.

NOTE:

You must add at least one index to a new profile, as well as establish a profile name and code, before you can save the profile. Until you add at least one index, the Save button will be inactive.

6. Click the **Field Definitions** tab.

The Field Definitions tab allows you to define the indexes, tags, and subfields for the system to use for bibliographic record linking (see [Figure 8-4](#)).

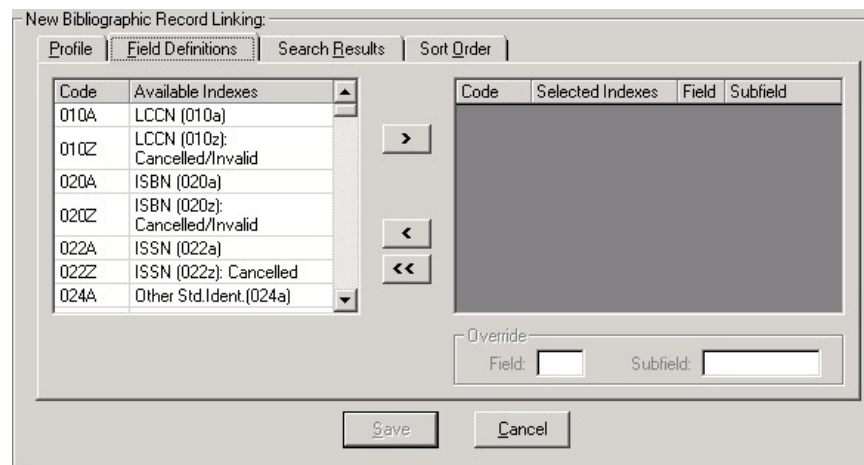


Figure 8-4. Field Definitions Tab

The **Field Definitions** tab contains a list of available indexes in the left window of the dialog box and a list of selected indexes in the right window. When an index in the lower window is highlighted, the tab refreshes to include single field and subfield override boxes.

The list of available indexes contains most of the left-anchored indexes that you define in *Voyager System Administration* (for more information, see [Indexes - Headings & Left-Anchored Definitions](#) on [page 8-64](#)).

7. On the Field Definitions tab:
 - a. To add an index, highlight the index in the **Available Index** list and click the > button to add it to the **Selected Indexes** list. The selected index displays in the Selected Indexes window and the Field Override and Subfield Override fields display, [Figure 8-5](#). To remove an index from the **Selected Indexes** list, highlight the index and click the < button. The index moves back to the **Available Indexes** list. To remove all indexes from the **Selected Indexes** list, click the << button. All of the selected indexes move back to the **Available Indexes** list.

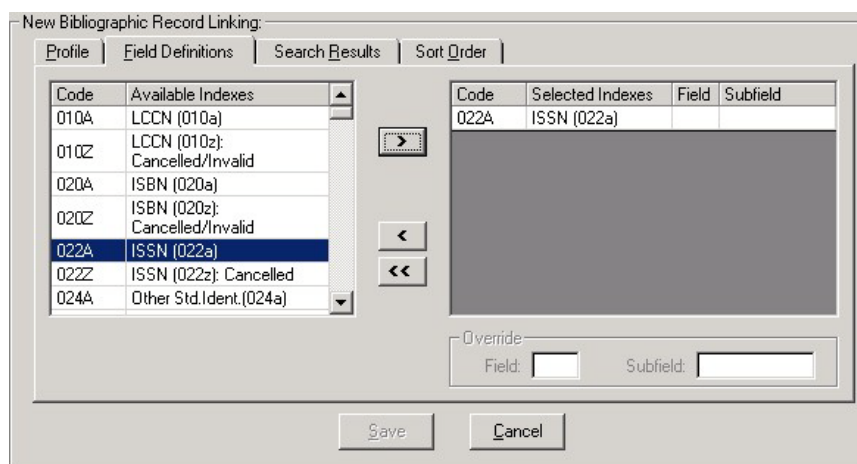


Figure 8-5. Field Definitions Tab with Index Selected and Override Boxes Displayed

If you select multiple indexes, Voyager begins with the first index selected and continues through all the Selected Indexes until it finds matching bibliographic records.

For more information about how the system searches for related records based on the index selected on the **Field Definitions** tab, see [How Voyager Processes Bib Linking Profiles](#) on [page 8-9](#).



IMPORTANT:

There is no limit to the number of indexes you can select for a profile. However, a large number of indexes has a significant impact on the processing ability of the system. The WebVoyage display of related records slows down considerably.

NOTE:

You must add at least one index to a new profile, as well as establish a profile name and code, before you can save the profile. Until you add at least one index, the Save button will be inactive (see [Figure 8-6](#)).

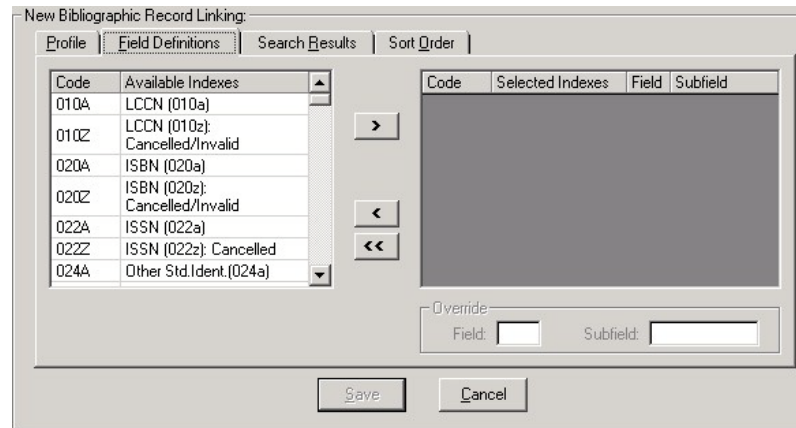


Figure 8-6. Save Button Inactive

- b. Enter a numeric value specifying a MARC tag from 010 to 999 (3-character limit), in the **Field Override** field.

You can also include the 001 tag in the **Field Override** field in order to relate records by the Voyager Bibliographic ID number of the source record.

**IMPORTANT:**

If you specify the 001 tag in the Field Override field, you are not required to enter a subfield in the Subfield Override field.

In fact, any alpha value added to the **Subfield Override** field for the 001 tag is erased upon saving the information. The 001 tag is the only tag that does not require a subfield override.

- c. Enter an alpha value (10-character limit) in the **Subfield Override** field.

NOTE:

You can define multiple indexes with multiple subfield overrides, or the same index with multiple subfield overrides.

8. Click the **Search Results** tab.
 - a. Highlight the desired element in the **Available Bib Text** column (see [Figure 8-7](#)) and click the > button to add it to the **Selected Bib Text** column. You can select up to three elements for each profile. To remove an element from the **Selected Bib Text** column, highlight the element and click the < button.
-

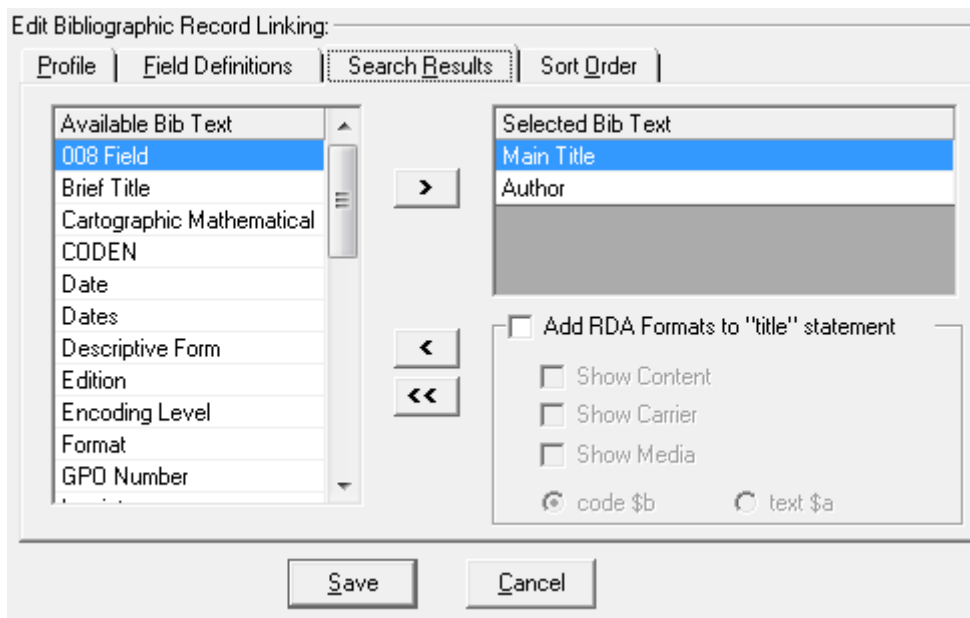
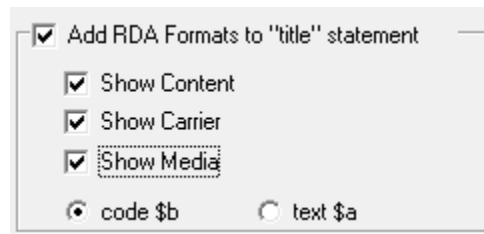


Figure 8-7. Search Results Tab with Bib Text Selected

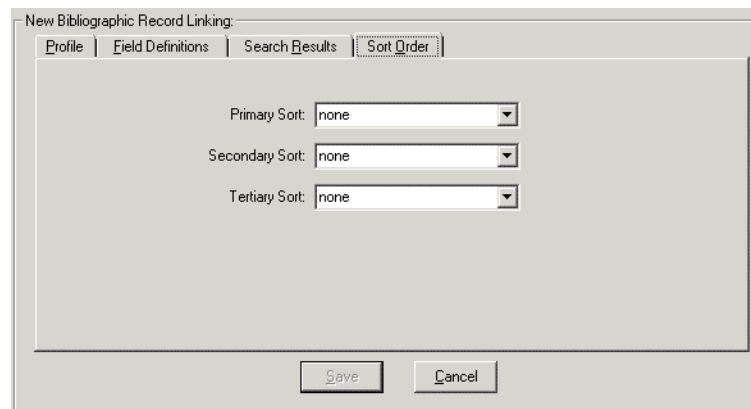
- b. If you are using RDA formats in your Bibliographic Record Linking profile, identify the RDA formats to add to the title statement by selecting **Add RDA formats to the title statement** and selecting one or more of the following options and identifying whether you want the code or text to display in your search results by selecting \$b or \$a:
 - Show Content
 - Show Carrier
 - Show Media



A dialog box titled "Add RDA Formats to 'title' statement". It contains four checked checkboxes: "Add RDA Formats to 'title' statement", "Show Content", "Show Carrier", and "Show Media". At the bottom, there are two radio buttons: "code \$b" (selected) and "text \$a".

Figure 8-8. RDA Formats to Add to the Title Statement

9. Click the **Sort Order** tab and select your Primary Sort, Secondary Sort, and Tertiary Sort preferences.



A dialog box titled "New Bibliographic Record Linking:" with four tabs: "Profile", "Field Definitions", "Search Results", and "Sort Order" (selected). The "Sort Order" tab contains three dropdown menus labeled "Primary Sort:", "Secondary Sort:", and "Tertiary Sort:", all of which currently show "none". At the bottom are "Save" and "Cancel" buttons.

Figure 8-9. Sort Order Tab with Primary Sort Defined

10. Click the **Save** button to save your information or click the **Cancel** button to close the dialog box without saving.

Database Definitions

Database Definitions contains configuration settings for databases used by Voyager.

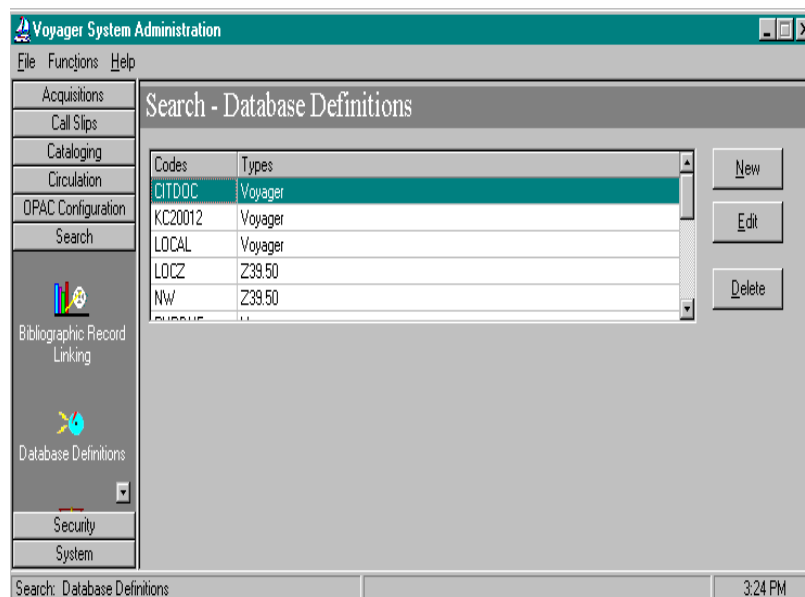


Figure 8-10. Database Definitions Main

Your Voyager and Z39.50 databases can be defined in **Search>Database Definitions**. The **Search** menu is located in the Voyager System Administration menu bar.

A database definition allows you to maintain the searching databases you access using the Voyager modules.

The **Database Definitions** dialog box (see [Figure 8-11](#)) can contain the following sections/tabs (depending on the options selected):

- Database
- Definitions
- Attributes (only available if the **Z39.50** button is selected)
- Remote Cluster Cache (only available if the **UB** box is checked)
- Access Control (only available if the **Public Use** box is unchecked)

Figure 8-11. Database Definitions dialog box

Adding or Editing a Database

To add or edit a database, configure the individual tabs of the **Database Definitions** dialog box.

If you are...	Then...
Adding a new database	Click the New button.

Result: The New Database Definitions dialog box displays (see [Figure 8-11](#)).

Editing an existing profile	1. Select the appropriate profile. 2. Click the Edit button.

Result: The Edit Database Definitions dialog box displays.

Database Tab

The **Database** tab contains the following information for your database:

- Database name
- Database code
- Description
- Protocol (Voyager or Z39.50)

- Type (standard bibliographic or citation)
- Staff, UB, and Public Access options



Procedure 8-2. Configuring the Database Tab

1. Select the **Database** tab.

Result: Invokes the Database tab dialog box (see [Figure 8-12](#))

New Database Definition:

Database Definitions

Code:

Name:

Description:

Protocol

☒ Voyager Database ☐ Z39.50 Database

Type

☒ Bibliographic ☐ Citation

☒ Public Use ☐ UB ☐ Staff Suppress

Save Cancel

Figure 8-12. Database Tab

2. Enter the **Database Code** for the database you are adding. This is the same code entered into the connect .ini file to display this database for selection in the Databases screen of WebVoyage.

NOTE:

This code is limited to eight characters.

3. Select the **Public Use** check box if you want this database to be available to all users. If the **Public Use** check box is checked, the **Access Control** tab does not display. If you do not select the **Public Use** check box, you must select access groups to be authorized to access the database on the **Access Control** tab.

**IMPORTANT:**

*If you do not select the **Public Use** check box and you do not select at least one access group on the **Access Control** tab, the database is never available through WebVoyáge.*

4. Select the **UB** box to allow cluster and patron information from remote clusters to be refreshed in the Remote Cluster Cache.

NOTE:

If the **UB** box is not checked, the **Remote Cluster Cache** tab does not display.

5. Select the **Staff Suppress** box to hide the database from Voyager Cataloging.
6. Define the database as a Voyager database or a Z39.50 database by selecting the **Voyager Database** check box or the **Z39.50 Database** check box.

NOTE:

If the Voyager Database check box is checked, the Attributes tab does not display.

7. Define the database as a bibliographic or citation database by selecting the **Bibliographic** check box or the **Citation** check box.
8. The **Save** button saves your information. The **Cancel** button closes the dialog box without saving.

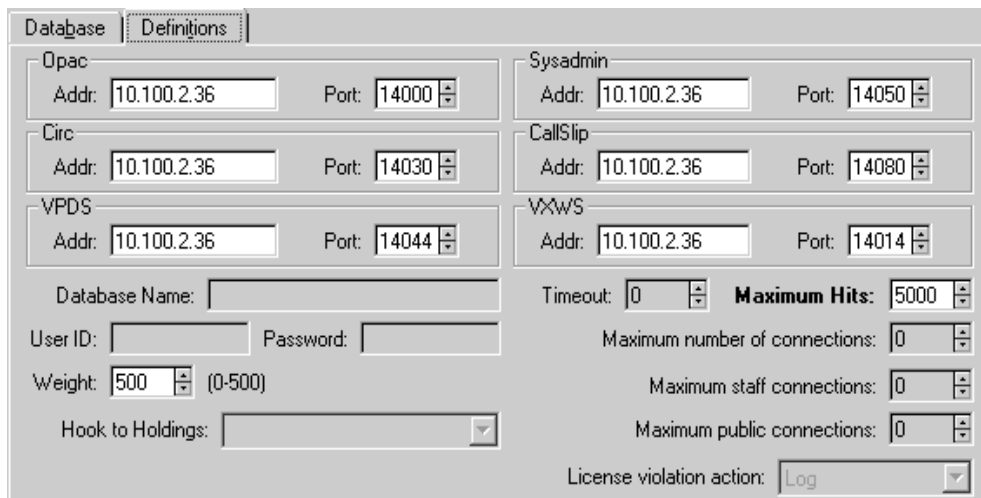
Definitions Tab

The **Definitions** tab contains the following information for your database:

- Server IP address and port information
- Remote database connection information
- Hook to Holdings profile (if Citation Server is installed)
- Connection and license settings
- Source character set (only available for Z39.50 databases)

NOTE:

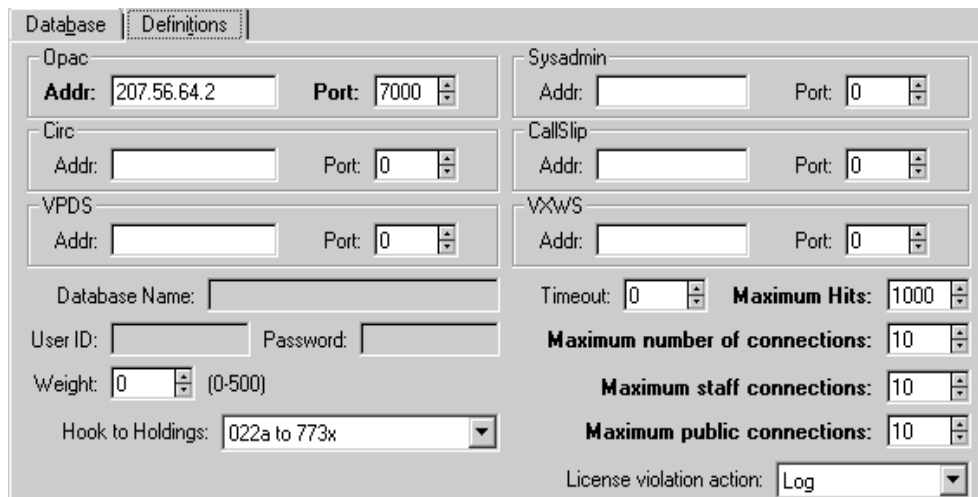
Based on the database protocol and other options selected on the **Database** tab, different options appear on the **Definitions** tab (see [Figure 8-13](#), [Figure 8-14](#) and [Figure 8-15](#)). For a summary of the fields on the **Definitions** tab, see [Table 8-2](#).



The screenshot shows the 'Definitions' tab in the Voyager Bibliographic system. It contains several configuration sections:

- Opac:** Addr: 10.100.2.36, Port: 14000
- Circ:** Addr: 10.100.2.36, Port: 14030
- VPDS:** Addr: 10.100.2.36, Port: 14044
- Sysadmin:** Addr: 10.100.2.36, Port: 14050
- CallSlip:** Addr: 10.100.2.36, Port: 14080
- VXWS:** Addr: 10.100.2.36, Port: 14014
- Database Name:** (empty text field)
- User ID:** (empty text field), **Password:** (empty text field)
- Weight:** 500 (0-500)
- Hook to Holdings:** (empty dropdown menu)
- Timeout:** 0
- Maximum Hits:** 5000
- Maximum number of connections:** 0
- Maximum staff connections:** 0
- Maximum public connections:** 0
- License violation action:** Log

Figure 8-13. Definitions Tab (Voyager Bibliographic)



The screenshot shows the 'Definitions' tab in the Voyager Citation system. It contains several configuration sections:

- Opac:** Addr: 207.56.64.2, Port: 7000
- Circ:** Addr: (empty), Port: 0
- VPDS:** Addr: (empty), Port: 0
- Sysadmin:** Addr: (empty), Port: 0
- CallSlip:** Addr: (empty), Port: 0
- VXWS:** Addr: (empty), Port: 0
- Database Name:** (empty text field)
- User ID:** (empty text field), **Password:** (empty text field)
- Weight:** 0 (0-500)
- Hook to Holdings:** 022a to 773x
- Timeout:** 0
- Maximum Hits:** 1000
- Maximum number of connections:** 10
- Maximum staff connections:** 10
- Maximum public connections:** 10
- License violation action:** Log

Figure 8-14. Definitions Tab (Voyager Citation)

New Database Definition:

Database | **Definitions** | Attributes

Opac
 Addr: Port:

Sysadmin
 Addr: Port:

Circ
 Addr: Port:

CallSlip
 Addr: Port:

Database Name: Timeout: Maximum Hits:

User ID: Password: Maximum number of connections:

Weight: (0-500) Maximum staff connections:

Hook to Holdings: Maximum public connections:

Source Character Set: License violation action:

Figure 8-15. Definitions Tab (Z39.50 Bibliographic)

[Table 8-2](#) describes the **Definitions** tab fields.

Table 8-2. Definitions Tab Fields (Page 1 of 4)

Field	Description
OPAC Addr	IP Address of the target server's database.
OPAC Port	Port of the target server's database.
Sysadmin ¹ Addr	IP Address of the target server's database.
Sysadmin ¹ Port	Port of the target server's database.
Circ ¹ Addr	IP Address of the target server's database.
Circ ¹ Port	Port of the target server's database.
CallSlip ¹ Addr	IP Address of the target server's database.
CallSlip ¹ Port	Port of the target server's database.

Table 8-2. Definitions Tab Fields (Page 2 of 4)

Field	Description
VPDS Addr	IP Address of the VPDS server. See VPDS on page 8-27 . See also RESTful Web Services on page 8-27 .
VPDS Port	Port of the VPDS server. See VPDS on page 8-27 . See also RESTful Web Services on page 8-27
VXWS Addr	Voyager database IP address for VXWS. See RESTful Web Services on page 8-27
VXWS Port	Voyager database port for VXWS. See RESTful Web Services on page 8-27
Database Name ²	Name of the target database, as required by the vendor. NOTE: Obtain this information from the database vendor.
User ID ²	User ID for the target database, as required by the vendor. NOTE: Obtain this information from the database vendor.
Password ²	Password for the ID for the target database, as required by the vendor. NOTE: Obtain this information from the database vendor.

Table 8-2. Definitions Tab Fields (Page 3 of 4)

Field	Description
Weight	Weight is a priority setting for the particular database when searching multiple databases. If a title comes from multiple databases, the one with the higher weight will be kept while the lesser is merged out. 0-500 Higher number=higher priority Default=100 NOTE: Access to the lower priority record's holdings is still made available.
Hook to Holdings ³	Indicate which Hook to Holdings profile to use with this database. Profiles created in Search> Hook to Holdings. NOTE: See Hook To Holdings on page 8-45.
Source Character Set ²	If any bibliographic z39.50 database connections have been configured, select the expected character set of the incoming records. Select from drop-down menu.
Time-out	Amount of time Voyager will wait to connect to the database before quitting and producing an error message.
Maximum Hits	Maximum number of titles to be retrieved during a search. 1-5000.

Table 8-2. Definitions Tab Fields (Page 4 of 4)

Field	Description
Maximum number of connections	Maximum number of concurrent connections allowed to the database. 0 to 9999. Determine this number based on your license provisions. NOTE: Use for general connection restrictions. Use Maximum staff connections and Maximum public connections to restrict more specifically.
Maximum staff connections	Maximum number of concurrent staff connections allowed to the database. 0 to 9999. Determine this number based on your license provisions. NOTE: Use in conjunction with Maximum public connections.
Maximum public connections	Maximum number of concurrent public (non-staff) connections allowed to the database. 0 to 9999. Determine this number based on your license provisions. NOTE: Use in conjunction with Maximum staff connections.
License violation action	Establish what Voyager does when maximum number of connections is exceeded. Block= Prevents patron from connecting to database. Log= Allows patron to connect to database, logging the offending connection(s) to a log file. NOTE: The log file in which each license violation is recorded is: /m1/voyager/xxxdb/log/log.voyager.

- 1 Fields only used with Universal Borrowing with multiple clusters.
- 2 Field only active for Z39.50 databases.
- 3 Field only active for Citation databases.

Z39.50 Connections

To enable Z39.50 connections, the following three components need to be defined on the Database Definitions tab:

- IP
The IP value (placed in the OPAC Addr: field) is either the Voyager server external IP or DNS (Domain Name Server) name.
- Port
The port value needs to be xx90 (usually 7090) where you supply the xx values for your location.
- Database
The database value (placed in the Database Name field) is Voyager.

See [Figure 8-15](#) for the fields referenced on the Database Definitions tab.

VPDS

VPDS is the Voyager data provider to PDS (Patron Directory Services) that is used for authentication in a Primo environment. VPDS passes the patron's home database information to PDS for authentication. The VPDS IP address and port are set at installation.

With VPDS, the **Database** tab is set up with the following:

- Protocol = Voyager Database

In order for patrons using Primo to place a request, complete and correct patron information is required. VPDS enables the verification of patron information/authentication to include patron group.

For more information regarding Voyager/Primo integration, see the *Voyager Primo Integration User's Guide*.

RESTful Web Services

Voyager provides RESTful Web Services in support of the DLF ILSDiscovery Interface (DI) initiative. The Voyager RESTful Web Services make Voyager resources exportable and enable client discovery tools that you can use to build a

suite of interfaces for the library's patrons on top of the Voyager Web Services enabling you to implement a single interface that efficiently handles both the discovery and fulfillment actions.

The Web Services may be used to implement the following DLF-DI version 1.1 functions:

- Get Patron Information
- Renew Loan
- Cancel Request
- Get Patron Status
- Get Services
- Request Title
- Request Item

VPDS and VXWS IP address/port options have been provide in support of these services. See [Table 8-2](#).

Documentation for all Voyager Web Services is published on EL Commons at <http://www.exlibrisgroup.org>. For more information about the DLF ILS-DI, go to <http://www.diglib.org/architectures/ilsdi/>.



Procedure 8-3. Configuring the Definitions Tab

Use the following to configure the **Definitions** tab.

1. From the **Search - Database Definitions** screen, select the **Definitions** tab.

Result: The **Definitions** tab displays with the fields that represent the protocol and type selected on the **Database** tab.

See:

- Figure 8-13 on page 22 for Voyager Bibliographic
 - Figure 8-14 on page 22 for Voyager Citation
 - Figure 8-15 on page 23 for Z39.50 Bibliographic
 - Z39.50 Citation is the same as Figure 8-15 on page 23, *plus* the Hook to Holdings drop-down
2. Enter the target library's OPAC server IP address in the **Addr** field of the OPAC section.

The IP **Addr** field may be edited for the LOCAL (see [Figure 8-16](#)) database code provided.

Search - Database Definitions	
Codes	Types
LOCAL	Voyager
LOCZ	Z39.50
MEDL	Z39.50

Figure 8-16. LOCAL code example

3. Enter the target library's OPAC server port in the **Port** field of the OPAC section.

The **Port** field may be edited for the LOCAL (see [Figure 8-16](#)) database code provided.

NOTE:

Additional **Address** and **Port** fields have been added to the **Definitions** tab in order to facilitate Universal Borrowing. If you do not participate in Universal Borrowing, you only need to add **Address** and **Port** information in the **Opac** block. You do not need to add **Address** and **Port** information in the **System Administration**, **Circ**, **Callslip**, or **VPDS** sections. For those customers participating in Universal Borrowing, see the *Voyager Universal Borrowing User's Guide* or *Voyager Primo Integration User's Guide* (where Primo is the discovery interface) for more information.

4. For databases defined as Z39.50 connections, the target server may require a Database Name, User ID, and Password to gain access to it.

The **Database Name** is the name of the server to which you are trying to connect. You may need to contact the vendor for the database name information.

If appropriate, enter a user ID and password in the **User ID** and **Password** fields.

5. Enter a database weight in the **Weight** field.
6. Enter the maximum number of titles to be retrieved during a search (1-5000) in the **Maximum Hits** field.

7. If this is a Citation database, the **Hook to Holdings** drop-down menu is where you connect the hook to holdings profile name to the citation database. If you want to display holdings for citation records, this Hook to Holdings option determines how this citation record gets linked to the local bibliographic record.

NOTE:

This drop-down box is only active if the database is a Citation database.

To...	Do This...
prevent or monitor excess connections on a general basis	1. Enter the maximum number of connections that your institution is licensed to offer in the Maximum number of connections field. NOTE: • Depending on what you select as your license violation action, any connection exceeding the number entered here will either be blocked or recorded in a log file. For example, if you enter ten as your maximum number of connections, and choose block as your license violation action, any connection over this limit will be blocked. NOTE: The limit in this field will be ignored if any number higher than zero is entered in the Maximum staff connections or Maximum public connections fields.
prevent or monitor excess connections to the database on a specific staff/public basis	1. Enter the maximum number of staff connections in the Maximum staff connections field 2. Enter the maximum number of public connections in the Maximum public connections field NOTE: • These two numbers should add up to the total number of concurrent connections your institution is licensed to offer. • You should enter zero in both of these fields if there are no restrictions on the number of connections your institution can have to the database, or if you want to prevent or monitor excess connections on a general basis.

Example: If your institution is obligated to not exceed ten concurrent connections to the database, it would be useful to set the limit on public connections to five in order to assure that five staff connections will be available at all times.

8. If this database uses the Z39.50 protocol, select the encoding of the incoming records in the **Source Character Set** field.
9. The **License violation action** field designates the action that will be taken when the limit for connections to a remote database has been exceeded.
 - Select **Block** from the drop-down menu if you wish to prevent excess connections to the database. In this case, the person attempting to connect will receive a block message and the actual connection to the remote database will not occur.
 - Select **Log** from the drop-down menu if you wish to record each connection that exceeds the established limit for the database to a log file on the server. In this case, the actual connection to the remote database will not be prevented. The following is the path and name of the log file in which each license violation is recorded: /m1/voyager/xxxdb/Log/Log.voyager.
10. If you do not want the database to display in staff searches, select the **Staff Suppress** check box. Remove the selection to permit staff use in Cataloging.
11. Select the **Save** button to save your information. Otherwise, select the **Cancel** button to close the dialog box without saving.

Attributes Tab

The **Attributes** tab is where the Search Codes as required by WebVoyage in the connect.ini and other .ini are defined. The **Attribute** tab identifies a set of access points against which the search term is to be matched such as title or subject. The remaining information must be set according to what is dictated by the Z39.50 server being connected to. See the [Z39.50 Attribute Codes](#) Appendix for a listing of attribute codes that are available for use by Voyager when establishing connections to a target database using the Z39.50 protocol.



IMPORTANT:

The Attributes tab only displays if you have checked the Z39.50 Database check box on the Database tab.

See [Attributes Supported For Connection to Voyager Z39.50 Server](#) on [page B-12](#) for a listing of attribute codes that can be used by other sites when establishing connections to your Voyager Z39.50 server.

For specific attribute information of your target databases, see the citation or Z39.50 database vendor's documentation or target system's support staff.



Procedure 8-4. Adding an Attribute

Use the following to add or edit a database.

From the **Database Definitions** main dialog box:

If you are...	Then...
Adding a new database	click the New button
Result: The Search Database Attributes Settings dialog box displays (see Figure 8-17).	
Editing an existing profile	click the Modify button

Result: The Search Database Attributes Settings dialog box displays (see [Figure 8-17](#)).

Search Database Attributes Settings

Search Code:

Attribute Description:

Use Attribute:

Relation Attribute:

Position Attribute:

Structure Attribute:

Completeness Attribute:

☐ Left-hand truncation ☐ Right-hand truncation

☐ Boolean Enabled

Figure 8-17. Search Database Attributes Settings

12. Enter a search code definition in the **Search Code** field (only letters without spaces). You can obtain this code from the [Search Definition Tables](#) appendix in the *Voyager System Administration Manual*.
13. Enter the description for the attribute in the **Attribute Description** field.
14. Enter a number between 1-2000 in the **Use Attribute** field based on the Z39.50 attribute standards. See [Z39.50 Attribute Codes](#) for more information.
15. Select a relation attribute from the drop-down menu in the **Relation Attribute** field. Relation attributes describe the relationship of the access point (left side of the relation) to the search term as qualified by the attributes (right side of the relation). For example, Date-publication <= 1975.
16. Select a position attribute from the drop-down menu in the **Position Attribute** field. The Position attribute determines the placement of the term in the field.
17. Select a structure for the attribute from the drop-down menu in the **Structure Attribute** field. The term has a structure that is either implied by the Use attribute or defined by the target.

18. Select the completeness for the attribute from the drop-down menu in the **Completeness Attribute** field. The completeness attribute specifies that the contents of the search term represent a complete or incomplete subfield or a complete field.
 19. Select the **Right-hand truncation** check box if you want your searches to right truncate. The last word of the term is right truncated.
 20. Select the **Left-hand truncation** check box if you want your searches to left truncate. The first word of the term is left truncated.
 21. Select the **Boolean enabled** check box if you want to be able to use Boolean operators in your search.
 22. The **Save** button saves your information. The **Cancel** button closes the dialog box without saving.
-

Access Control Tab

Access groups provide a way for your institution to control access to non-public databases through the **Voyager Connection Options** window in WebVoyage. From the **Access Control** tab on the **Database Definitions** dialog box, you can select access groups to be associated with a non-public database (non-public databases are those which do not have the **Public Use** check box selected on the **Database** tab).

NOTE:

This tab is only active if you clear the Public Use check box on the Select Database tab.

How a particular access group controls access to a non-public database depends upon the type of the access group. Because only the names of the available access groups display on the **Access Control** tab of the **Database Definitions** dialog box and not the particular types of the access groups, you may have to look in the Access Control Groups activity to find out the type of a particular access group. See "Access Control Groups" in this User's Guide for information about creating access groups and for further explanations of how each type of access group works.

The **Access Control** tab displays only if the **Public Use** check box on the **Select Database** tab has not been checked, Figure 8-18. Checking the **Public Use** check box specifies that the database is public and available to all users. Therefore if the **Public Use** check box is checked, there is no need for Access Control.

If a database is not public, access groups must be selected for the system to know who can search the database. If a database is not public and no access groups have been assigned to it, the database never displays in WebVoyage.

NOTE:

One type of access group controls access to non-public databases by patron group. For this type of access group, the non-public databases that a particular patron is authorized to search will display only after the patron has logged in. However, you can force patrons to login before accessing the **Voyager Connections Options** window in WebVoyage. See the *Voyager WebVoyage User's Guide* for more information.

Figure 8-18. Public Use Check Box Cleared

License Restrictions

Your institution may be required to conform to license restrictions regarding connections to specific remote databases. According to license agreements with your database providers, your institution may be obligated to not exceed determined amounts of concurrent connections to particular databases (for example, no more than 20 connections to "Database xxx" at one time).

Using the **Maximum number of connections**, **Maximum staff connections**, **Maximum public connections**, and **License violation action** fields, you have the option to either set a limit on the total number of connections to a database or to set one limit for public connections and another for staff connections to a database; you also have the option to either log or block the connections that exceed the limits you set.



Procedure 8-5. Assigning Access Control Groups

Use the following to assign or reassign Access Control Groups.

1. From the Search - Database Definitions screen, Select the **Access Control** tab.

Result: Invokes the Access Control Groups dialog box (see [Figure 8-19](#)). The Available Access Groups and the Selected Access Groups display.

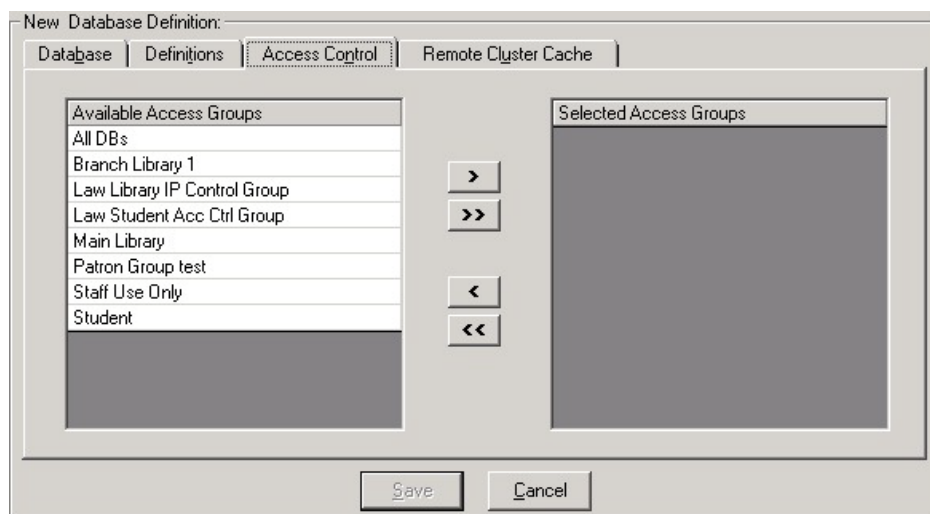


Figure 8-19. Access Control Groups Tab

2. To add an access group, highlight the group in the **Available Access Groups** list and click the > button to add it to the **Selected Access Groups** list.

Result: The selected index moves from the **Available Access Groups** list to the **Selected Access Groups** list.

You can add all of the available groups to the **Selected Access Groups** list by clicking the >> button.



IMPORTANT:

If no access groups are assigned to a database, that database never displays in WebVoyage.

To remove an index from the **Selected Indexes** list, highlight the index and click the < button. The index moves back to the **Available Indexes** list.

To remove all indexes from the **Selected Indexes** list, click the << button. All of the selected indexes move back to the **Available Indexes** list.

3. The **Save** button saves your information. The **Cancel** button closes the dialog box without saving.
-

Remote Cluster Cache

Voyager updates cluster and patron information from remote clusters when you refresh the remote cluster cache.

NOTE:

Be sure to refresh your remote cluster cache with your remote cluster libraries' schedules (as well as yours) in mind, as refreshing the cache connects to their databases and retrieves the information.



Procedure 8-6. Updating the Remote Cluster Cache

Use the following to update the remote cluster cache.

1. Select the **Database** tab from the **Search - Database Definitions** screen.
2. Select the UB box.

Result: The **Remote Cluster Cache** tab appears (see [Figure 8-20](#)).

The dialog box is titled "New Database Definition:" and has three tabs: "Database", "Definitions", and "Remote Cluster Cache". The "Remote Cluster Cache" tab is selected. It contains the following fields and options:

- Code:** A text input field.
- Name:** A text input field.
- Description:** A text input field.
- Protocol:** Two radio buttons: "Voyager Database" (selected) and "Z39.50 Database".
- Type:** Two radio buttons: "Bibliographic" (selected) and "Citation".
- Public Use:** A checked checkbox.
- UB:** A checked checkbox.
- Staff Suppress:** An unchecked checkbox.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

Figure 8-20. Remote Cluster Cache Tab

3. Select the **Remote Cluster Cache** tab.

Result: The Remote Cluster Cache dialog box appears (see [Figure 8-21](#)).

The dialog box is titled "Edit Database Definition:" and has three tabs: "Select Database", "Definitions", and "Remote Cluster Cache". The "Remote Cluster Cache" tab is selected. It contains the following elements:

- Remote Cluster Name:** A list box showing "UB Development Test Library" as the selected item.
- Buttons:** "Refresh Cache", "Save", and "Cancel" buttons at the bottom.

Figure 8-21. Remote Cluster Cache Dialog Box

4. Click the **Refresh Cache** button.

Result: Any changes to the remote clusters are reflected in the **Remote Cluster Name** box.

5. Select the **Save** button to save your information. Otherwise, select the **Cancel** button to close the dialog box without saving.
-

Heading Filters

The Search - Heading Filters component in Voyager System Administration displays the following heading type information (defined by the Library of Congress) that is stored in the Voyager heading type table:

- Subject heading and term source codes
(Refer to <http://www.loc.gov/standards/sourcelist/subject.html>)
- Genre/form codes
(Refer to <http://www.loc.gov/standards/sourcelist/genre-form.html>)
- Occupation term source codes
(Refer to <http://www.loc.gov/standards/sourcelist/occupation.html>)

The most commonly used heading types are specified in the second indicator of the 650 field of a MARC record. The following is the list of second indicators:

- 0 - Library of Congress subject headings
- 1 - Library of Congress subject headings for children's literature
- 2 - Medical subject headings
- 3 - National Agricultural Library subject authority file
- 4 - Source not specified
- 5 - Canadian subject headings
- 6 - Répertoire de vedettes-matière
- 7 - Source specified in subfield 2

Maintaining the Heading Type Table

With Voyager 8.2, the heading type table is expanded to accommodate the growth in the number of codes created by the Library of Congress. This Voyager database table is updated by Ex Libris and provided with your upgrade.



IMPORTANT:

When you upgrade to Voyager 8.2, the change to the heading type table requires a browse index regen at the time of upgrade.



IMPORTANT:

When Ex Libris adds a new index to the heading type table in a release subsequent to your Voyager 8.2 upgrade, there may be records added to your database between releases that are not using the new index. To index these records, you can resave individual records in cataloging (which changes the update date) or use the Voyager Global Data Change Submit Index Records Job in Job Management (refer to the Global Data Change User's Guide) to process a group of records.

The updates to the heading type table (per the Library of Congress) are visible in Voyager in several ways:

- Voyager System Administration Heading Filters configuration
- Search results display in WebVoyage (see [Figure 8-22](#))
- Heading Types Filter list on the Search Index Selection tab (see [Figure 8-23](#))

Alkazzi, Basil, 1938—Catalogs.**Titles:** 1**Type:** Library of Congress subject headings**America—Bibliography—Catalogs****Titles:** 1**Type:** Library of Congress subject headings**American literature—Bibliography—Catalogs.****Titles:** 1**Type:** Library of Congress subject headings**American literature—Virginia—Bibliography—Catalogs.****Titles:** 1**Type:** Library of Congress subject headings

Figure 8-22. Heading Types Search Results in WebVoyage

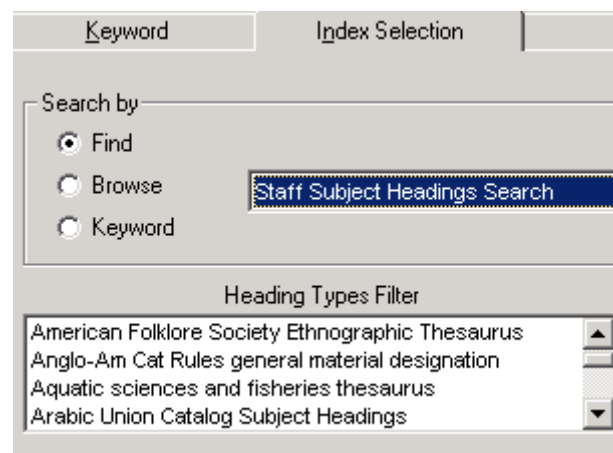


Figure 8-23. Heading Types Filter (Index Selection tab)

Editing Heading Filters

The **Heading Filters** dialog box allows you to suppress or display the index filters that can be used for Heading Searches made in the staff modules.

NOTE:

Heading Filters can be edited but not deleted, and new ones can't be added. See [Figure 8-24](#).



Figure 8-24. Heading Filters



Procedure 8-7. Suppressing or Enabling Heading Filters

Use the following to suppress or enable Heading Filters.

1. From the Search menu bar, Select the **Heading Filters** button.

Result: Invokes the Heading Filters list box (see [Figure 8-24](#)).

2. Select the desired Index and Heading Type combination.
3. Click the **Edit** button

Result: The Edit Heading Filter dialog box opens (see [Figure 8-25](#)).

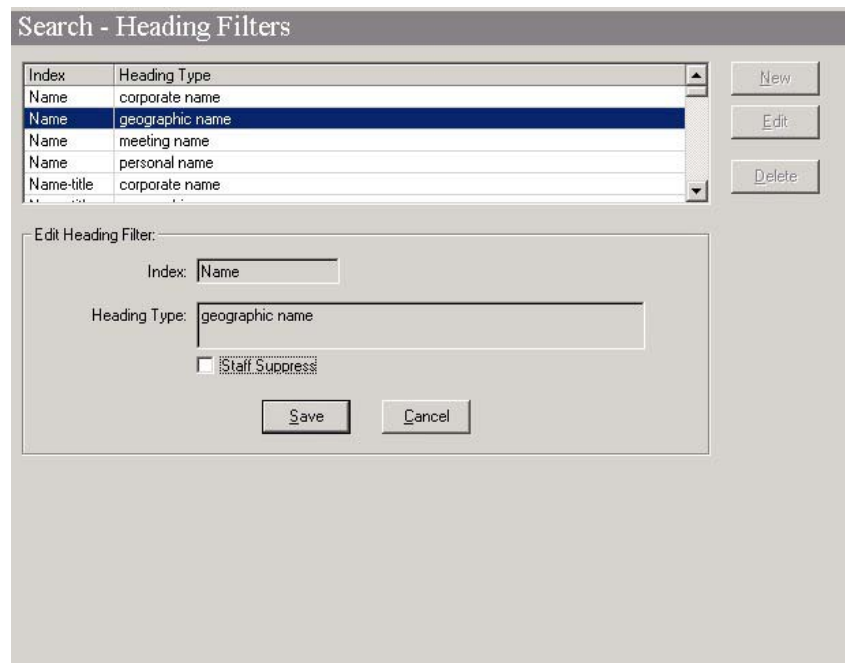


Figure 8-25. Heading Filters Dialog Box

4. Click the **Staff Suppress** check box if you want to suppress the filter from being available when Heading searches are made from the staff modules.

[Figure 8-26](#) on [page 8-44](#) shows a filter displayed in the Voyager Cataloging module.

[Figure 8-27](#) on [page 8-44](#) shows the results of the same filter set to Staff suppress.

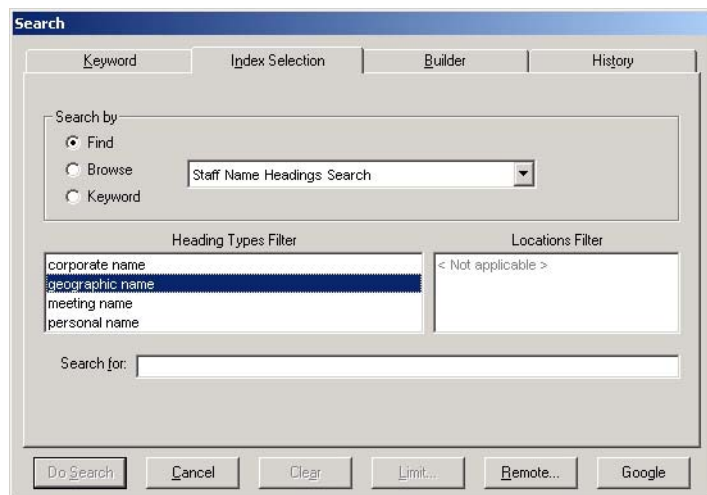


Figure 8-26. Heading Filter Displayed

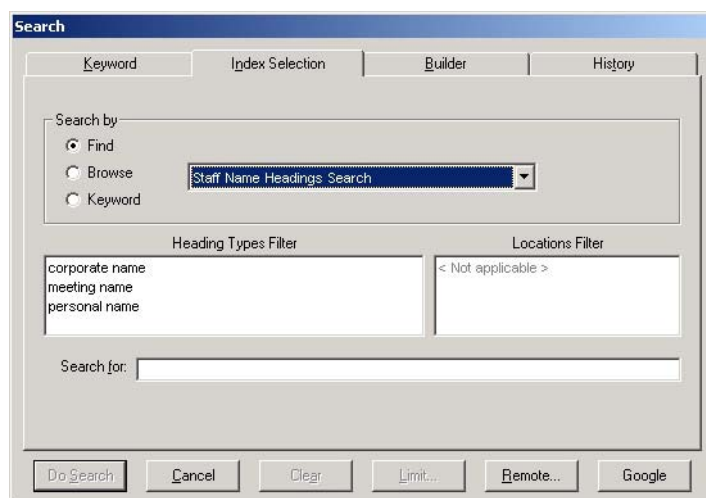


Figure 8-27. Heading Filter Suppressed (in Same Filter List)

5. The **Save** button saves your information. The **Cancel** button closes the dialog box without saving.

Hook To Holdings

Hook to Holdings allows you, when searching a citation database, to display the call number in your own holdings for material that matches the citations you are currently searching for.

The Hook to Holdings feature is used only in conjunction with Citation Server. See *Voyager Citation Server User's Guide* for more information.

NOTE:

The configuration of a Hook to Holdings profile is similar to the Import/Replace profile. You can specify the details for the Import/Replace profile on the **Select Profile** tab ([Figure 8-29](#) on [page 8-47](#)), and define the fields to be searched on the **Field Definitions** tab ([Figure 1](#) on [page 8-49](#)).

The **Selected Fields** list determines the fields that Voyager will search in trying to match the citation with any database holdings. Voyager will search fields in the order that the fields appear in the list.



Procedure 8-8. Adding a Hook to Holdings Profile

Use the following to add a Hook to Holdings profile to the System Administration module.

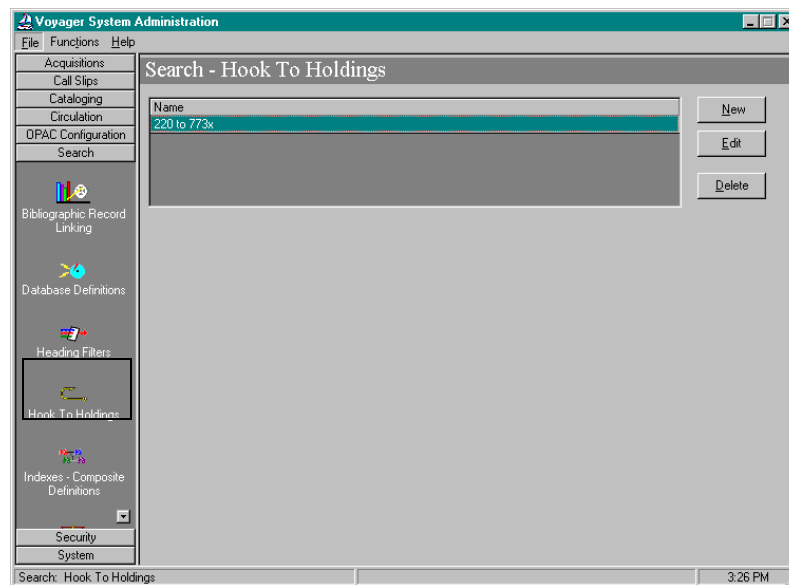


Figure 8-28. System Administration Main Menu

1. Start the **System Administration** module (see [Figure 8-28](#)).
2. Click the **Search** button in the menu sidebar.

Result: The Search menu expands

3. Click the **Hook to Holdings** button (see [Figure 8-28](#)).

Result: This opens the Hook to Holdings main menu (see [Figure 8-28](#)).

4. Click the **New** button.

Result: This enables the Profile Name and Profile Code fields on the Select Profile tab, as well as the Field Definitions tab of the Hook to Holdings main screen (see [Figure 8-29](#)).

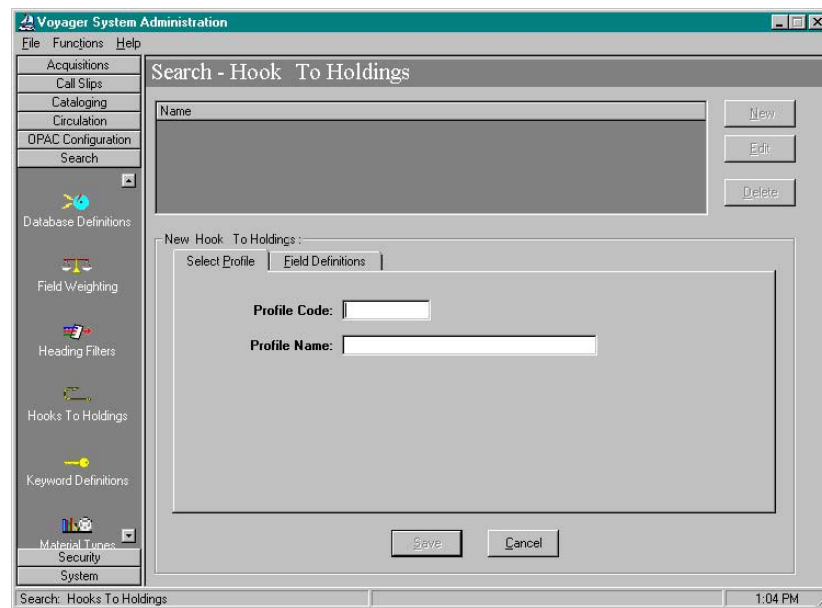


Figure 8-29. Select Profile and Field Definitions Tabs

5. **Profile Code** field: Enter an abbreviated name in the **Profile Code** Field (eight characters maximum).
6. **Profile Name** field: Enter a profile name in the **Profile Name** field. Use something short and descriptive of the profile being created (25 characters maximum).

NOTE:

This is the name that appears in the Hook to Holdings drop-down box in Database Definitions.

7. Select the **Field Definitions** tab on the **Hook to Holdings** main screen (see [Figure 8-29](#)).

Result: This invokes the **Field Definitions** dialog box on the **Hook to Holdings** main screen (see [Figure 8-30](#)).

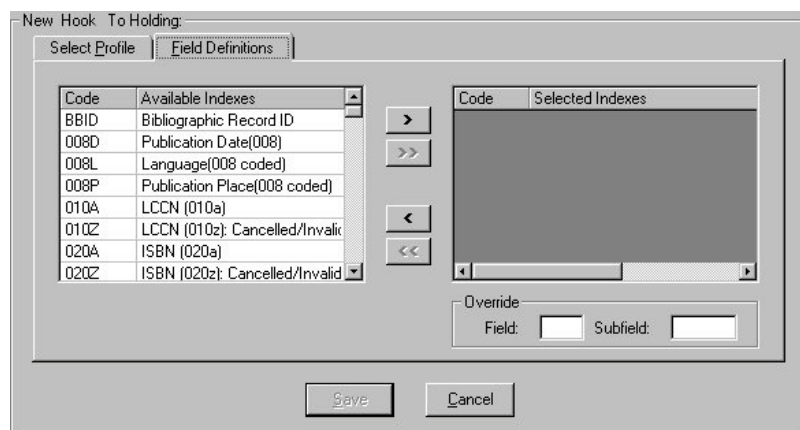


Figure 8-30. Field Definitions Dialog Box

8. Locate the field(s) containing the match points(s) (usually the ISSN number) in the local records (usually the 022a in MARC21 format) and in the citation records (often the ISSN in citation records is in the 773x field). You can select any number of match points from the list, using the following procedure for each, until all desired match points are in the **Selected Indexes** list.

If...

Then...

The match point MARC fields are the same fields in both the records in the local catalog and the citation record

- a. Highlight the MARC field (and subfield if applicable) of the match point in the **Available Indexes** list.
- b. Click the **>** Button.
- c. To save changes and return to the Hook to Holdings Main screen, click the **Save** button.

The match points (ISSNs) of the local records and the citation records are *not* the same

- a. Highlight the MARC field/subfield of the ISSN of the local catalog in the **Available Indexes** list.
- b. Click the **>** button.

When you select the index in the Selected Indexes list box, the Field Override and Subfield Override fields will become active.

- c. To save changes and return to the Hook to Holdings Main screen, click the **Save** button.

Result:

Your Hook to Holdings profile is now saved in Voyager System Administration.

Sample Hook to Holdings Profile

Example: The following is an example of how to create a Hook to Holdings profile which matches the (ISSN in the) 022a of the local records to the (ISSN in the) 773x in the citation records.

1. From the **Field Definitions** dialog box in the **Hook to Holdings** main screen, highlight the **022A ISSN (022A)** index in the **Available Indexes** list box of the **Field Definitions** tab (see [Figure 8-31](#)).

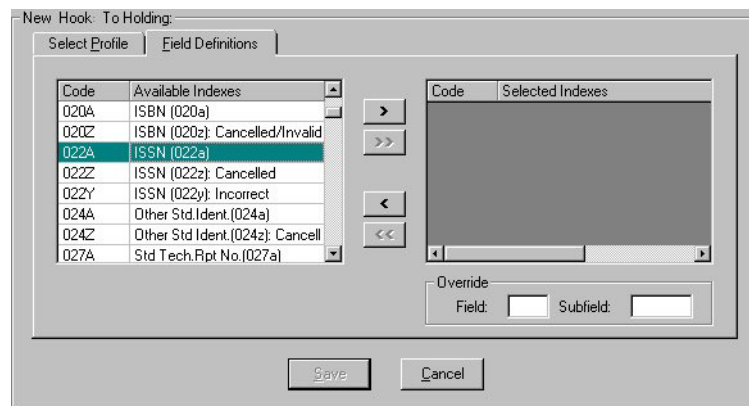


Figure 8-31. 022A ISSN (022a) in the Available Indexes List Box

2. Click the > button.

Result: The **022A ISSN (022A)** index transfers to the **Selected indexes** list box. This also enables the **Field Override** and **Subfield Override** fields (see [Figure 8-32](#)).

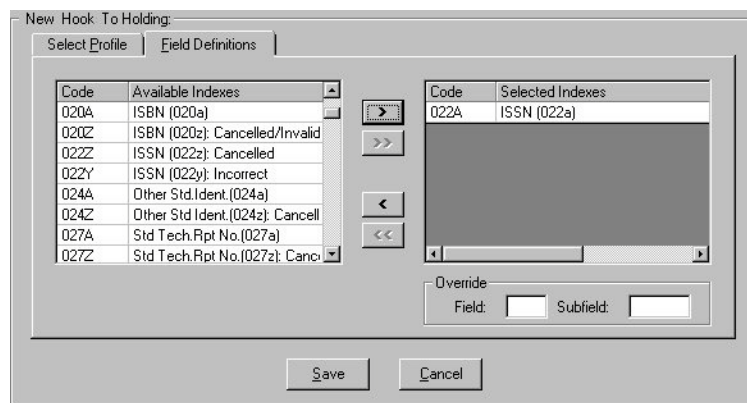


Figure 8-32. 022A ISSN Index in the Selected Indexes List Box

Result: Hook to Holdings matches the 022a fields of the records on the local database to the 022a fields of the citation records.

Next, configure Hook to Holdings to match the 022a in the records on the local database to the 773x field in the records on the citation database(s), by establishing a field and subfield override:

3. In the **Field Override** field, enter **773**.
4. In the **Subfield Override** field, enter **x**.

The **Field Definitions** dialog box in the **Hook to Holdings** main screen should now look like [Figure 8-33](#) on [page 8-51](#).

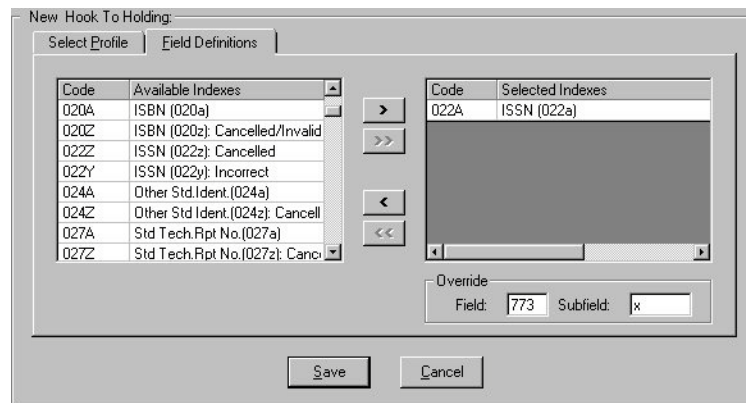


Figure 8-33. 022A ISSN with 773x Override

5. Click the **Save** button.

Result: Hook to Holdings now retrieves holdings information from your local holdings based on the ISSN match between the 022a fields in the records in your local database to the 773x fields in your citation records.



Procedure 8-9. Deleting a Profile

Use the following to delete a profile.

1. Select the profile to be deleted and click the **Delete** button. In the confirmation dialog box, click **Yes** to delete the profile or **No** to keep the profile.

Indexes - Composite Definitions

You can define composite searches by selecting **Search** on the System Administration side menu, then clicking the **Indexes - Composite Definitions** button (see [Figure 8-34](#)).

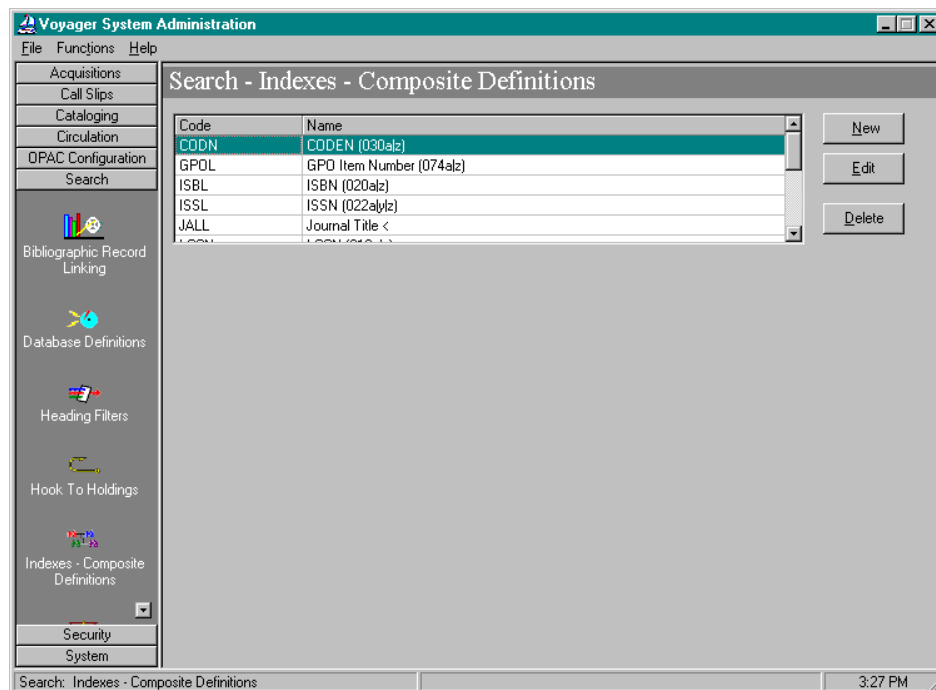


Figure 8-34. Composite Definitions

Voyager comes with preset options so that once your database load and index generation are completed, you can begin searching immediately through a wide array of search types. However, you can change many of these preset options. In some cases, you cannot change Search Codes or delete certain search types. All the indexes and search types are described in the [“Search Definition Tables”](#) appendix of this User's Guide.

The TALL and JALL Composite Searches cannot be deleted. However, they can be edited.

You may have a maximum of 55 Composite Searches.

The Indexes - Composite Definitions dialog boxes contain four tabs and corresponding dialog boxes:

- Index
- Definitions
- Sort Order
- Search Results

Index Tab

The Index tab contains the general information for the search, including the code, name, Z39.50 use attribute, and an option to suppress the search from the Voyager staff modules.

Code

When the system displays search results from a composite search in all Voyager modules, it includes at the top of the screen the Composite Code and the search statement you entered. The Composite Code is system-assigned. It cannot be changed or edited.

Name

Composite Names display on the staff search grid. The system continually counts the number of times any one Composite Name is used and readjusts the list accordingly, using frequency of use to determine the list order. Each time an operator opens a module to conduct a bibliographic search, the list order may have changed since the last time the operator used the system.

If a group of Composite Names appears in A-Z order, that is an indication that those Composite Names have not been used. To edit a search name, choose up to 40 characters (alphanumeric, punctuation, and spaces). Uppercase and lowercase are allowed for alpha characters.

Z39.50 Use Attribute

The Z39.50 Use Attribute is the access point which the search is performed on, when remote clients connect to the Voyager Server. See [Standard Z39.50 Bibliographic Use Attributes](#) on [page B-2](#) in the [Z39.50 Attribute Codes](#) appendix to this document for available Use Attribute values.

Example:

To configure an ISBN composite code definition for searching the ISBN of records in the remote database, enter the **7** Use Attribute which uses the ISBN as the access point. Searches using this code, will then search according to ISBN.

Staff Suppress Check Box

Select this check box to suppress the code from view in the Voyager staff modules (Cataloging, for example).

Definitions Tab

Determine the component searches to make up each composite search on the Definitions tab.

The Components are the single-field indexes also shown under the single-field Search Definitions except that the MFHD call numbers, Location, Format, Medium, Date, and Language do not display as Components since they cannot be included in a Composite Search. Headings and keyword searches cannot be included in a Composite Search and do not display as Components [Figure 8-38](#) on [page 8-58](#).

Any single-field index may be added to a Composite Search. The system does not monitor what single-field indexes are logically related. We suggest creating Composite Searches using only related single-field indexes such as all standard numbers, all series, all names, and so on.

Sort Order Tab

The **Sort Order** tab allows you to select the order in which you want the Titles List to sort when displayed.

The screenshot shows a dialog box titled "Edit Indexes - Composite Definition:". It has four tabs: "Index", "Definitions", "Sort Order" (which is selected and highlighted with a dashed border), and "Search Results". Inside the "Sort Order" tab, there are three labels with corresponding dropdown menus: "Primary Sort:" with "Author" selected, "Second Sort:" with "Title" selected, and "Tertiary Sort:" with "none" selected. At the bottom of the dialog box are two buttons: "Save" and "Cancel".

Figure 8-35. Sort Order Tab

The following fields define the sort characteristics:

- The **Primary** field determines the order of search results if there are duplicate entries for the index searched (duplicate titles in a left-anchored title search, for example).
- The **Secondary** field determines how records with duplicate Primary field information sort.
- The **Tertiary** field determines how records with duplicate Primary and Secondary information sort.

You can choose one of the following search types from each drop-down menu:

- None
- Author
- Title
- Date Published (ascending)
- Date Published (descending)

NOTE:

In the case of non-keyword, including composite searches, results are first sorted by the index specific criteria (by title, in a left-anchored title search, for example), and then by the primary, secondary, and tertiary sort order criteria if there are matches. In other words, non-keyword searches treat the primary, secondary, and tertiary criteria you specify as secondary, tertiary, and quaternary.

Specifying a Sort Order for Keyword searches only applies if the search is not done under relevance.

Search Results Tab

Selections on the Search Results tab (of the **Composite Search Definitions** dialog box) determine what displays on any index display as the result of a search. If the search is a headings search, the search results are those for the subsequent index display after selecting from the headings list.

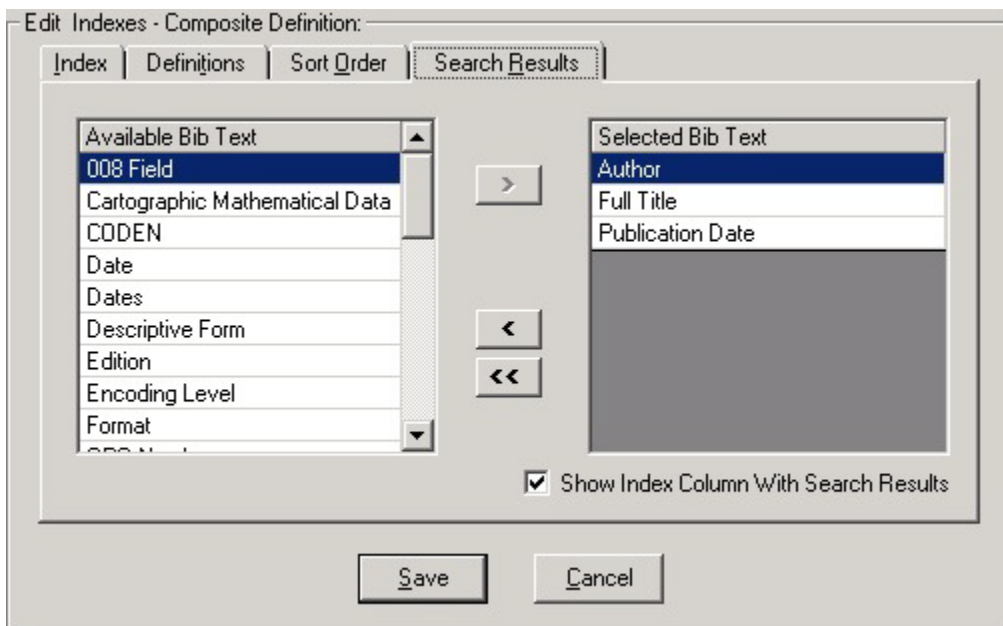


Figure 8-36. Search Results Tab

Only three elements can be assigned for any one Search Name.



Procedure 8-10. Adding/Editing a Composite Search Definition

Use the following to add or edit a Composite Search Definition.

1. From the Search menu bar, Select the **Indexes - Composite Definitions** button.

Result: Invokes the **Search - Indexes - Composite Definitions** list box (see [Figure 8-34](#)).

If you are...	Then...
Adding a new definition	click the New button

Result: The New Indexes - Composite Definition dialog box displays (see [Figure 8-37](#)).

Editing an existing definition click the **Edit** button

Result: The Edit Indexes - Composite Definition dialog box displays.

At any time:

- The **Save** button saves your information.
- The **Cancel** button closes the dialog box without saving.

Code	Name
CODN	CODEN (030a
GPOL	GPO Item Number (074a
ISBL	ISBN (020a
ISSL	ISSN (022a)lyz
JALL	Journal Title <

New Indexes - Composite Definition:

Index Definitions Sort Order Search Results

Code:

Name:

Z39.50 Use Attribute:

☐ Staff Suppress

Save Cancel

Figure 8-37. New Indexes - Composite Definition Dialog Box

2. Click the **Index** tab.

Result: The **Index** dialog box displays (see [Figure 8-37](#)).

3. On the Index tab:
 - a. Enter a code for the index definition in the **Code** field (40 characters alphanumeric, maximum).

- b. Select the appropriate Z39.50 Use attribute for the database.
- c. Select the **Staff Suppress** check box if you do not want a composite search available on the **Index Selection** tab in the staff modules.

Clear the **Staff Suppress** check box to display the composite search definition on the **Index Selection** tab.

4. Click the **Definitions** tab.

Result: The **Definitions** dialog box displays (see [Figure 8-37](#)).

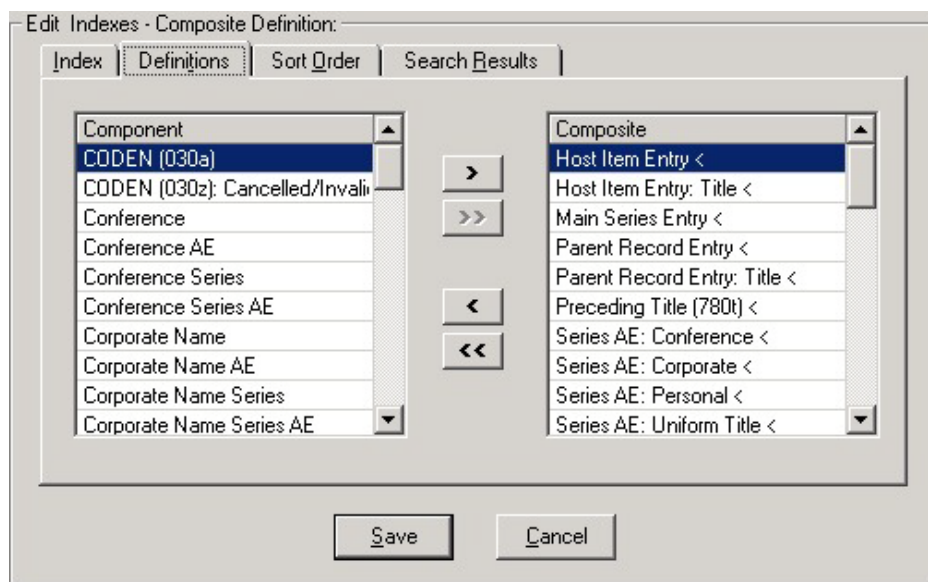


Figure 8-38. Definitions Tab

5. On the Definitions tab:
 - a. Highlight the desired search(es) in the **Component** list. Use Shift+click or Ctrl+click to select multiple rows.
 - b. Click the > button to move index definitions to the **Composite** column. To remove an index definition from the **Composite** column, highlight the element to remove and click the < button. To remove all index definitions from the **Composite** column, click the << button. All of the selected indexes move back to the **Component** column.

The list of indexes from which you can select in the **Component** column includes the following RDA (Resource Description and Access) cataloging standard options:

- Content (336)
 - Content Type Term (336 \$a)
 - Content Type Code (336 \$b)
- Media (337)
 - Media Type Term (337 \$a)
 - Media Type Code (337 \$b)
- Carrier (338)
 - Carrier Type Term (338 \$a)
 - Carrier Type Code (338 \$b)

**IMPORTANT:**

At least, two index definitions must be assigned to the Composite column for the definition to be saved.

6. Select the **Sort Order** tab and select your Primary Sort, Secondary Sort, and Tertiary Sort preferences.

The screenshot shows a dialog box titled "Edit Indexes - Composite Definition:". It has four tabs: "Index", "Definitions", "Sort Order" (which is selected), and "Search Results". Inside the "Sort Order" tab, there are three dropdown menus labeled "Primary Sort:", "Second Sort:", and "Tertiary Sort:". The "Primary Sort:" dropdown is set to "Author", the "Second Sort:" dropdown is set to "Title", and the "Tertiary Sort:" dropdown is set to "none". At the bottom of the dialog box, there are two buttons: "Save" and "Cancel".

Figure 8-39. Sort Order Tab

7. Select the Search Results tab.

Result: The Search Results dialog box opens (see [Figure 8-40](#)).

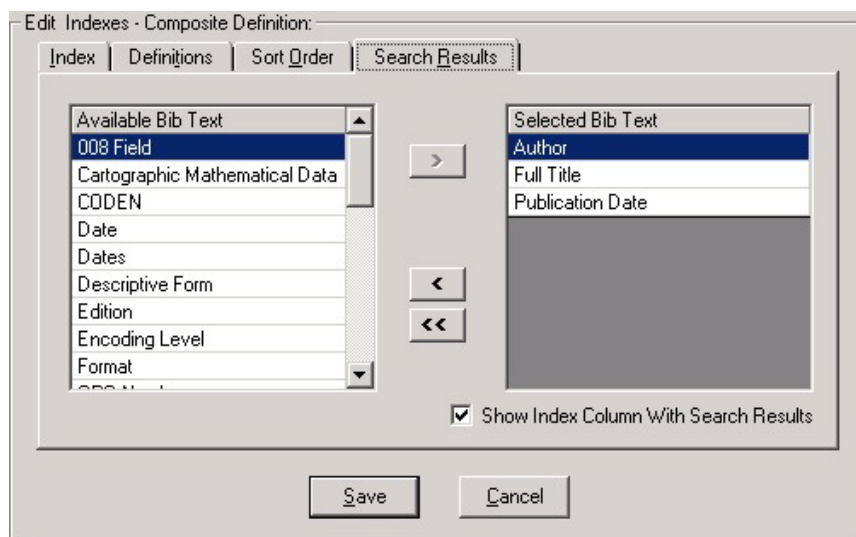


Figure 8-40. Search Results Tab

8. On the Search Results tab:
 - a. Highlight the desired bibliographic text component in the **Available Bib Text** list.
 - b. Click the > button to move components to the **Selected Bib Text** column. To remove an element from the **Selected Bib Text** column, highlight the element to remove and click the < button. To remove all the Selected Bib Text elements **Selected Bib Text** column, click the << button. All of the selected elements move back to the **Available Bib Text** column.

The bibliographic text that you identify in the **Available Bib Text** column will display in WebVoyage and the Voyager staff modules in the order in which you have selected them from left to right.

If you are using RDA formats in your Composite Definition, identify the RDA formats to add to the title statement by selecting **Add RDA formats to the title statement** and selecting one or more of the following options and identifying whether you want the code or text to display in your search results by selecting \$b or \$a:

- Show Content
- Show Carrier
- Show Media

Figure 8-41. RDA Formats to Add to the Title Statement



IMPORTANT:

At least, one Bib Text element be assigned to the Selected Bib Text column for the Composite Definition to be saved.

- c. To display the index column along with a column heading (the *Name* from the Index tab), select the **Show Index Column with Search Results** check box. This information displays in WebVoyage as well as in the Voyager staff modules. This displays the column of information from the index searched, along with a heading containing the name of the search, as entered into the Code field on the Index tab. To hide the index column and heading, clear the **Show Index Column with Search Results** check box. Only the fields specified in the Selected Bib Text column appear in the results.
9. Click the **Save** button to save your information or click the **Cancel** button to close the dialog box without saving.

Indexes - Field Weighting

Voyager comes with preset options so that once your database load and index generation are completed, you can begin searching immediately through a wide array of search types. However, you can change many of these preset options. In some cases, you cannot change Search Codes or delete certain search types. See the “[Search Definition Tables](#)” appendix to this User’s Guide for a description of all the indexes and search types.

You do not have to define any Keyword Field Weighting. When Voyager is distributed, all fields are weighted at a value of 100.

Voyager determines keyword relevance by the occurrence of the term(s) in the designated MARC fields. If you search for a single keyword, each record's relevance is the field weight of the highest weighted field that contains that keyword.

For multiple keyword searches:

- Keywords that appear more frequently in the database are considered *less* relevant.
- Keywords that appear closer together in the record are considered *more* relevant.

[Figure 8-42](#) shows the Search - Indexes- Field Weighting main screen and [Figure 8-43](#) shows the Edit Dialog box of the same screen.

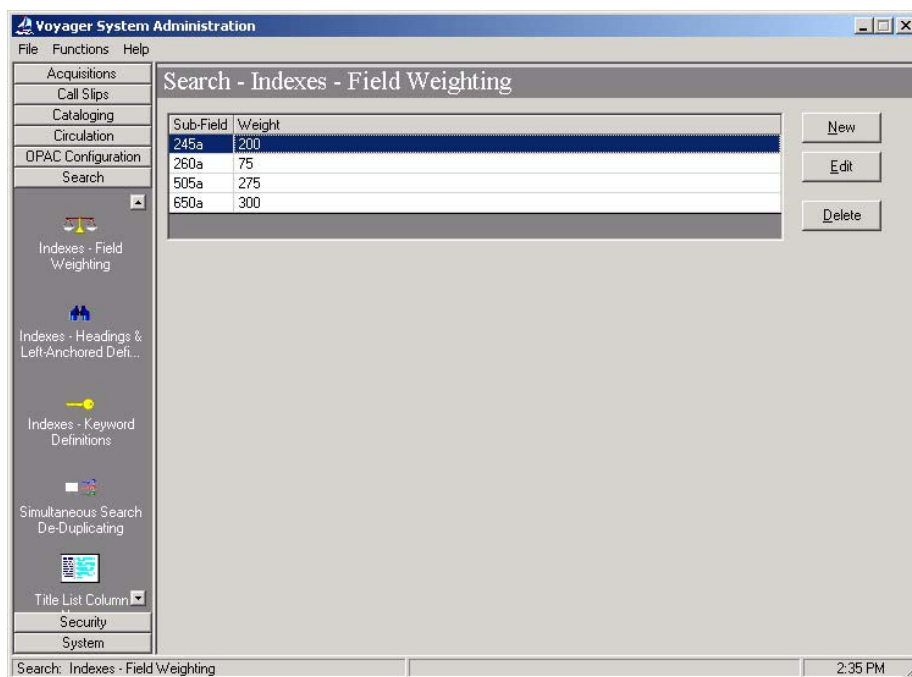


Figure 8-42. Indexes - Field Weighting Dialog Box

Sub-Field	Weight
245a	200
260a	75
505a	275
650a	300

Edit Indexes - Field Weighting:

Field and Subfield: 650a

Weight: 200 (0 - 500)

Save Cancel

Figure 8-43. Edit Indexes - Field Weighting Dialog Box

Field and Sub-Field

Type the three numbers representing the field, followed by the letter representing the subfield that you want to weight. Use the MARC 21 Format for Bibliographic Data to identify valid fields/subfields that could appear in your bibliographic records.

Weight

You can customize the relative importance of fields searched while performing relevance ranked searches. Enter the numeric value from 20 to 500 in increments of 20 that you want the relevance search engine to use when it searches this field and subfield. The higher the number, the more weight and therefore the more relevance the search engine gives to that field and subfield.

Indexes - Headings & Left-Anchored Definitions

You can customize single headings and left-anchored searches by selecting **Search** from the System Administration taskbar menu and clicking the **Headings & Left-Anchored Definitions** button.

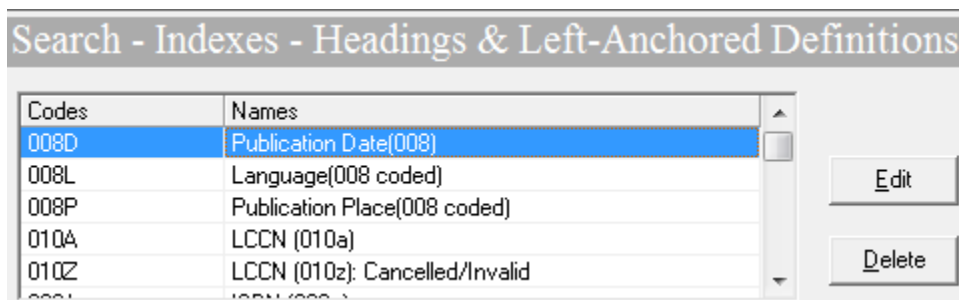


Figure 8-44. Heading and Left-Anchored Index Definitions

Voyager comes with preset options so that once your database load and index generation are completed, you can begin searching immediately through a wide array of search types.

However, you can change many of these preset options. In some cases, you cannot change Search Codes or delete certain search types.

You cannot add a Headings or Left-Anchored Search Definition.



CAUTION:

Consider carefully whether you want to delete any of your search definitions. If you delete a search definition, you cannot add it back.

The **Indexes - Headings & Left-Anchored Definitions** dialog box contains the following tabs and corresponding dialog boxes:

- Index
- Search Results
- Sort Order
- Definitions

Index Tab

The Index tab contains the general information for the search, including the code, name, Z39.50 use attribute, and an option to suppress the search from the Voyager staff modules.

Code

When the system displays search results from a headings or left-anchored search in all Voyager modules, and WebVoyage, it includes at the top of the screen the Composite Code and the search statement you entered. The Code is system-assigned. It cannot be changed or edited.

Name

Index names display on the staff search grid. The system continually counts the number of times any one index name is used and readjusts the list accordingly, using frequency of use to determine the list order. Each time an operator opens a module to conduct a bibliographic search, the list order may have changed since the last time the operator used the system.

If a group of names appears in A-Z order in the staff search grid, that is an indication that those index names have not been used. To edit a search name, choose up to 40 characters (alphanumeric, punctuation, and spaces). Uppercase and lowercase are allowed for alpha characters.

Z39.50 Use Attribute

The Z39.50 Use Attribute is the access point which the search is performed on. See [Standard Z39.50 Bibliographic Use Attributes](#) in the [Z39.50 Attribute Codes](#) appendix to this document for available Use Attribute values.

Staff Suppress Check Box

Select this check box to suppress the code from view in the Voyager staff modules (Cataloging, for example).

Search Results Tab

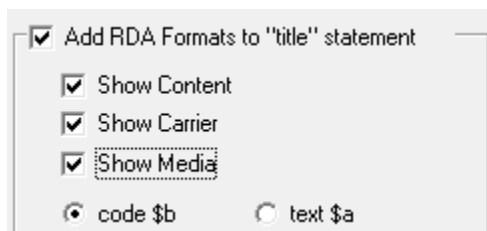
Selections on the Search Results tab determine what appears on any index display as the result of a search. If the search is a headings search, the search results are those for the subsequent index display after selecting from the headings list.

For the following search definitions specific to RDA, you may specify the RDA format(s) to add to the title statement:

- 336A - Content Type Term (336a)
- 336B - Content Type Code (336b)
- 337A - Media Type Term (337a)
- 337B - Media Type Code (337b)
- 338A - Carrier Type Term (338a)
- 338B - Carrier Type Code (338b)

To configure RDA formats to add to the title statement, select **Add RDA formats to the title statement** and select one or more of the following options and identifying whether you want the code or text to display in your search results by selecting \$b or \$a:

- Show Content
- Show Carrier
- Show Media

A screenshot of a configuration dialog box titled "Add RDA Formats to 'title' statement". The dialog has a light gray background and a thin border. It contains four checked checkboxes: "Add RDA Formats to 'title' statement", "Show Content", "Show Carrier", and "Show Media". Below these checkboxes are two radio buttons: "code \$b" (which is selected) and "text \$a".

☒ Add RDA Formats to "title" statement

☒ Show Content

☒ Show Carrier

☒ Show Media

☒ code \$b ☐ text \$a

Figure 8-45. RDA Formats to Add to the Title Statement

Sort Order Tab

The **Sort Order** tab allows you to select the order in which you want the Titles List to sort when displayed.

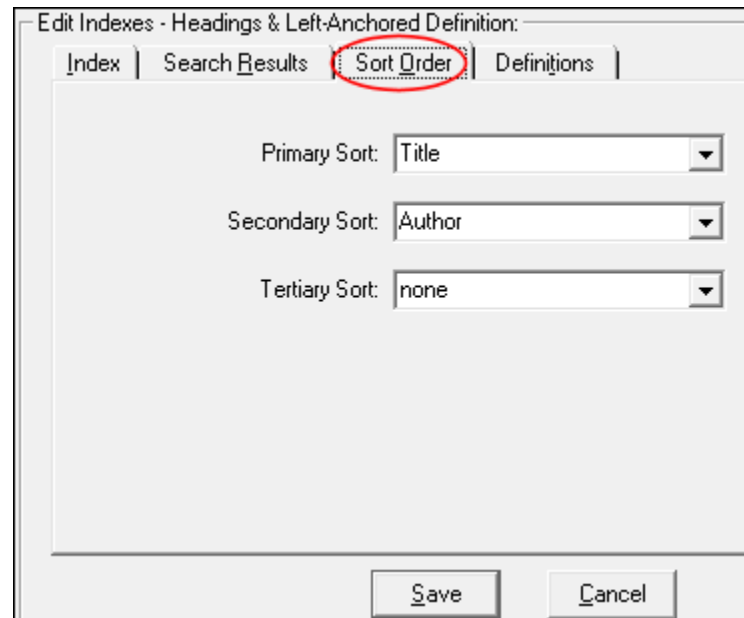


Figure 8-46. Sort Order Tab (Search - Indexes - Headings & Left Anchored Definitions)

The following fields define the sort characteristics:

- The **Primary** field determines the order of search results if there are duplicate entries for the index searched (duplicate titles in a left-anchored title search, for example).
- The **Secondary** field determines how records with duplicate Primary field information sort.
- The **Tertiary** field determines how records with duplicate Primary and Secondary information sort.

You can choose one of the following search types from each drop-down menu:

- None
- Author
- Title
- Date Published (ascending)
- Date Published (descending)

NOTE:

In the case of non-keyword, including composite searches, results are first sorted by the index specific criteria (by title, in a left-anchored title search, for example), and then by the primary, secondary, and tertiary sort order criteria if there are matches. In other words, non-keyword searches treat the primary, secondary, and tertiary criteria you specify as secondary, tertiary, and quaternary.

Specifying a Sort Order for Keyword searches only applies if the search is not done under relevance.

Definitions Tab

The Definitions tab cannot be edited for Headings and Left-Anchored Indexes.

Keyword Definitions

You can configure keyword search definitions by selecting **Search** on the System Administration taskbar menu and clicking the **Indexes - Keyword Definitions** button (see [Figure 8-47](#)).

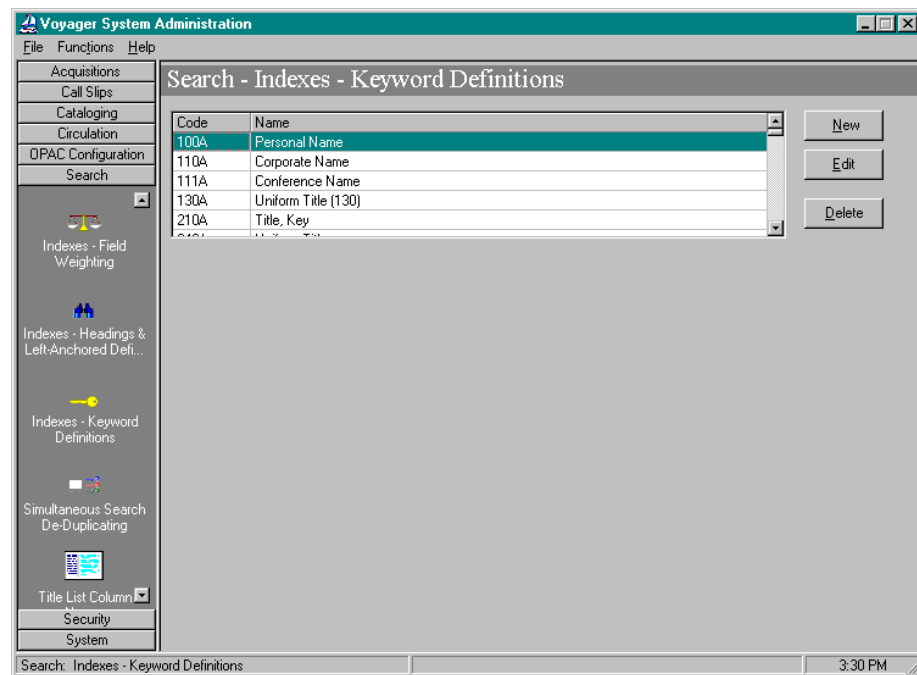


Figure 8-47. Search - Indexes - Keyword Definitions

Voyager comes with preset options so that once your database load and index generation are completed, you can begin searching immediately through a wide array of search types. However, you can change many of these preset options. In some cases, you cannot change Search Codes or delete certain search types.

NOTE:

The GKEY search cannot be deleted.

The **Indexes - Keyword Definitions** dialog box contains the following tabs:

- Index
- Definitions
- Sort Order
- Search Results

Index Tab

The Index tab contains the general information for the search, including the code, name, Z39.50 use attribute, and an option to suppress the search from the Voyager staff modules.

Code

When the system displays search results from a keyword search in all Voyager modules, it includes at the top of the screen the Keyword Code and the search statement you entered. The keyword Code is system-assigned. It cannot be changed or edited.

Name

Keyword Names display on the staff search grid. The system continually counts the number of times any one Keyword Name is used and readjusts the list accordingly, using frequency of use to determine the list order. Each time an operator opens a module to conduct a bibliographic search, the list order may have changed since the last time the operator used the system.

If a group of Keyword Names appears in A-Z order, that is an indication that those Keyword Names have not been used. To edit a search name, choose up to 40 characters (alphanumeric, punctuation, and spaces). Uppercase and lowercase are allowed for alpha characters.

Z39.50 Use Attribute

The Z39.50 Use Attribute is the access point which the search is performed on. See [Standard Z39.50 Bibliographic Use Attributes](#) in the [Z39.50 Attribute Codes](#) appendix to this document for available Use Attribute values.

OPAC suppress Check Box

Select this check box to suppress the code from view in the OPAC (like WebVoyage).

Staff suppress Check Box

Select this check box to suppress the code from view in the Voyager staff modules (Cataloging, for example).

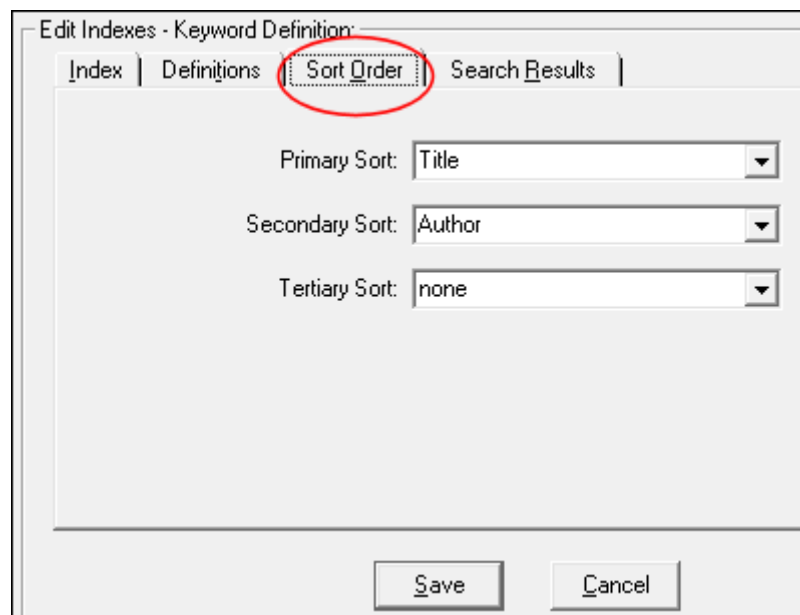
Definitions Tab

Determine the component MARC record field(s) and subfield(s) to make up each keyword search on the Definitions tab.

Any field and subfield combination may be added to a Keyword Search. The system does not monitor what fields and subfields are logically related.

Sort Order Tab

The **Sort Order** tab allows you to select the order in which you want the Titles List to sort when displayed.



The screenshot shows a window titled "Edit Indexes - Keyword Definition". It has four tabs: "Index", "Definitions", "Sort Order", and "Search Results". The "Sort Order" tab is selected and highlighted with a red circle. Below the tabs, there are three dropdown menus labeled "Primary Sort:", "Secondary Sort:", and "Tertiary Sort:". The "Primary Sort" dropdown is set to "Title", the "Secondary Sort" dropdown is set to "Author", and the "Tertiary Sort" dropdown is set to "none". At the bottom of the window are two buttons: "Save" and "Cancel".

Figure 8-48. Sort Order Tab (Search - Indexes - Keyword Definitions)

The following fields define the sort characteristics:

- The **Primary** field determines the sort order of search results when displayed.
- The **Secondary** field determines how records with duplicate Primary field information sort.
- The **Tertiary** field determines how records with duplicate Primary and Secondary information sort.

You can choose one of the following search types from each drop-down menu:

- None
- Author
- Title
- Date Published (ascending)
- Date Published (descending)

NOTE:

In the case of non-keyword, including composite searches, results are first sorted by the index specific criteria (by title, in a left-anchored title search, for example), and then by the primary, secondary, and tertiary sort order criteria if there are matches. In other words, non-keyword searches treat the primary, secondary, and tertiary criteria you specify as secondary, tertiary, and quaternary.

Specifying a Sort Order for Keyword searches only applies if the search is not done under relevance.

Search Results Tab

Selections here determine what displays on the search results display. If the search is a headings search, the search results are those for the subsequent index display after selecting from the headings list.

Only three elements can be assigned for any one Search Name.



Procedure 8-11. Adding/Editing a Keyword Search Definition

Use the following to add or edit a Keyword Search Definition.

1. From the Search menu bar, select the **Indexes - Keyword Definitions** button.

Result: The **Search - Indexes - Keyword Definitions** dialog list box opens.

If you are...	Then...
Adding a new definition	click the New button

Result: The New Indexes - Keyword Definition dialog box opens.

Editing an existing definition click the **Edit** button

Result: The Edit Indexes - Keyword Definition dialog box opens.

At any time:

- The **Save** button saves your information.
- The **Cancel** button closes the dialog box without saving.

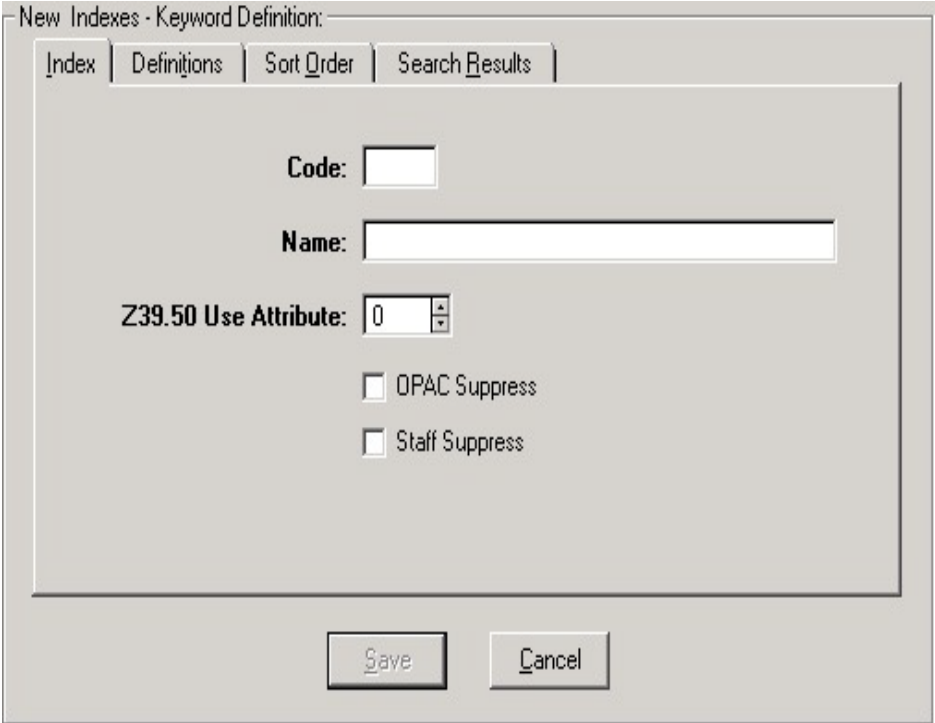
The image shows a dialog box titled "New Indexes - Keyword Definition:". It has four tabs: "Index", "Definitions", "Sort Order", and "Search Results". The "Index" tab is selected. Inside the dialog, there are several input fields: a "Code:" field with a text box, a "Name:" field with a text box, and a "Z39.50 Use Attribute:" field with a dropdown menu showing "0". Below these are two checkboxes: "OPAC Suppress" and "Staff Suppress", both of which are unchecked. At the bottom of the dialog are two buttons: "Save" and "Cancel".

Figure 8-49. New Indexes - Keyword Definition Dialog Box

2. Click the **Index** tab.

Result: The **Index** dialog box appears (see [Figure 8-49](#)).

3. On the Index tab:
 - a. Enter a code for the database in the **Code** field (40 characters maximum, alphanumeric).

- b. Select the appropriate Z39.50 Use attribute for the database.
 - c. Select the **OPAC Suppress** check box if you do not want a Keyword search available from the OPAC (including WebVoyage).
Clear the **Staff Suppress** check box to display the composite search definition in the OPAC (including WebVoyage).
 - d. Select the **Staff Suppress** check box if you do not want a Keyword search available on the **Index Selection** tab in the staff modules.
Clear the **Staff Suppress** check box to display the composite search definition on the **Index Selection** tab.
4. Click the **Definitions** tab.

Result: The **Definitions** dialog box opens.

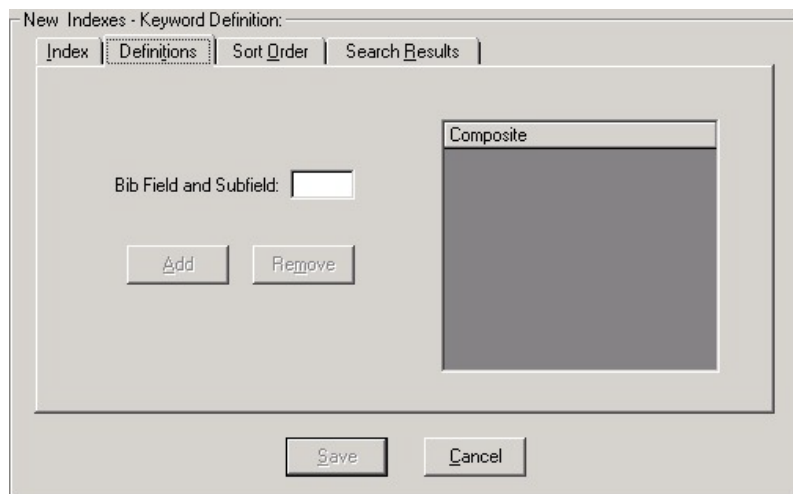


Figure 8-50. Definitions Tab

5. On the Definitions tab:
 - a. Enter the desired field and subfield in the **Bib Field and Subfield** field.
 - b. Click the **Add** button to move the field and subfield to the **Composite** column. To remove an element from the **Composite** column, highlight the element to remove and click the **Remove** button.

**IMPORTANT:**

At least, one field and subfield combination must be assigned to the Composite column for the definition to be saved.

6. Select the **Sort Order** tab.

Result: Invokes the Sort Order dialog box (see [Figure 8-51](#))

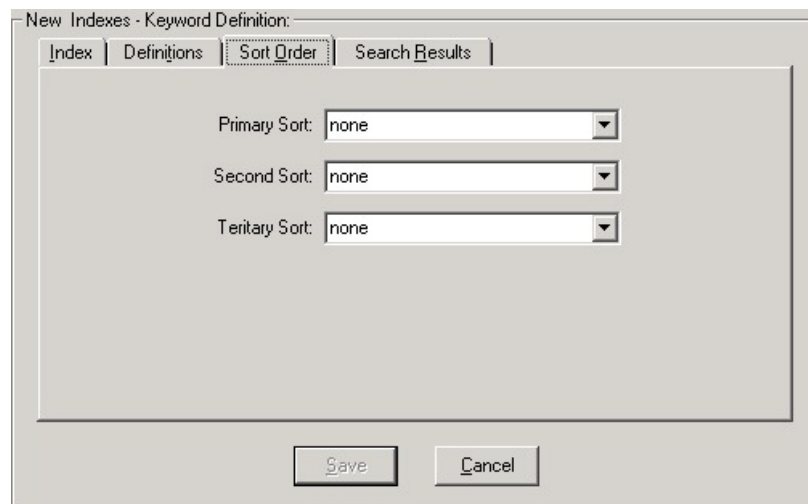


Figure 8-51. Sort Order Tab

7. On the Sort Order tab, select the Primary, Secondary, and Tertiary Sort points.
8. Select the Search Results tab.

Result: The Search Results dialog box opens.

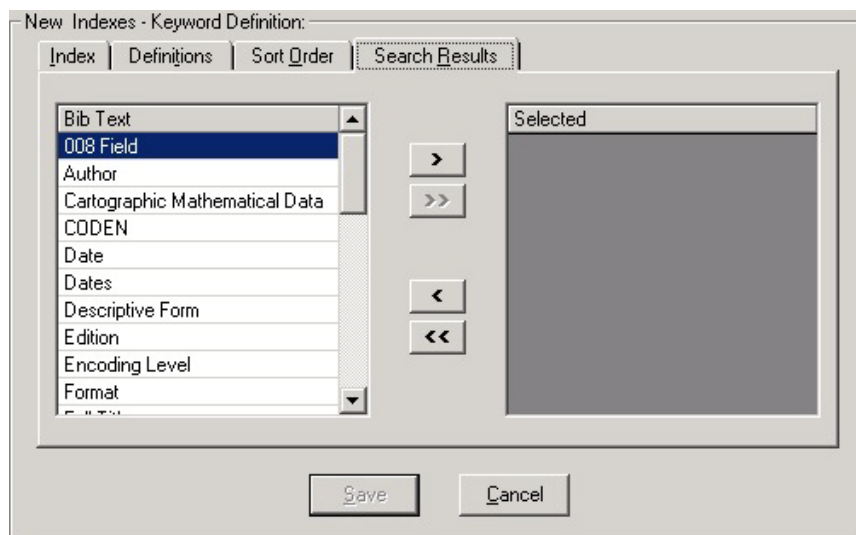


Figure 8-52. Search Results Tab

9. On the Search Results tab:
 - a. Highlight the desired bibliographic text component in the **Bib Text** list. Use Shift+click or Ctrl+click to select multiple rows.
 - b. Click the > button to move Bib Text components to the **Selected** column. To remove a component from the **Selected** column, highlight the component to remove and click the < button. The index moves back to the **Bib Text** list. To remove all components from the **Selected** list, click the << button. All of the selected components move back to the **Bib Text** list.

The bibliographic text that you identify in the **Bib Text** column will display in WebVoyage and the Voyager staff modules in the order in which you have selected them from left to right.



IMPORTANT:

At least, one component must be assigned to the Selected list for the search to be saved.

If you are using RDA formats in your keyword search definition, identify the RDA formats to add to the title statement by selecting **Add RDA formats to the title statement** and selecting one or more of the following options and identifying whether you want the code or text to display in your search results by selecting \$b or \$a:

- Show Content
- Show Carrier
- Show Media

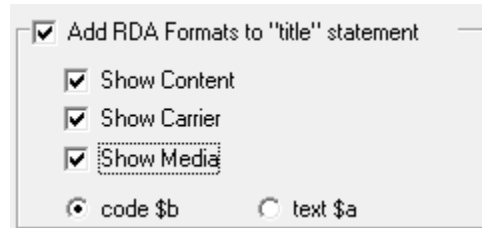


Figure 8-53. RDA Formats to Add to the Title Statement

10. Click **Save** to save your information. The **Cancel** button closes the dialog box without saving.

Holdings Keyword Definitions

Search -Indexes - Holdings Keyword Definitions allow you configure keyword searches against holdings records (respectively). For more information about the mechanics of keyword searches, see [Holdings Keyword Index Searches](#) on [page 8-6](#).

You can define composite searches by selecting Search on the System Administration side menu, then clicking the **Indexes - Holdings Keyword Definitions** button (see [Figure 8-54](#)).

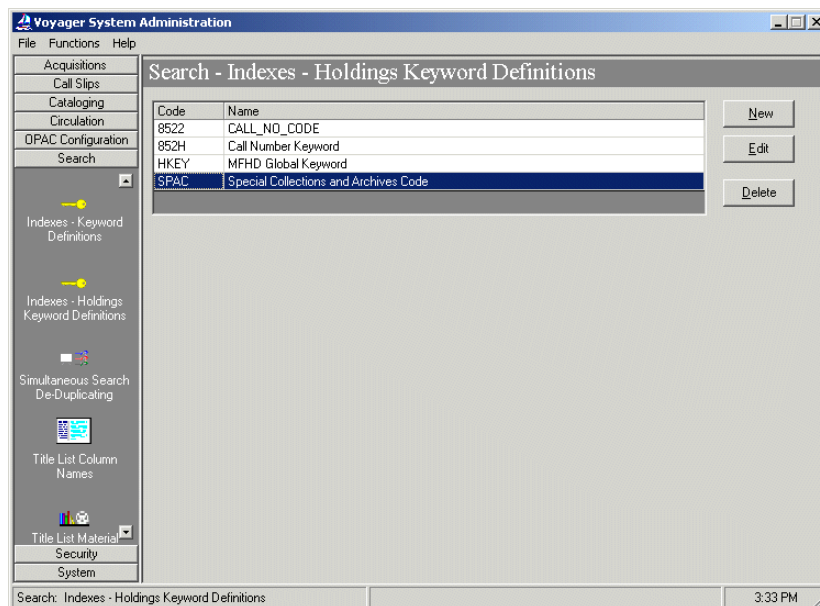


Figure 8-54. Search - Indexes - Holdings Keyword Definitions

Voyager comes with preset options so that once your database load and index generation are completed, you can begin searching immediately through a wide array of search types. However, you can change many of these preset options. In some cases you cannot change Search Codes or delete certain search types.

NOTE:

The GKEY and HKEY searches (including their definitions) cannot be deleted.

The dialog boxes for editing and creating Holdings Keyword Definitions contain the following tabs and corresponding dialog boxes ([Figure 8-55](#) on [page 8-81](#)):

- Index
- Definitions
- Sort Order
- Search Results

Index Tab

The **Index** tab contains the general information for the search, including the code, name, Z39.50 use attribute, and an option to suppress the search from the Voyager staff modules and the OPAC.

NOTE:

The **Z39.50 Use Attribute** option is not applicable, and the **OPAC Suppress** and **Staff Suppress** fields are selected automatically with Holdings Keyword indexes.

Code

When the system displays search results from a keyword search in all Voyager modules, it includes at the top of the screen the keyword code and the search statement you entered. It cannot be changed or edited. You can use the index code when performing command line searches (for example, 100A shakespeare).

Name

Keyword Names display on the staff search grid on the **Builder Search** tab. The system continually counts the number of times any one Keyword Name is used and readjusts the list accordingly, using frequency of use to determine the list order. Each time an operator opens a module to conduct a bibliographic search, the list order may have changed since the last time the operator used the system.

If a group of Keyword Names appears in A-Z order, that is an indication that those Keyword Names have not been used. To edit a search name, choose up to 40 characters (alphanumeric, punctuation, and spaces). Uppercase and lowercase characters are allowed for alphabetic characters.

Z39.5 Use Attribute

The **Z39.50 Use Attribute** is the access point on which the search is performed. See [Standard Z39.50 Bibliographic Use Attributes](#) in [Appendix B, "Z39.50 Attribute Codes"](#) for available Use Attribute values.

OPAC Suppress Check Box

Select this check box to suppress the index from view in the OPAC (**Builder Search** tab).

Staff Suppress Check Box

Select this check box to suppress the index from view in the Voyager staff modules (Cataloging, for example).

Definitions Tab

Determine the component MARC record field(s) and subfield(s) to make up each keyword search on the **Definitions** tab.

Any field and subfield combination may be added to a keyword search. The system does not validate which fields and subfields are logically related.

Sort Order Tab

Select the order in which you want the Titles List to sort when displayed.

- The **Primary** field determines the sort order of search results when displayed.
- The **Secondary** field determines how records with duplicate **Primary** field information sort.
- The **Tertiary** field determines how records with duplicate **Primary** and **Secondary** information sort.

You can choose one of the following from each drop-down menu:

- None
- Author
- Title
- Date Published (ascending)
- Date Published (descending)

Search Results Tab

Selections here determine what displays on the search results display. If the search is a headings search, the search results are those for the subsequent index display after selecting from the headings list.

Only three elements can be assigned for any one Search Name.



Procedure 8-12. Adding/Editing a Holdings Keyword Search Definition

Use the following to add or edit a Holdings Keyword Search Definition.

1. From the **Search** menu bar, select the **Indexes - Holdings Keyword Definitions** button.

Result: The **Indexes - Holdings Keyword Definitions** list box appears.

If you are ...**Then ...**

Adding a
new
definition

click the **New** button

Result: The **New Keyword Definition** dialog box appears.

click the **Edit** button

Editing an
existing
definition

Result: The **Edit Keyword Definition** dialog box displays (see [Figure 8-55](#)).

At any time:

- The **Save** button saves your information
- The **Cancel** button closes the dialog box without saving.

Figure 8-55. New Indexes - Holdings Keyword Definition Dialog Box

2. Click the **Index** tab.

Result: The **Index** dialog box displays (see [Figure 8-55](#)).

3. Enter a code for the database in the Code field (40 characters maximum, alphanumeric).
4. Select the appropriate Z39.50 Use attribute for the database.

5. The OPAC Suppress and Staff Suppress checkboxes are selected and inactive. They cannot be changed for Holdings Keyword Searches.
6. Click the **Definitions** tab.

Result: The **Definitions** dialog box displays (see [Figure 8-56](#)).

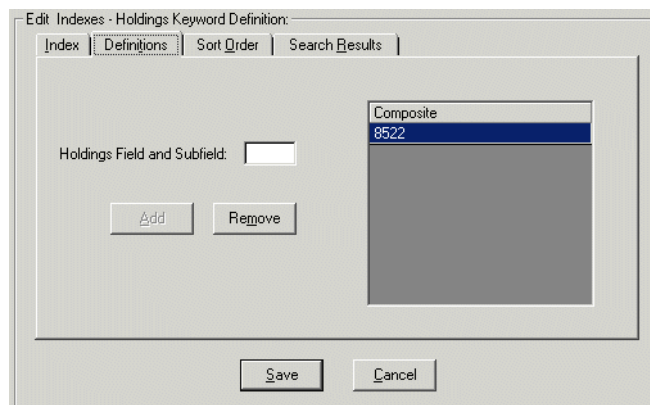


Figure 8-56. Holdings Keyword Definitions Tab

On the **Definitions** dialog box:

7. Enter the desired field and subfield in the **Holdings Field and Subfield** field.
8. Click the **Add** button to move the field and subfield to the **Composite** column.

To remove an element from the **Composite** column, highlight the element to remove and then click the **Remove** button.



IMPORTANT:

At least one field and subfield combination must be assigned to the composite, for the definition to be saved.

9. Select the **Sort Order** tab.

Result: Invokes the **Sort Order** dialog box (see [Figure 8-57](#)).

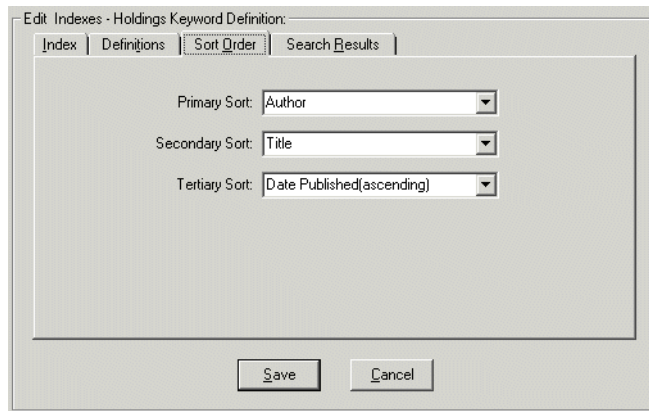


Figure 8-57. Holdings Keyword Sort Order Dialog Box

On the **Sort Order** tab:

10. Select the Primary, Secondary, and Tertiary sort points.
11. Select the **Search Results** tab.

Result: Displays the search Results dialog box (see [Figure 8-58](#)).

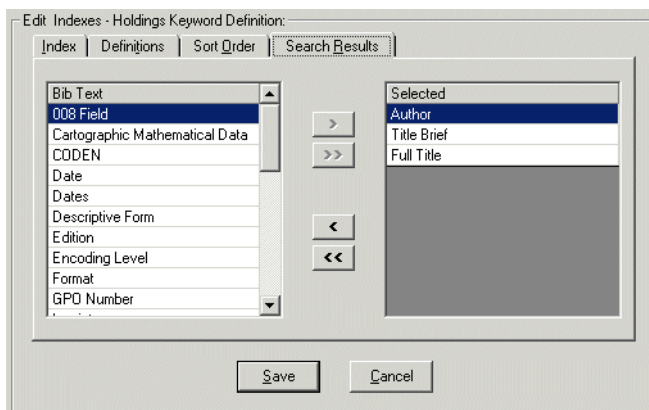


Figure 8-58. Holdings Keyword Search Results Tab

On the **Search Results** dialog box:

12. Highlight the desired bibliographic text component in the **Bib Text** list.

13. Click the > button to move components to the **Selected** column.

NOTE:

The columns will display in the order you select them, from left to right, in WebVoyage and the Voyager staff modules.

To remove an element from the **Selected** column, highlight the element to remove and then click the < button.

You can add all of the available groups to the **Selected** column list by clicking the >> button.



IMPORTANT:

At least one component must be assigned to the Selected list, for the search to be saved.

To remove an index from the **Selected** list, highlight the index and then click the < button. The index moves back to the **Bib Text** list.

To remove all indexes from the **Selected** list, click the << button. All of the selected indexes move back to the **Bib Text** list.

NOTE:

Holdings Keyword indexes have the **Bib Text** list because, even though they are holdings indexes, the information from the bibliographic record (linked to the MFHD record) displays in the Holdings Index title list screen when viewing results in the Voyager staff modules.

14. Click the **Save** button to save your information. Otherwise, click the **Cancel** button to close the dialog box without saving.

Simultaneous Search De-Duplicating

Simultaneous searching allows you to conduct a search while simultaneously searching many databases at the same time from WebVoyage.

Your simultaneous search profiles will indicate which fields the system will check to identify duplicate records. Once a duplicate record has been established, the simultaneous search function will use the record from the database that has the highest weight (priority). For more information about database weights, see [Database Definitions](#) on [page 8-17](#).

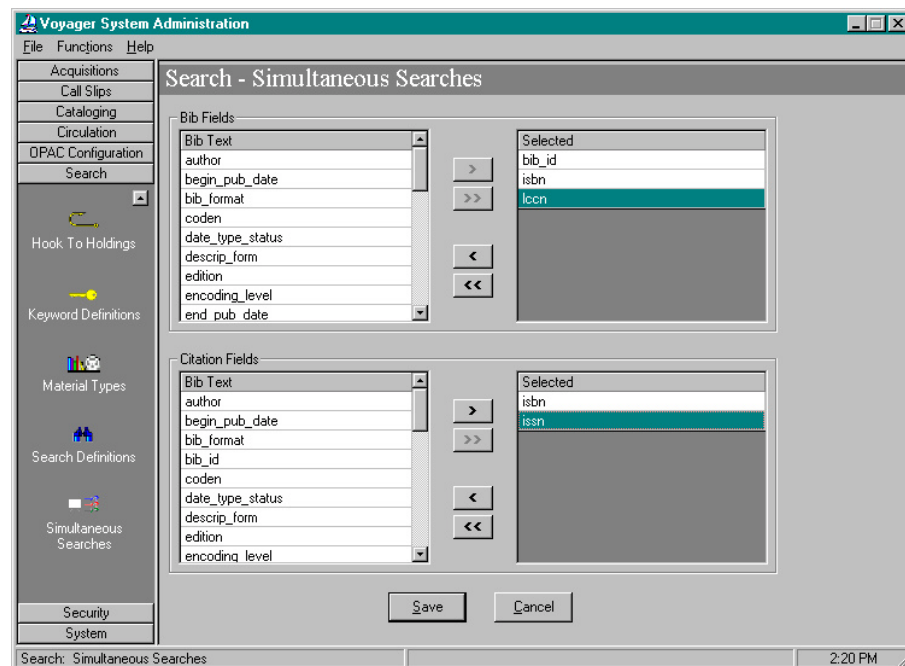


Figure 8-59. Simultaneous Search De-Duplicating Screen

On the **Simultaneous Search Profile** dialog box, use the select (>) button to add (in prioritized order) the fields the simultaneous search function should check for duplicate records.

The >> button will place the fields in the **Selected** box (the box that simultaneous search will check). The << button will place the fields back and simultaneous search will not use them to check for duplicate records.

The Bib Fields boxes will instruct the simultaneous searching function to check for duplicate fields when searching records in the remote (Voyager to Voyager) databases.

The Citation Fields will instruct the simultaneous searching function which fields in the Z39.50 database to check for duplicate records. The OPAC duplicate field checking is set up in the Cataloging Group Definitions.

15. Click **Save** to save your work or click **Cancel** to exit the dialog box.

Title List Column Names

The bibliographic record fields that display on the Title List as the result of a search can be edited. Do this by changing the Display Names of the bib fields in the Title List Column Names section of Voyager System Administration (see [Figure 8-60](#)). The Display Names are necessary because the names of the Bib Fields themselves are pre-established and cannot be changed.

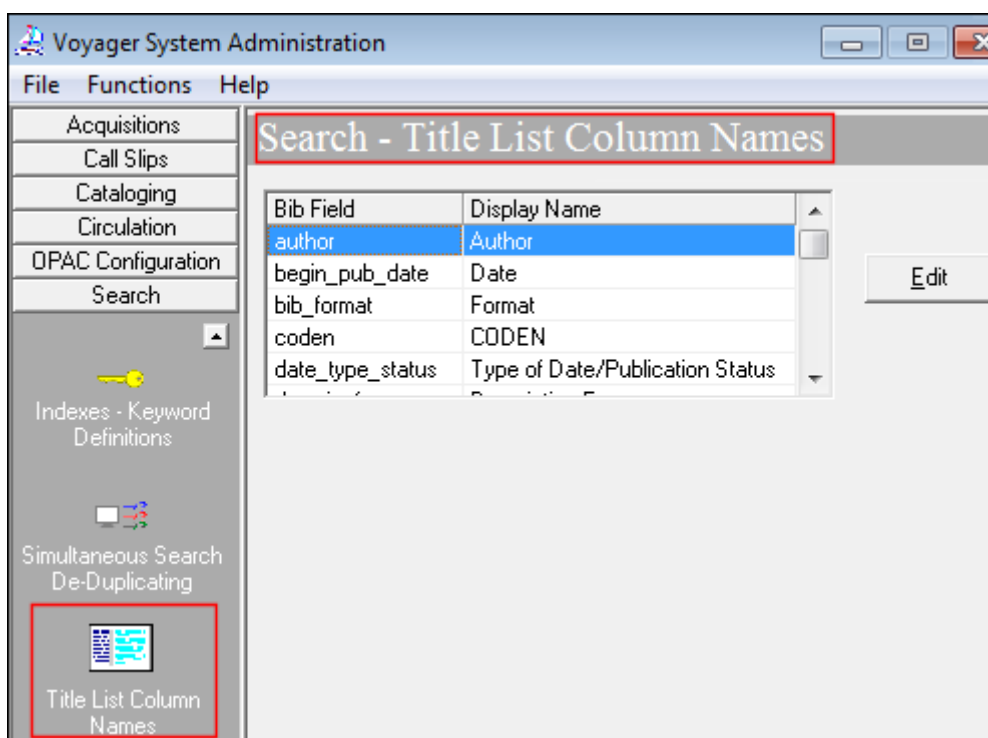


Figure 8-60. Title List Column Names

NOTE:

The Title List Column Names section of Voyager System Administration is where the *names* of the indexes displayed in WebVoyage are determined. You set the actual fields from which to display the record information in the corresponding searches definition configuration (Keyword, Composite, Search).

In other words, to name the author search *Author(s)*, you would set the **author Bib Field** name to **Author(s)**. To make WebVoyage display the information from the author Bib Field in WebVoyage, include the *Author(s)* Bib Text in the Search Results dialog box of the desired search.

The Display Name set in Title List Column Names display wherever the corresponding Bib Fields are selected for use (such as the Search Results dialog box of the different search definition sections). For more information about search definitions see [Indexes - Composite Definitions](#) on [page 8-51](#), [Indexes - Headings & Left-Anchored Definitions](#) on [page 8-64](#), or [Keyword Definitions](#) on [page 8-68](#).



Procedure 8-13. Editing Title List Column Names

1. From the Search menu bar, Select the **Title List Column Names** button.

Result: Invokes the **Search - Title List Column Names** list box (see [Figure 8-60](#)).

At any time:

- The **Save** button saves your information.
- The **Cancel** button closes the dialog box without saving.

Bib Field	Display Name
coden	CODEN
date_type_status	Type of Date/Publication Status
descrip_form	Descriptive Form
edition	Edition
encoding_level	Encoding Level

Edit Bib Display Text:

Bib Field:

Display Name:

Figure 8-61. Sample Bib Display Text Definition

2. Select the Bib Field you wish to name and click the edit button.

Result: The Edit Title List Column Names dialog box displays (see [Figure 8-61](#)).

NOTE:

The Bib Field entries are not editable.

3. Enter the name that you want displayed for that Bib Field in the **Display Name** field (40 alphanumeric characters maximum).
 4. Click the **Save** button.
-

Title List Material Types Display

You can specify the Material Types which correspond to the material type codes in the leaders of your MARC records. Do this on the Title List Material Type Display screen (see [Figure 8-62](#)).

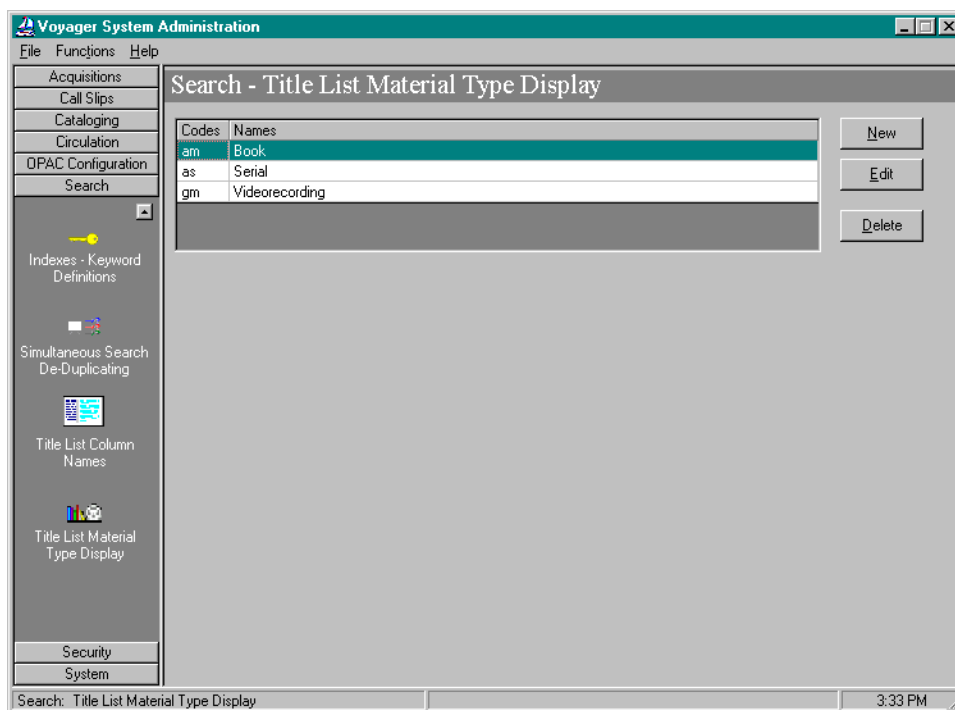


Figure 8-62. Title List Material Type Display List Box

The Material Type Code consists of the 2-character code located in the leader byte positions 6 and 7 of the desired material type. The Material Type is a 40-character definition for the material type that you are defining.



Procedure 8-14. Adding or editing a Material Type Definition

Perform the following steps to add or edit a Material Type Definition:

1. From the Search menu bar, Select the **Title List Material Type Display** button.

Result: Invokes the Title List Material Type Display list box (see [Figure 8-62](#)).

If you are...	Then...
Adding a new material type	click the New button

Result: The New Title List Material Type Display dialog box displays (see [Figure 8-63](#)).

Editing an existing material type	click the Edit button

Result: The Edit Title List Material Type Display dialog box displays.

At any time you may click one of the following:

- The **Save** button saves your information.
- The **Cancel** button closes the dialog box without saving.

Codes	Names
aa	Monograph component
ab	Serial component
ac	Collection
ad	Archival subunit
am	Book (monograph)

New Title List Material Type Display:

Material Type Code:

Material Type Name:

Figure 8-63. New Title List Material Type Display

2. If adding a new material type, enter the data for leader byte positions 6 and 7 in the **Material Type Code** field.

Example: To create a material name for display of language material, monograph/item (leader bytes 6 and 7 of *am*) enter **am** into the Material Type Code field.

3. Enter the display name in the **Material Type Name** field.

Example: To name the language material, monograph/item (leader bytes 6 and 7 of *am*) material type *Book*, enter **Book** in the Material Type Name field.

4. Click the **Save** button.
-

Introduction

The Security section of the System Administration module defines all the operators who use the system. Also, security profiles are created that determine the activities each operator can perform.

This chapter discusses:

- [Overview of Security](#)
- [Common Elements in all Security Profiles](#)
- [Locations and Security](#)
- [Operator Profiles](#)
- [Master Security Profiles - Creating, Editing, and Deleting](#)
- [Acquisition/Serials Profiles - Creating, Editing, and Deleting](#)
- [Cataloging Profiles - Creating, Editing, and Deleting](#)
- [Circulation Profiles - Creating, Editing, and Deleting](#)
- [Analyzer Profiles - Creating, Editing, and Deleting](#)
- [Global Data Change Profiles](#)
- [Security Options](#)

Overview of Security

Voyager security features help protect the integrity of your library database against unauthorized operators. Use the security portion of the System Administration module to:

- Identify who may use the staff modules
This is handled through the Operator Profile.
- Establish Security Profiles that define the Voyager functions that an individual or a group of individuals can perform in the Acquisitions/Serials, Cataloging, Circulation, and System Administration modules for items at all or selected Locations
- Link each Operator ID and password to one or more of the Security Profiles

Logging in to the System Administration Module for the First Time

A permanent Operator Profile named System Administrator is set up as a control profile for initial access to the System Administration module before you have established your own Security Profiles.



IMPORTANT:

Since this user's guide may be seen by many people, we recommend that you immediately edit this profile to change the password to one of your own choosing and notify Customer Support of the new password. This helps prevent unauthorized access to the module. You cannot delete this control profile.



Procedure 9-1. Logging in to the System Administration Module

Use the following to log in to the System Administration Module.

1. At the **Login** dialog box, enter the following operator ID and password, in the **Operator ID** field and the **Password** field to access the Voyager System Administration module (see [Figure 9-1](#)).

Operator ID: SYSADMIN

Password: EISI



Figure 9-1. System Administration Login Dialog Box

NOTE:

Operator IDs and passwords are case sensitive. Use uppercase when entering SYSADMIN and EISI. The system displays asterisks when entering a password.

2. Click **OK**.

Result: The System Administration module opens.

Accessing the Security Workspaces

The **Security** listbar provides access to the various security profiles and operator profile workspaces. When an operator clicks one of the buttons in the listbar, the corresponding workspace opens.

The System Administrator operator profile and other operators linked to a Master security profile, where the **Security** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Security** workspaces. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

The **Acquisitions/Serials**, **Cataloging**, **Circulation** and **Analyzer Profiles** workspaces allow the operator to set up specific privileges for activities to be performed in the Acquisitions, Cataloging, Circulation, and Analyzer modules respectively.

The **Master Profiles** workspace allows the operator to grant access to the various workspaces in the System Administration module.

The **Operator Profiles** workspace is where operators are added to the system with their operator ID and passwords.

Creating Profiles

Voyager has no limit to the number of operators or Security Profiles you identify to the system. However, an operator can only be linked once to each of the Security Profiles.

Typically, sites do not want to create Security Profiles for each individual as that requires a great deal of data entry. Voyager allows you to link operators who perform the same tasks from the same Locations to the same Security Profile(s). Before you begin to enter data into the System Administration module, you should develop a preliminary list of Security Profiles based on staff positions and activities. This helps you to reduce the number of custom profiles you need for individuals.

Configuring Security Profiles becomes as simple or as complex as your needs and policies dictate and as simple or as complex as the number of operators and their job responsibilities. Libraries with relatively large staffs where job tasks tend to be more specialized and limited to one functional area usually need more Security Profiles than a smaller site where individuals perform a wider array of tasks. Also as a general rule, the more decentralized your operations (that is, the more Policy Groups you have), the greater the number of Security Profiles.

The end result is apparent when an operator logs into the system and displays menus, button bars, and tool bars in the Voyager client. The operator sees available functions but can perform only those that are active.

Common Elements in all Security Profiles

The various Security Profiles (Acquisitions/Serials, Analyzer, Cataloging, Circulation, and Master) define what activities each operator is allowed to perform.

Most of the Security Profiles include the following:

- A profile name which is defined on the **Profile Name** tab
- The operators associated with the profile which is defined on the **Operators** tab
- The activities that the operators associated with the profile may perform that are defined on the **Profile Values** tab
- The Locations associated with the profile that are defined on the **Locations** tab.

When first accessing a profile workspace, a list of current profiles displays. The example in [Figure 9-2](#) shows two cataloging profiles.

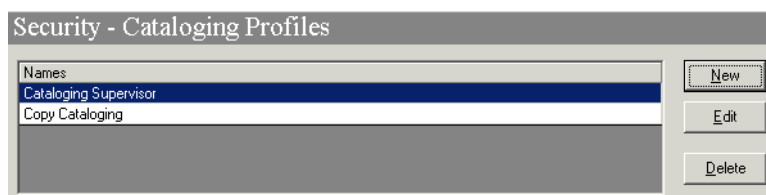


Figure 9-2. Security - Cataloging Profiles Workspace List of Profiles

After clicking the **New** or **Edit** button, the bottom half of the workspace opens. This portion of the workspace contains a **Profile Name**, **Operators**, **Profile Values**, and **Locations** tabs (see [Figure 9-3](#)).

These tabs are common to all the security profile workspaces. The contents and functions of the tabs are essentially the same.

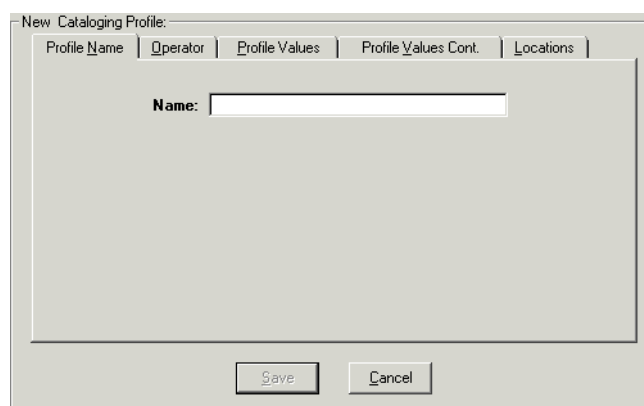


Figure 9-3. Bottom Half of the Cataloging Profile Workspace

[Table 9-1](#) through [Table 9-4](#) describe the tabs and fields found in the various security profile workspaces.

Table 9-1. Profile Name Tab

Fields or Sections	Description	Required	Type and Range
Name	The name given to the Security Profile. Use names that suggest the scope of the authority being conferred such as a job title or a specific task. A personal name could indicate a profile linked to only one Operator Profile. Profile Names sort in A-Z order when the system displays a list.	Yes	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 25 characters.

[Figure 9-4](#) is an example of the **Operator** tab found on the **Acquisitions/Serials Profile** workspace. All of the security profile workspaces have an **Operator** tab, On this tab, specific operators are linked to the profile.

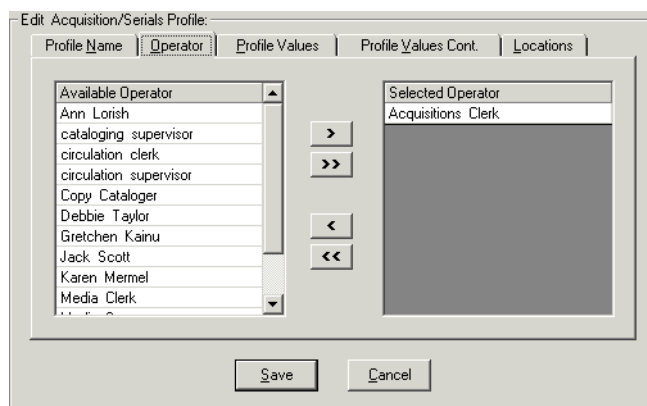


Figure 9-4. Operator Tab

[Table 9-2](#) describes the fields found on the **Operator** tab of the various security profile workspaces.

Table 9-2. Operator Tab

Fields or Sections	Description	Required	Type and Range
Available Operators list box	List of all available operators. These operators are not yet linked to the profile. Operators linked to a profile will not be listed.	Yes	This list is all available operators defined in the System Administration module, established in the Operator Profiles workspace. Operator Profiles on page 9-15 .
Selected Operators list box	List of operators selected to be linked to that profile. That is, who have the privileges granted in the selected profile.	Yes	

[Figure 9-5](#) is an example of the **Profiles** tab found in the **Circulation Profile** workspace. All of the security profile workspaces contain this tab. However, the content of the tab varies. On this tab, the ability to perform specific tasks are granted to the operators who are linked to the profile. For example, the ability to edit a patron record may be granted to a circulation operator and the ability to create a purchase order may be granted to an acquisitions operator.

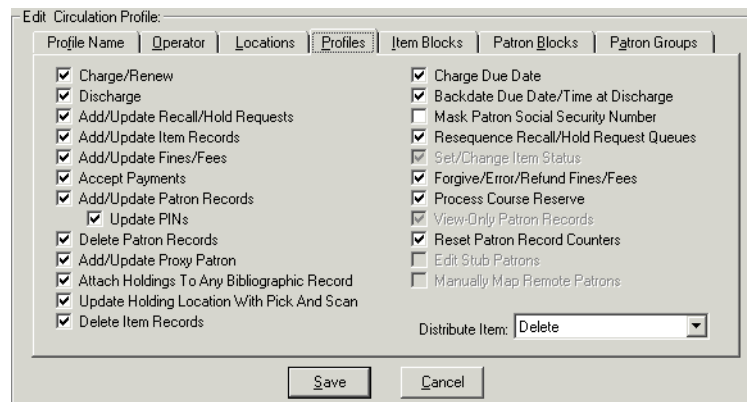


Figure 9-5. Profiles Tab for a Circulation Profile

[Table 9-6](#) explains the **Profiles** tab of the various security profile workspaces.

Table 9-3. Profiles Tab

Fields or Sections	Description	Required	Type and Range
The fields in the Profiles tab varies depending upon the type of profile being created. For example, an acquisitions profile might include the ability to create a ledger and fund, and a circulation profile might include the ability to back-date a due date.	The Profiles tab contains the specific activities that operators associated with the profile may engage in. See the specific sections later in this chapter for more information	Yes	Check boxes. When a box is checked, the specific action is for operators associated with that profile.

[Figure 9-6](#) is an example of the **Locations** tab found in the Master profile workspace. On this tab, specific locations are linked to the profile.

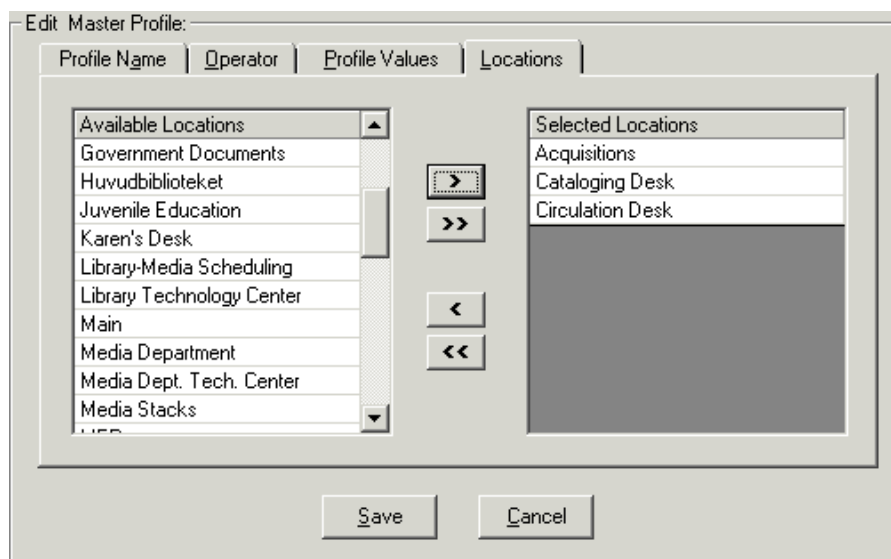


Figure 9-6. Locations Tab

[Table 9-4](#) describes the fields found on the **Locations** tab of the various security profile workspaces.

Table 9-4. Locations Tab

Fields or Sections	Description	Required	Type and Range
Available Locations	List of all available Locations.	Yes	Choose from Available list. Locations are defined in System Administration. Locations on page 10-39 .
Selected Locations	List of locations where the operator can perform activities or the locations of records that the operator may perform activities on.	Yes	
All Locations	This option specifies that all existing locations whether selected or not are to be considered part of this profile, as well as any future locations that might be added. NOTE: This is only available when creating a Circulation profile.	No	Check box The default is unchecked.

Locations and Security

Locations are linked to operator profiles, and thereby, linked to operators. This linkage determines whether the operator has access to that location. It determines what Locations an operator sees when he or she displays a list and restricts an operator to performing specific tasks only for items at those Locations. This linking occurs in the System Administration module, **Security - Acquisitions/Serials, Cataloging and/or Circulation Profiles** workspaces.

Whenever a Security Profile requires a selection of Locations, the system supplies a choice of all Locations for fast and easy definition. Whether you restrict operators to performing tasks only for items at selected Locations or all Locations relates to the number of Policy Groups that you have defined. The more Policy

Groups that you have defined is an indication of decentralized operations. That is, more individuals perform tasks only for items at certain locations. This in turn typically means that more Security Profiles need to be defined.

Locations, Security Profiles, and Policy Groups

Voyager has been designed with the known requirements of many larger academic libraries in mind. Generally speaking, the larger a library, the more urgent the need to restrict an individual's security authorization to perform tasks only for items housed at a specific subset of the total number of established Locations. The Voyager Policy Groups allow a library to group Locations that share common policies. The Voyager Security Profiles allow you to designate the Locations for which an operator can perform tasks.

The simplest way to administer Voyager security is through Locations. However, larger libraries with more complex work assignments can assign selected Locations from multiple Policy Groups to Security Profiles.

The happening locations in an operator's security profile are locations at which the operator can log in and work. However, the specific activities an operator can perform at a happening desk, that is charge books, accept payment, create an invoice, is not governed by the location.

The storage locations in an operator's security profile allow the operator to work with an item that is, or will be, stored at that location.

In most cases, an operator that does not have a location in his or her profile cannot work at that location or do anything related to an item that belongs to that location.

NOTE:

Circulation operators are permitted to add, delete, or modify notes and statuses for items that belong to a location that is not in the operator's security profile.

[Figure 9-7](#) displays an example of how locations can limit access.

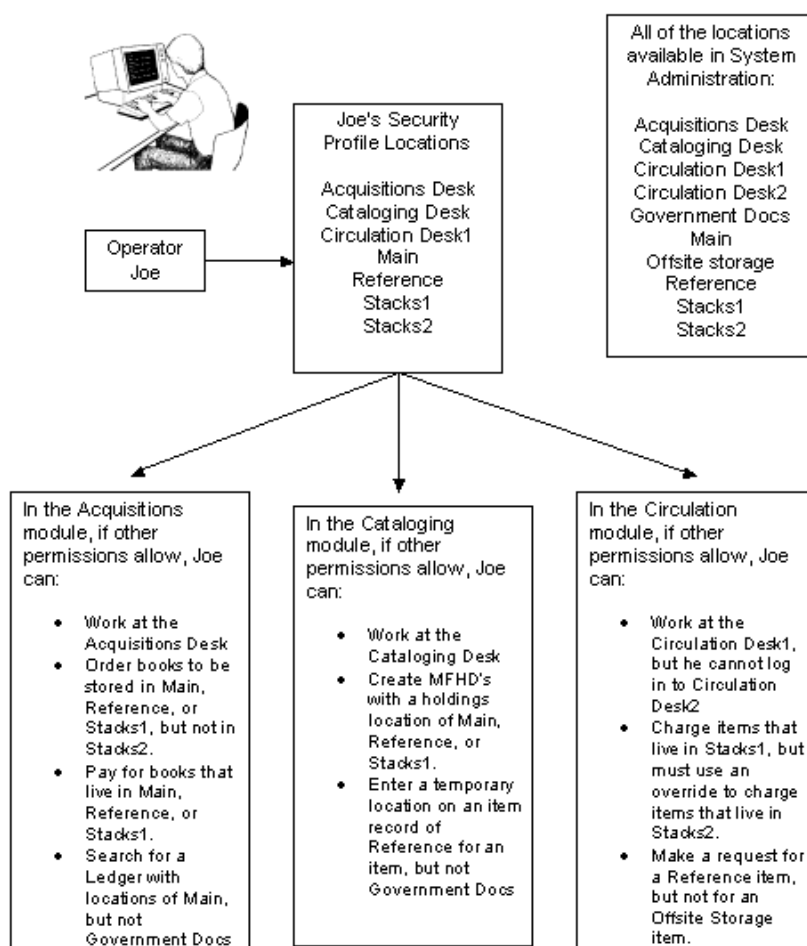


Figure 9-7. Example of How Locations Limit Access

Happening Locations in the Operator Profile

In order for operators to log into a module, they must have a happening location for that module in their security profile.

Unable to Log in to a Module

If an operator does not have a security profile established for a particular module, they do not have a happening location for that module. As a result, they are not able to log in to that module. For example, if an operator has no Cataloging security profile and attempts to log in to the Cataloging module, access won't be allowed and the message in [Figure 9-8](#) displays.

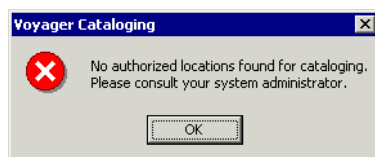


Figure 9-8. No Cataloging Security Profile

If an operator does have a security profile established, but there are no happening locations in that profile for a particular module, that module cannot be accessed. For example, if there are no Circulation desks in an operator's profile and an attempt to log in is made, access to the Circulation module won't be allowed and the message in [Figure 9-9](#) displays.



Figure 9-9. No Happening Locations in the Operator's Circulation Security Profile

Logging in to a Module

When an operator's profile contains a single happening location, that is the location that is accessed when logging into the system.

For an operator with a profile containing multiple happening locations in System Administration, the system prompts for the operator to select a location. The location that the operator chooses allows Voyager to apply the rules from the correct policy group to the operator's activities.

Acquisitions Module

[Figure 9-10](#) displays the dialog box the operator gets when logging in to the Acquisitions module. In this example, the operators security profile contains three different locations that are receiving locations (since the **Receive Location** check box on the **Locations** tab of the **Acquisitions - Policy Definitions** workspace in the System Administration module is checked).

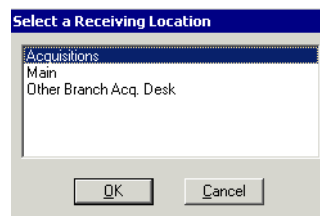


Figure 9-10. Select a Receiving Location (Acquisitions Logon)

The operator selects a location and the activities that the operator can perform while logged in to that Acquisitions desk depend on settings in the System Administration module **Security - Acquisitions/Serials Profiles** workspace.

Acquisitions/Serials Security Profiles control which functions an operator can perform in the Acquisitions/Serials module. You add a location to the security profile for each staff person working in an order or receiving department. For example, in order for an operator to change an order or invoice for locations that are in separate policy groups, the security profile must include all of the right locations.

Cataloging Module

[Figure 9-11](#) displays the dialog box the operator gets when logging in to the Cataloging module. In this example, the operator's security profile contains three different locations that are Cataloging locations (since the **Catalog Location** check box on the **Locations** tab of the **Cataloging - Policy Definitions** workspace in the System Administration module is checked).

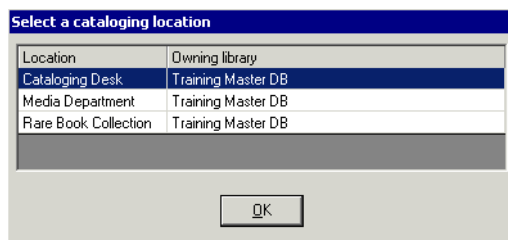


Figure 9-11. Catalog Log On, Select a Cataloging Location

The operator selects a location and the activities that the operator can perform while logged in to that cataloging desk depend on the settings in the System Administration module **Security - Cataloging Profiles** workspace.

Cataloging Security Profiles control which functions an operator can perform in the Cataloging module. Each staff person working in a routing or cataloging department who performs tasks using Voyager need an operator profile linked to one Cataloging Security Profile.

Circulation Module

[Figure 9-12](#) displays the dialog box the operator gets when logging in to the Circulation module. In this example, the operator's security profile contains four different locations that are Circulation locations (since the **Circulation Location** check box on the **Locations** tab of the **Circulation - Policy Definitions** workspace in the System Administration module is checked).

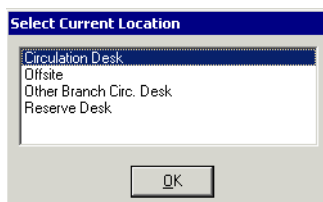


Figure 9-12. Circulation Log On, Select a Cataloging Location

The operator selects a location and the activities that the operator can perform while logged in to that Circulation desk depend on the settings in the System Administration module **Security - Circulation Profiles** workspace.

Circulation Security Profiles control which functions an operator can perform in the Circulation module. Each staff person working at a circulation desk who performs tasks using Voyager need an operator profile linked to one Circulation Security Profile.

Operator Profiles

Each operator who uses a Voyager staff module must have an operator profile containing a name, operator ID, and password. The system requires operators to log in to Voyager staff modules by entering their operator ID and password.

The link between an operator profile and a security profile determines what functions the operator can and cannot perform in any module.

Operator IDs and passwords are case sensitive and must be entered at login exactly as entered in the operator profile. After staff begin using their operator IDs and passwords, they have the flexibility to dynamically change the password from the File menu in the clients (see [Figure 9-13](#)).

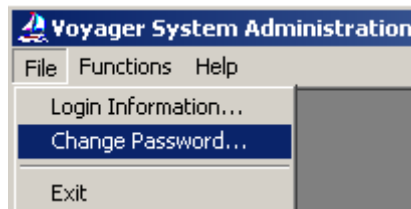


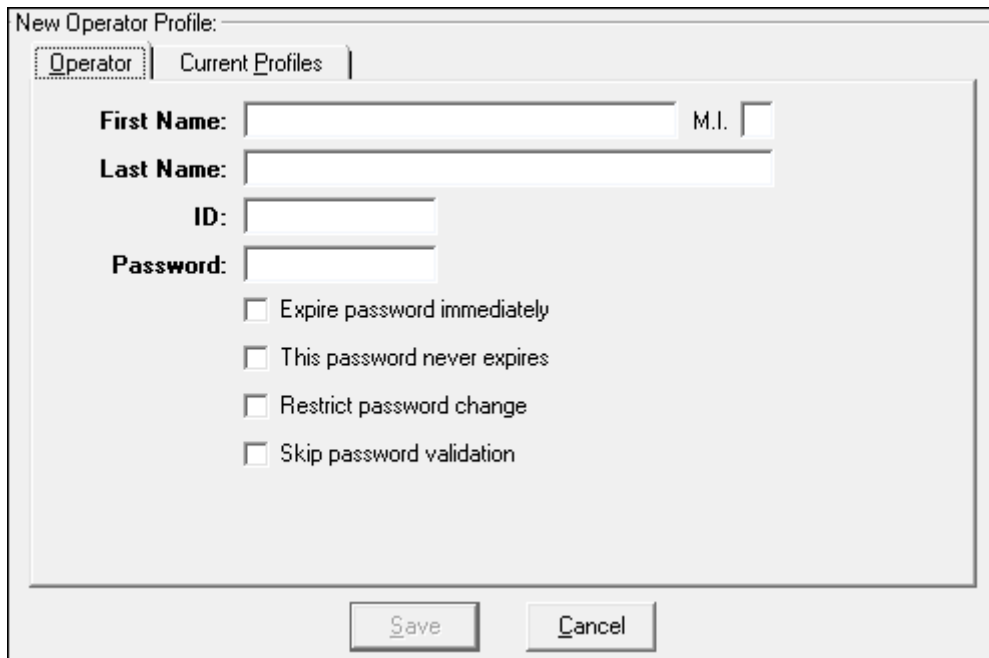
Figure 9-13. File Menu Change Password Option

The system includes operator IDs in transaction logs. As a result, IDs display on printed reports and online displays. This may influence your operator naming convention, in order to make identification easier.

Operator Profiles Workspace

The **Security - Operator Profiles** workspace contains two tabs, the **Operator** tab and the **Current Profiles** tab.

See [Figure 9-14](#) and [Figure 9-15](#) for examples of the **Operator** tab and [Table 9-5](#) for a description of this dialog box.



The image shows a 'New Operator Profile' dialog box with two tabs: 'Operator' (selected) and 'Current Profiles'. The 'Operator' tab contains the following fields and options:

- First Name:** A text input field followed by an 'M.I.' (Middle Initial) checkbox.
- Last Name:** A text input field.
- ID:** A text input field.
- Password:** A text input field.
- Four checkboxes for password policies:
 - ☐ Expire password immediately
 - ☐ This password never expires
 - ☐ Restrict password change
 - ☐ Skip password validation

At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

Figure 9-14. Operator Tab - New Entry

Edit Operator Profile:

Operator | Current Profiles

First Name: **M.I.**

Last Name:

ID: **Change Password...**

Status: ☐ This password never expires

☐ Restrict password change

Lockout Status... **Expire Account Now**

Create Date:

Modify Date:

Modify Operator:

Save **Cancel**

Figure 9-15. Operator Tab - Edit Existing Entry

Table 9-5. Operator Tab

Field Name	Description	Required	Type and Range
First Name	The first name of the operator.	Yes	Alphanumeric, punctuation and spaces Uppercase and lowercase allowed 25 characters

Table 9-5. Operator Tab

Field Name	Description	Required	Type and Range
M.I.	The operator's middle initial.	No	Alphanumeric, punctuation and spaces Uppercase and lowercase allowed 1 character
Last Name	Last name (surname) of the operator.	Yes	Alphanumeric, punctuation and spaces Uppercase and lowercase allowed 25 characters
ID	Operator's ID to be used when logging on to the system.	Yes	Alphanumeric, punctuation and spaces Uppercase and lowercase allowed (the field is case sensitive) 10 characters

Table 9-5. Operator Tab

Field Name	Description	Required	Type and Range
Password	Operator's password to be used when logging in to the system. You can configure the parameters for operator passwords. The following password criteria are configurable: • Minimum and maximum password length • Minimum and maximum password age • Number and format of characters allowed including upper- and lower-case letters, numbers, and special characters • Any password group requirements (such as your password must contain at least three of the following four types of characters) • Whether the user's password can contain the user's name or ID • The system administrator can determine how many previous passwords are saved in Voyager. The previous passwords are used for comparison to make sure that a new password is not the same as the previously used passwords. • The library system administrator can specify the number of days before expiration to display an alert to warn staff that their password is about to expire. • The library system administrator can define a lockout counter, the lockout duration, and the number of invalid attempts after which a user's account is locked. Additionally, the invalid login attempts can be recorded in a security audit log.	Yes	See the Description

Table 9-5. Operator Tab

Field Name	Description	Required	Type and Range
Password (continued)	System Administrators have an option to record invalid login attempts to the Voyager staff clients. If logged, invalid login attempts record the user ID, operator name, date and time, lockout counter, and lockout time of the login attempts. Additionally, the security audit log can be exported, cleared, or refreshed by the system administrator. NOTE: You are responsible for describing the password requirements to users. This description is displayed to staff when using the Change Password feature in any of the staff clients.		
Status	Displays the state of the operator account as Active or Expired.	System supplied	
Expire password immediately	Use this setting to have the password expire as soon as the user logs in for the first time and thereby requires them to enter a new password immediately.	No	
This password never expires	Use this setting if you never want the password to expire for the operator profile you are creating.	No	
Restrict password change	Select this option to prevent an operator from being able to change passwords.	No	
Skip password validation	Select this password option when you do not want this operator's password to be checked to meet certain criteria.	No	

Table 9-5. Operator Tab

Field Name	Description	Required	Type and Range
This account never expires	Use this check box to identify that the password for this operator account is not to be expired by the system. As a result, this operator account is not prompted to change the password. This is especially convenient for operator accounts established for certain processes such as self-check or NCIP connections.	No	
Expire Account Now	Use this button to immediately expire the account. As a result, the next time the operator logs in, he is prompted to change the password.	No	
Create Date	Displays the date on which the operator account was created.	System supplied	
Modify Date	Displays the date on which the operator account was last modified.	System supplied	
Modify Operator	Displays the ID of the operator that modified the operator account on the Modify Date.	System supplied	

The **Current Profiles** tab (see [Figure 9-16](#)) displays the name and ID of the security profiles to which an operator account is linked. This list of current profiles could display profile links to any or all of the following:

- Acquisition/Serials
- Cataloging
- Circulation
- Master
- Analyzer
- Global Data Change

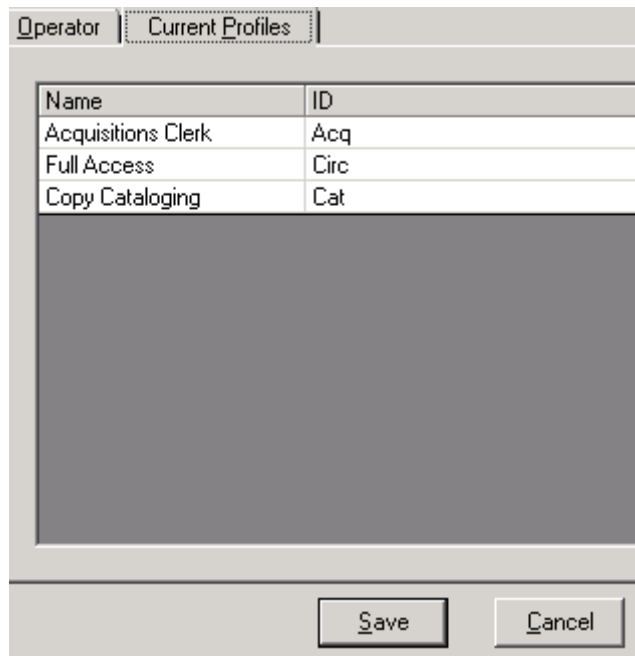


Figure 9-16. Current Profiles

Creating an Operator Profile

To create an operator profile, the administrator must enter a name, ID, and password.



Procedure 9-2. Creating an Operator Profile

Use the following to create an Operator Profile.

1. Access the **Security - Operator Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Operator Profiles** button in the **Security** listbar.

Result: The **Security - Operator Profiles** workspace opens.

2. Click the **New** button to create a profile.

Result: The bottom half of the workspace opens with the **Operator** and **Current Profile** tabs.

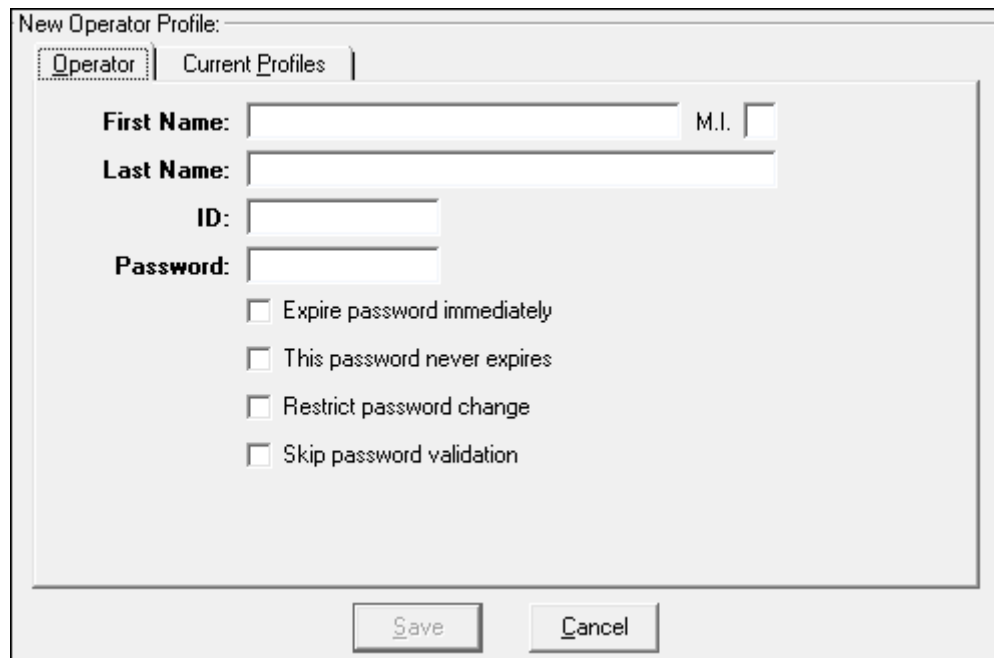
The image shows a 'New Operator Profile' dialog box. It has two tabs: 'Operator' (selected) and 'Current Profiles'. The 'Operator' tab contains several input fields: 'First Name' (with a text box and an 'M.I.' dropdown), 'Last Name' (with a text box), 'ID' (with a text box), and 'Password' (with a text box). Below these fields are four checkboxes: 'Expire password immediately', 'This password never expires', 'Restrict password change', and 'Skip password validation'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Figure 9-17. New Operator Profile Dialog Box

3. Enter the operator's first name, middle initial (optional), last name, ID, and password in the corresponding fields (see [Table 9-5](#)).

Optionally, select the following settings that apply to the operator profile that you are creating:

- Expire password immediately
 - This password never expires
 - Restrict password change (Select this option to prevent an operator from being able to change passwords.)
 - Skip password validation
4. Click the **Save** button to save the operator. Click the **Cancel** button if you do not want to save the information.

Result: The operator profile is created and added to the list of operators.

Editing an Operator Profile

You may change or delete any information in an operator profile. When you edit a profile, the system saves the original create date, the last modify date, and the operator ID of the operator who last modified the profile.



Procedure 9-3. Editing an Operator Profile

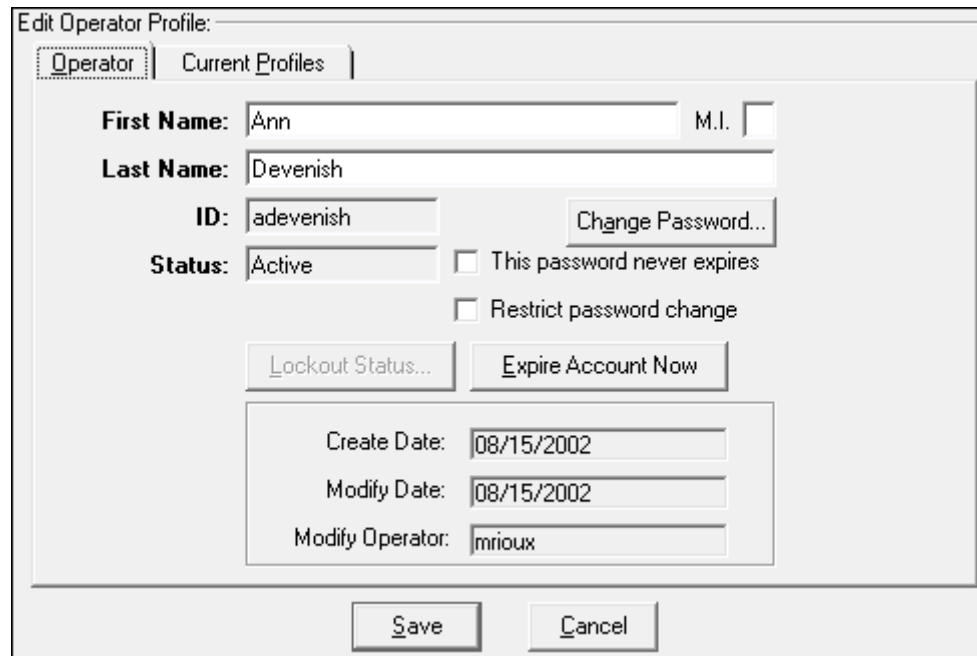
Use the following to edit an operator profile.

1. Access the **Security - Operator Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Operator Profiles** button in the Security listbar.

Result: The **Security - Operator Profiles** workspace opens.

2. Click the row of the operator account that you want to edit.
3. Click the **Edit** button.

Result: The bottom half of the workspace opens with the **Operator** and **Current Profile** tabs.



Edit Operator Profile:

Operator | Current Profiles

First Name: Ann **M.I.** ☐

Last Name: Devenish

ID: adevenish **Change Password...**

Status: Active ☐ This password never expires

☐ Restrict password change

Lockout Status... **Expire Account Now**

Create Date: 08/15/2002

Modify Date: 08/15/2002

Modify Operator: mrioux

Save **Cancel**

Figure 9-18. Edit Operator Profile

4. Edit any of the fields on the **Operator** tab. See [Table 9-5](#) for a description of the options.

NOTE:

To add or remove security profile links displayed on the Current Profiles tab, you need to access the specific security profile(s) from the Security listbar to make those changes.

5. Click the **Save** button or **Cancel**.

Deleting an Operator

Any operator profiles may be deleted with the exception of the System Administrator operator profile.

NOTE:

This operator profile is a control profile and cannot be deleted. However, its password can, and should be, changed.



Procedure 9-4. Deleting an Operator

Use the following to delete an operator profile.

1. Access the **Security - Operator Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Operator Profiles** button in the Security listbar.

Result: The **Security - Operator Profiles** workspace opens.

2. Click the row of the operator account that you want to delete.
3. Click the **Delete** button.

Result: A message asking for confirmation of the deletion displays (see [Figure 9-19](#)).

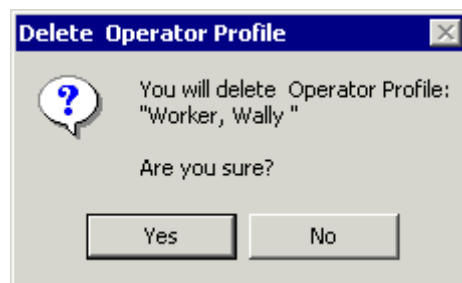


Figure 9-19. Confirmation Message Before Deleting an Operator

4. Click **Yes** to delete the operator.

Result: The operator is deleted and his name and ID are no longer in the list in the **Security - Operator Profiles** workspace.

Master Security Profiles - Creating, Editing, and Deleting

Master Security Profiles control access to the System Administration module itself. An Operator Profile linked to a Master Security Profile has the ability to add, edit, or delete values for the following:

- Security
- System-Wide Configuration
- Acquisitions/Serials Policy Groups
- Cataloging Policy Groups
- Circulation Policy Groups
- Cluster Edit and Cluster View-Only
- Cluster Create and Delete (if your site has multiple Circulation Clusters)
- Patron Groups
- Media Policy Groups

The best way to think of a Master Security Profile is as providing authorization to authorize. For example, if the head of the order department wanted to handle all order department staff security authorizations, her Operator Profile would have to link to a Master Security Profile that would permit her to add, edit, or delete Operator Profiles and to link or unlink those Operator Profiles to Acquisitions/Serials Security Profiles.

The same Master Security Profile might also include authorization for the department head to make changes to the Acquisitions/Serials Policy Group value.

The **Security - Master Profiles** workspace links a profile with operators, profile values, and locations (see [Figure 9-20](#)) it contains the tabs, **Profile Name**, **Operator**, **Profile Values**, and **Locations**.

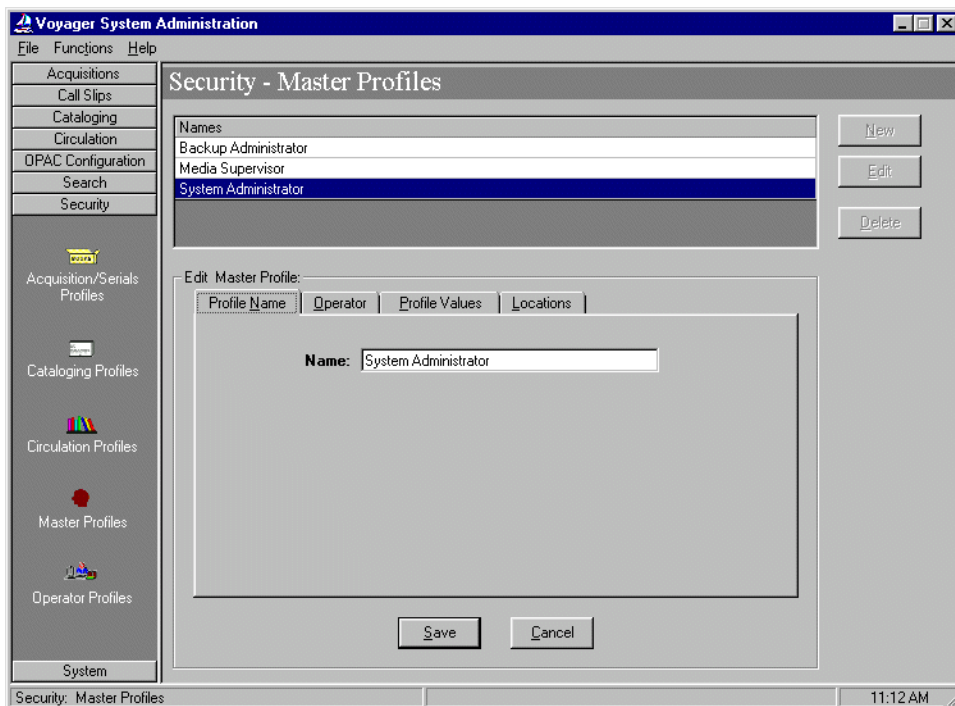


Figure 9-20. Security - Master Profiles Workspace, Profile Name Tab

The **Profile Name**, **Operator**, and **Locations** tabs are common elements and discussed in section [Common Elements in all Security Profiles](#) on [page 9-4](#).

Profile Value Tab

This section discusses the **Profile Value** tab that is specific to Master Security profiles.

The **Profile Values** tab is where the specific privileges are granted.

[Figure 9-21](#) shows the **Profile Values** tab of the **Security - Master Profiles** workspace.

Profile Name	Operator	Profile Values	Locations
☒ Security (view)		☒ Security (add, edit, delete)	☒ Circulation Policy Groups (view)
			☒ Circulation Policy Groups (add, edit, delete)
☐ Acq/Serials Policy Groups (view)			☐ Patron Groups (view)
☐ Acq/Serials Policy Groups (add, edit, delete)			☐ Patron Groups (add, edit, delete)
☐ Cataloging Policy Groups (view)			☒ Cluster View-Only
☐ Cataloging Policy Groups (add, edit, delete)			☐ Cluster Create
☐ System-Wide and OPAC Configuration (view)			☐ Cluster Edit
☐ System-Wide and OPAC Configuration (add, edit, delete)			☐ Cluster Delete
			☐ Media Policy Groups (view, add, edit, delete)

Figure 9-21. Security - Master Profiles Workspace, Profile Values Tab

[Table 9-6](#) provides the names, descriptions, if required, and the type and range requirements for the field on the **Profile Values** tab in the **Security - Master Profiles** workspace.

Table 9-6. Fields in the Profile Values Tab

Name	Description	Required	Type and Range
Security (view)	Operator(s) linked to this Master Security Profile can view the Security listbar.	No	Check box
Security (add, edit, delete)	Operator(s) linked to this Master Security Profile can access the Security listbar to: - Add, update, and delete Operator Profiles - Create Security Profiles for policy groups - Link or unlink Operator Profiles from the Security Profile for policy groups	No	Check box
System-Wide and OPAC Configuration (view)	Operator(s) linked to this Master Security Profile can view the System listbar.	No	Check box

Table 9-6. Fields in the Profile Values Tab

Name	Description	Required	Type and Range
System-Wide and OPAC Configuration (add, edit, delete)	Operator(s) linked to this Master Security Profile can access the: • System listbar to add, edit, or delete values entered in the System Configuration section of the System Administration module (see chapter 10) • OPAC Configuration listbar (see OPAC Configuration main window on page 7-3) to add/update the screens in the OPAC section of the System Administration module • Call Slips listbar (see Call Slips - No-Fill Reasons main dialog box on page 3-3) to add, edit, or delete values entered in the Call Slips section of the System Administration module • Search listbar (see Search Menu on page 8-2) to add, edit, or delete values entered in the Search section of the System Administration module You do not need to associate the profile with any Location.	No	Check box
Acq/Serials Policy Groups (view)	Operator(s) linked to this Master Security Profile can view the Acquisitions listbar (see Acquisitions listbar on page 2-2).	No	Check box

Table 9-6. Fields in the Profile Values Tab

Name	Description	Required	Type and Range
Acq/Serials Policy Groups (add, edit, delete)	Operator(s) linked to this Master Security Profile can access the Acquisitions listbar (see Acquisitions listbar on page 2-2) to: Add, create, and delete values entered in the Acquisitions/Serials Policy Group in the Administration module (If your site has more than one Acquisitions/Serials Policy Group, you also need to consider Locations.)	No	Check box
Cataloging Policy Groups (view)	Operator(s) linked to this Master Security Profile can view the Cataloging listbar (see Cataloging taskbar options on page 4-3).	No	Check box
Cataloging Policy Groups (add, edit, delete)	Operator(s) linked to this Master Security Profile can access the Cataloging listbar (see Cataloging taskbar options on page 4-3) to: Add, create, and delete values entered in the Cataloging Policy Group section of the System Administration module (If your site has more than one Cataloging Policy Group, you also need to consider Locations.)	No	Check box
Circulation Policy Groups (view)	Operator(s) linked to this Master Security Profile can view the Circulation listbar. (If your site has more than one Circulation Policy Group, you also need to consider Locations.) NOTE: The operator must also have cluster authorization.	No	Check box

Table 9-6. Fields in the Profile Values Tab

Name	Description	Required	Type and Range
Circulation Policy Groups (add, edit, delete)	Operator(s) linked to this Master Security Profile can access the Circulation listbar to: Add, create, and delete values entered in the Circulation Policy Group section of the System Administration module (If your site has more than one Circulation Policy Group, you also need to consider Locations.) NOTE: The operator must also have cluster authorization.	No	Check box
Cluster View-Only	Operator(s) linked to this Master Security Profile are allowed to: View Circulation Clusters in the database It enables the View button on the Circulation - Cluster Maintenance workspace, with the fields visible, but not editable. This ability is dependent upon the Circulation Cluster's associated locations being listed on the Security - Master Profiles > Locations tab and access to Circulation Policy Groups.	No	Check box
Cluster Create	Operator(s) linked to this Master Security Profile are allowed to: Create new Circulation Clusters to the database This ability is dependent upon the Circulation Cluster's associated locations being listed on the Security - Master Profiles > Locations tab and access to Circulation Policy Groups.	No	Check box In single cluster environments, this check box is inactive.

Table 9-6. Fields in the Profile Values Tab

Name	Description	Required	Type and Range
Cluster Edit	Operator(s) linked to this Master Security Profile are allowed to: Edit Circulation Clusters in the database This ability is dependent upon the Circulation Cluster's associated locations being listed on the Security - Master Profiles > Locations tab and access to Circulation Policy Groups.	No	Check box
Cluster Delete	Operator(s) linked to this Master Security Profile are allowed to: Delete Circulation Clusters in the database This ability is dependent upon the Circulation Cluster's associated locations being listed on the Security - Master Profiles > Locations tab and access to Circulation Policy Groups.	No	Check box In single cluster environments, this check box is inactive.
Patron Groups (view)	Operator(s) linked to this Master Security Profile are allowed to view Patron Groups. This option is only available when Circulation Policy Groups can be viewed or edited.	No	Check box
Patron Groups (add, edit, delete)	Operator(s) linked to this Master Security Profile are allowed to: - Add Patron Groups - Edit Patron Groups - Delete Patron Groups This option is only available when Circulation Policy Groups can be edited.	No	Check box

Table 9-6. Fields in the Profile Values Tab

Name	Description	Required	Type and Range
Media Policy Groups (view, add, edit, delete)	Operator(s) linked to this Master Security Profile are allowed to: View, create, edit, and delete Media Policy Groups in the Media System Administration module Does not provide access to the System Administration module, just Media System Administration.	No	Check box

**IMPORTANT:**

You must select at least one Profile Value for each Master Security Profile. Select one or more Profile Values depending upon what Operator Profiles you want to link to this Security Profile.

NOTE:

If you selected only System-Wide Configuration under Profile Values, leave the Locations as they are.

If you selected at least one or more of the Policy Group boxes (that is Acquisitions/Serials, Cataloging, Circulation, or Media) under Profile Values, if you have more than one Policy Group of that type, and if you want operators linked to this Master Security Profile to be able to deal with all Policy Groups of that type, the system automatically selects all Locations and you need not make any changes.

If you selected at least one or more of the Policy Group boxes under Profile Values, if you have more than one Policy Group of that type, and if you want operator(s) linked to this Master Security Profile to be able to deal with only one Policy Group of that type, you have to discard any Location that does not belong to that Policy Group. (If you do not know which Locations belong to what Policy Group of that type, you need to find that information in the relevant Policy Group section of the System Administration module.)

Creating a Master Security Profile

To create a Master Security Profile, the administrator must name it, associate operators with it, grant specific privileges, and associate locations with it.



Procedure 9-5. Creating a Master Security Profile

Use the following to create a Master Security Profile.

1. Access the **Security - Master Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Master Profiles** button in the Security listbar.

Result: The **Security - Master Profiles** workspace opens.

2. Click the **New** button to create a profile.

Result: The **Master Profile** section opens in the bottom half of the workspace (see [Figure 9-22](#)).

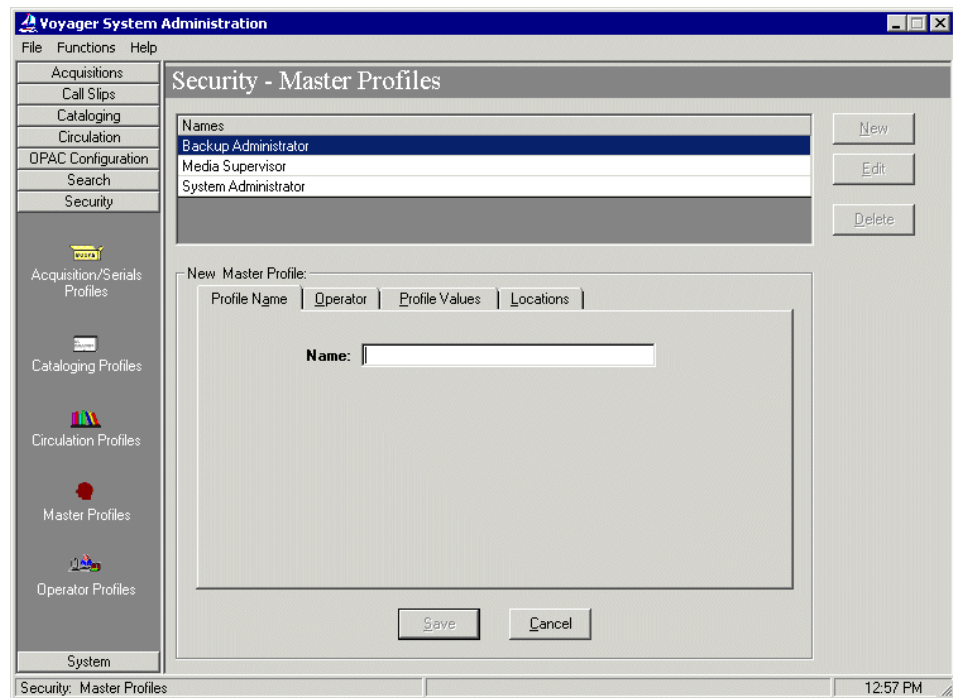


Figure 9-22. Security - Master Profiles Workspace

3. Enter a profile name in the **Profile Name** field.

Result: The profile is named (see [Figure 9-23](#)).

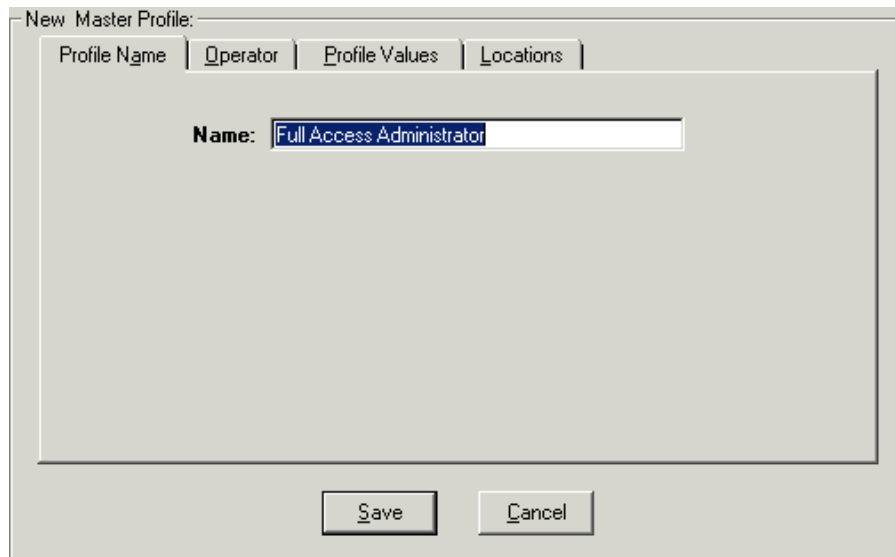


Figure 9-23. Profile Name Tab

4. Click the **Operator** tab. To link operators to this profile, perform the following:
 - a. Highlight one or more operators from the **Available Operators** list.
 - b. Click the > button.

NOTE:

To move all operators from the **Available Operators** list to the **Selected Operators** list, do not highlight them, simply click the >> button.

Result: The operators have moved from the **Available Operators** to the **Selected Operators** list and are now associated with the profile (see [Figure 9-24](#)).

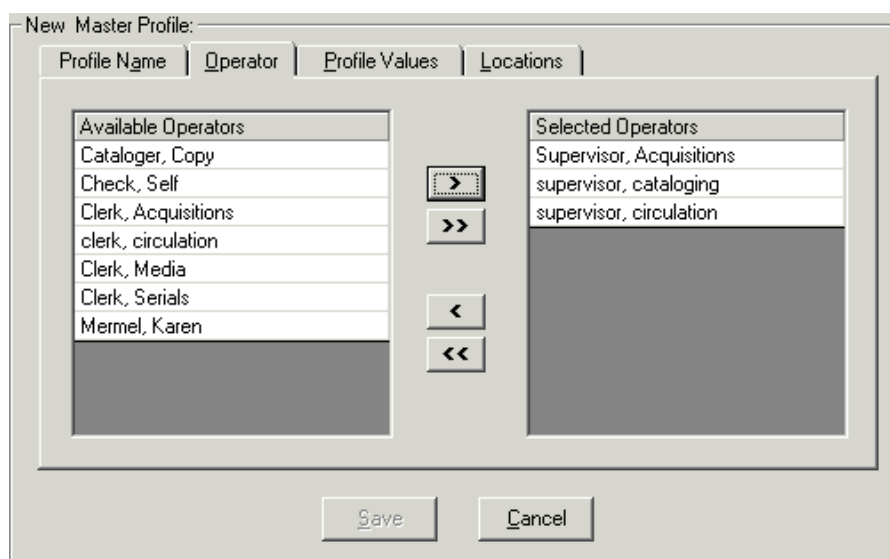


Figure 9-24. Operators Tab with Operators Associated with the Profile

5. Click the **Profile Values** tab. Check the appropriate check boxes to authorize operators.

Result: **Profile Values** are associated with this profile (see [Figure 9-25](#)).

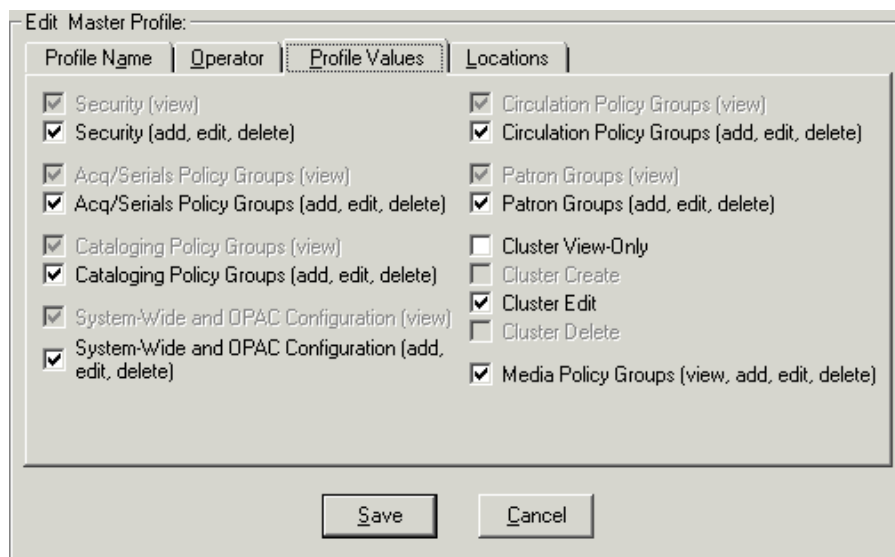


Figure 9-25. Profile Values Tab with Privileges Granted to Operators in the Profile

6. Click the **Locations** tab. To associate locations with this profile, perform the following:
 - a. Highlight one or more Locations from the **Available Locations** list.
 - b. Click the > button.

NOTE:

To move all locations from the **Available Locations** list to the **Selected Locations** list, do not highlight them, simply click the >> button.

Result: The locations have moved from the **Available Locations** to the **Selected Locations** list and are now associated with the profile (see [Figure 9-26](#)).

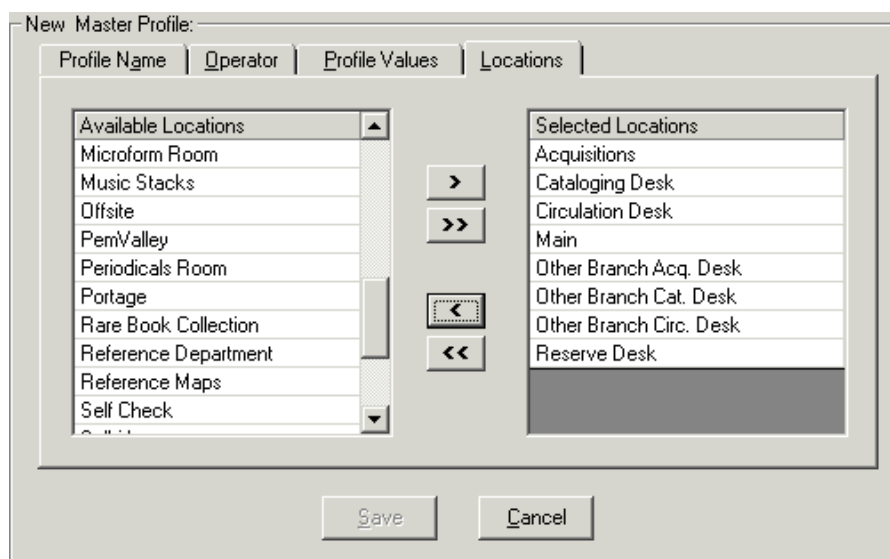


Figure 9-26. Locations Tab with Locations Associated with this Profile

7. Once all of the tabs have data, click the **Save** button if you want to save this newly-created master profile, or **Cancel** if you do not want to save it.

NOTE:

The **Save** button at the bottom of each of the tabs is active once a profile name is provided. Operators can click the **Save** button any time they want to save the profile information.

Result: If saved, the new Master Security Profile is listed in the **Security - Master Profiles** workspace (see [Figure 9-27](#)).

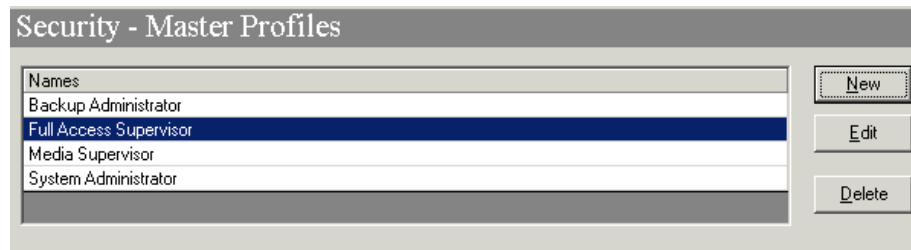


Figure 9-27. Newly-Created Master Security Profile Listed

Editing a Master Security Profile

You may change information at any time.



Procedure 9-6. Editing a Master Security Profile

Use the following to edit a Master Security Profile.

1. Access the System Administration module's **Security - Master Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Master Profiles** button in the Security listbar.

Result: The **Security - Master Profiles** workspace opens.

2. Highlight the Master Security Profile you want to edit and Click the **Edit** button.

Result: The **Edit Master Profile** section opens with the **Profile Name** tab available (see [Figure 9-28](#)).

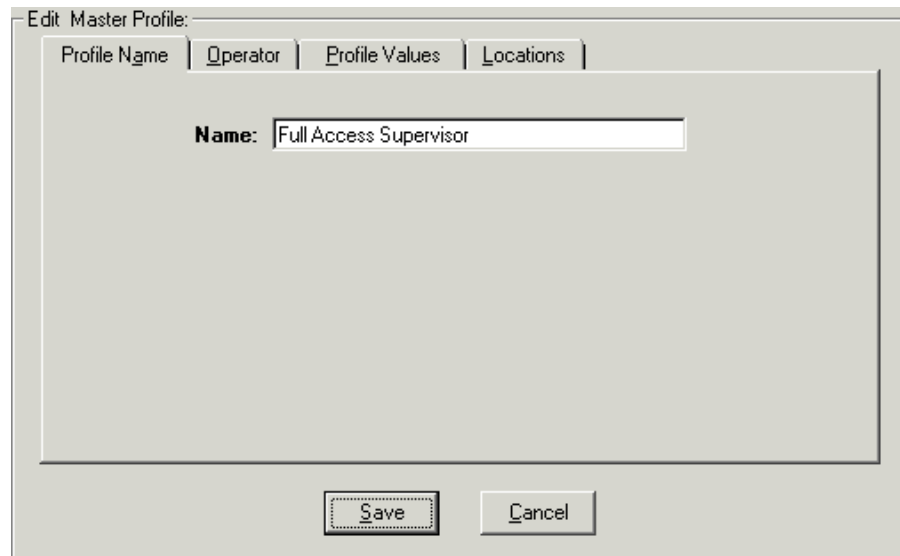


Figure 9-28. Edit Master Profile Section

3. Select the tab containing the information you want to edit and enter the changes.
4. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the Master Security Profile selected has been edited.

Deleting a Master Security Profile

You may delete any profile at any time, except the System Administration operator.



Procedure 9-7. Deleting a Master Security Profile

Use the following to delete a Master Security Profile.

1. Access the System Administration module's **Security - Master Profiles** workspace.
 - a. Click **Security** in the listbar.

- b. Click the **Master Profiles** button in the Security listbar.

Result: The **Security - Master Profiles** workspace opens.

2. Highlight the profile you want to delete (see [Figure 9-29](#)).

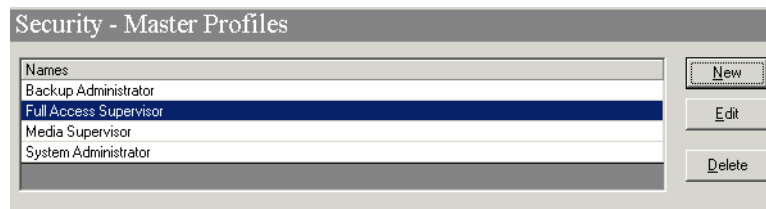


Figure 9-29. Security - Master Profile Workspace with Profile Highlighted

3. Click the **Delete** button.

Result: A message asking for confirmation of the deletion displays (see [Figure 9-30](#)).



Figure 9-30. Confirmation Message before Deleting the Profile

4. Click the **Yes** button if you do want to delete this Profile.

Result: The profile is deleted, and no longer displays in **Security - Master Profile** workspace.

Acquisition/Serials Profiles - Creating, Editing, and Deleting

Acquisition/Serials Security Profiles control what functions an operator can perform in the Acquisitions module.

Each staff person working in an order or receiving department who performs tasks using Voyager needs an Operator Profile linked to one Acquisitions/Serials Security Profile. Depending upon how work is performed in your library, a staff person's Operator Profile may also need to be linked to a Master Security Profile, a Cataloging Security Profile, and/or a Circulation Security Profile.

The **Security - Acquisition/Serials Profiles** workspace displays in [Figure 9-31](#). It contains the tabs: **Profile Name**, **Operator**, **Profile Values (two tabs)**, **Locations**.

Figure 9-31. Security - Acquisition/Serials Workspace

The **Profile Name**, **Operator**, and **Locations** tabs are common elements and discussed in section [Common Elements in all Security Profiles](#) on [page 9-4](#).

Profile Values Tabs

This section discusses the **Profile Values** tabs that are specific to Acquisition/Serials profiles.

The **Profile Values** tabs are where specific privileges are granted such that operators linked to the profile can perform the activities.

You must select at least one Profile Value for each Acquisition/Serials Security Profile.

Select one or more Profile Values depending upon what Operator Profiles you want to link to this Security Profile. For example, if it is to give an operator(s) the ability to add/update purchase orders, select the box Add/Update Purchase Orders. Select all boxes if the operator(s) linked to this profile can perform all the functions.

Review each Profile Value carefully to make sure the Security Profile as a whole includes a logical combination. For example, does a profile intended for use by serial check-in clerks need to include authorization to allow them to View other records?

The Profile Value information is split on to two **Profile Values** tabs, the **Profile Values** tab, and the **Profile Values Cont.[inued]** tab. [Figure 9-32](#) and [Figure 9-33](#) show the **Profile Values** tabs.

Edit Acquisition/Serials Profile:

Profile Name	Operator	Profile Values	Profile Values Cont.	Locations
☒ Add/Update Purchase Orders	☒ Add/Update Item	☒ Add/Update Vendor		
☐ Receive				
☒ Delete Purchase Orders	☒ Delete Item	☒ Delete Vendors		
☐ View-Only Purchase Orders	☐ View-Only Item	☐ View-Only Vendors		
☒ Approve Purchase Orders				
☒ Serials Check-In	☒ Process Claims from Acquisitions			
☐ View-Only Serials Check-In	☒ Process Claims from Serials Control			
☐ Delete Serials Components	☐ View-Only Problems and Claims Lists			
☒ Add/Update Serial Patterns	☐ Change Line Item Bib Record			
☐ View-Only Serial Patterns				
☒ Delete Serial Patterns	☒ Attach Holding to any Bibliographic Record			

Figure 9-32. Profile Values Tab

Edit Acquisition/Serials Profile:

Profile Name | Operator | Profile Values | **Profile Values Cont.** | Locations

☒ Add Update Ledger and Funds
☐ View-Only Ledgers and Funds
☒ Delete Ledgers and Funds
☒ Change Fund Allocations
☐ Fiscal Close Operations
☐ Currency Maintenance
☒ EDI Incoming
☒ EDI Outgoing
☒ Modify EDI Outgoing Messages

☒ Add/Update Invoices
☐ View-Only Invoices
☒ Delete Invoices
☒ Approve Invoices
☒ Bindery-View Volume And Issue
☐ Bindery-Edit Volume Level Data
☐ Bindery-Edit issue sequence for volumes
☐ Bindery Print
☒ Override Overexpend Warning
☒ Override Overcommit Warning

Save Cancel

Figure 9-33. Profile Values Continued Tab

[Table 9-7](#) and [Table 9-8](#) describe the check boxes found on the **Profile Values** tabs of the **Security - Acquisition/Serials Profiles** workspace.

Table 9-7. Profile Values tab

Option Name	Description	Type and Range
Add/Update Purchase Orders	When checked, acquisitions operators linked to this profile may create and edit purchase orders. Add/Update automatically includes the ability to search and display the record. Also, operators may receive non-serial items and add/update item records.	Check box The default is checked.
Receive	When checked, acquisitions operators linked to this profile may only receive items.	Check box The default is checked and inactive.

Table 9-7. Profile Values tab

Option Name	Description	Type and Range
Delete Purchase Orders	When checked, acquisitions operators linked to this profile may delete purchase orders.	Check box The default is checked.
View-Only Purchase Orders	When checked, acquisitions operators linked to this profile may only view purchase orders.	Check box The default is not checked and inactive.
Approve Purchase Orders	When checked, acquisitions operators linked to this profile may approve purchase orders. This confers the ability to commit money from funds, authorizes printing/transmission of a purchase order, and also enables the operator to complete purchase orders. Also, operators can create and update bibliographic, holdings, and item records.	Check box The default is checked.
Serials Check-in	When checked, acquisitions operators linked to this profile may check-in serial issues. This also gives operators the ability to edit serials records.	Check box The default is checked.
View-Only Serials Check-In	When checked, acquisitions operators linked to this profile have view-only privileges for Serials Check-In. If the View-Only Serials Check-In check box is selected, operators can view Serials Check-In information, Subscription Maintenance information, and Serials History information, but they cannot perform any functions.  TIP: <i>This option makes it possible to extend viewing privileges to Reference and other staff that often need access to this data to assist patrons.</i>	Check box The default is not checked and inactive.

Table 9-7. Profile Values tab

Option Name	Description	Type and Range
Delete Serials Components	When checked, acquisitions operators linked to this profile may delete serials components on the Components Details tab for a specific subscription in Check-In > Subscription Maintenance. NOTE: The Delete button on the Components Details tab does not display unless this security option is selected.	Check box. The default is not checked.
Add/Update Serial Patterns	When checked, acquisitions operators linked to this profile may create and edit serial patterns.	Check box The default is checked.
View-Only Serial Patterns	When checked, acquisitions operators linked to this profile may only view serial patterns.	Check box The default is not checked and inactive.
Delete Serial Patterns	When checked, acquisitions operators linked to this profile may delete serial patterns.	Check box The default is not checked.
Add/Update Item	When checked, acquisitions operators linked to this profile may create and edit item records. Add/Update automatically includes the ability to search and display the record.	Check box The default is not checked.
Delete Item	When checked, acquisitions operators linked to this profile may delete items.	Check box. The default is not checked and inactive.
View-Only Item	When checked, acquisitions operators linked to this profile may only view items.	Check box The default is checked and not active.

Table 9-7. Profile Values tab

Option Name	Description	Type and Range
Process Claims from Acquisitions	When checked, acquisitions operators linked to this profile may process marked and claimed line item copies from the following places in the Acquisitions module: the Marked Line Items tab of the Problems screen, the Claimed Line Items tab of the Claims screen, the Problems tab of a line item, the Claims tab of a line item, an approved purchase order, and an approved invoice.	Check box The default is checked.
Process Claims from Serials Control	When checked, acquisitions operators linked to this profile may process marked and claimed serial issues from the following places in the Acquisitions module: the Marked Issues tab of the Problems screen, the Claimed Issues tab of the Claims screen, the Problem History tab of the Serials History activity, the Claims History tab of the Serials History activity, an approved purchase order, and an approved invoice.	Check box The default is checked.

Table 9-7. Profile Values tab

Option Name	Description	Type and Range
View-Only Problems and Claims Lists	When checked, acquisitions operators linked to this profile may only view the Problems and Claims lists. In addition, operators have the ability to view information from all of the locations mentioned above, but restricts all processing of marks and claims from those locations.  TIP: <i>This view-only option makes it possible to extend viewing privileges to Reference and other staff that often need access to this data to assist patrons.</i>	Check box The default is not checked and inactive.
Change Line Item Bib Record	When checked, acquisitions operators linked to this profile may do the following. • Change the bibliographic record on an approved line item. • Link approved line item copies to different holdings records.	Check box The default is not checked.
Attach Holding to any Bibliographic Record	When checked, if the operators profiles cross owning libraries, then the acquisitions operators linked to this profile may create a new bibliographic record and assign it a holdings from another location. If it is unchecked, and the operator is linking a bibliographic record to a purchase order, the order location is checked against the bibliographic record's owning library. If the IDs do not match, a message displays explaining that the bibliographic record could not be linked because it does not belong to the operator location	Check box The default is checked.

Table 9-7. Profile Values tab

Option Name	Description	Type and Range
Add/Update Vendor	When checked, acquisitions operators linked to this profile may create and edit vendor records. Add/Update automatically includes the ability to search and display the record. If both Add/Update Vendors and View-Only Vendors are unchecked, the operators linked to this profile are not able to search for vendor records.	Check box The default is checked.
Delete Vendors	When checked, acquisitions operators linked to this profile may delete vendor records.	Check box The default is checked.
View-Only Vendors	When checked, acquisitions operators linked to this profile may only view vendor records.	Check box The default is not checked and inactive.

Table 9-8. Profile Values Cont. tab

Option Name	Description	Type and Range
Add/Update Ledgers and Funds	When checked, acquisitions operators linked to this profile may add and update ledgers and funds.	Check box The default is checked.
View-Only Ledgers and Funds	When checked, acquisitions operators linked to this profile may only view ledger and fund information.	Check box The default is not checked and inactive.
Delete Ledgers and Funds	When checked, acquisitions operators linked to this profile may delete ledgers and funds.	Check box The default is checked.
Change Fund Allocations	When checked, acquisitions operators linked to this profile may change fund allocations.	Check box The default is checked.

Table 9-8. Profile Values Cont. tab

Option Name	Description	Type and Range
Fiscal Close Operations	When checked, acquisitions operators linked to this profile may create rules for closing funds at the end of the fiscal period.	Check box The default is checked.
Currency Maintenance	When checked, acquisitions operators linked to this profile may change the conversion rates for foreign currencies.	Check box The default is not checked.
EDI Incoming	When checked, acquisitions operators linked to this profile may search and load incoming EDI messages and EDI connection profiles. If the EDI Incoming check box is not checked, the Incoming tab of the EDI activity will not be available.	Check box The default is not checked.
EDI Outgoing	When checked, acquisitions operators linked to this profile may create and send outgoing EDI messages and EDI connection profiles. The ability to send outgoing EDI messages is also allowed. If the EDI Outgoing check box is not checked, the Outgoing tab of the EDI activity will not be available.	Check box The default is not checked.
Modify EDI Outgoing Messages	When checked, acquisitions operators linked to this profile may select messages that have different Vendors or Sender Codes and send them to a file.	Check box The default is not checked.
Add/Update Invoices	When checked, acquisitions operators linked to this profile may add and update invoices.	Check box The default is checked.
View-Only Invoices	When checked, acquisitions operators linked to this profile may only view invoice information.	Check box The default is not checked and inactive.
Delete Invoices	When checked, acquisitions operators linked to this profile may delete invoices.	Check box The default is checked.

Table 9-8. Profile Values Cont. tab

Option Name	Description	Type and Range
Approve Invoices	When checked, acquisitions operators linked to this profile may approve invoices, expending money from funds authorizing payment to the vendor. They also can complete invoices.	Check box The default is checked.
Bindery-View Volume And Issue	When checked, acquisitions operators linked to this profile may only view volume and issue information from the Bindery Maintenance workspace.	Check box The default is checked.
Bindery-Edit Volume Level Data	When checked, acquisitions operators linked to this profile may create new volumes, edit existing volumes, and save any volume information (for example, enumeration or chronology) displayed in the Bindery Maintenance workspace. In addition, the operator can create item records and collapse issues for a volume. Not available unless the Bindery - View Volume and Issue check box is checked.	Check box The default is checked.
Bindery-Edit Issue sequence for volumes	When checked, acquisitions operators linked to this profile may bind or unbind individual issues and to reorder the sequence of issues contained within a volume. Not available unless the Bindery - View Volume and Issue check box is checked.	Check box The default is checked.
Bindery Print	When checked, acquisitions operators linked to this profile may print bindery notes and pull slips from the Bindery Maintenance workspace. Not available unless the Bindery - View Volume and Issue check box is checked.	Check box The default is checked.

Table 9-8. Profile Values Cont. tab

Option Name	Description	Type and Range
Override Overexpend Warning	When checked, acquisitions operators linked to this profile may override an online warning when using a fund (in either a purchase order or an invoice) where continuing action will put it over the limit. (Default overcommit and overexpend values are defined for each Fund Type. See Fund Types on page 2-20).	Check box The default is checked.
Override Overcommit Warning	When checked, acquisitions operators linked to this profile may override an online warning when using a fund (in either a purchase order or an invoice) where continuing action will put it over the limit. (Default overcommit and overexpend values are defined for each Fund Type. See Fund Types on page 2-20).	Check box The default is checked.

Creating an Acquisition/Serials Profile

Before you can create a new Acquisition/Serials profile, the following must be completed:

- Operators must be defined. See [Operator Profiles Workspace](#) on [page 9-15](#).
- Locations must be defined. See [Locations](#) on [page 10-39](#).



Procedure 9-8. Creating an Acquisition/Serials Profile

Use the following to create a Acquisition/Serials Profile.

1. Access the **Security - Acquisition/Serials Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Acquisition/Serials Profiles** button in the Security listbar.

Result: The **Security - Acquisition/Serials Profiles** workspace opens.

2. Click the **New** button to create a profile.

The bottom half of the workspace opens to the **New Acquisition/Serials Profile** section, **Profile Name** tab (see [Figure 9-34](#)).



Figure 9-34. Acquisition/Serials Workspace, Profile name Tab

3. Enter the profile name in the **Profile Name** field.

NOTE:

Once a Profile Name is provided, the **Save** button becomes active. At any point, the operator may click the **Save** button to save the profile or click the **Cancel** button if they do not want to save the profile. If saved, the bottom half of the workspace changes from **New Acquisition/Serials Profile** to **Edit Acquisition/Serials Profile**.

4. Click the **Operator** tab to select the operators you want to link to this profile.
 - a. Highlight one or more operators from the **Available Operators** list.
 - b. Click the **>** button.

NOTE:

To move all operators from the **Available Operators** list to the **Selected Operators** list, do not highlight them, simply click the **>>** button.

Result: The operators have moved from the **Available Operators** to the **Selected Operators** list and are now associated with the profile.

5. Click the **Profile Values** tab. Check the appropriate check boxes to allow operators in this profile the ability to perform the action listed.

Result: Specific abilities are associated with this profile (see [Figure 9-35](#)).

The screenshot shows the 'New Acquisition/Serials Profile' dialog box with the 'Profile Values' tab selected. The dialog has five tabs: 'Profile Name', 'Operator', 'Profile Values', 'Profile Values Cont.', and 'Locations'. The 'Profile Values' tab contains a list of checkboxes for various actions. The following table summarizes the checked and unchecked options:

Action	Checked
Add/Update Purchase Orders	Yes
Receive	Yes
Delete Purchase Orders	No
View-Only Purchase Orders	No
Approve Purchase Orders	No
Serials Check-In	Yes
View-Only Serials Check-In	No
Add/Update Serial Patterns	Yes
View-Only Serial Patterns	No
Delete Serial Patterns	No
Add/Update Item	Yes
Delete Item	No
View-Only Item	No
Add/Update Vendor	No
Delete Vendors	No
View-Only Vendors	Yes
Process Claims from Acquisitions	Yes
Process Claims from Serials Control	Yes
View-Only Problems and Claims Lists	No
Attach Holding to any Bibliographic Record	Yes

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Figure 9-35. Completed Profile Values Tab

6. Click the **Profile Values Cont.** tab. Check the appropriate check boxes to allow operators in this profile the ability to perform the action listed.

Result: Specific abilities are associated with this profile (see [Figure 9-36](#)).

The screenshot shows the 'New Acquisition/Serials Profile' dialog box with the 'Profile Values Cont.' tab selected. The dialog has five tabs: 'Profile Name', 'Operator', 'Profile Values', 'Profile Values Cont.', and 'Locations'. The 'Profile Values Cont.' tab contains a list of checkboxes for various actions. The following table summarizes the checked and unchecked options:

Action	Checked
Add/Update Ledger and Funds	No
View-Only Ledgers and Funds	Yes
Delete Ledgers and Funds	No
Change Fund Allocations	No
Fiscal Close Operations	No
Currency Maintenance	No
EDI Incoming	No
EDI Outgoing	No
Modify EDI Outgoing Messages	No
Add/Update Invoices	Yes
View-Only Invoices	No
Delete Invoices	No
Approve Invoices	No
Bindery-View Volume And Issue	Yes
Bindery-Edit Volume Level Data	No
Bindery-Edit issue sequence for volumes	No
Bindery Print	Yes
Override Overexpend Warning	No
Override Overcommit Warning	No

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Figure 9-36. Completed Profile Values Cont. Tab

7. Click the **Locations** tab to select the locations you want to link to this profile.
 - a. Highlight one or more Locations from the **Available Locations** list.
 - b. Click the > button.

NOTE:

To move all locations from the **Available Locations** list to the **Selected Locations** list, do not highlight them, simply click the >> button.

Result: The locations have moved from the **Available Locations** to the **Selected Locations** list and are now associated with the profile.

8. After entering information on each of the tabs in the **Acquisition/Serials Profiles** workspace, click the **Save** button to save the newly-created profile or click the **Cancel** button if you do not want to save the profile.

Result: The name of the new profile is listed in the **Security - Acquisition/Serials Profiles** list (see [Figure 9-37](#)).

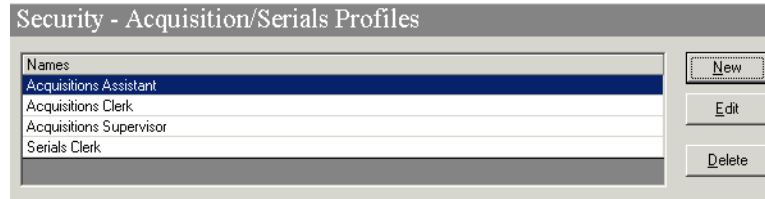


Figure 9-37. New Acquisition/Serials Profile in List of Profiles

Editing Acquisition/Serials Profiles

You may change any information at any time.



Procedure 9-9. Editing an Acquisition/Serials Profiles

Use the following to edit an Acquisition/Serials Profile.

1. Access the **Security - Acquisition/Serials Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Acquisition/Serials Profiles** button in the Security listbar.

Result: The **Security - Acquisition/Serials Profiles** workspace opens.

2. Highlight the Acquisition/Serials Profile you want to edit and click the **Edit** button.

The **Edit Acquisition/Serials Profile** section opens with the **Profile Name** tab available.

3. Select the tab(s) containing the information you want to edit and enter the changes.
4. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the Acquisition/Serials Profile selected has been edited.

Deleting an Acquisition/Serials Profile

You may delete an Acquisition/Serials Profile at any time.



Procedure 9-10. Deleting an Acquisition/Serials Profile

Use the following to delete a Acquisition/Serials Profile.

1. Access the **Security - Acquisition/Serials Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Acquisition/Serials Profiles** button in the Security listbar.

Result: The **Security - Acquisition/Serials Profiles** workspace opens.

2. Highlight the profile you want to delete and click the **Delete** button.

Result: A message asking for confirmation of the deletion displays (see [Figure 9-38](#)).

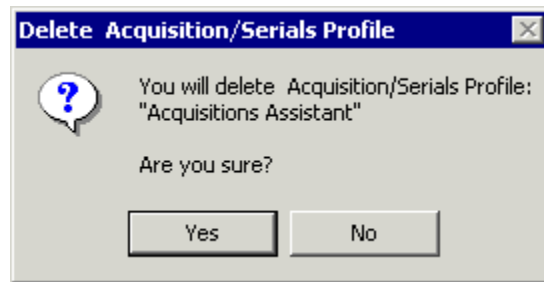


Figure 9-38. Confirmation Message before Deleting the Profile

3. Click the **Yes** button if you do want to delete this profile.

Result: The Acquisition/Serials profile is deleted, and no longer displays in **Security - Acquisition/Serials Profiles** workspace.

Cataloging Profiles - Creating, Editing, and Deleting

Cataloging Security Profiles control what functions an operator can perform in the Cataloging module.

Each staff person working in a cataloging department who performs tasks using Voyager will need an Operator Profile linked to one Cataloging Security Profile. Depending upon how work is performed in your library, a staff person's Operator Profile may also need to be linked to a Master Security Profile, an Acquisitions/Serials Security Profile, and/or a Circulation Security Profile.

The **Security - Cataloging Profiles** workspace displays (see [Figure 9-39](#)). It contains the tabs, **Profile Name**, **Operator**, **Profile Values** (two tabs) and **Locations**.

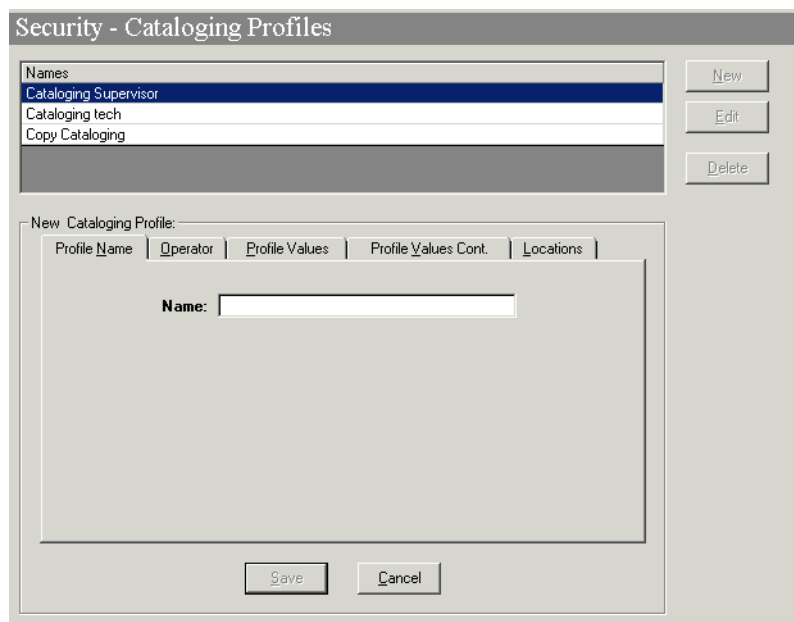


Figure 9-39. Security Cataloging Profiles Workspace

The **Profile Name**, **Operator**, and **Locations** tabs are common elements and discussed in section [Common Elements in all Security Profiles](#) on [page 9-4](#).

Profile Values Tabs

This section discusses the additional Cataloging specific tabs.

The **Profile Values** tabs are where specific privileges are granted such that operators linked to the profile can perform the activities.

You must select at least one Profile Value for each Cataloging Security Profile. Profile Values for the record types include authorization to search for and display records from the database.

Select one or more Profile Values depending upon what Operator Profiles you want to link to this Security Profile. For example, if it is to give an operator(s) the ability to add holdings records, check the **Add Holdings Records** check box. Check all check boxes if the operator(s) linked to this profile can perform all the functions.

Be aware that functions for holdings records can be restricted by Location(s) so that, for example, an operator can only **Add Holdings Records** for items destined for specific Locations selected.

Templated input is a feature for use with Citation Server. If you are setting Cataloging security for a Citation Server database, the **Use Templated Forms** check box is available. When you select the **Use Templated Forms** Profile Value, the operator(s) linked to this profile are able to input bibliographic/citation data using a simple Windows form. The **Add**, **Delete**, and **Update Bibliographic Records** check boxes are automatically selected with the **Use Templated Forms** check box.

Review this carefully to make sure the Security Profile as a whole includes a logical combination.

The Profile Value information is split on to two **Profile Values** tabs: the **Profile Values** tab, and the **Profile Values Cont.[inued]** tab. [Figure 9-40](#) and [Figure 9-41](#) show the **Profile Value** tabs.

Edit Cataloging Profile:

Profile Name | Operator | **Profile Values** | Profile Values Cont. | Locations

☐ Use Templated Forms

Bibliographic Record

☒ Add ☒ Update
☒ Delete ☒ View
☒ Export OK ☐ Overlay

Holding Record

☒ Add ☒ Update
☒ Delete ☒ View
☒ Export OK

Item Record

☒ Add ☒ Update
☒ Delete ☒ View

Authority Record

☒ Add ☒ Update
☒ Delete ☒ View
☒ Export OK

Figure 9-40. Profile Values Tab

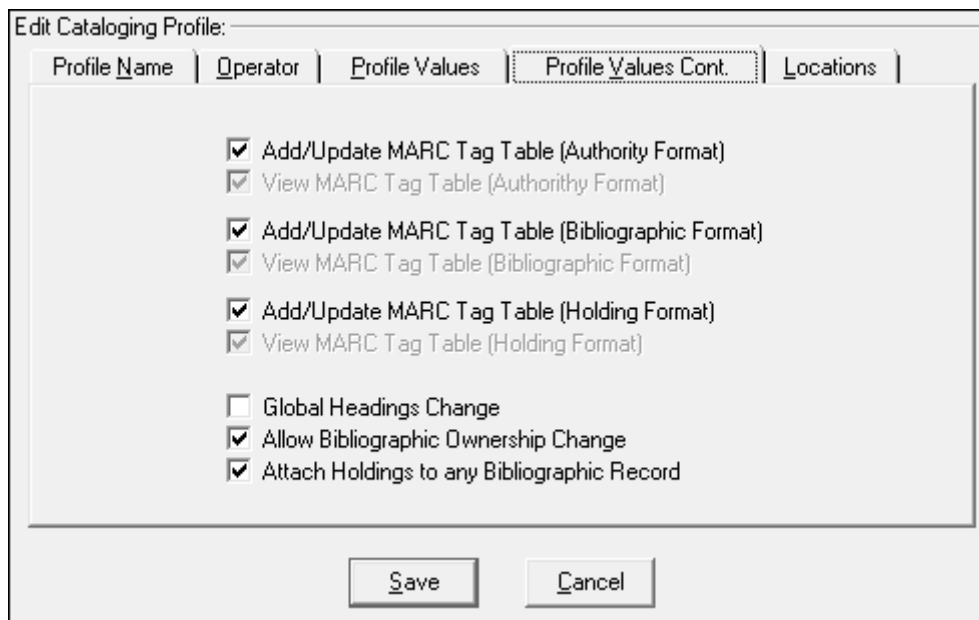


Figure 9-41. Profile Values Cont. Tab

[Table 9-9](#) describes the fields found on the **Profiles** tab of the **Security - Cataloging Profiles** workspace.

Table 9-9. Profile Values tabs

Option Name	Description	Required	Type and Range
Bibliographic Record section: Add	When checked, cataloging operators linked to this profile may create and save bibliographic records. Add automatically includes the ability to search and display the record.	No	Check box The default is checked. Click to clear.

Table 9-9. Profile Values tabs

Option Name	Description	Required	Type and Range
Bibliographic Record section: Delete	When checked, cataloging operators linked to this profile may delete bibliographic records. Delete automatically includes the ability to search and display the record.	No	Check box The default is checked. Click to clear.
Bibliographic Record section: OK to Export	When checked, this enables the OK to export check box on the System tab of a record in the Cataloging module. Through this check box, records can be marked for export. If it is not checked on the Profile Values tab, the OK to export check box is unavailable in the Cataloging module.	No	Check box The default is checked. Click to clear.
Bibliographic Record section: Update	When checked, cataloging operators linked to this profile may edit and save bibliographic records. Update automatically includes the ability to search and display the record. This option must be selected to allow for the bibliographic suppress flag function in Cataloging. See the Pick and Scan chapter in the <i>Cataloging User's Guide</i> for more information.	No	Check box The default is checked. Click to clear.

Table 9-9. Profile Values tabs

Option Name	Description	Required	Type and Range
Bibliographic Record section: View	When checked, cataloging operators linked to this profile may only search the database and display bibliographic records. Any operator with View authorization only cannot add, update, or delete the record type to or from the database. NOTE: Be aware that an operator authorized only to add, update, or delete holdings records can search only by the system-assigned record number since the holdings records contain no headings. Therefore, such an operator should also be authorized for View for bibliographic records in order to be able to search and display bibliographic records for which the operator can then display linked holdings records. Be aware that an operator authorized only to add, update, or delete authority records should also have at least View authorization for bibliographic records. If not, the operator is not able to utilize some search types.	No	Check box

Table 9-9. Profile Values tabs

Option Name	Description	Required	Type and Range
Bibliographic Record section: Overlay	The purpose of this option is to restrict who can use the bibliographic overlay functionality in cataloging. When checked, cataloging operators linked to this profile may overlay/merge bibliographic records.	No	Check box
Holding Record section: Add	When checked, cataloging operators linked to this profile may create holding records. Add automatically includes the ability to search and display the record.	No	Check box The default is checked. Click to clear.
Holding Record section: Delete	When checked, cataloging operators linked to this profile may delete holding records. Delete automatically includes the ability to search and display the record.	No	Check box The default is checked. Click to clear.
Holding Record section: OK to Export	When checked, this enables the OK to export check box on the System tab of a record in the Cataloging module. Through this check box, records can be marked for export. If it is not checked on the Profile Values tab, the OK to export check box is unavailable in the Cataloging module.	No	Check box The default is checked. Click to clear.

Table 9-9. Profile Values tabs

Option Name	Description	Required	Type and Range
Holding Record section: Update	When checked, cataloging operators linked to this profile may edit holding records. Update automatically includes the ability to search and display the record. This option must be selected to allow for the MFHD suppress flag function in Cataloging. See the Pick and Scan chapter in the <i>Cataloging User's Guide</i> for more information.	No	Check box The default is checked. Click to clear.
Holding Record section: View	When checked, cataloging operators linked to this profile may only search the database and display holding records. Any operator with View authorization only cannot add, update, or delete the record type to or from the database.	No	Check box The default is unchecked.
Item Record section: Add	When checked, cataloging operators linked to this profile may create item records. Add automatically includes the ability to search and display the record. An operator must be able to add Holdings records in order to be allowed to add Item records.	No	Check box The default is unchecked.

Table 9-9. Profile Values tabs

Option Name	Description	Required	Type and Range
Item Record section: Delete	When checked, cataloging operators linked to this profile may delete item records. An operator must be able to delete Holdings records in order to be allowed to delete Item records. Delete automatically includes the ability to search and display the record.	No	Check box The default is unchecked.
Item Record section: Update	When checked, cataloging operators linked to this profile may edit item records. Update automatically includes the ability to search and display the record. An operator must be able to update Holdings records in order to be allowed to update Item records.	No	Check box The default is unchecked.
Item Record section: View	When checked, cataloging operators linked to this profile may only search the database and display item records. Any operator with View authorization only cannot add, update, or delete the record type(s) to or from the database.	No	Check box The default is checked.

Table 9-9. Profile Values tabs

Option Name	Description	Required	Type and Range
Authority Record section: Add	When checked, cataloging operators linked to this profile may create and save authority records. Add automatically includes the ability to search and display the record.	No	Check box The default is checked. Click to clear.
Authority Record section: Delete	When checked, cataloging operators linked to this profile may delete authority records. Delete automatically includes the ability to search and display the record.	No	Check box The default is checked. Click to clear.
Authority Record section: OK to Export	When checked, this enables the OK to export check box on the System tab of a record in the Cataloging module. Through this check box, records can be marked for export. If it is not checked on the Profile Values tab, the OK to export check box is unavailable in the Cataloging module.	No	Check box The default is checked. Click to clear.
Authority Record section: Update	When checked, cataloging operators linked to this profile may edit and save authority records. Update automatically includes the ability to search and display the record.	No	Check box The default is checked. Click to clear.

Table 9-9. Profile Values tabs

Option Name	Description	Required	Type and Range
Authority Record section: View	When checked, cataloging operators linked to this profile may only search the database and display authority records. Any operator with View authorization only cannot add, update, or delete the record type(s) to or from the database.	No	Check box The default is unchecked.
Add/Update MARC Tag Table (Authority Format)	This feature is not enabled.	No	Check box The default is checked.
View MARC Tag Table (Authority Format)	This feature is not enabled.	No	Check box The default is unchecked.
Add/Update MARC Tag Table (Bibliographic Format)	This feature is not enabled.	No	Check box The default is checked.
View MARC Tag Table (Bibliographic Format)	This feature is not enabled.	No	Check box The default is unchecked.
Add/Update MARC Tag Table (Holdings Format)	This feature is not enabled.	No	Check box The default is checked.
View MARC Tag Table (Holdings Format)	This feature is not enabled.	No	Check box The default is unchecked.
Global Headings Change	When checked, operators linked to this profile have the ability to execute change/replacement of specified headings in all bibliographic records in your Voyager database. Global Headings Change in the File menu is active.	No	Check box The default is checked.

Table 9-9. Profile Values tabs

Option Name	Description	Required	Type and Range
Allow Bibliographic Ownership Change	When checked, operators linked to this profile have the ability to change the owning library if your site uses owning libraries. This option must be selected to allow for the bibliographic suppress flag function in Cataloging. See the Pick and Scan chapter in the <i>Cataloging User's Guide</i> for more information.	No	Check box The default is checked.

Table 9-9. Profile Values tabs

Option Name	Description	Required	Type and Range
Attach Holdings to any Bibliographic Record	When checked, the operator is restricted by the operator profile but not restricted by location. If the Cataloging profile indicates that the operator may not Attach Holdings in Any Bibliographic Record, the security is more restrictive. The security allows holdings to be added to a bibliographic record if that holdings location belongs to the owning library of that bibliographic record. In addition, all other location security rules apply. When the holdings record is saved, the location is checked against the lists of locations in the owning library (Locations tab in the Cataloging Profile Definition dialog box). If the holdings location is not in the bibliographic record's list of owning libraries, a message displays informing you that the holdings record cannot be saved because its location is not in the owning library of the bibliographic record.	No	Check box The default is checked.

Work Folders

If you want to permit an operator to have access to the cataloging module solely for the purpose of creating records for a work folder, clear all check boxes. Otherwise, at login, the system finds no Cataloging Security Profile for the

operator and denies any access to the module. More typically, operators restricted to creating records only for a work folder have some level of View authorizations so that they may, at least, search the database.

None of the security apparatus for cataloging functions affects the ability to deal with records in a work folder. Since work folders reside on network or individual workstation drives (not in the Voyager database), access to them depends on your local policies. Anyone who can access the Cataloging module at any level of authorization can work with records in a work folder.

Creating a Cataloging Profile

Before you can create a new Cataloging profile, the following must be completed:

- Operators must be defined. See [Operator Profiles Workspace](#) on [page 9-15](#).
- Locations must be defined. See [Locations](#) on [page 10-39](#).



Procedure 9-11. Creating an Cataloging Profile

Perform the following steps to create a Cataloging Profile:

1. Access the **Security - Cataloging Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Cataloging Profiles** button in the Security listbar.

Result: The **Security - Cataloging Profiles** workspace opens.

2. Click the **New** button to create a profile.

The bottom half of the workspace opens to the **New Cataloging Profile** section, **Profile Name** tab (see [Figure 9-42](#)).

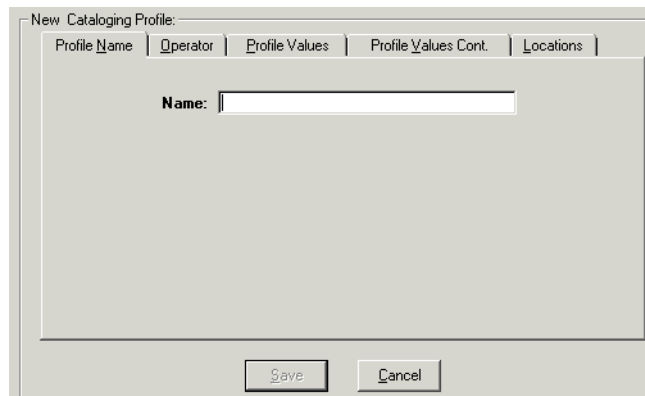


Figure 9-42. Cataloging Workspace, Profile Name Tab

3. Enter the profile name in the **Profile Name** field.

NOTE:

Once a Profile Name is provided, the **Save** button becomes active. At any point, the operator may click the **Save** button to save the profile or click the **Cancel** button if they do not want to save the profile. If saved, the bottom half of the workspace changes from **New Cataloging Profile** to **Edit Cataloging Profile**.

4. Click the **Operator** tab to select the operators you want to link to this profile.
 - a. Highlight one or more operators from the **Available Operators** list.
 - b. Click the > button.

NOTE:

To move all operators from the **Available Operators** list to the **Selected Operators** list, do not highlight them, simply click the >> button.

Result: The operators have moved from the **Available Operators** to the **Selected Operators** list and are now associated with the profile.

5. Click the **Profile Values** tab. Check the appropriate check boxes to allow operators in this profile the ability to perform the action listed.

Result: Specific abilities are associated with this profile (see [Figure 9-43](#)).

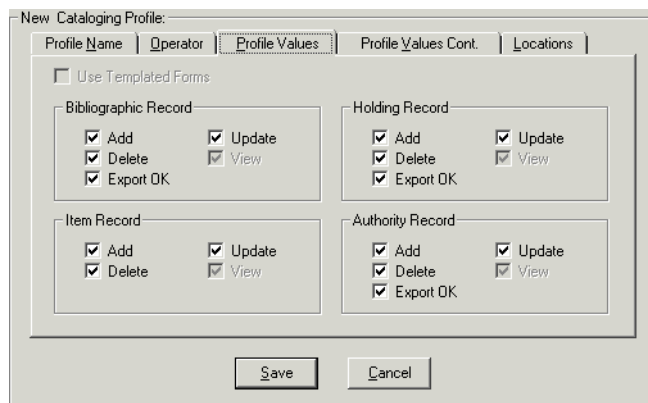


Figure 9-43. Completed Profile Values Tab

6. Click the **Profile Values Cont.** tab. Check the appropriate check boxes to allow operators in this profile the ability to perform the action listed.

Result: Specific abilities are associated with this profile (see [Figure 9-44](#)).

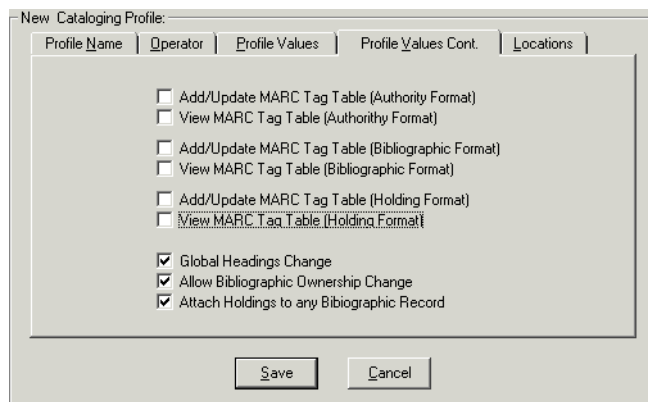


Figure 9-44. Completed Profile Values Cont. Tab

7. Click the **Locations** tab to select the locations you want to link to this profile.
 - a. Highlight one or more Locations from the **Available Locations** list.
 - b. Click the > button.

NOTE:

To move all locations from the **Available Locations** list to the **Selected Locations** list, do not highlight them, simply click the >> button.

Result: The locations have moved from the **Available Locations** to the **Selected Locations** list and are now associated with the profile.

8. After entering information on each of the tabs in the **Cataloging Profiles** workspace, click the **Save** button to save the newly-created profile or click the **Cancel** button if you do not want to save the profile.

Result: The name of the new profile is listed in the **Security - Cataloging Profiles** list (see [Figure 9-45](#)).

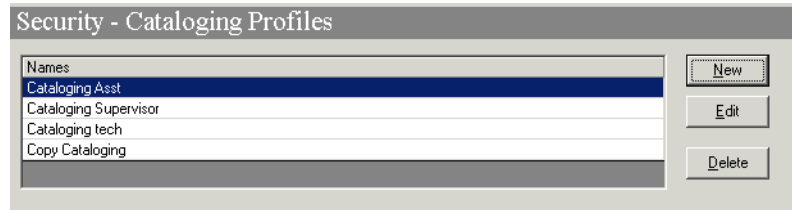


Figure 9-45. New Cataloging Profile in List of Profiles

Editing a Cataloging Profile

You may change any information at any time.



Procedure 9-12. Editing a Cataloging Profile

Use the following to edit a Cataloging Profile.

1. Access the **Security - Cataloging Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Cataloging Profiles** button in the Security listbar.

Result: The **Security - Cataloging Profiles** workspace opens.

2. Highlight the Cataloging Profile you want to edit and click the **Edit** button.

The **Edit Cataloging Profile** section opens with the **Profile Name** tab available.

3. Select the tab(s) containing the information you want to edit and enter the changes.
4. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the Cataloging Profile selected has been edited.

Deleting a Cataloging Profile

You may delete an Cataloging Profile at any time.



Procedure 9-13. Deleting a Cataloging Profile

Use the following to delete a Cataloging Profile.

1. Access the **Security - Cataloging Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Cataloging Profiles** button in the Security listbar.

Result: The **Security - Cataloging Profiles** workspace opens.

2. Highlight the profile you want to delete and click the **Delete** button.

Result: A message asking for confirmation of the deletion displays (see [Figure 9-46](#)).



Figure 9-46. Confirmation Message before Deleting the Profile

3. Click the **Yes** button if you do want to delete this Profile.

Result: The profile is deleted, and no longer displays in **Security - Cataloging Profiles** workspace.

Circulation Profiles - Creating, Editing, and Deleting

Circulation Security Profiles control the functions an operator can perform in the Circulation module.

Each staff person working in a circulation department who performs tasks using Voyager needs an Operator Profile linked to one Circulation Security Profile.

The **Security - Circulation Profiles** workspace displays in [Figure 9-47](#). It contains the tabs: **Profile Name**, **Operator**, **Locations**, **Profile1**, **Profile 2**, **Item Blocks**, **Patron Blocks**, and **Patron Groups**.

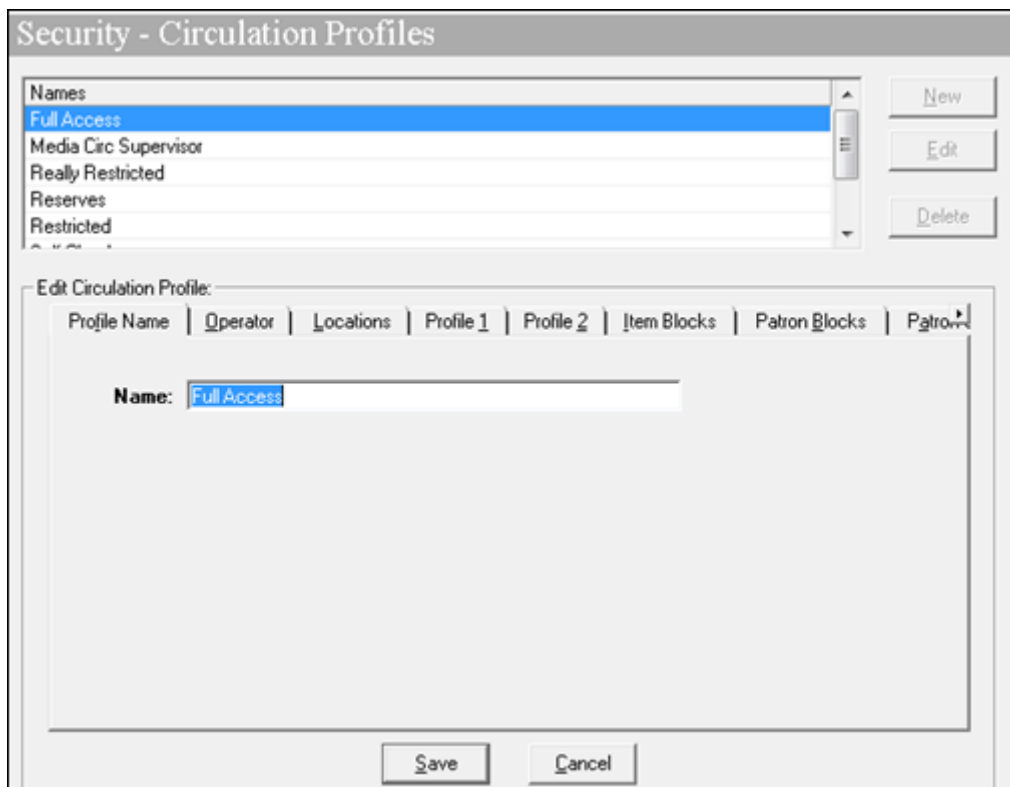


Figure 9-47. Security - Circulation Profiles Workspace

The **Profile Name**, **Operator**, and **Locations** tabs are common elements and discussed in the section [Common Elements in all Security Profiles](#) on [page 9-4](#).

Profile 1 and Profile 2 Tabs

The **Profile 1** and **Profile 2** tabs are where specific privileges are granted such that operators linked to the profile can perform those activities.

You must select at least one profile value for each Circulation security profile.

Select one or more profile values depending upon which operator profiles you want to link to a specific security profile. For example, if you want to give an operator(s) the ability to charge/renew items, select **Charge/Renew**. Select all check boxes if the operator(s) linked to this profile can perform all the functions.

Review each profile value carefully to make sure the security profile as a whole includes the correct combination of options to match your requirements.

[Figure 9-48](#) and [Figure 9-49](#) show the options on the **Profile 1** and **Profile 2** tabs.

Edit Circulation Profile:

Profile Name | Operator | Locations | **Profile 1** | Profile 2 | Item Blocks | Patron Blocks | Patron

☒ Charge/Renew	☒ Add Fines/Fees
☒ Discharge	☐ Modify Outstanding Fines/Fees
☒ Add/Update Recall/Hold Requests	☒ Forgive/Error/Refund Fines/Fees
☒ Resequence Recall/Hold Request Queues	☒ Accept Payments
☒ Change Due Date	☒ Lost item return: refund overdue
☒ Backdate Due Date/Time at Discharge	☒ Lost item return: refund replacement fee
☐ Mask Patron Social Security Number	☒ Lost item return: refund processing fee
	☒ Lost item return: decrement patron lost counter

Save Cancel

Figure 9-48. Profile 1 tab

Figure 9-49. Profile 2 tab

[Table 9-10](#) and [Table 9-11](#) describe the fields found on the **Profile1** and **Profile 2** tabs of the **Security - Circulation Profiles** workspace.

Table 9-10. Profile 1 Tab

Option Name	Description	Type and Range
Charge/Renew	When checked, circulation operators linked to this profile may charge and renew items.	Check box The default is checked. Click to clear.
Discharge	When checked, circulation operators linked to this profile may discharge items.	Check box The default is checked. Click to clear.
Add/Update Recall/ Hold Requests	When checked, circulation operators linked to this profile may create and edit both recall and hold requests.	Check box The default is checked. Click to clear.
Resequence Recall/ Hold Request Queues	When checked, circulation operators linked to this profile may alter the ranking of the Recall/Hold request queues.	Check box The default is checked. Click to clear.

Table 9-10. Profile 1 Tab

Option Name	Description	Type and Range
Change Due Date	When checked, circulation operators linked to this profile may modify due dates.	Check box The default is checked. Click to clear.
Backdate Due Date/ Time at Discharge	When checked, circulation operators linked to this profile may backdate the due date and time at discharge.	Check box The default is checked. Click to clear.
Mask Patron Social Security Number	When checked, circulation operators linked to this profile are not able to view, add, update or search by the patron's social security number (SSN). Where the SSN would normally display, x's display in its place. See Masking SSN on page 9-82 .	Check box The default is unchecked.
Add Fines/Fees	When checked, circulation operators linked to this profile may create fines, fees, and demerits.	Check box The default is checked. Click to clear.
Modify Outstanding Fines/Fees	When checked, circulation operators linked to this profile may edit fines, fees, and demerits.	Check box The default is unchecked.
Forgive/Error/ Refund Fines/Fees	When checked, circulation operators linked to this profile may forgive, error out, or refund fines, fees, or demerits.	Check box The default is checked. Click to clear.
Accept Payments	When checked, circulation operators linked to this profile may accept payments for fines, fees and demerits.	Check box The default is checked. Click to clear.
Lost item return: refund overdue	When checked, circulation operators linked to this profile may process an overdue refund when a lost item is returned (or renewed).	Check box The default is unchecked.
Lost item return: refund replacement fee	When checked, circulation operators linked to this profile may process a refund for a lost item replacement fee when a lost item is returned (or renewed).	Check box The default is unchecked.

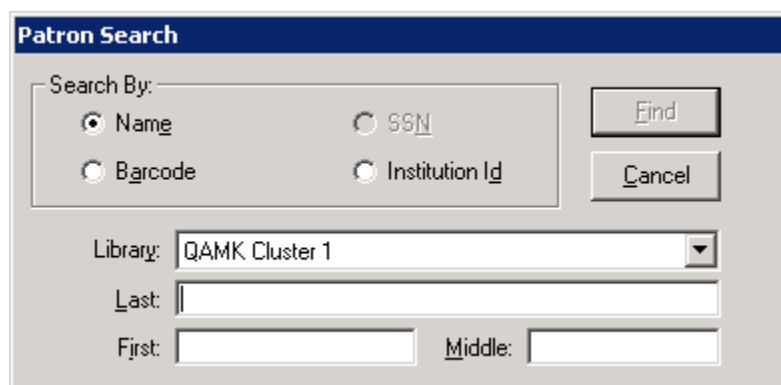
Table 9-10. Profile 1 Tab

Option Name	Description	Type and Range
Lost item return: refund processing fee	When checked, circulation operators linked to this profile may process a refund for a lost item processing fee when a lost item is returned (or renewed).	Check box The default is unchecked.
Lost item return: decrement patron lost counter	When checked, circulation operators linked to this profile may adjust the lost item counter for a patron when a lost item is returned (or renewed).	Check box The default is unchecked.

Masking SSN

When the **Mask Patron Social Security Number** check box is checked, the SSN will not be visible in the following places in the Circulation module.

Patron Search dialog box, **Search By** section, **SSN** radio button is inactive (see [Figure 9-50](#)).



The image shows a 'Patron Search' dialog box. At the top, there's a title bar 'Patron Search'. Below it, a 'Search By:' section contains four radio buttons: 'Name' (which is selected), 'Barcode', 'SSN' (which is disabled), and 'Institution Id' (which is disabled). To the right of these buttons are 'Find' and 'Cancel' buttons. Below the 'Search By' section, there's a 'Library:' dropdown menu currently showing 'QAMK Cluster 1'. Underneath the library dropdown are three text input fields labeled 'Last:', 'First:', and 'Middle:', all of which are currently empty.

Figure 9-50. Social Security Number Masked as a Search By Option

After completing a patron search, the search results list will not display the Social Security Number (see [Figure 9-51](#)).

The image shows a 'Patron Search' dialog box. At the top, there's a title bar 'Patron Search'. Below it, a 'Search By:' section has four radio buttons: 'Name' (selected), 'SSN', 'Barcode', and 'Institution Id'. To the right are 'Find' and 'Clear' buttons. Below this is a 'Library:' dropdown menu showing 'QAMK Cluster 1'. Underneath are input fields for 'Last:' (containing 'pro?'), 'First:', and 'Middle:'. A table displays search results with columns 'Patron Name', 'SSN', and 'Institution Id'. The first row is 'Professor, Paula' with a masked SSN 'xxx - xx - xxxx'. The second row is 'Professor, Scott' with a masked SSN 'xxx - xx - xxxx'. At the bottom are 'OK' and 'Cancel' buttons.

Patron Name	SSN	Institution Id
Professor, Paula	xxx - xx - xxxx	
Professor, Scott	xxx - xx - xxxx	

Figure 9-51. Patron Search Results List with No SSN Displaying

There are different places in the Patron Record where the SSN would usually display. In these situations, the SSN is masked.

For example, the SSN does not display on the **Patron Id** tab (see [Figure 9-52](#)).

The screenshot shows a window titled "Patron ID 254". It contains a form with the following fields: Last: Public, First: John, Middle: Q, Title: Mr., Name Type: Personal, Entered At: Circulation Desk. To the right of these fields are several icons and numerical values: a book icon with "0", a dollar sign icon with "\$0.00", a card icon with "0/0", a pencil icon with "0", a calendar icon with "9/14/06", and a pie chart icon. Below the form is a table with the following data:

Barcode	Patron Group	Status/Date	Operator Id
123321	Graduate Student	Active - 8/19/2002	demo

At the bottom of the window, there are fields for Institution Id: and SSN: xxx - xx - xxx.

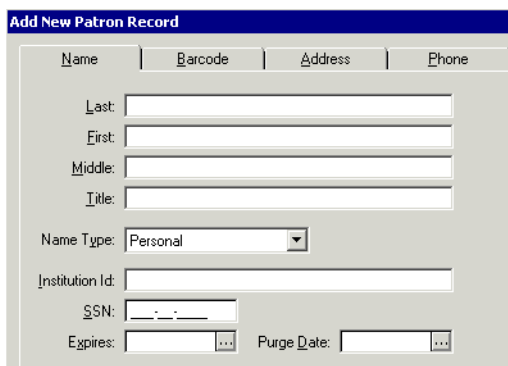
Figure 9-52. Patron Id Tab

Also, when attempting to add a patron record, the **SSN** field does not display in the **Add New Patron Record** dialog box (see [Figure 9-53](#)).

The screenshot shows a dialog box titled "Add New Patron Record". It contains a form with the following fields: Name (Last, First, Middle, Title), Name Type (Personal), Institution Id, Expires (with a calendar icon), and Purge Date (with a calendar icon). There is no SSN field visible.

Figure 9-53. No Social Security Number Field when Adding a Patron Record

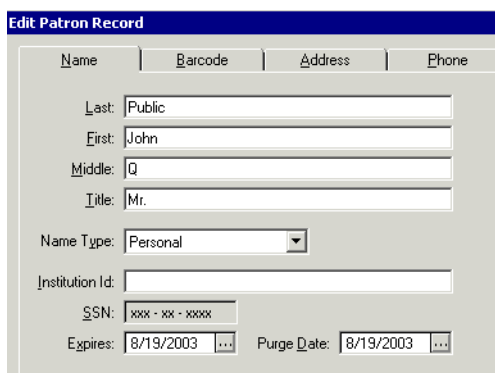
If the box was not checked, that is, the SSN would not be masked, the field would be available to add a SSN (see [Figure 9-54](#)).



The 'Add New Patron Record' form features a blue title bar and four tabs: Name, Barcode, Address, and Phone. The Name tab is active, showing input fields for Last, First, Middle, and Title. Below these is a 'Name Type' dropdown menu set to 'Personal'. Further down are fields for 'Institution Id', 'SSN' (with a masked input pattern of '---'), 'Expires' (with a date picker), and 'Purge Date' (with a date picker).

Figure 9-54. Social Security Number Available to Add to New Patron Record

Also, the SSN does not display when editing a patron record (see [Figure 9-55](#)).



The 'Edit Patron Record' form has a blue title bar and the same four tabs as Figure 9-54. The Name tab is active, showing the same fields as Figure 9-54, but with pre-filled data: Last: Public, First: John, Middle: Q, Title: Mr., Name Type: Personal, Institution Id: (empty), SSN: xxx - xx - xxxx, Expires: 8/19/2003, and Purge Date: 8/19/2003.

Figure 9-55. Edit Patron Record with SSN Masked

Table 9-11. Profile 2 Tab

Option Name	Description	Type and Range
Add/Update Patron Records	When checked, circulation operators linked to this profile may create and edit patron records. Add/Update automatically includes the ability to search and display the record.	Check box The default is checked. Click to clear.
Update PINs	When checked, circulation operators linked to this profile may edit PINs. You must have the Add/Update Patron Records check box checked to activate this check box.	Check box The default is checked. Click to clear.
View-Only Patron Records	When checked, circulation operators linked to this profile may only view patron records. This check box is inactive if Add/Update Patron records is checked.	Check box The default is inactive.
Delete Patron Records	When checked, circulation operators linked to this profile may delete patron records. Delete automatically confers the ability to search and display the record.	Check box The default is checked. Click to clear.
Add/Update Proxy Patron	When checked, circulation operators linked to this profile may create and edit proxy patrons. Add/Update automatically includes the ability to search and display the record.	Check box The default is not checked.
Reset Patron Counters	When checked, circulation operators linked to this profile may reset the patron counters on the patron record.	Check box The default is checked. Click to clear.

Table 9-11. Profile 2 Tab

Option Name	Description	Type and Range
Edit Stub Patrons	When checked, circulation operators linked to this profile may edit stub patron records. NOTE: This is only active if your site uses Universal Borrowing or has more than one Circulation Cluster in the database.	Check box The default is not checked.
Manually Map Remote Patrons	When checked, circulation operators linked to this profile may manually map remote patrons. NOTE: This is only active if your site uses Universal Borrowing or has more than one Circulation Cluster in the database.	Check box The default is not checked.
Distribute Item field	This field determines the privileges granted to operators linked to this profile for distributable items. See Table 9-12 on page 9-89 for more information.	A set of system defined privileges, in ascending order of privilege, populates the drop-down list. Delete is the default.
Process Course Reserve	When checked, circulation operators linked to this profile may search, display, create, and edit Course Reserve Lists in the Circulation module.	Check box The default is checked. Click to clear.
View Patron Info in Item Circulation History	When checked, the operator associated with this profile is able to see the patron information in the circulation module. If not checked, the information displays as a run of asterisks. NOTE: The number of asterisks does not reflect the number of characters in the name or barcode.	Check box The default is not checked.

Table 9-11. Profile 2 Tab

Option Name	Description	Type and Range
Add/Update Item Records	When checked, circulation operators linked to this profile may create and edit item records. They are also, able to create bibliographic and MFHD records. Add/Update automatically includes the ability to search and display the record. This option must be selected to allow for the bibliographic suppress flag function in Circulation. See the Pick and Scan chapter in the <i>Cataloging User's Guide</i> for more information.	Check box The default is checked. Click to clear.
Set/Change Item Status	When checked, circulation operators linked to this profile may set or change an Item Status.	Check box The default is inactive.
Attach Holdings to Any Bibliographic Record	When checked, circulation operators linked to this profile may attach holdings to any bibliographic record for the Owning library.	Check box The default is checked.
Update Holdings Record with Pick and Scan	When checked, circulation operators linked to this profile may update holdings records using Pick and Scan. This option must be selected to allow for the MFHD suppress flag function in Circulation. See the Pick and Scan chapter in the <i>Cataloging User's Guide</i> for more information.	Check box The default is checked.
Delete Item Records	When checked, circulation operators linked to this profile may delete item records. Delete automatically confers the ability to search and display the record.	Check box The default is checked. Click to clear.

Table 9-11. Profile 2 Tab

Option Name	Description	Type and Range
Delete Holdings Records	When checked, circulation operators linked to this profile may delete holdings records. Delete automatically confers the ability to search and display the record.	Check box The default is checked. Click to clear.
Delete Bibliographic Records	When checked, circulation operators linked to this profile may delete bibliographic records. Delete automatically confers the ability to search and display the record.	Check box The default is checked. Click to clear.

Distribute Item

Note that when setting the Distribution Item security level, each level specified in the drop-down list allows the rights of all of the prior levels as well as the current one. Each level has the following privileges.

Table 9-12. Item Distribution Security Level Privileges

Security Level	Description
No Access	No distribution item related privileges.
View	View an item's inventory record.
Distribute	Rights of View, plus distributing an item to a patron.
Create	Rights of Distribute, plus creating an item's inventory record.
Update	Rights of Create, plus updating an existing item's inventory record.
Order	Rights of Update, plus placing orders for distributable items.
Receive	Rights of Order, plus receiving ordered copies.
Delete	Rights of Receive, plus deleting an item's inventory record.

Security for Pick and Scan

The security for the Pick and Scan feature is based on the security determined in the **Profile 2** tab.

Operators with **Update Holdings Record with Pick and Scan** authorization may use Pick and Scan to edit the:

- Holdings, permanent, and/or temporary location

Operators with **Add/Update Item Records** authorization may use Pick and Scan to edit the:

- Permanent, temporary, and/or media type
- Item status
- Statistical categories

Operators with **Delete Item Records** authorization may use Pick and Scan to:

- Delete item records

Item Blocks Tab

The **Item Blocks** tab allows administrators to specify which of the Item blocks an operator linked to the profile is able to override during a circulation transaction.

[Figure 9-56](#) displays the **Item Blocks** tab in the **Security - Circulation Profiles** workspace.

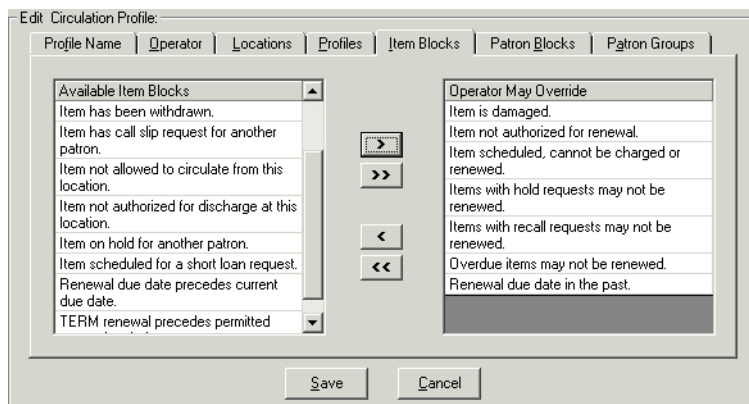


Figure 9-56. Item Blocks Tab

[Table 9-13](#) describes the List boxes found on the **Item Blocks** tab of the **Security - Circulation Profile** workspace.

Table 9-13. Item Blocks Tab

List Box Name	Description	Required	Type and Range
Available Item Blocks	List of all available Item Blocks.	Yes	This list is populated by all available Item blocks defined by the System.
Operator May Override	List of those Item blocks that operator who are linked to the profile can override.	No	Moved from the Available Item Blocks list box.

[Table 9-14](#) describes the Item blocks that operators linked to this profile may be allowed to override.

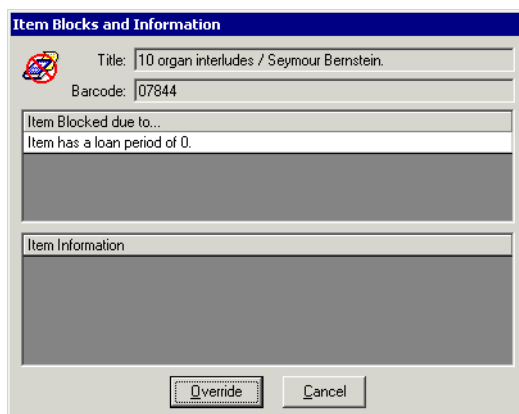
Table 9-14. List of Item Blocks

Item Block
End-of-Term Date Not found for TERM loan.
Item does not Circulate.
Item has a loan period of 0.
Item has been withdrawn.
Item has call slip request for another patron.
Item is damaged.
Item is not allowed to circulate from this location.
Item is not authorized for discharge at this location.
Item is not authorized for renewal.
Item on hold for another patron.
Item scheduled for a short loan request.
Item scheduled, cannot be charged or renewed.
Items with hold requests may not be renewed.
Items with recall requests may not be renewed.
Item is at Renewal limit.
Overdue items may not be renewed.
Renewal due date in the past.

Table 9-14. List of Item Blocks

Item Block
Renewal due date precedes current due date.
TERM renewal precedes permitted renewal period.
Item has an item status of Lost - Library Applied.
Item has an item status of Lost - System Applied.
Item has an item status of Missing.

If a block occurs during a circulation transaction and the operator is allowed to override the block, click the **Override** button on the **Item Blocks and Information** dialog box (see [Figure 9-57](#)) to continue the transaction.

**Figure 9-57. Item Block Dialog Box with Override Button**

If an operator is unable to override a block, a **Supervisor** button displays on the dialog box instead of an **Override** button (see [Figure 9-58](#)).

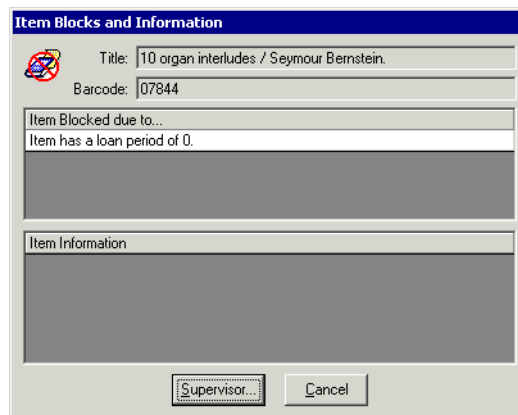


Figure 9-58. Item Blocks and Information Dialog Box with Supervisor Button

When you click the **Supervisor** button, the **Supervisor Override** dialog box opens (see [Figure 9-59](#)).

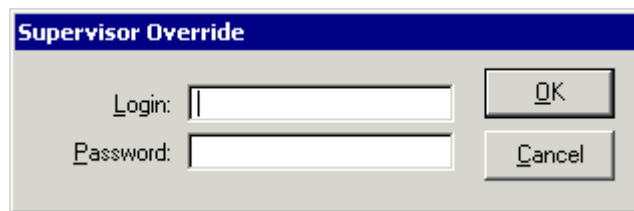


Figure 9-59. Supervisor Override Dialog Box

Then a supervisor, that is someone who does have the security to override the block, logs in and the transaction is allowed to continue. When the supervisor logs in, authorizations are checked. If they do not have the authorization to override the block the message stating so displays (see [Figure 9-60](#)).



Figure 9-60. Supervisor Does Not Have Override Authority

NOTE:

In a situation where there are multiple blocks occurring at a time, if any single block listed is one that the circulation operator is unable to override, then the **Supervisor** button displays on the **Item Blocks and Information** dialog box.

See the *Voyager Circulation User's Guide*, [Item Blocks](#), for more information on Item Blocks.

Patron Blocks Tab

The **Patron Blocks** tab allows administrators to specify which of the Patron blocks an operator linked to the profile is able to override during a circulation transaction.

[Figure 9-61](#) displays the **Patron Blocks** tab in the **Security - Circulation Profiles** workspace.

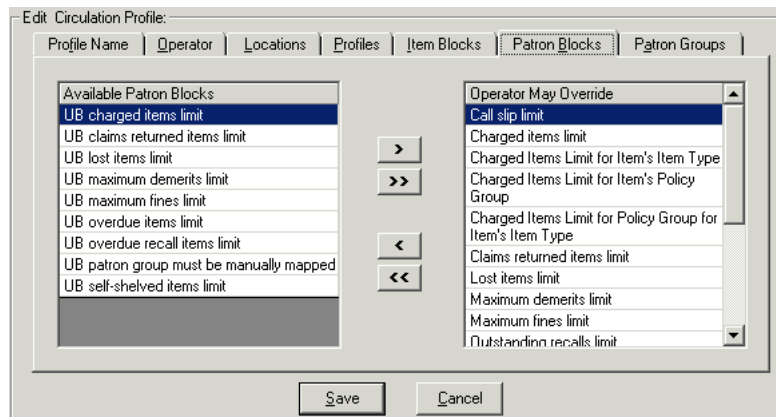


Figure 9-61. Patron Blocks Tab

[Table 9-15](#) describes the List boxes found on the **Patron Blocks** tab of the **Security - Circulation Profile** workspace.

Table 9-15. Patron Blocks Tab

List Box Name	Description	Required	Type and Range
Available Patron Blocks list box	List of all available Patron Blocks.	Yes	This list is populated by all available Patron blocks defined by the System.
Operator May Override list box	List of those Patron blocks that operator who are linked to the profile can override.	No	Moved from the Available Patron Blocks list box.

[Table 9-16](#) describes the Patron blocks that an operator may be allowed to override.

Table 9-16. List of Patron Blocks

Patron Block
Call Slip limit.
Charged Item limit.
Charged Items limit for Item's Item Type
Charged Items limit for Item's Policy Group

Table 9-16. List of Patron Blocks

Patron Block
Charged Items limit for Policy Group for Item's Item Type
Claims returned items limit.
Lost items limit.
Maximum demerits limit.
Maximum fines limit.
Outstanding recalls limit.
Overdue items limit.
Overdue recalled items.
Patron address expired.
Patron is ineligible for UB.
Patron is suspended.
NOTE: If an operator is able to override this patron suspension block, they are allowed to manually apply a suspension a patron in the Circulation module.
Patron registration expired.
Permanent address flagged 'Hold Mail.'
Self-shelved items limit.
Short loan limit.
UB charged items limit.
UB claims returned items limit.
UB lost items limit.
UB maximum demerits limit.
UB maximum fines limit.
UB maximum overdue limit.
UB overdue recall items limit.
UB self-shelved items limit.

NOTE:

The UB Blocks are used if your site has multiple Circulation Clusters, and/or participates in Universal Borrowing with other Voyager sites

If a block occurs during a circulation transaction and the operator is allowed to override the block, click the **Override** button on the **Patron Blocks and Information** dialog box to continue the transaction.

If the **Supervisor** button displays on the dialog box instead of an **Override** button, the operator must have a supervisor (someone who has security override permissions) override the transaction. Click the **Supervisor** button to open the **Supervisor Override** dialog box. The supervisor may then log in and allow the transaction to continue.

NOTE:

In a situation where there are multiple blocks occurring at a time, if any single block listed is one that the circulation operator is unable to override, then the **Supervisor** button displays on the **Patron Blocks and Information** dialog box.

See the *Voyager Circulation User's Guide*, [Patron Blocks](#), for more information on Patron Blocks.

Patron Groups Tab

The **Patron Groups** tab (see [Figure 9-62](#)) allows administrators to restrict an operator profile (and therefore the operators linked to that profile) access to the patron records of specified patron groups. For example, not allowing student staff members access to faculty patron records.

You may also designate that an operator profile cannot charge items out to the members of a specific patron group.

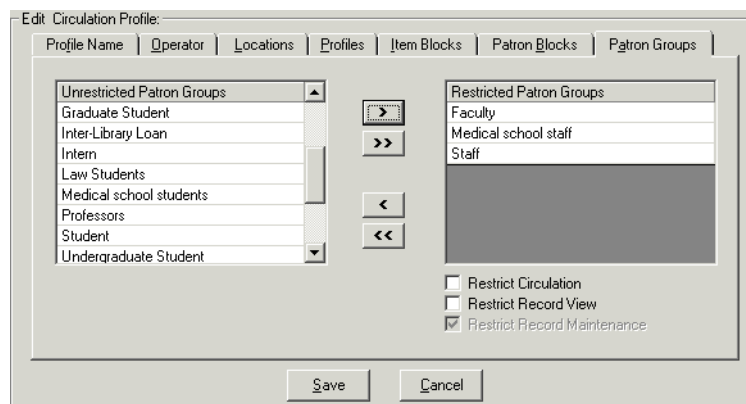


Figure 9-62. Patron Groups Tab

[Table 9-17](#) describes the list boxes and check boxes found on the **Patron Groups** tab of the **Security - Circulation Profile** workspace.

Table 9-17. Patron Groups Tab

Name	Description	Required	Type and Range
Unrestricted Patron Groups list box	List of all available Patron Groups that have no restrictions. NOTE: In a multi-clustered environment, patron group names may be duplicated.	Yes	This list is populated by all available Patron Groups defined in the System Administration module. Patron Groups on page 5-38 .
Restricted Patron Groups list box	List of those Patron Groups who are restricted from all operators who are linked to the profile.	No	Moved from the Unrestricted Patron Groups list box.
Restrict Circulation	When checked, operators in the profile are unable to charge/renew items, or add/update hold or recall requests. This restriction is applied to every patron group on the Restricted Patron groups list. Checking the Restrict Circulation check box also restricts the viewing of patron records.	No Active only if security profile allows charge/renew, add/update of hold/recall requests.	Check box
Restrict Record View	When checked, operators in the profile are unable to view the patron records, this restriction is applied to every patron group on the Restricted Patron groups list.	No Active only if security profile allows patron view.	Check box

Table 9-17. Patron Groups Tab

Name	Description	Required	Type and Range
Restrict Record Maintenance	Adding a group to the Restricted Patron Groups list automatically checks this box restricting the operator profile from performing record maintenance. Operators are unable to create or edit the patron records of the selected patron group.	No Active only if security profile allows patron add/update patron record.	Check box

Creating a Circulation Profile

Before you can create a new circulation profile, the following must be completed:

- Operators must be defined. See [Operator Profiles Workspace](#) on [page 9-15](#).
- Locations must be defined. See [Locations](#) on [page 10-39](#).



Procedure 9-14. Creating a Circulation Profile

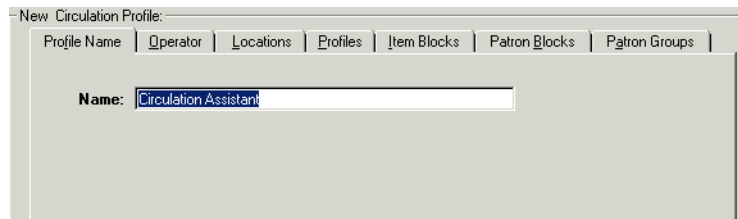
Perform the following steps to create a Circulation Profile:

1. Access the **Security - Circulation Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Circulation Profiles** button in the Security listbar.

Result: The **Security - Circulation Profiles** workspace opens.

2. Click the **New** button to create a profile.

Result: The bottom half of the workspace opens to the **New Circulation Profile** section, **Profile Name** tab (see [Figure 9-63](#)).



The screenshot shows a web application window titled "New Circulation Profile:". Below the title is a tabbed interface with six tabs: "Profile Name", "Operator", "Locations", "Profiles", "Item Blocks", and "Patron Groups". The "Profile Name" tab is currently selected. Within this tab, there is a label "Name:" followed by a text input field. The input field contains the text "Circulation Assistant".

Figure 9-63. Security - Circulation Profiles Workspace, Profile Name Tab

3. Enter the profile name in the **Profile Name** field.

NOTE:

Once a Profile Name is provided, the **Save** button becomes active. At any point, the operator may click the **Save** button to save the profile or click the **Cancel** button if they do not want to save the profile. If saved, the bottom half of the workspace changes from **New Circulation Profile** to **Edit Circulation Profile**.

4. Click the **Operator** tab to select the operators you want to link to this profile.
 - a. Highlight one or more operators from the **Available Operators** list.
 - b. Click the > button.

NOTE:

To move all operators from the **Available Operators** list to the **Selected Operators** list, do not highlight them, simply click the >> button.

Result: The operators have moved from the **Available Operators** to the **Selected Operators** list and are now associated with the profile (see [Figure 9-64](#)).

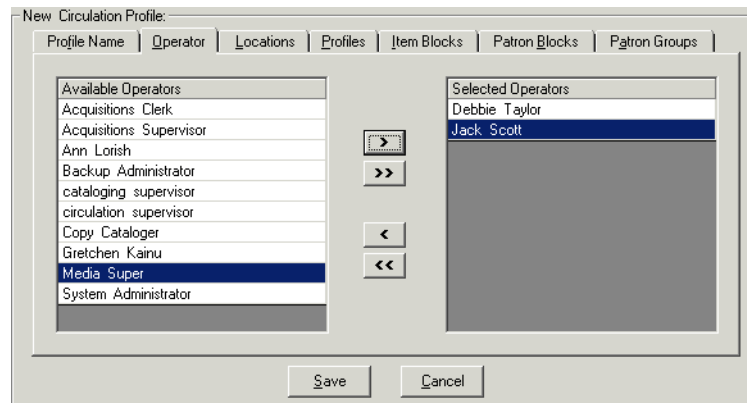


Figure 9-64. Completed Operator Tab

5. Click the **Locations** tab to select the locations you want to link to this profile.
 - a. Highlight one or more Locations from the **Available Locations** list.
 - b. Click the > button.

NOTE:

To move all locations from the **Available Locations** list to the **Selected Locations** list, do not highlight them, simply click the >> button.

Result: The locations have moved from the **Available Locations** to the **Selected Locations** list and are now associated with the profile (see [Figure 9-65](#)).

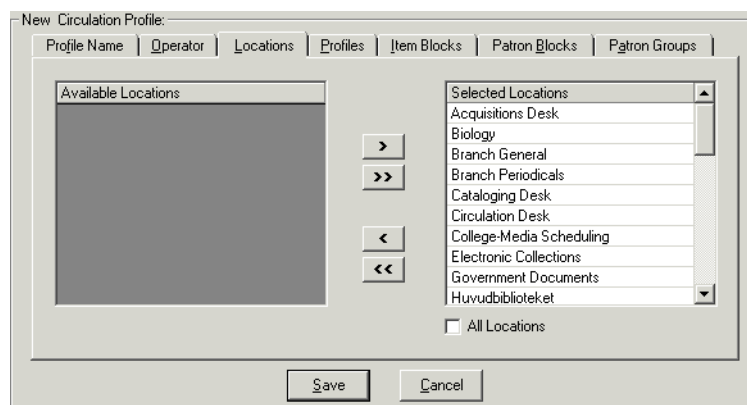


Figure 9-65. Completed Locations Tab

6. Click the **Profiles** tab. Check the appropriate check boxes to allow operators in this profile the ability to perform the action listed.

Result: Specific abilities are associated with this profile (see [Figure 9-66](#)).

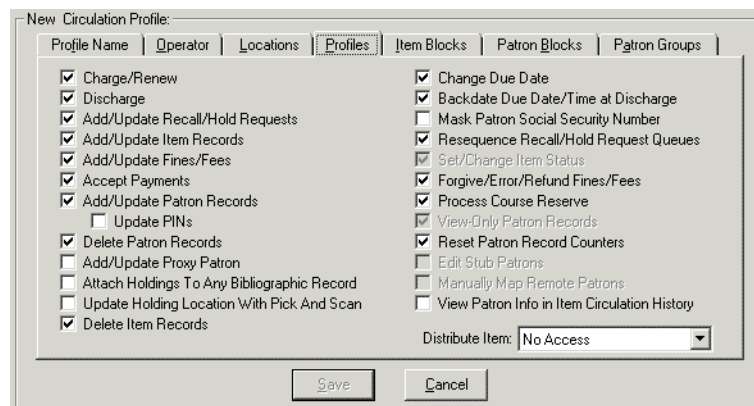


Figure 9-66. Completed Profiles Tab

7. Click the **Item Blocks** tab to select the Item blocks you want the operators linked to this profile to be able to override.
 - a. Highlight one or more of the Items Blocks from the **Available Item Blocks** list.

- b. Click the > button.

NOTE:

To move all Item Blocks from the **Available Item Blocks** list to the **Operator May Override** list, do not highlight them, simply click the >> button.

Result: The operators linked to this profile now have the ability to override those item blocks listed in the **Operator May Override** list (see [Figure 9-67](#)).

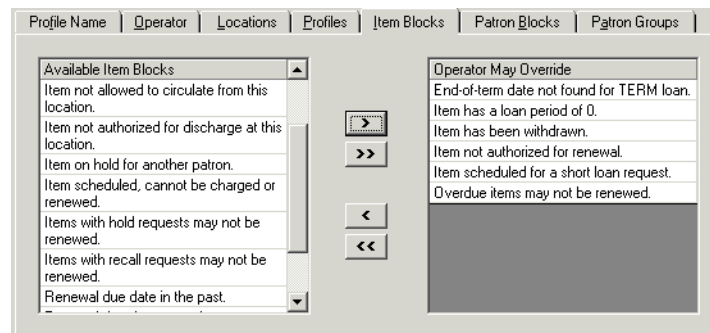


Figure 9-67. Completed Item Blocks Tab

8. Click the **Patron Blocks** tab to select the Patron blocks you want the operators linked to this profile to be able to override.
 - a. Highlight one or more of the Patron Blocks from the **Available Patron Blocks** list.
 - b. Click the > button.

NOTE:

To move all Patron Blocks from the **Available Patron Blocks** list to the **Operator May Override** list, do not highlight them, simply click the >> button.

Result: The operators linked to this profile now have the ability to override those item blocks listed in the **Operator May Override** list (see [Figure 9-68](#)).

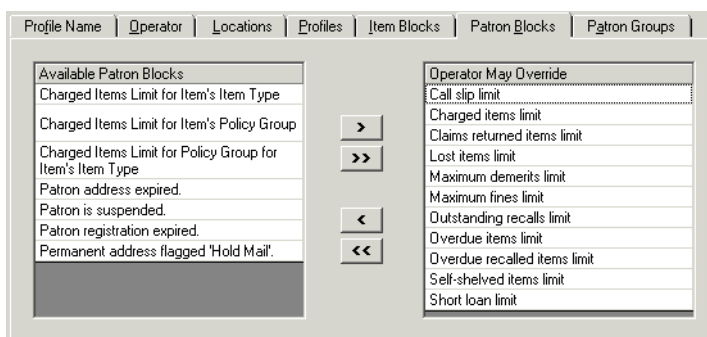


Figure 9-68. Completed Patron Blocks Tab

9. Click the **Patron Groups** tab to apply viewing or circulation restrictions on the patron groups that the operators linked to this profile.
 - a. Highlight one or more of the Patron Groups from the **Unrestricted Patron Groups** list.
 - b. Click the **>** button.

NOTE:

To move all Patron Groups from the **Unrestricted Patron Groups** list to the **Restricted Patron Groups** list, do not highlight them, simply click the **>>** button.

- c. Check the **Restrict Circulation** or **Restrict Record View** check box if wanted.

Result: The operators linked to this profile now have the restrictions applied to the Patron Groups selected (see [Figure 9-69](#)).

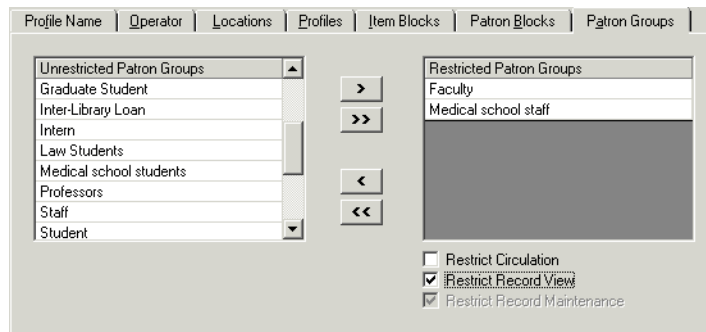


Figure 9-69. Completed Patron Groups Tab

10. After entering information on each of the tabs in the **Security - Circulation Profile** workspace, click the **Save** button to save the newly-created profile or click the **Cancel** button if you do not want to save the profile.

Result: The name of the new profile is listed in the **Security - Circulation Profiles** list (see [Figure 9-70](#)).

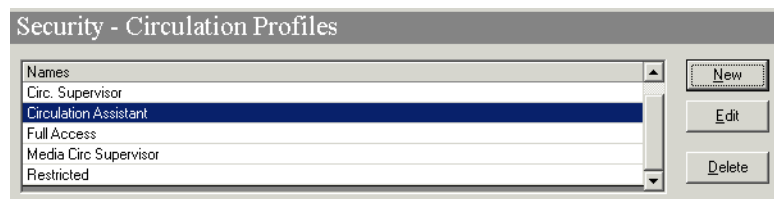


Figure 9-70. New Circulation Profile in List of Profiles

Editing a Circulation Profile

You may change any information at any time.



Procedure 9-15. Editing a Circulation Profile

Use the following to edit a Circulation Profile.

1. Access the **Security - Circulation Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Circulation Profiles** button in the Security listbar.

Result: The **Security - Circulation Profiles** workspace opens.

2. Highlight the Circulation Profile you want to edit and click the **Edit** button.

Result: The **Edit Circulation Profile** section opens with the **Profile Name** tab available (see [Figure 9-71](#)).

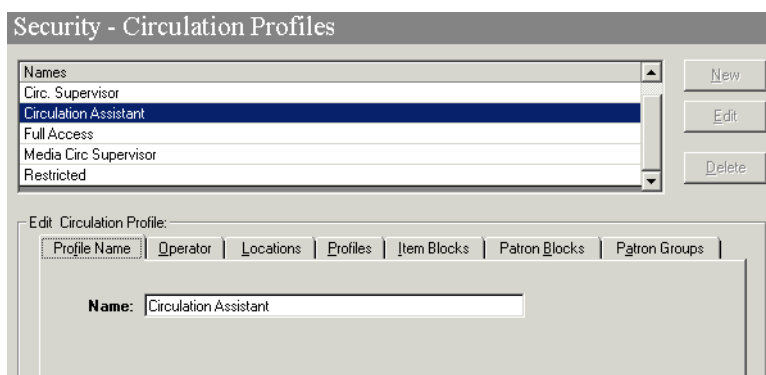


Figure 9-71. Circulation Profiles Workspace, Edit Circulation Profile Section

3. Select the tab(s) containing the information you want to edit and enter the changes.
4. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the Circulation Profile selected has been edited.

Deleting a Circulation Profile

You may delete a Circulation Profile at any time.



Procedure 9-16. Deleting a Circulation Profile

Use the following to delete a Circulation Profile.

1. Access the **Security - Circulation Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Circulation Profiles** button in the Security listbar.

Result: The **Security - Circulation Profiles** workspace opens.

2. Highlight the profile you want to delete and click the **Delete** button.

Result: A message asking for confirmation of the deletion displays (see [Figure 9-72](#)).

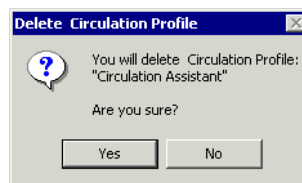


Figure 9-72. Confirmation Message before Deleting the Profile

3. Click the **Yes** button if you want to delete this Profile.

Result: The profile is deleted, and no longer displays in **Security - Circulation Profiles** workspace.

Analyzer Profiles - Creating, Editing, and Deleting

The **Security - Analyzer Profiles** workspace, if enabled by purchasing Analyzer, allows the administrator to define security profiles. These profiles determine the types of reports an operator can view and the level in which these reports may be accessed.

Each staff person who needs access to the Analyzer reports must have an Operator Profile linked to one Analyzer Security Profile.

When first accessing the **Security - Analyzer Profiles** work space, a list of current profiles displays. From this list administrators may create, edit, and delete Analyzer security profiles.

The **Security - Analyzer Profiles** workspace (as shown in [Figure 9-73](#)) contains the tabs: **Profile Name**, **Operator**, **Access Level**, and **Packages**.

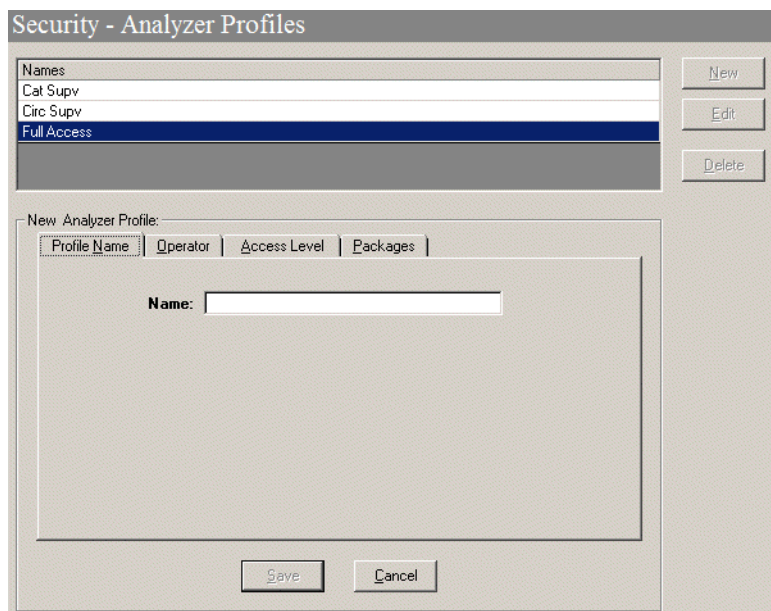


Figure 9-73. Security - Analyzer Profiles Workspace

The **Profile Name** and **Operator** tabs are common elements which are discussed in section [Common Elements in all Security Profiles](#) on [page 9-4](#).

Access Level Tab

The **Access Level** tab allows administrators to assign an access level, which permits an operator to view reports and to create reports with Query Studio or Report Studio.

[Figure 9-74](#) displays the **Access Level** tab in the **Security - Analyzer Profiles** workspace.

vsaseccircpatronblockstab.gif

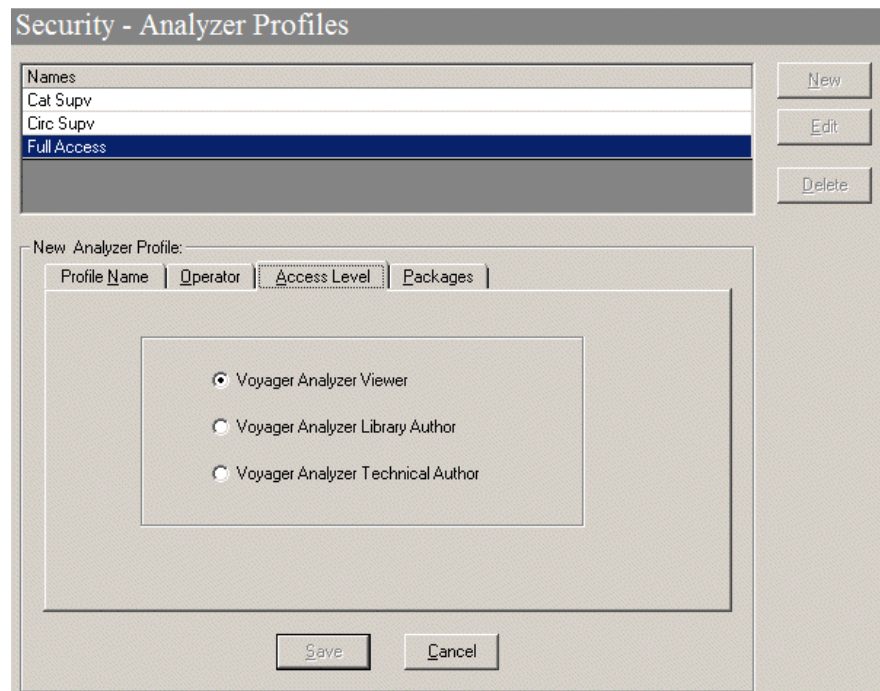


Figure 9-74. Access Level Tab

[Table 9-18](#) describes the fields found on the **Access Level** tab of the **Security - Analyzer Profile** workspace.

Table 9-18. Patron Blocks Tab

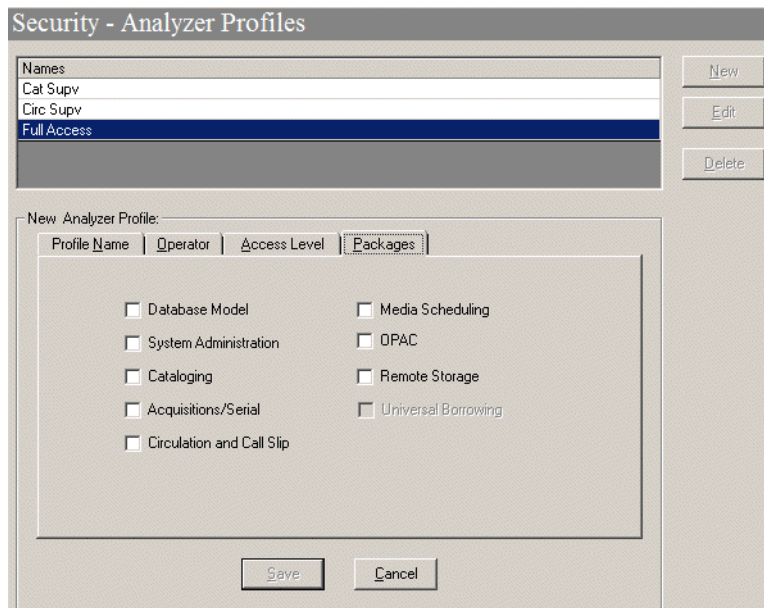
Field Name	Description	Reqd.	Type
Voyager Analyzer Viewer	Allows the operator to run reports for the specified packages.	No	Radio button.

Table 9-18. Patron Blocks Tab

Field Name	Description	Reqd.	Type
Voyager Analyzer Library Author	Allows the operator to run reports and create Query Studio reports for the specified packages.	No	Radio button.
Voyager Analyzer Technical Author	Allows the operator to run reports and create Query Studio reports or Report Studio reports for the specified packages.	No	Radio button.

Packages Tab

The **Packages** tab (as shown in [Figure 9-75](#)) allows administrators to assign a package, which allows an operator to access the reports that are associated with that module or functionality.

**Figure 9-75. Packages Tab**

[Table 9-19](#) describes the fields on the **Packages** tab of the **Security - Analyzer Profile** workspace.

Table 9-19. Packages Tab

Name	Description	Reqd.	Type
Database Model	Provides access to all reports, not just the reports associated with a specific module or functionality. NOTE: Selecting this check box, automatically selects all of the other packages.	No	Check box.
System Administration	Provides access to reports associated with System Administration.	No	Check box.
Cataloging	Provides access to reports associated with Cataloging.	No	Check box.
Acquisitions/Serial	Provides access to reports associated with Acquisitions/Serial.	No	Check box.
Circulation and Call Slip	Provides access to reports associated with Circulation and Call Slip.	No	Check box.
Media Scheduling	Provides access to reports associated with Media Scheduling.	No	Check box.
OPAC	Provides access to reports associated with OPAC.	No	Check box.
Remote Storage	Provides access to reports associated with remote storage.	No	Check box.
Universal Borrowing	Provides access to reports associated with Universal Borrowing.	No	Check box.

Creating an Analyzer Profile

Before you can create a new Analyzer profile, the following must be completed:

- Operators must be defined. See [Operator Profiles Workspace](#) on [page 9-15](#).



Procedure 9-17. Creating an Analyzer Profile

Perform the following steps to create an Analyzer Profile:

1. Access the **Security - Analyzer Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Analyzer Profiles** button in the Security listbar.

Result: The **Security - Analyzer Profiles** workspace opens.

2. Click the **New** button to create a profile.

Result: The bottom half of the workspace opens to the **New Analyzer Profile** section, **Profile Name** tab (see [Figure 9-76](#)).

The screenshot shows a dialog box titled "New Analyzer Profile:". It has four tabs: "Profile Name", "Operator", "Access Level", and "Packages". The "Profile Name" tab is selected. Inside the dialog, there is a label "Name:" followed by a text input field containing the text "Circulation Assistant". At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

Figure 9-76. Security - Analyzer Profiles Workspace, Profile Name Tab

3. Enter the profile name in the **Profile Name** field.
4. Click the **Operator** tab to select the operators you want to link to this profile.
 - a. Highlight one or more operators from the **Available Operators** list.
 - b. Click the > button.

NOTE:

To move all operators from the **Available Operators** list to the **Selected Operators** list, do not highlight them, simply click the >> button.

Result: The operators have moved from the **Available Operators** to the **Selected Operators** list and are now associated with the profile (see [Figure 9-77](#)).

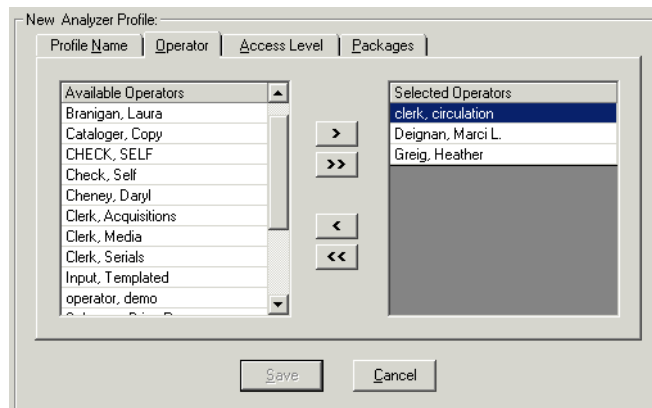


Figure 9-77. Completed Operator Tab

5. Click the **Access Level** tab and select one of the access level radio buttons.

Result: Specific permissions are associated with this profile (see [Figure 9-78](#)).

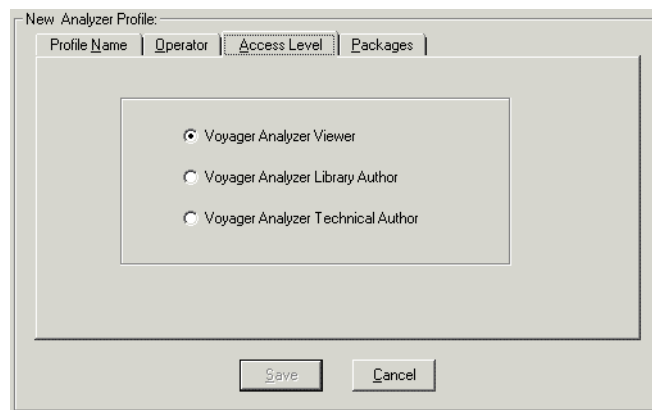


Figure 9-78. Completed Access Level Tab

6. Click the **Packages** tab and select one of the packages.

NOTE:

Once a Profile Name and Package is provided, the **Save** button becomes active. The operator may click the **Save** button to save the profile or click the **Cancel** button to exit without saving changes. If saved, the bottom half of the workspace changes from **New Analyzer Profile** to **Edit Analyzer Profile**.

Result: Access to specific report packages are associated with this profile (see [Figure 9-79](#)).

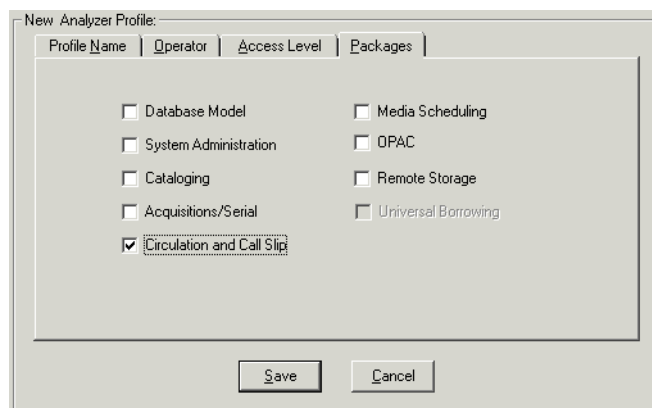


Figure 9-79. Completed Packages Tab

7. After entering information on each of the tabs in the **Security - Analyzer Profile** workspace, click the **Save** button to save the newly-created profile or click the **Cancel** button if you do not want to save the profile.

Result: The name of the new profile is listed in the **Security - Analyzer Profiles** list (see [Figure 9-80](#)).

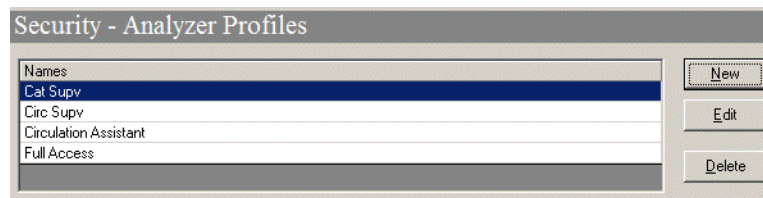


Figure 9-80. New Analyzer Profile in List of Profiles

Editing an Analyzer Profile

You may change any information at any time.



Procedure 9-18. Editing an Analyzer Profile

Use the following to edit an Analyzer Profile.

1. Access the **Security - Analyzer Profiles** workspace.
 - a. Click **Security** in the listbar.
 - b. Click the **Analyzer Profiles** button in the Security listbar.

Result: The **Security - Analyzer Profiles** workspace opens.

2. Highlight the Analyzer Profile you want to edit and click the **Edit** button.

Result: The **Edit Analyzer Profile** section opens with the **Profile Name** tab available (see [Figure 9-81](#)).

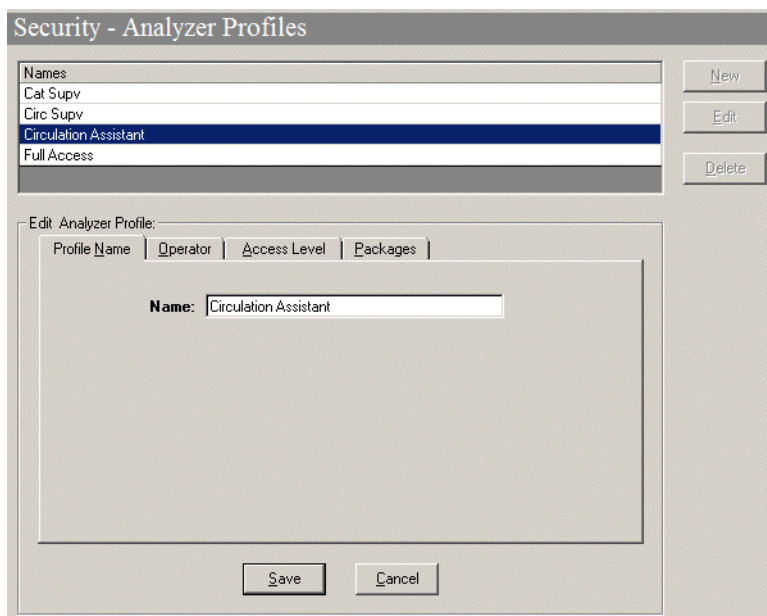


Figure 9-81. Analyzer Profiles Workspace, Edit Analyzer Profile Section

3. Select the tab(s) containing the information you want to edit and enter the changes.
4. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the Analyzer Profile selected has been edited.

Deleting an Analyzer Profile

You may delete an Analyzer Profile at any time.



Procedure 9-19. Deleting an Analyzer Profile

Use the following to delete an Analyzer Profile.

1. Access the **Security - Analyzer Profiles** workspace.
 - a. Click **Security** in the listbar.

- b. Click the **Analyzer Profiles** button in the Security listbar.

Result: The **Security - Analyzer Profiles** workspace opens.

2. Highlight the profile you want to delete and click the **Delete** button.

Result: A message asking for confirmation of the deletion displays (see [Figure 9-82](#)).

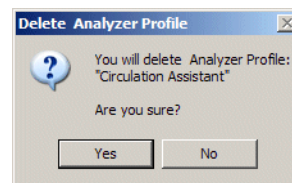


Figure 9-82. Confirmation Message before Deleting the Profile

3. Click the **Yes** button if you want to delete this profile.

Result: The profile is deleted and no longer displays in the **Security - Analyzer Profiles** workspace.

Global Data Change Profiles

The Global Data Change (GDC) profiles determine the level of access/authorization a user has in the Voyager Global Data Change (GDC) client. Full access to the GDC client would allow the authorized user to permanently change bibliographic, holdings (MFHD), and authority records in your MARC database. The GDC profile provides you the capability to mix and match the security options for the different types of users at your institution and the different levels of authorizations/functions you want them to be able to perform. See [Table 9-20](#) on [page 9-118](#) for a description of Global Data Change profile options.

Security limitations are provided for:

- Types of records that can be processed:
 - Bibliographic
 - MFHD
 - Authority

- Types of rules that can be defined:
 - Data change
 - Scan
- Types of activities/actions that can be processed:
 - Add (Copy), Update, or Delete

NOTE:

The Delete check box for Bibs, MFHD, and Auth record sets specifically refers to permission to delete the record set (that contains a collection of record IDs).

The Use "Delete entire record" Rule check box for Bibs, MFHD, and Auth record sets specifically refers to permission to use a rule that deletes an entire record while processing rules.

- Preview
 - Run or terminate batch jobs
- Defined locations

Table 9-20. Global Data Change Profile Options

Option	Description
Profile Name tab	Use this tab to identify the name of a GDC profile.
Operator tab	For the profile you are creating or editing, use this profile to identify the operators to which this profile applies.

Table 9-20. Global Data Change Profile Options

Option	Description
Profile Values tab	For the operators that you identified on the Operator tab, use the options on this tab to identify user permissions for them for working with record sets, data change rules, scan rules, preview, and the ability to specify the Delete entire record rule. When you specify Add (that includes the ability to use the copy function), Update, or Delete, the View option is automatically selected and becomes an unavailable option. View becomes an available option when the Add, Update, and Delete check boxes have been cleared. The Add, Update, Delete, Allow to Preview, and Delete entire record actions associated with record sets can be restricted by the following record set types: Bib, MFHD, or Auth. NOTE: Being able to delete a GDC record set is not the same thing as being able to delete a record from the Voyager database. Deleting records from the Voyager database happens as a result of processing jobs submitted through GDC Job Management. NOTE: When you remove the permission to Add record sets (Save to New Set), this also includes the ability to Copy record sets. However, a user that does not have permission to Add record sets can still add record IDs to an existing record set (Save to Existing Set). NOTE: For users with permission to View rules, they can preview a rule on a single record not tied to a record set. NOTE: When the Delete entire record permission is selected, the user is able to use the Delete entire record actions rule on records in a particular record set. This capability is validated at execution when a job is submitted to run. If an attempt is made to delete a record for which one is not authorized, the system places an error in the execution log; and the record is not deleted.

Table 9-20. Global Data Change Profile Options

Option	Description
Profile Values Cont. tab	For the operators that you identified on the Operator tab, use the options on this tab to identify user permissions for them for executing jobs in GDC Job Management. Permissions for executing jobs in GDC Job Management can be restricted by the following record set types and specifying what can be done for each type: • Bibliographic • MFHD • Authority Permissions to terminate jobs (Kill Job) is not restricted by record set types. This tab also provides security options for: • Auth Load (Match/Merge) jobs • Terminating jobs (by defining which job types can be terminated) NOTE: To delete a job, the users require both the Remove Log Files and Remove MARC Files permissions.
Locations tab	Use this tab to identify the locations for which GDC functions can be performed for the profile you are creating. NOTE: A job can still be run using a set that contains a mix of records that includes ones associated with locations outside the operator's permissions as identified on the Locations tab. During job execution, when records in a set are identified as outside the operator's permitted location settings, no change will be made to those records; and an entry is added to the log for each record to which this applies.

Before setting up GDC security profiles, review the *Global Data Change* guide for an understanding of the functions/options that the GDC client can provide. With this understanding, you can then determine what access or security limitations are needed for those users permitted to use GDC.

Consider the following as you identify the profile security options for GDC:

- Should access be limited to one user?
- Should access be limited by types of records? Should only certain staff be permitted to change authority records?

- Should certain staff be permitted to create rules but not execute them in Job Management?
- Who should be permitted to execute batch jobs through Job Management?
- Who should be permitted to terminate batch jobs?
- Should certain staff be limited to developing scan rules (for record selection) and not have access to developing data change rules?
- Should certain staff have view-only access?
- Should access be limited by location?

Examples

To provide full access for a specified operator(s):

- Check all the options on the Profile Values tab except View (which becomes inactive)

Figure 9-83. Profile Values Tab

- Check all the options on the Profile Values Cont. tab

Edit Global Data Change Profile:

Profile Name | Operator | Profile Values | **Profile Values Cont.** | Locations

Jobs - Bibs	Jobs - Auth	Terminate Jobs
☒ Data Change	☒ Data Change	☒ Data Change
☒ Scan	☒ Scan	☒ Scan
☒ Index Only	☒ View Job History	☒ Index Only
☒ View Job History	☒ Remove MARC Files	☒ Auth Load
☒ Remove Log Files	☒ Remove Log Files	
☒ Remove MARC Files		

Jobs - MFHD	Jobs - Auth Load
☒ Data Change	☒ Load
☒ Scan	☒ View Job History
☒ View Job History	☒ Remove Log Files
☒ Remove Log Files	☒ Remove MARC Files
☒ Remove MARC Files	

Save Cancel

Figure 9-84. Profile Values Cont. Tab

- Select all the available locations

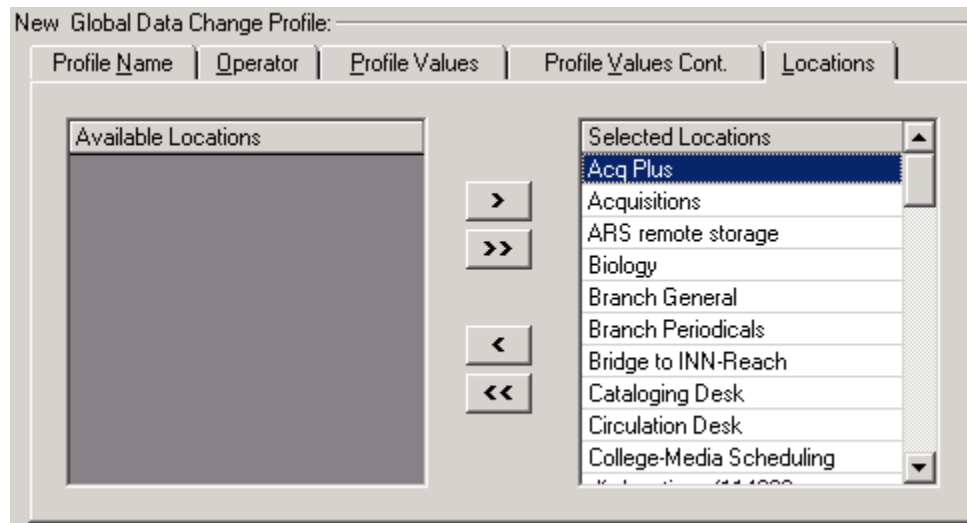


Figure 9-85. Locations Tab

To provide view access only for a specified operator(s):

- Clear all the check boxes on the Profile Values tab except for the ones labeled View
- Clear all the check boxes on the Profile Values Cont. tab

Other GDC Security Considerations

In addition to security profiles, you may consider using the custom selection option for installing Voyager clients and restrict which PCs have the GDC client installed on them.

Also, you should confirm that a recent backup of your database is available in the event that you need to do a restore.

Testing rules/changes with a limited number of records is prudent until you become more confident with the database changes that you plan to implement.

Security Options

In addition to the various security profiles, the Security listbar provides access to the Security Options workspace, which is used to configure password options and monitor invalid login attempts.

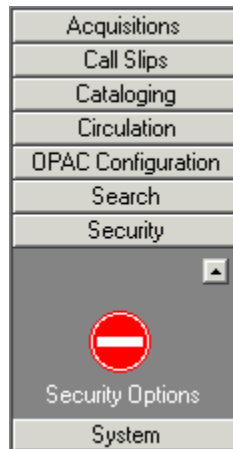


Figure 9-86. Security Listbar - Security Options

Configuring Password Options

The Password Requirements tabs (see [Figure 9-87](#) and [Figure 9-88](#)) allow you to configure password options (such as expiration settings, password length, character restrictions, and lockout restrictions).

In addition to the password expiration settings, you have the following options for individual staff operator accounts available through Operator Profiles:

- Set an account to never expire
- Set an account to immediately expire

See [Operator Profiles](#) on [page 9-15](#).

Security - Security Options

Password Options

☐ Password Requirements
 ☐ Password Requirements 2
 ☐ Invalid Login Attempts

New password cannot be same as previous: passwords

Minimum password age:

Maximum password age (expiration): days

Alert user days before password will expire

Password Length:

Minimum - at least:
 Maximum - at most:

Password may contain:

☒ User's Id

☒ User's name

Password must contain:

☒ All of the selected requirements

☐ At least of the requirements selected below

At least alphabetic character(s)

At least uppercase character(s)

At least lowercase character(s)

At least number character(s)

At least special character/symbol(s)

Special / symbols:

Figure 9-87. Security - Security Options (Password Requirements Tab)

[Table 9-21](#) describes the fields found on the **Password Requirements** tab of the **Security - Security Options** workspace.

Table 9-21. Password Requirements Tab

Field Name	Description	Reqd.	Type
New password cannot be the same as previous <x> of passwords	Indicates how many passwords must be used before users can use the same password again. The valid values for <x> are 0 - 99 passwords.	No	Spinner.
Minimum password age <x> <y>	Indicates the minimum amount of time that is required before users can change their passwords. The valid values for <x> are 0 - 99 and <y> are Hours or Days .	No	Spinner and drop-down list.

Table 9-21. Password Requirements Tab

Field Name	Description	Reqd.	Type
Maximum password age (expiration) <x> days	Indicates the maximum amount of time that is required before users must change their passwords. The valid values for <x> are 0 - 99 days.	No	Spinner.
Alert user <x> days before password will expire	Indicates how many days before passwords expire that an alert will be sent to users. The valid values for <x> are 0 - 99 days.	No	Spinner.
Password Length:			
Minimum - at least <x>	Indicates the minimum length of new passwords. The valid values for <x> are 8 - 99 characters.	Yes	Spinner.
Maximum Password Length <x>	Indicates the maximum length of new passwords. The valid values for <x> are 8 - 99 characters.	Yes	Spinner.
Password may contain			
User's ID	Indicates whether users are allowed to include their user IDs in their passwords.	No	Check box.
User's name	Indicates whether users are allowed to include their user names in their passwords.	No	Check box.
Password must contain			
All requirements below	Indicates that all requirements (see Requirements below) must be applied to new passwords.	No	Radio button.

Table 9-21. Password Requirements Tab

Field Name	Description	Reqd.	Type
At least <x> of the requirements selected below	Indicates the minimum number <x> of selected requirements (see Requirements below) that must be applied to new passwords. The valid values for <x> are 1 - 5.	No	Radio button and spinner.
Include requirement	Indicates whether the requirement (see Requirements below) should be applied to new passwords. NOTE: This check box displays next to each requirement only when the At least <x> of the requirements selected below is selected.	No	Check box
Requirements			
At least <x> alphabetic character(s)	Indicates the minimum number <x> of selected requirements (see Selected Requirements below) that must be applied to new passwords. The valid values for <x> are 0 - 5.	No	Spinner.
At least <x> upper-case character(s)	Indicates the minimum number <x> of uppercase characters that must be applied to new passwords. The valid values for <x> are 0 - 5.	No	Spinner.
At least <x> lower-case character(s)	Indicates the minimum number <x> of lowercase characters that must be applied to new passwords. The valid values for <x> are 0 - 5.	No	Spinner.

Table 9-21. Password Requirements Tab

Field Name	Description	Reqd.	Type
At least <x> number character(s)	Indicates the minimum number <x> of numeric characters that must be applied to new passwords. The valid values for <x> are 0 - 5.	No	Spinner.
At least <x> special character/symbol(s)	Indicates the minimum number <x> of special characters or symbols that must be applied to new passwords. The valid values for <x> are 0 - 5.	No	Spinner.
Special/symbols	Defines the list of valid special characters and symbols.	No	Text box.

The screenshot shows a dialog box titled "Security - Security Options". Inside, there is a tabbed interface with three tabs: "Password Requirements", "Password Requirements 2" (which is selected), and "Invalid Login Attempts". The "Password Requirements 2" tab contains the following settings:

- "Account will be locked after" is set to 3, followed by "invalid login attempts".
- "If locked out, the lockout period will be" is set to 3, followed by a dropdown menu showing "Minutes".
- "Account lockout counter will be reset after" is set to 1, followed by a dropdown menu showing "Minutes".
- Below these settings is a text area labeled "Enter text that will be shown on the change password screen:". The text area contains the following text:
Your new password must
- be a minimum of 8 and a maximum of 25 characters long
- be different from the previous 3 passwords

At the bottom of the dialog box are two buttons: "Save" and "Cancel".

Figure 9-88. Security - Security Options (Password Requirements 2 Tab)

[Table 9-22](#) describes the fields found on the **Password Requirements 2** tab of the **Security - Security Options** workspace.

Table 9-22. Password Requirements Tab

Field Name	Description	Reqd.	Type
Account will be locked after <x> invalid login attempts	Indicates how many invalid login attempts users will be allowed before their accounts are locked. The valid values for <x> are 0 - 99 attempts.	No	Radio button.
If locked out, the lockout period will be <x> <y>	Indicates the length of the lockout period if users attempt too many invalid login attempts. The valid values for <x> are 0 - 99 and <y> are Days, Hours, or Minutes .	No	Radio button.
Account lockout counter will be reset after <x> <y>	Indicates the length of time between invalid attempts before the lockout counter is reset to 0. The valid values for <x> are 0 - 99 and <y> are Days, Hours, or Minutes .	No	Radio button.
Enter text that will be shown on the change password screen	Defines the text that displays in the Change Password dialog box.	No	Text box

Monitoring Invalid Login Attempts

When the **Record invalid login attempts** check box is selected on the Invalid Login Attempts tab, the system will track and display each invalid login attempt in the tab.

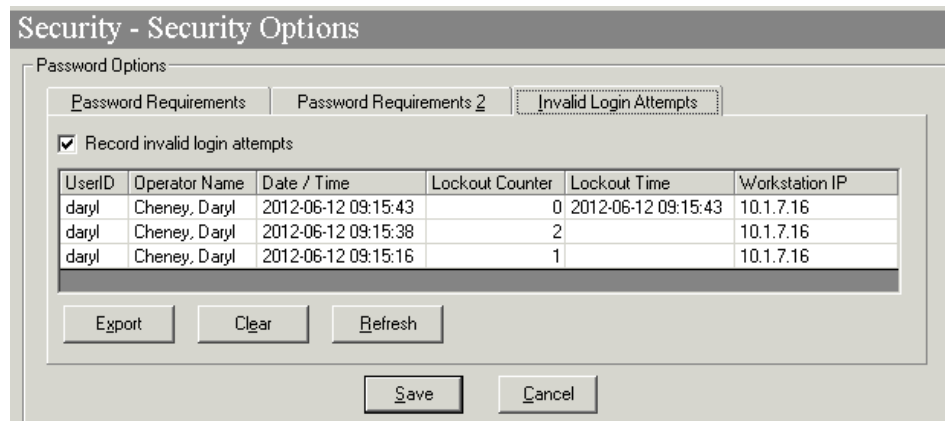


Figure 9-89. Security - Security Options (Invalid Login Attempts Tab)

On this tab, you can perform the following actions:

- Save the list of invalid login attempts to a CSV file by clicking the **Export** button.
- Clear the list of invalid login attempts by clicking the **Clear** button.
- Displays new invalid login attempts that may have occurred while the workspace was open by clicking the **Refresh** button.

Introduction

This chapter provides detailed descriptions of all of the essential data elements or building blocks that you must define in System Administration.

- Access Control Groups
- Base Currency
- Default Address
- Events
- Fines/Fees
- Item Types
- Locations
- Location Limit Groups
- Miscellaneous
- Owning Libraries
- Print Locations
- Statistical Categories

Access Control Groups

The **Access Control Groups** dialog box allows you to create, edit, and delete access groups (see [Figure 10-1](#)). Access groups provide a way for your institution to control access to nonpublic databases. Once you create an access group, it displays in the Available Access Groups list on the **Access Control** tab of the **Database Definitions** dialog box.

The new access group can then be associated with one or more nonpublic databases. See [Database Definitions](#) on [page 8-17](#) for more information about associating access groups with nonpublic databases.

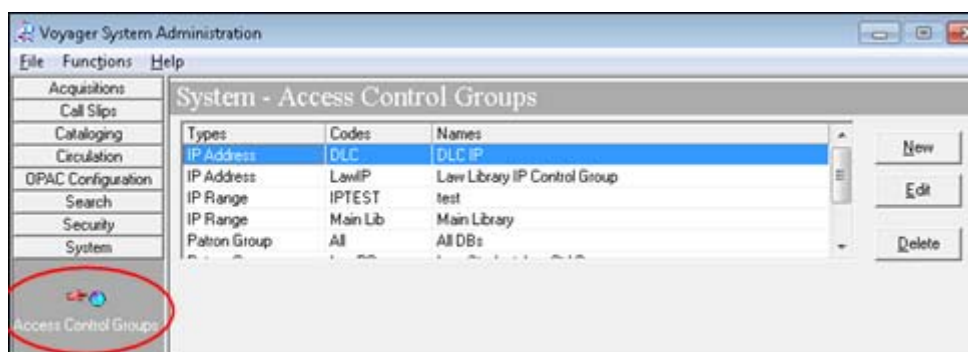


Figure 10-1. Access Control Groups

Access Control groups are also used by WebVoyage Holdings Sort Groups. For more information on WebVoyage Holdings Sort Groups, see [Holdings Sort Groups](#) on [page 7-9](#).

There are four types of access groups:

- Patron group
- IP address
- IP range
- Domain name

These four types of access groups can be broken down into two categories, patron-specific, and location-specific (see [Table 10-1](#)).

Patron-specific access groups define which nonpublic databases are available to patrons after logging into WebVoyage depending upon each patron's patron group. See "Patron Groups" for more information about Patron Groups.

Location-specific access groups define which nonpublic databases are available to patrons before logging into WebVoyáge depending upon the location of the computer that is being used.

Table 10-1. Access Groups

Access Group Type	Patron or Location Specific	Description
Patron group	Patron	You can select existing patron groups to be associated with this type of access group. After the access group has been saved, the access group can then be associated with one or more nonpublic databases in the Database Definitions activity. When a patron logs into WebVoyáge, any nonpublic databases associated with an access control group containing the patron's patron group is available to the patron.
IP address	Location	You can specify one or more individual IP addresses to be associated with this type of access group. After the access group has been saved, the access group can then be associated with one or more nonpublic databases in the Database Definitions activity. When a WebVoyáge client is launched from a computer having an IP address that matches an IP address associated with one or more access group, the nonpublic databases that those access groups have been associated with are available to anyone using that computer.
IP range	Location	An IP range is a continuous range of IP addresses that fall between a specified minimum and maximum IP address. You can specify one or more IP ranges to be associated with this type of access group. After the access group has been saved, the access group can then be associated with one or more nonpublic databases in the Database Definitions activity. When a WebVoyáge client is launched from a computer having an IP address that falls within an IP range associated with one or more access groups, the nonpublic databases that those access groups have been associated with are available to anyone using that computer.
Domain name	Location	You can specify one or more individual domain names to be associated with this type of access group. After the access group has been saved, the access group can then be associated with one or more nonpublic databases in the Database Definitions activity. When a WebVoyáge client is launched from a computer having a domain name that matches a domain name associated with one or more access groups, the nonpublic databases that those access groups have been associated with are available to anyone using that computer.

The Group Tab

The **Group** tab contains general information about the group, including the following:

- Group Code
- Group Name
- Group Type

The “control group type” tab

The second tab in the dialog box varies by group type, and corresponds to the group type chosen in the **Group Type** field on the **Group** tab. For example, if the access control group type is Patron Group, then the second tab on the Access Control Group's dialog box is **Patron Group** (see [Figure 10-2](#)).



Procedure 10-1. Adding or Editing an Access Group

Use the following to add or edit an access control group.

1. From the **System** menu on the Voyager System Administration side bar, click the **Access Control Groups** button.

Result: The Access Control Groups list opens (see [Figure 10-2](#)). The list box on the **Group** tab contains all of the existing access groups.

If you are...	Then...
Adding a new control group	click the New button

Result: The **New Access Control Group** dialog box opens (see [Figure 10-2](#)).

Editing an existing control group	click the Edit button

Result: The **Edit Access Control Group** dialog box opens.

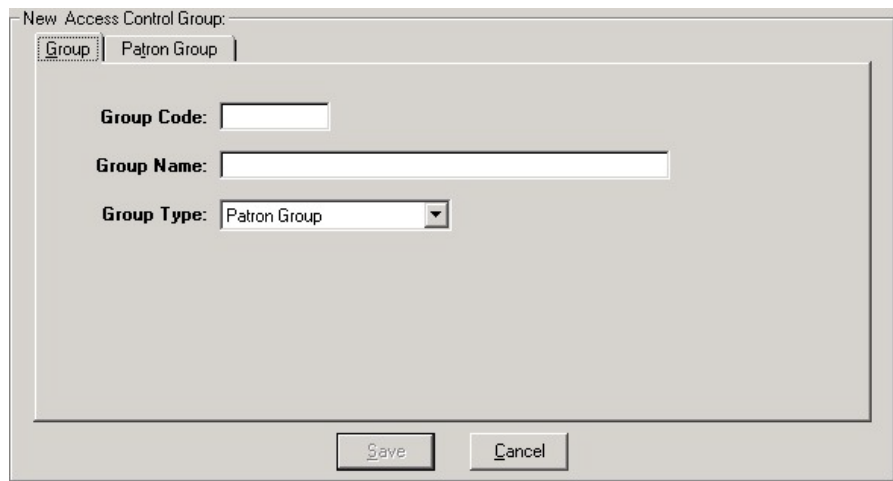
A screenshot of a software dialog box titled "New Access Control Group:". It features two tabs at the top: "Group" and "Patron Group". The "Group" tab is currently selected. Inside the dialog, there are three input fields: "Group Code:" with a text box, "Group Name:" with a text box, and "Group Type:" with a dropdown menu. The dropdown menu is currently set to "Patron Group". At the bottom right of the dialog, there are two buttons: "Save" and "Cancel".

Figure 10-2. Access Control Group Definitions dialog box

2. Enter a unique access group code in the **Access Group Code** field (no more than eight alphanumeric characters).
3. Enter a unique access group name in the **Access Group Name** field (no more than 40 alphanumeric characters). An access group code and access group name is required to uniquely identify each access group.
4. Select an access group type from the drop-down menu in the **Access Group Type** field. There are four types of access groups:
 - Patron group
 - IP address
 - IP range
 - Domain name

Result: The second tab on the **Access Control Group Definitions** dialog box changes to match the selected access group type.

If...	Then...
you selected Patron group	proceed to the Patron Groups tab on page 10-6
you selected IP address	proceed to the IP address tab on page 10-7

you selected IP range	proceed to the IP range Tab on page 10-8

you selected Domain name	proceed to the Domain Name tab on page 10-10

NOTE:

The Access Group Type cannot be changed once the access group has been saved to the database.

Patron Groups tab

The **Patron Groups** tab, [Figure 10-3](#), contains two lists, **Available patron groups** and **Selected patron groups**.

To move patron groups from the Available patron groups list to the Selected patron groups list, highlight one or more patron groups in the Available patron groups list and click the > button. To move all of the available patron groups to the Selected patron groups list, click the >> button.

To remove selected patron groups from the Selected patron groups list, highlight one or more patron groups in the Selected patron groups list and click the < button. To remove all of the selected patron groups from the Selected patron groups list, click << button.

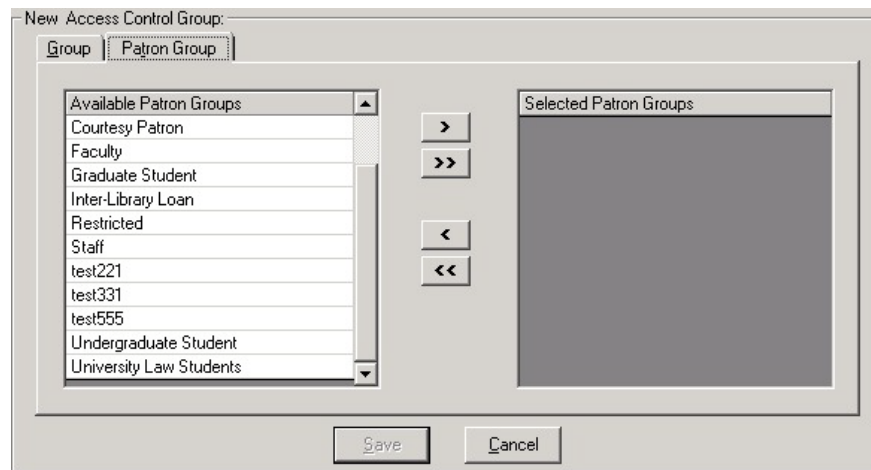


Figure 10-3. Access Control Group Definitions Dialog Box - Patron Groups Tab

IP address tab

If you selected **IP address** as the access control Group Type, click the **IP address** tab to associate one or more IP addresses with the access group.

The following buttons appear on the **IP address** tab:

- Edit IP Address
- Add IP Address
- Delete IP Address

At any time, you can edit or delete an existing IP address by selecting the IP address and then clicking the appropriate button, see [Figure 10-4](#).



Procedure 10-2. Adding or Editing an IP Address

Use the following to add or edit an IP address.

1. To add an IP address, click the **Add** button.

To modify an existing IP address, click the **Modify** button.

Result: The IP Address fields appear on the dialog box (see [Figure 10-4](#)).

2. Enter a valid IP address in the **IP Address** fields.
3. Click **OK** to add the IP address to the access group or click **Cancel** to abort the addition of the IP address.

Result: After you click **OK**, the IP address displays in the list box on the **IP address** tab. You can add as many IP addresses to an access group as you like. However, duplicate IP addresses are not allowed within a single access group.

NOTE:

An IP address or Internet Protocol address is made up of four groups of numbers each separated by a period such as 123.32.154.84. In order for an IP address to be valid, you must enter four groups of numbers and no group can exceed the number 255.

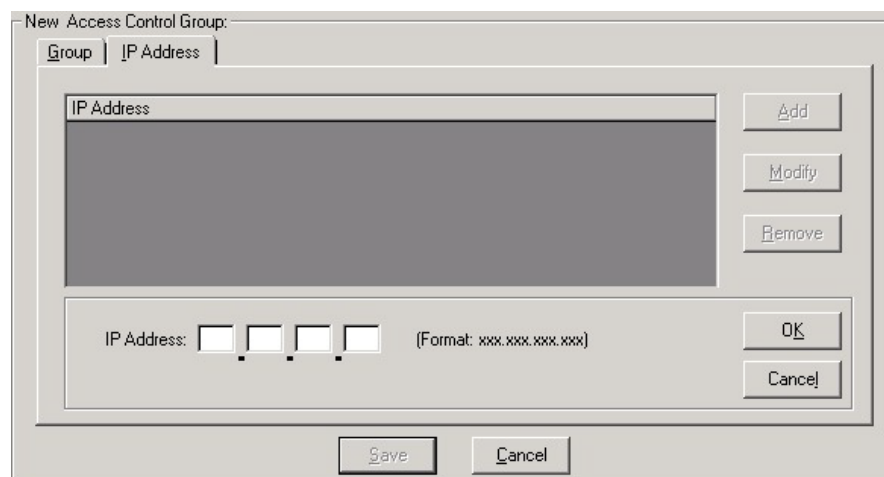


Figure 10-4. New IP Address Tab Including IP Address Field

IP range Tab

If you selected **IP range** as the Access Group Type, click the **IP range** tab to associate one or more IP address ranges to the access group. An IP range is a continuous range of IP addresses that fall between a specified minimum and maximum IP address.

The following buttons appear on the **IP range** tab:

- Edit IP Range
- Add IP Range
- Delete IP Range

At any time, you can edit or delete an existing IP range by selecting the IP range and then clicking the appropriate button, see [Figure 10-5](#).



Procedure 10-3. Adding or Editing an IP Range

Use the following to add or edit an IP range.

1. To add an IP range, click the **Add** button.

To modify an existing IP range, click the **Modify** button.

Result: The Minimum IP Address and Maximum IP Address fields appear on the dialog box (see [Figure 10-5](#)).

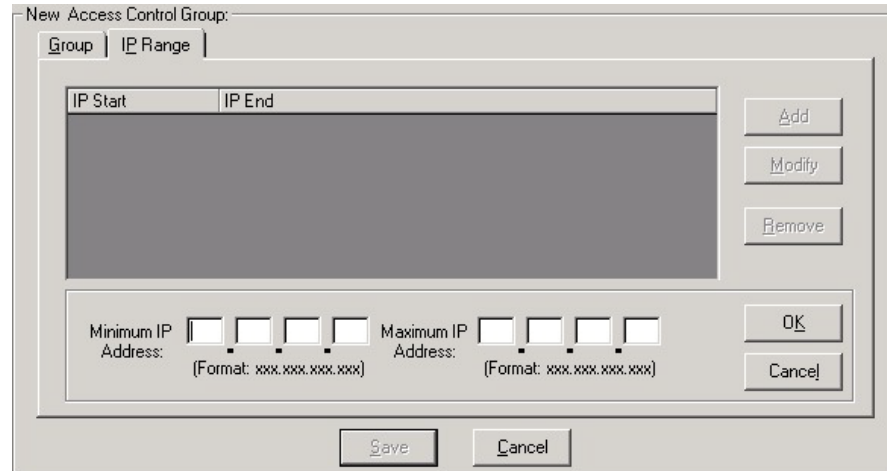


Figure 10-5. IP Range Tab Including Range Fields

2. Enter the minimum IP address in the **Minimum IP Address** field.
3. Enter the maximum IP address in the **Maximum IP Address** field.

Result: Any IP address that falls between the minimum and maximum IP addresses is considered part of the IP range.

4. Click **OK** to add the IP range to the access group or click **Cancel** to abort the addition of the IP range.

Result: After you click **OK**, the IP range displays in the list box on the IP range tab. You can create as many IP ranges as you like. However, overlapping ranges or duplicate ranges are not allowed within a single access group.

Domain Name tab

If you selected **Domain name** as the Access Group Type, click the **Domain name** tab to associate one or more domain names to the access group.

The following buttons appear on the **Domain Name** tab:

- Edit Domain Name
- Add Domain Name
- Delete Domain Name

At any time, you can edit or delete an existing domain name by selecting the domain name and then clicking the appropriate button; see [Figure 10-6](#).

NOTE:

A domain name is made up of segments called sub-domains. Each sub-domain is separated by a period such as in the domain name xxx.lib.edu, xxx and lib are sub-domains.

If you include only a partial domain name, any computer with that partial domain in its complete domain name (that is, as a sub domain) will match.

An example of a partial, less specific domain name that allows a larger amount of matching computers might be end.edu. In this case, any computer whose domain name ends with end.edu would match and be allowed access. An example of a specific domain name that greatly limits the amount of matching computers might be pr1.nrf.weeg.end.edu. In this case, only computers whose domain names include pr1.nrf.weeg.end.edu would match and be allowed access.



Procedure 10-4. Adding or Editing a Domain Name

Use the following to add or edit a domain name.

1. To add a domain name, click the **Add** button.

To modify an existing domain name, click the **Modify** button.

Result: The **Name** text box appears on the dialog box (see [Figure 10-6](#)).

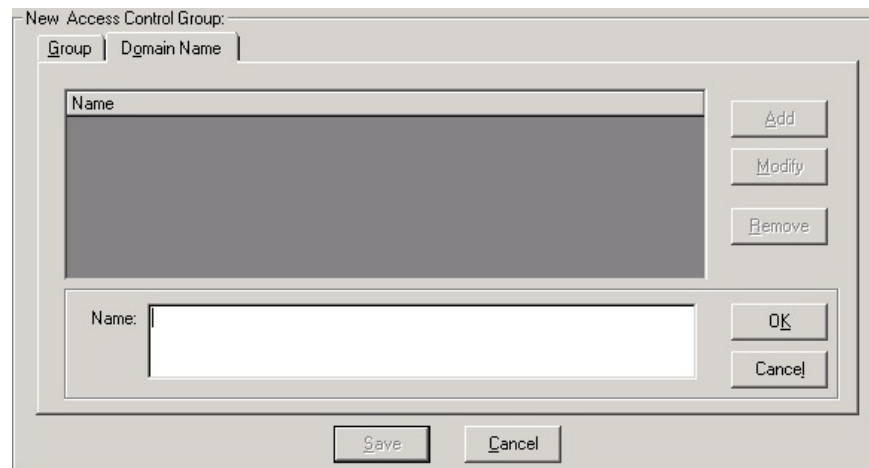


Figure 10-6. Access Control Group Definitions dialog box - Domain name tab

2. Enter a valid domain name in the **Name** field. You can enter the domain name of a single client computer to allow access to that computer alone, or you can enter the name of a larger domain to allow access to a larger group of computers.
3. Click **OK** to add the domain name to the access group or click **Cancel** to abort the addition of the domain name.

Result: The domain name displays in the list box on the **Domain Name** tab. You can create as many domain names as you like. However, duplicate domain names are not allowed within a single access group.

4. Click the **OK** button to save your information and close the **Access Control Group Definitions** dialog box.

Click the **Cancel** button next to the name field to close the **Name** field without saving.

5. Click the **Save** button to save your information and display the **Select Group** tab.

Click the **Cancel** button to close the **Access Control Group Definitions** dialog box without saving.



Procedure 10-5. Deleting an Access Group

Use the following to delete an access group.

1. Select an access group from the list of existing access groups and click the **Delete Access Group** button. The confirmation message Delete this Access Control Group? displays. If you want to continue with the deletion of the specified access control group, click **Yes**. If you want to cancel the deletion of the specified access control group, click **No**.
-

Base Currency

The Base Currency

- determines the currency used in your fund records.
- is the currency to which all foreign currencies entered in purchase orders and invoices are converted before postings are made to your fund records.
- is the currency for reflecting item prices in the system.
- is the currency used for patrons' fines/fees and payments.

You must define one Base Currency.



IMPORTANT:

Consult with your Project Manager to define your base currency if your site is in the implementation process.

If you need to edit the Base Currency information contact Customer Support because this affects many records in the system.

Security

Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked are able to access the **System - Base Currency** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Base Currency Workspace

[Figure 10-7](#) displays the **System - Base Currency** workspace.

When first entering the **System - Base Currency** workspace, the top half opens with the Base Currency that is already defined.

The default Base Currency is U.S. Dollar; contact your Engagement Consultant or Customer Support to change this currency.

Figure 10-7. System - Base Currency Workspace

Field Descriptions

[Table 10-2](#) provides names, descriptions, if required, and type and range requirements for the fields in the **System - Base Currency** workspace.

Table 10-2. Fields in the System - Base Currency Workspace

Name	Description	Required	Type and Range
Country Name	The name of the country that uses the currency.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.

Table 10-2. Fields in the System - Base Currency Workspace

Name	Description	Required	Type and Range
Currency Name	The name of the currency. For example: • U.S. Dollar • Euro	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.
Currency Code	A applicable three-letter code for this currency For example: • usd • frf	Yes	Administrators may use the codes provided in <i>Codes for the Representation of Currencies and Funds</i> , ISO 4217, distributed by the American National Standards Institute.
Base Decimals	The number of decimal places used by the base currency. For U.S. dollar, use 2.	Yes	Numerics only.
Decimal Delimiter	The delimiter this currency uses. For U.S. dollar, use a period (.)	Yes	

Creating/Editing the Base Currency

This section provides step-by-step instructions on how to edit the Base Currency in the System section of the System Administration module.

**IMPORTANT:**

Contact your Engagement Consultant or Customer Support when creating or editing your Base currency.



Procedure 10-6. Creating/Editing the Base Currency

Use the following to create/edit the Base Currency.

1. Access the System Administration module's **System - Base Currency** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Base Currency** button in the System listbar.

Result: The **System - Base Currency** workspace opens.

2. Enter the name of the country to which the currency belongs in the **Country Name** field.
3. Enter a Currency Name in the **Currency Name** field.
4. Enter a Currency Code in the **Currency Code** field.
5. Enter the Base Decimals in the **Base Decimals** field.
6. Enter the Decimal Delimiter in the **Decimal Delimited** field.
7. Click **Save** to save the information, click **Cancel** to return to the **System** workspace

Result: If saved, the system saves the Base Currency.

Deleting the Base Currency

Sites may not delete the base currency.

Default Address

This is where sites define an address for their institution. It is the database name that displays in WebVoyage.

You must enter one Default Address. This is necessary in case an individual location has no defined address and one is needed for a print program such as the location is being used as a ship-to address in a purchase order.

If all locations can use this address, it is not necessary to enter addresses for individual locations (unless you want to do so). See [Locations](#) on [page 10-39](#) for information on locations and their addresses.

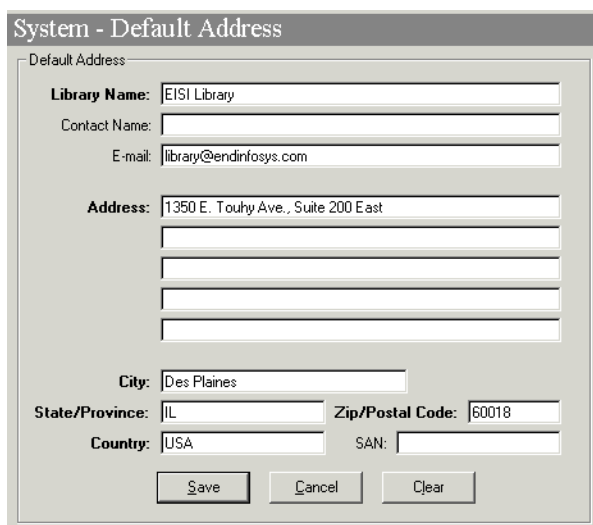
Security

Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **System - Default Address** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Default Address Workspace

Creating and editing the Default Address is done in the **System - Default Address** workspace.

When entering the **System - Default Address** workspace (see [Figure 10-8](#)), it shows the library name, contact info, and default address if defined.



The screenshot shows a web form titled "System - Default Address". Below the title is a section labeled "Default Address" containing several input fields. The "Library Name" field is populated with "EISI Library". The "Contact Name" field is empty. The "E-mail" field is populated with "library@endinfosys.com". The "Address" field is populated with "1350 E. Touhy Ave., Suite 200 East" and has three additional empty lines below it. The "City" field is populated with "Des Plaines". The "State/Province" field is populated with "IL". The "Zip/Postal Code" field is populated with "60018". The "Country" field is populated with "USA". There is also a "SAN" field which is empty. At the bottom of the form are three buttons: "Save", "Cancel", and "Clear".

Figure 10-8. System - Default Address Workspace

Field Descriptions

[Table 10-3](#) provides names, descriptions, if required, and type and range requirements for the fields in the **System - Default Address** workspace.

Table 10-3. Fields in the System - Default Address Workspace

Name	Description	Required	Type and Range
Library Name	A name that applies to all of the libraries that your Voyager installation serves. This is also the name that displays when a user selects Local Catalog in Web-Voyage. For example: - University Library System - Main Library	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 50 characters.
Contact Name	This contact name will be used as a default on acquisitions and circulation notices. For example: Main Office	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 50 characters.
E-Mail	This is the default e-mail address.	No	50 characters.
Address (5 lines)	The address to be used as a default on acquisitions and circulation notices.	Yes You must enter data on at least the first line of the address.	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 50 characters per line.
City	Name of the city used in the default address.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 30 characters.

Table 10-3. Fields in the System - Default Address Workspace

Name	Description	Required	Type and Range
State / Province	Name of the state/province used in the default address.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 7 characters.
Zip / Postal Code	Zip code or postal code of the city used in the default address.	Yes	Numeric. 10 characters.
Country	Name of the country used in the default address. Users may use the codes provided in <i>Codes for the Representation of Names of Countries</i> , ISO/ANSI/NISO 3166, distributed by the American National Standards Institute.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 20 characters.
SAN (Standard Address Number)	In the U.S., SANs are assigned by R. R. Bowker. Most SANs are eight characters but two-character prefixes are sometimes used.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 10 characters.

Creating a Default Address

This section provides step-by-step instructions on how to create a Default Address in the System section of the System Administration module.



Procedure 10-7. Creating a Default Address

Use the following to create a Default Address.

1. Access the System Administration module's **System - Default Address** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Default Address** button in the System listbar.

Result: The **System - Default Address** workspace opens.

2. Enter the Library name in the **Library name** field.
3. Enter a contact name if wanted.
4. Enter an E-mail address if wanted.
5. Enter street address information beginning on the first **Address** line field.
6. Enter the city in the **City** field.
7. Enter the State or Province in the **State/Province** field.
8. Enter a zip or postal code in the **Zip/Postal Code** field.
9. Enter the country in the **Country** field.
10. Enter the SAN if wanted.
11. Click **Save** to save the information, click **Cancel** to return to the **System** workspace

Result: If saved, the system returns to the **System - Default Address** workspace and the new Default Address displays in the list of Default Address.

Editing a Default Address

This section provides step-by-step instructions on how to edit a Default Address in the System section of the System Administration module.

Sites may edit Default Address.



Procedure 10-8. Editing a Default Address

Use the following to edit a Default Address.

1. Access the System Administration module's **System - Default Address** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Default Address** button in the System listbar.

Result: The **System - Default Address** workspace opens.

2. Highlight the Default Address to be edited.
3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the system returns to the **System - Default Address** workspace and the Default Address has been edited.

Deleting a Default Address

Sites may not delete the Default Address.

Events

The purpose of the System - Events options is to provide the capability to the system administrator to selectively enable the system to record additional information such as the following for certain events:

- Date
- Time
- Count by location and item type
- Count by location
- Count by title
- Count by classification

For the steps to enable this capability, see [Procedure 10-9, Enabling a System Event](#), on page [10-21](#).

This additional information augments the reporting capability in Microsoft Access and Cognos Analyzer.

Voyager provides the following System - Events options:

- BROWSE - Historical Browse
- UBBROWSE - UB Item Received at Pickup Location

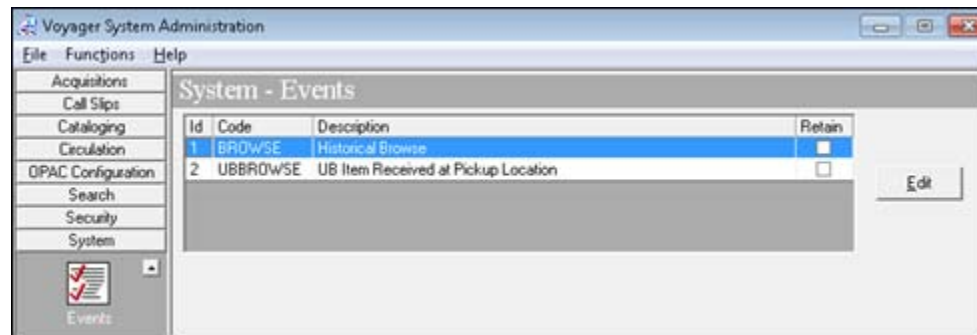


Figure 10-9. BROWSE and UBBROWSE Options

When you enable BROWSE and/or UBBROWSE, additional data is recorded to enhance your reporting statistics of patron browse activity locally and via UB transactions (when no checkout action has been processed).

Enabling a System Event

This section describes the steps for enabling a system event in the System section of the System Administration module.



Procedure 10-9. Enabling a System Event

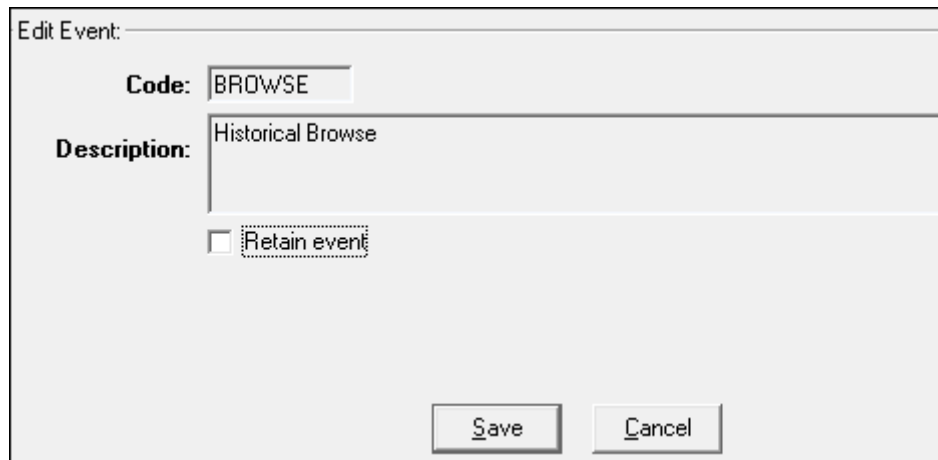
Use the following to enable a system event.

1. Access the System Administration module's **System - Events** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Events** button in the System listbar.

Result: The **System - Events** workspace opens.

2. Select (highlight) one of the events from the list.
3. Click the **Edit** button.

Result: The **Edit Event** workspace displays.



Edit Event:

Code: BROWSE

Description: Historical Browse

☐ Retain event

Save Cancel

Figure 10-10. Edit Event

4. Select **Retain event** and click **Save**.
-

Fine/Fees

In this section, you can define:

- Fine/fee reasons
This refers to a penalty fine or a service/product fee that you assess against patrons.
- Payment types
This defines what forms of payment are accepted by your library when you collect fines/fees from your patrons and post payments in the Voyager circulation module.
- Posting types
This identifies the posting types that are:
 - System provided
 - Uniquely created for your institution

Security

Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **System - Fines/Fees** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Fines/Fees Workspace

Creating, editing, and deleting Fines/Fees reasons and Payment types is done in the **System - Fines/Fees** workspace.

The **System - Fines/Fees** workspace contains the **Fine Fee** and **Payment** tabs.

When first entering the **System - Fines/Fees** workspace, the top half opens (see [Figure 10-11](#)). It opens to the **Fine Fee** tab and shows the names of any fine or fee reasons already defined.

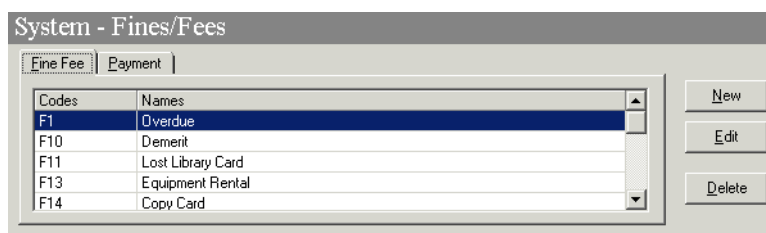


Figure 10-11. System - Fines/Fees Workspace, Fine Fee Tab

Fine Fee Tab

Using the **Fine Fee** tab, sites can define new fine and fee reasons. There is no limit on the number of fine/fee reasons you can define.

The following Fine/Fee Reasons are system-defined and cannot be changed or deleted:

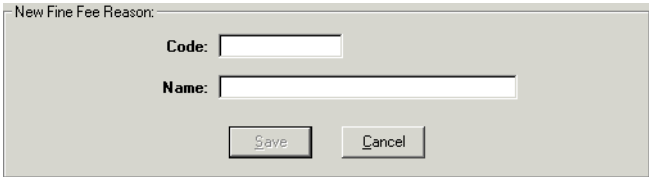
- Overdue Fine
- Lost Item Replacement Cost
- Lost Item Processing Fee

- Media Booking Late Charge
- Media Booking Usage Fee
- Equipment Replacement
- Lost Equipment Processing
- Accrued Fine
- Accrued Demerit
- Demerit

These Fine/Fee Reasons are used for automatic processing by the system (assuming that your circulation policies impose these charges on at least one Patron Group. See [Circulation Policy Definitions](#) on [page 5-54](#) for more information).

There is no limit on the number of Fine/Fee Reasons you can define. You do not have to add any more Fine/Fee Reasons. The system-supplied reasons appear on the list in the System Administration module even though you cannot change or delete them and even if you do not assess any fines or fees against any patron. Fine/fee reasons are available for Media Scheduling.

After clicking either the **New** or **Edit** buttons, the bottom half of the **System - Fines/Fees** workspace, **Fine Fee** tab opens (see [Figure 10-12](#)). In this example, the fields are blank because the **New** button was selected.



The screenshot shows a dialog box titled "New Fine Fee Reason:". Inside the dialog, there are two text input fields. The first is labeled "Code:" and the second is labeled "Name:". Both fields are currently empty. Below these fields, there are two buttons: "Save" and "Cancel".

Figure 10-12. Fine/Fee Reasons section of the Fines Fees tab

Field Descriptions

[Table 10-4](#) provides names, descriptions, if required, and type and range requirements for the fields on the **Fine Fee** tab of the **System - Fines/Fees** workspace.

Table 10-4. Fields on the Fine Fee tab of the System - Fines/Fees Workspace

Name	Description	Required	Type and Range
[Fine/Fee Reason] Code	Fine Fee Reason code	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 10 characters.
[Fine Fee Reason] Name	Fine Fee reason name. These Fine/Fee Reasons will display in A-Z lists to operators who manually create fine/fee records for patron penalties and fees. For example: • Database Search • Photocopying • Room Rental • AV Rental • Miscellaneous	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.

Creating a Fine or Fee Reason

This section provides step-by-step instructions on how to create a Fine or Fee Reason in the System section of the System Administration module.

You can add new Fine/Fee Reasons at any time.



Procedure 10-10. Creating a Fine or Fee Reason

Use the following to create a Fine or Fee Reason.

1. Access the System Administration module's **System - Fines/Fees** workspace.

- a. Click **System** in the listbar.
- b. Click the **Fines/Fees** button in the System listbar.

Result: The **System - Fines/Fees** workspace opens to the **Fine Fee** tab.

2. Click the **New** button.
3. Enter the code for your Fine/Fee Reason in the **Code** field.
4. Enter the name of your Fine Fee Reason in the **Name** field.
5. Click **Save** to save the information, click **Cancel** to return to the **System** workspace.

Result: If saved, the system returns to the **System - Fines/Fees** workspace and the new Fines/Fee Reason displays in the list.

Editing a Fine or Fee Reason

This section provides step-by-step instructions on how to edit a Fine or Fee Reason in the System section of the System Administration module.

You can edit the codes on the system supplied fine/fee codes. On user-defined fine/fee reasons you can edit the code and name.

You can change any information about some of the existing Fine/Fee Reason; this change will be reflected throughout the system.

You cannot change the system-supplied Fine/Fee Reasons.



Procedure 10-11. Editing a Fine or Fee Reason

Use the following to edit a Fines Fee Reason.

1. Access the System Administration module's **System - Fines/Fees** workspace and perform the following:
 - a. Click **System** in the listbar.
 - b. Click the **Fines/Fees** button in the System listbar.

Result: The **System - Fines/Fees** workspace opens.

2. Highlight the Fine Fee to be edited.

3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the system returns to the **System - Fines/Fees** workspace and the Fine Fee has been edited.

Deleting a Fine or Fee Reason

This section provides step-by-step instructions on how to delete a Fine or Fee Reason in the System section of the System Administration module.

You cannot delete the system-supplied Fine Fee Reasons. Sites may delete other Fine Fee Reasons.

However, once a Fine/Fee Reason has been used to assess a charge to a patron, that Fine/Fee Reason cannot be deleted until all such fine/fee charges (paid and unpaid) have been purged from the system.



Procedure 10-12. Deleting a Fine or Fee Reason

Use the following to delete a Fine or Fee Reason.

1. Access the System Administration module's **System - Fines/Fees** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Fines/Fees** button in the System listbar.

Result: The **System - Fines/Fees** workspace opens.

2. Highlight the Fines Fee Reason to be deleted.
3. Click the **Delete** button.

Result: The **Delete Fines/Fees** dialog box opens asking for confirmation of the deletion (see [Figure 10-13](#)).

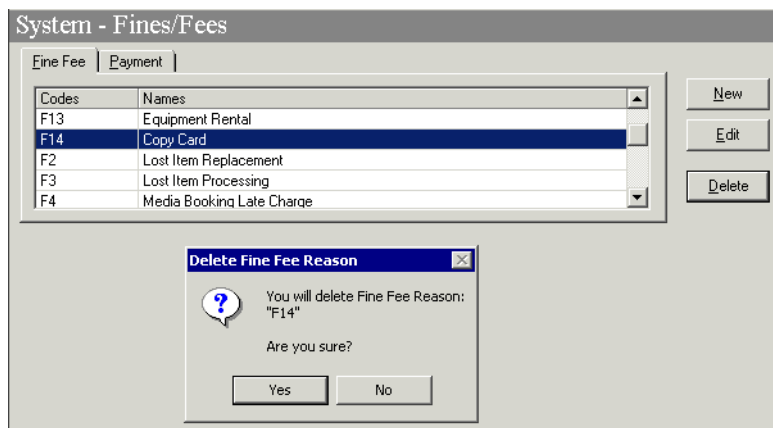


Figure 10-13. Delete Fines/Fees confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Fine or Fee Reason.

Result: If deleted, the system returns to the **System - Fines/Fees** workspace and the Fines/Fee reason is immediately removed from the listing of Fines/Fee names.

Payment Tab

Using the **Payment** tab, you can define Payment types. That is, the forms of payment that are accepted when you collect fines/fees from your patrons and post payments in the Voyager circulation module.

If you do not accept payments using Voyager circulation, you do not need to define any Payment types.

The following Payment types may not be edited or deleted:

- Cash
- Check

Any other payment types may be edited or deleted, for example Debit/Credit card.

[Figure 10-14](#) shows the **Payment** tab.

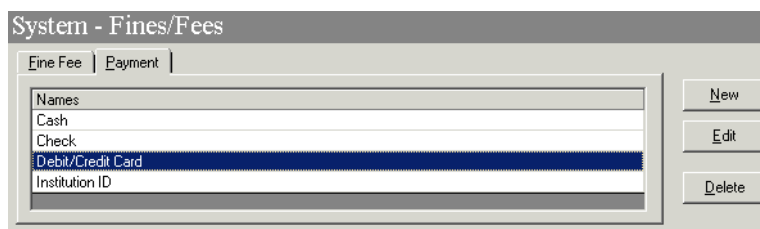


Figure 10-14. System - Fines/Fees Workspace, Payment Tab

After clicking either the **New** or **Edit** buttons, the bottom half of the **System - Fines/Fees** workspace, **Payment** tab opens (see [Figure 10-15](#)). In this example, the field is blank because the **New** button was selected.

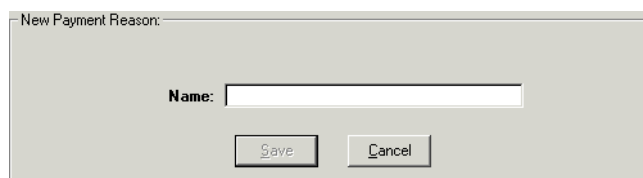


Figure 10-15. Payment Reason section of the Payment tab

Field Descriptions

[Table 10-5](#) provides name, description, if required, and type and range requirements for the field on the **Payment** tab of the **System - Fines/Fees** workspace.

Table 10-5. Fields on the Payment tab of the System - Fines/Fees Workspace

Name	Description	Required	Type and Range
[Fine/Fee Reason] Name	Name of the Payment type. Be as specific as you want, for example, if you accept credit cards, you could define each credit card as a separate Payment Type, or you could just define Credit Card.	Define additional Payment Types if needed only if you post payments for fines/fees using Voyager circulation.	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.

Creating a Payment Type

This section provides step-by-step instructions on how to create a Payment Type in the System section of the System Administration module.

You can add new Payment Types at any time.



Procedure 10-13. Creating a Payment Type

Use the following to create a Payment Type.

1. Access the System Administration module's **System - Fines/Fees** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Fines/Fees** button in the System listbar.

Result: The **System - Fines/Fees** workspace opens to the **Fine Fee** tab.

2. Click the **Payment** tab.
3. Click the **New** button.
4. Enter the Payment Type into the **Name** field.
5. Click **Save** to save the information or click **Cancel** to return to the **System** workspace.

Result: If saved, the system returns to the **System - Fines/Fees** workspace and the new Payment Type displays in the list.

Editing a Payment Type

This section provides step-by-step instructions on how to edit a Payment Type in the System section of the System Administration module.

You can change any or all information about any of the existing Payment Types, but if you do, that change will be reflected throughout the system.

You cannot change the system-supplied Payment Types.



Procedure 10-14. Editing a Payment Type

Use the following to edit a Payment Type.

1. Access the System Administration module's **System - Fines/Fees** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Fines/Fees** button in the System listbar.

Result: The **System - Fines/Fees** workspace opens.

2. Click the **Payment** tab.
3. Highlight the Payment Type to be edited.
4. Click the **Edit** button.
5. Edit the name if wanted.
6. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the change.

Result: If saved, the system returns to the **System - Fines/Fees** workspace and the Payment Type has been edited.

Deleting a Payment Type

This section provides step-by-step instructions on how to delete a Payment Type in the System section of the System Administration module.

You cannot delete the system-supplied Payment Types.



Procedure 10-15. Deleting a Payment Type

Use the following to delete a Payment Type.

1. Access the System Administration module's **System - Fines/Fees** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Fines/Fees** button in the System listbar.

Result: The **System - Fines/Fees** workspace opens.

2. Click the **Payment** tab.
3. Highlight the Payment Type to be deleted.
4. Click the **Delete** button.

Result: The **Delete Payment** dialog box opens asking for confirmation of the deletion (see [Figure 10-16](#)).

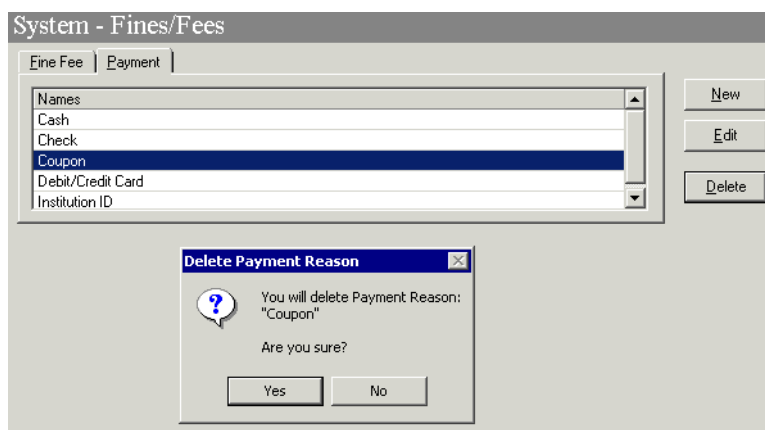


Figure 10-16. Delete Payment confirmation

5. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Payment Type.

Result: If deleted, the system returns to the **System - Fines/Fees** workspace and the Payment Type is immediately removed from the listing of names.

Posting Tab

Use the Posting tab to view the complete list of posting types (including the system-provided types) and create/manage your site-specific posting types.

The system-provided posting types are:

- Batch Forgive
- Bursar Refund

- Bursar Refund-Transferred
- Bursar Transfer
- E-Kiosk
- Error
- Forgive
- Payment
- Refund
- Suspension

NOTE:

Some of the system-provided posting types that display in System Administration on the Posting tab are not available in the Circulation client. These serve other purposes. System processes use the bursar transfer posting type, for example.

To access the Posting tab, click the **Fines/Fees** icon located in the System component of the System Administration listbar and click the tab labeled Posting. See [Figure 10-17](#).

The screenshot shows a software window titled "System - Fines/Fees". It has three tabs: "Fine Fee", "Payment", and "Posting", with "Posting" being the active tab. On the left, there is a list box labeled "Names" containing the following items: "Batch Forgive" (highlighted in blue), "Bursar Refund", "Bursar Refund-Transferred", "Bursar Transfer", and "E-Kiosk". To the right of this list are three buttons: "New", "Edit", and "Delete". Below the list box is a section titled "New Posting Type:". Inside this section, there is a "Use Posting Type For:" label followed by two checkboxes: "Fines" (checked) and "Demerits" (checked). Below these checkboxes is a "Name:" label followed by an empty text input field. At the bottom of this section are two buttons: "Save" and "Cancel".

Figure 10-17. Posting Tab

To create a new posting type, enter the name (up to 25 characters) and specify that if it is for Fines, Demerits, or both (using the check boxes), and click Save.

Use the Edit and Delete buttons to manage your site-specific posting types.

NOTE:

You may not edit or delete the system-provided posting types.

Item Types

An Item Type refers to kinds of materials owned by a library that are important to distinguish for purposes of identification or circulation.



CAUTION:

Do not enter any Item Type information until after your database load is complete.

Item Types are used for many purposes.

- An Item Type is stored in an item record as part of the identification process.
- An Item Type is one of the elements determining circulation policy.
- Item Types have default replacement values that are used for lost item processing when the **Price** field of the item record is blank.

Security

Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **System - Item Types** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Item Types Workspace

Item Types are defined in the **System - Item Types** workspace (see [Figure 10-18](#)).

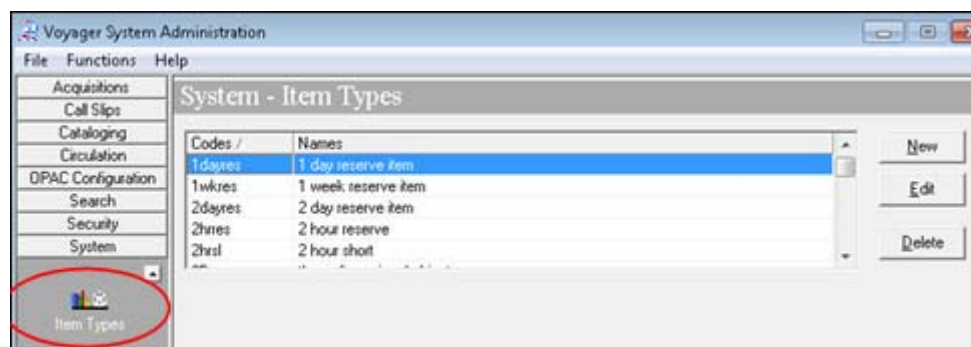


Figure 10-18. System - Item Types Workspace

[Table 10-6](#) describes the **System - Item Types** workspace.

Table 10-6. System - Item Types options

Option	Description	Type
[Item Type] Code	Item Type codes are stored and displayed in records seen by library staff.	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 10 characters.
[Item Type] Name	Any category of material that you would treat distinctly for circulation purposes should be defined as an Item Type. For example, items at your reference locations may be non-circulating as a rule, but faculty members may borrow a Reference Item Type from a reference location for a 48-hour period. 2-Hour Course Reserve is another example. These Item Types display in A-Z lists to operators who must assign one Item Type for each item record they create. You should define Item Types that are clearly recognizable to staff working with these records to promote consistency and enhance database quality. Since default replacement values are defined for Item Types, you should also consider this factor when you discuss which Item Types you need.	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.

Table 10-6. System - Item Types options

Option	Description	Type
Display Name	This functionality is not enabled.	

Creating an Item Type

This section provides step-by-step instructions on how to create an Item Type in the System section of the System Administration module.

There is no limit on the number of Item Types you can define. You can always add new Item Types.



Procedure 10-16. Creating an Item Type

Use the following to create an Item Type.

1. Access the System Administration module's **System - Item Types** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Item Types** button in the System listbar.

Result: The **System - Item Types** workspace opens.

2. Click the **New** button.
3. Enter the **Code**, **Name**, and **Display Name**.

Result: This completes the definition of an item type.

4. Click **Save** or click **Cancel**.

Result: This saves or cancels the **New Item Type**.

Editing Item Types

This section provides step-by-step instructions on how to edit Item Types in the System section of the System Administration module.

NOTE:

Operators may use the Pick and Scan feature to merge item types. See the *Voyager Cataloging User's Guide* for more information.

At any point after your database load, you may change any or all information on Item Types or add new ones. If you change an Item Type, that change is reflected throughout the database wherever that information is used.

However, once you use an Item Type in an item record, you cannot delete it from the System Administration module.



Procedure 10-17. Editing an Item Type

Use the following to edit Item Types.

1. Access the System Administration module's **System - Item Types** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Item Types** button in the System listbar.

Result: The **System - Item Types** workspace opens.

2. Highlight the Item Type to be edited, and click **Edit**.

Result: The **Edit Item Type** dialog box opens.

3. Enter any new information in the fields you want to modify.

Result: The Item Type is modified to match your preferences.

4. Click **Save** or click **Cancel**.

Result: This saves or cancels the **Item Type**.

Deleting an Item Type

This section provides step-by-step instructions on how to delete an Item Type in the System section of the System Administration module.

Sites can delete any Item Type if it is no longer in use in any item records.



Procedure 10-18. Deleting an Item Type

Use the following to delete an Item Type.

1. Access the System Administration module's **System - Item Types** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Item Types** button in the System listbar.

Result: The **System - Item Types** workspace opens.

2. Highlight the Item Type to be deleted, and click **Delete**.

Result: The **Delete Item Types** dialog box opens requiring confirmation of the deletion (see [Figure 10-19](#)).

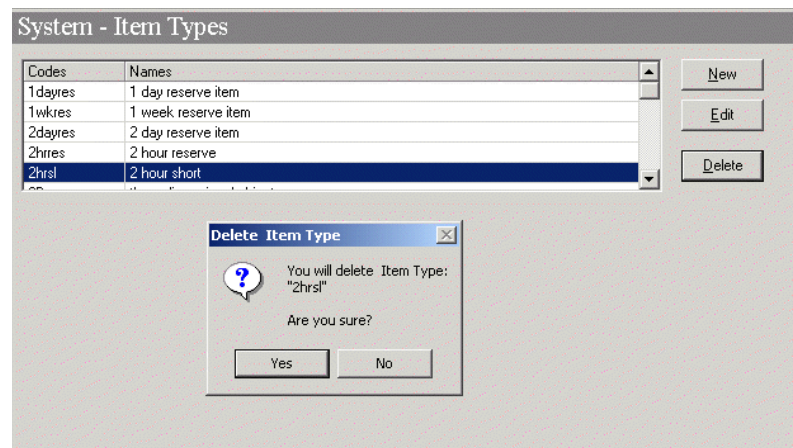


Figure 10-19. Delete Item Types confirmation

3. Click **Yes** or click **No**.

Result: Selecting **Yes** confirms your deletion request and processes the deletion. Selecting **No** cancels your deletion request.

Locations

The ability of an operator to work in the modules with items is based on locations. Locations are the foundation of the Voyager system and they serve the following critical functions:

- Define where the work gets done, that is a happening location.
- Define where items reside, that is a storage location.
- Limit access, thereby serving as a security mechanism.

In the System Administration module locations are created, linked to the Acquisitions, Cataloging, and Circulation modules via policy groups, and linked to security profiles to govern operator access.

Happening Locations

Happening locations are your library's work locations. These locations include:

- Acquisitions units
- Cataloging areas
- Circulation desks

Once a location has been created in the System Administration module, **System - Locations** workspace, it can be defined as a happening location for the Acquisitions, Cataloging, and/or Circulation module. Making a location a happening location occurs in the System Administration module, **Acquisitions, Cataloging, and/or Circulation - Policy Definitions** workspaces.

Acquisitions Happening Location

Acquisition units are where ordering, claiming, paying, and receiving activities occur. [Figure 10-20](#) shows the **Acquisitions - Policy Definitions** workspace where Acquisition happening locations are defined. See [Acquisitions - Policy Definitions Workspace](#) on [page 2-43](#) for more information.

When you create a Purchase Order, the order/claim/pay location you selected in the acquisitions policy determines the purchase order site.

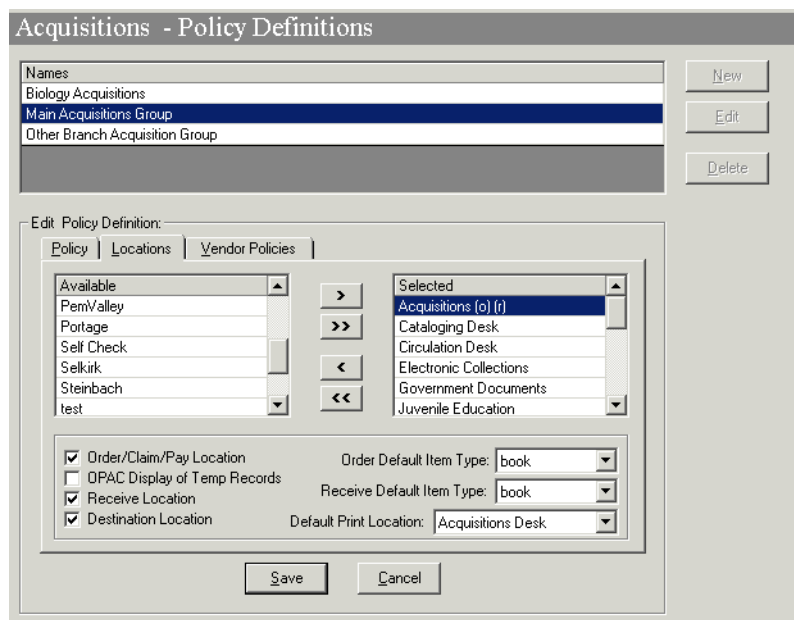


Figure 10-20. Acquisitions - Policy Definitions, Acquisitions happening location

Cataloging Happening Location

Cataloging desks are where cataloging activity occurs. [Figure 10-21](#) shows the **Cataloging - Policy Definitions** workspace where Cataloging happening locations are defined. See [Policy Definitions](#) on [page 4-98](#) for more information.

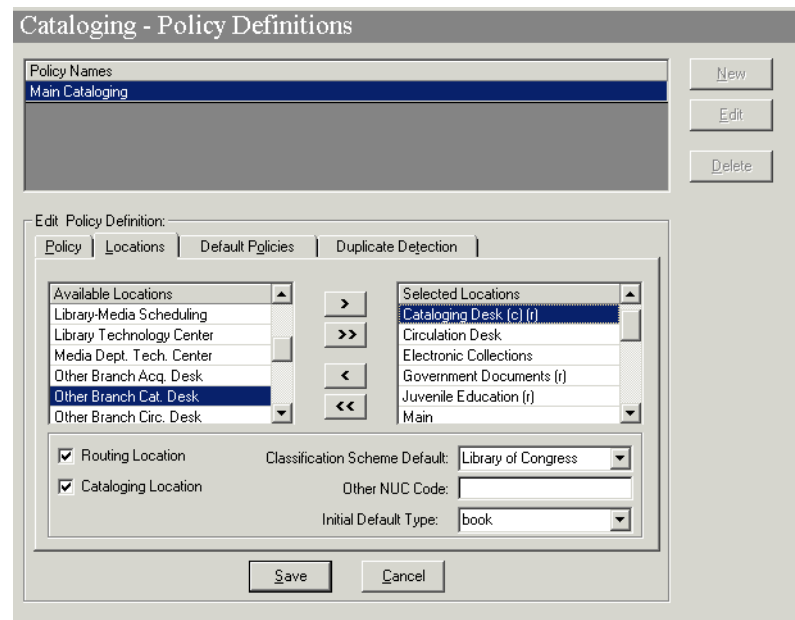


Figure 10-21. Cataloging - Policy Definitions, Cataloging happening location

Circulation Happening Location

Circulation desks are where circulation activity such as, charging, renewing, requesting, and discharging occurs. [Figure 10-22](#) shows the **Circulation - Policy Definitions** workspace where Circulation happening locations are defined. See [Circulation Policy Definition Workspace](#) on [page 5-55](#) for more information.

Circulation - Policy Definitions

Names

- Main Circ Group
- Media Scheduling Group
- Other Branch Circ Group
- Reserve Circ Group

New Edit Delete

Edit Policy Definition:

Policy Definition Locations Policies Calendar Patrons Items Matrix Short Loan Matrix

Available: Media Dept. Tech. Center

Selected: Circulation Desk (c) (p), Electronic Collections

Location Settings

Settings Alerts

Default Location: Circulation Desk Default Item Type: book

Default Print Location: Circulation Desk ☐ Automated Storage

☒ Circulation Location

☒ Collect Fines ☐ Due Date Slip Print ☐ OPAC Suppress for Item on the Fly

☒ Courtesy Discharge ☐ Hold Slip Print ☐ Discharge Receipt Print

☐ Routing Slip Print ☐ Payment Receipt Print

☒ Pick Up Location

Shelving Interval: 1 Hours In Transit Interval: 0 Days

Hold Life: 5 Days Recall Life: 5 Days

OK Cancel

Figure 10-22. Circulation - Policy Definitions, Circulation happening location

With multiple libraries, consortia, and branches that use a centralized System Administration module, sites can distinguish among the various locations through their naming conventions. For example, use initials at the beginning of each name so that the locations display together within the modules. For Main library locations, use M-circulation, M-acquisitions, and M-cataloging.

Storage (Shelving) Locations

A storage location is where materials are stored in the library, such as stacks, reference, off-site storage, rare books room, and so forth.

During your data load at implementation, storage locations are created in the system based on a mapping file. After the load, sites create their happening locations and can add additional storage locations as necessary.

Names of Storage Locations

There are several names used to denote storage locations. Storage locations are also called holdings, permanent (shelving), temporary (shelving), destination, and intended locations.

- The holdings location is used in the MARC Format for Holdings Data (MFHD), [Figure 10-23](#), and it populates the **Location** field on the item record, [Figure 10-24](#).

Tag	I1	I2	Subfield Data
014	1		\$a CNV02434005
852	0		\$b main \$h ND2133 \$i .N3

Figure 10-23. MFHD storage location

- The permanent location, in the item record, is the item's shelving location, providing there is no temporary location. [Figure 10-24](#) shows an item record with the item's permanent location and temporary location.

The screenshot shows a window titled "Item 24199 for holding 22706". The window contains the following fields and controls:

- Title:** Water-color painting is fun / prepared for the National Recreation Assn. by Frank A. Staples.
- Location:** Main
- Call #:** ND2133.N3
- Barcode:** 42968
- Temp. Loc.:** Juvenile Education (dropdown menu)
- Perm. Loc.:** Main (dropdown menu)
- Temp. Type:** (dropdown menu)
- Item Type:** book (dropdown menu)
- Media Type:** (dropdown menu)
- Enum:** (text field)
- Chron:** (text field)
- Year:** (text field)
- Caption:** (text field)
- Free text:** (text field)
- Spine:** (text field)
- Copy:** 0
- Pieces:** 1
- Price:** \$0.00

At the bottom left, there are three icons: a bar chart, a pie chart, and a document with a red X. At the bottom right, there are three text fields labeled "Copy:", "Pieces:", and "Price:" with values 0, 1, and \$0.00 respectively.

Figure 10-24. Item Record's Perm.[anent] and Temp.[orary] locations

- The temporary location in the item record is the item's shelving location; see [Figure 10-24](#). The temporary location is used when an item temporarily moves to another location, such as course reserves.
- The destination location is a storage location that is used as an intended location for ordering purposes. To define a location as an intended location, the **Destination Location** check box on the **Locations** tab in the **Acquisitions - Policy Definitions** workspace must be checked; see [Figure 10-25](#).

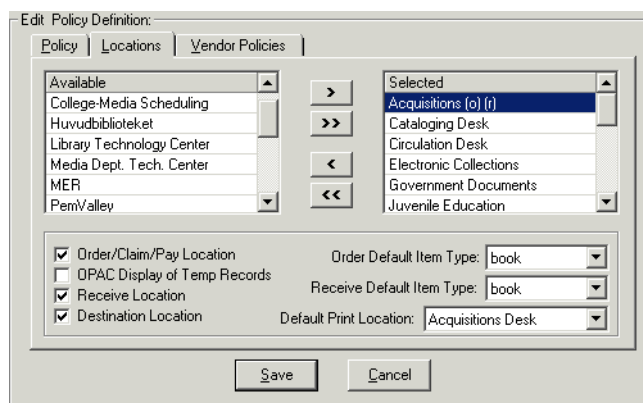


Figure 10-25. Acquisitions - Policy Definitions, Destination Location check box

- An intended location is a storage location for which Acquisitions operators may order materials. The intended locations drop-down menu, used when adding line items to a Purchase Order (PO), is populated by the locations defined as Destination Locations, as shown in [Figure 10-26](#). You must identify the location as a destination before you can order for that location in the Acquisitions module. The PO's intended location determines the list of ledgers that are available for selection.

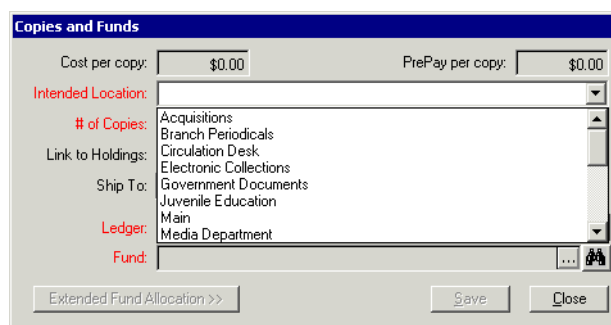


Figure 10-26. Intended location for the PO line item

When locations cover multiple buildings or institutions, you can incorporate them into the location's name. For example, the main library's locations could be M-stacks, M-reference, and M-archive. The law library could be L-stacks, L-reference, and L-archive.

Locations and Security

Once a location is created in the **System - Locations** workspace, it can be linked to an operator profile, and thereby, linked to operators. This linkage determines whether the operator will have access to that location or the items that reside at that location. This linking occurs in the **Security - Acquisitions/Serials, Cataloging and/or Circulation Profiles** workspaces. See [Locations and Security](#) on [page 9-9](#) for more information.

Creating Locations

This section describes how to create (add) a location.



CAUTION:

Do not enter any location information until after your database load is complete. The data load creates storage locations based on your mapping file. The data load does not work properly if locations exist in the system prior to the database load. After the load you may add your happening locations.

Creating a new location is done in the System Administration module using the **System - Locations** workspace.

Security

Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **System - Locations** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Locations Workspace

Creating, editing, and deleting Locations is done in the **System - Locations** workspace.

When first entering the **System - Locations** workspace, the top half opens (see [Figure 10-27](#)). It shows the names of any Locations already defined.

System - Locations			
Codes	Names	Owning Library	
Bacq	Other Branch Acq. Desk	Training Master DB	New Edit Delete
Bcat	Other Branch Cat. Desk	Branch Library	
Bcirc	Other Branch Circ. Desk	Branch Library	
Bgen	Branch General	Branch Library	
biology	Biology	Law Library	

Figure 10-27. System - Locations Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **System - Locations** workspace opens (see [Figure 10-28](#)). In this example, the fields are blank because the **New** button was selected.

System - Locations			
Codes	Names	Owning Library	
Bacq	Other Branch Acq. Desk	Training Master DB	New Edit Delete
Bcat	Other Branch Cat. Desk	Branch Library	
Bcirc	Other Branch Circ. Desk	Branch Library	
Bgen	Branch General	Branch Library	
biology	Biology	Law Library	

New Location:

Code:

Name:

Spine Label Name:

OPAC Display Name:

Owning Library: ☐ Suppress in OPAC

Policies

Current Cataloging Policy Group:

Current Acquisition/Serials Policy Group:

Current Circulation Policy Group:

Address

Save

Cancel

Figure 10-28. New Location section

Field Descriptions

[Table 10-7](#) provides names, descriptions, if required, and type and range requirements for the fields in the **System - Locations** workspace.

Table 10-7. Fields in the System - Locations Workspace

Name	Description	Required	Type and Range
[Location] Code	The system stores Location Codes to display location information in MARC holdings records (used for an item's permanent home location) and in item records (used for an item's permanent or temporary home location). The code must be unique. For example: • Main • Legal • Reserves	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 10 characters. NOTE: Although this is part of the MARC record is uses the Latin-1 character set.
[Location] Name	Voyager clients display Location Names in A-Z drop-down lists in staff modules, so using a common prefix helps group related locations. This is especially useful if your Voyager system contains data from multiple, physically distinct collections. Unless you define a Location OPAC (WebVoyage) Display Name, the Location Name displays in WebVoyage. For example: • Main Library • Law - Case Reporters	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.
Spine Label Name	Enter a spine label name if you print locations on spine labels. If left blank, only call numbers print on spine labels. Multiple locations may share the same Spine Label Name. For example: • MAIN • LAW	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.

Table 10-7. Fields in the System - Locations Workspace

Name	Description	Required	Type and Range
OPAC Display Name	If left blank, the system automatically uses the Location Name. OPAC display names (names that display in WebVoyage) are often helpful if you want to give more specific location information to your patrons, such as items at this location are non-circulating. You can use the same Location OPAC Display Name for different locations if you need to distinguish locations for staff but not patrons. That is, different location codes in staff records display the same Location OPAC Display Name to patrons. Notice that for some locations, the examples use floor information. Since the MARC holdings or item record stores only the location code, the system merely points to a display name and uses whatever it finds. This means you can change the Location OPAC Display Name without changing Location Codes.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 60 characters.
Owning Library	Owning library to which this location is associated. See Owning Libraries on page 10-74 for information on defining owning libraries	Yes	Select from the drop-down list.

Table 10-7. Fields in the System - Locations Workspace

Name	Description	Required	Type and Range
Suppress in OPAC	If you do not want items at this location to display in WebVoyage, select it. Any OPAC Display Name that you define does not apply. This is not retroactive. Suppressing a location does not retroactively suppress holdings records assigned to that location. This option only impacts new holding records (MFHDs). You must manually suppress existing MFHDs through the Cataloging module. (See the <i>Voyager Cataloging User's Guide</i>.) If you are cataloging restricted or classified materials and you want them automatically suppressed from WebVoyage display, you should only assign them to those locations where this value is selected. You can also suppress individual records from WebVoyage display on a record-by-record basis. If an item is temporarily housed in a staff department, you still probably want it displayed in WebVoyage with an accurate location.	No	Check box The default is unchecked.
Policies: Current Cataloging Policy Group	The Policies section displays the Cataloging Policy Group associated with the selected location.		
Policies: Current Acquisitions/Serials Policy Group	The Policies section displays the Acquisitions/Serials Policy Group associated with the selected location.		
Policies: Current Circulation Policy Group	The Policies section displays the Circulation Policy Group associated with the selected location.		
Address button	When checked, the Address information for this location displays in the System Address dialog box. See System Address Dialog box on page 10-51. Once a location code and name are provided, the Address button becomes active.		Button

System Address Dialog box

For each location, you can define a different physical address. If all your locations are within one building or you have centralized receiving, you may be able to use the default address; see [Default Address](#) on [page 10-15](#). However, if locations and their addresses differ from the default address, define an address for each of those locations.

**IMPORTANT:**

You need an address for circulation happening locations so that the address prints on the overdue notices.

The system uses the following location addresses for printing:

- Ship to address on purchase orders
- Bill to address on purchase orders
- Addresses on Acquisitions notices
- Addresses on circulation notices such as the pick-up location for an item being held for a patron.
- E-mail addresses

If you enter no address information and the system needs an address for the location, it uses the Default Address, see [Default Address](#) on [page 10-15](#).

NOTE:

You must enter an address if you want to enter phone numbers for a location.

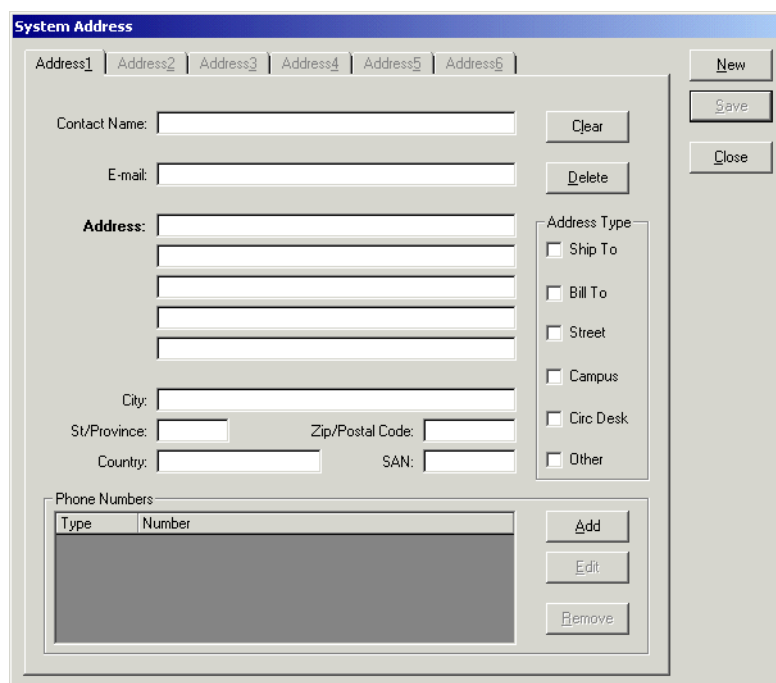
You can have up to six addresses for a location.

An address type can be assigned to only one address for the selected location, but the location's address can function as more than one address type.

**IMPORTANT:**

If you enter only one address for a location, all six address types apply by default (all check boxes are selected).

[Figure 10-29](#) shows the **System Address** dialog box.



The **System Address** dialog box is used to manage address information for a location. It features a tabbed interface at the top with tabs labeled Address1 through Address6. The main area contains several input fields: Contact Name, E-mail, Address (a multi-line text area), City, St/Province, Zip/Postal Code, Country, and SAN. To the right of the Address field is an **Address Type** section with checkboxes for Ship To, Bill To, Street, Campus, Circ Desk, and Other. Below the main input fields is a **Phone Numbers** section containing a table with columns Type and Number, and buttons Add, Edit, and Remove. On the far right, there are buttons for New, Save, and Close. A Clear button is located next to the Contact Name field, and a Delete button is next to the E-mail field.

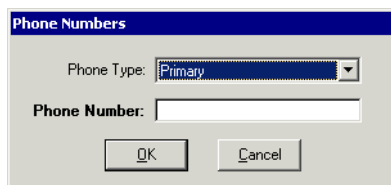
Figure 10-29. System Address dialog box for a location

Phone Numbers Dialog box

Telephone number information for this location is added and edited using the **Phone Numbers** dialog box after clicking the **Add** button in the Phone Numbers section. [Figure 10-30](#) shows the **Phone Numbers** dialog box.

NOTE:

Telephone numbers do not print on purchase orders.



The **Phone Numbers** dialog box is used to add or edit telephone number information. It contains a **Phone Type** dropdown menu with 'Primary' selected, a **Phone Number** text input field, and **OK** and **Cancel** buttons at the bottom.

Figure 10-30. Phone Numbers dialog box

Field Descriptions

[Table 10-8](#) provides names, descriptions, if required, and type and range requirements for the fields in the **System Address** dialog box and **Phone Numbers** dialog box.

Table 10-8. Fields in the System Address dialog box

Name	Description	Required	Type and Range
Address Type section			
Ship To Address	Address on the purchase order. The address displays for all locations in the acquisitions policy. If not filled in on the PO, the order site's ship to address is used. Ship to at line item permits drop-shipment on one PO and tracks and pays on one order.	No	Check box. The default is unchecked.
Bill To Address	Billing address for the purchase order. This address may be different from the ship to address. The address is linked to the order/claim/pay locations in the acquisitions policy. In acquisitions, if no bill to address is selected, the address defaults to the bill to address for the order site.	No	Check box. The default is unchecked.
Street Address	Links the address to the circulation policy. Must be checked for the address to print on overdue slips.	No	Check box. The default is unchecked.
Campus Address	Links the address to the acquisitions/serials policy. If the location has a campus address, it prints on the routing list. Serials can be routed to locations as well as patrons	No	Check box. The default is unchecked.
Circ Desk Address	Links the address to the circulation policy. Address that prints on holds and recalls.	No	Check box. The default is unchecked.

Table 10-8. Fields in the System Address dialog box

Name	Description	Required	Type and Range
Other	An extra repository for any address you may need for other purposes. Some institutions use this address for campus administration offices or registrar's office.	No	Check box. The default is unchecked.
Address section			
Contact Name	The name that prints on the return address.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 50 characters.
E-mail	Links the address to the circulation policy. You can mail overdue notices via E-mail. This is the E-mail address that patrons would use to respond.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 50 characters.
Address	Physical address of this location.	Yes You must enter data on at least the first line of the address.	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 50 characters.
City	Name of this city for this location.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 30 characters.
St[ate]/Province	Name of this state or province for this location.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 7 characters.

Table 10-8. Fields in the System Address dialog box

Name	Description	Required	Type and Range
Zip/Postal Code	Zip code or postal code for this location.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 10 characters.
Country	Name of the country for this location. Users may use the codes provided in <i>Codes for the Representation of Names of Countries</i> , ISO/ANSI/NISO 3166, distributed by the American National Standards Institute.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 20 characters.
SAN	In the U.S., SANs are assigned by R. R. Bowker. Most SANs are eight characters but two-character prefixes are sometimes used.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 10 characters.
Clear Button	When clicked, it clears the data from the address tab.		Button
Delete Button	Deletes the address		Button
Phone Numbers section			
Phone Number Type	Type of phone number. • Primary • Mobile • Fax • Other For each location's address, you may enter as many phone numbers of any listed type as you need.	No	Select from the drop-down menu.

Table 10-8. Fields in the System Address dialog box

Name	Description	Required	Type and Range
Phone Number	Phone number for this location.	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters



Procedure 10-19. Creating a New Location

Use the following to create a Location.

1. Access the System Administration module's **System - Locations** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Locations** button in the System listbar.

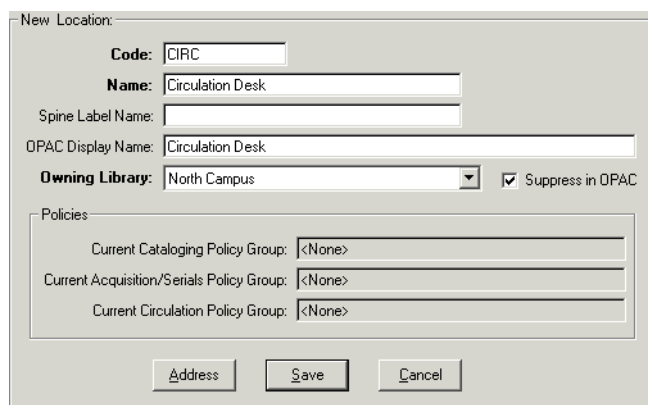
Result: The **System - Locations** workspace opens.

2. Click the **New** button.
3. Enter the code for your location in the **Code** field.
4. Enter the name for your location in the **Name** field.
5. Enter the Spine Label Name for your location in the **Spine Label Name** field.
6. Enter the OPAC Display Name for your location in the **OPAC Display Name** field.
7. Select an Owning Library from the drop-down menu in the **Owning Library** field, if your site uses Owning Libraries.
8. Check the **Suppress in OPAC** check box if wanted.

NOTE:

The policies section will be populated when/if the location is selected in the module's policy group.

Result: [Figure 10-31](#) shows an example of the New Location section with the fields completed.



New Location:

Code: CIRC

Name: Circulation Desk

Spine Label Name:

OPAC Display Name: Circulation Desk

Owning Library: North Campus ☒ Suppress in OPAC

Policies:

Current Cataloging Policy Group: <None>

Current Acquisition/Serials Policy Group: <None>

Current Circulation Policy Group: <None>

Buttons: Address, Save, Cancel

Figure 10-31. Example of a completed New Location section

9. Click **Save** to save the information, click **Address** to provide the address information or click **Cancel** to return to the **System - Locations** workspace.

Result: If saved, the system returns to the **System - Locations** workspace and the new Location displays in the list of Locations.

If canceled the system returns to the **System - Locations** workspace without adding the new location.

If the operator selected the **Address** button, a message alerting the operator that before proceeding the location will be saved displays ([Figure 10-32](#)) and asks the operator if they want to continue.

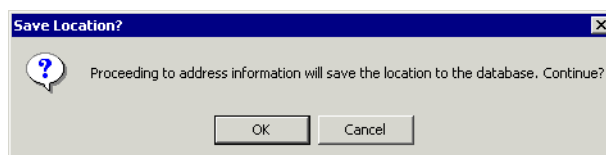


Figure 10-32. Warning that location will be saved message

Click **OK** to continue to provide address information.

10. Add the address information.
 - a. Enter the contact name in the **Contact Name** field.
 - b. Enter the E-mail address in the **E-mail** field.
 - c. Enter the Address in the **Address** fields.
 - d. Enter the City in the **City** field.
 - e. Enter the State or Province in the **St/Province** field.
 - f. Enter the Zip or Postal code in the **Zip/Postal code** field.
 - g. Enter the Country in the **Country** field.
 - h. Enter the SAN in the **SAN** field.
11. Check the appropriate Address Type check box, in the **Address Type** section.
12. Add the phone number information if you want.
 - a. Click the **Add** button in the Phone Numbers section to display the **Phone Numbers** dialog box.
 - b. Select the type of phone number from the **Phone Type** field.
 - c. Enter the phone number in the **Phone Number** field.
 - d. Click the **OK** button to add the phone number or click the **Cancel** button if you do not want to add the phone number.

Result: If the operator clicked **OK**, the phone number information displays in the Phone Number section.

[Figure 10-33](#) shows an example of a completed **System Address** dialog box, with phone number information included.

System Address

Address1 | Address2 | Address3 | Address4 | Address5 | Address6

Contact Name:

E-mail:

Address:

City:

St/Province: Zip/Postal Code:

Country: SAN:

Address Type

☐ Ship To
☐ Bill To
☐ Street
☐ Campus
☐ Circ Desk
☐ Other

Phone Numbers

Type	Number
Primary	800-296-2200

Figure 10-33. Example of a completed System Address dialog box

- Click the **Save** button to save the address information.

Result: The system returns to the **System - Locations** workspace.

Enabling the Use of a New Location

Because of the interconnections between locations and the modules, after adding a new location in the System Administration module, there are four additional configurations to allow use of that location in the modules.

After the location has been created in the System Administration module using the **System - Locations** workspace

1. Add the location in the System Administration module Security Profiles for Acquisitions/Serials, Cataloging, and Circulation operators
2. Add it to the appropriate Master Security profile. This needs to be done only when configuring circulation. The locations being configured must be in the configurer's Master Profile).
3. Add the location to the appropriate Policy Groups, Acquisitions, Cataloging, and/or Circulation in System Administration module using the **Acquisitions, Cataloging, and/or Circulation - Policy Definitions** workspaces.
4. Add the location to ledger(s) in the Acquisitions module.

Adding the Location to the Module specific Security Profiles

When you add a new location, you must add the location to the appropriate security profiles so that staff can access and use the new location within the module.

See [Acquisition/Serials Profiles - Creating, Editing, and Deleting](#) on [page 9-43](#), [Cataloging Profiles - Creating, Editing, and Deleting](#) on [page 9-59](#), and [Circulation Profiles - Creating, Editing, and Deleting](#) on [page 9-77](#).

Adding the Location to Master Security Profiles - Circulation only

Master Profiles provide secured access to System Administration module menus. Add the new location to the appropriate Master Profile.

See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#) for more information.

Adding the Location to Policy Groups

After a location is created, you can select it for a policy group. Locations can be added to the following groups: an Acquisitions, Cataloging, and/or Circulation Policy Group. However, a location can only belong to one: Acquisitions, Cataloging, and/or Circulation Policy Group.

See [Locations Tab](#) on [page 2-45](#) for information on adding a location to an Acquisitions Policy Group. If you do not add the new location to an Acquisitions/Serials policy group, you *cannot* use the location as an intended location, an order site, a bill to location in a purchase order, or a ledger location.

See [Policy Definitions](#) on [page 4-98](#) for information on adding a location to a Cataloging Policy Group. If you plan to catalog items for the new location, you must add it to a cataloging policy group.

See [Locations Tab](#) on [page 5-58](#) for information on adding a location to a Circulation Policy Group. If you do not add the new location to the circulation policy group, a charge/renew, hold/recall, and call slip will require operator overrides.

Adding the Location to a Ledger

When you add a new location, add it to appropriate ledgers if you need to order materials for the new location.

See the *Voyager Acquisitions User's Guide* for information on adding a location to a Ledger.

Editing a Location

This section provides step-by-step instructions on how to edit a Location in the **System - Locations** workspace of the System Administration module.



IMPORTANT:

Do not change any location information until after your database load.

At any point after your database load, you may change any or all information (except for Location Code) for any or all locations or add new ones.

If you change a Location Name or Location OPAC Display Name, that change is reflected throughout the database wherever that information is used. However, it is not reflected in existing holdings records in the 852 subfield b.



Procedure 10-20. Editing a Location

Use the following to edit a Location.

1. Access the System Administration module's **System - Locations** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Locations** button in the System listbar.

Result: The **System - Locations** workspace opens.

2. Highlight the Location to be edited.
3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the system returns to the **System - Locations** workspace and the Location has been edited.

NOTE:

Use Voyager's Pick and Scan functionality to merge locations for items. See The *Voyager Cataloging User's Guide*.

Deleting a Location

This section provides step-by-step instructions on how to delete a Location in the System section of the System Administration module.



IMPORTANT:

Once you have entered a Location code in a MARC holdings (MFHD) or item record, you cannot delete that location from the System Administration module unless all records that use the location are deleted first or unless the location is changed in all applicable records.

If you try to delete a location with associated holdings records you receive the This location cannot be deleted because it is being used in a holdings record. warning message (see [Figure 10-34](#)).

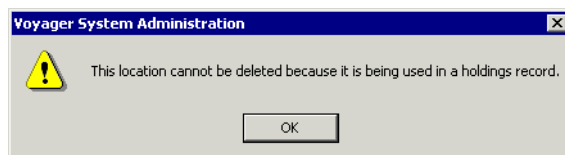


Figure 10-34. Unable to delete location message

NOTE:

Deleting a location can take several minutes. Modify the `voyager.ini` file's `Timeout=` value if needed. See the *Voyager Technical User's Guide* for more information.

**Procedure 10-21. Deleting a Location**

Use the following to delete a Location.

1. Access the System Administration module's **System - Locations** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Locations** button in the System listbar.

Result: The **System - Locations** workspace opens.

2. Highlight the Location to be deleted.
3. Click the **Delete** button.

Result: The dialog box opens warning the operator that the deletion may take a long time (see [Figure 10-35](#)).

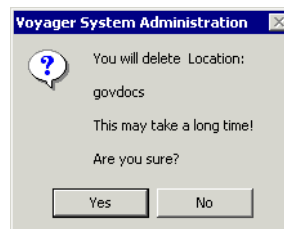


Figure 10-35. Message when deleting a location

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Location.

Result: If deleted, the system returns to the **System - Locations** workspace and the Location is immediately removed from the listing of Locations.

Additional uses of Locations

Locations may also be added to the following:

- Location Limit Groups, this confines a search previously defined groups of locations.
 - Call Slip Rules and Print Groups.
 - Request Groups, to include the new location in a request group for holds, recalls, and call slip.
 - OPAC holdings sort groups.
-

Location Limit Groups

The Location Limit Groups option allows you to limit WebVoyage searching to a specific group of locations. Only titles with an 852b that has an attached MFHD with the specified location in it will display.

Example:

If a bibliographic record has two MFHDs in two different locations, one location in limit group A and the other in limit group B, and a search is done in WebVoyage with the limit group A applied, the bibliographic record is retrieved and displays both MFHDs including the one whose location belongs to limit group B. Therefore, as long as one of the MFHDs belongs to a location included in the limit group, the bibliographic record and all of its MFHDs are retrieved in a search.

Creating Location Limit Groups

This section provides step-by-step instructions on how to create a Location Limit Group in the System section of the System Administration module.

There is no limit on the number of Location Limit Groups you can define. Location Limit Groups can be created at any time.

A Location Limit Group does not require a location assignment. However if a group does not have any locations assigned, the group should probably be suppressed in WebVoyage and staff searching since the group has no function. Locations can belong to zero, one, or many location groups.

NOTE:

You can have a maximum of 802 locations in the Location Limit Groups list.



Procedure 10-22. Creating or Editing Location Limit Groups

Use the following to create or edit a Location Limit Group.

1. Click **System** on the listbar in Voyager System Administration.

Result: The Voyager **System** options display in the vertical listbar area.

2. Click **Location Limit Groups**.

Result: The **System - Location Limit Groups** dialog box opens. See [Figure 10-36](#).

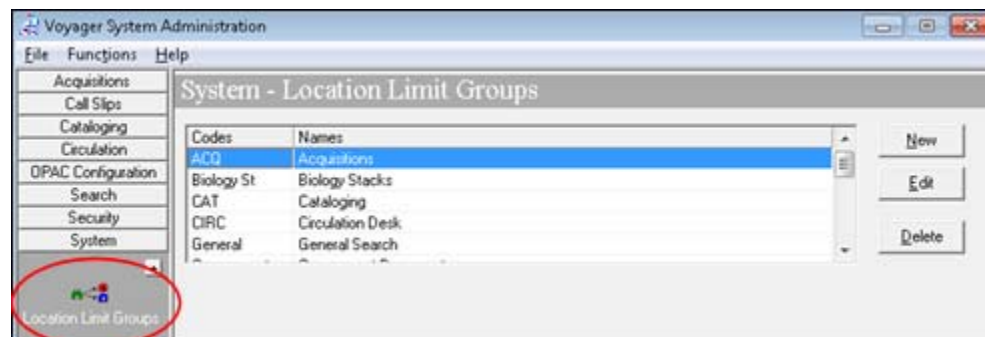


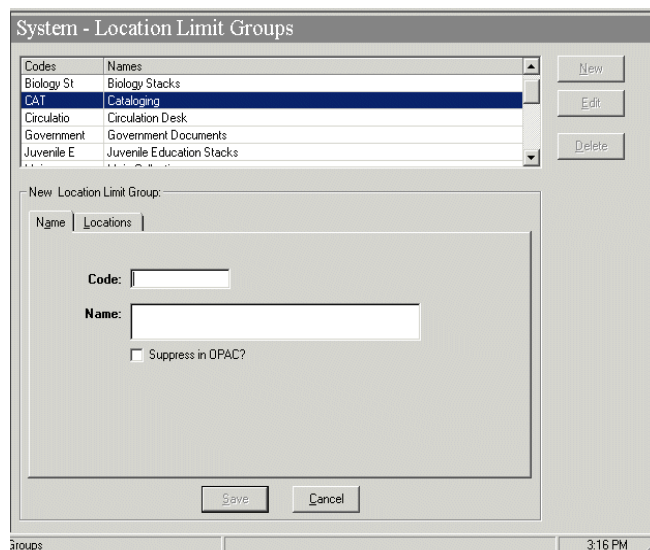
Figure 10-36. System - Location Limit Groups main dialog box

If you are...	Then...
Adding a new group	click the New button

Result: The **New Location Limit Group** dialog box opens (see [Figure 10-37](#)).

Editing an existing group	1. Select the appropriate group
	2. click the Edit button

Result: The **Edit Location Limit Group** dialog box opens.

**Figure 10-37. New Location Limit Groups dialog box**

3. Enter a group code in the **Code** field.
4. Enter a group name in the **Name** field. See [Table 10-9](#) for a description of each option.

Table 10-9. Name and Locations tab options

Options	Description
Code	Required. 10 characters in length. The code identifies in the database which locations can be searched.
Name	Required. 60 characters in length. Use to enter a more descriptive name for Location Limit Group.
Suppress in OPAC?	Optional. Use this check box to suppress the locations in WebVoy��ge. The locations are not suppressed from staff members.

5. Enter the **Locations** tab options. See [Table 10-10](#) for a description of each option.

Result: Invokes the Locations list (see [Figure 10-38](#)).

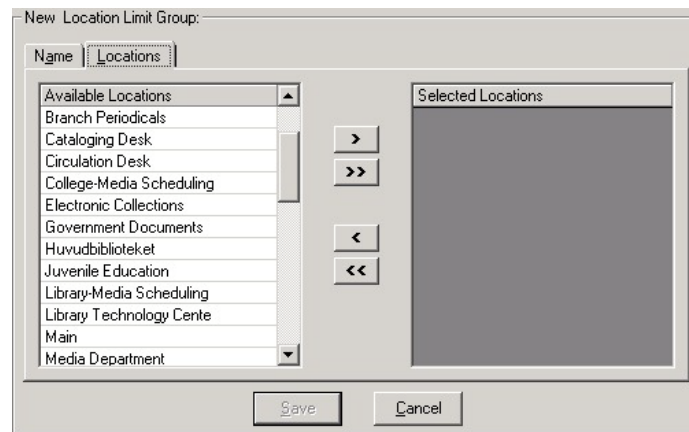


Figure 10-38. Locations list

Result: This completes the definition of the **Locations** portion of a Location Limit Group.

Table 10-10. Name and Locations tab options

Option	Description
Available Locations	List of Available Locations (display of Names field entered/created in System - Locations) from which to select. Use the right-arrow button () to move Available Locations to the Selected Locations list.
Selected Locations	List of Selected Locations. Use the left-arrow button () to return Selected Locations to the Available Locations list.

- Click **Save** or click **Cancel**.

Result: This saves or cancels the **New Location Limit Group**.

Deleting Location Limit Groups

This section provides step-by-step instructions on how to delete a Location Limit Group in the System section of the System Administration module.

The Location Limit Group can be deleted at any time and does not affect the location. After deleting a Location Limit Group, restart the WebVoyage module to refresh WebVoyage Location Limit Groups.



Procedure 10-23. Deleting a Location Limit Group

Use the following to delete a Location Limit Group.

1. Click **System** on the vertical listbar in Voyager System Administration.

Result: The Voyager **System** options display in the vertical listbar area.

2. Click **Location Limit Groups**.

Result: The **System - Location Limit Groups** dialog box opens. See [Figure 10-36](#).

3. Highlight the Location Limit Group to be deleted, and click **Delete**.

Result: The **Delete Location Limit Group** dialog box opens requiring confirmation of the deletion. See [Figure 10-39](#).

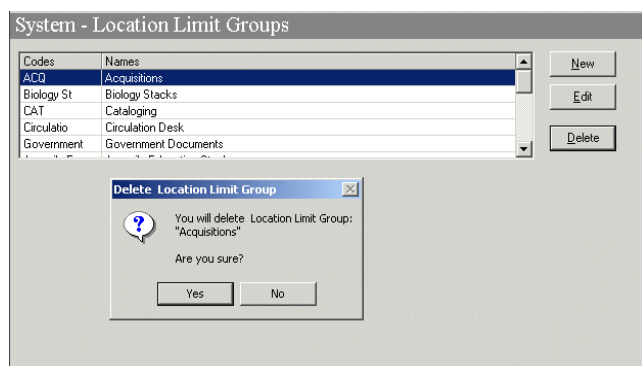


Figure 10-39. Location Limit Groups delete confirmation

4. Click **Yes** or click **No**.

Result: Selecting **Yes** confirms your deletion request and processes the deletion. Selecting **No** cancels your deletion request.

Miscellaneous

The **System - Miscellaneous** workspace (see [Figure 10-40](#)) contains check boxes which allow you to enable or disable the following.

- Retention of Patron IDs for Circulation history
- Retention of Patron IDs for Media Booking history
- Retention of Patron IDs for Item Distribution history
- Display of headings subdivision separators

NOTE:

The patron retention information is not retroactive. That is, only transactions that have occurred after the option has been selected displays. Previous transactions do not display. Also, it does not contain information about any currently charged items, only discharged items.

NOTE:

The display of headings subdivision separators are not retroactive. That is, display information for bibliographic records that are updated or created after the selection/deselection of this option are modified only.

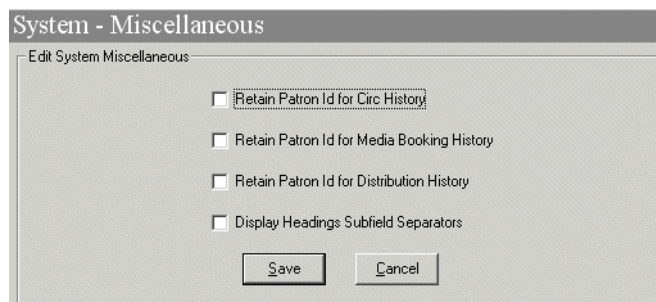


Figure 10-40. System - Miscellaneous Workspace

Miscellaneous Workspace Field Descriptions

See [Table 10-11](#) for a description of the **System - Miscellaneous** workspace.

Table 10-11. Fields in the System - Miscellaneous Workspace

Name	Description	Required	Type and Range
Retain Patron Id for Circ History	If this check box is not checked, there is no record retained of which patron charged which items. When checked, the identification of all patrons who have charged the item are retained. When checked and when Retain Patron ID (Circjob 38) is run, the specified number of patrons information is retained. In this case, a record of at least some patrons who have charged out this item is kept. See the <i>Voyager Technical User's Guide</i> for information about Circjob 38. You can view this information on the Item Circulation History dialog box in the Circulation module, which becomes active when an item is selected, providing you have the appropriate security. See the <i>Voyager Circulation User's Guide</i> and the <i>Voyager System Administration User's Guide</i> for more information.	No	Check box The default is unchecked.

Table 10-11. Fields in the System - Miscellaneous Workspace

Name	Description	Required	Type and Range
Retain Patron Id for Media Booking History	If this check box is not checked, there is no record of which patron charged which media items. When checked, the identification of all patrons who have charged media items is retained. When checked and when Retain Media Patron ID (Mediajob 5) is run, a specified number patrons information is retained. In this case at least, a record of patron media booking information is kept. See the <i>Voyager Technical User's Guide</i> for more information on this job. NOTE: In order for historical bookings to be searchable, you must also place a check in the View Historical? check box in Media System Administration. This allows the users to view booking histories. See the <i>Voyager Media System Administration User's Guide</i> for more information.	No	Check box The default is unchecked.
Retain Patron Id for Distribution History	If this check box is not checked, there is no record of which patron received which items. When checked, the identification of all patrons who received a distributed item is retained. When checked and when Retain Patron ID (Circjob 38) is run, a specified number patrons with distribution information is retained. See the <i>Voyager Technical User's Guide</i> for information about Circjob 38. NOTE: This information is stored in the DISTRIBUTION_TRANSACTION database table that can be accessed by performing an SQL query. It is not viewable in the circulation module.	No	Check box The default is unchecked.

Table 10-11. Fields in the System - Miscellaneous Workspace

Name	Description	Required	Type and Range
Display Headings Subfield Separators	If checked, a visual separator (- -) is generated between a subject heading (6XX) and its subdivisions (‡v, ‡x, ‡y, and ‡z) for subsequent bibliographic record additions and modifications. If unchecked, the visual separators are not added to the display headings information in the database for subsequent bibliographic record additions and modifications.  IMPORTANT: <i>For existing records, a regen is required to update the display headings information in the database in order for the dashes to display in search results. Contact Customer Support to schedule a regen.</i> For more information, see Headings Subdivision Separators on page 10-72.	No	Check box The default is unchecked.

Security

Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **System - Miscellaneous** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Headings Subdivision Separators

While performing subject heading searches in Webvoyage and staff client modules such as Cataloging, headings (6xx) and their subdivisions (‡v, ‡x, ‡y, and ‡z) are separated by a space in the search results display as the system default. Using Display Headings Subfield Separators allows you to display a double dash (- -) between a subject heading and its subdivisions in a search results display to enhance its readability.

When the feature is enabled, the separator is added to the display headings information stored in the database for new and modified bibliographic records. Note that the dashes are stored in a display field, not the MARC record.

**IMPORTANT:**

Pre-existing records (stored prior to the selection of Display Headings Subfield Separators) are not updated unless a regen is performed to update the display headings in the database. Contact Customer Support to schedule a regen.

Search Display Examples

[Table 10-12](#) shows an example of a MARC record that contains subject headings with subdivisions.

Table 10-12. Example MARC RECORD for Headings Subdivision Separators

Tag	I1	I2	Subfield Data
650		0	⌘a Cats ⌘x Mythology ⌘x Congresses.
650		0	⌘a Cats ⌘x Religious aspects.
650		0	⌘a Cats ⌘x Religious aspects ⌘x Congresses.

NOTE:

When a bibliographic record is created or modified, the separator is changed in the display headings, not the MARC record.

[Figure 10-41](#) shows the results of a subject headings search of the keyword cat s? with no subdivision separators.

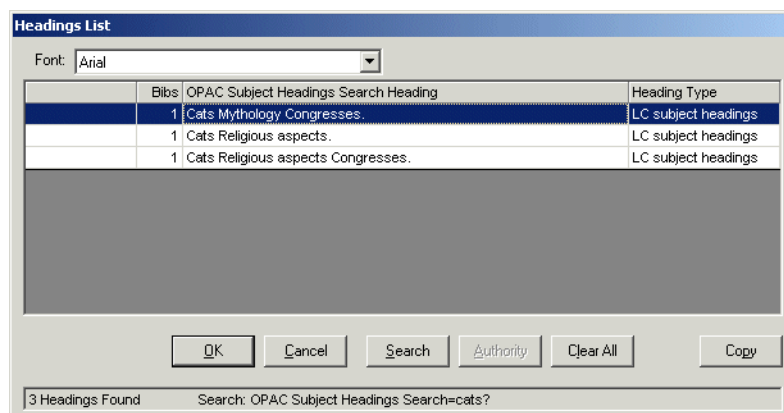


Figure 10-41. Example Headings Search with No Separators Displayed

[Figure 10-42](#) shows the results of a subject headings search of the keyword `cats?` with subdivision separators.

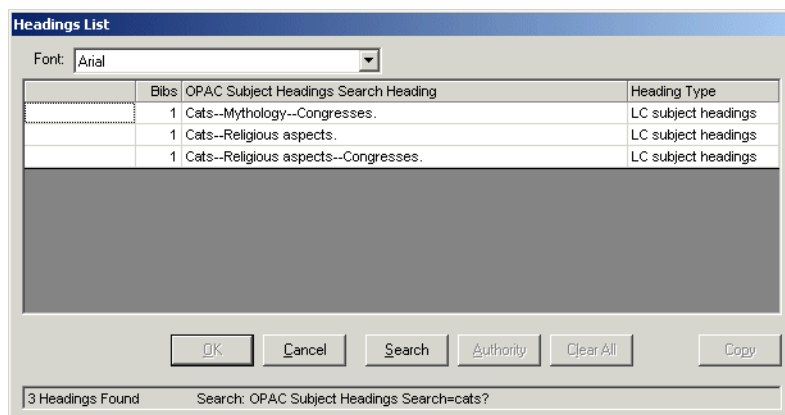


Figure 10-42. Example Headings Search with Separators Displayed

Owning Libraries

Institutions must specify that bibliographic records belong to Owning Libraries. This is the library to which material to be borrowed belongs. Every database must define one (only one) Owning Library.

An Owning Library is a group of locations that provides a security mechanism for cataloging. Based on cataloging security profiles, you can add, edit, or delete records for a specific Owning Library. You cannot change another Owning Library's records without security access. Depending on a user's security clearance, the Owning Library for the active bibliographic record can be changed from within the Cataloging module.

NOTE:

Owning libraries neither impact searching nor limit searches by location. When you add a location, you must add the owning library.

Creating Owning Libraries

This section provides step-by-step instructions on how to create an Owning Library in the System section of the System Administration module.

You can define up to 255 owning libraries.



Procedure 10-24. Creating an Owning Library

Use the following to create an Owning Library.

1. Click **System** on the vertical listbar in Voyager System Administration.

Result: The Voyager **System** options display in the vertical listbar area.

2. Click **Owning Libraries**.

Result: The **System - Owning Libraries** dialog box opens (see [Figure 10-43](#)).

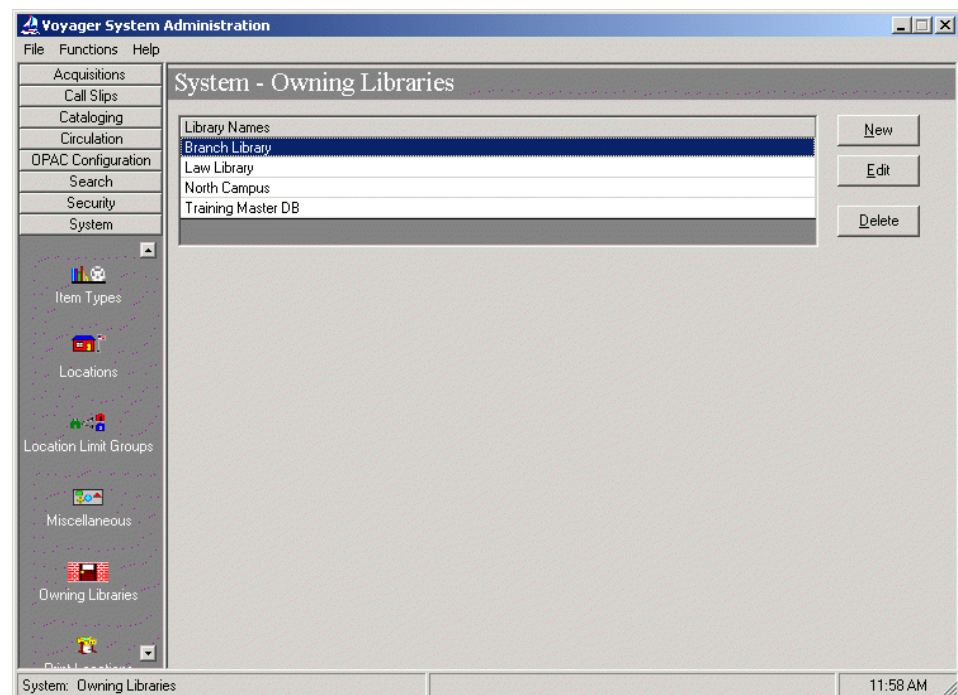


Figure 10-43. System - Owning Libraries main dialog box

3. Click **New**.

Result: The **New Owning Library** tab options display (see [Figure 10-44](#)).

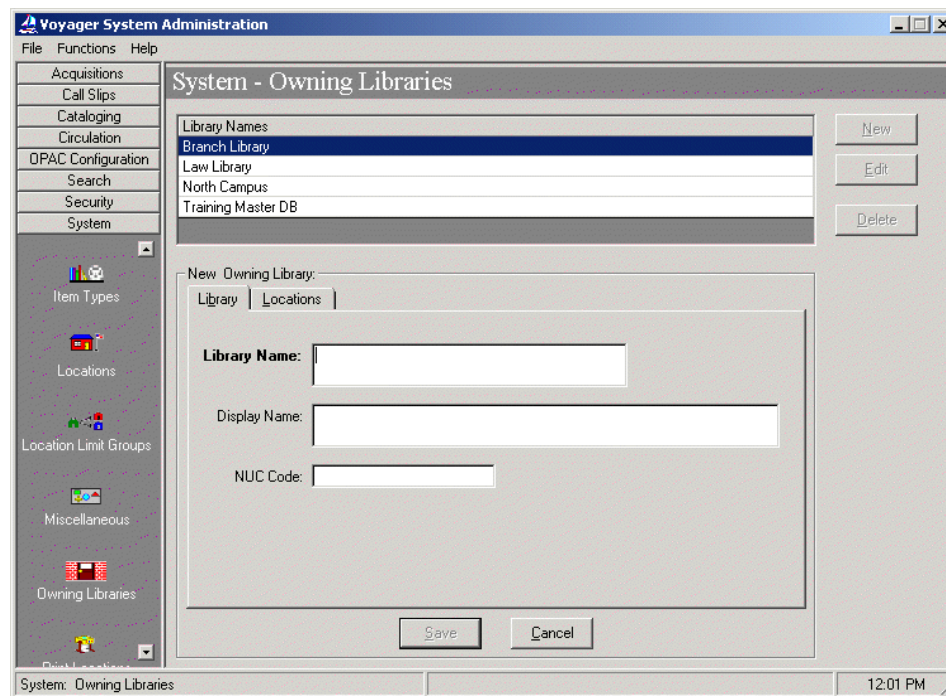


Figure 10-44. New Owning Library tab options

4. Enter the **Library** tab options. See [Table 10-13](#) for a description of each option.

Result: This completes the definition of the **Library** portion of an Owning Library.

Table 10-13. Library tab options

Options	Description
Library Name	Enter the Library Name up to 50 characters in length. This is the Owning Library Name that displays on the bibliographic record and holding record.
Display Name	Enter the Display Name up to 80 characters in length. This is the name that displays on the Titles Search Results page in WebVoyage. For this information to display, the Owning Library (title name created in Search - Title List Column Names) needs to be selected in Voyager System Administration Search - Indexes - Composite Definitions on the Search Results tab.

Table 10-13. Library tab options

Options	Description
NUC Code	Enter the Owning Library's NUC code. During bulk import or online import, the National Union Catalog (NUC) code identifies the owning library. The NUC value used for a new bibliographic or authority record creates an 040 tag. The 040 tag should be your code for the owning library.

5. Enter the **Locations** tab options. See [Table 10-14](#) for a description.

Result: This completes the definition of the **Locations** portion of an Owning Library.

Table 10-14. Locations tab options

Options	Description
Available Locations	List of Available Locations (display of Names field entered/created in System - Locations) from which to select. Use the right-arrow button () to move Available Locations to the Selected Locations list. Use the double-arrow button to move all locations.

6. Click **Save** or click **Cancel**.

Result: This saves or cancels the **New Owning Library**.

Editing Owning Libraries

This section provides instructions on how to edit Owning Libraries in the System section of the System Administration module.

The Edit function gives you the flexibility to reassign locations from one Owning Library to another Owning Library. This requires removing the location from the current Owning Library through the Edit function; and subsequently, selecting another Owning Library to edit and adding the location to the Selected Locations list of the other Owning Library.



Procedure 10-25. Editing an Owning Library

Use the following to edit Owning Libraries.

1. Click **System** on the vertical listbar in Voyager System Administration.

Result: The Voyager **System** options display in the vertical listbar area.

2. Click **Owning Libraries**.

Result: The **System - Owning Libraries** dialog box opens. See [Figure 10-43](#).

3. Highlight the Owning Library to be edited, and click **Edit**.

Result: The Edit Owning Library dialog box opens.

4. Enter your modifications (see [Table 10-13](#) and [Table 10-14](#)).

NOTE:

When editing selected locations on the **Locations** tab and you want to deselect a location from an Owning Library, you must assign it to another Owning Library. The process of assigning (selecting) the location to another Owning Library automatically deselects it from the Owning Library where it was previously selected.

Result: The Owning Library is modified to match your preferences.

5. Click **Save** or click **Cancel**.

Result: This saves or cancels the **Owning Library**.

Deleting Owning Libraries

This section provides step-by-step instructions on how to delete an Owning Library in the System section of the System Administration module.

NOTE:

You cannot delete an Owning Library if there are locations defined for that Owning Library.



Procedure 10-26. Deleting an Owning Library

Use the following to delete an Owning Library.

1. Click **System** on the vertical listbar in Voyager System Administration.

Result: The Voyager **System** options display in the vertical listbar area.

2. Click **Owning Library**.

Result: The **System - Owning Libraries** dialog box opens. See [Figure 10-43](#).

3. Highlight the Owning Library to be deleted, and click **Delete**.

Result: The **Delete Owning Library** dialog box opens requiring confirmation of the deletion. See [Figure 10-45](#).

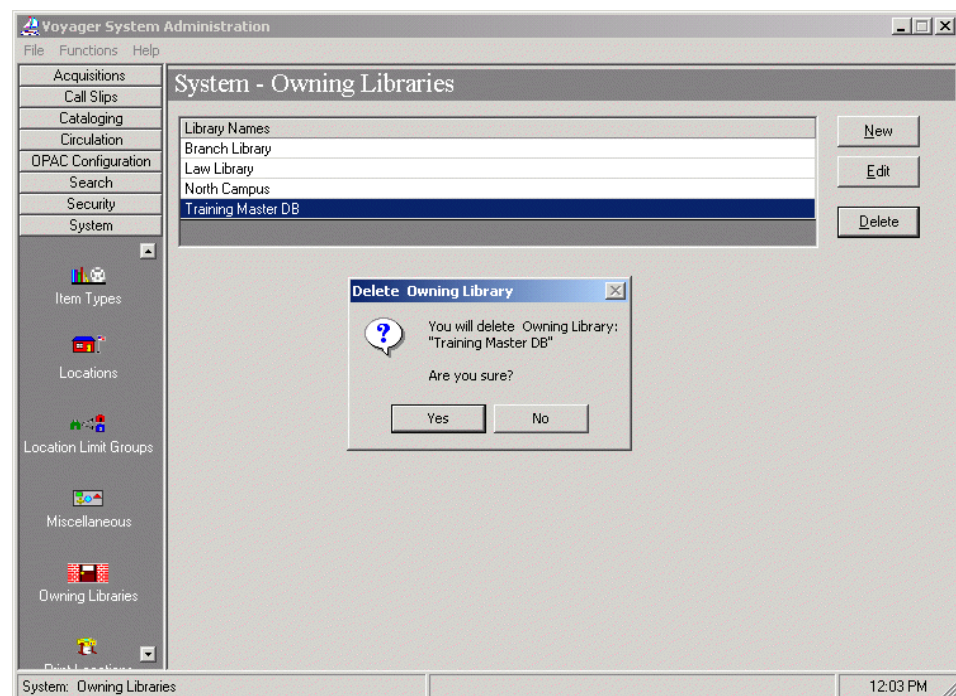


Figure 10-45. System - Owning Libraries delete confirmation

4. Click **Yes** or click **No**.

Result: Selecting **Yes** confirms your deletion request and processes the deletion. Selecting **No** cancels your deletion request.

Print Locations

Print locations are used to logically group various notices and reports for printing from Reporter. Despite the name, they are not physical printing locations.

Various activities, such as generating a claim notice, checking for authorized headings, and charging out books, occur in the modules. Libraries can run server batch jobs that create input files of reports and notices associated with these activities. These files might contain claim notices, an unauthorized name heading report, or overdue notices.

These input filenames have, as part of their name, a print location code. After running a batch job, sites use the Reporter module to produce the notices or reports. Reporter finds the correct file to print by matching the print location code defined on the **Global** tab in the Reporter module with the print location code found in the name of the input file on the server. An example filename might be `crcnotes.Circ.inp`, where `Circ` is the print location code.

Creating a new Print Location is done using the System Administration module using the **Systems - Print Locations** workspace.

Security

Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **System - Print Locations** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Print Locations Workspace

Creating, editing, and deleting Print Locations is done in the **System - Print Locations** workspace.

When first entering the **System - Print Locations** workspace, the top half opens (see [Figure 10-46](#)). It shows the names of any Print Locations already defined.

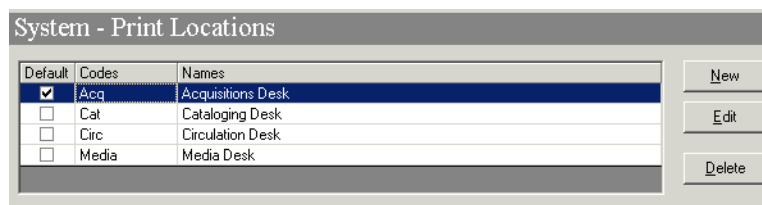


Figure 10-46. System - Print Locations Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **System - Print Locations** workspace opens (see [Figure 10-47](#)). In this example, the fields are blank because the **New** button was selected.

The screenshot shows a dialog box titled "New Print Location:". It contains the following fields and options:

- Code:** A text input field.
- Name:** A text input field.
- Default Print Location for:** A group box containing four checkboxes:
 - ☐ Default
 - ☐ Cataloging
 - ☐ Circulation
 - ☐ Acquisitions
 - ☐ Media Scheduling
- Buttons:** "Save" and "Cancel".

Figure 10-47. Print Location section

Field Descriptions

[Table 10-15](#) provides names, descriptions, if required, and type and range requirements for the fields in the **System - Print Locations** workspace.

Table 10-15. Fields in the System - Print Locations Workspace

Name	Description	Required	Type and Range
[Print Location] Code	The code for the Print Location. It becomes part of an input file name. The input file is then used in Reporter. It selects files on the server based on the type of report and code.	Yes	Alphanumeric. Do not use a / or a space in the code. Uppercase and lowercase allowed. The code is case sensitive. 10 characters.
[Print Location] Name	This is the name for the Print Location.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. The name is case sensitive. 25 characters.
Default Print Location for section			
Default	When checked, this indicates that the selected Print Location is the default for all of the Voyager modules. NOTE: This is used after the load only. Administrators must set up default print locations for each module.	Yes Only one is allowed.	Check box The default is unchecked.
Cataloging	When checked this indicates that all cataloging reports use this print location.	Yes Only one is allowed.	Check box The default is unchecked.
Circulation	When checked, this indicates that all circulation reports that are considered global reports will use this print location.	Yes Only one is allowed.	Check box The default is unchecked.

Table 10-15. Fields in the System - Print Locations Workspace

Name	Description	Required	Type and Range
Acquisitions	When checked, this indicates that all Acquisitions reports that are considered global reports will use this print location.	Yes Only one is allowed	Check box The default is unchecked.
Media Scheduling	When checked, this indicates that all media booking reports and notices that are considered global will use this print location. NOTE: Select a global print location for media scheduling even if you do not use it.	Yes Only one is allowed	Check box The default is unchecked.

Print Locations

In the System Administration module, sites define default print locations for each module, print locations, and a single default print location.

Default Print Locations for each module

A report or notice that does not depend on where the activity occurred is a global report and it is connected to a default print location for that module.

An example of an Acquisitions global report is the Global Open Orders report. This report provides information on all open orders, independent of the Acquisitions happening location where they were created. An example of a Circulation global report is the Global Circulation Statistics report. This report contains statistics from all of the Circulation happening locations. All of the Cataloging reports are considered global.

When printing any of these types of reports, the system uses the print location code for the print location that is defined as the specific module's print location. The example in [Figure 10-48](#) shows that the Circulation Desk is the default print location for the Circulation module.

Default	Codes	Names
☒	Acq	Acquisitions Desk
☐	Cat	Cataloging Desk
☒	Circ	Circulation Desk
☐	Media	Media Desk

Edit Print Location:

Code:

Name:

Default Print Location for:

☐ Default

☐ Cataloging ☐ Acquisitions

☒ Circulation ☐ Media Scheduling

Figure 10-48. Circulation Desk is defined as the global print location for Circulation

Print Locations

For each happening location in Circulation and Acquisitions (this does not include Cataloging since there are no notices and the reports are all global reports), sites choose a print location.

- When activity occurs at the happening location, for example, an item is charged, it is linked to that desk.
- When batch jobs are run, for example, overdue notices, they are associated with that desk.
- The desk is linked to a print location.
- The files created by the batch job contain the code for the print location, for example, `crcnotes.Circ.inp`.

[Figure 10-49](#) shows part of the **System - Print Location** workspace and the **Location Settings** dialog box from the policy definition.

Print Location: **Create Print Locations in System Administration.**

Code:

Name:

Default Print Location for:

☐ Default ☐ Cataloging ☐ Acquisitions ☒ Circulation ☐ Media Scheduling

Select the Default Print Location for the happening location.

Location Settings

Default Location:

Default Print Location:

☒ Circulation Location

Figure 10-49. How happening locations, print locations and Reporter work together

Default Print Location

When the system is unable to find a print location or a global print location, it will use the default print location that is defined for all Voyager modules in the **System - Print Locations** workspace. [Figure 10-50](#) shows the default print location.

Default	Codes	Names
☒	Acq	Acquisitions Desk
☐	Cat	Cataloging Desk
☐	Circ	Circulation Desk
☐	Circ2	Circulation Desk 2
☐	Media	Media Desk

Edit Print Location:

Code:

Name:

Default Print Location for:

☒ Default

☐ Cataloging ☒ Acquisitions

☐ Circulation ☐ Media Scheduling

Figure 10-50. Default Print Location

NOTE:

The default print location is used immediately following your circulation transactions data load since the transactions will not have a circulation happening desk associated with them, and therefore no print location associated with them.

From the information provided in [Figure 10-51](#), this shows the Default Default Print Location of Acq - Acquisitions Desk, a default print location for circulation of Circ - Circulation Desk, and a print location desk of Circ2 - Circulation Desk 2.

System - Print Locations

Default	Codes	Names
☒	Acq	Acquisitions Desk
☐	Cat	Cataloging Desk
☐	Circ	Circulation Desk
☒	Circ2	Circulation Desk 2
☐	Media	Media Desk

Code:

Name:

Default Print Location for:

☐ Default	☐ Acquisitions
☐ Cataloging	☐ Media Scheduling
☒ Circulation	

Code:

Name:

Default Print Location for:

☐ Default	☐ Acquisitions
☐ Cataloging	☐ Media Scheduling
☐ Circulation	

Figure 10-51. Examples of Print Locations



IMPORTANT:

You must define one default print location and one global print location for each module. You may also define separate print locations to associate with additional happening locations. These may all be the same print location or separate print locations.

Small institutions may want just one print location defined with all check boxes checked. However, those institutions with many circulation desks and acquisition departments might each want to print their own reports. If you want serials reports separate from monographs reports, then establish separate acquisitions happening locations for each one and link them to separate print locations.

See the *Voyager Reporter User's Guide* for more information on creating the input files and using the Voyager's Reporter module.

Creating a Print Location

This section provides step-by-step instructions on how to create a Print Location in the System section of the System Administration module.



Procedure 10-27. Creating a Print Location

Use the following to create a Print Location.

1. Access the System Administration module's **System - Print Locations** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Print Locations** button in the System listbar.

Result: The **System - Print Locations** workspace opens.

2. Click the **New** button.
3. Enter the code for your Print Location in the **Code** field.
4. Enter the name for your Print Location in the **Name** field.
5. From the Default Print Location section, check those check boxes that apply.

NOTE:

You do not have to check any of the check boxes as long as a default print location and module-specific global print locations are already defined.

6. Click **Save** to save the information or click **Cancel** to return to the **System - Print Locations** workspace.

Result: If saved, the system returns to the **System - Print Locations** workspace and the new Print Location displays in the list of Print Locations.

Enabling the Use of Print Locations

To use print locations that have been defined in the System Administration module, you must perform the following:

- link the print location to a happening locations
- set the Processing Location (print location) in Reporter

Link Print Locations to Happening Location(s)

Once print locations are created in the System Administration module they must be linked to appropriate Acquisitions and Circulation policy groups.

For Acquisitions, select the happening locations that are order/claim/pay invoices locations and choose a print location to be associated with each acquisitions happening location. This links those order, claim, and pay *happening* locations to print locations for Acquisitions. See [Locations Tab](#) on [page 2-45](#) for more information.

For Cataloging, since all cataloging reports go to the Cataloging Global Printing Location that you selected as the Default Print location, you do not need to select separate print locations in the Cataloging Policy Group.

For Circulation, select each circulation happening location at which you perform circulation activities and choose a print location. This is the step that links those circulation *happening* locations to a specific print location. For example, this determines where circulation notices go, return address on notices and how statistics are grouped. See [Locations Tab](#) on [page 5-58](#) for more information.

For Media reports and notices, in Media Scheduling System Administration link the Booking desk and/or Pickup Point with a notice and print location. See the *Voyager Media Scheduling System Administration User's Guide* for more information.

Select the Processing Location (print location) in Reporter

In Reporter users provide the name of the print location whose associated files it should print (see [Figure 10-52](#)).

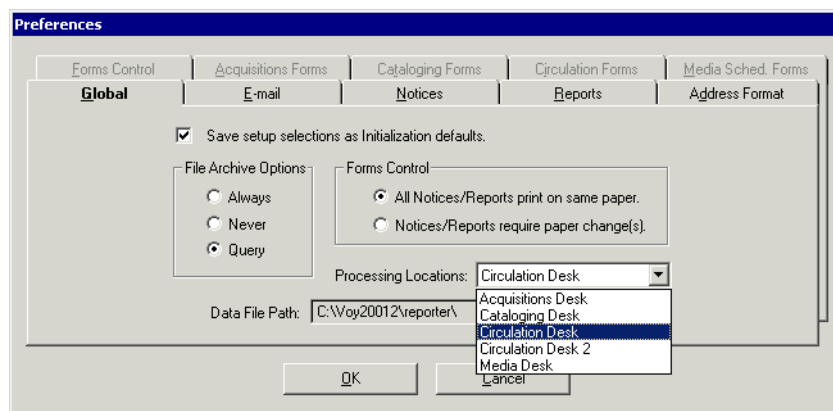


Figure 10-52. Selecting the Processing (Print) Location in Reporter

See the *Voyager Reporter User's Guide* for additional information.

Editing a Print Location

This section provides step-by-step instructions on how to edit a Print Location in the System section of the System Administration module.

Sites may edit Print Locations. After doing so, they should make corrections in the policy groups to which the print location is associated. They will also need to make corresponding changes in the Reporter module.



Procedure 10-28. Editing a Print Location

Use the following to edit a Print Location.

1. Access the System Administration module's **System - Print Locations** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Print Locations** button in the System listbar.

Result: The **System - Print Locations** workspace opens.

2. Highlight the Print Location to be edited.

3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the system returns to the **System - Print Locations** workspace and the Print Location has been edited.

Deleting a Print Location

This section provides step-by-step instructions on how to delete a Print Location in the System section of the System Administration module.

Sites may delete Print Locations.

NOTE:

Before deleting a default print location, you must first assign a new one.



Procedure 10-29. Deleting a Print Location

Use the following to delete a Print Location.

1. Access the System Administration module's **System - Print Locations** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Print Locations** button in the System listbar.

Result: The **System - Print Locations** workspace opens.

2. Highlight the Print Location to be deleted.
3. Click the **Delete** button.

Result: The **Delete Print Locations** dialog box opens asking for confirmation of the deletion (see [Figure 10-53](#)).

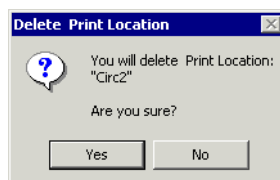


Figure 10-53. Delete Print Locations confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Print Locations.

Result: If deleted, the system returns to the **System - Print Locations** workspace and the Print Location is immediately removed from the listing of Print Locations.

Statistical Categories

Patron Group and Item Type Statistical Categories refer to sub-types of patrons and items. These are used to further distinguish patrons and items for purposes of data collection and analysis. These categories can be used for studies of usage patterns or collection development, but are not needed for applying circulation policies.

Assigning Statistical Categories to patrons or items allows you to track information of importance to you without having to create large numbers of Item Types and Patron Groups which would make your circulation policy implementation unnecessarily complicated.



IMPORTANT:

Wait until after your database load before changing any Statistical Category information.

Statistical Categories are created, edited, and deleted in the System Administration module.

Security

Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **System - Statistical Categories** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-27](#).

Statistical Categories Workspace

The **System - Statistical Categories** workspace contains the **Patron** and **Item** tabs (see [Figure 10-54](#)).

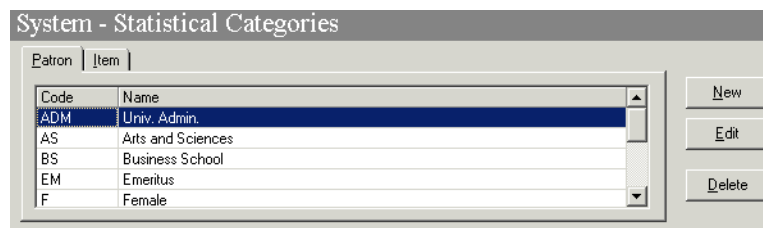


Figure 10-54. System - Statistical Categories Workspace

Patron Tab

Using the **Patron** tab, you can define Patron Group Statistical Categories to further categorize patrons.

For example, sites could track patron usage patterns by student majors/minors, departments, or part-time or full-time status. You establish Statistical Categories for all subject majors and minors, departments, full-time, and part-time. A patron of either Patron Group, faculty or student, could then be assigned to as many of the Statistical Categories as you want.

Patron Group Statistical Categories are completely optional, and need not be defined at all. If defined, they are not required when creating a patron record.

Any Statistical Category you define may be assigned to a patron of any Patron Group.

There is no limit on the number of Statistical Categories you can define for patrons.

**IMPORTANT:**

You should not create Patron Group Statistical Categories before your patron database load. The load creates Patron Group Statistical Category Codes during the load processing provided that you have this data in your patron input file. After the load completes, see [Patron Tab](#) for details regarding adding patron information.

When first entering the **System - Statistical Categories** workspace, the top half opens (see [Figure 10-55](#)). It opens to the **Patron** tab and shows the codes and names of any patron statistical categories already defined.

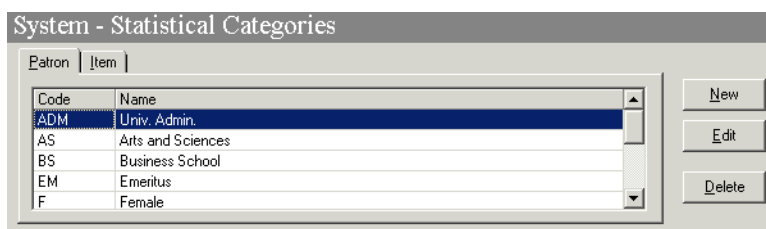


Figure 10-55. System - Statistical Categories Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **System - Statistical Categories** workspace, **Patron** tab opens (see [Figure 10-56](#)). In this example, the fields are blank because the **New** button was selected.

Figure 10-56. New Patron Statistical Category section of the Patron tab

Field Descriptions

[Table 10-16](#) provides names, descriptions, if required, and type and range requirements for the fields on the **Patron** tab of the **System - Statistical Categories** workspace.

Table 10-16. Fields on the Patron tab of the System - Statistical Categories Workspace

Name	Description	Required	Type and Range
[Patron Statistical Category] Code	Patron Statistical Category code.	Yes	Alphanumeric 3 characters.
[Patron Statistical Category] Name	Patron Statistical Category name. For example: Library Staff University Administration Statistical Categories will display in alphabetical lists to operators who can assign them. Once assigned, the Patron Statistical Category Name displays in the patron record.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.

Item tab

Using the **Item** tab, sites can define Item Statistical Categories if your site wants to further categorize items.

For example, if your library has defined Government Documents as an Item Type and you want to track usage at a more detailed level, you could establish Item Type Statistical Categories such as, federal, state, provincial, local, United Nations, and so on.

Item Statistical Categories are completely optional, and need not be defined at all. If defined, they are not required when creating a item record.

Any Statistical Category you define may be assigned to an item of any Item Type.

There is no limit on the number of Statistical Categories you can define for items.

[Figure 10-57](#) shows the **Item** tab.

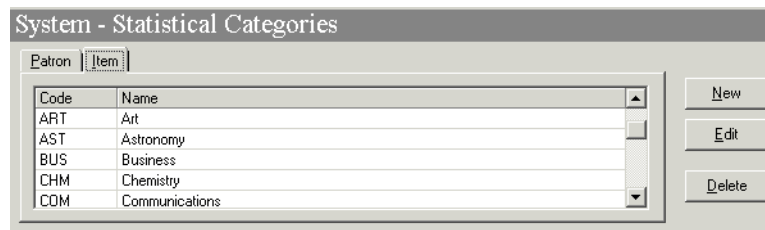


Figure 10-57. System - Statistical Categories Workspace, Item Tab

After clicking either the **New** or **Edit** buttons, the bottom half of the **System - Statistical Categories** workspace, **Item** tab opens (see [Figure 10-58](#)). In this example, the field is blank because the **New** button was selected.

New Item Statistical Category:

Code:

Name:

Figure 10-58. New Item Statistical Category section of the Item tab

Field Descriptions

[Table 10-17](#) provides names, descriptions, if required, and type and range requirements for the fields on the **Item** tab of the **System - Statistical Categories** workspace.

Table 10-17. Fields on the Item tab of the System - Statistical Categories Workspace

Name	Description	Required	Type and Range
[Item Type Statistical Category] Code	Item Statistical Category code.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 3 characters.
[Item Type Statistical Category] Name	Name of the Item Statistical Category. For example: Local Document State Document Federal Document Statistical Categories will display in alphabetical lists to operators who can assign them. Once assigned, the Statistical Category Name displays in the item record.	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.

Creating a Patron Group Statistical Category

This section provides step-by-step instructions on how to create a Patron Group Statistical Category in the System section of the System Administration module.

You can add new categories at any time after you initial load.



Procedure 10-30. Creating a Patron Group Statistical Category

Use the following to create a Patron Group Statistical Category.

1. Access the System Administration module's **System - Statistical Categories** workspace.

- a. Click **System** in the listbar.
- b. Click the **Statistical Categories** button in the System listbar.

Result: The **System - Statistical Categories** workspace opens.

2. Click the **New** button.
3. Enter the code for your Patron Group Statistical Category in the **Code** field.
4. Enter the name of your Patron Group Statistical Category in the **Name** field.
5. Click **Save** to save the information or click **Cancel** to return to the **System - Statistical Categories** workspace.

Result: If saved, the system returns to the **System - Statistical Categories** workspace and the category displays in the list.

Editing a Patron Group Statistical Category

This section provides step-by-step instructions on how to edit a Patron Group Statistical Category in the System section of the System Administration module.

You can change any or all information on Patron Group Statistical Categories. If you change a category, that change is reflected throughout the database wherever that patron group is used.

In any record, you can always remove any Statistical Category or assign another.



Procedure 10-31. Editing a Patron Group Statistical Category

Use the following to edit a Patron Group Statistical Category.

1. Access the System Administration module's **System - Statistical Categories** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Statistical Categories** button in the System listbar.

Result: The **System - Statistical Categories** workspace opens.

2. Highlight the Patron Group Statistical Category to be edited.

3. Click the **Edit** button.
4. Enter any new information in the fields you want to edit.
5. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the system returns to the **System - Statistical Categories** workspace and the category has been edited.

Deleting a Patron Group Statistical Category

This section provides step-by-step instructions on how to delete a Patron Group Statistical Category in the System section of the System Administration module.

Once you use a category in a record, you cannot delete it from the System Administration module. You can only delete a Statistical Category if it is no longer in use (or was never used) in a record.



Procedure 10-32. Deleting a Patron Group Statistical Category

Use the following to delete a Patron Group Statistical Category.

1. Access the System Administration module's **System -Statistical Categories** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Statistical Categories** button in the System listbar.

Result: The **System - Statistical Categories** workspace opens.

2. Highlight the Patron Group Statistical Category to be deleted.
3. Click the **Delete** button.

Result: The **Delete Patron Statistical Category** dialog box opens asking for confirmation of the deletion (see [Figure 10-59](#)).

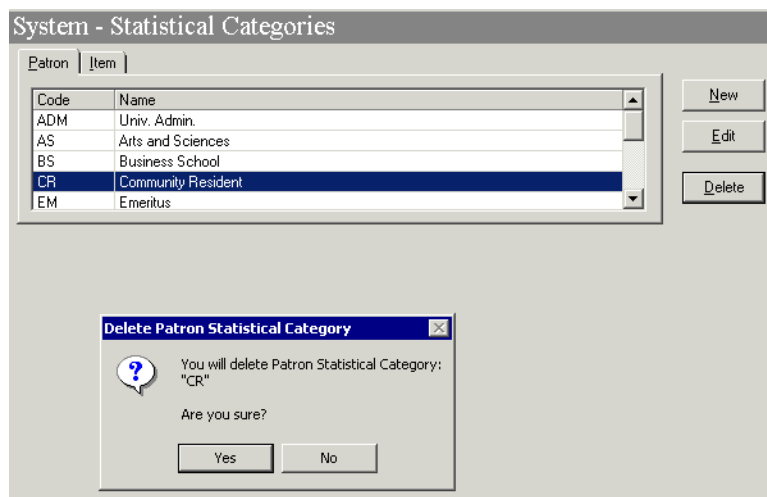


Figure 10-59. Delete Patron Group Statistical Category Confirmation

4. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the Fine or Fee Reason.

Result: If deleted, the system returns to the **System - Statistical Categories** workspace and the Patron Group Statistical Category is immediately removed from the listing of categories.

Creating an Item Statistical Category

This section provides step-by-step instructions on how to create an Item Statistical Category in the System section of the System Administration module.

You can add new categories at any time after your initial load.



Procedure 10-33. Creating an Item Statistical Category

Use the following to create an Item Statistical Category.

1. Access the System Administration module's **System - Statistical Categories** workspace.

- a. Click **System** in the listbar.
- b. Click the **Statistical Categories** button in the System listbar.

Result: The **System - Statistical Categories** workspace opens.

2. Click the **Item** tab.
3. Click the **New** button.
4. Enter the code for your Item Statistical Category in the **Code** field.
5. Enter the name of your Item Statistical Category in the **Name** field.
6. Click **Save** to save the information or click **Cancel** to return to the **System - Statistical Categories** workspace.

Result: If saved, the system returns to the **System - Statistical Categories** workspace and the category opens in the list.

Editing an Item Statistical Category

This section provides step-by-step instructions on how to edit an Item Statistical Category in the System section of the System Administration module.

You can change any or all information on Item Statistical Categories. If you change a category, that change is reflected throughout the database wherever that item type is used.

In any record, you can always remove any Statistical Category or assign another.



Procedure 10-34. Editing an Item Statistical Category

Use the following to edit an Item Statistical Category.

1. Access the System Administration module's **System - Statistical Categories** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Statistical Categories** button in the System listbar.

Result: The **System - Statistical Categories** workspace opens.

2. Click the **Item** tab.
3. Highlight the Item Statistical Category to be edited.
4. Click the **Edit** button.
5. Enter any new information in the fields you want to edit.
6. Click the **Save** button to save the changes or click the **Cancel** button if you do not want to save the changes.

Result: If saved, the system returns to the **System - Statistical Categories** workspace and the category has been edited.

Deleting an Item Statistical Category

This section provides step-by-step instructions on how to delete an Item Statistical Category in the System section of the System Administration module.

Once you use a category in a record, you cannot delete it from the System Administration module. You can only delete a Statistical Category if it is no longer in use (or was never used) in a record.



Procedure 10-35. Deleting an Item Statistical Category

Use the following to delete an Item Statistical Category.

1. Access the System Administration module's **System -Statistical Categories** workspace.
 - a. Click **System** in the listbar.
 - b. Click the **Statistical Categories** button in the System listbar.

Result: The **System - Statistical Categories** workspace opens.

2. Click the **Item** tab.
3. Highlight the Item Statistical Category to be deleted.
4. Click the **Delete** button.

Result: The **Delete Item Statistical Category** dialog box opens asking for confirmation of the deletion (see [Figure 10-60](#)).

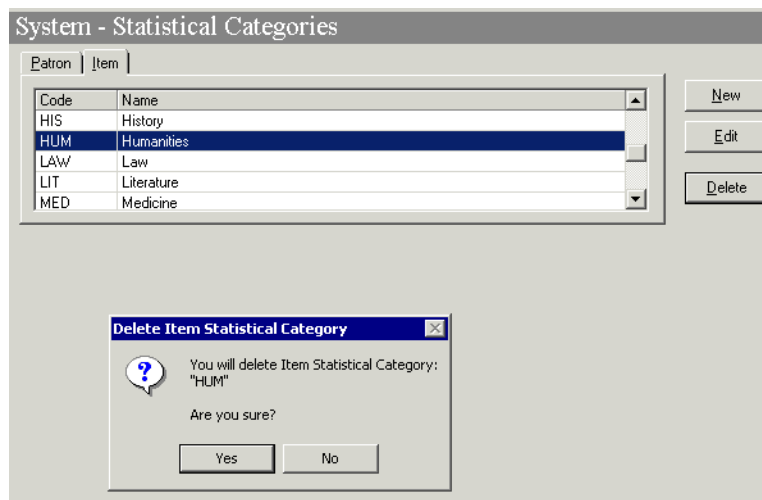


Figure 10-60. Delete Item Statistical Category confirmation

5. Click **Yes** to proceed with the delete. Click **No** if you do not want to delete the category.

Result: If deleted, the system returns to the **System - Statistical Categories** workspace and the Item Statistical Category is immediately removed from the listing of categories.

Introduction

The Web Services listbar option provides configuration parameters that you can use to enable and control services provided to patrons through Primo (OPAC via Primo). Specifically, the following facilities can be enabled for patrons:

- Login summary (see [Login Summary](#) on [page 11-1](#))
- Patron self-registration (see [Patron Self-Registration](#) on [page 11-2](#))
- Service configuration (see [Service Configuration](#) on [page 11-6](#))
 - Enable/update PIN
 - Enable/update SMS

Login Summary

The purpose of the Web Services - Login Summary in Voyager System Administration is to provide the configuration parameters for specifying the following patron alerts at login:

- Overdue items
- Fines/fees owed
- Circulation blocks
- Expiring system account



Procedure 11-1. Enabling Patron Alerts at Login

Use the following to enable patron alerts in Primo at login.

1. Access the Login Summary workspace (Web Services > Login Summary).
 2. Select **Enable Web Service**.
 3. Select one or more of the following alerts to display:
 - Patron has overdue items
 - Patron owes fines/fees
 - Patron has blocks
 - Patron access will expire
 4. For each alert you select, specify the text/message that you want to display to the patron at login. The following variables are available for use in the message text:
 - \p = patron's name
 - \l = comma-separated list of libraries (cluster names) to which the patron alert applies
 - \d = actual date when the patron's account expires
 - \n = number of days until the patron's account expires

When 0 displays in the alert to the patron, this indicates that the patron's account expires that same day (in other words, *today*).
 5. If you select the **Patron access will expire** alert, use the **Expiration Alert Days** parameter to set the number of days before the patron account expires to display this alert to the patron at login. You may specify a number in the range of 0-999.
 6. Click **Save**.
-

Patron Self-Registration

The purpose of the Web Services - Patron Self-Registration option in Voyager System Administration is to provide the configuration parameters for you to tailor that enable patrons to complete online patron registration from Primo. First you

need to indicate that patron self-registration is a service that you want to provide to your patrons by selecting Enable Web Service. After you have selected Enable Web Service, you need to configure the following key components:

- Fields that are to display for online registration purposes
- Default patron group
- Patron purge period (number of days)



Procedure 11-2. Enabling Patron Self-Registration

Use the following to configure the parameters required to enable patrons from Primo to be able to complete online self-registration.

1. Access the Patron Self-Registration workspace (Web Services > Patron Self-Registration).

Web Services - Patron Self-Registration

Edit Patron Self-Registration:

☒ Enable Web Service?

Set Purge: 0 days Default Patron Group: Graduate Student

Registration Fields:

Field	Visible?	Required?
Identifier	☒	☒
Identifier Type	Institution Id	
Title	☐	☐
City	☒	☐
First Name	☒	☐
State	☒	☒
Middle Name	☐	☐
Country	☒	☒
Last Name	☒	☒
Zip Code	☒	☒
Primary Phone	☒	☒
Email Address	☒	☒
Other Phone	☒	☐
SMS Number	☒	☐
Address Line 1	☒	☒
Department	☒	☐
Address Line 2	☒	☐
Major	☒	☐
Address Line 3	☒	☐
Birth Date	☒	☐
Address Line 4	☒	☐
Address Line 5	☒	☐

Save Cancel

Figure 11-1. Patron Self-Registration Workspace

2. Select **Enable Web Service**.
3. Specify the number of days in which the patron registration is to be purged (0-999).
4. Specify the default patron group from the drop-down list.

If you are part of a clustered environment, you must first select a cluster in order to get the correct list of patron groups from which to select.

5. Specify the fields that are to be visible/available for registration and whether these fields are required as a part of the registration process.

The Last Name and the Address Line 1 fields are required and, therefore, must be identified as visible. The system selects these options by default.

When you select the Identifier field as visible, it must be a required field, and the system automatically selects the Required check box. In addition, you need to specify the Identifier Type from the drop-down list either institution ID or social security number (SSN).

6. Click **Save**.

Patron PINs

When you decide to implement patron self-registration for Primo (OvP) users, you can implement the following PIN Services:

- Send a default PIN (configured in `vxws.properties`) that automatically logs in a new Primo user the first time
- Provide the option (configured in Voyager System Administration) to edit PINs. Refer to [Service Configuration](#) on [page 11-6](#) for more information.

With `vxws.properties (/m1/voyager/yyydb/tomcat/vxws/context/vxws/ui/eng/)`, you can set a default PIN (see below) that is sent to a new user as part of the patron's initialization in the system.

```
#####
# Should VXWS users receive a default PIN when self-registering? If yes, add a default
# PIN for patrons after option.defaultPIN. PINs can be 4 - 12 characters, and are case
# sensitive.
#####
option.defaultPIN=
```

Optionally, you may choose to provide Primo (OvP) users with the alternative to change their PINs (as described in [Service Configuration](#) on [page 11-6](#)). This alternative also provides you with the option to define a default PIN.

Voyager provides you the flexibility to choose to implement either option or both options. If you choose to implement both options and specify a default PIN in each option, you will want to coordinate the default PIN settings that you select to match your requirements.

Service Configuration

The Service Configuration option provides the capability to:

- Enable the patron change PIN service and, optionally, define a default PIN
- Enable the patron change SMS service



Procedure 11-3. Enabling Patrons to Update Their PINs or SMS Numbers

Use the following to enable patrons from Primo to change their PINs or SMS numbers.

1. Access the Service Configuration workspace (Web Services > Service Configuration).
2. Select the service you want to enable.

When you enable the change PIN service, you may also specify a default PIN (with a length of 4 to 12).

3. Click **Save**.
-

Search Definition Tables



Introduction

Voyager comes with preset options so that once your database load and index generation are completed, you can begin searching immediately through a wide array of search types. However, you can change many of these preset options and add new ones of your own. In some cases, you cannot change search codes or delete certain search types. Modifications to the searches available to your staff and patrons can be made through the Search section of the System Administration module.

Heading Indexes

Search Names but not Search Codes can be changed. None of these indexes can be deleted nor can the constituent fields/subfields be changed. OPAC headings searches can be made available in staff modules. If you would like to add a heading index or modify a current heading index definition, the Voyager Data Services Group may be able to provide this service for a fee. Create an incident using the eService to place a request or ask for more information regarding this service.

Only the OPAC headings searches are available in the WebVoyage module. However, if your staff or patrons are aware of the four-letter search codes from System Administration, they can use those codes for a Command Line search in WebVoyage to search only those specific indexes. Enter the command line search in the following format/order:

1. The code
2. A space
3. Text to be searched

OPAC and Staff Name Heading Indexes - Bibliographic Fields (NAME/NHED)

NOTE:

Up to t = up to, but not including the first subfield t.

Table A-1. OPAC and Staff Name Heading Indexes - Bibliographic Fields (NAME/NHED)

Field	Subfields	Type	Rule
100	abcdgkq	personal	
110	abcdgkn	corporate	
111	abcdegknq	meeting	
400	abcdk	personal	Up to t
410	abcdgkn	corporate	Up to t
411	abcdegknq	meeting	Up to t
700	abcdgkq	personal	Up to t
710	abcdgkn	corporate	Up to t
711	abcdegknq	meeting	Up to t
800	abcdgkq	personal	Up to t
810	abcdgkn	corporate	Up to t
811	abcdeg(k)nq	meeting	Up to t

Authority Fields

NOTE:

An Authority 008/14, subfield a (main or added entry heading use) must exist in the record in order for the record to be indexed.

Table A-2. Authority Fields

Field Series	Subfields Included	Types
X00	abcdgkq	personal
X10	abcdgkn	corporate

Table A-2. Authority Fields

Field Series	Subfields Included	Types
X11	abcdegknq	meeting
X51	ab	corporate

OPAC and Staff Name/Title Heading Indexes - Bibliographic Fields (AUTH/AHED)

NOTE:

- Up to t = up to, but not including the first subfield t
- 100, 110 and 111 will be combined with the first found 240 adfgklmnop, 243 adfgklmnop, 245 afgknps. 1XX/245 will never be validated.
- 130 will be combined only with 245 afgknps.

Table A-3. OPAC and Staff Name/Title Heading Indexes - Bibliographic fields (AUTH/AHED)

Field	Name Subfields	Rule	Title Subfields	Type
100	abcdgkq			personal
110	abcdgkn			corporate
111	abcdegknq			meeting
130	adfgklmnoprs			uniform title
400	abcdkq	Up to t	fgklnt	
410	abcdgkn	Up to t	dfgklnt	corporate
411	abcdegknq	Up to t	fgklnt	meeting
700	abcdgkq	Up to t	fgklmnoprt	personal
710	abcdgkn	Up to t	dfgklmnoprst	corporate
711	abcdegknq	Up to t	fgklnpst	meeting
800	abcdgkq	Up to t	fgklmnoprst	personal
810	abcdgkn	Up to t	dfgklmnoprst	corporate
811	abcdegknq	Up to t	fgklnpst	meeting

Authority Fields

NOTE:

An Authority 008/14, subfield a (main or added entry heading use) must exist in the record in order for the record to be indexed.

Table A-4. Authority Fields

Field Series	Name Subfields	Rule	Title Subfields	Type
X00	abcdgkq	Up to t	fgklmnoprt	personal
X10	abcdgkn	Up to t	dfgklmnoprst	corporate
X11	abcdegknq	Up to t	fgklnpst	meeting

OPAC and Staff Subject Heading Indexes - Bibliographic Fields (SUBJ/SHED)

NOTE:

- Indicator 2 or \$2 will be used to determine thesaurus
- Lead subfields stop at the first t,v, x, y, z found
- Title subfields stop at the first v, x, y, z found

Table A-5. OPAC and Staff Subject Heading Indexes - Bibliographic fields (SUBJ/SHED)

Field	Lead Subfields	Title Subfields	Subdivisions
600	abcdgkq	fgklmnoprt	vxyz
610	abcdgkn	dfgklmnoprst	vxyz
611	abcdegknq	fgklnpst	vxyz
630	adfgklmnoprs		vxyz
650	abcd		vxyz
651	ab		vxyz
655	a	vxyz	vxyz

Authority Fields

NOTE:

- Authority 008/15 = (subject use)
- Authority 008/11 and 072\$2 [code] determines thesaurus

Table A-6. Authority Fields

Field	Lead Subfields	Title Subfields	Subdivisions
X00	abcdgkq	fgklmnoprt	vxyz
X10	abcdgkn	dfgklmnoprst	vxyz
X11	abcdegknq	fglnpst	vxyz
X30	adfgklmnoprs		vxyz
X50	abcd		vxyz
X51	ai		vxyz

OPAC and Staff Title Heading Indexes - Bibliographic Fields (TITL/THED)

Table A-7. OPAC and Staff Title Heading Indexes - Bibliographic Fields (TITL/THED)

Field	Subfields Included	Type
130	adfgklmnoprs	non-series
440	anp	series
730	adfgklmnoprs	non-series
830	adfgklmnoprs	series

Authority Fields Included

NOTE:

- Authority 008/14 = a (main or added entry heading use) as non-series
- Authority 008/16= (series heading use) as series

Table A-8. Authority Fields Included

Field	Subfield Included
X30	adfgklmnoprs

**Staff Subject Subdivision Heading Indexes -
Bibliographic Fields**

Table A-9. Staff Subject Subdivision Heading Indexes - Bibliographic Fields

Field	Subdivisions	Type
600	v	form
600	x	general
600	y	chronological
600	z	geographical
610	v	form
610	x	general
610	y	chronological
610	z	geographical
611	v	form
611	x	general
611	y	chronological
611	z	geographical
630	v	form
630	x	general
630	y	chronological
630	z	geographical
650	v	form
650	x	general
650	y	chronological
650	z	geographical
651	v	form
651	x	general
651	y	chronological
651	z	geographical

Authority Fields Indexed

- Indicators 2 and \$2 are used to determine thesaurus.
- All subdivisions are indexed separately.

Table A-10. Authority Fields Indexed

Field	Subdivisions	Type
X00	v	form
X00	x	general
X00	y	chronological
X00	z	geographical
X10	v	form
X10	x	general
X10	y	chronological
X10	z	geographical
X11	v	form
X11x	x	general
X11	y	chronological
X11	z	geographical
X30	v	form
X30	x	general
X30	y	chronological
X30	z	geographical
X50	y	form
X50	x	general
X50	y	chronological
X50	z	geographical
X51	y	form
X51	x	general
X51	y	chronological
X51	z	geographical

Authority Fields Authorized

Table A-11. Authority Fields Authorized

Field	Subfield Included	Type
180	x vyz	general
181	z vxy	geographical
182	y vxz	chronological
185	v xyz	form

Keyword Indexes

The keyword composite searches GKEY, JKEY, and TKEY cannot be deleted. You can change the constituent parts of JKEY and TKEY. You can add as many composite keyword indexes as you want and edit or delete any of the other composites distributed with Voyager.

Any keyword search can be added to the WebVoyage Basic Search page (refer to the procedure, *Changing the Dropdown List of Search Types for Basic Search*, in the *WebVoyage Basic User's Guide*).

Indexes in this section are included in the Builder portion of the staff clients unless marked as Staff Suppress and are included in the Advanced section of WebVoyage unless marked as OPAC Suppress.

Modifications to the searches available to your staff and patrons can be made through the Search - Indexes - Keyword Definitions section of the System Administration module.

Composite indexes for topically related searching such as Author, Title, and Subject are provided allowing indexes related to a topic to be searched with one command.

Composite indexes which are available as left-anchored or keyword include:

- Author
- Title
- Subject
- Journal Title
- Call Number

Each of these composites are made of many (but not all) related single definition indexes.

The Search Name may be changed. It has a 40-character maximum. The Indexed Field in [Table A-12](#) on [page A-9](#) indicates the MARC field tag and subfield(s) that are included but ignores indicator values.

JKEY is defined as the TKEY indexes limited to a leader bibliographic level of s.

Table A-12. Keyword Index Components

Search Name	Search Code	Indexed Fields
Keyword Anywhere	GKEY	All 010-9xx fields/subfields
Journal Title	JKEY	130 adfklnoprs 210 ab 222 ab 240 adfklnoprs 243 adfklnoprs 245 abh 246 abfnp 247 abfnp 400 knptv 410 knptv 411 knptv 440 anpv 490 av 700 knpt 710 knpt 711 knpt 730 adfklnoprs 740 anp 773 abqst 776 abst 780 abst 785 abst 800 knptvx 810 knptvx 811 knptvx 830 anpvx

Table A-12. Keyword Index Components

Search Name	Search Code	Indexed Fields
Author Name	NKEY	100 acdjq 110 abcdefgkl 111 acdefgklnpq 400 acd 410 abcdefgkl 411 acdefgkl 700 aqcd 710 abcdefgkl 711 acdefgkl 800 acdjq 810 abcdefgkl 811 acdefgjkl
Series	SERI	400 acdknptv 410 abcdefgklntv 411 acdefgklntv 440 anpv 490 av 760 abst 800 acdknptv 810 abcdefgklntv 811 acdefgklntv 830 anpv
Subject	SKEY	600 abdcfgklmnopqrstvxyz 610 abdcfgklmnoprstvxyz 611 abdcfgjklnpqstvxyz 630 adefgklmnoprstvxyz4 648 avxyz2 650 abcdvxyz24 651 abevxyz4 653 a 655 abcvxyz 662 abcdefgh02468 690 abvxyz 691 abvxyz

Table A-12. Keyword Index Components

Search Name	Search Code	Indexed Fields
Title	TKEY	130 adfklnoprs 210 ab 222 ab 240 adfklnoprs 243 adfklnoprs 245 abh 246 abfnp 247 abfnp 400 knptv 410 knptv 411 knptv 440 anpv 490 av 700 knpt 710 knpt 711 knpt 730 adfklnoprs 740 anp 773 abqst 776 abst 780 abst 785 abst 800 knptvx 810 knptvx 811 knptvx 830 anpvx
ISBN	ISBN	020 ayz
ISSN	ISSN	022 ayz
Personal Name	100A	100 acdq
Corporate Name	110A	110 abcdefgkl
Conference Name	111A	111 acdefgklnpq
Uniform Title (130)	130A	130 adfklnoprs
Title, Key	210A	210 ab 222 ab
Uniform Title	240A	240 adfklnoprs 243 adfklnoprs
Title Proper	245A	245 abh

Table A-12. Keyword Index Components

Search Name	Search Code	Indexed Fields
Title, Varying Form	246A	246 abfnp 247 abfnp
Publisher: Place	260A	260 a
Publisher: Name	260B	260 b
Publisher: Date	260C	260 c
Serial ID (Recordings)	262K	262 k
Matrix/Take Number	262L	262 l
Series: Personal Name	400N	400 acd
Series Title: Personal	400T	400 knptv
Series: Corporate Name	410N	410 abcdefgkl
Series Title: Corporate	410T	410 knptv
Series: Conference Name	411N	411 acdefgkl
Series Title: Conference	411T	411 knptv
Series Title: Title AE	440T	440 anpv 490 av
Subject: Personal Name	600A	600 abcfgklmnopqrstvxyz
Subject: Corporate Name	610A	610 abcfgklmnoprstvxyz
Subject: Conf/Mtg Name	611A	611 abcfgklnpqstvxyz
Subject: Uniform Title	630A	630 adfgklmnoprstvxyz
Subject: Topical	650A	650 abcdvxyz
Subject: Geo. Name	651A	651 abvxyz
Subject: Uncontrolled	653A	653 a
Subject: Genre/Form	655A	655 abcvxyz
Subject: Local	690A	690 abvxyz
Subject: Local Geo.	691A	691 abvxyz
Other Personal Name	700A	700 acdq
Other Personal Name: Title	700T	700 knpt
Other Corporate Name	710A	710 abcdefgkl
Other Corporate Name: Title	710T	710 knpt

Table A-12. Keyword Index Components

Search Name	Search Code	Indexed Fields
Other Conference Name	711A	711 acdefgkl
Other Conference Name: Title	711 T	711 knpt
AE: Uniform Title	730A	730 adfklnoprs
AE: Related Anal. Title	740A	740 anp
Main Series Entry	760A	760 abst
Subseries Entry	762A	762 abst
Original Language Entry	765A	765 abst
Translation	767A	767 abst
Supp/Special Issue Entry	770A	770 abst
Parent Record Entry	772A	772 abst
Host Item Entry	773A	773 abst
Other Edition Entry	775A	775 abst
Addtl. Physical Form	776A	776 abst
Issued with Entry	777A	777 abst
Preceding Entry	780A	780 abst
Preceding Title	780T	780 st
Succeeding Entry	785A	785 abst
Succeeding Title	785T	785 st
Non-Spec. Relationship	787A	787 abst
Series AE: Personal Name	800N	800 acdq
Series AE: Personal Title	800T	800 knptv
Series AE: Corp. Name	810N	810 abcdefghkl
Series AE: Corp. Title	810T	810 knptv
Series AE: Conf. Name	811N	811 acdefgkl
Series AE: Conf. Title	811T	811 knptv
Series AE: Title	830T	830 anpv

Subject Keyword Indexes

Table A-13. Subject Keyword Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields
600A		600	a
610A		610	a
611A		611	a
630A		630	a
650A		650	b
651A		651	a
653A		653	a
655A		655	a
690A		690	a
691A		691	a

Holdings Keyword Indexes

See [Table A-14](#) for the list of index defaults distributed for holdings keyword searches.

Table A-14. Holdings Keyword Indexes

Search Name	Search Code	Indexed Fields
Call Number Keyword	852H	852 h
Special Collections and Archives Code	SPAC	901 a

See [Holdings Keyword Index Searches](#) on [page 8-6](#) and [Holdings Keyword Definitions](#) on [page 8-77](#) for more information.

Left-Anchored Indexes

A left-anchored index search begins from the left side and moves through the character string to the right (minus the non-filing characters if there are any). The left most term is used as the entry point for the search.

Left-anchored index searches performed in the WebVoyáge module are automatically right truncated. Left-anchored index searches in the Cataloging module are not right truncated unless the **Automatic truncation for non keyword searches** check box has been checked on the **Work Flow** tab of the **Session Defaults and Preferences** dialog box.

Any of these individual indexes may be made available for searching in staff modules. Any left-anchored search can be added to the WebVoyáge Basic Search page except for Authority Indexes (refer to the procedure, Changing the Dropdown List of Search Types for Basic Search, in the *WebVoyáge Basic User's Guide*). Modifications to the searches available to your staff and patrons can be made through the Search section of the System Administration module.

The Voyager Search Code cannot be modified. The Search Name may be changed. It has a 40-character maximum.

If you would like to add a left-anchored index or modify a current left-anchored index definition, the Voyager Data Services Group may be able to provide this service for a fee. Create an incident using the eService to place a request or ask for more information regarding this service.

The Indexed Fields indicate the MARC field tag. The Indexed Subfields indicate the subfield(s) in the index.

Left-Anchored Authority Indexes

Only the Search Name may be changed for left-anchored Authority Indexes. You can choose to make these searches available or not make them available in the staff modules.

Authority Indexes are not available in the WebVoyáge module.

Left-anchored Authority Indexes can be deleted. However, you cannot re-create them. Therefore, it is better to staff suppress the searches.

Table A-15. Left-Anchored Authority Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization
A10A	Auth LCCN (010a)	010	a	LCCN normalization characters, Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters

Table A-15. Left-Anchored Authority Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization
A10Z	Auth LCCN (010z)	010	z (repeatable)	LCCN normalization characters, Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters
A22A	Auth ISSN (022a)	022	a	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A22Y	Auth ISSN (022y): Incorrect	022	y (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A22Z	Auth ISSN (022z): Canceled	022	z (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A22L	Auth ISSN-L (022l)	022	l	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A22M	Auth ISSN-L (022m): Canceled	022	m (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-15. Left-Anchored Authority Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization
A24A	Auth Other Std.Ident.(024 a)	024	a	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A24Z	Auth Other Std.Ident.(024 z): Canc/Invld	024	z (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A350	Auth System Number for de-duping (035a)	035	a	(OCoLC)ocm de-duping system number normalization (035), Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters
A35A	Auth System Number (035a)	035	a	System number normalization characters
A35Z	Auth System Number (035z): Cancelled	035	z (repeatable)	System number normalization characters
A43A	Auth Geographic Area Code (043a)	043	a (repeatable)	
A46F	Auth Birth Date (046f)	046	f	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-15. Left-Anchored Authority Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization
A46G	Auth Death Date (046g)	046	g	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A46K	Auth Begin or single date (046k)	046	k	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A46L	Auth End date (046l)	046	l	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A100	Auth Personal Name (100)	100	abcdefghijklm nopqrstvxyz	
A110	Auth Corporate Name (110)	110	abcdefghijklm noprstvxyz	
A111	Auth Meeting Name (111)	111	abcdefghijklnp qstvxyz	
A130	Auth Uniform Title (130)	130	abcdfghklmn oprstvxyz	
A148	Auth Chronological Term (148)	148	avxyz	
A150	Auth Topical Term (150)	150	abgvxyz	
A151	Auth Geographic Name (151)	151	abgvxyz	

Table A-15. Left-Anchored Authority Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization
A155	Auth Genre/ Form Term (155)	155	avxyz	
A162	Auth Med of Perf Term (162)	162	a	
A180	Auth General Subdivision (180)	180	vxyz	
A181	Auth Geographic Subdivision (181)	181	vxyz	
A182	Auth Chron Subdivision (182)	182	vxyz	
A185	Auth Form Subdivision (185)	185	vxyz	
A36A	Auth Content Type Term (336a)	336	a (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A36B	Auth Content Type Code (336b)	336	b (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A70A	Auth Place of Birth (370a)	370	a	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-15. Left-Anchored Authority Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization
A70B	Auth Place of Death (370b)	370	b	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A70C	Auth Associated Country (370c)	370	c (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A70E	Auth Place of Resid/Hqrs (370e)	370	e (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A70F	Auth Other Assoc Place (370f)	370	f (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A70G	Auth Place of Origin of Work (370g)	370	g (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A72A	Auth Field of Activity (372a)	372	a (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-15. Left-Anchored Authority Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization
A73A	Auth Associated Group (373a)	373	a (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A74A	Auth Occupation (374a)	374	a (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A76A	Auth Type of Family (376a)	376	a (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A77A	Auth Language Code (377a)	377	al (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A80A	Auth Form of Work (380a)	380	a (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A81A	Auth Other Distinguishing Char (381a)	381	a (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-15. Left-Anchored Authority Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization
A82A	Auth Medium of Performance (382a)	382	a (repeatable)	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A84A	Auth Key (384a)	384	a	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A700	Auth Personal Name (700)	700	abcdefghijklm nopqrstvxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A710	Auth Corporate Name (710)	710	abcdefghijklm noprstvxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A711	Auth Meeting Name (711)	711	acdefghjklmpq stvxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A730	Auth Uniform Title (730)	730	adefghklmnop stvxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-15. Left-Anchored Authority Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization
A748	Auth Chronological Term (748)	748	avxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A750	Auth Topical Term (750)	750	abvxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A751	Auth Geographic Name (751)	751	avxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A755	Auth Genre/Form Term (755)	755	avxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A780	Auth General Subdivision (780)	780	vxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A781	Auth Geographic Subdivision (781)	781	vxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-15. Left-Anchored Authority Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization
A782	Auth Chronological Subdivision (782)	782	vxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A785	Auth Form Subdivision (785)	785	vxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
A788	Auth Complex Linking Entry (788)	788	a2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Left-Anchored Call Number Indexes

Only the Search Name may be changed with left-anchored Call Number Indexes. You can choose to make these searches available or not make them available in the staff modules.

The CALL index cannot be deleted, but the other Call Number Indexes can be deleted. Be aware, however, that you cannot re-create the other Call Number Indexes if you delete them. Therefore, it is better to staff suppress the searches.

Table A-16. Left-Anchored Call Number Indexes

Voyager Search Code	Search Name	Indexed Fields	Indicator 1 value	Normalization
CALL	Mfhd Call Number	852hi	all	Normalizes the search statement by LC, Dewey, NLM, SuDoc, Other, Codoc, NAL, Cambridge Call Numbers. The first call number type the system normalizes against successfully is the index type we use for the first set of results you retrieve.
MCOD	Mfhd CODOC Classification Number	852hi	c	CODOC call number normalization
MDEW	Mfhd Dewey Classification Number	852hi	1	Dewey call number normalization
MLC#	Mfhd LC Classification Number	852hi	0	LC call number normalization
MNAL	Mfhd NAL Classification	852hi	k	NAL call number normalization
MNLM	Mfhd NLM Classification Number	852hi	2	NLM call number normalization
MOTH	Mfhd Other Classification Number	852hi	8	No normalization, indexes as is. If call number does not normalize to any call number type, will be saved as an Other call number type.
MSUD	Mfhd SUDOC Classification Number	852hi	3	SuDoc call number normalization

Left-Anchored Composite Indexes

Voyager distributes the following as composite indexes. Any of the composite indexes may be made available for searching in staff modules. Modifications to the searches available to your staff and patrons can be made through the Search - Indexes - Composite Definitions section of the System Administration module.

You may choose to delete any single-field index from TALL or JALL but you cannot delete TALL or JALL. The other Composite Indexes can be deleted, but be aware, however, that you cannot re-create the other Composite Indexes if you delete them. Therefore, it is better to staff suppress the searches. See WebVoyage configuration for details on using TALL and JALL.

Table A-17. Left-Anchored Composite Indexes

Voyager Search Code	Search Name	Indexes Included
CODN	CODENS	030A (CODEN) 030Z (Canc/Invalid CODEN)
LCCN	LC Card Numbers	010A (LCCN) 010Z (Invalid LCCN)
ISBL	ISBN Numbers	020A (ISBN) 020Z (Canceled/Invalid ISBN)
ISSL	ISSN Numbers	022A (ISSN) 022L 022M 022Y (Incorrect ISSN) 022Z (Canceled/Invalid ISSN)
STNO	LCCN-ISBN-ISSN (STNO) <	010A, 010Z, 020A, 020N, 020R, 020Z, ISB3, 022A, 022L, 022M, 022Y, 022Z
STRN	STRN Numbers	027A (Std Tech Report No.) 027Z (Canc/Invalid STRN)
PUBN	Publisher Numbers	028A (Publisher Number) 028B (Publisher Number Source) 260D (Music Number)
GPOL	GPO Numbers	074A (GPO Item Number) 074Z (Canceled/Invalid GPO Item Number)
OSIN	Other Standard IDs	024A (Standard Recording Code) 024Z (Canc/Invalid Std Code)
SYSN	System Numbers	035A (System Control Number) 035Z (Canc/Invalid SCN) NOTE: See the <i>Voyager Technical User's Guide</i> for more information regarding the 035 field.

Table A-17. Left-Anchored Composite Indexes

Voyager Search Code	Search Name	Indexes Included
TALL	Title <	1300, 2220, 2400, 2450, 2460, 2470, 4400, 7300, 7400, 7600, 7620, 7670, 7720, 7721, 7730, 7731, 7800, 7850, 8300
JALL	Journal Title <	Same as TALL
NALL	Names	100H, 110H, 111H, 400H, 410H, 411H, 700H, 710H, 711H, 800H, 810H, 811H, 1003
SALL	Subjects	6500, 6501, 6502, 6503, 6504, 6505, 6506, 6507, 600H, 610H, 611H, 630H, 648H, 651H, 654H, 655H, 6620

Name Left-Anchored Indexes

Table A-18. Name Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Fields	Indexed Subfields	Normalization
100H	Personal Name	100	abcdefghijklmnopqtu4	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
110H	Corporate Name	110	abcdefghijklmnop	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-18. Name Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Fields	Indexed Subfields	Normalization
111H	Conference	111	abcdefghijklmnopqtu4	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
400H	Personal Name Series	400	abcdefghijklmnopuv	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
410H	Corporate Name Series	410	abcdefghijklmnopuv	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
411H	Conference Series	411	abcdefghijklmnopuv	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
700H	Personal Name AE	700	abcdefghijklmnopqrstux4	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-18. Name Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Fields	Indexed Subfields	Normalization
710H	Corporate Name AE	710	abcdefghijklmnpstu	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
711H	Conference AE	711	abcdefghijklnpqstux4	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
800H	Personal Name Series AE	800	abcdefghijklmnpqrstuvx4	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
810H	Corporate Name Series AE <	810	abcdefghijklmnpqrstuv	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
811H	Conference Series AE	811	abcdefghijklnpqstuvx4	Right hand trim characters, upper case characters, diacritic normalization characters, punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Subject Left Anchored Indexes

Table A-19. Subject Left-Anchored Indexes

Search Name	Indexed Fields	Indexed Subfields	Normalization
Subject: LCSH	650	abcdevxyz4	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Children's LCSH	650	abcdevxyz4	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: MESH	650	abcdevxyz4	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: NAL	650	abcdevxyz4	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Unspecified	650	abcdevxyz4	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Canadian English	650	abcdevxyz4	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Canadian French	650	abcdevxyz4	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-19. Subject Left-Anchored Indexes

Search Name	Indexed Fields	Indexed Subfields	Normalization
Subject: Other	650	abcdevxyz24	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Name	600	abcdefghjklmnopqrstu vxyz24	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Corporate	610	abcdfgklmnopqrvxyz	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Conference	611	abcdefghjklmnopqstuvxy z24	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Title	630	adeefghklmnoprstvxyz2 4	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Chronicle	648	avxyz2	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Geographic	651	abevxyz24	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Faceted	654	abceevxyz4	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Table A-19. Subject Left-Anchored Indexes

Search Name	Indexed Fields	Indexed Subfields	Normalization
Subject: Genre/Form	655	abvxyz	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Hierarchical Place (6620) <	662	abcdefgh24	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters
Subject: Hierarchical Place (6621) <	662	bcdefgh24	Right hand trim characters, upper case characters, diacritic normalization characters, Punctuation strip characters (NACO rules), single space character or phrase, left hand trim characters

Remaining Left-Anchored Indexes

This list comprises the remaining searchable left-anchored indexes. Any of these indexes can be made available for searching in the staff modules.

You can modify the search name but not the search code or definitions. Modifications to the remaining left-anchored searches available to your staff and patrons can be made through the Search - Indexes - Headings & Left-Anchored section of the System Administration module.

Any left-anchored search can be added to the WebVoyáge Basic Search page except for Authority Indexes (refer to the procedure, Changing the Dropdown List of Search Types for Basic Search, in the *WebVoyáge Basic User's Guide*).

If you would like to add a left-anchored index or modify a current left-anchored index definition, the Voyager Data Services Group may be able to provide this service for a fee. Create an incident using the eService to place a request or ask for more information regarding this service

The remaining left-anchored indexes can be deleted. However, you cannot re-create them. Therefore, it is better to staff suppress the searches.

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
008D	Publication Date (008)	008	character positions 07-10		
008L	Language (008 coded)	008	character positions 35-37		
008P	Publication Place (008 coded)	008	character positions 15-17		
010A	LCCN (010a)	010	a	LCCN normalization characters, Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
010Z	LCCN (010z): Cancelled/Invalid	010		LCCN normalization characters, Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
020A	ISBN (020a)	020	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
020N	ISBN (020a): Number Only	020	a	Index subfield text up to first space, Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Remove space character, Left hand trim characters	
020R	ISBN (020z): Number Only	020	z (repeatable)	Index subfield text up to first space, Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Remove space character, Left hand trim characters	
020Z	ISBN (020z): Cancelled/ Invalid	020	z (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
ISB3	ISBN (ISBN-13s will match ISBN-10s)	020	a	Any ISBN 10 found at the beginning of the indexed text will be converted to the ISBN+13 equivalent. If the number is an ISBN+13, then it will be indexed as is.	
022A	ISSN (022a)	022	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
022L	ISSN, Linking (022L) <	022	l	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
022M	ISSN, Linking/Incorrect (022M) <	022	m (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
022Y	ISSN (022y): Incorrect	022	y (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
022Z	ISSN (022z): Cancelled	022	z (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
024A	Other Std. Ident. (024a)	024	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
024I	ISBN-13 (024a)	024	a	Only index subfields that contain 13 digits and begin with 978 or 979 ignoring parenthetical qualifiers, Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Remove space character, Left hand trim characters	
024Y	ISBN-13 : Cancelled (024z)	024	z (repeatable)	Only index subfields that contain 13 digits and begin with 978 or 979 ignoring parenthetical qualifiers, Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Remove space character, Left hand trim characters	
024Z	Other Std. Ident. (024z): Cancelled/ Invlid	024	z (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
027A	Std. Tech. Rpt. No. (027a)	027	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
027Z	Std. Tech. Rpt. No. (027z): Cancelled/ Invlid	027	z (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
028A	Publisher Number (028a)	028	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
028B	Publisher Number (028b): Source	028	b	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
030A	CODEN (030a)	030	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
030Z	CODEN (030z): Cancelled/ Invalid	030	z (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
0350	System Number for de-duping (035a)	035	a	(OCoLC)ocm de-duping system number normalization (035), Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
0359	Original System Number (0359)	035	9	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
035A	System Number (035a)	035	a	System number normalization characters	
035Z	System Number (035z): Cancelled/ Invalid	035	z (repeatable)	System number normalization characters	
043A	Geographic Area Code (043A) <	043	a (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
074A	GPO Item Number (074a)	074	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
074Z	GPO Item Number (074z): Cancelled/ Invid	074	z (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
1300	Uniform Title ME <	130	adfgghklmnoprst	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	1
1301	Uniform Title ME: Title <	130	alnps	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	1
1302	Uniform Title ME: Name of Pt <	130	p	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
2100	Title, Key Abbreviated <	210	ab	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
2110	Title, Shortened <	211	ab	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2
2120	Title, Variant Access <	212	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
2140	Title, Augmented <	214	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
2220	Title, Key <	222	ab	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2
2400	Uniform Title <	240	adfgghklmnoprs	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2
2401	Uniform Title: Title <	240	alnps	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2
2402	Uniform Title: Name of Part <	240	p	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
2450	Title Statement <	245	abfghknps	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2
2451	Title Statement: Title <	245	ab	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2
2452	Title Statement: Medium <	245	abh	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2
2460	Title, Varying Form <	246	abfghnp	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
2470	Title, Former <	247	abfghnpx	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
260D	Music Number (260d)	260	d	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
336A	Content Type: Term (336A) <	336	a (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
336B	Content Type: Code (336B) <	336	b (repeatable)	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
337A	Media Type: Term (337A) <	337	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
337B	Media Type: Code (337B) <	337	b	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
338A	Carrier Type: Term (338A) <	338	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
338B	Carrier Type: Code (338B) <	338	b	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
4000	Series Title: Personal <	400	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
4100	Series Title: Corporate <	411	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
4110	Series Title: Conference <	411	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
4400	Series Title: Title AE <	440	anpvx	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
440A	Series Title: Title only (440a)	440	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2
600T	Personal Name Subject: Title <	600	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
648H	Subject: Chronological	648	avxyz	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
6900	Local Subject	690	abcdvxyz	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
700X	Other Personal Name: Title <	700	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
710X	Other Corporate Name: Title <	710	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
711X	Other Conference Name: Title <	711	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
7300	Uniform Title AE <	730	adfg hklmnoprstx	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	1

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
7301	Uniform Title AE: Title <	730	alnps	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	1
7302	Uniform Title AE: Name of Part <	730	p	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
7400	Uncont. Title AE <	740	ahnp	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	1
7401	Uncont. Title AE: Name of Part <	740	p	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
7402	Uncont. Title AE (\$a)<	740	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
7600	Main Series Entry <	760	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
7620	Subseries Entry <	762	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
7670	Translation (767) <	767	abst	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
7720	Parent Record Entry <	772	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
7721	Parent Record Entry: Title <	772	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
7730	Host Item Entry <	773	a	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
7731	Host Item Entry: Title <	773	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
7800	Preceding Title (780t) <	780	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
7850	Succeeding Title (785t) <	785	t	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
8000	Series AE: Personal <	800	fghklmnoprstvx	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
8100	Series Corporate: Title (8100) <	810	dfghklmnoprstvx	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	

Table A-20. Remaining Left-Anchored Indexes

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields	Normalization	Nonfiling Indicator (if applicable)
8110	Series AE: Conference <	811	fghklnpstvx	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	
8300	Series AE: Uniform Title <	830	adfgghklmnoprstvx	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2
8301	Series AE: UT: Title <	830	alnps	Right hand trim characters, Upper case characters, Diacritic normalization characters, Punctuation strip characters (NACO rules), Single space character or phrase, Left hand trim characters	2

Choices for Search Results

Every search index in Voyager has a Search Results tab. This controls which columns display on the Titles List result page in WebVoyáge and staff modules. If the search is a headings search, the search results are those for the subsequent index display after selecting from the headings list.

Only three elements can be assigned for any one Search Name. For example, for a Title Left-Anchored (TALL) search, you may define that the columns Full Title, Author, and Date display in the Titles List.

The list of available Search Results is from the BIB_TEXT table in Voyager. [Table A-21](#) defines which MARC fields are included in the BIB_TEXT field. These cannot be altered.

Table A-21. Choices for Search Results

bib_text Field Name	Length¹	WebVoyage	Initial WebVoyage Display Name	MARC Fields
author	255	yes	Author	100 abcdkq (a->t) 110 abcdgkn (a->t) 111 abcdegknq (a->t) 700 abcdkqn (a->t) (citation databases only) 710 abcdgkn (a->t) (citation databases only) 711 abcdegknq (a->t) (citation databases only)
title	255	yes	Title long	abcfghknps
uniform_title	255	yes	Uniform title	130 adfgklmnoprs 240 adfgklmnoprs 243 adfgklmnoprs
edition	100	yes	Edition	250 (all)
pub_place	100	yes	Publication place	260 a or 264 a
publisher	150	yes	Publisher	260 b or 264 b
isbn	50	yes	ISBN	020 a
issn	20	yes	ISSN	022 a
publisher_number	40	yes	Publisher number	028
lccn	20	yes	LCCN	010

Table A-21. Choices for Search Results

bib_text Field Name	Length¹	WebVoyage	Initial WebVoyage Display Name	MARC Fields
network_number	30	yes	OCLC number	035 a
series	255	yes	Series	440 anpv 400 abcdqtnplkgfv 410 abcdgtnplkfv 490 av
coden	6	yes	CODEN	030 a
gponum	20	yes	GPO number	074 a
stdtech	30	yes	Report number	027 a
other_std_num	30	yes	Standard number	024 a
begin_pub_date	4	yes	Date	008/07-10
bib_format	2	yes	Format	Leader/06-07
title_brief	150	yes	Title	245 ab
imprint	200	yes	Imprint	260 abc or 264 abc
pub_dates_combined	9	yes	Dates	008/07-10 'hyphen' 008/11-14
publisher_date	25	yes	Publisher Date	260 c or 264 c
record_status	1	no		Leader/05
encoding_level	1	no		Leader/17
descrip_form	1	no		Leader/18
date_type_status	1	yes	Type of Date/ Publication Status ^c	008/06
map_math_data	255	yes	Cartographic Mathematical Data	255a
map_projection	2	yes	Map Projection ^c	008/22-23
place_code	3	yes	Publication Place Code ^c	008/15-17

Table A-21. Choices for Search Results

bib_text Field Name	Length¹	WebVoyage	Initial WebVoyage Display Name	MARC Fields
stock_number	50	yes	Stock Number	037a
field_008	40	no		008/00-39
*owning library	80	yes	Library	*bib_master

1 The element contains the first n number of characters in the field (ignoring sub-fields). The actual number of characters displayed is dependent upon available space on screen. For example, if you choose three elements to display, the system allocates space for three columns using one line per item and making it unlikely that a 100-character element, for example, would be displayed in full.

Z39.50 Attribute Codes

B

Overview

An attribute defines access points that are used only in the construction of Z39.50 queries. Establishing access points is a requisite part of creating a connection to a target database via Z39.50. This determines what kind of data is returned as the result of a specific query.

[Attributes Supported For Connection From Voyager Clients To Z39.50 Databases](#) on [page B-2](#) lists all the attribute codes that are available for use by Voyager when establishing connections to a target database via Z39.50 that your institution intends to search.

These are the attributes that you use when setting up your Database Definitions in the System Administration module. However, whether or not the attribute codes will actually work when establishing a connection to a specific database depends on whether or not the attribute codes are supported by that specific database.

[Attributes Supported For Connection to Voyager Z39.50 Server](#) on [page B-12](#) lists all the attribute codes that can be used by other sites when establishing connections to your Voyager Z39.50 server. These attributes are not used for setting up your Database Definitions in the System Administration module. Rather, this list is provided so that you will be able to inform other sites that want to connect to your Z39.50 server of the attributes that your Z39.50 server supports.

Attributes Supported For Connection From Voyager Clients To Z39.50 Databases

The following attribute types are supported:

- Use
- Relation
- Position
- Structure
- Truncation
- Completeness

The Use attribute, if provided, identifies a set of bibliographic access points against which the term is to be matched.

The Relation, Completeness, Truncation, and Position attributes, if provided, specify additional match criteria.

The Structure attribute, if provided, identifies the form in which the term has been supplied.

You can find the following lists at: `ftp://ftp.loc.gov/pub/z3950/defs/bib1.txt`.

Standard Z39.50 Bibliographic Use Attributes

[Table B-1](#) details the established bibliographic Z39.50 Use attributes only for Voyager databases.

Table B-1. Standard Z39.50 Bibliographic Use Attributes (Page 1 of 5)

Value	Use
1	Personal name
2	Corporate name
3	Conference name
4	Title
5	Title Series
6	Title Uniform
7	ISBN
8	ISSN

Table B-1. Standard Z39.50 Bibliographic Use Attributes (Page 2 of 5)

Value	Use
9	LC card number
10	BNB card no.
11	BGF number
12	Local number
13	Dewey Classification
14	UDC classification
15	Bliss classification
16	LC call number
17	NLM call number
18	NAL call number
19	MOS call number
20	Local classification
21	Subject Heading
22	Subject Rameau
23	BDI index subject
24	INSPEC subject
25	MESH subject
26	PA subject
27	LC subject heading
28	RMV subject heading
29	Local subject index
30	Date
31	Date of publication
32	Date of acquisition
33	Title key
34	Title collective
35	Title parallel
36	Title cover
37	Title added title page

Table B-1. Standard Z39.50 Bibliographic Use Attributes (Page 3 of 5)

Value	Use
38	Title caption
39	Title running
40	Title spine
41	Title other variant
42	Title former
43	Title abbreviated
44	Title expanded
45	Subject precis
46	Subject rswk
47	Subject subdivision
48	No. nat'l biblio.
49	No. legal deposit
50	No. govt pub.
51	No. music publisher
52	Number db
53	Number local call
54	Code–language
55	Code–geographic area
56	Code–institution
57	Name and title
58	Name geograpic
59	Place publication
60	CODEN
61	Microform generation
62	Abstract
63	Note
1000	Author-title
1001	Record type
1002	Name

Table B-1. Standard Z39.50 Bibliographic Use Attributes (Page 4 of 5)

Value	Use
1003	Author
1004	Author-name-personal
1005	Author-name-corporate
1006	Author-name-conference
1007	Identifier–standard
1008	Subject–LC children's
1009	Subject name–personal
1010	Body of text
1011	Date/time added to db
1012	Date/time last modified
1013	Authority /format id
1014	Concept-text
1015	Concept-reference
1016	Any
1017	Server-choice
1018	Publisher
1019	Record-source
1020	Editor
1021	Bib-level
1022	Geographic-class
1023	Indexed-by
1024	Map-scale
1025	Music-key
1026	Related-periodical
1027	Report-number
1028	Stock-number
1030	Thematic-number
1031	Material-type
1032	Doc-id

Table B-1. Standard Z39.50 Bibliographic Use Attributes (Page 5 of 5)

Value	Use
1033	Host-item
1034	Content-type
1035	Anywhere
1036	Author-Title-Subject

Relation Attributes

Relation attributes (see [Table B-2](#)) describe the relationship of the access point (left side of the relation) to the search term as qualified by the attributes (right side of the relation) such as Date-publication <= 1975.

Table B-2. Relation Attributes (Page 1 of 2)

Relation	Value	Definition
Less than	1	Meaningful only when both the term value as qualified by the attributes and the access point can be realized as elements of a set that has an inherent implied order.
Less than or equal	2	Meaningful only when both the term value as qualified by the attributes and the access point can be realized as elements of a set that has an inherent implied order.
Equal	3	Specifies an exact match (subject to possible qualification by the truncation or structure attributes).
Greater or equal	4	Meaningful only when both the term value as qualified by the attributes and the access point can be realized as elements of a set that has an inherent implied order.
Greater than	5	Meaningful only when both the term value as qualified by the attributes and the access point can be realized as elements of a set that has an inherent implied order.
Not equal	6	
Phonetic	100	Phonetic refers to a match based on aural similarity such as a Soundex. The match algorithms are defined by the target.

Table B-2. Relation Attributes (Page 2 of 2)

Relation	Value	Definition
Stem	101	Stem refers to a lexical or linguistic match. The term is compared with words in a record to find those with the same stem. The match algorithms are defined by the target
Relevance	102	Use to select records that are relevant to the term. When used, the Use attribute determines what portion of a record is to be evaluated for relevance. The relevance algorithm is defined by the target.
AlwaysMatches	103	When the relation attribute AlwaysMatches occurs: • The target ignores the supplied term. • If the use attribute is any or anywhere, then all records are to be selected. • If a use attribute other than any or anywhere is supplied, all records are selected for which the access point corresponding to the supplied Use attribute is meaningful. For example if the Use attribute is Title, all records that have a title field are selected.

Position Attributes

The Position attribute (see [Table B-3](#)) determines the placement of the term in the field.

Table B-3. Position Attributes

Position	Value	Definition
First in field	1	Search term must be the first data in the field.
First in subfield	2	Search term may display in any subfield but must be the first data in the subfield in which it displays.
Any position in field	3	Search term may display any place in the field.

Structure Attributes

The Structure attribute (see [Table B-4](#)) specifies the type of search term (for example a single word, a phrase, several words to be treated as multiple, single terms and so on).

Table B-4. Structure Attributes (Page 1 of 2)

Structure	Value	Definition
Phrase	1	A phrase consists of one or more groups of characters separated by blanks (for example, ASCII hex 20). The value to be searched is exactly as it appears in the search term with respect to order and adjacency. Word(s) in the phrase may be explicitly truncated. To indicate that additional words may appear in the access point, use the completeness attribute.
Word	2	A word consists of a group of non-blank characters. It specifies the exact text of the value to be searched, unless the word is explicitly targeted. A word search term contains no blanks.
Key	3	A key specifies a sequence of characters extracted from those characters contained in an indexed word but not necessarily representing complete words. In the term, key segments should be separated by a blank (ASCII hex 20). Each key segment should be a segment of the original system, not exceeding 6 characters. For example, a name/title derived key search term for Copland, Aaron, 1900-Rodeo could be coplan rodeo. A segment may be adjusted by the target to the length required for the target indexes.
Year	4	A year search term is numeric and contains 4 digits.
Date (normalized)	5	The day, month, year, and time when a transaction or event takes place. The date search term structure is as defined for Generalized Time in ASN.1 (ISO 8824) except that the only mandatory portion of the string is the 4-digit representation of the year.
Word List	6	A word list consists of one or more words separated by blanks (for example, ASCII hex 20). No order of the words is implied. the attributes (other than structure) that are associated with the search term apply to each word in the word list. Any words in a word list may be explicitly truncated. The relationship between the words in a word list is target specific.

Table B-4. Structure Attributes (Page 2 of 2)

Structure	Value	Definition
Date (un-normalized)	100	The day, month, and year when a transaction or event takes place. The un-normalized search term is unstructured.
Name (normalized)	101	A name search term that is structured in a particular order (for example, last name, first name). The resulting term is subject to special matching rules on the target system that differ from those applied to names structured as phrases or unstructured names.
Name (un-normalized)	102	A name search term that is unstructured (for example, first_name last_name). However, the resulting term is subject to matching rules on the target system that differ from those applied to phrases or structured names. For example, the term john smith might be searched by the target as smith, j#.
Structure	103	The term has a structure that is either implied by the Use attribute or defined by the target.
Urx	104	The term is a document identifier such as an identifier extracted from a Z39.50 URL.
Free-form-text	105	The term is text input by the end user. May be used, for example, for relevance feedback.
Document-text	106	The term is text extracted from a document. May be used for example, for relevance feedback.
Local-number	107	A number significant to the target.
String	108	The entire term is to be treated as a string rather than a sequence or set of individual words.
Numeric string	109	The term is a character string that represents a number.

Completeness Attribute

The Completeness attribute (see [Table B-5](#)) specifies that the contents of the search term represent a complete or incomplete subfield or a complete field. Completeness indicates whether additional words should appear in the field or subfield with the search term. Note the difference from Truncation, which handles characters added to words, phrases or strings. For the purpose of describing the

Completeness attributes, when the expressions field or subfield do not have another understood meaning (as prescribed, for example, by the schema in use) these two expressions are used as follows:

Table B-5. Completeness Attribute

Expression	Meaning
Subfield	Has no meaning and the Completeness attribute incomplete subfield is used to mean incomplete field.
Field	Refers to the portion of the record to which the access point refers.

[Table B-5](#) details the Values available for Completeness Attributes.

Table B-6. Completeness Attribute Values

Completeness	Value	Definition
Incomplete subfield	1	Words other than those in the search term may display in the subfield or field in which the term displays.
Complete subfield	2	No words other than those in the search term should display in the entire subfield in which the term displays, but additional words may display in other subfields in the field.
Complete field	3	No words other than those in the search term should display in the entire field in which the term displays.

Truncation Attributes

The Truncation attribute (see [Table B-7](#)) specifies whether one or more characters may be omitted in matching the search term in the target system at the position specified by the Truncation attribute. For example, a word in a search term may be:

- Right truncated in which case the word is treated both as a complete word and as the beginning of a longer word.
- Left truncated in which case the word is treated as a complete word and the ending of a longer word.
- Left and right truncated in which case the word is treated as a complete word at the beginning or ending of a longer word.

- Embedded truncation in which case the word is treated as a complete word and as a longer word with additional characters at the point where the truncation symbol, #, displays in the search term.

For right truncation, left truncation, and left and right truncation, the characters affected by the truncation are determined by the value of the Structure attribute.

Table B-7. Truncation Attribute Values

Truncation	Value	Structure Attribute	Definition
Right Truncation	1	Word or Phrase String Word List	Last word of term is right truncated. Entire term is right truncated. Each word is right truncated.
Left Truncation	2	Word or Phrase String Word or List	First word of term is left truncated. Entire term is left truncated. Each word is left truncated.
Left and Right Truncation	3	Word or Phrase String Word List	The first word of the term is left truncated and the last word of the term is right truncated. Entire term is left and right truncated. Each word is left and right truncated.
Do not truncate	100		No truncation is to be applied.
Process # in search term	101		The search term contains the symbol # (ASCII hex 23) to show where truncation will take place (for example, National H# Institute or d#on).
RegExpr-1	102		The term is in the form of a regular expression as prescribed by IEEE 1003.2 Volume 1, Section 2.8 "Regular Expression Notation."
RegExpr-2	103		The term is in the form of a regular expression whose format is target defined.

Attributes Supported For Connection to Voyager Z39.50 Server

For your reference, [Table B-8](#) is a list of all attribute codes that can be used by other sites when establishing connections to your Voyager Z39.50 server. These attributes are not used for setting up your Database Definitions in the System Administration module. Rather, this list is provided so that you are able to inform other sites that want to connect to your Z39.50 server of the attributes that your Z39.50 server supports.

Position corresponds to the **Position Attribute** field on the **Attribute** tab of the **Database Definitions** dialog box. While Voyager uses Left Anchored versus keyword to discriminate between types of searches, Z39.50 uses numeric values. The attributes are defined as follows:

- 1 = First in field
- 2 = First in subfield
- 3 = Any position

The Truncation attributes correspond to the following:

- 1 = No truncation
- 100 = Right truncation

The Relation attribute corresponds to the following:

- 3 = Equal
- 102 = Relevance

The Structure attribute corresponds to the following:

- 1=Phrase

The Completeness attribute corresponds to the following:

- 1 = Incomplete subfield

[Table B-8](#) details the attributes supported by Voyager, in connections coming in to Voyager.

Table B-8. Supported Voyager Incoming Attributes (Page 1 of 3)

Use Attribute	Search Type	Position	Truncation	Relation	Structure	Completeness
1	Personal Name	3	1,100	3	1	1
2	Corporate Name	3	1,100	3	1	1

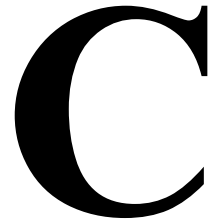
Table B-8. Supported Voyager Incoming Attributes (Page 2 of 3)

Use Attribute	Search Type	Position	Truncation	Relation	Structure	Completeness
3	Conference Name	3	1,100	3	1	1
4	Title	1,3	1,100	3	1	1
5	Series Title	1,3	1,100	3	1	1
6	Uniform Title	1,3	1,100	3	1	1
7	ISBN	1,3	1,100	3	1	1
8	ISSN	1,3	1,100	3	1	1
9	LCCN	1,3	1,100	3	1	1
12	Local Number	3	1	3	1	1
13	Dewey Call Number	1	1,100	3	1	1
16	LC Call Number	1	1,100	3	1	1
17	NLM Call Number	1	1,100	3	1	1
20	Other Call Number	1	1,100	3	1	1
21	Subject	3	1,100	3	1	1
31	Publisher: Date	3	1,100	3	1	1
33	Title, Key	3	1,100	3	1	1
41	Title, Varying Form	1,3	1,100	3	1	1
42	Title, Former	1,3	1,100	3	1	1
43	Title, Key Abbreviated	1	1,100	3	1	1
50	GPO Number	1	1,100	3	1	1
51	Music Number	1	1,100	3	1	1
59	Publisher: Place	3	1,100	3	1	1
60	CODEN	1	1,100	3	1	1
1003	Author	3	1,100	3	1	1
1009	Subject Name-Personal	3	1,100	3	1	1
1016	Keyword Anywhere	3	1,100	3, 102	1	1

Table B-8. Supported Voyager Incoming Attributes (Page 3 of 3)

Use Attribute	Search Type	Position	Truncation	Relation	Structure	Comple teness
1018	Publisher:Name	3	1,100	3	1	1
1035	Keyword Anywhere	3	1,100	3	1	1

Embedded Order Data



Introduction

The Voyager Embedded Order Data (EOD) feature is designed to streamline order processing. With its open flexible mapping options, any Voyager library receiving MARC bibliographic records with order details from any vendor can take advantage of automatically creating orders in Voyager from the embedded order data. This feature is especially useful for the following:

- Processing approval orders
- Processing firm orders
- Processing added/updated items that are provided by shelf-ready vendors

The Voyager Embedded Order Data feature works as a component of Bulk Import. Additional setup options are available within the Bulk Import Rules to accommodate the creation of orders from embedded order data. See [Bulk Import Rules](#) on [page 4-41](#) for more information regarding Bulk Import Rules setup.

EOD can create the following records in a single import procedure:

- Bibliographic records
- MFHDs
- Items (optional)
- Purchase order and line items

NOTE:

You may want to consult the *Voyager Acquisitions User's Guide*, *Voyager Technical User's Guide*, and other sections of this user's guide when reading this Appendix. EOD is an integrated function that utilizes many aspects of the Voyager system.

Creating Orders with EOD

In general, the process for building orders from embedded order data includes the following preparations or steps.

- Work with the vendor to get order data embedded into your source records.
- Define a Bulk Import Rule in Voyager System Administration to pull the embedded order data from the vendor records. See [Bulk Import Rules](#) on [page 4-41](#) for more information.

NOTE:

This step does not need to be repeated every time orders are created with Bulk Import. However, additional rules may be created when working with a new vendor or new vendor information.

(All other import options in the Cataloging section of Voyager System Administration such as duplicate detection and call number hierarchy need to be entered as usual.)

- Retrieve the source file(s) containing embedded order data.
- Run the Bulk Import program from the server or via WebAdmin.
See the *Voyager Technical User's Guide* for more information about running Bulk Import.
- Check for any errors in the Bulk Import logs.
- Use the Acquisitions module to review/check the imported purchase order information.
- Approve the purchase order and complete the purchase order process according to your policies and procedures.
- Optionally, automatically approve POs upon loading for both Single MFHD and Multiple MFHD profiles (see [Profiles tab options](#) on [page 4-49](#)).
 - If a PO is created for each record, then the PO is approved as soon as the record is imported
 - If a PO is created for the whole file, then the PO is approved when the whole file is loaded

NOTE:

The PO is approved using the same rules as approving the PO in the client. If the PO can't be approved for some reason, the reason is logged and the PO is left in the Pending state. The log shows the PO number and the PO ID so that staff can find/resolve the problem later.

Bulk Import Rules

The setup for Bulk Import Rules builds on many existing options in Voyager System Administration. Some examples include the following:

- Bibliographic Duplicate Detection Profiles
- Locations
- Purchase Order Types
- Currency

Planning, therefore, is required to confirm that all necessary options have been set up in order to complete the definition of a Bulk Import Rule for importing embedded order data.

EOD bulk import processing may require additional setups. You may want to set up special bibliographic duplicate detection profiles specific to EOD processing.

For example, some libraries prefer to have their vendors supply very basic bibliographic records with embedded order data for bulk importing order data information into their Acquisitions system. The Multiple MFHD profile method (see [Profiles tab options](#) on [page 4-49](#)) also allows for updating MFHD and item records.

Subsequently, these libraries bulk import bibliographic records for the same materials from another, expert source, and replace the EOD bibliographic records with the new, more complete ones from their expert source. Using this type of workflow requires careful attention to duplicate detection profiles.

EOD Source File(s)

Using embedded order data implies that the library has some source for receiving the order data. Many vendors are able to provide MARC 21 formatted records with the necessary order data to create orders automatically in Voyager.

Commonly, vendors save order data in the 9XX fields of a MARC 21 bibliographic record, for example. It is important that you work closely with the vendor to understand where the data is stored (in traditional MARC fields or 9XX fields) in order to create the mapping needed through Bulk Import Rules. See Step [10](#) on page [4-67](#) for more information about mapping.

EOD and Bulk Import Logs

An important part of the final step in creating orders with EOD is to review the logs that are generated as a result of running Bulk Import. These logs help you identify any errors that may have occurred during the import process. Specifically, the import.log file notifies you of any errors in general as well as when a particular bibliographic record or line item is not added.

NOTE:

If a line item is not added due to a problem with the Bulk Import Rule for embedded order data, the bibliographic record may still be added to the database.

If necessary, **Bulk Import** can be run again with parameters set to import only a single record to correct an individual error. See the *Voyager Technical User's Guide* for more information regarding importing files and related parameters.

Purchase Order Content

With each run of Bulk Import that includes embedded order data, the system uses the Bulk Import Rule settings (see the [Bulk Import Rules](#) section starting on page [4-41](#)) to determine how to handle purchase orders.

With Bulk Import, you can:

- Create a single Purchase Order for all bibliographic records in a file, and assign the PO an internal Voyager PO number.
- Create a separate PO for each record in the file with a PO number either assigned by your institution or by the vendor.

With the PO number settings for Orders in [Bulk Import Rules](#) (see [Table 4-23](#) on [page 4-58](#)), the PO numbering is handled as follows:

- The PO number parameter takes a MARC field, subfield, and indicator pair. There is no default. The PO number parameter may be left blank in the profile on the Catalog Bulk Import Order Settings dialog box (see [Figure 4-20](#) on [page 4-57](#)).

- When loading bibliographic records, bulk import extracts the PO number from the first occurrence of the appropriate MARC subfield and uses it as the PO number of newly created POs.

If the profile is blank (see [Figure 4-20](#) on [page 4-57](#)) or the field does not exist in the incoming record, the newly created POs use the database sequence number as the PO number.

- If the Create one PO per bibliographic record option is set (see [Figure 4-15](#) on [page 4-48](#)), the PO number in each bibliographic record is used as the PO number for the individual POs.

If no PO number is provided per the bibliographic record, the newly created PO-per-bibliographic record uses the database sequence number as the PO number.

Assumptions/Background

Effective January 1, 2007, the International Standard Book Number (ISBN) expands from a 10-digit number to a 13-digit number. The new ISBN is the same as the European Article Number (EAN) which is represented as a barcode printed on most trade and paperback books.

Voyager ISBN support includes indexing support for 13-digit ISBNs in the 020±a and ±z, the 024 3 _±a and ±z, and in EDI (Electronic Data Interchange) messages.

The book industry uses 978 or 979 as prefixes for the EAN. The expanded 13-digit ISBN standard also uses 978 or 979 as prefixes.

EDItEUR, the group responsible for standardizing EDI messages, published a series of recommendations for libraries and vendors as the library community moves to the 13-digit ISBN.

Voyager ISBN-13 Support

The Voyager implementation of ISBN-13 support includes changes that affect the following.

- Indexes
- EDI/Acquisitions

Indexes

With ISBN-13 support, the list of search indexes expands to include the following.

- 024I
- 024Y
- ISB3

See [Table D-1](#) for a description of these indexes.

Table D-1. ISBN-13 Support Indexes Added

Code / Name	Description
024I * ISBN-13 (024a)-Indicator 3	Single-field, left-anchored index for 024 3_#a. NOTE: Only subfields that contain 13 digits and begin with 978 or 979 are indexed; and only the 13 digits are indexed. Any parenthetical qualifiers are ignored.
024Y * ISBN-13 : Cancelled (024z)-Indicator 3	Single-field, left-anchored index for 024 3_#z. NOTE: Only subfields that contain 13 digits and begin with 978 or 979 are indexed; and only the 13 digits are indexed. Any parenthetical qualifiers are ignored.
ISB3 * ISBN (ISBN-13s will match ISBN-10s)	Single-field, left-anchored index for 020#a. See ISB3 Left-Anchored Indexing / Searching on page D-3 and Deduplication on page D-3 for more information.
NOTE: * This code may vary on your system if, at installation, this code already exists. The Voyager installation script automatically adjusts the index code when duplicate existing codes are encountered on your system.	

To ensure appropriate indexing, Voyager maintains a composite index that contains both the 020#a and the 024 3_#a if the EAN begins with 978 or 979. This composite index updates the existing ISBL index.

NOTE:

There are no changes made by the Voyager system to MARC records as a result of ISBN conversions.

ISB3 Left-Anchored Indexing / Searching

Voyager provides an additional left-anchored index, ISB3, that consolidates ISBNs in the ISBN-13 format with ISBN-10 formatted data that is converted/normalized to the ISBN-13 format. The new index is named "ISBN (ISBN-13s will match ISBN-10s)."

Search text entered to search the ISB3 index is converted/normalized using the same rules followed to create the ISB3 index. As a result, the enduser may enter either ISBN-10 or ISBN-13 formatted data in searches utilizing the ISB3 index to find matching data.

Deduplication

The ISB3 index may be used in deduplication profiles.

When the ISB3 index is used in a deduplication profile, incoming records with ISBN-13 formatted data in the 020 fields match existing records with the equivalent ISBN-10 formatted data in the 020 field even when the existing records do not contain ISBN-13 formatted data. The ISB3 index is built to handle these occurrences.

Keyword Indexing / Searching

When building the keyword index, the bibliographic record's 020\$a is examined for ISBN-10 formatted data. Prior to building the index, a process is used to duplicate and convert data in a manner that generates indexed data that enables the enduser to complete a keyword search for either the ISBN-10 or ISBN-13 form of the data.

NOTE:

Any duplicate data is only used for building the index and is not stored in the database.

EDI/Acquisitions

The 10-digit ISBN is transmitted in the EDI message's PIA (additional product information) segment, while the 13-digit ISBN is expected to be located in the LIN (line item) segment as it has always been. Since 13-digit ISBNs are ordinary EAN numbers, they are coded as EANs, not as ISBNs, within EDI messages.

Invoices

In EDI invoices, Voyager recognizes the ISBN-13 in the LIN element, qualified as an EAN. The format is as follows.

LIN+5+9781234567890:EN

Invoices may have contained these LIN values in the past since they are valid EANs now.

When incoming EDI invoices are loaded, Voyager attempts to match invoice line items with purchase order line items using a variety of criteria that includes the ISBN values.

Voyager continues to match the 10-digit ISBN in the PIA segment with the values in the 020A index.

If there is no PIA value, Voyager uses the EAN value in the LIN segment and attempts a match with the 024A index for a 13-digit ISBN. If there is no match with the 024A index, the 020A index is searched for a matching 13-digit ISBN.

Purchase Orders

When Voyager generates purchase orders, the ISBN from the first 020A of the MARC record is placed in the EDI PIA segment with an IB suffix. Previous versions of Voyager used the same method for populating the PIA segment. After the library community fully shifts to ISBN-13, Ex Libris may consider eliminating this procedure in favor of storing the 13-digit ISBN in the LIN segment.

If there is no 020A found in the MARC record, Voyager looks for a value in the 024 3_ that begins with 978 or 979 and places it in the LIN segment qualified as an EAN. Only the first 024 3_ found is placed in the LIN segment.

Additionally if the source purchase order line item has a Vendor title number, it is placed as always in a PIA field with a suffix of SA even if it seems to be a 10- or 13-digit ISBN.

Consistent with pre-existing rules, Voyager uses the first ISBN in a record when generating EDI purchase orders. This rule also applies to records that contain both a 10-digit ISBN in the 020A and a 13-digit ISBN (EAN) in the 024A. Voyager treats the 020A and the 024A as repeated ISBNs.

Serial Claims and Claim Responses

No changes have been made to the EDI processing for serials claims and claim responses since these types of messages should not contain ISBN data.

Monographic Claims and Claim Responses

Support for monographic claims and claims responses via EDI remains consistent with the support provided in Voyager 5.0.

Acquisitions/Reporter Purchase Order Line Printing

Support is provided in Acquisitions and Reporter for printing 10-digit and 13-digit ISBNs from the 020±a when the operator chooses the ISBN as the standard number to print.

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