



## Voyager: Get To Know Circulation

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Voyager Customer Support

# Voyager

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## **Learn:**

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- what Circulation is for;
- Patron and Item records;
- recording Fines/fees;
- charging/discharging materials;
- placing holds and recalls;
- course reserves; and
- how Circulation fits into Voyager

## **About Circulation**

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- Libraries lend materials out to patrons
- Voyager Circulation keeps track of
  - who has borrowed materials and for how long
  - who is waiting to borrow a particular item
  - who has fines and for how much
  - course reserves

## Patrons

- Patron record for each person using library
- Patrons assigned to Patron Groups. Patron Groups part of what determine rules for borrowing materials and fines. (set up in SysAdmin)
- Must have active barcode and at least one address on file



## Patrons

- Proxy patrons: patron authorized to borrow on behalf of another patron – Professor can have grad assistant go to library to borrow books for her
- Can search for patrons by name, barcode, ID

Barcode	Patron Group	Status/Date	Operator Id
R000	Faculty	Active - 2/12/2010	dema



## Items

The screenshot shows the 'Item Record' window with the following details:

Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
Reference Department	book	Not Charged			0	20569

Bibliographic details:

- Author: Véliz, Claudio
- Publisher: Praeger
- Place/Date: New York, 1998
- Series: Handbooks to the modern world
- System No.: jpcn0030235
- LCDN: 68014143
- Owning Library: Training/Master DB

Contains bibliographic, holdings and item information as well as status and request information. Must have a barcode in order to be charged.



## Fines/fees

- Item past due date, assessed overdue fine
- Lost item, can be charged replacement fee

• Can check patron record to see fines/fees owed and what for

The screenshot shows the 'Patron Fines/Fees' window for patron Hugh Jones. The 'Outstanding Fines/Fees' table is as follows:

Date	Title	Barcode	Fees/Posting Type	Fee	Posting	Balance	Location
2/11/2010 09:35 AM	Saville	1767836	Lost Item Replacement	\$10.00		\$10.00	Circulation Desk
2/11/2010 09:35 AM	Vernon god life	13496313	Lost Item Processing	\$15.00		\$15.00	Circulation Desk
2/11/2010 09:35 AM	Vernon god life	13496313	Lost Item Replacement	\$10.00		\$10.00	Circulation Desk
2/11/2010 09:35 AM	Saville	1767836	Lost Item Processing	\$15.00		\$15.00	Circulation Desk

Summary: Total fines deployed \$50.00, Total Due \$50.00

Charge Date: E/16/2008 07:58 AM, Operator: [blank]  
 Due Date: E/16/2008 11:58 PM, Location: Circulation Desk  
 Billed: [blank]

## Circulating materials: Charge

- When a patron wants to borrow an item, he takes it to circ desk to "check out" the item from library – in Voyager-speak, the item is "Charged" to his account.



Charge screen

Title	Item Barcode	Due Date	Status
Journey cake, hot illustrated by Robert McDoskey	54911	3/16/2011 01:59 AM	C

Status of item is now "Charged"

Item assigned due date



## Circulating materials: due dates

Item given due date based on item type (assigned in CAT), patron's patron group (CIRC), current circulation calendar (SysAdmin)

Settings at right in SysAdmin:  
faculty (patron group)  
book (item type)

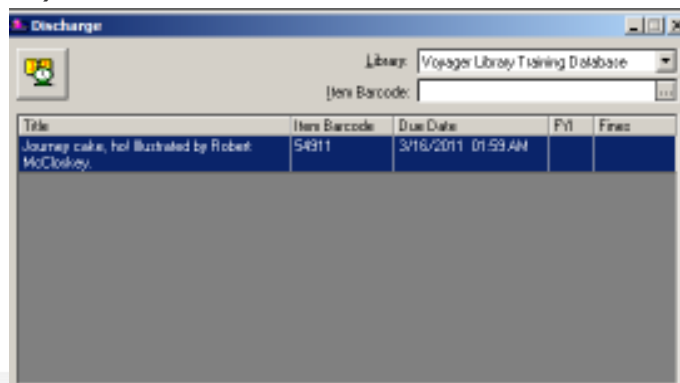
Faculty allowed to charge/renew books, borrow for 365 days, and renew up to 3 times.

If circulation calendar ends before end of loan period, would shorten loan period.



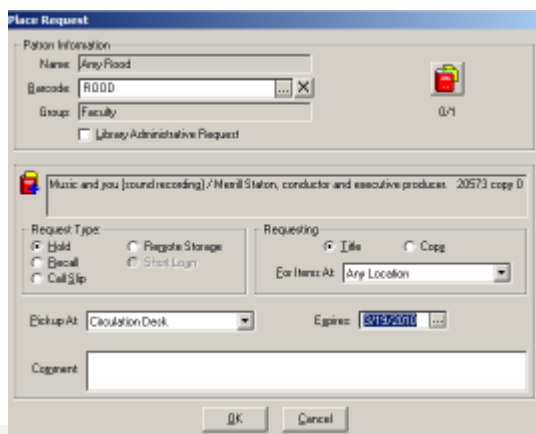
## Circulating materials: Discharge

- When patron returns book, circulation desk scans item to “Discharge” it from the patron’s account.
- Would display fines (Fines) or routing info (FYI) if overdue or needed at another library



## Holds and recalls

- Patrons can come into the library and select an item from the shelf to charge, or they can use WebVoyage to place a hold or recall on items currently charged to other patrons.



Staff can also place holds at circ desk on behalf of patrons.

## **Holds and recalls**

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- Hold: puts patron on waiting list for item – patron will wait his turn to check it out after each patron on hold list ahead of him has opportunity to borrow item.
- Recall: shortens lending period of item for current patron – sometimes significantly – so that patron placing recall request can get item quickly.
- Also, Call Slip (separate client) – see “Setting Up Call Slip – Configuration and Workflow” in LMS – for requesting items that are not currently on loan to patrons but on shelf.



## **Course reserves**

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- Creates list of materials to be held in reserve (kept at a reserve desk or circulation desk) for students in a class
- Students can come to library and borrow items from the reserve desk for in-library use for prescribed length of time
- Lists linked to courses/professors for searching, and active for specified length of time
- Can re-activate after list expires, and can search in WebVoyage



## Course reserves

Create reserve lists in Circulation ...

...and students can search for list in WebVoyage

Permanent location

Location: Juvenile Education Stacks

Temporarily shelved at Circulation Desk

Temporary reserve location



## How Circulation plays with the rest of Voyager's modules

- Cataloging – stores item barcodes, bibs, item types
- Acquisitions – ordering for items that circulate in the library
- WebVoyage – patron interface for circulation; patron holds/recalls, fines/fees; charged items and due dates
- SysAdmin: Circulation Calendar, Patron Groups, Policy Definitions, Locations, Call Slips, circulation policies, patron-item matrix – most settings determining circulation rules set here



## More information

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- [Learning Center](http://learn.exlibrisgroup.com/) (<http://learn.exlibrisgroup.com/>)
  - Voyager 7 Circulation
  - Voyager Pick and Scan
  - Voyager Setting Up Call Slip: Configuration and Workflow
  - Voyager 7 Circulation Under the Hood
- [Documentation Center](http://docs.exlibrisgroup.com/docportal) (<http://docs.exlibrisgroup.com/docportal>)
  - Circulation guide
    - Voyager --> User Guides --> Core Voyager Documentation
- [eService](http://support.exlibrisgroup.com/) (<http://support.exlibrisgroup.com/>)
  - Search the KnowledgeBase for How-Tos!



Thank You!