



# Voyager® 6.1

## System Administration User's

## Guide

June 2006

**Endeavor Information Systems, Inc.**

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### **D            ISBN-13 Support**

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## About This Document

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### Purpose

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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.

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No matter what your previous experience has been, your implementation will 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 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 from your Endeavor support staff is only a telephone call or e-mail message away.

## Intended Audience

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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

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This user's guide incorporates and is being reissued for the following reasons.

- New feature added to the **Systems - Miscellaneous** dialog box called Display Headings Subdivision Separators. See [Miscellaneous](#) on [page 10-70](#) for more information.
- ISBN-13 support information added. See [ISBN-13 Support](#) on [page D-1](#).
- UB check box added to the **Matrix** tab settings of the **Circulation - Policy Definitions** workspace. See [Matrix Tab](#) on [page 5-78](#) for more information.
- Holdings Keyword Search information added to Appendix A. See [Holdings Keyword Indexes](#) on [page A-15](#) for more information.
- Documentation enhancements made to duplicate detection processing tables. See Chapter 4 [Cataloging Configuration](#).
- Changes requested through Customer First feedback.

## How to Use This Document

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This document consists of the following:

- |           |  |
|-----------|--|
| Chapter 1 | <a href="#"><b>"Getting Started"</b></a><br>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 | <a href="#"><b>"Acquisitions Configuration"</b></a><br>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 | <a href="#"><b>"Call Slip Configuration"</b></a><br>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 | <a href="#"><b>"Cataloging Configuration"</b></a><br>Chapter 4 provides information regarding options available for importing records (authority, bibliographic, holdings, and item) for the Cataloguing module of Voyager System Administration.  |
| Chapter 5 | <a href="#"><b>"Circulation Configuration"</b></a><br>Chapter 5 provides information regarding options needed for circulation purposes such as circulation policies, patron setup, and calendars.  |
| Chapter 6 | <a href="#"><b>"Defining Circulation Blocks"</b></a><br>Chapter 6 defines the different types of circulation blocks and describes how to handle them when they occur.  |
| Chapter 7 | <a href="#"><b>"OPAC Configuration"</b></a><br>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 | <a href="#"><b>"Search Configuration"</b></a><br>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 | <a href="#"><b>"Security"</b></a><br>Chapter 9 provides information regarding security options available for operator profiles, master security profiles, cataloguing profiles, and so on.   |

---

Chapter <a href="#">10</a>	<a href="#">“System”</a>
	Chapter <a href="#">10</a> provides information regarding system-wide options available such as printing locations, fines/fees definitions, currency specifications, item types, statistical categories, and so on.
Appendix <a href="#">A</a>	<a href="#">“Search Definition Tables”</a>
	Appendix <a href="#">A</a> provides information regarding options available for customizing search options beyond the preset options provided.
Appendix <a href="#">B</a>	<a href="#">“Z39.50 Attribute Codes”</a>
	Appendix <a href="#">B</a> provides information regarding the attributes used in Z39.50 connections.
Appendix <a href="#">C</a>	<a href="#">“Embedded Order Data”</a>
	Appendix <a href="#">C</a> provides additional information regarding bulk import and the use of embedded order data (EOD) to enhance the acquisitions process.
Appendix <a href="#">D</a>	<a href="#">“ISBN-13 Support”</a>
	Appendix <a href="#">D</a> describes ISBN-13 support/implementation in Voyager.
Index	The <a href="#">Index</a> is an alphabetical, detailed cross-reference of topics about which this document contains information.

## 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, warning, 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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# Getting Started

# 1

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## Contents

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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 a 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 File 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	<b>F1</b>
Access menu or function	Click <b>Alt</b> or <b>F10</b> , then the underlined letter as indicated in the menu.
Close certain dialog boxes.	<b>ESC</b>
Display drop-down arrow selections Display fields represented by ellipsis buttons	<b>F4</b> ( <b>F8</b> 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**

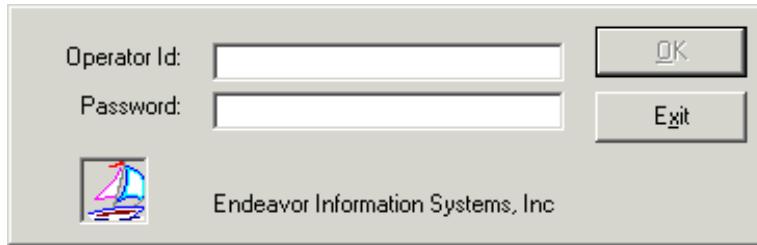
Before you can begin working in the Voyager System Administration module, you must log in with your Operator Id and Password. If you are logging in for the first time, you need to use the default Operator Id and Password provided in [Procedure 1-1, Logging In to Voyager System Administration.](#)



#### **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. Enter **SYSADMIN as the Operator ID** the first time you log in.
  - 3. Enter your Password in the **Password** field. Enter **EISI** as your Password the first time you log in.

**NOTE:**

Use uppercase for both the Operator ID and the Password.

- 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*.

---

# Acquisitions Configuration

# 2

---

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### 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

---

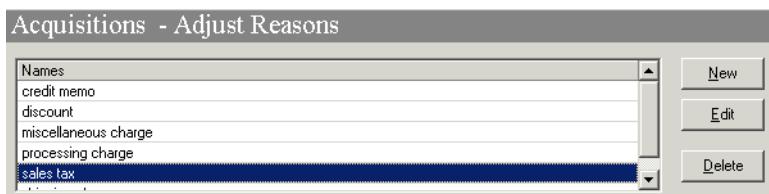
Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Adjust Reasons** workspace. See [Master Security Profiles - Creating, Editing, and Deleting on page 9-23](#).

## 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 :** [Text Input]

**EDI Code:** [Text Input]

**Vendor:** [Dropdown Menu]

Charge     Credit

**Save**    **Cancel**

**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	<p>The EDI code describes the purpose of the adjustment. For each adjustment reason, there should be a corresponding EDI code.</p> <p>See the <i>EDItEUR Guidelines</i> at <a href="http://www.editeur.org">http://www.editeur.org</a> and your EDI vendor for more information.</p> <p><b>NOTE:</b> 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.</p>	No	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 250 characters.
Vendor	<p>The vendor for whom the adjustment applies.</p> <p><b>NOTE:</b> This means that the reason can only be used for this vendor.</p>	No	Drop-down menu created from the vendors defined in the Acquisitions/Serials module.
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.
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.

### **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.

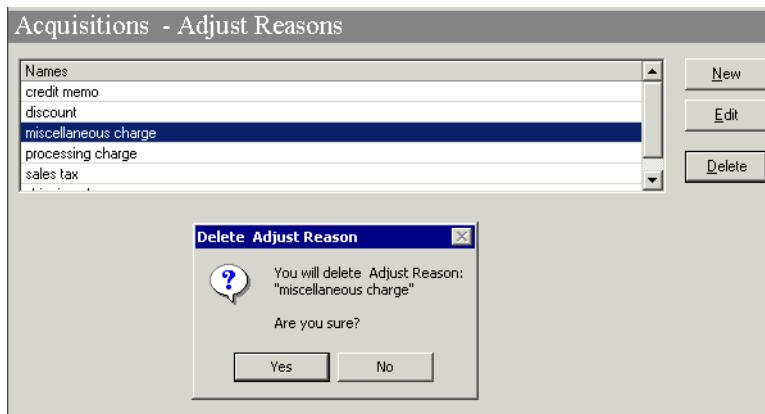
1. Access the System Administration module's **Acquisitions - Adjust Reason** workspace.
  - a. Click **Acquisitions** in the listbar.

- 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 2-4](#)).



**Figure 2-4. 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 2-5](#)), 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

---

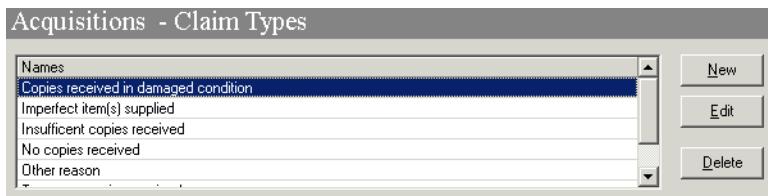
Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Claim Types** workspace. See [Master Security Profiles - Creating, Editing, and Deleting on page 9-23](#).

## 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 2-5](#)). It shows the names of any Claim Types already defined.



---

**Figure 2-5. Acquisitions - Claim Types Workspace**

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Claim Types** workspace opens (see [Figure 2-6](#)). In this example, the fields are filled because the **Edit** button was selected.

The screenshot shows a modal dialog box titled "Edit Claim Type". Inside the dialog, there is a "Claim Description" input field containing the text "Copies received in damaged condition". Below it is an "EDI Code" input field containing "208". At the bottom of the dialog are two buttons: "Save" on the left and "Cancel" on the right.

**Figure 2-6. 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: <ul style="list-style-type: none"><li>• Copies received in damaged condition</li><li>• Insufficient copies received</li><li>• Wrong item(s) supplied</li></ul>	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 <a href="http://www.editeur.org">http://www.editeur.org</a> 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.

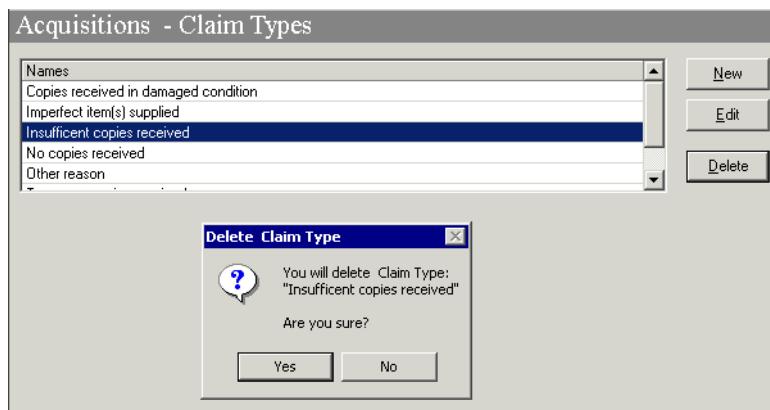
1. Access the System Administration module's **Acquisitions - Claim Types** workspace.
  - a. Click **Acquisitions** in the listbar.
  - b. Click the **Claim Types** button in the System listbar.

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 2-7](#)).

---



---

**Figure 2-7. 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

---

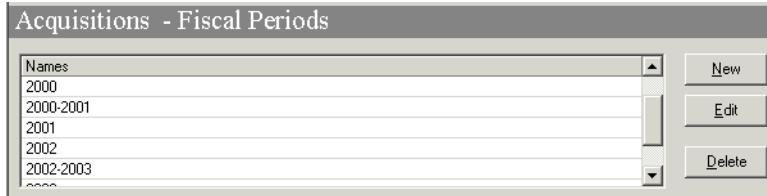
Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Fiscal Periods** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-23](#).

## 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 2-8](#)). It shows the names of any Fiscal Periods already defined.



**Figure 2-8.** Acquisitions - Fiscal Periods Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Fiscal Periods** workspace opens (see [Figure 2-9](#)). In this example, the fields are blank because the **New** button was selected.

The screenshot shows a dialog box titled "New Fiscal Period". It contains a "Fiscal Period Name:" input field, a "Start Date:" dropdown set to "9/17/2002", and an "End Date:" dropdown also set to "9/17/2002". At the bottom are "Save" and "Cancel" buttons.

**Figure 2-9.** 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	<p>Name of the Fiscal period. At least one Fiscal Period must be defined.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• July-June FY 02</li> <li>• Calendar FY 2003</li> </ul>	Yes	<p>Alphanumeric, punctuation, and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>25 characters.</p>

---

**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.

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.

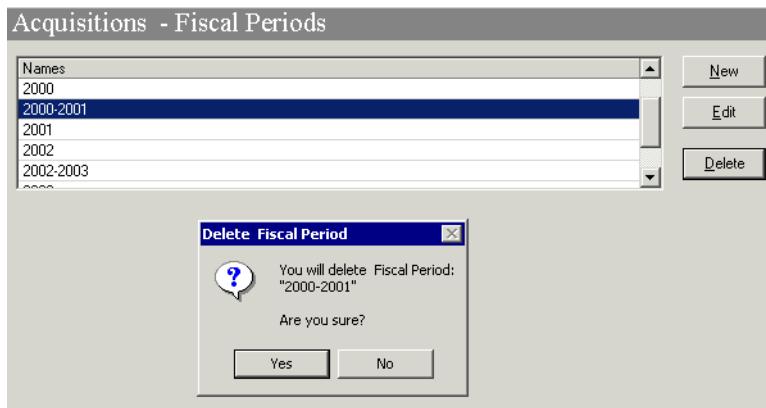
- b. Click the **Fiscal Periods** button in the System listbar.

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 2-10](#)).

---



---

**Figure 2-10. 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 9-23](#).

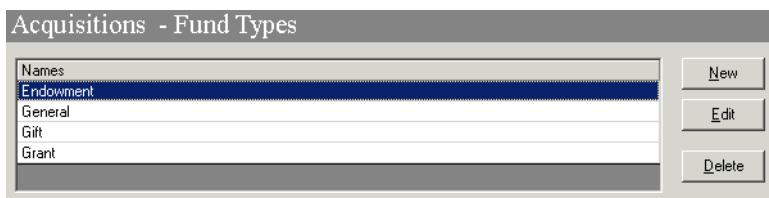
## Fund Types Workspace

---

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 2-11](#)). It shows the names of any Fund Types already defined.

---



---

**Figure 2-11. Acquisitions - Fund Types Workspace**

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Fund Types** workspace opens (see [Figure 2-12](#)). In this example, the fields are blank because the **New** button was selected.

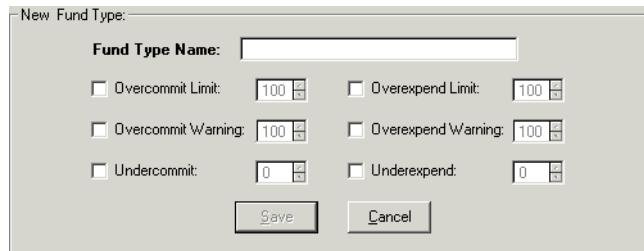


Figure 2-12. New Fund Type section

### 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: <ul style="list-style-type: none"><li>• Regular</li><li>• Non-Recurring</li><li>• Deposit</li></ul>	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 Under-commit 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.

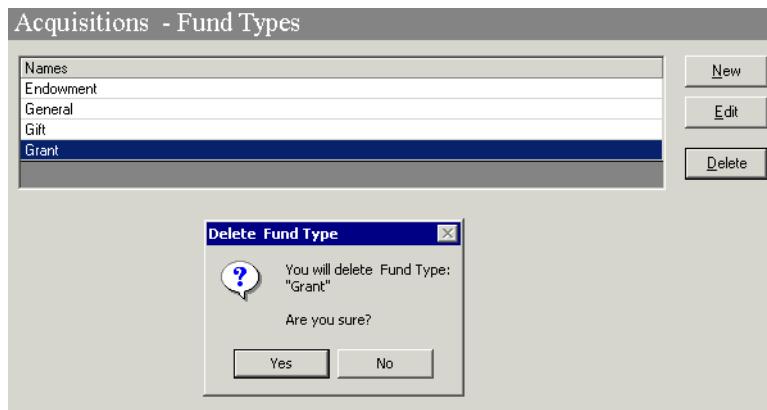
1. Access the System Administration module's **Acquisitions - Fund Types** workspace.

- 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 2-13](#)).



**Figure 2-13. 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

---

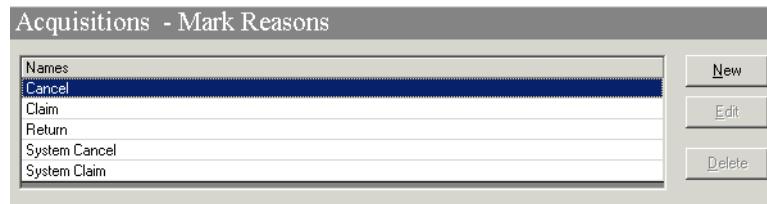
Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Mark Reasons** workspace. See [Master Security Profiles - Creating, Editing, and Deleting on page 9-23](#).

## 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 2-14](#)). It shows the system supplied Mark Reasons.

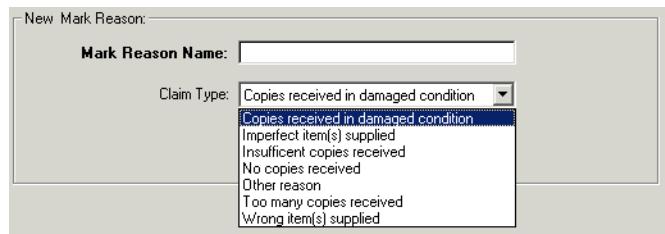


**Figure 2-14.** Acquisitions - Mark Reasons Workspace

**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 2-15](#)). In this example the drop-down menu of Claim Types is also displayed.



**Figure 2-15.** 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	<p>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.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• Damaged</li> <li>• Overdue</li> <li>• Wrong Edition</li> <li>• High Cost</li> </ul>	Yes	<p>Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.</p>
Claim Type	The reason for making a claim, that is, the problem with the item.	Yes	<p>Drop-down menu of Claim Types created in the Acquisitions - Claim Types workspace. See <a href="#">Claim Types Workspace</a> on page 2-9</p>

## 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 2-16](#)).



**Figure 2-16. 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 2-17](#)). See [Policy Definitions](#) on page [2-41](#) for more information.

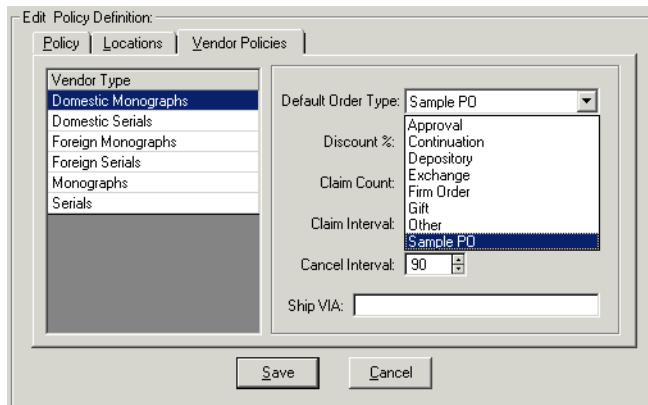


Figure 2-17. PO Types in the Policy Definitions

- The **Search For** field that displays when searching for a purchase order by PO Type in the Acquisitions module (see [Figure 2-18](#)). See the *Voyager Acquisitions User's Guide* for more information.

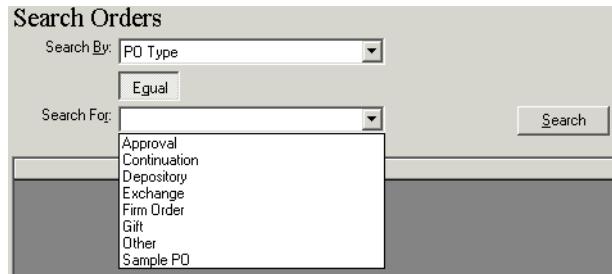
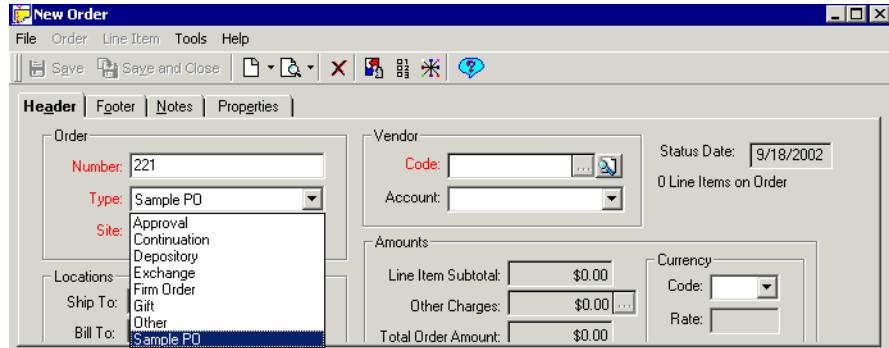


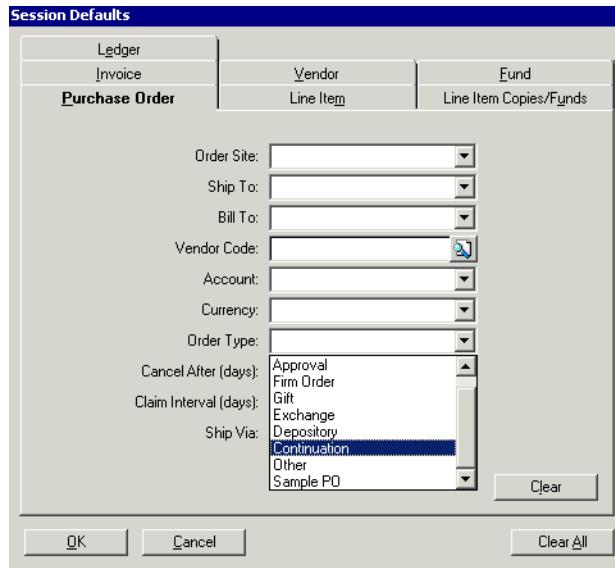
Figure 2-18. PO Types in the Search For field

- The **PO Type** field on all purchase orders in the Acquisitions module (see [Figure 2-19](#)). See the *Voyager Acquisitions User's Guide* for more information.



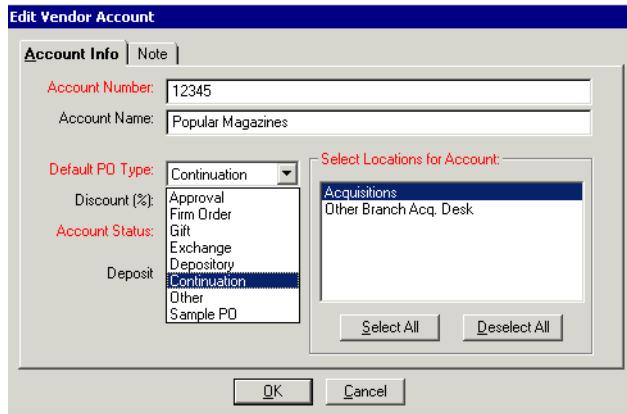
**Figure 2-19. PO Types in the PO**

- The **Order Type** field on the **Purchase Order** tab of the **Session Defaults** dialog box in the Acquisitions module (see [Figure 2-20](#)). See the *Voyager Acquisitions User's Guide* for more information.
- 



**Figure 2-20. 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 2-21](#)). See the *Voyager Acquisitions User's Guide* for more information.



**Figure 2-21. 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 9-23](#).

## 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 2-22](#)). It shows the names of any PO Types that are already defined.

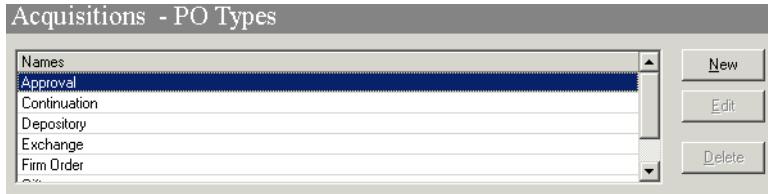


Figure 2-22. Acquisitions - PO Types Workspace

**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 2-23](#)).

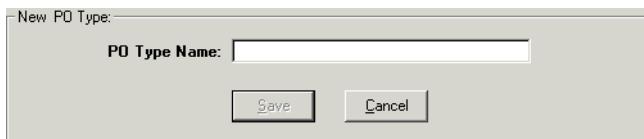


Figure 2-23. PO Types section

**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 2-24](#) shows the PO Type name of Sample PO entered in the **PO Type Name** field.

The screenshot shows a modal dialog box titled "New PO Type". Inside the dialog, there is a single input field labeled "PO Type Name:" containing the text "Sample PO". Below the input field are two buttons: "Save" and "Cancel". The "Save" button is positioned to the left of the "Cancel" button.

---

**Figure 2-24. 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 2-33.

---

## 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

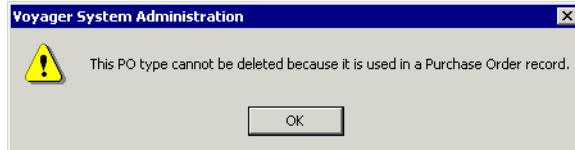
---

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 2-25](#)).



**Figure 2-25. 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**

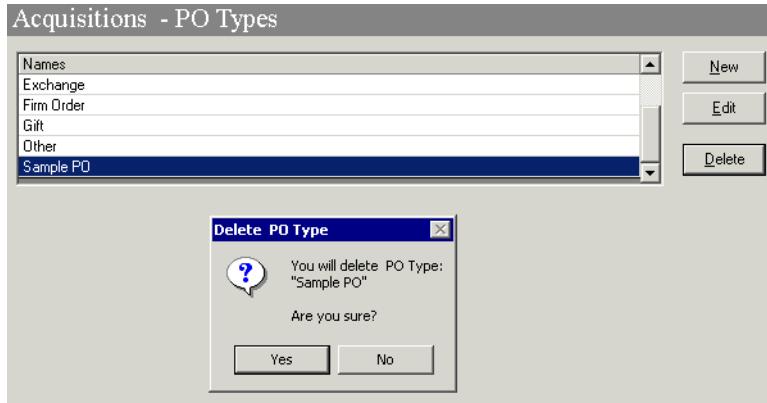
Use the following to delete a PO Type.

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 2-26](#)).

**Figure 2-26. Delete PO Type confirmation**

- 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 2-33](#).

## 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

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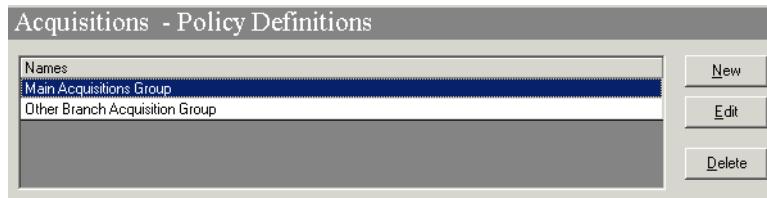
Operators linked to a Master security profile, where the **Acq/Serials Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Acquisitions - Policy Definitions** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-23](#).

### 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 2-27](#)). It shows the names of any Acquisitions/Serials Policy Groups already defined.



**Figure 2-27. Acquisitions - Policy Definitions Workspace**

After clicking either the **New** or **Edit** buttons, the tabs of the **Acquisitions - Policy** workspace display. [Figure 2-28](#) on [page 2-43](#), [Figure 2-29](#) on [page 2-45](#), and [Figure 2-30](#) on [page 2-50](#) 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 2-28](#) displays the **Policy** tab. See [Bibliographic Duplicate Detection](#) on [page 4-20](#) for more information.

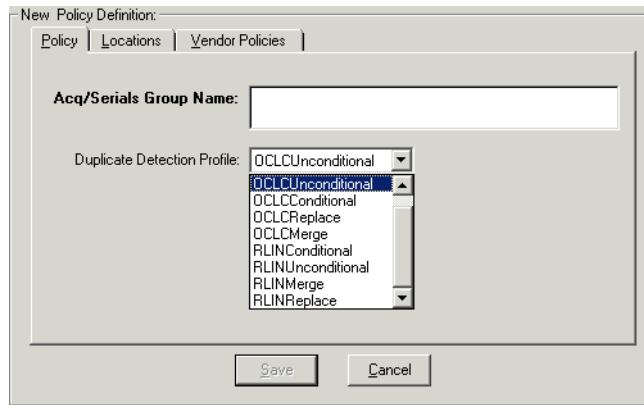


Figure 2-28. New Policy Definitions section, Policy tab

### 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	<p>Name of the Acquisitions or Serials policy group.</p> <p> <b>TIP:</b> <i>Create a name that describes the acquisition unit especially if you have more than one Policy Group.</i></p> <p>For example:</p> <ul style="list-style-type: none"> <li>• Main Acquisitions</li> <li>• Music Receiving.</li> </ul>	Yes	<p>Alphanumeric, punctuation, and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>40 characters.</p>

**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 <a href="#">Bibliographic Duplicate Detection</a> on page 4-20 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 2-29](#) 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.

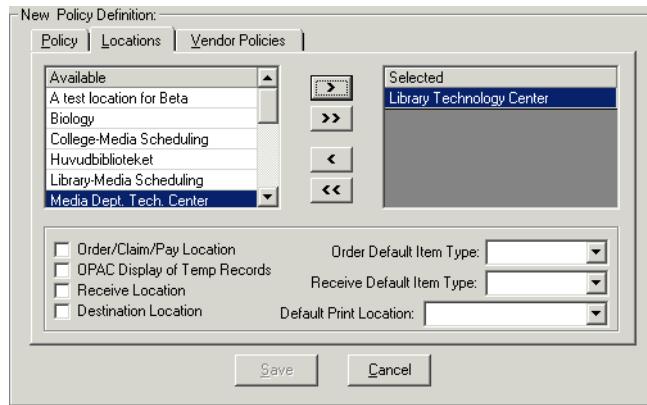


Figure 2-29. New Policy Definitions section, Locations tab

### 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 <a href="#">Locations</a> on page 10-38.
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	<p>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.</p> <p>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.</p>	<p>Yes, there must be at least one defined for each Group.</p> <p>You may have more than one for this Policy Group.</p>	<p>Check box</p> <p>The default is unchecked.</p>
OPAC Display of Temp Records	<p>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.</p> <p>The order location on the Purchase Order controls the 'suppress from OPAC' flag on the bibliographic record.</p> <p>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.</p>	No	<p>Check box</p> <p>The default is unchecked.</p>

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

Name	Description	Required	Type and Range
Receive Location	<p>When checked, it allows items to be received at the selected happening location. It is a place where receiving is actually performed.</p> <p>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.</p>	<p>Yes, there must be at least one defined for each Group.</p> <p>You may have more than one for this Policy Group.</p>	Check box The default is unchecked.
Destination Location	<p>When checked it allows items to be delivered to the selected location the Holdings Location, where items are stored.</p> <p>All locations (except a happening location) are Destination Locations by default.</p> <p>The Destination Locations determine the list of intended locations for a line item in a purchase order.</p>	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

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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**

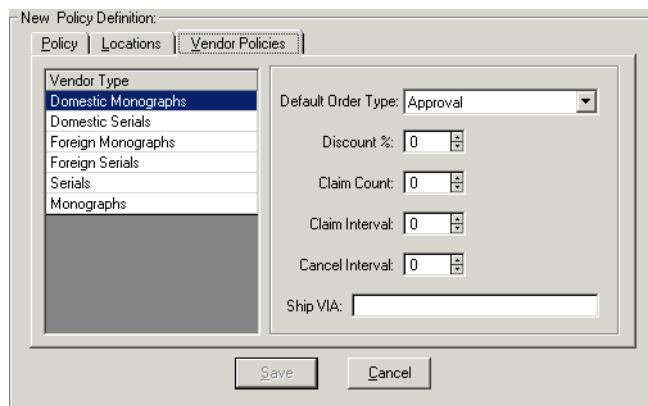
Type of Location	OPAC Display of Temp. Records	Type of Record/Suppressed or not
Order Location Intended Location	Not Checked Checked	Bib/Suppressed MFHD/Not Suppressed
Order Location Intended Location	Not Checked Not Checked	Bib/Suppressed MFHD/Suppressed
Order Location Intended Location	Checked Checked	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 2-30](#) shows the **Vendor Policies** tab.



**Figure 2-30.** 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 <a href="#">Vendor Types</a> on page 2-63.
Default Order Type	Default purchase order type; for example, approval.	No	The Order Types are established in System Administration. See <a href="#">PO Types</a> on page 2-33.
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.

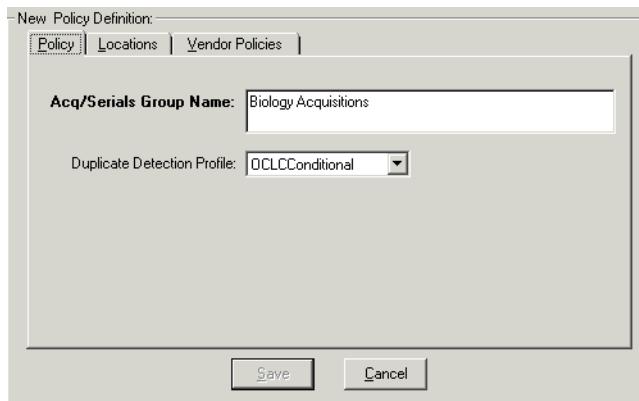
1. Access the System Administration module's **Acquisitions - Policy Definitions** workspace.

- 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 2-31](#)).



**Figure 2-31. 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.

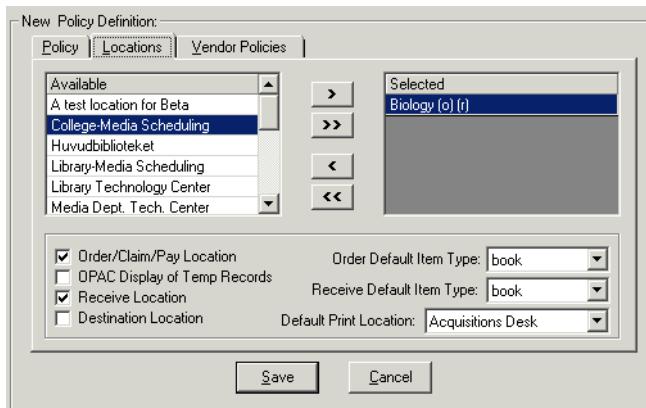
**NOTE:**

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.

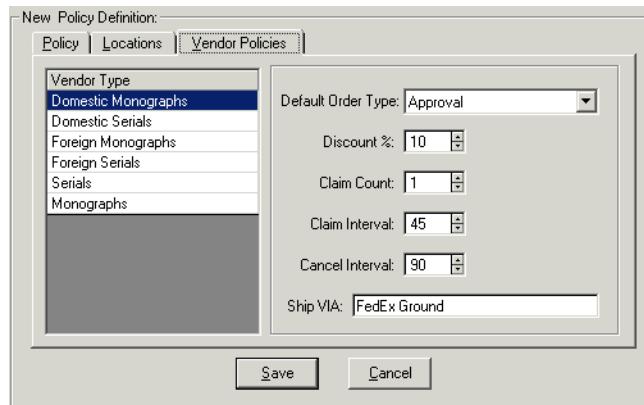
Result: The activities and defaults for a specific location are defined (see [Figure 2-32](#)).



**Figure 2-32.** 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.

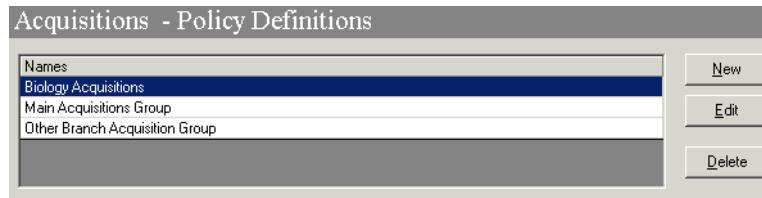
Result: The **Vendor Policies** tab is completed (see [Figure 2-33](#)).



**Figure 2-33. 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 2-34](#)).



**Figure 2-34. 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.

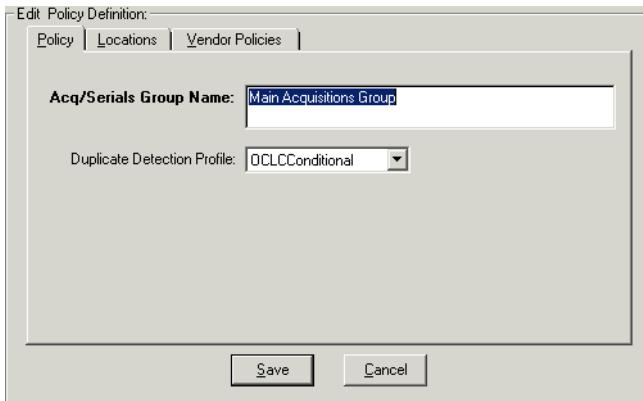
b. Click the **Policy Definitions** button in the System listbar.

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 2-35](#)).



**Figure 2-35. 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**

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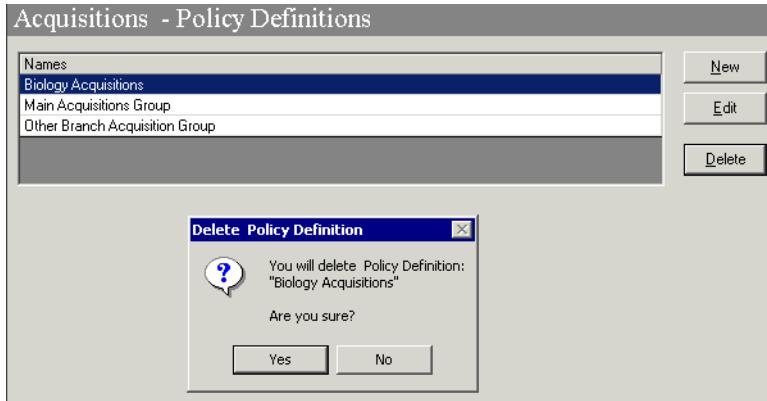
Use the following to delete a Policy Definition.

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 2-36](#)).



**Figure 2-36. 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 9-23](#).

---

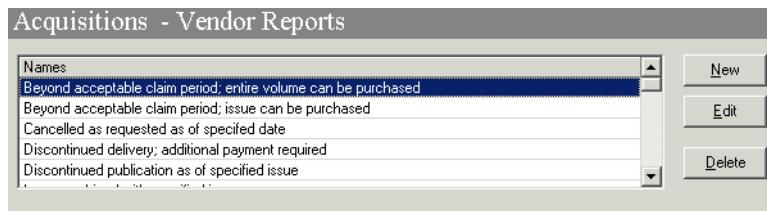
## Acquisitions - Vendor Reports Workspace

---

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 2-37](#)). It shows the names of any Vendor Reports already defined.

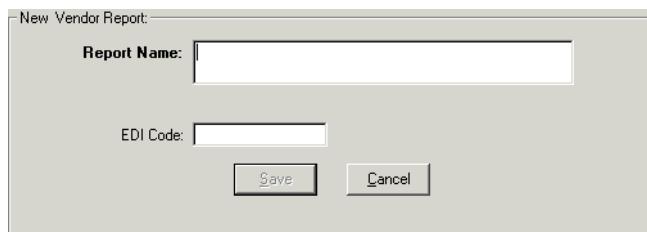
---



**Figure 2-37. Acquisitions - Vendor Reports Workspace**

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Vendor Reports** workspace opens (see [Figure 2-38](#)). In this example, the fields are blank because the **New** button was selected.

---



**Figure 2-38. 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	<p>Name of any reason or situation that a vendor might specify for an item when responding to a claim.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• Not Available</li> <li>• Out of Print</li> <li>• Out of Stock</li> </ul>	Yes	<p>Alphanumeric, punctuation, and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>70 characters.</p>
EDI Code	<p>The EDI code describes the vendor's report.</p> <p>For each vendor report there should be a corresponding EDI code.</p> <p>See the <i>EDItEUR Guidelines</i> at <a href="http://www.editeur.org">http://www.editeur.org</a> and your EDI vendor for more information.</p>	No	<p>Alphanumeric, punctuation, and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>250 characters.</p>

## 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 2-39](#)).

The screenshot shows a 'New Vendor Report' dialog box. At the top, it says 'New Vendor Report'. Below that is a 'Report Name:' label with a text input field containing 'No such issue'. Underneath is an 'EDI Code:' label with a text input field containing '08:29:28'. At the bottom are two buttons: 'Save' on the left and 'Cancel' on the right.

**Figure 2-39. 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.

---

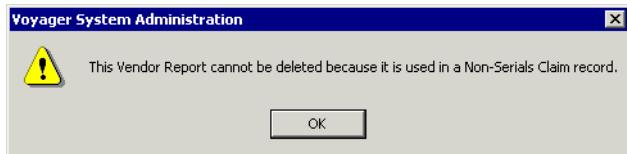
### **Deleting a Vendor Report**

---

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 2-40](#).

---



---

**Figure 2-40. 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.

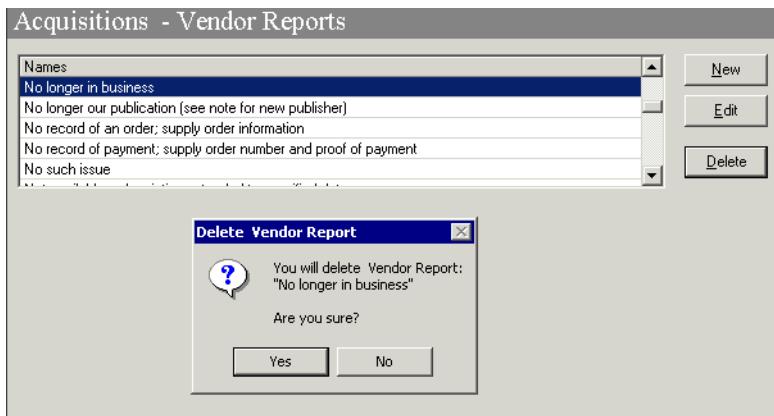
1. Access the System Administration module's **Acquisitions - Vendor Reports** workspace.

- 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 2-41](#)).



**Figure 2-41. 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 2-49](#).

## **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 9-23](#).

## **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 2-42](#)). It shows the names of any Vendor Types already defined.

Acquisitions - Vendor Types	
Codes	Names
DM	Domestic Monographs
DS	Domestic Serials
FM	Foreign Monographs
FS	Foreign Serials
M	Monographs

New  
Edit  
Delete

**Figure 2-42.** Acquisitions - Vendor Types Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **Acquisitions - Vendor Types** workspace opens (see [Figure 2-43](#)). In this example, the fields are blank because the **New** button was selected.

New Vendor Type:

Vendor Type Code:	<input type="text"/>
Vendor Type Name:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

**Figure 2-43.** 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	<p>Code associated with the Vendor Type</p> <p>Vendor Type Codes are displayed in vendor records seen by staff.</p> <p> <b>TIP:</b> <i>Mnemonic codes are generally considered more user-friendly and easier to recognize than more arbitrary or numeric codes.</i></p>	Yes	<p>Alphanumeric, punctuation, and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>2 characters.</p>
Vendor Type Name	<p>Review what default values are defined for a Vendor Type to help you decide how many types you should define.</p> <p>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.</p>	<p>Yes</p> <p>You must define at least one Vendor Type.</p>	<p>Alphanumeric, punctuation, and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>40 characters.</p>

## 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 2-44](#)).

The screenshot shows a modal dialog box titled "New Vendor Type". It has two input fields: "Vendor Type Code" containing "E" and "Vendor Type Name" containing "Electronic Journals". At the bottom are two buttons: "Save" and "Cancel".

**Figure 2-44.** 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.

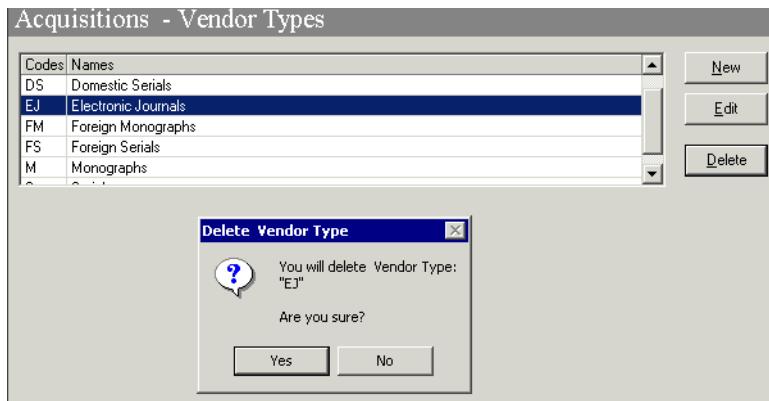
1. Access the System Administration module's **Acquisitions - Vendor Types** workspace.

- 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 2-45](#)).



**Figure 2-45. 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.

---

# Call Slip Configuration

# 3

---

## Contents

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## **Contents**

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### 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 high-level 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 Daemon module. See the *Voyager Call Slip Daemon 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 WebVoyage 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

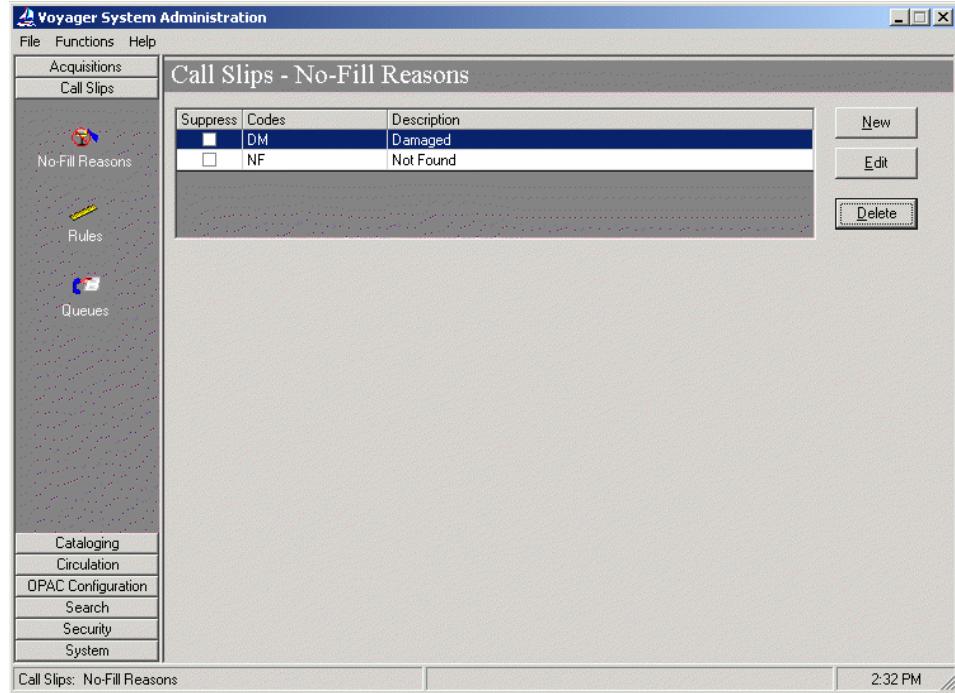
---

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](#).

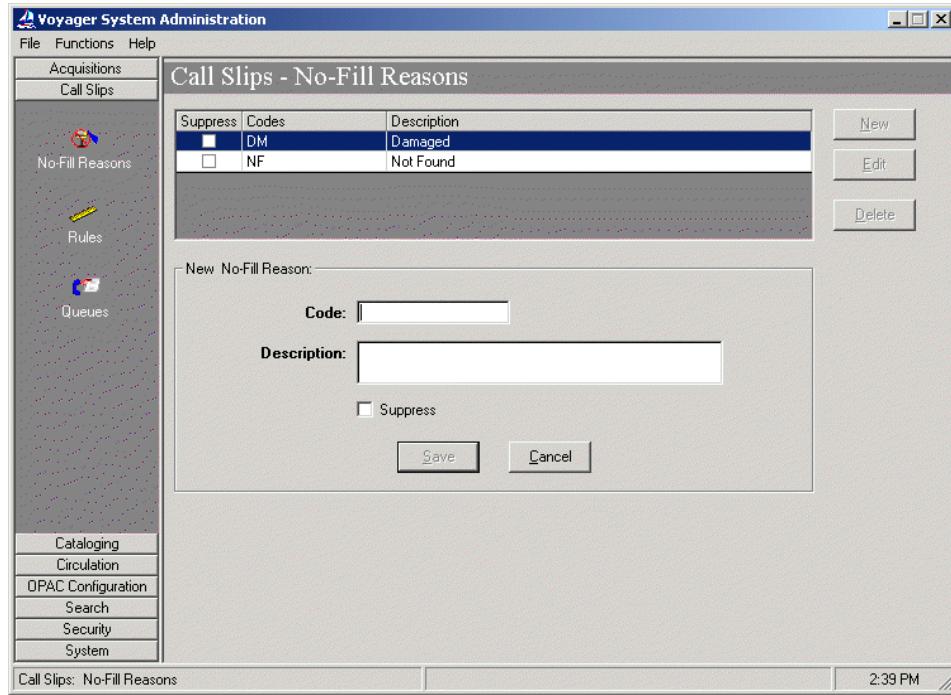


---

**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 <b>Description</b> displays in WebVoyage 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.  <b>NOTE:</b> No-Fill Reasons may not be deleted if they are in use. Use the <b>Suppress</b> option to keep the No-Fill Reason from displaying in the list of No-Fill Reasons from which the call slip operator selects.

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

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

---

## Rules

---

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

- 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.

## Creating Rules

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



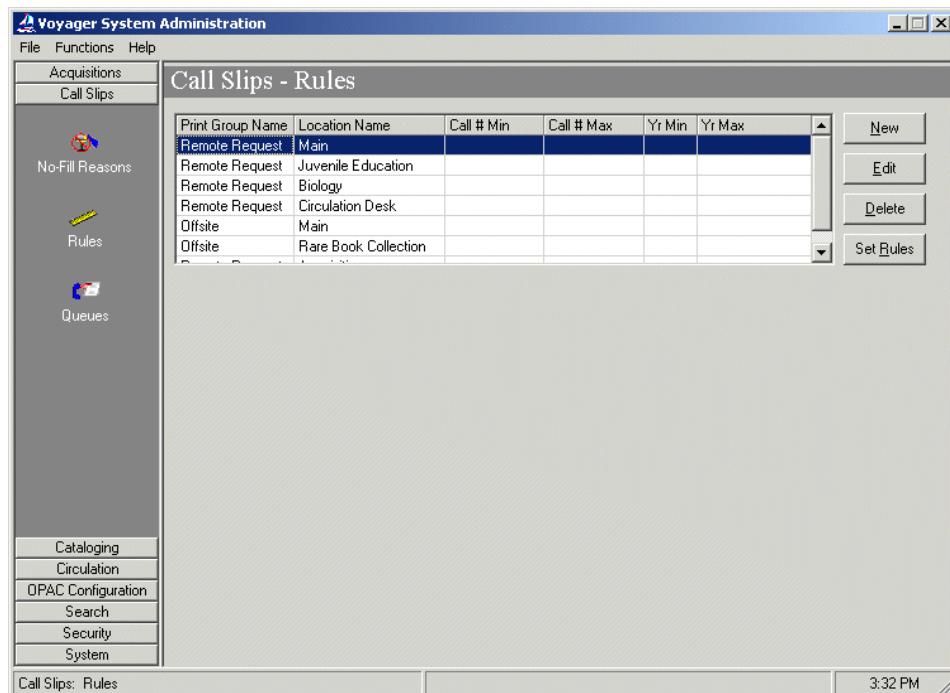
### Procedure 3-2. Creating Rules

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

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

2. Click **Rules**.

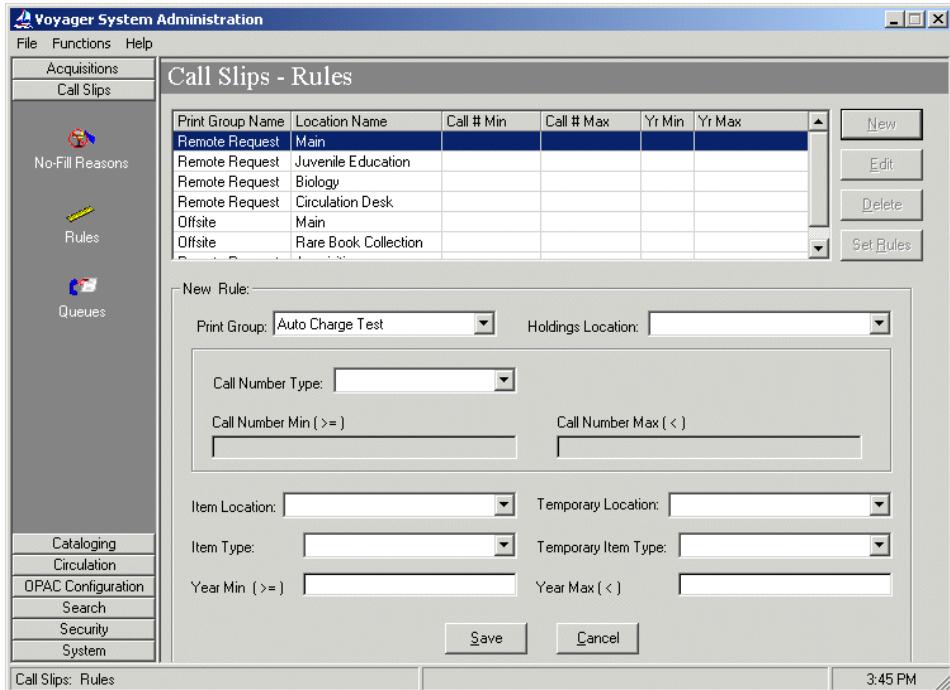
Result: The **Call Slips - Rules** main dialog box opens. See [Figure 3-3](#).



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

3. Click **New**.

Result: The **New Call Slips - Rules** options open. See [Figure 3-4](#).



**Figure 3-4. 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 <b>Print Group</b> to which the call slip message is to be routed.  <b>NOTE:</b> <b>Print Groups</b> are defined in <b>Call Slips - Queues</b> . For more information, see <a href="#">Queues</a> on <a href="#">page 3-12</a> .
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	<p>(Optional) Use <b>Call Number Type</b> in combination with <b>Call Number Min (&gt;=)</b> and <b>Call Number Max (&lt;)</b> to identify a range of call numbers or call numbers above or below a certain value in holdings records for the rule being defined.</p> <p><b>Example:</b></p> <p>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:</p> <ul style="list-style-type: none"> <li>• one with a minimum of A and a maximum of LB101.A323</li> <li>• a second with a minimum of LB101.A323 and no maximum entered</li> </ul> <p><b>NOTE:</b> 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 <b>Call Number Min (&gt;=)</b> field and less than (but not equal to) the number in the <b>Call Number Max (&lt;)</b> field.</p> <p>Select, for this field, the call number type to match your requirements.</p>
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 <b>Call Number Type</b> .
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 <b>Call Number Type</b> .
Item Location	(Optional) Select the location where the item must be stored for the rule to apply.

**Table 3-2. Call Slips - Rules options**

<b>Option</b>	<b>Description</b>
Temporary Location	(Optional) Select the location where the item must be temporarily stored for the rule to apply.  <b>NOTE:</b> If both the <b>Item Location</b> and the <b>Temporary Location</b> 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.  <b>NOTE:</b> If both the <b>Item Type</b> and the <b>Temporary Item Type</b> 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.  <b>NOTE:</b> 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 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.

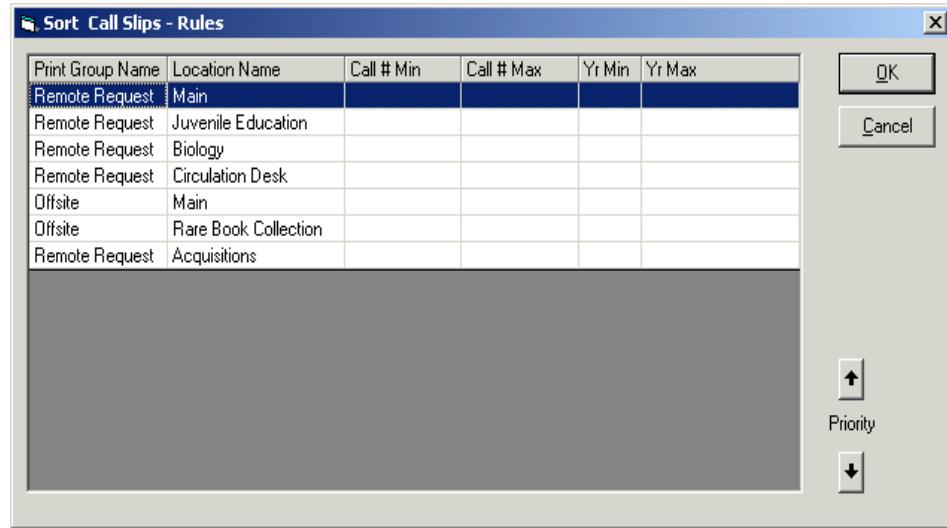
2. Click **Rules**.

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 3-5](#).

---



**Figure 3-5. 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 Daemon 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

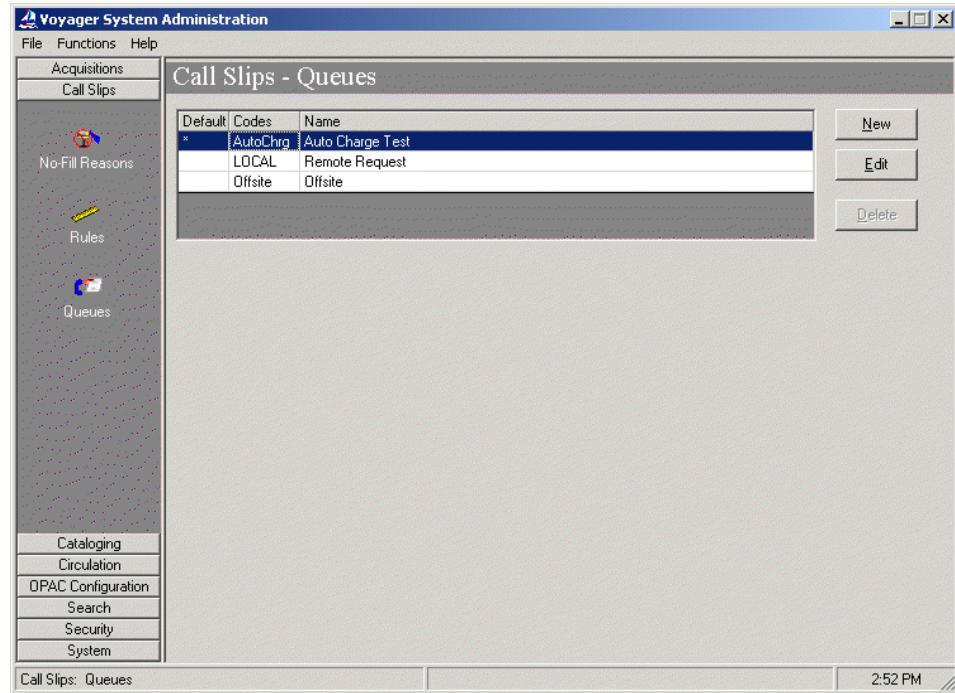
---

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 3-6](#).

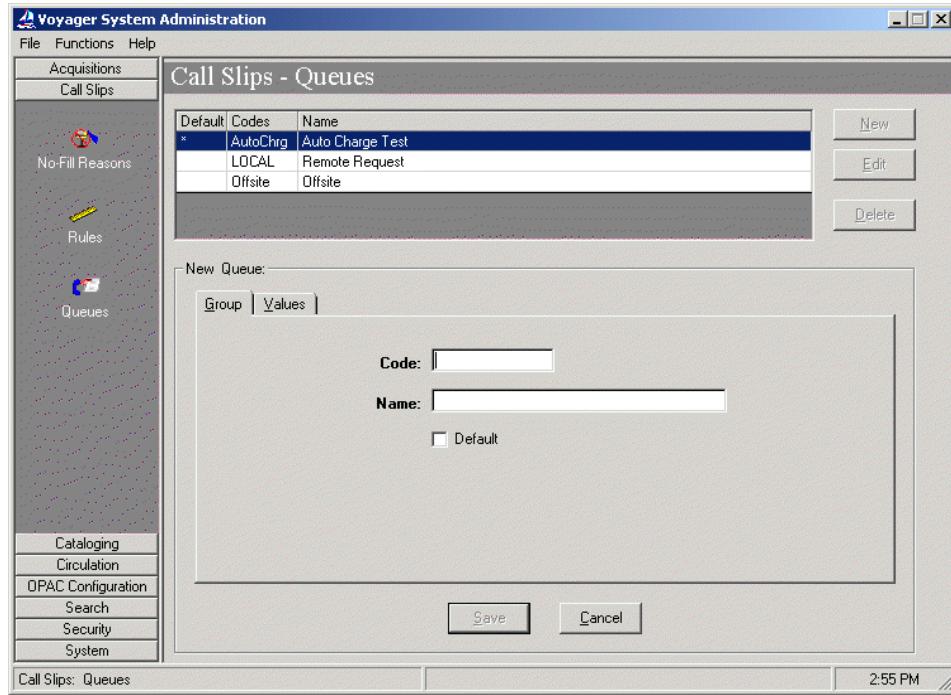


---

**Figure 3-6. Call Slips - Queues main dialog box**

3. Click **New**.

Result: The **Call Slips - Queues Group** tab options open. See [Figure 3-7](#).



**Figure 3-7. 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**

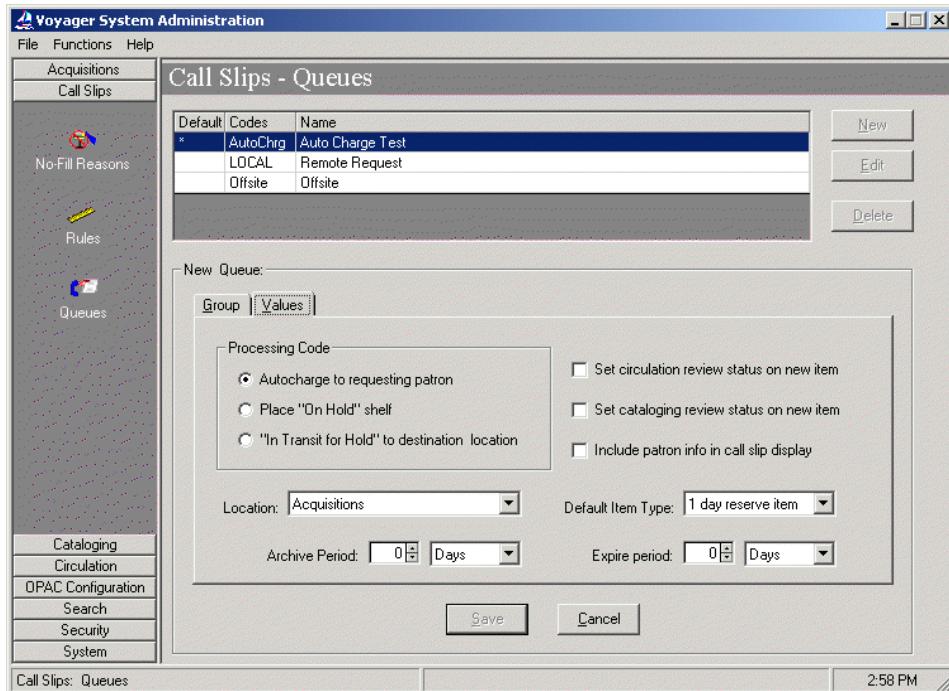
Option	Description
Code	Enter the <b>Code</b> for the call slip queue, up to 10 alphanumeric characters in length.
Name	Enter the <b>Name</b> for the call slip queue, up to 25 alphanumeric characters in length.

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

Option	Description
Default	<p>Check the <b>Default</b> box to make this call slip queue the default.</p> <p><b>NOTE:</b> 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 <b>Default</b>.</p>

5. Click the **Values** tab.

Result: This displays the **Values** tab options. See [Figure 3-8](#).

**Figure 3-8. Call Slips - Queues Values tab**

6. 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 <b>Process</b> button is clicked in the Call Slip Daemon 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.  <b>NOTE:</b> This option must be selected to enable the <b>Pick Up At</b> 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 <b>Pick Up At</b> field to work.
Set circulation review status on new item	Select this option to require that any new items created in the Call Slip Daemon 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 Daemon 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 <b>Location</b> to where the item is to be delivered after it is retrieved from the stacks.
Default Item Type	Select the <b>Default Item Type</b> to identify the default that is used when creating a new item in order to fulfill a call slip request.
Archive Period	<p>Enter the <b>Archive Period</b> of time by entering a number in the first field and selecting the appropriate unit of time (Days, Hours, Minutes) in the second field.</p> <p>Use the <b>Archive Period</b> to specify the length of time that a filled, not filled, or expired request is displayed in WebVoyage. After the <b>Archive Period</b> of time has passed, the call slip requests are archived by the Circulation batch job.</p> <p>If the <b>Archive Period</b> is set to zero (0), call slip requests are archived immediately.</p>
Expire period	<p>Enter the <b>Expire period</b> of time by entering a number in the first field and selecting the appropriate unit of time (Days, Hours, Minutes) in the second field.</p> <p>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.</p> <p>If this option is set to zero (0), call slip requests never expire.</p>

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

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

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## Cataloging Configuration

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## Cataloging Configuration

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### Introduction

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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

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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.

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, for example.

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 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**

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Use the following to create an Authority Duplicate Detection Profile.



#### **Procedure 4-1. Creating Authority Duplicate Detection Profile**

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

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

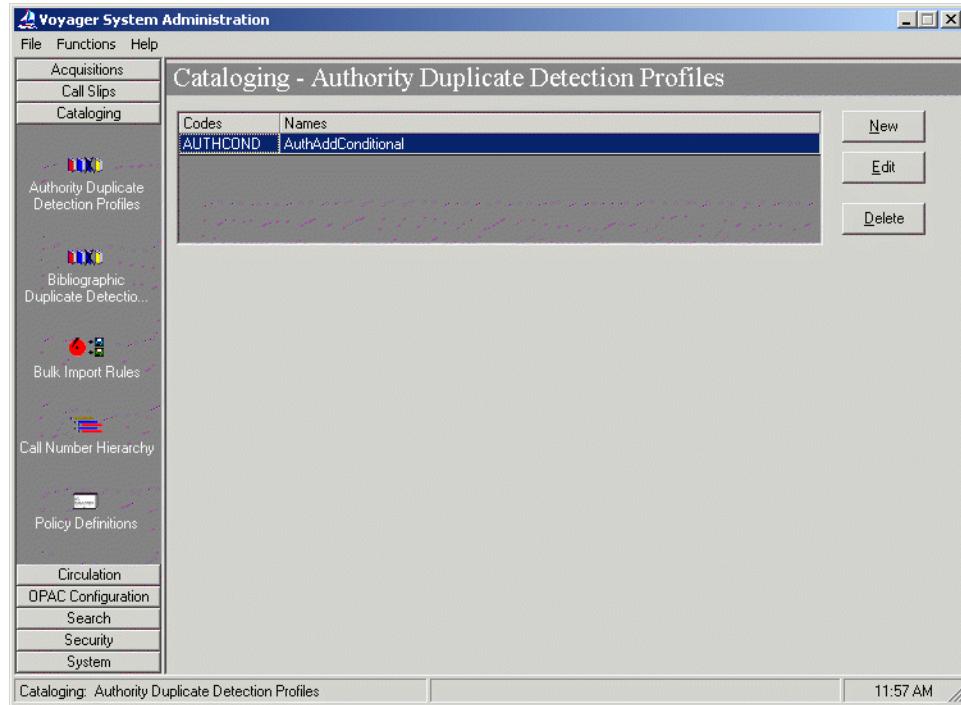


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**Figure 4-1. Cataloging listbar options**

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

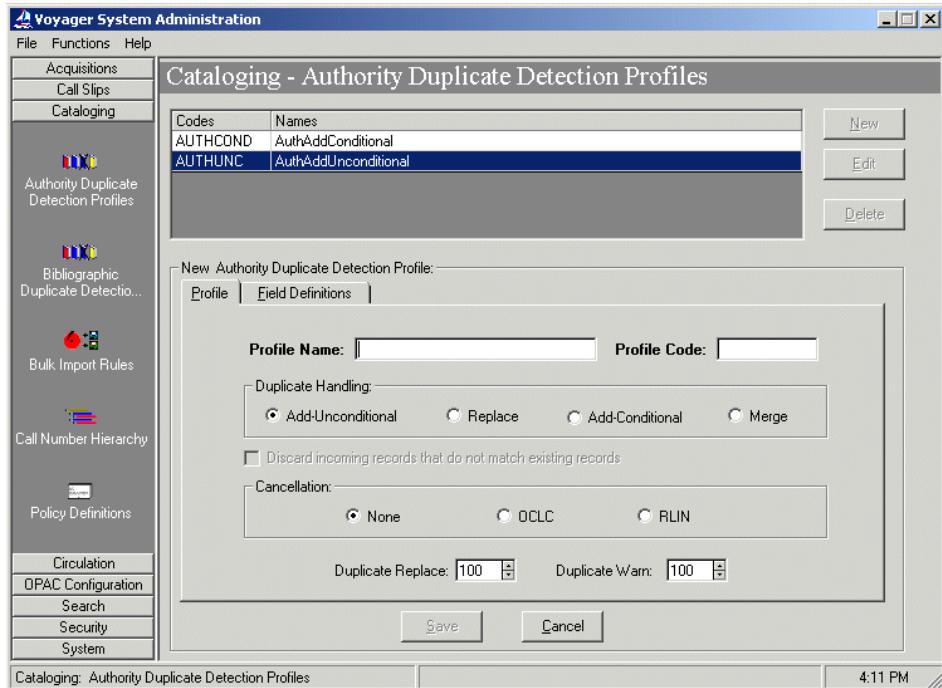
Result: The **Cataloging - Authority Duplicate Detection Profiles** dialog box opens. See [Figure 4-2](#).



**Figure 4-2. Cataloging - Authority Duplicate Detection Profiles**

3. Click **New**.

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



**Figure 4-3. New 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**

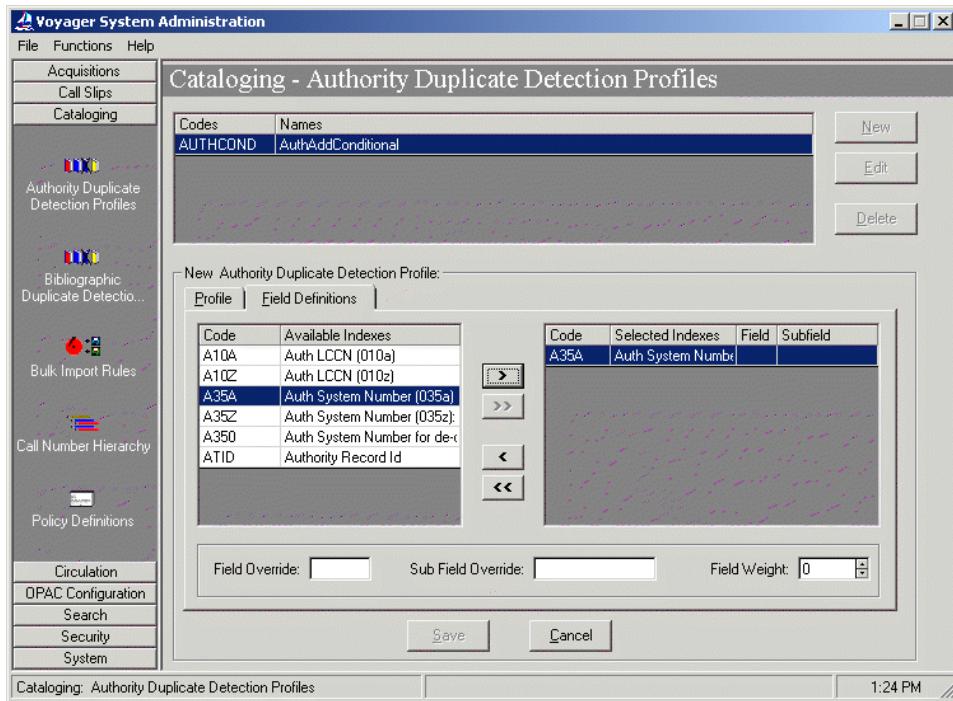
Options	Description
Duplicate Handling	<p><b>Add-Unconditional.</b> Specifies that any incoming record is added to the Voyager database even if a duplicate(s) is detected.</p> <p><b>Replace.</b> Specifies that when an incoming record matches an existing Voyager record, the incoming record replaces the Voyager record (if the quality of the incoming record meets or surpasses the values specified for <b>Duplicate Warn/Replace</b> and <b>Field Weight</b>) 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.</p> <p><b>Add-Conditional.</b> 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.</p> <p><b>Merge.</b> 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 <b>Merge Fields</b> 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.</p> <p><b>NOTE:</b> There are many components involved in the processing of records and <b>Duplicate Handling</b>. For more information about the logic in duplicate detection processing, files created and appended, deleted, discarded, replaced records, and so on, see <a href="#">Authority Record Duplicate Detection Processing</a> on page 4-13, <a href="#">Profile Options and Duplicate Detection</a> on page 4-13, <a href="#">BulkImport Versus Online Entry</a> on page 4-14, and <a href="#">Files Affected By Duplicate Detection Processing</a> on page 4-17.</p>
Discard incoming records that do not match existing records	<p>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.</p> <p>The default is to add incoming records to the database when there is no match.</p>

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

Options	Description
Cancellation	<p>Use the <b>OCLC</b> or <b>RLIN</b> options to override any of the choices selected for Duplicate Handling.</p> <p><b>None.</b> Select <b>None</b> 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.</p> <p><b>OCLC.</b> Select <b>OCLC</b> 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.</p> <p><b>RLIN.</b> Select <b>RLIN</b> 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.</p>
Duplicate Replace	<p>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.</p> <p>See <a href="#">Authority Record Duplicate Detection Processing</a> on <a href="#">page 4-13</a> for more information about the <b>Duplicate Replace</b> value.</p>
Duplicate Warn	<p>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.</p> <p>See <a href="#">Authority Record Duplicate Detection Processing</a> on <a href="#">page 4-13</a> for more information about the <b>Duplicate Warn</b> value.</p> <p><b>NOTE:</b> A valid <b>Duplicate Warn</b> value must be less than or equal to the specified <b>Duplicate Replace</b> value. A valid <b>Duplicate Warn</b> value must be specified in order to save the duplicate detection profile.</p>

5. Click the **Field Definitions** tab.

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



**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	<p>Use this option in combination with the <b>Sub Field Override</b> option to have the system use something other than the default fields in the index for duplicate detection comparisons.</p> <p>Example: To compare the 019\$a field of an incoming OCLC record with the 035\$a index in the database, specify 019 in <b>Field Override</b> and a in the <b>Sub Field Override</b> with the 035\$a index selected. If there is no 019\$a in the incoming record, no matching is done.</p>
Sub Field Override	<p>Use this option in combination with the <b>Field Override</b> option to have the system use something other than the default fields in the index for duplicate detection comparisons.</p> <p>Example: To compare the 019\$a field of an incoming OCLC record with the 035\$a index in the database, specify 019 in <b>Field Override</b> and a in the <b>Sub Field Override</b> with the 035\$a index selected. If there is no 019\$a in the incoming record, no matching is done.</p>
Field Weight	<p>Allows you to assign a numerical value (weight) to each field selected to be used in conjunction with the information specified on the <b>Quality Hierarchy</b> 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.</p> <p>See <a href="#">Authority Record Duplicate Detection Processing</a> on page 4-13 for more information about the <b>Field Weight</b> value.</p>

Example:

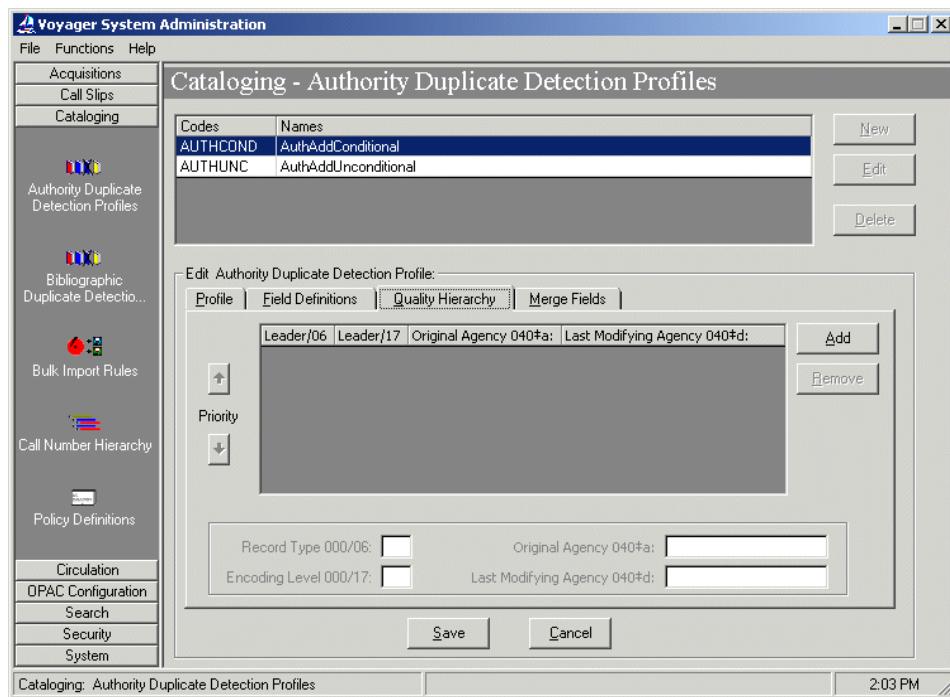
**Field/Sub Field Override.** To compare the 019 field of an incoming OCLC record with the 035\$a index in the database, specify 019 in **Field Override** and a in the **Sub Field Override** with the 035\$a index selected.

**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.

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



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

**Table 4-3. Quality Hierarchy tab options**

Options	Description
Record Type 000/06	Leader 6-7 fields.
Encoding Level 000/17	The institution's leader value.
Original Agency 040‡a	The create institution's unique identifying code (040‡a).
Last Modifying Agency 040‡d	The modifying institution's identifying code (040‡d).

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.

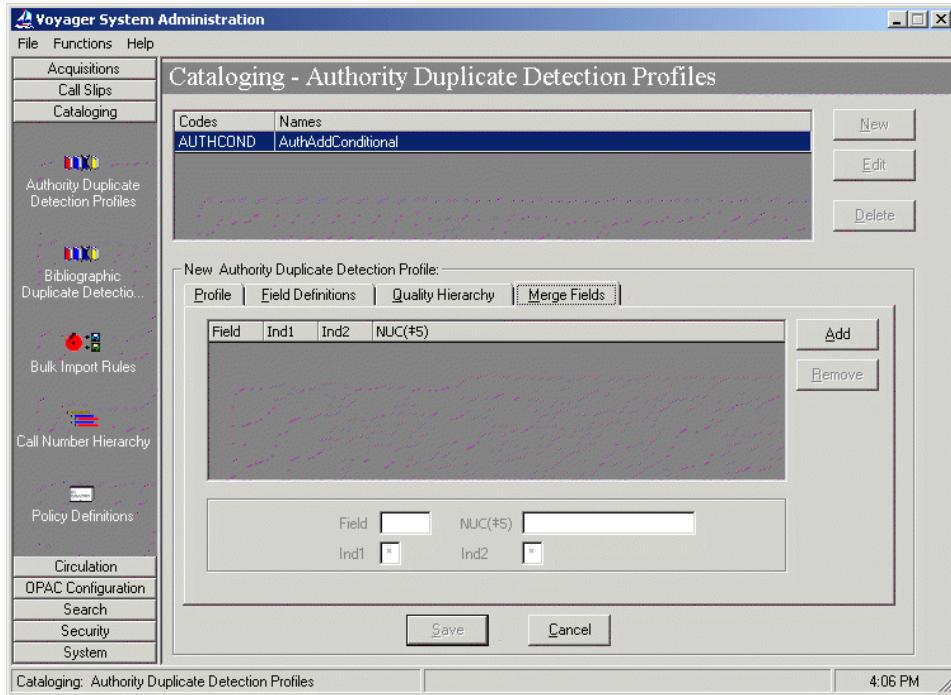
Use the **Record Type 000/06**, **Encoding Level 000/17**, **Original Agency 040‡a**, and **Last Modifying Agency 040‡d** text boxes to enter new information or edit existing information.

**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 4-17](#). See [Table 4-4](#) for a description of available options on the **Merge Fields** tab.

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



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

**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.

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 4-17](#) 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 4-17](#) 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 4-17](#) 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 4-17](#) 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 4-17](#) 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 <b>Authority Dedupe Detection</b> 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 <b>Authority Dedupe Detection</b> 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.
Two or More Matches	Record is not added. Duplicate detection warning is displayed through the <b>Authority Dedupe Detection</b> 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 <b>Authority Dedupe Detection</b> 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 <b>Authority Dedupe Detection</b> 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 <a href="#">Figure 4-6</a> on <a href="#">page 4-12</a> ) 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 <b>Authority Dedupe Detection</b> 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
deleted.auth.yyyymmdd.hhmm	Bulk Import	Authority	Used when the duplicate detection profile removes records that are currently in the database and replaces them with the imported record and there is only one candidate equal to or above the value specified in the <b>Duplicate Replace</b> field
deleted.imp.yyyymmdd.hhmm	Bulk Import	Bib	Used when the duplicate detection profile removes records that are currently in the database and replaces them with the imported record and there is only one candidate equal to or above the value specified in the <b>Duplicate Replace</b> field
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 <b>Duplicate Replace</b> field

**Table 4-9. Files Used in Duplicate Detection Processing**

File Name	Bulk Import or Online Entry	Author- ity 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 <b>Duplicate Replace</b> 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	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**

<b>File Name</b>	<b>Bulk Import or Online Entry</b>	<b>Author- ity or Bib Record</b>	<b>Description</b>
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	Bulk Import	Both	Used to store records that cannot be processed
log.imp.yyyymmdd.hhmm	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

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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 [4-20](#).



### **Procedure 4-2. Creating Bibliographic Duplicate Detection Profile**

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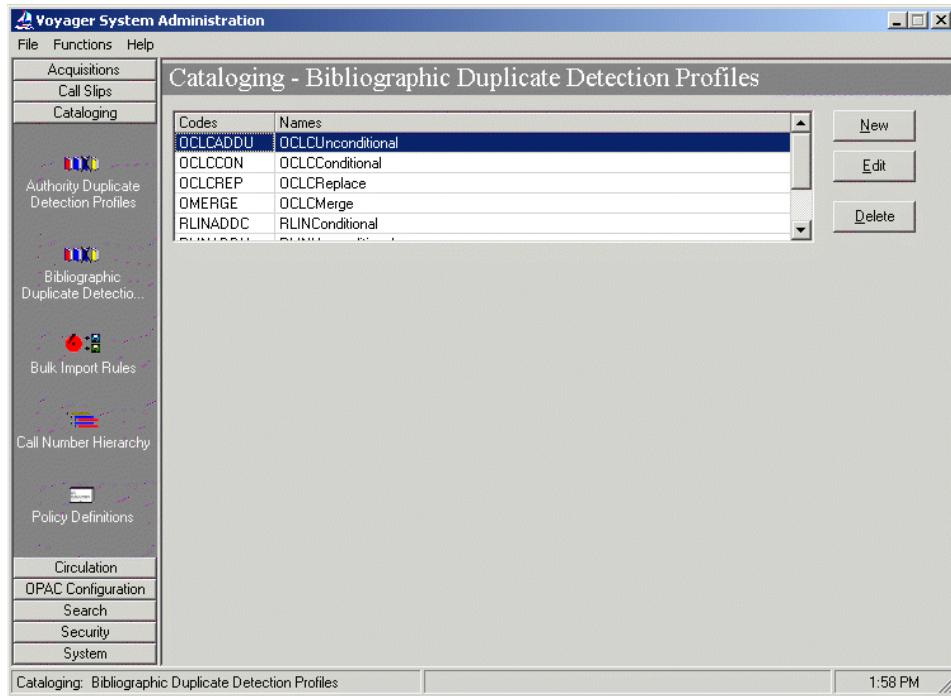
Use the following to create a Bibliographic Duplicate Detection Profile.

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](#).

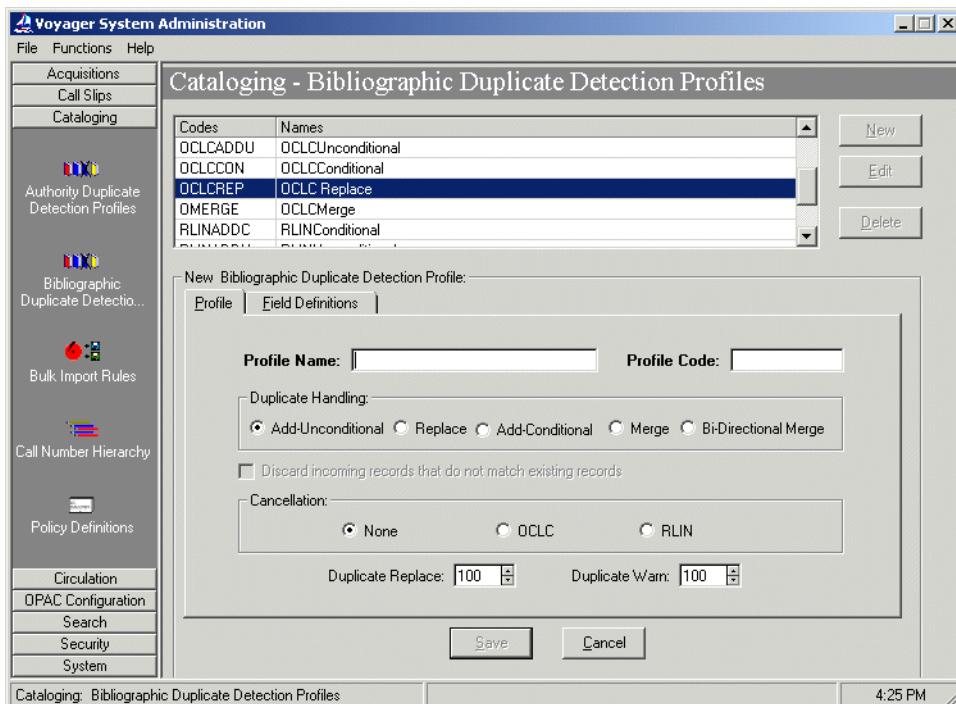


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**Figure 4-7. Cataloging - Bibliographic Duplicate Detection Profiles**

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**

- 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**

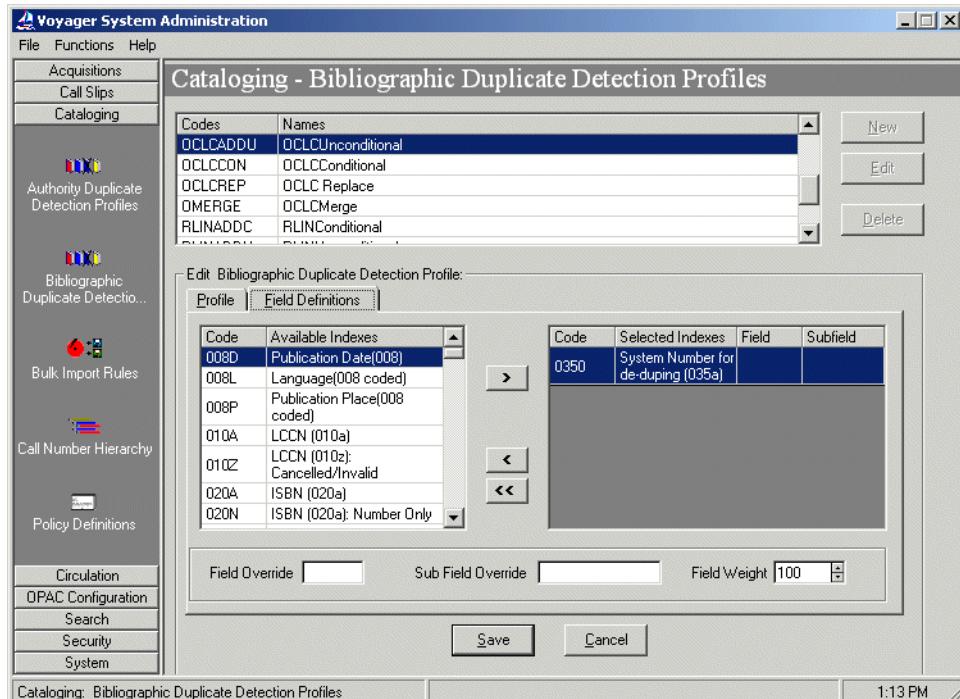
Options	Description
Duplicate Handling	<p><b>Add-Unconditional.</b> Specifies that any incoming record is added to the Voyager database even if a duplicate(s) is detected.</p> <p><b>Replace.</b> Specifies that when an incoming record matches an existing Voyager record, the incoming record replaces the Voyager record (if the quality of the incoming record meets or surpasses the values specified for <b>Duplicate Warn/Replace</b> and <b>Field Weight</b>) 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.</p> <p><b>Add-Conditional.</b> 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.</p> <p><b>Merge.</b> 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 <b>Merge Fields</b> 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.</p> <p><b>Bi-Directional Merge.</b> Select this option to extend the merge functionality in <b>Duplicate Handling</b>. 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.</p> <p><b>NOTE:</b> There are many components involved in the processing of records and <b>Duplicate Handling</b>. For more information about the logic in duplicate detection processing, files created and appended, deleted, discarded, replaced records, and so on, see <a href="#">Bibliographic Record Duplicate Detection Processing on page 4-31</a>, <a href="#">Profile Options and Duplicate Detection on page 4-31</a>, <a href="#">BulkImport Versus Online Entry on page 4-32</a>, and <a href="#">Files Affected By Duplicate Detection Processing on page 4-36</a>.</p>

**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	<b>None.</b> Select <b>None</b> 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.  <b>OCLC.</b> Select <b>OCLC</b> 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.  <b>RLIN.</b> Select <b>RLIN</b> 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.  <b>NOTE:</b> A valid <b>Duplicate Warn</b> value must be less than or equal to the specified <b>Duplicate Replace</b> value. A valid <b>Duplicate Warn</b> value must be specified in order to save the duplicate detection profile.

5. 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 4-31 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 <b>Sub Field Override</b> option to have the system use something other than the default fields in the index for duplicate detection comparisons. See the <b>Field/Sub Field Override</b> example.
Sub Field Override	Use this option in combination with the <b>Field Override</b> option to have the system use something other than the default fields in the index for duplicate detection comparisons. See the <b>Field/Sub Field Override</b> 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 <b>Quality Hierarchy</b> 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:

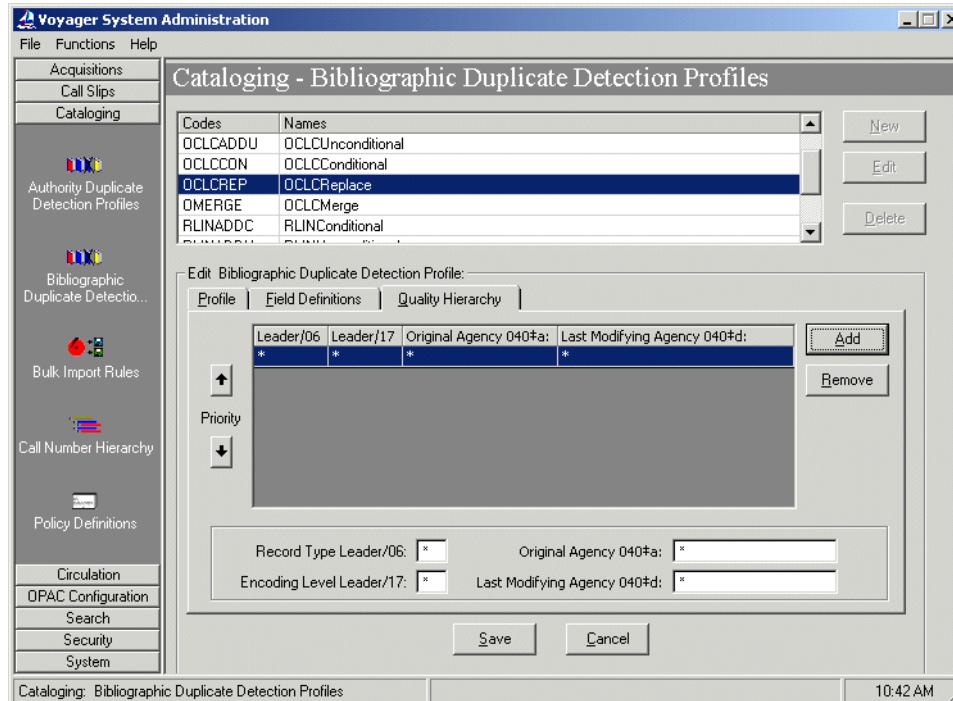
**Field/Sub Field Override.** To compare the 019 field in an incoming OCLC record with the 035\$*a* index in the database, specify 019 in **Field Override** and *a* in **Sub Field Override** with the 035\$*a* index selected.

#### 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.

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



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

**Table 4-12. Quality Hierarchy tab options**

Options	Description
Record Type Leader 000/06	Leader 6-7 fields.
Encoding Level Leader 000/17	The institution's leader value.
Original Agency 040#a	The create institution's unique identifying code (040#a).
Last Modifying Agency 040#d	The modifying institution's identifying code (040#d).

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.

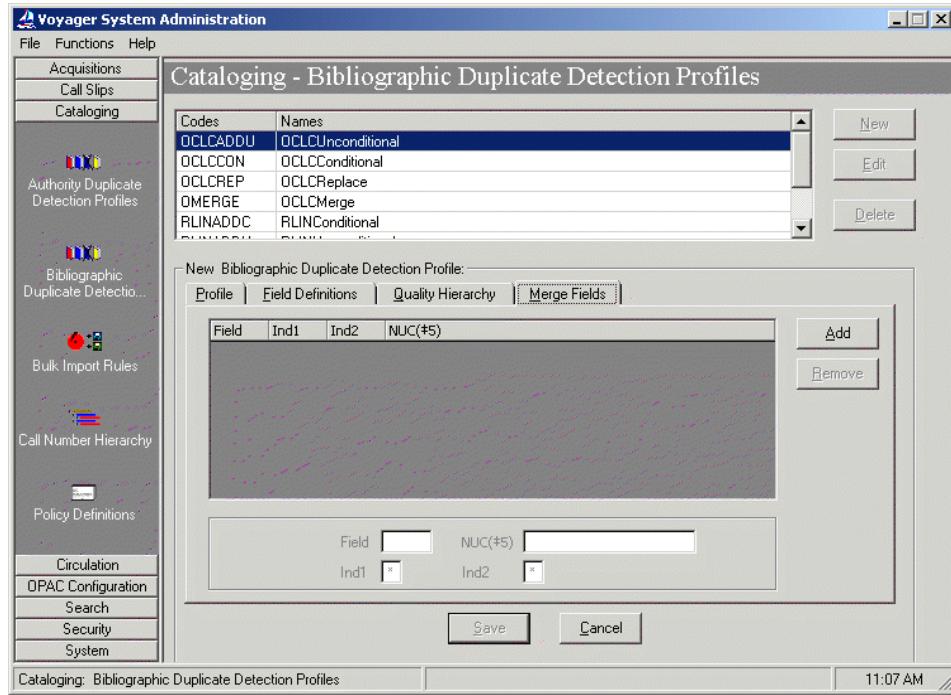
Use the **Record Type Leader 000/06, Encoding Level Leader 000/17, Original Agency 040\$\sharp a**, and **Last Modifying Agency 040\$\sharp d** text boxes to enter new information or edit existing information.

**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 4-36](#). See Table 4-13 for a description of available options on the **Merge Fields** tab.

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



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

**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.

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 4-36 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 4-36](#) 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 4-36](#) 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 4-36](#) 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.yyyyymmdd.hhmm` (see [Table 4-19 on page 4-36](#)) 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 4-36 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 <b>Bibliographic Dedupe Detection</b> 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 <b>Bibliographic Dedupe Detection</b> 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	Record 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 <b>Bibliographic Dedupe Detection</b> 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 <b>Bibliographic Dedupe Detection</b> 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 <b>Bibliographic Dedupe Detection</b> 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**

<b>Matches</b>	<b>Processing Options/Results</b>
No Match	Record is added.
One Match	Record is added/merged.  Merge is performed by taking specified fields (see <a href="#">Figure 4-11 on page 4-30</a> ) 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 <b>Bibliographic Dedupe Detection</b> 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**

<b>Matches</b>	<b>Processing Options/Results</b>
No Match	Record is added.
One Match	Record is added/merged.  If the incoming records 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	<p>Recorded is not added.</p> <p>The existence of duplicate records already in the original database prevents that particular record from being merged.</p> <p>Duplicate detection warning is displayed through the <b>Bibliographic Dedupe Detection</b> dialog box with several processing options from which to choose to include retrieving/viewing one or more existing duplicate bibliographic records.</p>

### 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
deleted.auth.yyyymmdd.hhmm	Bulk Import	Authority	Used when duplicate detection profile removes records that are currently in the database and replaces them with the imported record and there is only one candidate equal to or above the value specified in the <b>Duplicate Replace</b> field

**Table 4-19. Files Used in Duplicate Detection Processing**

<b>File Name</b>	<b>Bulk Import or Online Entry</b>	<b>Author- ity or Bib Record</b>	<b>Description</b>
deleted.imp.yyyymmdd.hhmm	Bulk Import	Bib	Used when duplicate detection profile removes records that are currently in the database and replaces them with the imported record and there is only one candidate equal to or above the value specified in the <b>Duplicate Replace</b> field
deleted.auth.marc	Online	Authority	Used when 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 <b>Duplicate Replace</b> field
deleted.bib.marc	Online	Bib	Used when 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 <b>Duplicate Replace</b> field
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

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**Table 4-19. Files Used in Duplicate Detection Processing**

File Name	Bulk Import or Online Entry	Authority or Bib Record	Description
discard.imp.yyyymmdd.hhmm	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
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

**Table 4-19. Files Used in Duplicate Detection Processing**

<b>File Name</b>	<b>Bulk Import or Online Entry</b>	<b>Author-ity or Bib Record</b>	<b>Description</b>
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	Bulk Import	Both	Used to store records that cannot be processed
log.imp.yyyymmdd.hhmm	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**

Bulk Import Rules allow you to create the rules that you want followed for importing bibliographic records that include location mapping of holdings and item records. Import/replace profiles define what happens when new records are imported into the database.

## Creating Bulk Import Rule

[Procedure 4-3, Creating Bulk Import Rule](#), shows how to create a Bulk Import Rule.



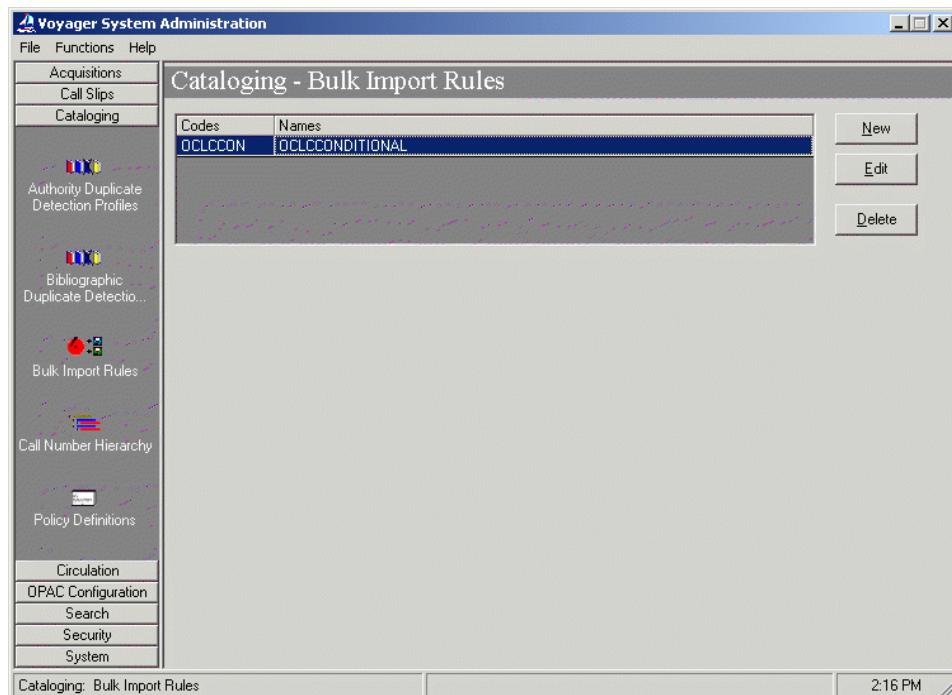
### Procedure 4-3. Creating Bulk Import Rule

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](#).

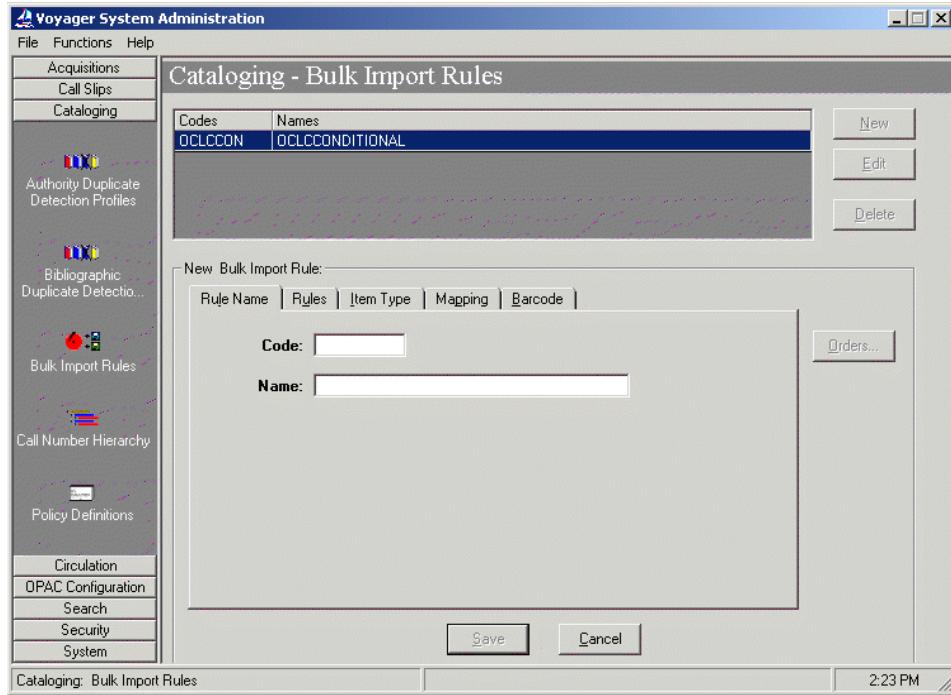


**Figure 4-12. Cataloging - Bulk Import Rules**

3. Click **New**.

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

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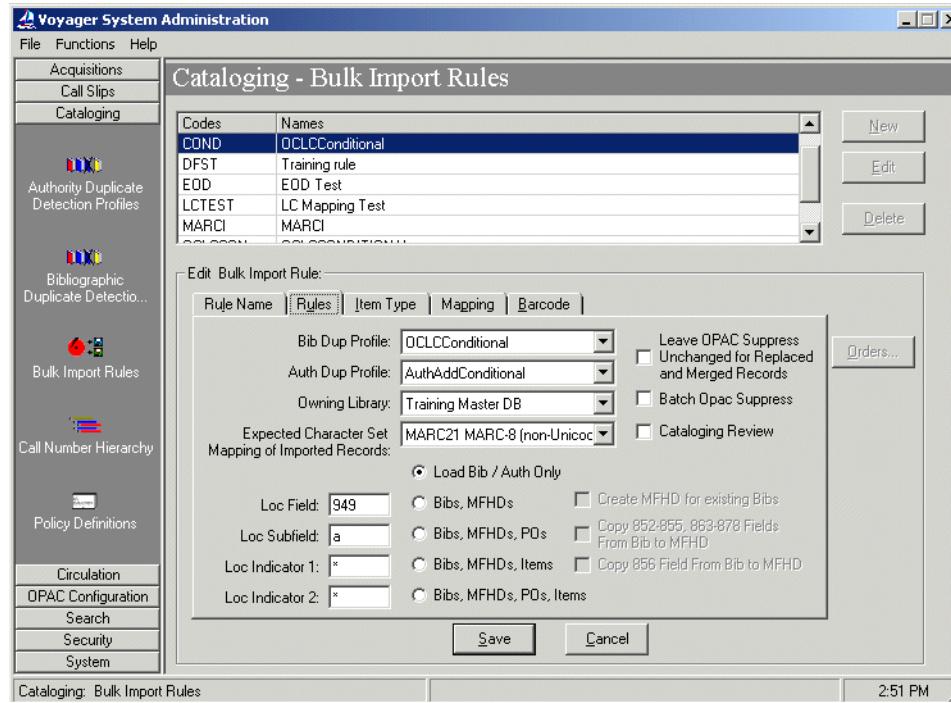
**Figure 4-13.** New Bulk Import Rule options

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.

Result: The **Rules** tab options display. See [Figure 4-14](#).



**Figure 4-14. Rules tab options**

- Enter the **Rules** tab options that match your requirements. See [Table 4-20](#) for a description of available options on the **Rules** tab.

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

**Table 4-20. Rules tab options (Page 1 of 4)**

Option	Description
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 <b>Replace</b> or <b>Merge</b> specified as the <b>Duplicate Handling</b> method.
Batch OPAC Suppress	Mark the Batch OPAC Suppress check box to suppress all incoming bibliographic records from WebVoyage.

**Table 4-20. Rules tab options (Page 2 of 4)**

Option	Description
Cataloging Review	<p>If the Cataloging Review check box is checked, an item record Cataloging review status is added to indicate that the records need review by Cataloging. This option is a consideration only when you are creating item records.</p> <p>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.</p>
Bib Dup Profile	<p>Select a bibliographic duplicate detection profile. Duplicate records are matched on indexes. Duplicates are handled by the rules set in the profile selected.</p> <p><b>Important:</b> The bibliographic duplicate detection profile selected for the Rule for importing embedded order data (EOD) may need to specify the <b>Add - Unconditional</b> option for <b>Duplicate Handling</b> to insure that all line item data is added to a purchase order in Acquisitions. See <a href="#">Embedded Order Data on page C-1</a> for more information about setups for importing order data.</p>
Auth Dup Profile	<p>Select an authority duplicate detection profile. Duplicate records are matched on indexes. Duplicates are handled by the rules set in the profile selected.</p>
Owning Library	<p>Select the owning library to indicate which owning library can edit or add to the record.</p> <p><b>NOTE:</b> Owning Library must match in order for Replace to occur.</p>
Expected Character Set Mapping of Imported Records	<p>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.</p>
Loc. Field Loc. Subfield Loc. Indicator 1 Loc. Indicator 2	<p>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.</p>

**Table 4-20. Rules tab options (Page 3 of 4)**

Option	Description
Load Bib/Auth Only	Select this option to have Bulk Import automatically load bibliographic and authority records from the incoming MARC data.  <b>NOTE:</b> 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 <b>Order</b> button to become active for mapping information in the bibliographic records to new purchase orders. See Step <a href="#">7</a> 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, Items, POs	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 <b>Order</b> button to become active for mapping information in the bibliographic records to new purchase orders. See Step <a href="#">7</a> for more information.
Create MFHD 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.  <b>NOTE:</b> 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 will not be added when the maximum number of duplicate bibliographic records is detected.

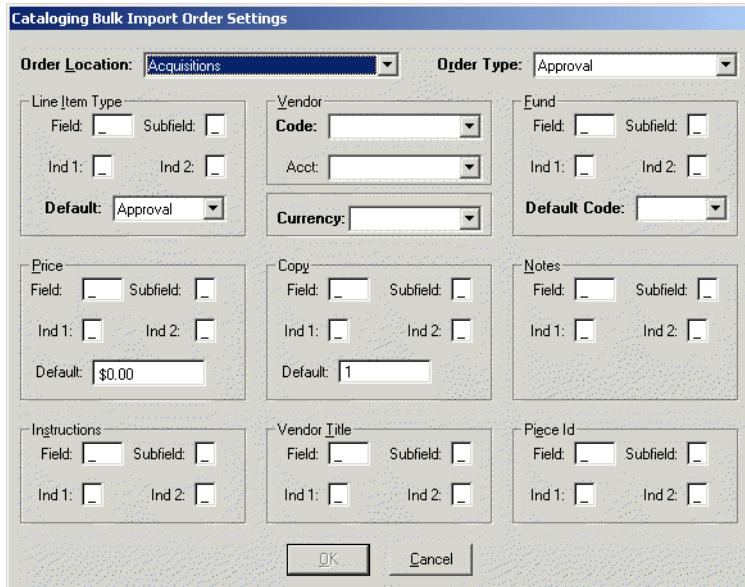
**Table 4-20. Rules tab options (Page 4 of 4)**

Option	Description
Copy 852-855, 863-878 Fields From Bib to MFHD	<p>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:</p> <ul style="list-style-type: none"> <li>• Bibs, MFHDs</li> <li>• Bibs, MFHDs, POs</li> <li>• Bibs, MFHDs, Items</li> <li>• Bibs, MFHDs, POs, Items</li> </ul>
Copy 856 Field From Bib to MFHD	<p>Select this option to enable the 856 field from the imported bibliographic record to be automatically copied into the newly created MFHD.</p> <p><b>NOTE:</b> This option is available only after the <b>Copy 852-855, 863-878 Fields From Bib to MFHD</b> option is selected.</p>

**OPTIONAL:**

7. Click the **Orders** button (which is only active when either Bibs, MFHDs, POs or Bibs, MFHDs, POs, Items is selected on the **Rules** tab) and enter the options (see [Figure 4-15](#)) 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 4-20](#) for a description of available options on the **Rules** tab.

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



**Figure 4-15. Cataloging Bulk Import Order Settings**

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. BulkImport simply uses the options that have already been created and uses them for importing embedded order data (EOD).

**Table 4-21. Orders options (Page 1 of 4)**

Option	Description
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.
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.

**Table 4-21. Orders options (Page 2 of 4)**

Option	Description
Line Item Type: Field, Subfield, Indicator 1, Indi- cator 2, Default	<p>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.</p> <p>This is a required field.</p>
Vendor: Code, Acct	<p><b>Code.</b> 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.</p> <p><b>Acct.</b> Use the Acct field to specify the vendor account for the vendor from whom the records came.</p> <p>This is a required field.</p> <p><b>NOTE:</b> You need a different Bulk Import profile for each vendor.</p>
Currency	<p>Select a currency code from the Currency drop-down list to specify the currency of the Purchase Order.</p> <p>This is a required field.</p>

**Table 4-21. Orders options (Page 3 of 4)**

Option	Description
Fund: Field, Subfield, Indicator 1, Indi- cator 2, Default	<p>Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where fund information is to be found in the incoming record.</p> <p>Click the Default drop-down list to select a default fund to be used if there is no fund 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.</p> <p>The Fund Code from the incoming record must be valid (an exact match of what is stored in Acquisitions) or the Default Fund Code is used.</p> <p><b>! IMPORTANT:</b> <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></p> <p>This is a required field.</p> <p><b>NOTE:</b> 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.</p> <p>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.)</p> <p>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.</p>

**Table 4-21. Orders options (Page 4 of 4)**

Option	Description
Price: Field, Subfield, Indicator 1, Indi- cator 2, Default	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. <b>NOTE:</b> When entering an amount in the Default field, both dollars and cents need to be specified. For example \$10.00 versus \$10. This is a required field.
Copy: Field, Subfield, Indicator 1, Indi- cator 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 copy number 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. This is a required field.
Notes: Field, Subfield, Indicator 1, Indi- cator 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.
Instruction: Field, Subfield, Indicator 1, Indi- cator 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.
Title No: Field, Subfield, Indicator 1, Indi- cator 2	Use the Field, Subfield, Indicator 1, and Indicator 2 fields to specify where the title number is to be found in the record that is being imported. This is used for EDI matching.
Piece ID: Field, Subfield, Indicator 1, Indi- cator 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.

8. Click **Save** or click **Cancel**.

Result: This saves or cancels the **Cataloging Bulk Import Order Settings**.

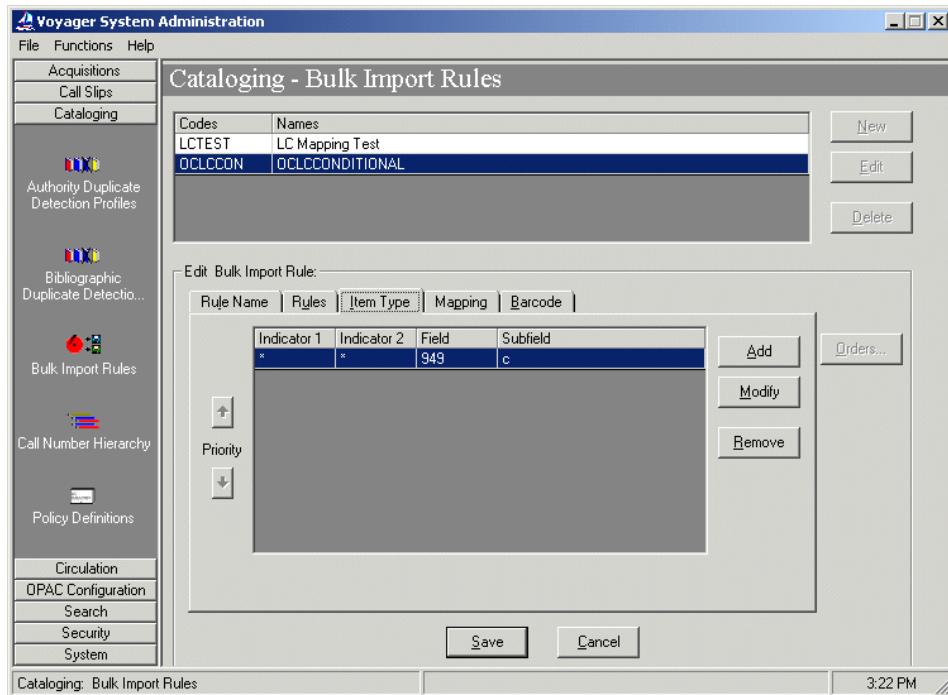
- 
9. Click the **Item Type** tab.

**NOTE:**

You only need to specify **Item Type** options when creating item records.

Result: The **Item Type** dialog box opens. See [Figure 4-16](#).

---



**Figure 4-16. Item Type tab**

10. 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 4-22](#) 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 4-22. 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.

11. Click **Save** or click **Cancel**.

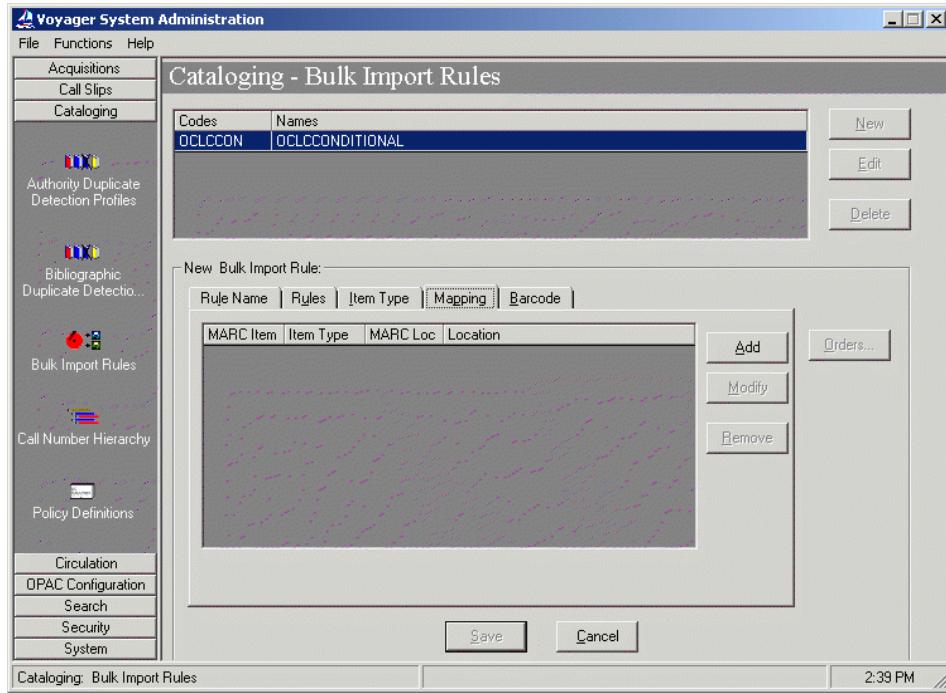
Result: This saves or cancels the **Cataloging Bulk Import Item Settings**.

12. 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.

Result: The **Mapping** dialog box opens. See [Figure 4-17](#).



**Figure 4-17. Mapping tab**

13. Click **Add** and enter the options that match your requirements to create a hierarchy for location and item information within the imported records. See [Table 4-23](#) for a description of available options on the **Mapping** tab.

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

**Table 4-23. 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.

**Table 4-23. Mapping tab options**

<b>Option</b>	<b>Description</b>
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.
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 <b>Rules</b> 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 <b>Rules</b> 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 <b>‡h</b> and <b>‡i</b> subfields. You must have at least one Call Number Hierarchy defined in <b>Cataloging - Call Number Hierarchy</b> to make a selection in this field. You must have selected one of the options on the <b>Rules</b> 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. 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.

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.

14. Click **Save** or click **Cancel**.

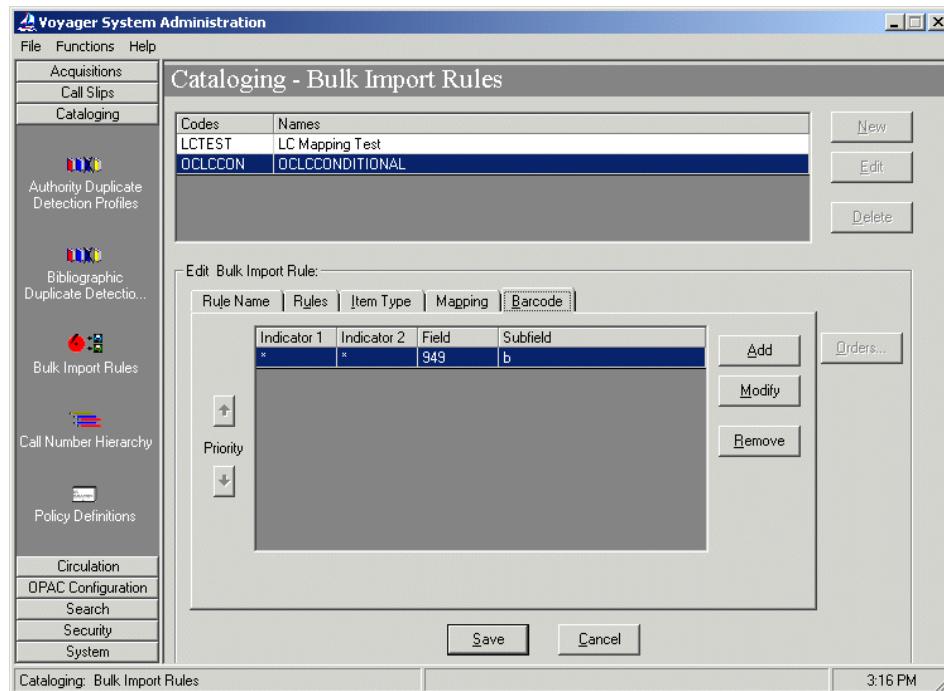
Result: This saves or cancels the **Cataloging Bulk Import Mapping Settings**.

15. Click the **Barcode** tab.

**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 4-18](#).



**Figure 4-18. Barcode tab**

16. 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 4-24](#) for a description of available options on the **Barcode** tab.

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

**Table 4-24. 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 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.

17. Click **Save** or click **Cancel**.

Result: This saves or cancels the **Cataloging Bulk Import Barcode** options.

18. Click **Save** or click **Cancel**.

Result: This saves or cancels the entire Bulk Import Rule.

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## Call Number Hierarchy

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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

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[Procedure 4-4, Creating Call Number Hierarchy](#),” shows how to create a Call Number Hierarchy.



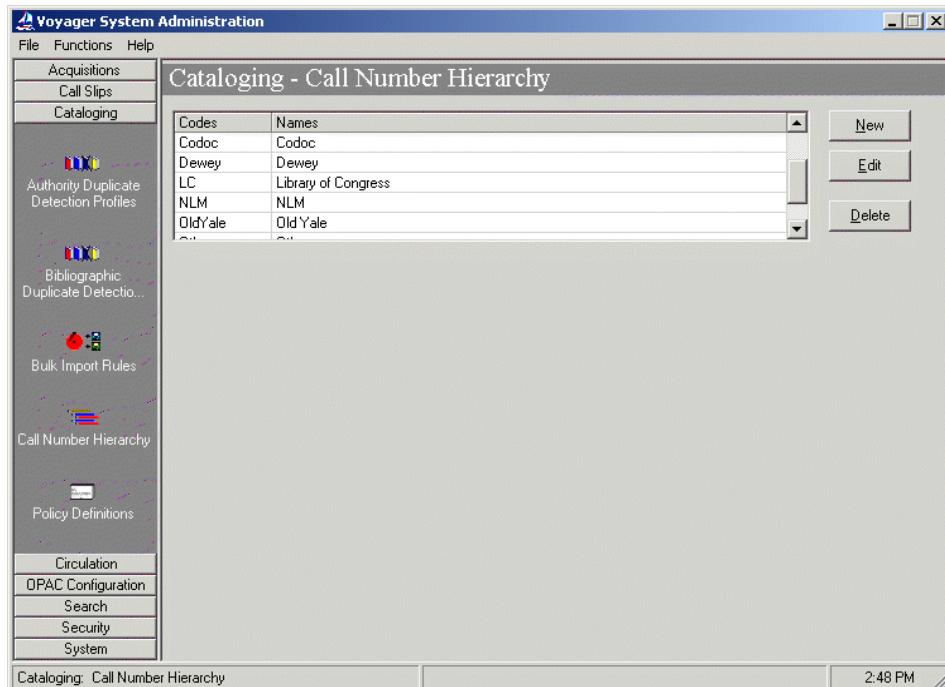
## Procedure 4-4. Creating Call Number Hierarchy

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

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

2. Click **Call Number Hierarchy**.

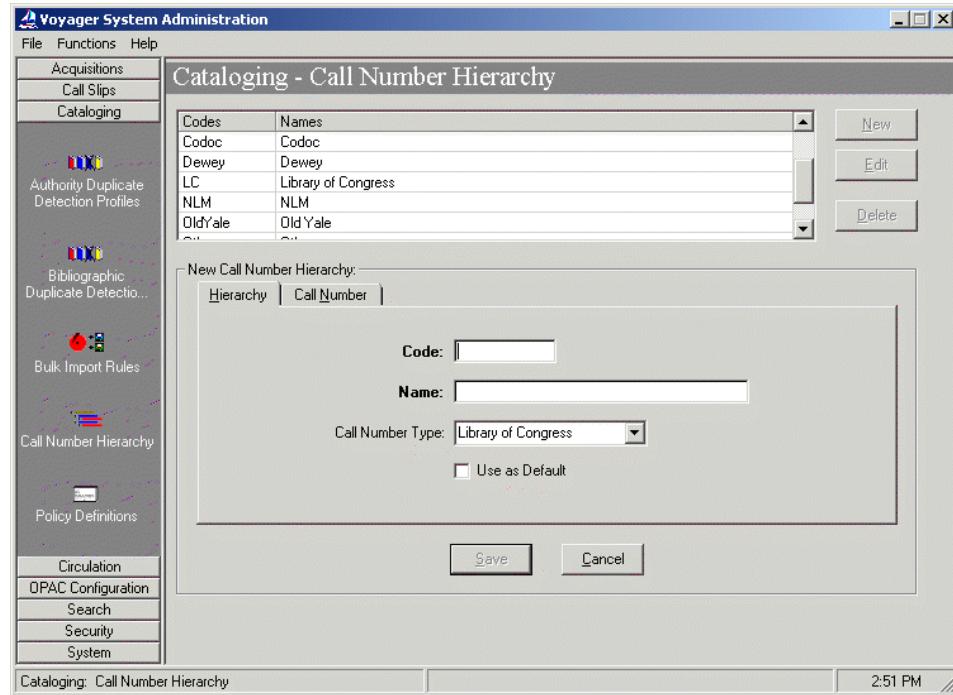
Result: The **Cataloging - Call Number Hierarchy** dialog box opens. See [Figure 4-19](#).



**Figure 4-19. Cataloging - Call Number Hierarchy**

3. Click **New**.

Result: The **New Call Number Hierarchy** options display. See [Figure 4-20](#).

**Figure 4-20.** Call Number Hierarchy tab options

4. Enter the **Hierarchy** tab options that match your requirements. See [Table 4-25](#) for a description of available options on the **Hierarchy** tab.

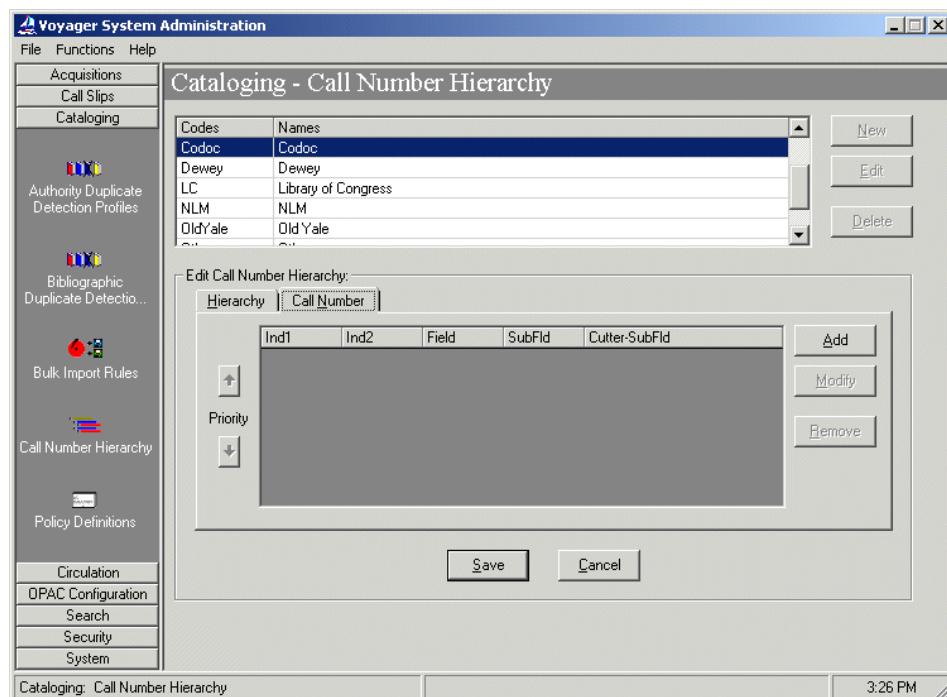
Result: The **Hierarchy** tab component of the **New Call Number Hierarchy** is complete.

**Table 4-25.** 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.

5. Click the **Call Number** tab.

Result: The **Call Number** tab options display. See [Figure 4-21](#).



**Figure 4-21. Call Number tab**

6. Enter the **Call Number** tab options that match your requirements. See [Table 4-25](#) 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 4-26. Call Number tab options**

Option	Description
Field	This option specifies the Cataloging field where the system looks in the bibliographic record for the call number.
Main Subfield	Enter the classification number, holdings record 852 ‡h.

**Table 4-26. 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.
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.
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:**

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.

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

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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.

## 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

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Use the following to create **Cataloging - Policy Definitions**.



### Procedure 4-5. Creating Cataloging - Policy Definitions

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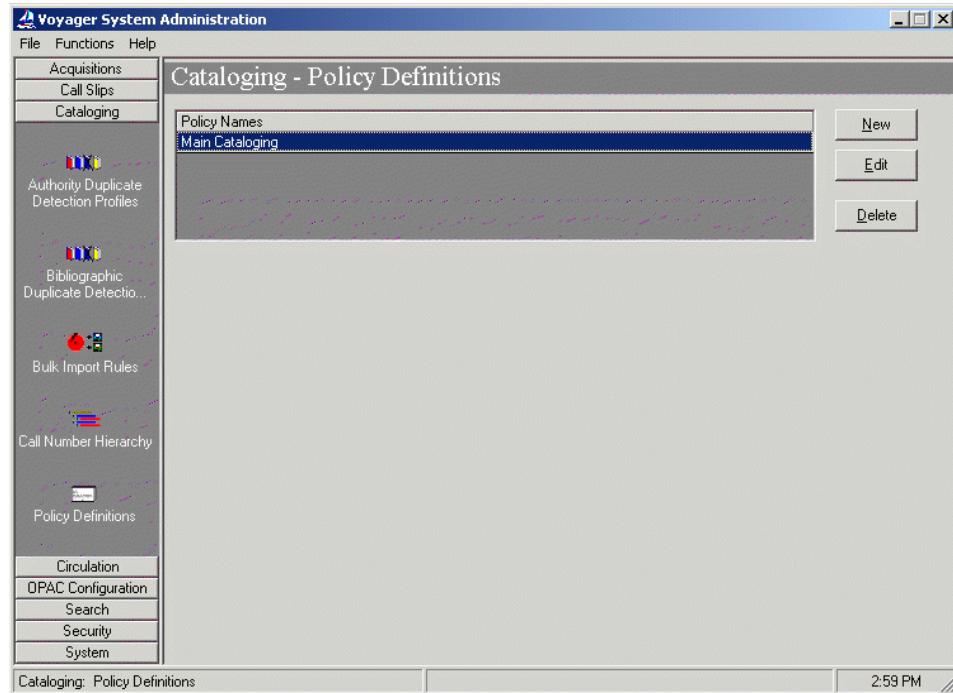
1. Click **Cataloging** on the vertical listbar.

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 4-22](#).

---

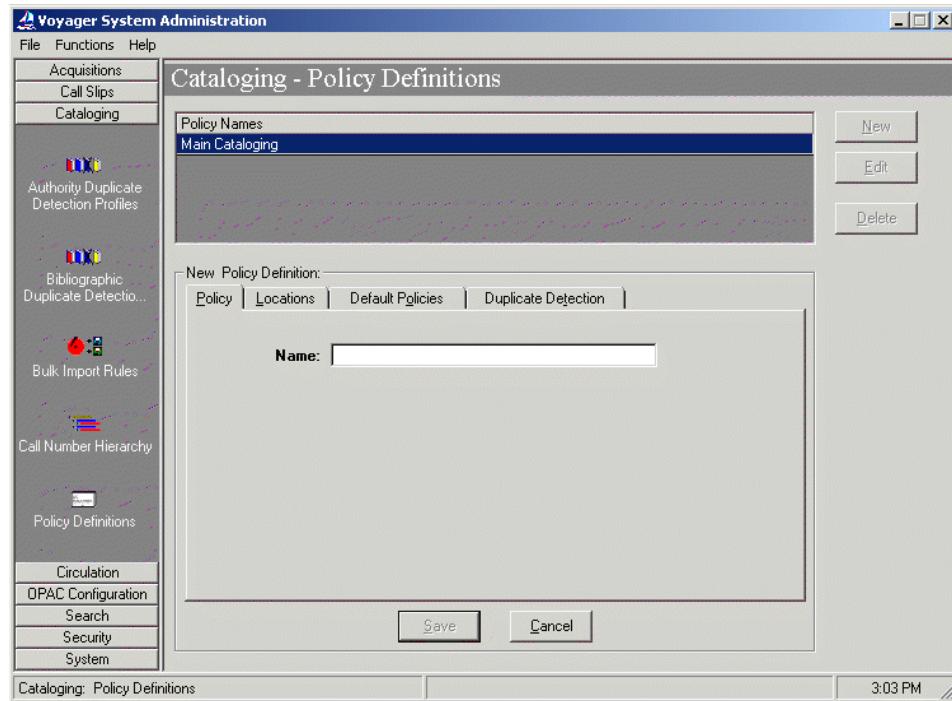


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**Figure 4-22. Cataloging - Policy Definitions**

3. Click **New**.

Result: The **New Policy Definition** options display. See [Figure 4-23](#).



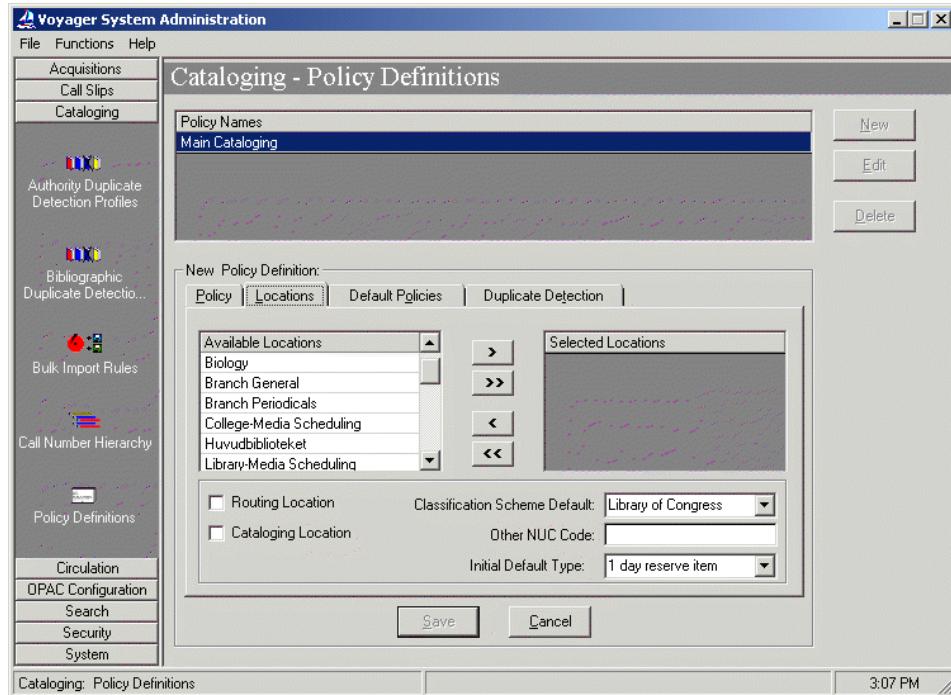
**Figure 4-23.** New Policy Definition options

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 4-24](#).



**Figure 4-24.** New Cataloging - Policy Definitions Locations tab options

6. Enter the options on the **Locations** tab that match your requirements. See [Table 4-27](#) 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 4-27.** New Cataloging - Policy Definitions Locations tab options

Options	Description
Available/Selected Locations	<p>Select a location from the <b>Available Locations</b> list using the <b>&gt;</b> button to move it to the <b>Selected Locations</b> list. Use Shift + Click to highlight multiple locations in the <b>Available Locations</b> list and the <b>&gt;&gt;</b> button to move multiple highlighted locations to the <b>Selected Locations</b> list. Only locations that have not already been assigned to a cataloging policy group display in the <b>Available Locations</b> list.</p> <p>Use the <b>&lt;</b> and <b>&lt;&lt;</b> buttons to remove locations from the <b>Selected Locations</b> list.</p> <p>For each location selected, specify one or more of the following options:</p>

**Table 4-27. 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.  <b>(r)</b> displays next to the location name in the <b>Selected Locations</b> list when the location is defined as a <b>Routing Location</b> .
Cataloging Location	Select <b>Cataloging Location</b> for a location where cataloging work is actually performed. At least one location in the cataloging policy group must be defined as a <b>Cataloging Location</b> .  <b>(c)</b> displays next to the location name in the <b>Selected Locations</b> list when the location is defined as a <b>Cataloging Location</b> .
Classification Scheme Default	Select a <b>Classification Scheme Default</b> to have the system automatically set values in the MARC holdings record for that scheme when the location in the <b>Selected Locations</b> list is chosen in the Cataloging client module.
Other NUC Code	Enter an <b>Other NUC Code</b> if the selected location has an NUC code other than the one defined for all the selected locations.  The system automatically uses the <b>Other NUC Code</b> for any item at the selected location when exporting records.
Initial Default Type	Select the <b>Initial Default Type</b> 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 4-25](#).

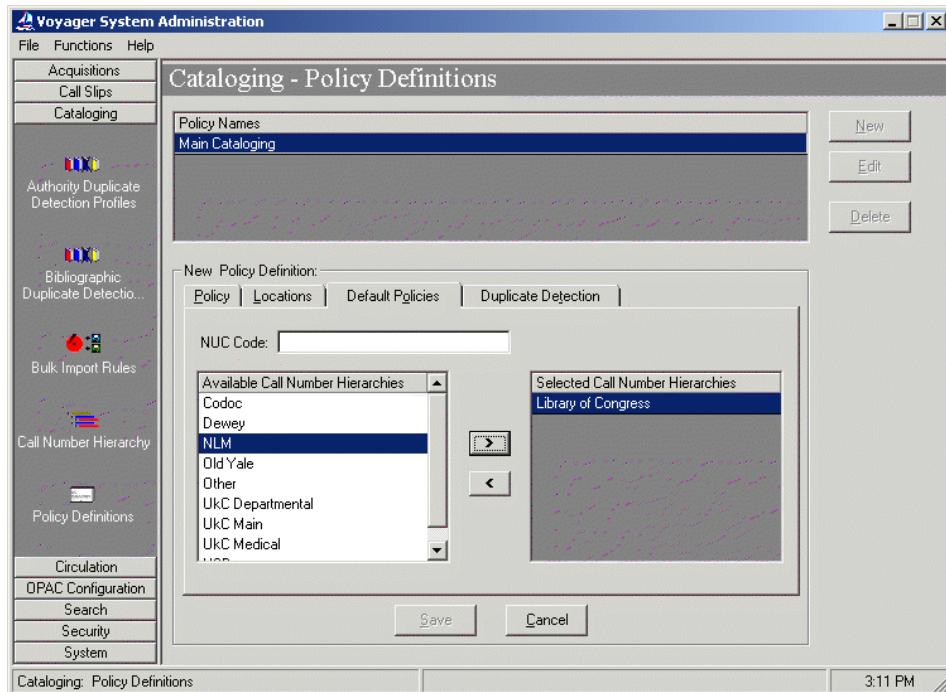


Figure 4-25. Default Policies tab

- Enter the options on the **Default Policies** tab that match your requirements. See [Table 4-28](#) for a description of available options on the **Default Policies** tab.

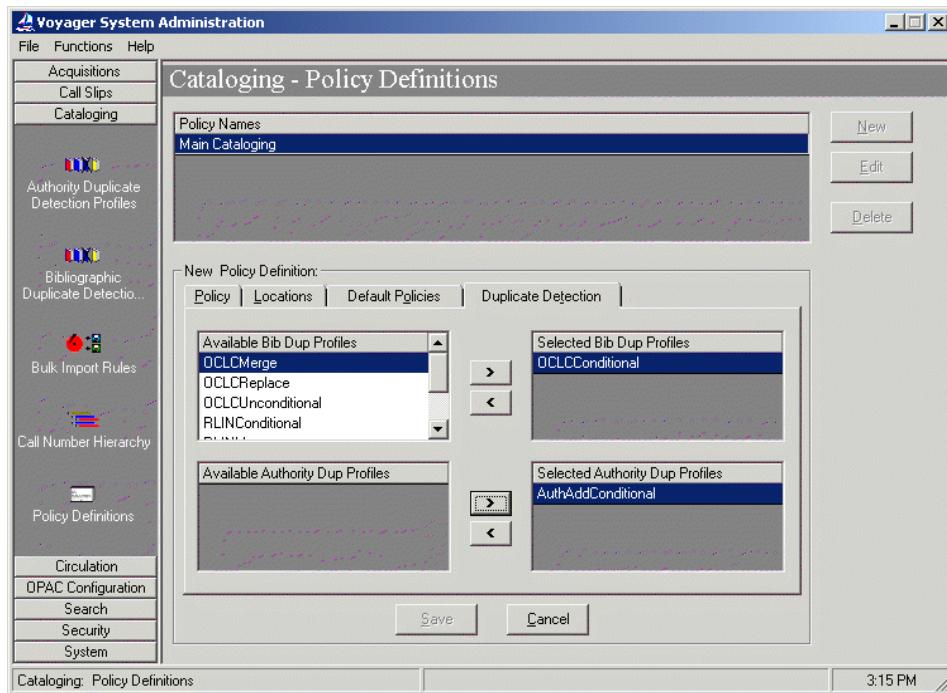
**Result:** This completes the **Default Policies** tab portion of the setup for a new cataloging policy group definition.

Table 4-28. 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 <b>Available Call Number Hierarchies</b> list using the > button to move it to the <b>Selected Call Number Hierarchies</b> list.  Use the < button to remove a location from the <b>Selected Call Number Hierarchies</b> list.

- Click the **Duplicate Detection** tab.

Result: This displays the **Duplicate Detection** tab options for the new policy definition. See [Figure 4-26](#).



**Figure 4-26. Duplicate Detection tab**

10. Enter the options on the **Duplicate Detection** tab that match your requirements. See [Table 4-29](#) 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 4-29. Duplicate Detection tab options**

Option	Description
Available/Selected Bib Dup Profiles	Select a bibliographic duplicate profile from the <b>Available Bib Dup Profiles</b> list using the > button to move it to the <b>Selected Bib Dup Profiles</b> list.  Use the < button to remove a bibliographic duplicate profile from the <b>Selected Bib Dup Profiles</b> list.

**Table 4-29. Duplicate Detection tab options**

Option	Description
Available/Selected Authority Dup Profiles	Select an authority duplicate profile from the <b>Available Authority Dup Profiles</b> list using the > button to move it to the <b>Selected Authority Dup Profiles</b> list.  Use the < button to remove an authority duplicate profile from the <b>Selected Authority Dup Profiles</b> list.

11. Click **Save** or click **Cancel**.

Result: This saves or cancels the **New Policy Definition for Cataloging - Policy Definitions**.

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[REDACTED]

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See notice on first page

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# Circulation Configuration

# 5

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## Circulation Configuration

# 5

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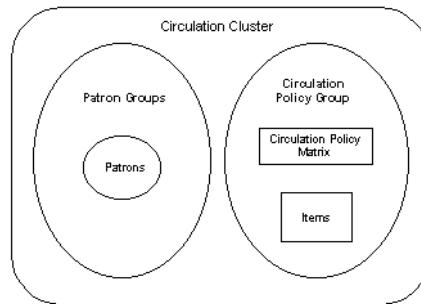
### Introduction

---

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.

Operators use the Circulation listbar ([Figure 5-2](#)) to access these functions.



---

**Figure 5-2. Circulation listbar**



**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.

---

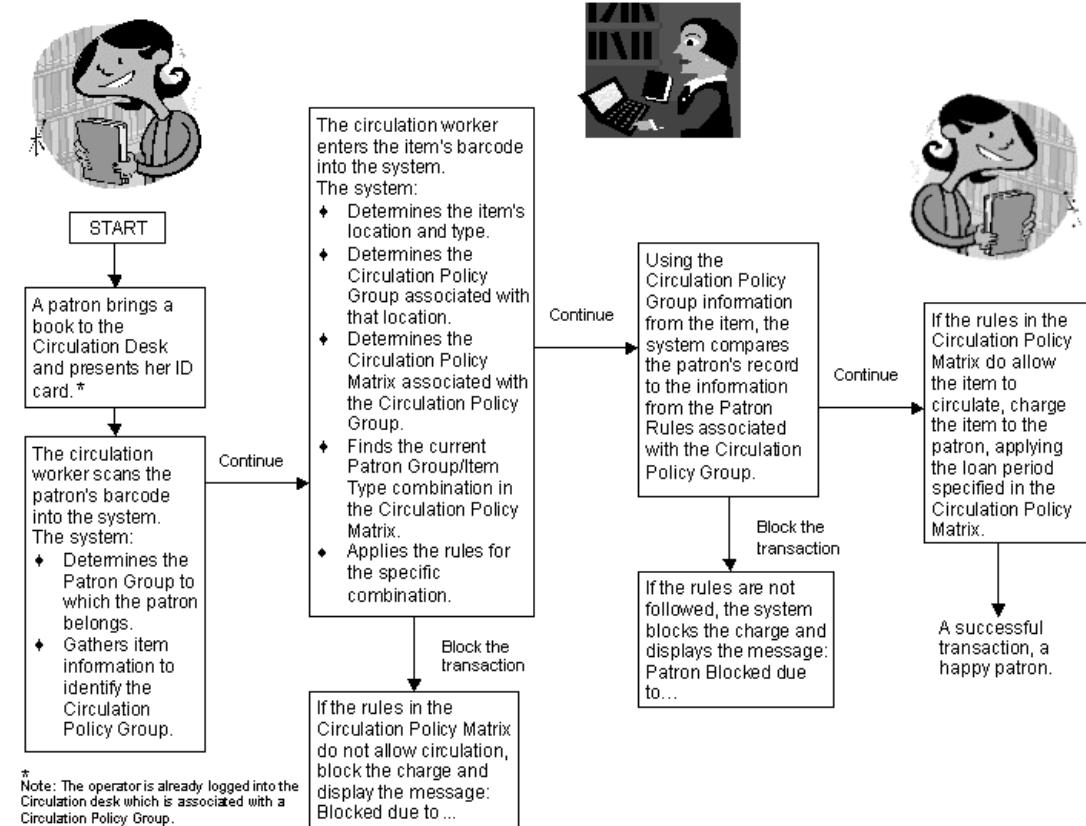
The circulation policies defined in a Circulation Policy Group are in effect for all patrons who are members of the patron groups within that Circulation Policy Group regardless of the item involved in the circulation transaction. Many of these policies involve the block points for patrons, such as the 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 5-3 on page 5-5](#).



**Figure 5-3. 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 9-23](#) for more information.

---

## Circulation - Cluster Maintenance Workspace

---

[Figure 5-4](#) shows the **Circulation - Cluster Maintenance** workspace.

**Circulation - Cluster Maintenance**

Codes	Name
CLUSTER1	Endeavor Training Database

New      Edit      Delete

Edit Cluster Maintenance:

Cluster Code:

Cluster Name:

OPAC Circ Desk:

Default Pickup Location:

---

**Figure 5-4. Circulation - Cluster Maintenance Workspace**

**NOTE:**

This operator has the ability to edit clusters. If the operator had view-only ability, there would be an active **View** button, not an active **Edit** button.

---

[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.

**Table 5-1. Fields in the Circulation - Cluster Maintenance Workspace**

Name	Description	Required	Type and Range
OPAC Circ Desk	The circulation desk that is used for circulation transactions occurring in WebVoyage.	Yes  See <a href="#">Circulation Locations (Circulation Happening Locations)</a> on page 5-57.	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.
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 <a href="#">Circulation Locations (Circulation Happening Locations)</a> on page 5-57.	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 (see [Figure 5-5](#)).
3. Place the cursor in the field(s) you want to edit and enter the appropriate information. In [Figure 5-5](#) the cluster name was changed from Endeavor Training Database to Endeavor Database.

The screenshot shows a dialog box titled "Edit Cluster Maintenance". It contains four input fields:

- Cluster Code: CLUSTER1
- Cluster Name: Endeavor Database
- OPAC Circ Desk: Circulation Desk
- Default Pickup Location: Circulation Desk

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

**Figure 5-5.** The Cluster Name field is edited

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 9-23.

## 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. However, the dates of the Circulation Calendars may not overlap.

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 will use a 12-hour clock.

## Circulation - Calendars Workspace

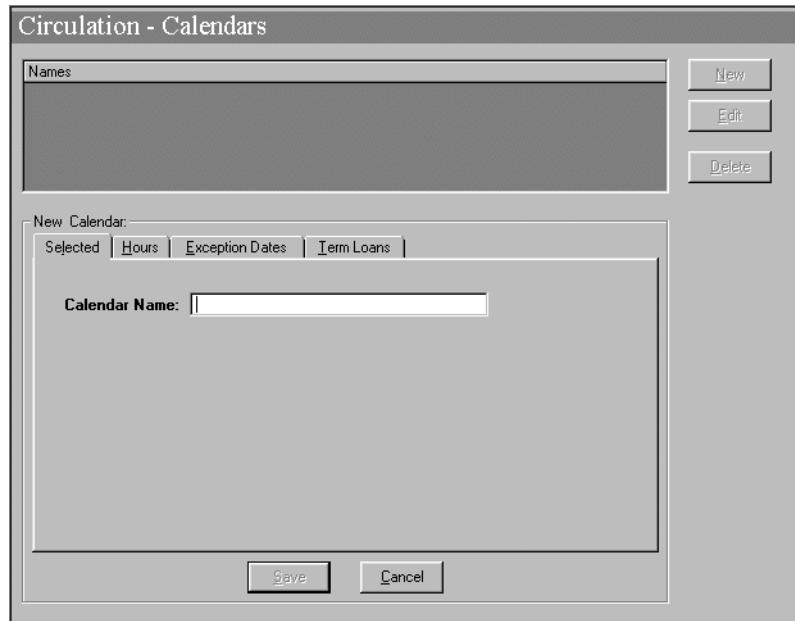
---

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 5-6](#)).

---



---

**Figure 5-6.** Circulation - Calendars Workspace

#### Selected Tab

[Figure 5-6](#) displays the **Selected** tab.

## Field Descriptions

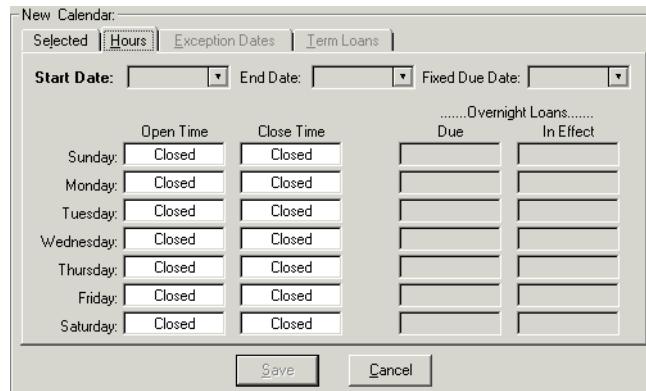
[Table 5-2](#) provides descriptions of the fields on the **Selected** tab of the **Circulation - Calendars** workspace, used to create and edit Circulation Calendars. The table provides names, descriptions, if required, and type and range requirements for the fields.

**Table 5-2. Fields on the Selected Tab of the Circulation - Calendars Workspace**

Name	Description	Required	Type and Range
Calendar Name	<p>The name given to the calendar. The calendars display alphabetically.</p> <p> <b>TIP:</b> <i>If your Calendar corresponds to a specific period of time, include that in your Calendar Name.</i></p>	Yes	<p>Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 25 characters.</p>

## Hours Tab

[Figure 5-7](#) displays the **Hours** tab.



**Figure 5-7. 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. The table provides names, descriptions, if required, and type and range requirements for the fields.

**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.  <b>NOTE:</b> 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 <a href="#">Circulation Policy Matrix</a> on page 5-77.	Date  It must be the same as or fall after the Calendar's Start Date.

**Table 5-3. Fields on the Hours Tab of the Circulation - Calendars Workspace**

Name	Description	Required	Type and Range
Open Time (per day)	The time that the circulation desk opens.  <b>NOTE:</b> If your library is open 24 hours a day, the system treats 5:00 AM as the beginning of a new day.  See <a href="#">Libraries open 24 hours</a> on <a href="#">page 5-21</a> .	No	Time
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 5-61](#) 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.

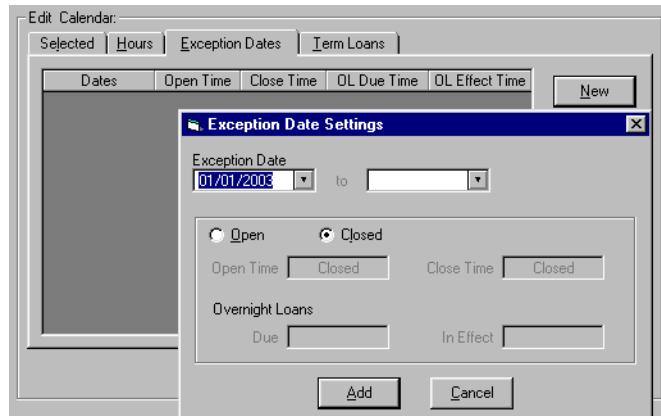
### Fixed Due Times for Short Loans

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 5-8](#) displays the **Exception Dates** tab and the **Exception Dates Settings** dialog box.



**Figure 5-8. 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**

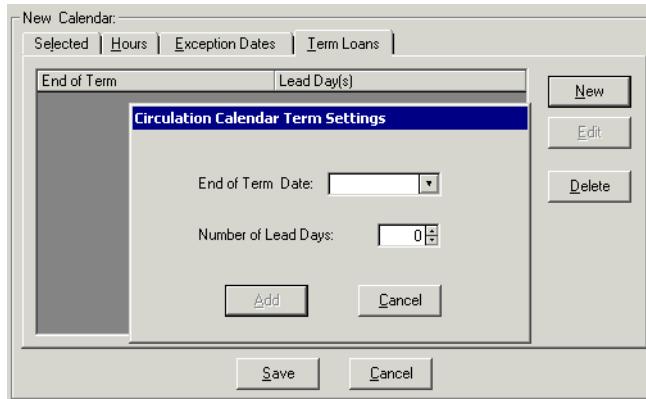
Name	Description	Required	Type and Range
Exception Date	Dates that deviate from the usual schedule defined in the Open/Closed values. This includes dates that are closed, when they would normally be open. Also, dates that are open when they would normally be closed. It also includes dates where the open/close 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.

**Table 5-4. Fields on the Exception Dates Tab of the Circulation - Calendars Workspace**

Name	Description	Required	Type and Range
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
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 5-9](#) displays the **Term Loans** tab, and the **Circulation Calendar Term Settings** dialog box.



**Figure 5-9.** 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 5-10](#).

---

Selected   Hours   Exception Dates   Term Loans	
End of Term	Lead Day(s)
5/16/2002	14
12/20/2002	14

**New**    **Edit**    **Delete**

---

**Figure 5-10. 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. For example, if your library is open 24 hours a day and you want to make your opening hours from midnight to midnight, enter your opening times as 12:00 AM to 11:59PM for each day.

---

The system treats 5:00 AM as the beginning of a new day. This is so that if your library is open from 10:00 AM Monday to 3:00 AM Tuesday, the entire period is considered to have taken place on Monday.

If your library closes later than 5:00 or opens earlier than 5:00 AM, regardless of what you set your opening and closing hours to be, 5:00 AM will be considered to be the end of the day. That is, if your library is open 24 hours a day, items checked out at 4:30 AM on Tuesday will still be considered to be a Monday charge and the due date will be counted starting with Monday. Items charged at 5:30, however, will be considered a Tuesday charge and the due date will be counted starting Tuesday.

## **Creating a Circulation Calendar**

---

This section provides step-by-step instructions on how to create a Circulation Calendar within the System Administration module.



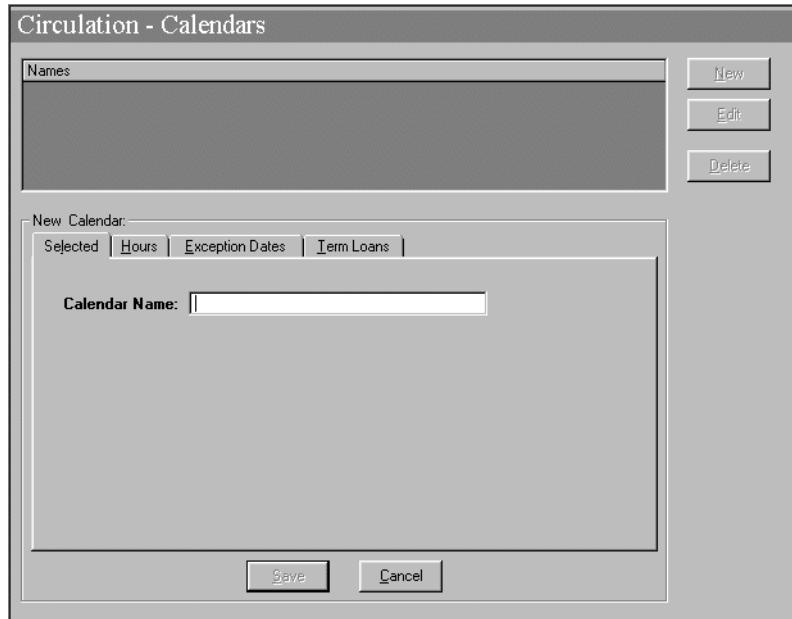
### **Procedure 5-2. Creating a Calendar**

---

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 (see [Figure 5-11](#)).



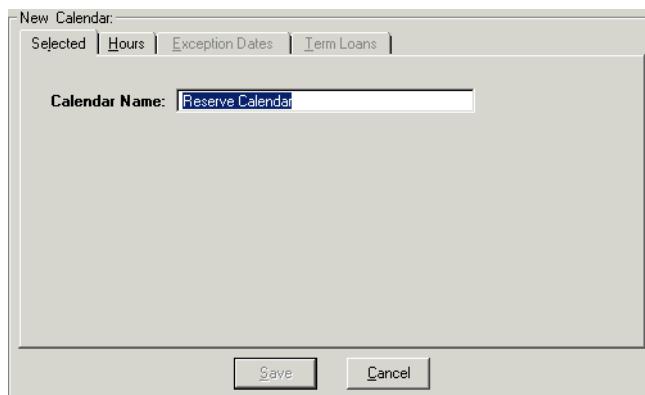
---

**Figure 5-11. Circulation - Calendars Workspace**

2. Click the **New** button.

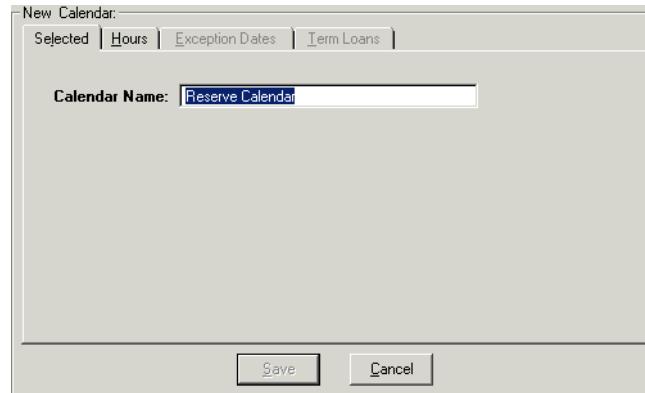
Result: The bottom half of the **Circulation - Calendars** workspace opens to the **Calendar** section (see [Figure 5-12](#)).

There are four tabs in the **Calendar** section: **Selected**, **Hours**, **Exception Dates**, and **Term Loans**.



**Figure 5-12.** Selected Tab

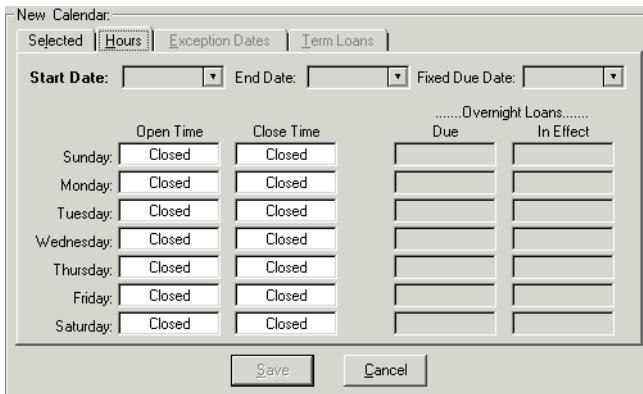
3. On the **Selected** tab, Enter the calendar name in the **Calendar Name** field (see [Figure 5-13](#)).



**Figure 5-13.** 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 5-14](#)).

**Figure 5-14. 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.*

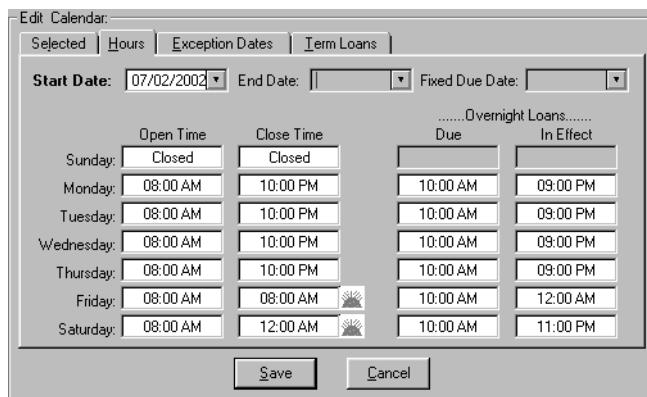
5. Enter the start date in the **Start Date** field.
6. Enter an end date and fixed due date in the **End Date** and **Fixed Due Date** fields if wanted.
7. In the **Open Time** field, enter the open time for each day of the week the desk is open.
8. In the **Close Time** field, enter the close time 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 5-15](#)).

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 5-15](#)).



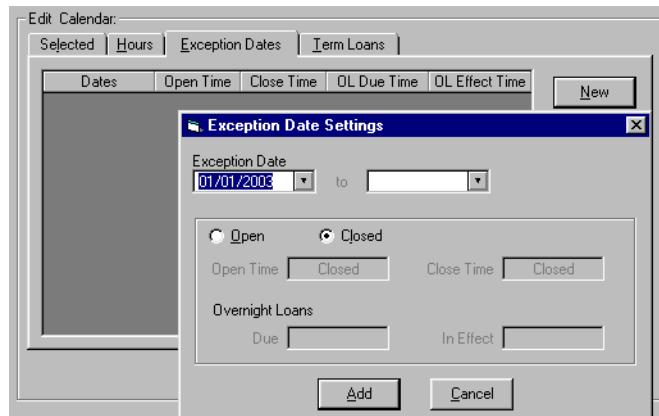
**Figure 5-15.** Hours Tab with its information

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 5-16](#)).



**Figure 5-16.** 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 5-17](#)).

**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	DL Due Time	DL Effect Time
1/1/2003	Closed	Closed		
7/4/2003	Closed	Closed		
1/1/2004	Closed	Closed		
7/21/2004	Closed	Closed		

**Figure 5-17.** List of Exceptions Dates displayed on the Exception Dates Tab

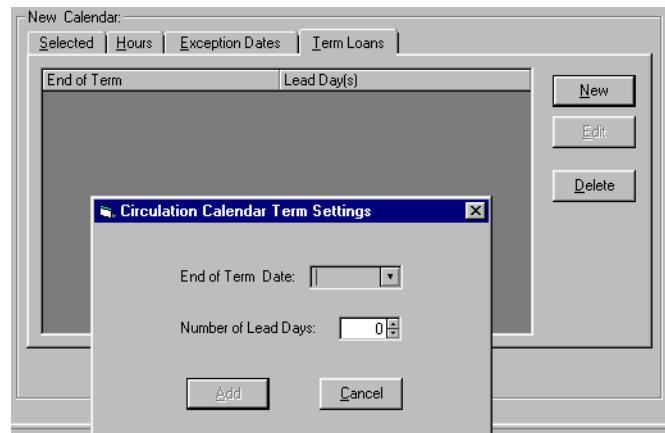
- 
14. Click the **Term Loans** tab if you use term loans.

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 5-18](#)).

---



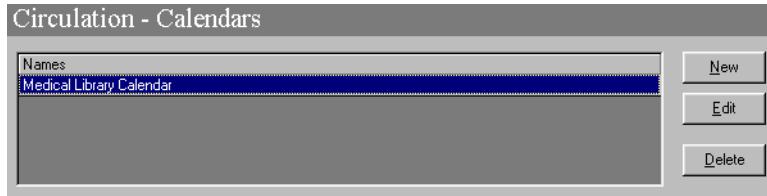
**Figure 5-18.** Circulation Calendar Term Settings dialog box

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 5-19](#)) in the **Circulation - Calendars** workspace.



---

**Figure 5-19. 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.

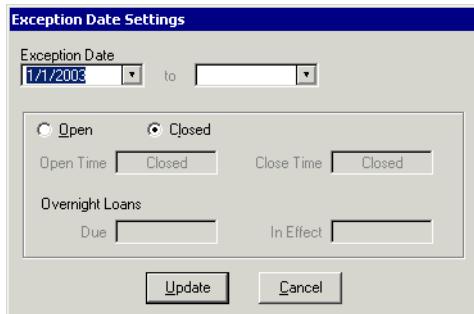


### Procedure 5-3. Editing a Circulation Calendar

---

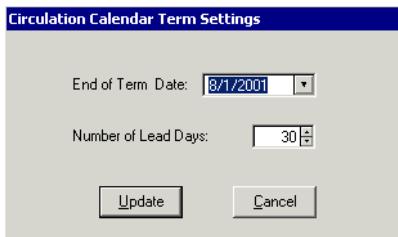
Use the following to edit a Circulation Calendar.

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 5-20](#)).



**Figure 5-20.** 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 5-21](#)).



**Figure 5-21.** 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 5-22](#)) 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.

The screenshot shows a software interface titled 'Edit Calendar'. At the top, there are tabs: 'Selected', 'Hours', 'Exception Dates', and 'Term Loans'. The 'Exception Dates' tab is active. Below the tabs is a table with columns: 'Dates', 'Open Time', 'Close Time', 'OL Due Time', and 'OL Effect Time'. There are five rows in the table. The first row (1/1/2003) and the fourth row (7/1/2004) have a light gray background. The second row (7/4/2003) and the third row (7/21/2004) have a dark blue background, indicating they are selected. To the right of the table are three buttons: 'New', 'Edit', and 'Delete'. The 'Delete' button is currently highlighted.

Dates	Open Time	Close Time	OL Due Time	OL Effect Time
1/1/2003	Closed	Closed		
7/4/2003	Closed	Closed		
7/1/2004	Closed	Closed		
7/21/2004	Closed	Closed		

**Figure 5-22. 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 5-23](#)).

This screenshot shows the same 'Edit Calendar' window after some deletions. The 'Exception Dates' tab is still active. The table now contains only two rows. The first row (2003-01-01) has a light gray background. The second row (2004-07-04) has a dark blue background and is highlighted. The 'Delete' button is visible on the right.

Dates	Open Time	Close Time	OL Due Time	OL Effect Time
2003-01-01	Closed			
2004-07-04	Closed			

**Figure 5-23. 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.

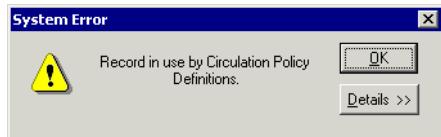
### **Deleting a Circulation Calendar**

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 5-24](#)). 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 5-24. Message received when unable to delete a Circulation Calendar**



#### **Procedure 5-4. Deleting a Circulation Calendar**

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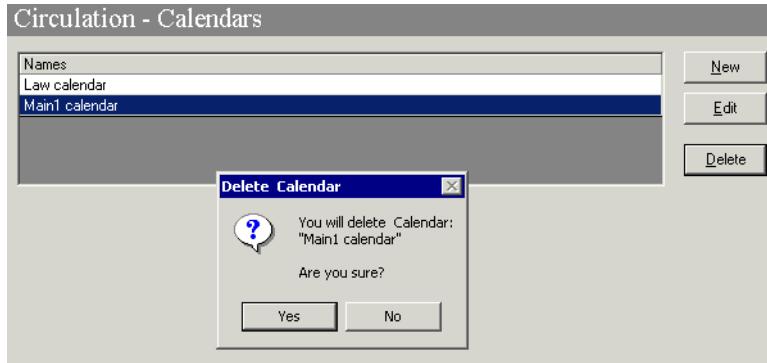
Use the following to delete a Circulation Calendar.

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.

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 5-25](#)).



---

**Figure 5-25. 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

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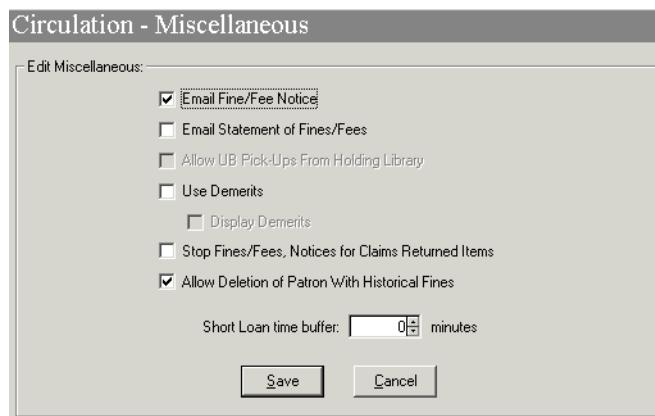
Operators linked to a Master security profile, where the **Circulation Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Circulation - Miscellaneous** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-23](#).

### Circulation - Miscellaneous Workspace

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[Figure 5-26](#) displays the **Circulation - Miscellaneous** workspace.

---



---

**Figure 5-26. 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	<p>When checked, this sends all Fine/Fee notices by e-mail, providing the patron has a valid e-mail address.</p> <p>Leave unchecked to print these notices.</p> <p><b>NOTE:</b> This setting applies to all Policy Groups.</p>	No	<p>Check box The default is unchecked.</p>
Email Statement of Fines/Fees	<p>When checked, this sends all Statements of Fines/Fees by e-mail, providing the patron has a valid e-mail address.</p> <p>Leave unchecked to print these notices.</p> <p><b>NOTE:</b> This setting applies to all Policy Groups.</p>	No	<p>Check box The default is unchecked.</p>
Allow UB Pick-Ups From Holding Library	<p>When checked, items will be paged at the Holding library.</p> <p>See the <i>Voyager Universal Borrowing User's Guide</i> for more information.</p>	No  Active for sites using Universal Borrowing.	<p>Check box The default is unchecked.</p>
Use Demerits	<p>When checked, the overdue penalty will be a demerit point, not a monetary fine.</p>	No   <b>CAUTION:</b> <i>Do not select this check box without first reviewing the Demerits documentation</i>  See the Voyager Circulation User's Guide for information about the Demerits feature.	<p>Check box The default is unchecked.</p>

---

**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

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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 5-27](#)).

---

The screenshot shows a dialog box titled "Circulation - Miscellaneous". The title bar has a dark grey background with white text. The main area is labeled "Edit Miscellaneous:" and contains several checkboxes. Most checkboxes are unchecked except for the first one. Below the checkboxes is a "Short Loan time buffer:" field with a numeric input box containing "0" and a dropdown menu showing "minutes". At the bottom are two buttons: "Save" and "Cancel".

<input checked="" type="checkbox"/>	Email Fine/Fee Notice
<input type="checkbox"/>	Email Statement of Fines/Fees
<input type="checkbox"/>	Allow UB Pick-Ups From Holding Library
<input type="checkbox"/>	Use Demerits
<input type="checkbox"/>	Display Demerits
<input type="checkbox"/>	Stop Fines/Fees, Notices for Claims Returned Items
<input checked="" type="checkbox"/>	Allow Deletion of Patron With Historical Fines

Short Loan time buffer:  minutes

**Save**   **Cancel**

**Figure 5-27. 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.

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## **Patron Groups**

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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 9-23](#).

## 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

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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 5-28](#)) lists the codes and names of any Patron Groups already defined.

---



Codes	Names
FAC	Faculty
GRAD	Graduate Student
ILL	Inter-Library Loan
Law	University Law Students
RESTRICTED	Restricted

New    Edit    Delete

---

Figure 5-28. Patron Groups Workspace (Top Half)

After clicking either the **New** or **Edit** button, the bottom half of the **Patron Group** workspace opens ([Figure 5-29](#)) 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 5-29](#).

The screenshot shows the Patron Group workspace with the 'Demerits' tab selected. It contains fields for Code, Name, and Display Name, along with checkboxes for 'Display OPAC Messages for charged items' and 'Demerits Apply'. There are dropdown menus for Max Demerits and Suspension Days, both set to 1.

**Figure 5-29.** Patron Group Tab Showing Demerits fields

[Figure 5-30](#) 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' set to 3, and a table for 'Global Charged items limit for these item types' with columns for Item Type, Current Limit, and New Limit. The table lists various item types with their current and new limits.

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 5-30.** 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
<b>Patron Groups Tab:</b>			
[Patron Group] Code	<p>The code given to the Patron Group. This code must be unique for each patron group.</p> <p><b>NOTE:</b> 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 <i>InProcess</i>, as it is used as an item status.</p>	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 <a href="#">Display OPAC Messages for charged items check box on page 5-43</a>  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  <b>NOTE:</b> Displays only if the <b>Use Demerits</b> check box in the <b>Circulation-Miscellaneous</b> 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.  <b>NOTE:</b> Displays if <b>Demerits Apply</b> 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 <b>Demerits Apply</b> is selected.	1-999 days
<b>Global Borrowed Item Limits Tab:</b>			
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 <a href="#">Defining Circulation Blocks on page 6-1</a> .	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
<b>Global charged items limit for these item types section</b>			
This section contains three columns:			
	<ul style="list-style-type: none"> <li>• Item Type</li> <li>• Current Limit</li> <li>• New Limit</li> </ul>		
See <a href="#">Defining Circulation Blocks on page 6-1</a> .			
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**

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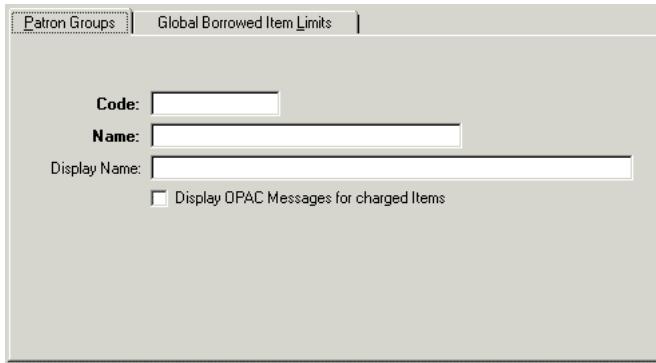
Use the following to create Patron Groups.

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 5-31](#)).



---

**Figure 5-31. 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 WebVoyáge.

[Figure 5-32](#) shows the **Patron Groups** tab with fields completed.

---

The dialog box shows the 'Patron Groups' tab selected. It contains the following fields:

Code:	ST
Name:	Staff
Display Name:	Staff
<input checked="" type="checkbox"/> Display OPAC Messages for charged items	

---

**Figure 5-32.** 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 5-33](#)).
- 

The dialog box shows the 'Global Borrowed Item Limits' tab selected. It contains the following settings:

<input checked="" type="checkbox"/> Charged items limit for all item types	50	
Global Charged items limit for these item types		
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 5-33.** 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 5-34](#)) 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 5-34. 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 5-35](#)).
- 

Circulation - Patron Groups	
Codes	Names
ILL	Inter-Library Loan
Law	University Law Students
RESTRICTED	Restricted
ST	Staff
Staff	Staff patron group

---

**Figure 5-35. Circulation - Patron Groups Workspace with group highlighted**

Result: The **Delete Patron Group** dialog box asks for confirmation of the deletion (see [Figure 5-36](#)).



---

**Figure 5-36. Listing after deleting the Patron Group**

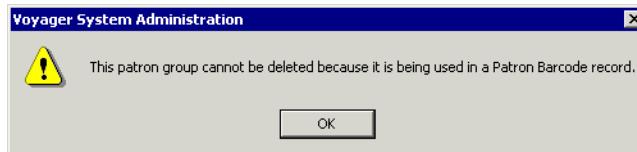
3. Click the **Yes** button if you want to delete the patron group.

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 5-37](#)).

---



---

**Figure 5-37. Patron Group cannot be deleted message**

---

---

## 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

---

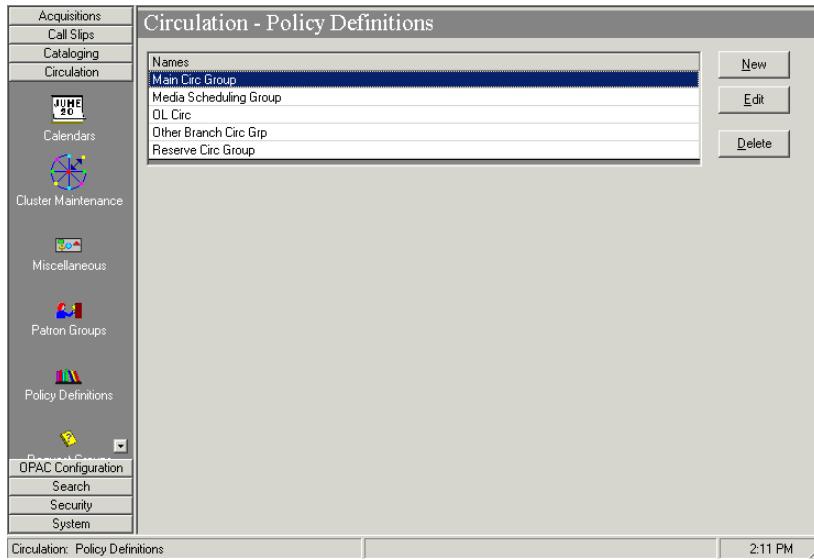
Operators linked to a Master security profile, where the **Circulation Policy Groups** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **Circulation - Policy Definitions** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-23](#).

---

## Circulation Policy Definition Workspace

---

The **Circulation - Policy Definitions** workspace, as shown in [Figure 5-38](#), 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 5-38. Circulation - Policy Definitions Workspace**

[Table 5-8](#) describes the fields and buttons that appear 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 <b>New Policy Definition:</b> screen appears in the work area as shown in <a href="#">Figure 5-39</a> .
Edit	When this button is clicked, the <b>Edit Policy Definition:</b> screen appears in the work area as shown in <a href="#">Figure 5-40</a> .
Delete	This button allows the administrator to remove a policy definition that is highlighted under the <b>Name:</b> column.

### The Policy Definition Screens (New and Edit)

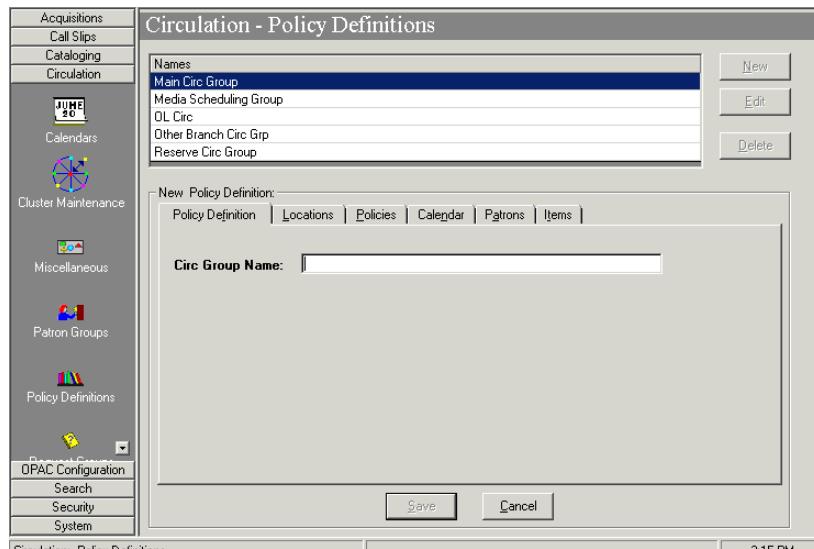
The **New Policy Definition:** screen (see [Figure 5-39](#)) and the **Edit Policy Definition:** screen (see [Figure 5-40](#)) allow the administrator to add or modify policy definitions by populating fields on the following tabs:

- Policy Definition
- Locations
- Policies
- Calendar
- Patrons
- Items
- Matrix
- Short Loan Matrix

**NOTE:**

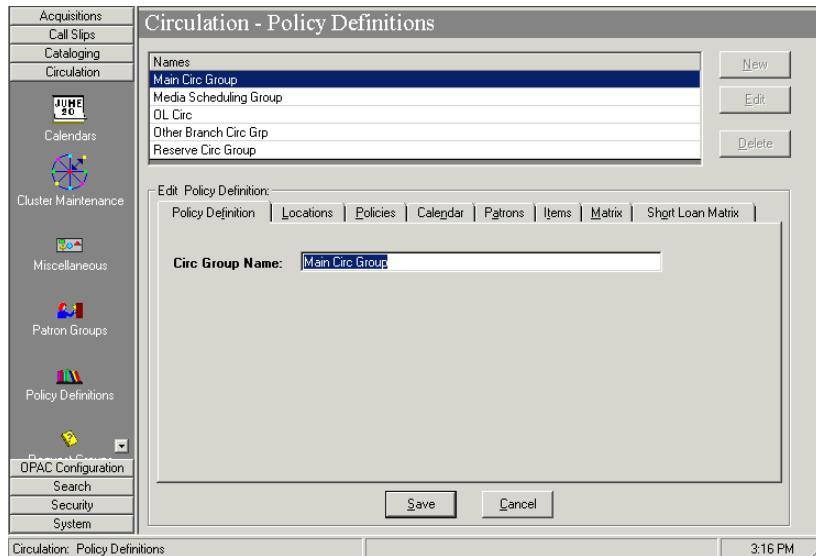
The **Matrix** and **Short Loan Matrix** tabs are not available from the **New Policy Definition:** screen. These tabs appear on the **Edit Policy Definition:** screen after the circulation policy group has been defined with the **New Policy Definition:** screen.

[Figure 5-39](#) shows the **New Policy Definition:** screen which adds circulation policy groups to the database.



**Figure 5-39.** New Policy Definition

[Figure 5-40](#) shows the **Edit Policy Definition:** screen which is used to edit circulation policy groups.



**Figure 5-40.** Edit Policy Definition

[Table 5-9](#) describes the buttons that appear on the **New Policy Definition:** screen and the **Edit Policy Definition:** screen.

**Table 5-9.** New/Edit Policy Definitions Screen 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 5-40](#), assigns a unique name to the circulation policy group.

[Table 5-10](#) describes the fields on the **Policy Definition** tab.

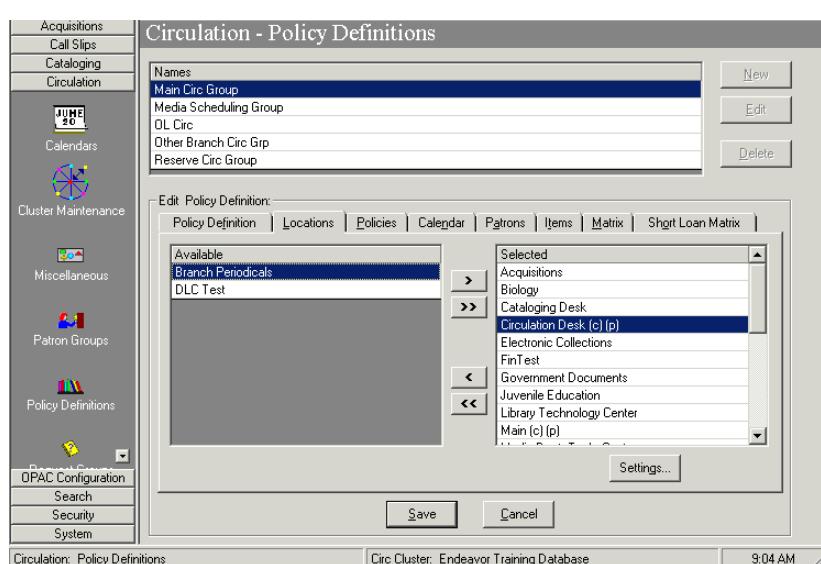
**Table 5-10. Policy Definition Tab Fields**

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 5-41](#) shows the **Locations** tab when the **Circulation Location** radio button is left unmarked.



**Figure 5-41. Locations Tab**

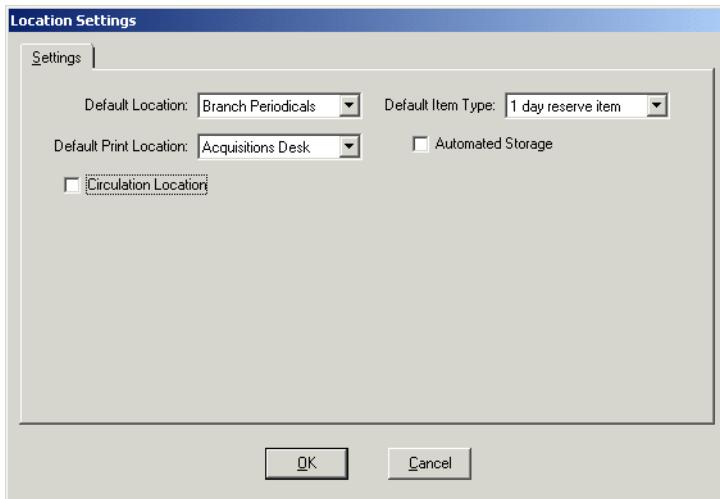
[Table 5-11](#) describes the **Location Settings** dialog box.

**Table 5-11. Locations Settings Dialog Box Fields**

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 Available list. Locations are defined in System Administration. <a href="#">Locations on page 10-38.</a>
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 <b>Locations Settings</b> dialog box.  This is only active if a location has been saved and then highlighted in the <b>Selected</b> column.	N/A	button
>	This button moves highlighted items from the <b>Available</b> column to the <b>Selected</b> column.	N/A	button
<	This button moves highlighted items from the <b>Selected</b> column to the <b>Available</b> column.	N/A	button
>>	This button moves all items from the <b>Available</b> column to the <b>Selected</b> column.	N/A	button
<<	This button moves all items from the <b>Selected</b> column to the <b>Available</b> column.	N/A	button

### Location Settings

The **Location Settings** dialog box appears as shown in [Figure 5-42](#) when the location isn't configured for circulation.



**Figure 5-42.** Location Settings Without Circulation Location

[Table 5-12](#) describes the **Location Settings** dialog box.

**Table 5-12.** Locations Settings Dialog Box Without Circulation Happening

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. <a href="#">Locations</a> on page 10-38.
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. <a href="#">Item Types</a> on page 10-33.

**Table 5-12. Locations Settings Dialog Box Without Circulation Happening**

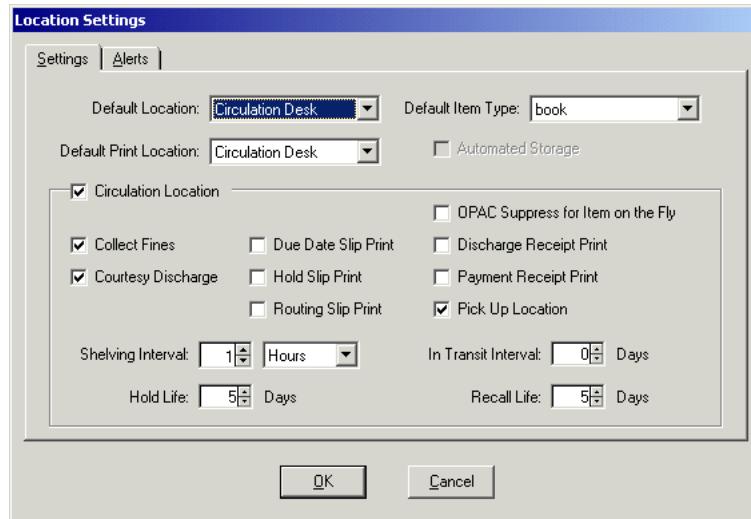
Name	Description	Required	Type and Range
Default Print Location	For all notices and reports, Voyager looks at the happening location in the Circulation Policy Group and sends the circulation desk information to the .inp file for the default print location (happening location).	No	Choose from the drop-down list populated by the print locations. Print Locations are defined in System Administration. <a href="#">Print Locations on page 10-82.</a>
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 (MSH). 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
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 <a href="#">Circulation Locations (Circulation Happening Locations)</a> .	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 5-43](#)).

**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 5-144](#).



**Figure 5-43.** 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**

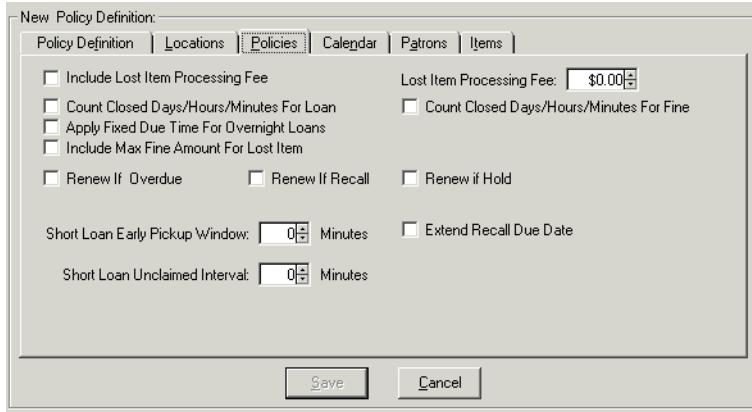
Name	Description	Required	Type and Range
Due Date Slip Print	When checked, the system automatically prints a Due Date slip according to the circumstances of the circulation transaction when it is performed by an operator at this circulation location unless the operator overrides through a Circulation 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	<p>When checked, this defines this location as a valid pickup location for requests made in WebVoyage.</p> <p>A (p) displays next to the location in the Selected Locations list when you select this check box as a circulation happening location.</p>	No The system allows a Circulation Policy Group to have no Pickup Locations.	Check box Default is unchecked.
Shelving Interval and unit field	<p>The number of days/hours/minutes it typically takes for an item discharged at the circulation location to be reshelfed.</p> <p>This interval determines when the system changes an item's status from Discharged (mm/dd/yyyy) to Not Charged.</p>	Yes	0-999 Default is 0. Enter 0 if everything discharged at this location is reshelfed immediately.
In Transit Interval	<p>The number of days it typically takes for an item to be routed either to or from the circulation location.</p> <p>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.</p> <p>Circulation batch job 22, Missing In Transit report, lists these items.</p> <p>See the <i>Voyager Reporter User's Guide</i> for information about Circjob 22.</p>	Yes	0-999 Default is 0. Enter 0 if you never route items to or from this location.
Hold Life	<p>The number of days the system keeps a hold request active before it cancels the unfilled request.</p> <p>This interval is added to the current date to generate the default date required for all hold requests.</p>	No	0-999 days Default is 0.
Recall Life	<p>The number of days the system keeps a recall request active before it cancels the unfilled request.</p> <p>This interval is added to the current date to generate the default date required for all recall requests.</p>	No	0-999 days Default is 0.

## Policies Tab

[Figure 5-44](#) shows the **Policies** tab of the **Policy Definitions** section.



**Figure 5-44. 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	Required	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.	No	Check box Default is unchecked.
Lost Item Processing Fee	Amount of money charged to process a lost item.	No	00.00 to 999.99

**Table 5-14. Check boxes and fields in the Policies Tab of the Circulation - Policy Definitions Workspace**

Name	Description	Required	Type and Range
Count Closed Days/Hours/Minutes for Loan	<p>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.</p> <p>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.</p> <p>See <a href="#">Calculating Loan Periods for Hourly and Minutely Loans</a> on <a href="#">page 5-16</a> for additional information.</p> <p>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.</p>	No	Check box 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.	No	Check box Default is unchecked.

**Table 5-14. Check boxes and fields in the Policies Tab of the Circulation - Policy Definitions Workspace**

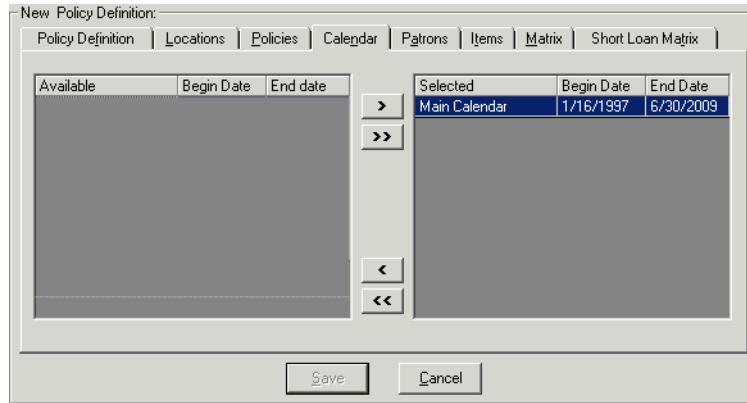
Name	Description	Required	Type and Range
Applied Fixed Due Time for Overnight Loans	<p>When checked, this enables the fixed due times and effective times that are set up in the associated Circulation Calendar.</p> <p>Fixed due times allow libraries to specify when an hour- or minute-loan item is due if charged out overnight, and the effective times for that due time to be applied.</p> <p><a href="#">Fixed Due Times on page 5-15.</a></p>	No	Check box Default is unchecked.
Include Max Fine Amount for Lost Item	<p>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.</p> <p>The amount is provided on the Settings tab <a href="#">Add - Circulation Policy Matrix Record Settings Dialog Box</a> on <a href="#">page 5-94</a>.</p>	No	Check box Default is unchecked.
Renew if Overdue	<p>When checked, if the patron can renew the item, then the patron will be able to renew it even if it is overdue.</p> <p>If not checked, the patron cannot renew an overdue item.</p>	No	Check box Default is unchecked.
Renew if Recall	<p>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.</p> <p>If not checked, the patron cannot renew an item if there is an active recall request.</p>	No	Check box Default is unchecked.

**Table 5-14. Check boxes and fields in the Policies Tab of the Circulation - Policy Definitions Workspace**

Name	Description	Required	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.	No	Check box  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.	No	0-999 minutes  The default is 0.
Extended 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.	No	Check box  The default is unchecked.
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.	No	0-999 minutes

## Calendar Tab

[Figure 5-45](#) shows the **Calendar** tab of the **Policy Definitions** section.

**Figure 5-45. 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. <a href="#">Circulation Calendars on page 5-11</a> .

**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 5-46](#) shows the **Patron** tab and the **Patron Rules** dialog box. This is where you provide the policies for each of the patron groups.

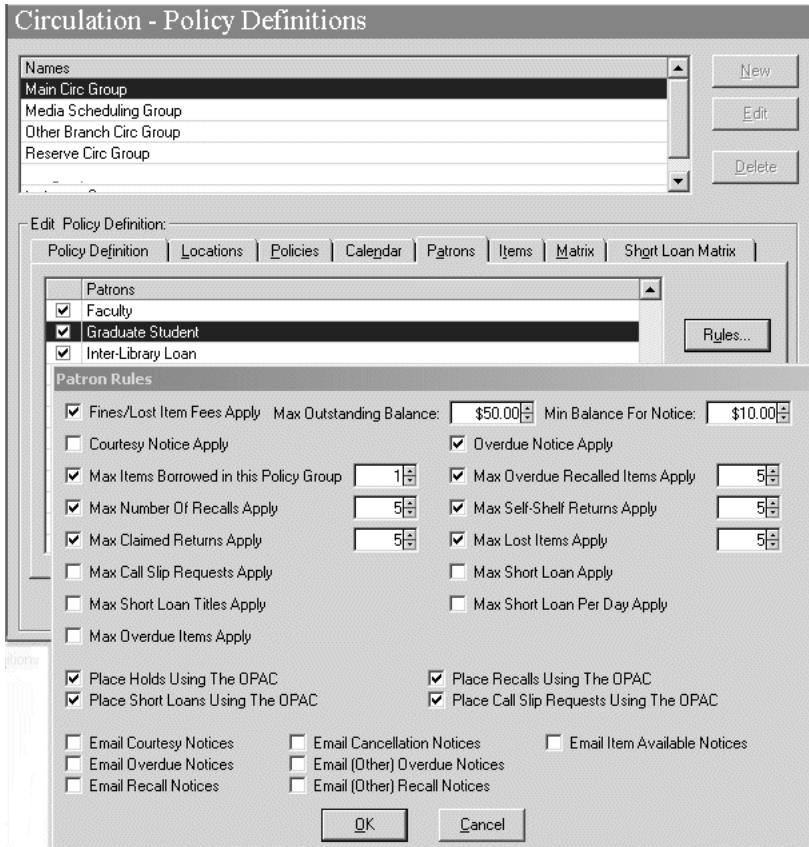
You must create a default (all) setting which will be used when no other specific settings have been defined. And, if all of your patron groups use these same settings, then simply defining the (all) settings is sufficient. Create specific patron group settings for those exceptions to the (all) settings.



#### **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.*

The limits defined here for patron groups are checked when a patron attempts to charge an item. If the limits are exceeded, then 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. See [Defining Circulation Blocks on page 6-1](#).



**Figure 5-46. Patrons Tab and the Patron Rules dialog box**

**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 that the **Patron Rules** dialog box was simply saved to the database with no information added.

[Table 5-16](#) describes the fields and check boxes in the **Patron Rules** dialog box.

**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.
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.  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.

**Table 5-16. Fields and check boxes on the Patron Rules dialog box**

Name	Description	Required	Type and Range
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.	1-999 If not selected, there is no limit
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 a placing 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-shelf 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.

**Table 5-16. Fields and check boxes on the Patron Rules dialog box**

Name	Description	Required	Type and Range
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.
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.

**Table 5-16. Fields and check boxes on the Patron Rules dialog box**

Name	Description	Required	Type and Range
Max[imum] Lost Items	<p>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.</p> <p>When a staff member adds the Lost Item status to an item, the system increments the lost item counter by one.</p> <p>If the limit is reached, this counter must be decreased manually; see the <i>Voyager Circulation User's Guide</i> for more information.</p>	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	<p>Check box</p> <p>The default is unchecked.</p>
Max[imum] Call Slip Requests	<p>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.</p> <p>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.</p> <p><b>NOTE:</b> 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.</p>	Yes, if Max Call Slip Requests Apply is checked.	<p>1-999</p> <p>Since this does count toward the Max Items Borrowed, the number for the Max Call Slip Requests should not exceed the Max Borrowed Items.</p>

**Table 5-16. Fields and check boxes on the Patron Rules dialog box**

Name	Description	Required	Type and Range
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
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 Item Apply	When checked, this blocks a patron if his or her overdue items have reached this number.	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] Overdue Item	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.
Place Holds Using the OPAC	When checked, patrons can place holds in WebVoyage.	No	Check box The default is unchecked.
Place Recalls Using the OPAC	When checked, patrons can place recalls in WebVoyage.	No	Check box The default is unchecked.
Place Short Loans Using the OPAC	When checked, patrons can place short loans in WebVoyage.	No	Check box The default is unchecked.
Place Call Slip Requests Using the OPAC	When checked, patrons can place call slip requests in WebVoyage.	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.

**Table 5-16. Fields and check boxes on the Patron Rules dialog box**

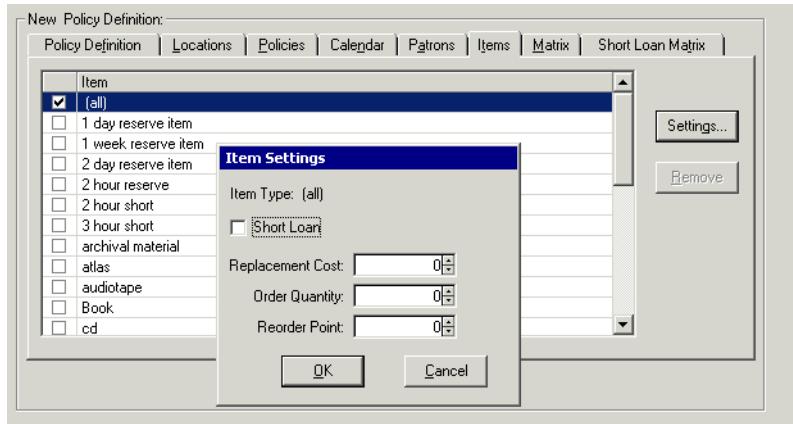
Name	Description	Required	Type and Range
Email (Other) Overdue Notices	When checked, send subsequent Overdue Notices by e-mail.  Patron record must contain an e-mail address.	No	Check box  The default is unchecked.
Email Recall Notices	When checked, send first Recall Notices by e-mail.  Patron record 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.

**NOTE:**

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 and Item Settings Dialog Box

[Figure 5-47](#) shows the **Items** tab and the **Item Settings** dialog box.



**Figure 5-47. Items Tab and Item Settings dialog box**

Use this tab to supply settings for Item types. Define short loan item types, provide replacement cost, and, for distribution items, provide the order quantity, and the reorder points.

**NOTE:**

This lost item replacement fee is used only if there is no specific price in the item record. 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 leave the item record blank 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, this replacement cost is used.

You must create a default (all) setting which will be used when no other specific settings have been defined. And, if all of your item types use these same settings, then simply defining the (all) settings is sufficient. Create specific item type settings for those exceptions to the (all) settings.

**NOTE:**

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. These settings may be the same as the all settings, different from the all settings, or that the **Item Settings** dialog box was simply saved to the database with no information added.

[Table 5-17](#) describes the fields in the **Item Settings** dialog box.

**Table 5-17. Check boxes and fields in the Items Settings dialog box**

Name	Description	Required	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.	No	Check box  The default is unchecked.
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.	No	0.00-99999.99  The default is 0.
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.	No	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.	No	0-9999  The default is 0.

**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.

## Circulation Policy Matrix

The Circulation Policy Matrix contains the specific Patron Group-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:

- Setting the Policies for the specific Patron Group-Item Type combination.
- Setting the Intervals for the specific Patron Group-Item Type combination.

### 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, then administrators do not need to create additional matrices. Create additional matrices 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 unchecked.

### Loan Periods and Recalled Items

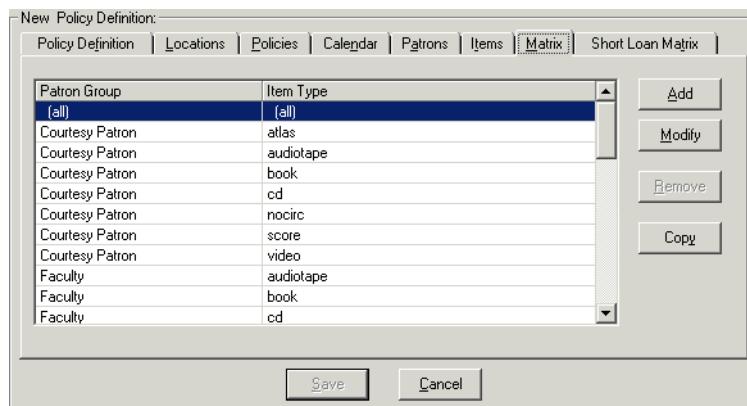
Loan Period is altered by the system when a recall is placed on an item. The loan period is set to end on the date specified in the Min Loan Period for Recalled Items field in the circulation matrix. If this is later than the original due date for the item, the loan period remains that of the original 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.

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. [Circulation - Calendars Workspace on page 5-11](#).

## Matrix Tab

Providing Circulation Policy Matrix Definitions is done on the **Matrix** tab of the **Circulation - Policy Definitions** workspace.

The **Matrix** tab, as shown in [Figure 5-48](#), lists the Patron Group-Item Type combinations.



**Figure 5-48. Matrix Tab**

[Table 5-18](#) describes the buttons and fields on the **Matrix** tab.

**Table 5-18. Matrix Tab**

Name	Description
Patron Group	The name of the Patron Group.
Item Type	The name of the Item Type.
Add	This button opens the <b>Add - Circulation Policy Matrix Record Settings</b> dialog box, which is used to add a new matrix to the database (see sections <a href="#">Add - Circulation Policy Matrix Record Settings Dialog Box</a> ).
Modify	This button opens the <b>Circulation Policy Matrix Record Settings</b> dialog box, which is used to modify an existing matrix in the database (see sections <a href="#">Circulation Policy Matrix Record Settings Dialog Box - Settings Tab</a> and <a href="#">Circulation Policy Matrix Record Settings Dialog Box - Intervals Tab</a> ).
Remove	This button removes the highlighted matrix.

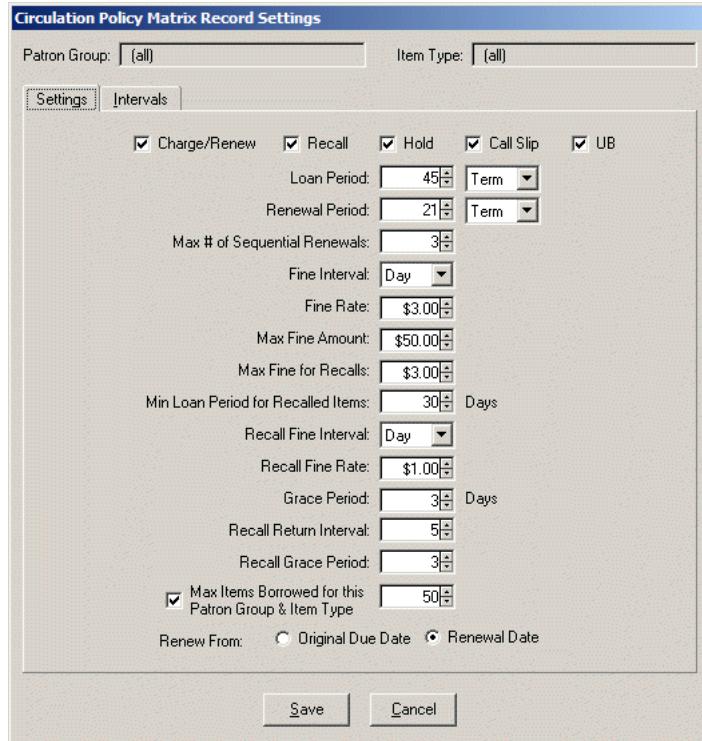
**Table 5-18. Matrix Tab**

Name	Description
Copy	This button opens the <b>Copy - Circulation Policy Matrix Record Settings</b> dialog box, which is used to add a new matrix to the database from an existing matrix (see sections <a href="#">Copy - Circulation Policy Matrix Record Settings Dialog Box</a> ).

**Circulation Policy Matrix Record Settings Dialog Box - Settings Tab**

The **Circulation Policy Matrix Record Settings** dialog box modifies the circulation transaction information for specific Patron Group-Item Type matrices. 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 5-49](#).

**Figure 5-49. Circulation Policy Matrix Record Settings dialog box, Settings Tab**

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[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 in the Circulation - Patron Group workspace, see <a href="#">Patron Groups</a> 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 <a href="#">Item Types</a> on page 10-33.
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.  <b>NOTE:</b> 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.

**Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab**

Name	Description	Required	Type and Range
UB permission	When checked, remote patrons that are mapped into this group may place a UB request for items of this type.  <b>NOTE:</b> 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
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 groups active Circulation calendar. See <a href="#">Circulation Calendars</a> on page 5-11.
Renewal period	Length of loan when the loan is renewed.  Does not apply to indefinite loans.	No	0-999

**Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab**

Name	Description	Required	Type and Range
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.
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.

**Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab**

Name	Description	Required	Type and Range
Fine Rate or Demerits Rate if 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.
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
Max[imum] Fine for Recalls or Max[imum] Recall Demerits	The maximum amount charged to the patron for any one overdue recall situation.  Leave blank 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	<p>The minimum length of time that the patron may keep an item that has been recalled.</p> <p>This period is used when recalculating the due date for a recalled item.</p> <p>If Loan Period is in days, this period defaults to days.</p> <p>If Loan Period is in hours or minutes, this period defaults to hours or minutes.</p> <p>If Loan Period is <code>indef</code> or <code>term</code>, this period defaults to days.</p>	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	<p>If Minimum Loan Period is days or minutes, Recall Fine Interval defaults to days or minutes.</p> <p>If Minimum Loan Period is hours, Recall Fine Interval may be hours or minutes.</p> <p>If Minimum Loan Period for Recalled Item is <code>indef</code> or <code>term</code>, Recall Fine Interval defaults to days.</p>	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	<p>The amount charged for each day/hour/minute (recall fine interval) that the recalled item is overdue.</p> <p>The fine is applied to a patron's record when the overdue recalled item is discharged.</p> <p>If the total amount of the fine exceeds the designated Maximum Recall Fine Amount, the Maximum Recall Fine Amount is applied instead.</p>	No	<p>00.00-999.99</p> <p>Use 00.00 for any Patron Group/Item Type combination where you do not impose overdue recall fines.</p>

**Table 5-19. Circulation Policy Matrix Record Settings Dialog Box - Settings Tab**

Name	Description	Required	Type and Range
Grace Period	<p>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.</p> <p>The system uses Grace Periods for this purpose only.</p> <p>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.</p> <p>If Loan Period is days, hours, or minutes, the Grace Period defaults to the same interval.</p> <p>If Loan Period is Term, the Grace Period defaults to days.</p> <p>If Loan Period is Indefinite the Grace Period does not apply.</p>	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	<p>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.</p> <p>The system uses Recall Grace Periods for this purpose only.</p> <p>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.</p> <p>If Minimum Loan Period for Recalled Items is days, hours, or minutes, the Recall Grace Period defaults to the same interval.</p> <p>If Minimum Loan Period for Recalled Items is indef or term, the Recall Grace Period defaults to days.</p>		<p>0-999 0 means no Recall Grace Period applies.</p>
Renew From: Original Due Date Renewal Date	<p>If the Original Due Date radio button is selected the item will be renewed from its original due date.</p> <p>If the Renewal Date radio button is selected the item will be renewed from the date that the renewal was placed.</p> <p>Does not apply if renewal is term.</p>	<p>Use the original due date to allow patrons the maximum loan time.</p>	<p>Radio button The default is Renewal Date.</p>

**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.  <b>NOTE:</b> Available even if the policy group level setting is No limit.  See <a href="#">Defining Circulation Blocks on page 6-1</a> .	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 Max[imum] number of items borrowed check box is checked.	Numeric field. 1 - 9999

**Circulation Policy Matrix Record Settings Dialog Box - Intervals Tab**

The **Intervals** tab ([Figure 5-50](#)) 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.

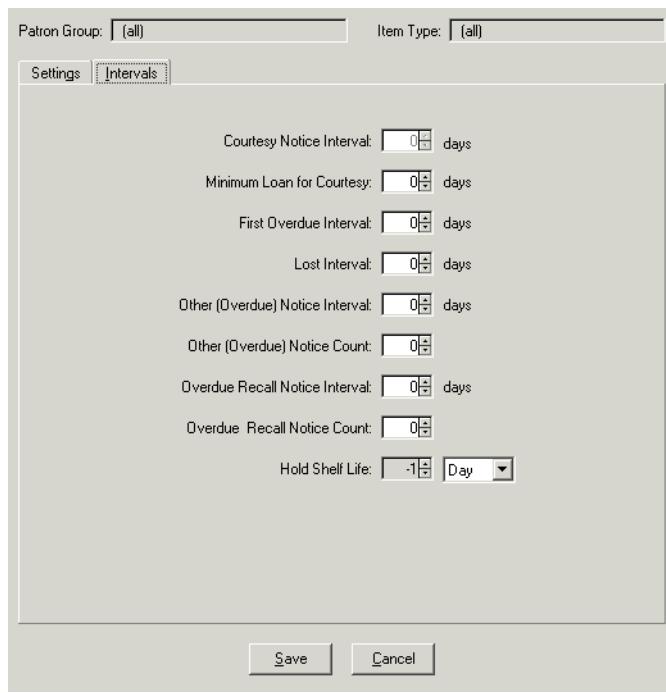


Figure 5-50. Circulation Policy Matrix Record Settings Dialog Box, Intervals Tab

[Table 5-20](#) describes the buttons and fields on the **Intervals** tab of **Circulation Policy Matrix Record Settings** dialog box.

**Table 5-20. Circulation Policy Matrix Record Settings Dialog Box - 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 <a href="#">Patrons Tab and Patron Rules Dialog Box on page 5-66</a> .	0-999  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 <a href="#">Matrix Tab on page 5-78</a> ) 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 <a href="#">Patrons Tab and Patron Rules Dialog Box on page 5-66</a> .	0-999  Default is 0  If you enter 0, the first overdue notice will be produced when circ-job 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  Default is 0.
Overdue Recall Notice Count	The number of overdue recall notices to be sent.	Yes	0-999  Default is 0.

**Table 5-20. Circulation Policy Matrix Record Settings Dialog Box - Intervals Tab**

Name	Description	Required	Type and Range
Minimum Loan for Courtesy	<p>The minimum loan for a courtesy equals the minimum loan length for an item to activate courtesy notices.</p> <p>If the difference between the charge date and the current date is greater than this minimum, the item is eligible for a notice.</p>	<p>Yes, if the Courtesy Notice Apply check box is checked in the Circulation Policy Definitions, Patron Rules dialog box.</p> <p>See <a href="#">Patrons Tab and Patron Rules Dialog Box on page 5-66</a>.</p>	<p>0-999 Default is 0 If you enter 0, then all loans are eligible for a notice (except for indefinite loans).</p> <p>However, if the Courtesy Notice Interval is 0, then no notice is sent, regardless of the value in this field.</p>
Lost Interval	<p>The number of days after the due date/time that pass before processing the item as lost.</p> <p>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 <a href="#">Policies Tab on page 5-61</a>.</p> <p>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).</p>	Yes	0-999 Default is 0.

**Table 5-20. Circulation Policy Matrix Record Settings Dialog Box - 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  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  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.

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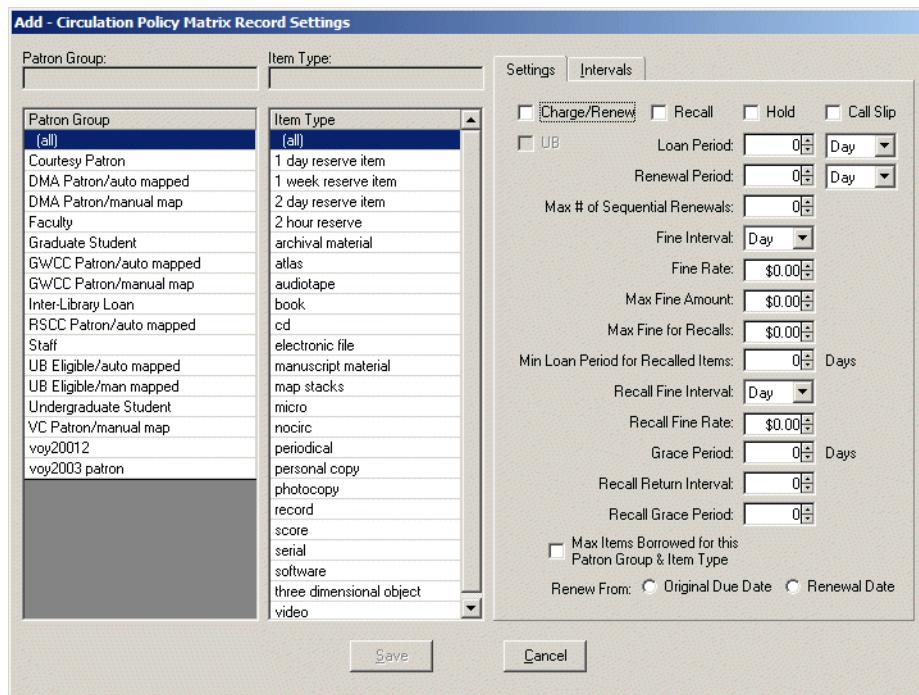
**Table 5-20. Circulation Policy Matrix Record Settings Dialog Box - Intervals Tab**

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  Default is 0
Hold Shelf Life unit	Unit used to define and calculate the hold shelf life.	No	Minute, Hour and Day.  Default is Day

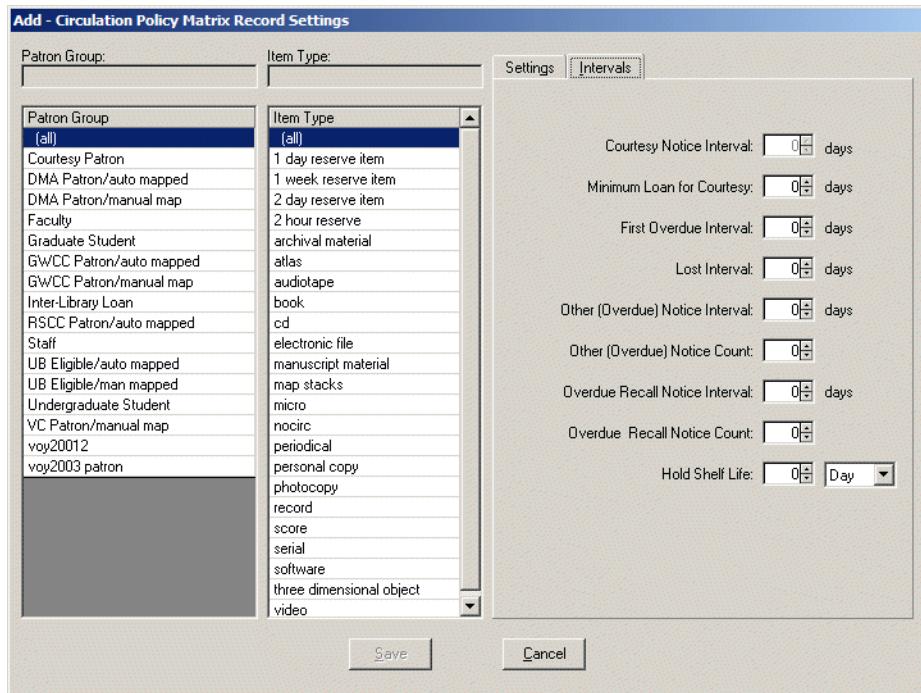
#### Add - Circulation Policy Matrix Record Settings Dialog Box

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 5-51](#), and the **Intervals** tab is shown in [Figure 5-52](#).



**Figure 5-51. Add - Circulation Policy Matrix Record Settings dialog box, Settings Tab**



**Figure 5-52. 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 <a href="#">Patron Groups</a> 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 <a href="#">Patron Groups</a> 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 <a href="#">Circulation Policy Matrix Record Settings Dialog Box - Settings Tab</a> on page 5-79.		tab
Intervals	This tab defines the matrix intervals. See <a href="#">Circulation Policy Matrix Record Settings Dialog Box - Intervals Tab</a> on page 5-89.		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

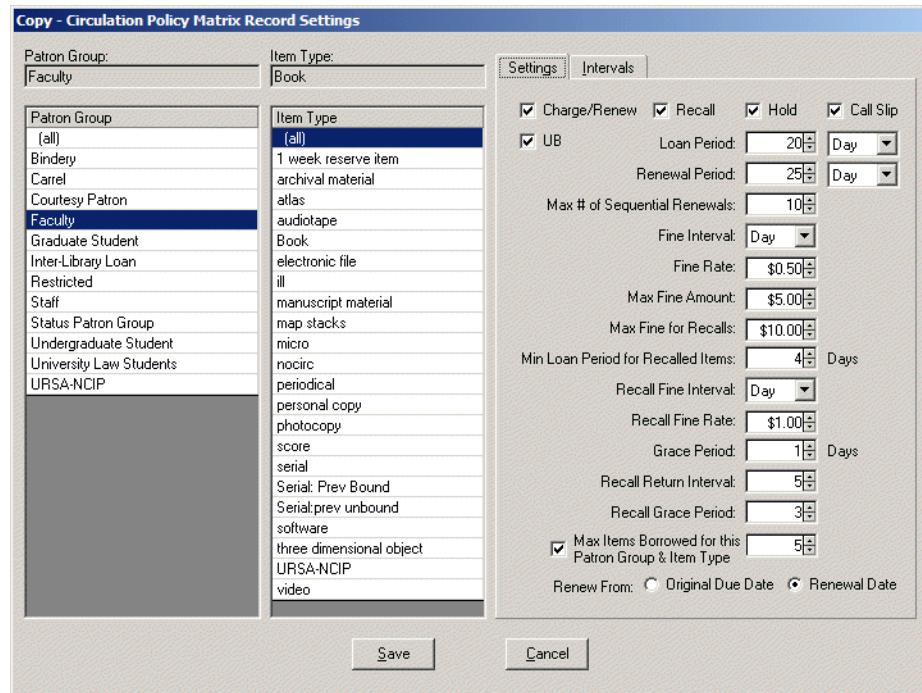
**NOTE:**

The **Patron Group - Item Type** pairing must be unique per policy group.

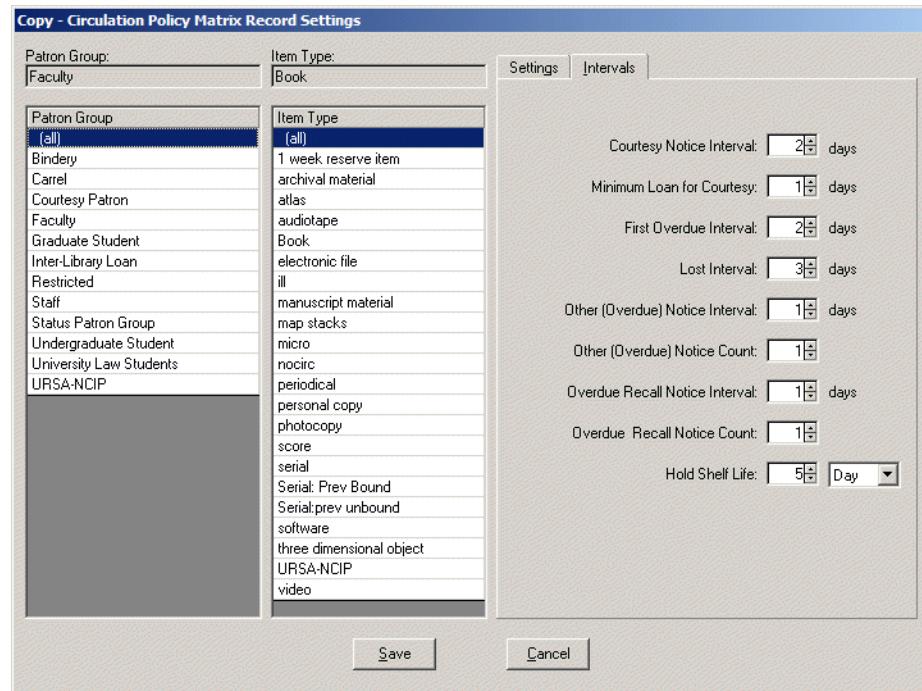
**Copy - Circulation Policy Matrix Record Settings Dialog Box**

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 5-53](#), and the **Intervals** tab is shown in [Figure 5-54](#).



**Figure 5-53.** Copy - Circulation Policy Matrix Record Settings dialog box, Settings Tab



**Figure 5-54.** 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 <a href="#">Patron Groups</a> on page 5-38.	Yes	list of patron groups

---

**Table 5-22. Copy - Circulation Policy Matrix Record Settings Dialog Box**

Name	Description	Required	Type and Range
Item Type column	The list of available item types. These types are defined in the System - Item Types workspace; see <a href="#">Patron Groups</a> on page 5-38.	Yes	list of item types
Settings	This tab defines the matrix settings. See <a href="#">Circulation Policy Matrix Record Settings Dialog Box - Settings Tab</a> on page 5-79.		tab
Intervals	This tab defines the matrix intervals. See <a href="#">Circulation Policy Matrix Record Settings Dialog Box - Intervals Tab</a> on page 5-89.		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.

## Circulation Short Loan Policy Matrix

The Circulation Short Loan Policy Matrix contains the specific Patron Group-Item Type combinations that govern a circulation transactions for short loan items only.

Creating a Circulation Short Loan Policy Matrix involves the following:

- Setting the Policies for the specific Patron Group-Item Type combination.
- Setting the Intervals for the specific Patron Group-Item Type combination.

### Short Loan Matrix Tab

Providing Circulation Short Loan Policy Matrix Definitions is done on the **Short Loan Matrix** tab of the **Circulation - Policy Definitions** workspace in the System Administration module. [Figure 5-55](#) shows the **Short Loan Matrix** tab.

Patron Group	Item Type
Faculty	1 day reserve item
Faculty	2 hour reserve
Faculty	2 hour short
Faculty	3 hour short
Faculty	cd
Graduate Student	1 day reserve item
Graduate Student	2 hour reserve
Graduate Student	2 hour short
Graduate Student	3 hour short
Graduate Student	cd
Graduate Student	record

**Figure 5-55. Short Loan Matrix Tab**

The **Short Loan Matrix** tab lists the Patron Group-Item Type combinations.

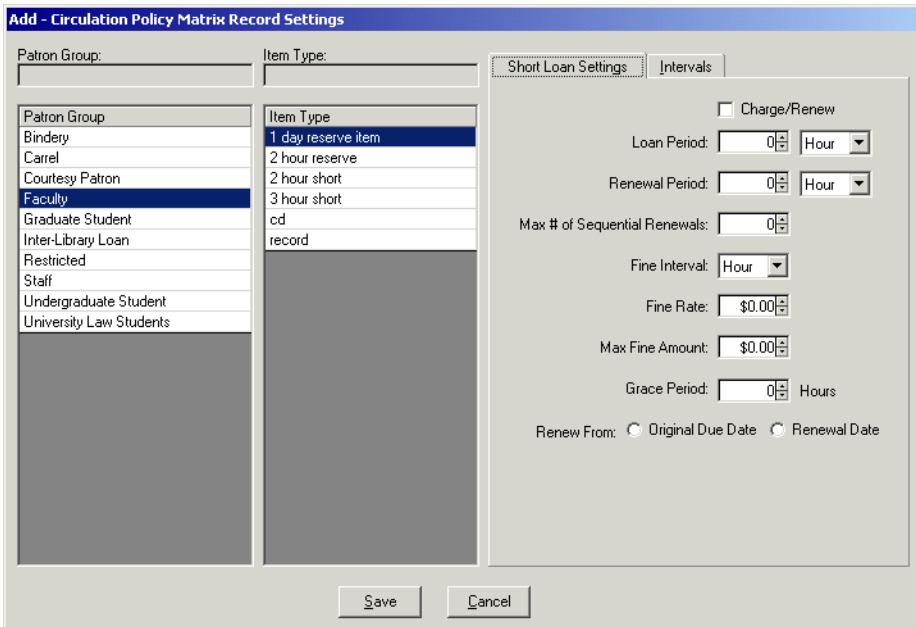
[Table 5-23](#) describes the **Short Loan Matrix** tab.

**Table 5-23. Short Loan Matrix Tab**

Name	Description
Patron Group column	Name of the Patron Group.
Item Type	Name of the Item Type.
Add button	When clicked, the <b>Add - Circulation Policy Matrix Record Settings</b> dialog box opens.
Modify button	When clicked, this opens the <b>Settings</b> and <b>Intervals</b> tab of the selected patron group-item type matrix.
Remove button	When clicked, this removes the selected matrix.
Copy button	When clicked, this copies the selected matrix.

#### **Add - Circulation Policy Matrix Record Settings (for Short Loans) dialog box - Settings Tab**

The **Add - Circulation Policy Matrix Record Settings** (for Short Loans) dialog box is the place where you define the circulation transaction information for specific Patron Group-Item Type matrices (see [Figure 5-56](#)). 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 **Short Loan Settings** tab and the **Intervals** tab.



**Figure 5-56. Add - Circulation Policy Matrix Record Settings (for Short Loans) dialog box with Settings Tab open**

There is no (all)/(all) matrix for short loans. Also, holds, recalls, and call slips for short loans are not allowed.

[Table 5-24](#) describes the **Add - Circulation Policy Matrix Record Settings** (for Short Loans) dialog box.

**Table 5-24. Fields in the Add - Circulation Policy Matrix Record Settings dialog box**

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 in the Circulation - Patron Group workspace, see <a href="#">Patron Groups</a> on page 5-38.
Item Type column	The available Item Types are listed in this column.	Yes	These Item Types were defined in the System Administration module.

**Table 5-24. Fields in the Add - Circulation Policy Matrix Record Settings dialog box**

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.	No	Check box  Default is unchecked.
Loan Period	Length of the loan.	No	Numeric.  1-999 for minute.  1-24 for hour.
Loan period unit	Unit used to define and calculate the loan period.	No	Minute, Hour.
Renewal period	Length of loan when the loan is renewed.	No	Numeric.  1-999 for minute.  1-24 for hour.
Renewal period unit	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 (but if hours is selected, 24 is the maximum value).  Renewal period information is not applicable if Maximum Number of Sequential Renewals is 0.	No	Minute, Hour.
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.

**Table 5-24. Fields in the Add - Circulation Policy Matrix Record Settings dialog box**

Name	Description	Required	Type and Range
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.	Yes	Minute, Hour.
Fine Rate or Demerits Rate if use Demerits	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.	No	0.00-999.99  Use 00.00 for any Patron Group/Item Type combination where you do not impose overdue fines.
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

**Table 5-24. Fields in the Add - Circulation Policy Matrix Record Settings dialog box**

Name	Description	Required	Type and Range
Grace Period	<p>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.</p> <p>The system uses Grace Periods for this purpose only.</p> <p>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.</p> <p>If Loan Period is hours, or minutes, the Grace Period defaults to the same interval.</p> <p>If Loan Period is Term, the Grace Period defaults to days</p>	No	0-999 0 means no Grace Period applies.
Renew From: Original Due Date Renewal Date	<p>If the Original Due Date radio button is selected, the item will be renewed from its original due date.</p> <p>If the Renewal Date radio button is selected, the item will be renewed from the date that the renewal was placed.</p>	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.

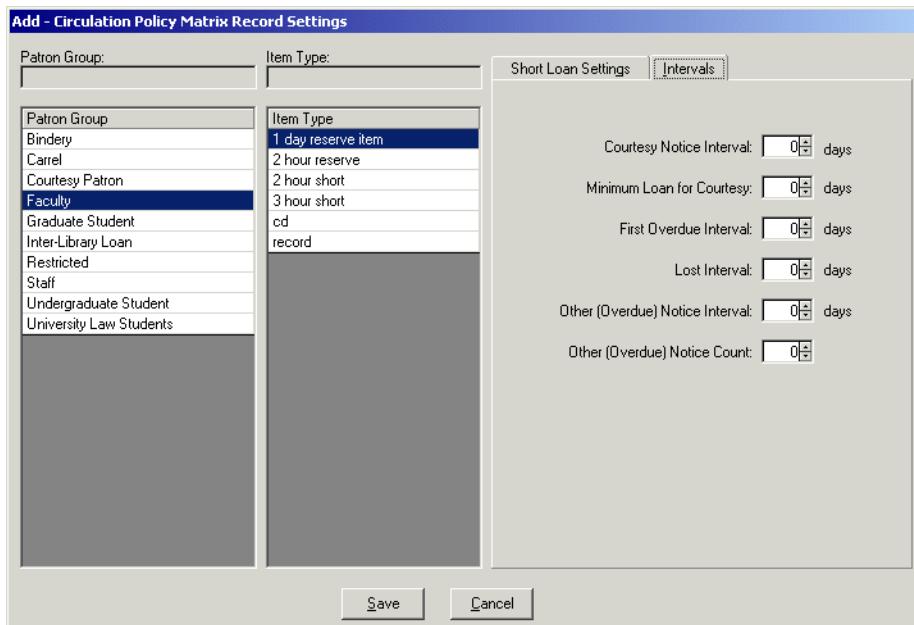
---

### Add - Circulation Policy Matrix Record Settings (for Short Loans) dialog box - Intervals Tab

The **Intervals** tab ([Figure 5-57](#)) 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.

---



**Figure 5-57.** Add - Circulation Policy Matrix Record Settings (for Short Loans) dialog box with Intervals Tab open

[Table 5-25](#) describes the **Intervals** tab of the **Add - Circulation Policy Matrix Record Settings** dialog box.

**Table 5-25. Fields in the Interval 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 <a href="#">Patrons Tab and Patron Rules Dialog Box on page 5-66</a> .	0-999  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 <a href="#">Matrix Tab on page 5-78</a> ) 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 <a href="#">Patrons Tab and Patron Rules Dialog Box on page 5-66</a> .	0-999  Default is 0.  If you enter 0, the first overdue notice will be produced when circ-job 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  Default is 0.

**Table 5-25. Fields in the Interval Tab**

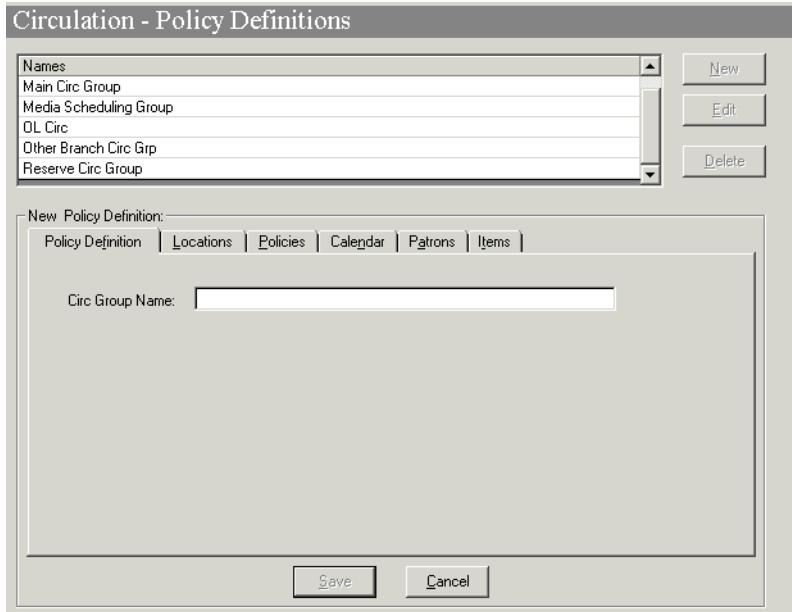
Name	Description	Required	Type and Range
Minimum Loan for Courtesy	<p>The minimum loan for a courtesy equals the minimum loan length for an item to activate courtesy notices.</p> <p>If the difference between the charge date and the current date is greater than this minimum, the item is eligible for a notice.</p> <p>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.</p>	<p>Yes, if the Courtesy Notice Apply check box is checked in the Circulation Policy Definitions, Patron Rules dialog box.</p> <p>See <a href="#">Patrons Tab and Patron Rules Dialog Box on page 5-66</a>.</p>	<p>0-999 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.</p>

**Table 5-25. Fields in the Interval Tab**

Name	Description	Required	Type and Range
Lost Interval	<p>The number of days after the due date/time that pass before processing the item as lost.</p> <p>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 <a href="#">Policies Tab on page 5-61</a>.</p> <p>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).</p>	Yes	0-999 Default is 0.
Other (Overdue) Notice Interval	<p>The number of days to pass before producing each subsequent overdue notice.</p> <p>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).</p>	Yes	0-999 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.

### Creating Circulation Policy Groups

[Procedure 5-10, Creating a Circulation Policy Group - Policy Definition Tab](#), on page [5-111](#) through [Procedure 5-18, Creating a Circulation Policy Group - Short Loan Matrix Tab](#), on page [5-128](#) provide instructions on completing each tab of the **Circulation - Policy Definitions** workspace (see [Figure 5-58](#)).



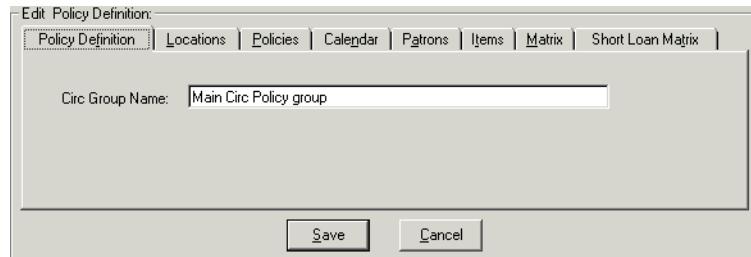
**Figure 5-58. Circulation - Policy Definitions Workspace**

**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 5-59](#)).



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**Figure 5-59. Edit Policy Definition section of the Circulation - Policy Definition Workspace**



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**Procedure 5-10. Creating a Circulation Policy Group - Policy Definition Tab**

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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 5-60](#)).

---

---

**Circulation - Policy Definitions**

Names	<input type="button" value="New"/>
Main Circ Group	<input type="button" value="Edit"/>
Media Scheduling Group	<input type="button" value="Delete"/>
OL Circ	
Other Branch Circ Grp	
Reserve Circ Group	

New Policy Definition:

Policy Definition	<input type="button" value="Locations"/>	<input type="button" value="Policies"/>	<input type="button" value="Calendar"/>	<input type="button" value="Patrons"/>	<input type="button" value="Items"/>
Circ Group Name:	<input type="text"/>				
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

---

**Figure 5-60. Policy Definition Tab**

3. Enter the name of the Circulation Policy Group in the **Circ Group Name** field (see [Figure 5-61](#)).
- 

New Policy Definition:

Policy Definition	<input type="button" value="Locations"/>	<input type="button" value="Policies"/>	<input type="button" value="Calendar"/>	<input type="button" value="Patrons"/>	<input type="button" value="Items"/>	<input type="button" value="Matrix"/>	<input type="button" value="Short Loan Matrix"/>
Circ Group Name:	<input type="text" value="Law Circ Group"/>						
<input type="button" value="Save"/> <input type="button" value="Cancel"/>							

**Figure 5-61. Policy Definition Tab with Circulation Policy Group named**

4. Click on the **Locations** tab to continue to define this Circulation Policy Group (see [Procedure 5-11, Creating a Circulation Policy Group - Locations Tab](#), on page [5-113](#)).
- 



#### Procedure 5-11. Creating a Circulation Policy Group - Locations Tab

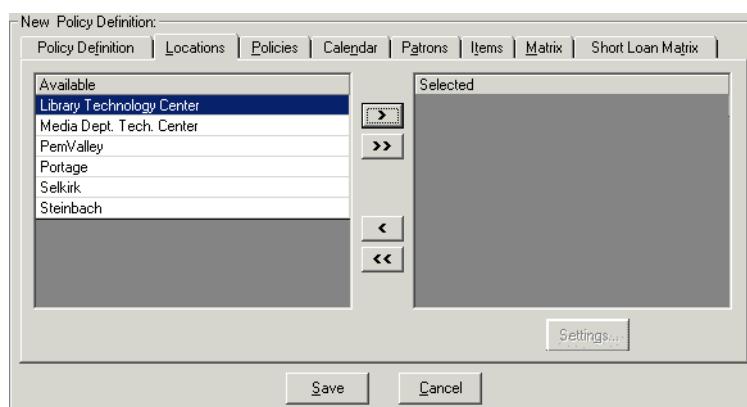
---

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 5-62](#)).
- 



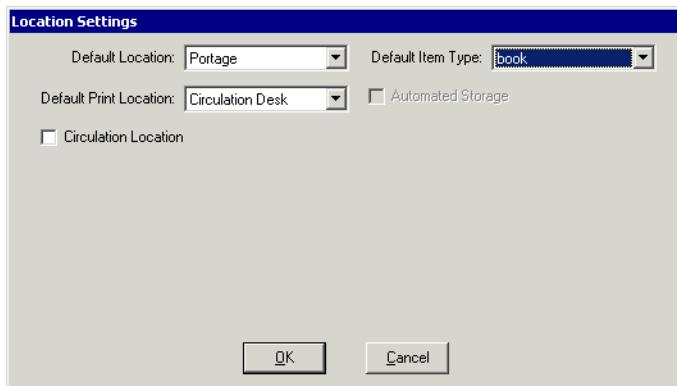
---

**Figure 5-62. 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 5-63](#))

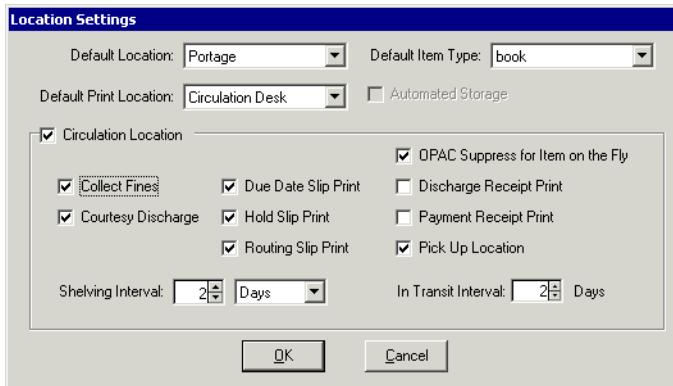
---



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**Figure 5-63.** 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 5-64](#)).



---

**Figure 5-64. Locations Settings dialog box with Circulation happening location defined**

Result: The location selected is now a circulation happening location.

6. Click on the **Policies** tab to continue to define this Circulation Policy Group (see [Procedure 5-13, Creating a Circulation Policy Group - Policies Tab](#), on page [5-118](#).
- 



### Procedure 5-12. Configuring Circulation Alerts

---

Use the following to configure circulation alerts.

1. Access the **Circulation - Policy Definitions** workspace.
  - a. Click **Circulation** in the listbar.
  - b. Click the **Policy Definitions** button in the Circulation listbar.

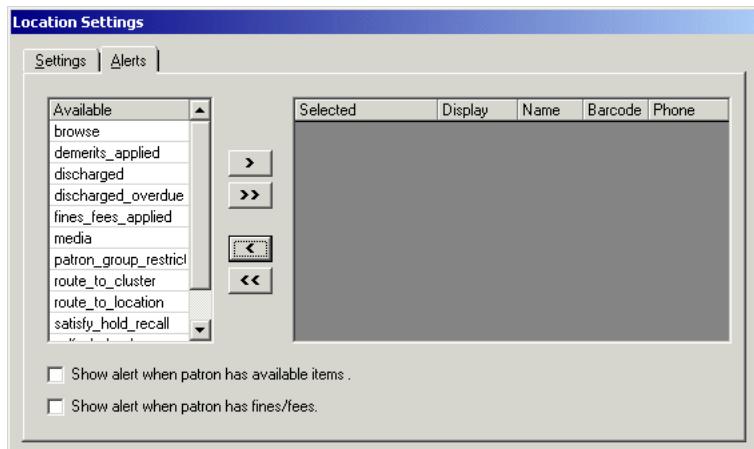
Result: The **Circulation - Policy Definitions** workspace opens.

2. Select the circulation happening location for which you want to configure circulation alerts and click the **Settings** button.

Result: The **Location Settings** dialog box opens.

3. Click the **Alerts** tab.

Result: The **Alerts** tab opens (see [Figure 5-65](#)).



**Figure 5-65.** Alerts Tab

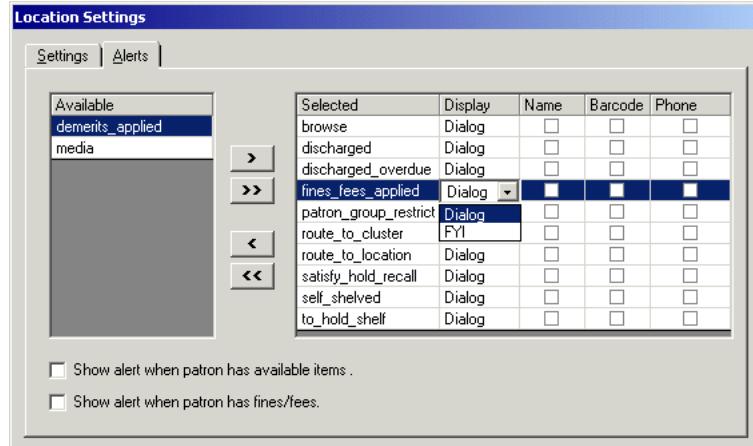
4. Select the conditions for which you want to provide a circulation alert from the **Available** list and click the **>** button.

**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 5-66](#)).

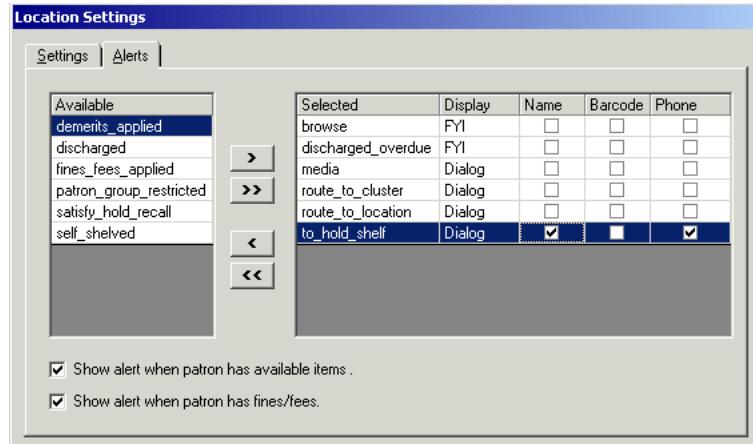


**Figure 5-66.** Display method drop-down menu

Result: The method of the alert is defined for the selected condition.

**OPTIONAL:**

6. 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 5-67](#)).
- 



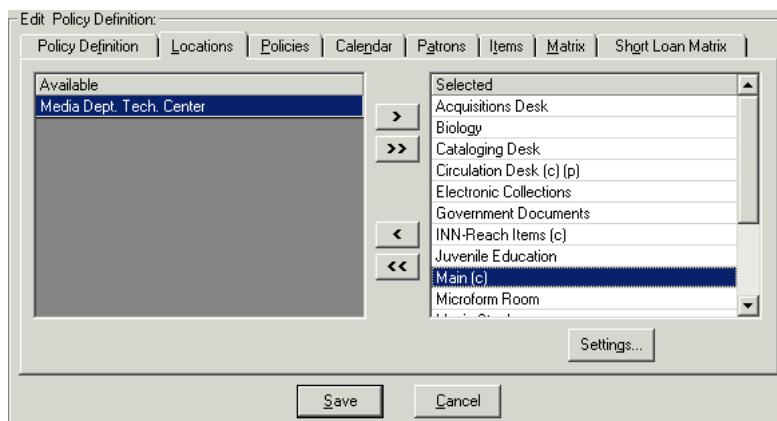
**Figure 5-67.** Defining patron information to display

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 5-68](#)).

---



---

**Figure 5-68. 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 5-13. Creating a Circulation Policy Group - Policies Tab**

---

Use the following to define the Policies for a Circulation Policy Group.

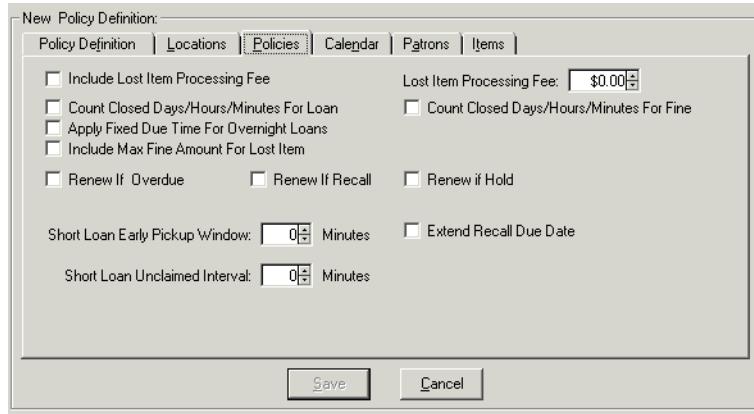
1. Access the **Circulation - Policy Definitions** workspace.
  - a. Click **Circulation** in the listbar.
  - b. Click the **Policy Definitions** button in the Circulation listbar.

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 5-69](#)).

---



**Figure 5-69. Policies Tab with features enabled**

3. Click on the **Calendars** tab to continue to define this Circulation Policy Group (see [Procedure 5-14, Creating a Circulation Policy Group - Calendars Tab](#), on page [5-119](#)).
- 



#### **Procedure 5-14. Creating a Circulation Policy Group - Calendars Tab**

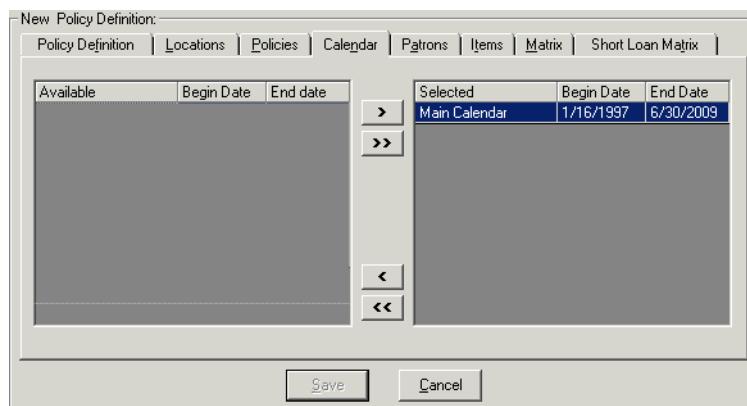
---

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 5-70](#)).



**Figure 5-70. Calendar Tab with a calendar selected**

4. Click on the **Patrons** tab to continue to define this Circulation Policy Group (see [Procedure 5-15, Creating a Circulation Policy Group - Patrons Tab](#), on page [5-120](#)).



#### **Procedure 5-15. Creating a Circulation Policy Group - Patrons Tab**

Use the following to define the Patrons associated with the Circulation Policy Group.

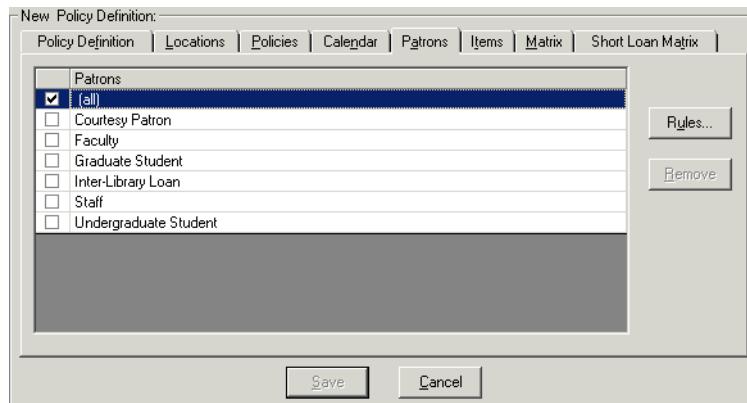
1. Access the **Circulation - Policy Definitions** workspace.
  - a. Click **Circulation** in the listbar.
  - b. Click the **Policy Definitions** button in the Circulation listbar.

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 5-71](#)).

---

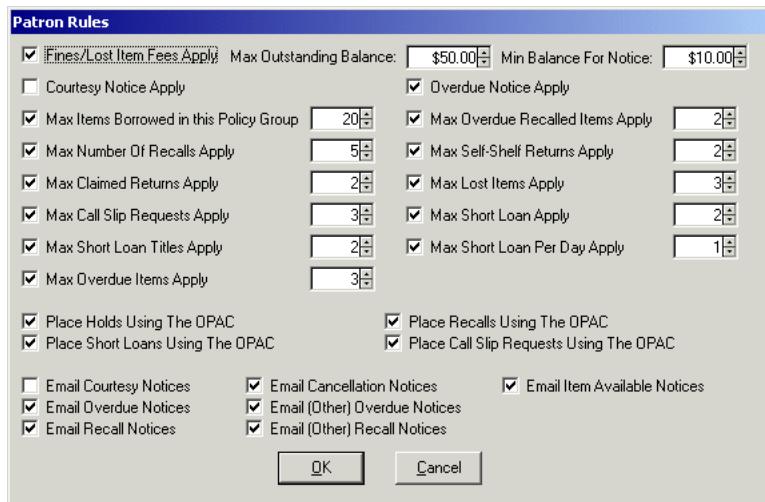


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**Figure 5-71. Patrons Tab with list of Patron Groups**

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 5-72](#)).

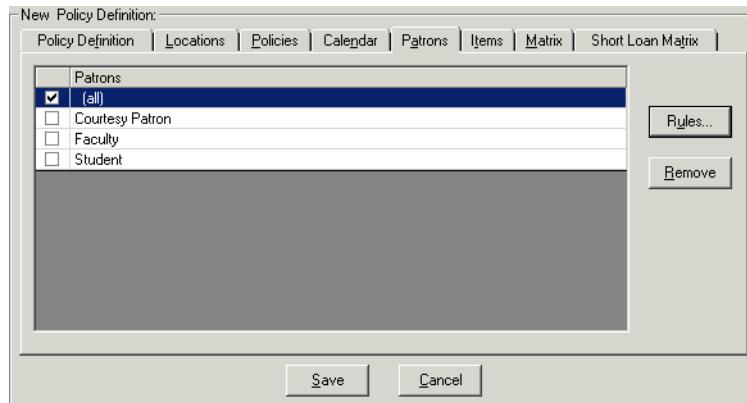


**Figure 5-72. Patron Rules dialog box with features enabled**

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 5-73](#)).

Repeat this for any Patron Group that you want to use settings other than the (all) settings.



**Figure 5-73. Patrons Tab with list of Patron Groups**

**NOTE:**

The check in the check box next to the name of the Patron Group in [Figure 5-73](#) 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 5-16, Creating a Circulation Policy Group - Items Tab](#), on page 5-123).



### Procedure 5-16. Creating a Circulation Policy Group - Items Tab

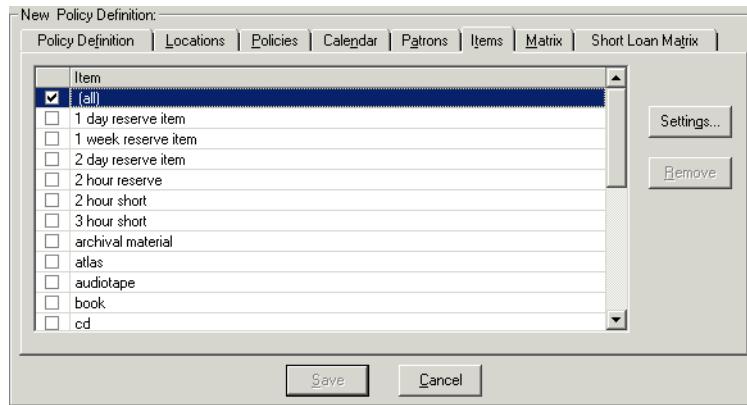
Use the following to define the Items associated with the Circulation Policy Group.

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.

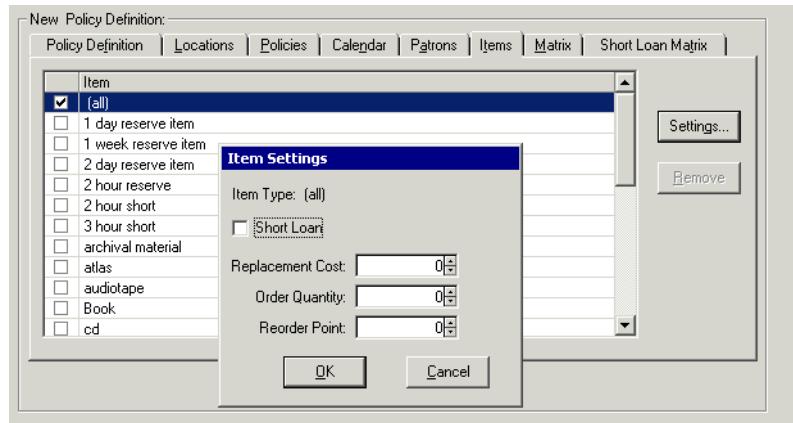
Result: The list of Item Types displays (see [Figure 5-74](#)).



**Figure 5-74.** 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 5-75](#)).



**Figure 5-75.** 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 5-17, Creating a Circulation Policy Group - Matrix Tab, on page 5-125](#)).
- 



### Procedure 5-17. 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.

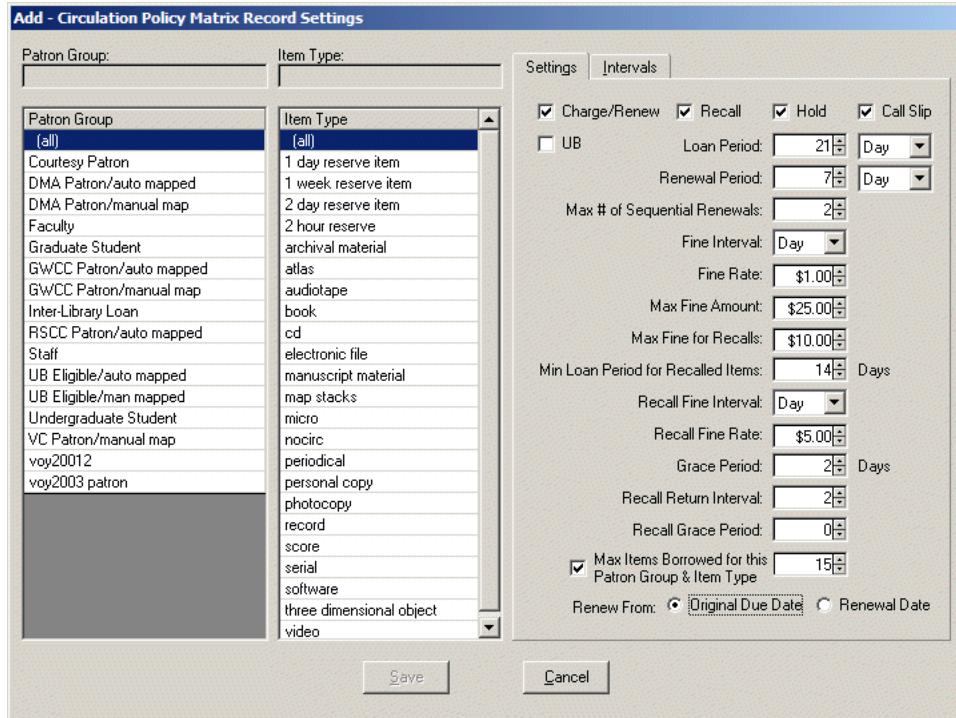
1. Access the **Circulation - Policy Definitions** workspace.
  - a. Click **Circulation** in the listbar.
  - b. Click the **Policy Definitions** button in the Circulation listbar.

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 5-76](#)).



**Figure 5-76. Example of a completed Settings Tab of the Add - Circulation Matrix Policy Record Settings dialog box**

4. To set up intervals for this matrix, click the **Intervals** tab.

Result: The **Interval** tab opens with its check boxes and fields available.

5. Enter the appropriate numbers in the each of the fields to provide the interval information (see [Figure 5-77](#)).

**Add - Circulation Policy Matrix Record Settings**

Patron Group:	Item Type:
<input type="text"/> <b>(all)</b> 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	<input type="text"/> <b>(all)</b> 1 day reserve item 1 week reserve item 2 day reserve item 2 hour reserve archival material alias audiotape book cd electronic file manuscript material map stacks micro nocirc periodical personal copy photocopy record score serial software three dimensional object video
<input type="button" value="Settings"/> <input type="button" value="Intervals"/>	
Courtesy Notice Interval: <input type="text" value="0"/> days Minimum Loan for Courtesy: <input type="text" value="0"/> days First Overdue Interval: <input type="text" value="3"/> days Lost Interval: <input type="text" value="45"/> days Other (Overdue) Notice Interval: <input type="text" value="2"/> days Other (Overdue) Notice Count: <input type="text" value="1"/> days Overdue Recall Notice Interval: <input type="text" value="3"/> days Overdue Recall Notice Count: <input type="text" value="2"/> days Hold Shelf Life: <input type="text" value="5"/> <input type="button" value="Day"/>	

**Figure 5-77. Completed Intervals Tab**

6. Click the **Save** button to save the matrix settings and intervals.

Result: The **Matrix** tab displays listing the newly-created matrix (see [Figure 5-78](#)).

Patron Group	Item Type
(all)	(all)
Courtesy Patron	book
Faculty	book
Student	book

**Figure 5-78.** 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 5-18, Creating a Circulation Policy Group - Short Loan Matrix Tab](#), on page [5-128](#)).



#### Procedure 5-18. 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.

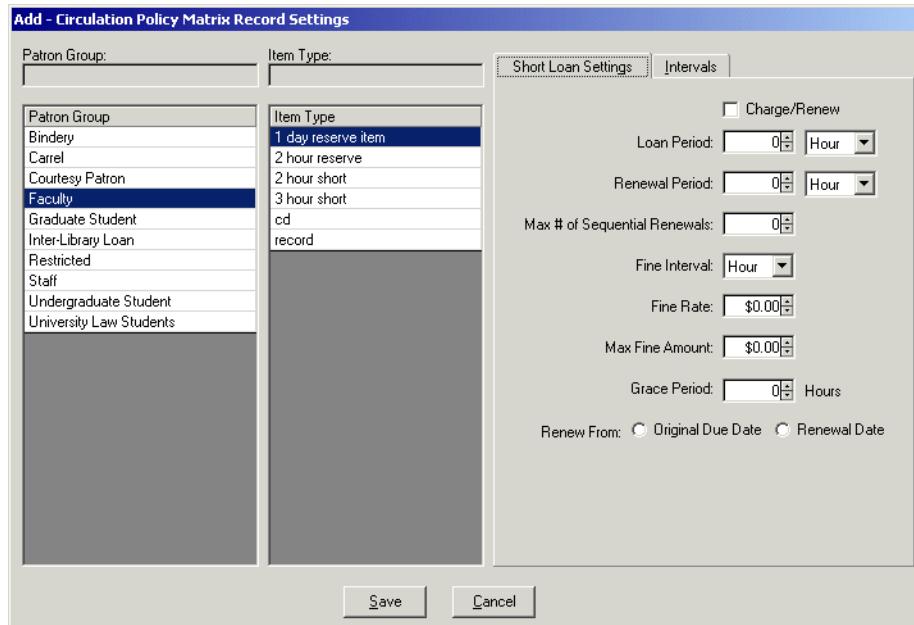
This includes the information defined on the **Matrix** tab that governs the loan for a specific Patron Group-Item Type combination, and the **Intervals** tab that defines the various interval periods/count for that specific Patron Group-Item Type combination.

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, and defining the Matrices, click the **Short Loan Matrix** tab, and then the **Add** button.

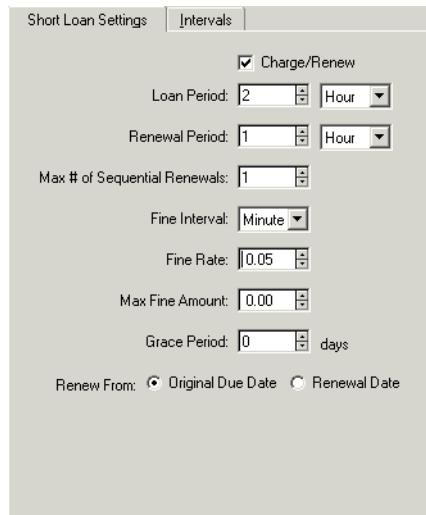
Result: The **Short Loan Settings** tab of the **Add - Circulation Policy Matrix Record Settings** (for Short Loans) dialog box opens (see [Figure 5-79](#)).



**Figure 5-79. Short Loan Settings Tab of the Add - Circulation Policy Matrix Record Settings (for Short Loans) dialog box**

3. Select the Patron Group and Item Type matrix whose settings you want to define. Perform the following on the **Short Loan Settings** tab:
  - a. Check the **Charge/Renew** check box if wanted.
  - b. Enter numbers in the fields to provide the short loan information.

Result: The **Short Loan Settings** tab is completed (see [Figure 5-80](#)).



**Figure 5-80.** Example of a completed Short Loan Settings Tab

4. Click the **Intervals** tab to set up intervals for this matrix.

Result: The **Interval** tab opens with its check boxes and fields available (see [Figure 5-81](#)).

Add - Circulation Policy Matrix Record Settings

Patron Group:	Item Type:
<input type="text"/>	<input type="text"/>
<b>Patron Group</b>	<b>Item Type</b>
Bindery	1 day reserve item
Carrel	2 hour reserve
Courtesy Patron	2 hour short
<b>Faculty</b>	3 hour short
Graduate Student	cd
Inter-Library Loan	record
Restricted	
Staff	
Undergraduate Student	
University Law Students	

Short Loan Settings | **Intervals**

Courtesy Notice Interval:  0 $\frac{1}{2}$  days  
Minimum Loan for Courtesy:  0 $\frac{1}{2}$  days  
First Overdue Interval:  0 $\frac{1}{2}$  days  
Lost Interval:  0 $\frac{1}{2}$  days  
Other (Overdue) Notice Interval:  0 $\frac{1}{2}$  days  
Other (Overdue) Notice Count:  0 $\frac{1}{2}$

**Save** | **Cancel**

---

**Figure 5-81. Intervals Tab**

5. Enter the appropriate numbers in the each of the fields to provide the interval information.
  6. 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-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.

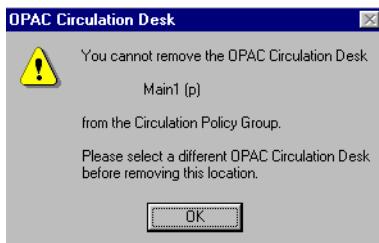
Also remember that if an item's location is moved to a location belonging to another Circulation Policy Group, that Group's circulation policies apply to all subsequent circulation transactions involving the item.

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 5-82](#)).

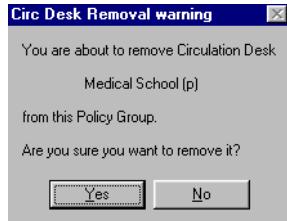
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**Figure 5-82. OPAC Circulation desk warning message**

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 5-83](#)).



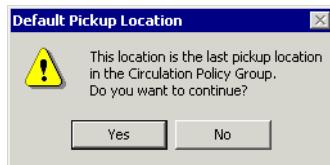
---

**Figure 5-83. 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 5-84](#)).

---



---

**Figure 5-84. Pickup location removal warning**



---

**Procedure 5-19. 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 5-136](#) for specific information on editing the **Matrix** tab.
- 

## **Deleting Circulation Policy Groups**

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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 5-85](#)).

---



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**Figure 5-85. Circulation Policy Group cannot be deleted message**

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## **Procedure 5-20. Deleting a Circulation Policy Group**

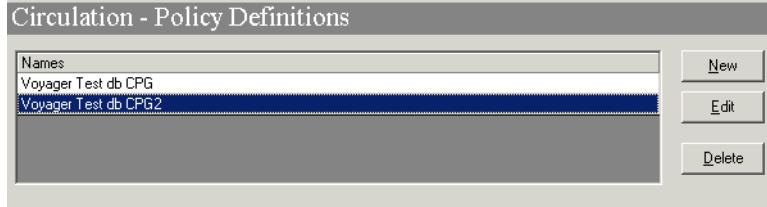
---

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 5-86](#) the Voyager Test db CPG2 group will be deleted. Click the **Delete** button.

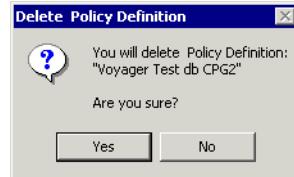


---

**Figure 5-86.** 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 5-87](#)).

---



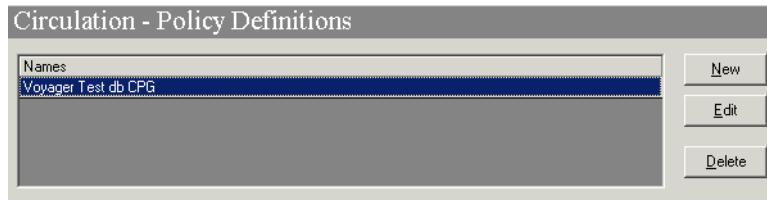
---

**Figure 5-87.** 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 5-88](#)).

---



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**Figure 5-88.** List of Circulation Policy Groups after deleting a group

---

**NOTE:**

See [Deleting a Circulation Policy Matrix](#) on [page 5-142](#) 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 5-21. Editing Circulation Matrix Information**

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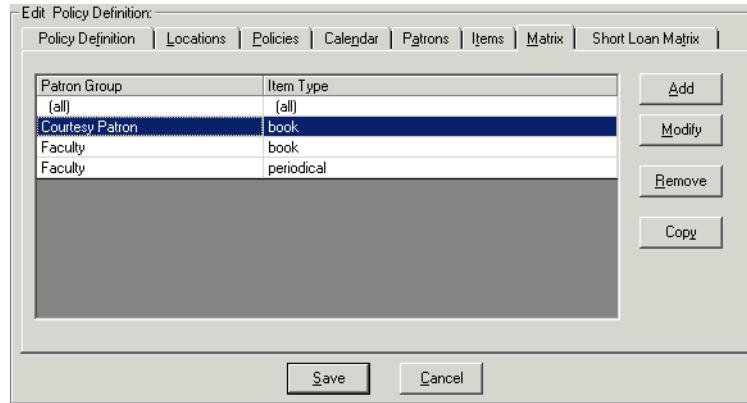
Use the following to edit a Circulation Matrix.

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 5-89](#)).

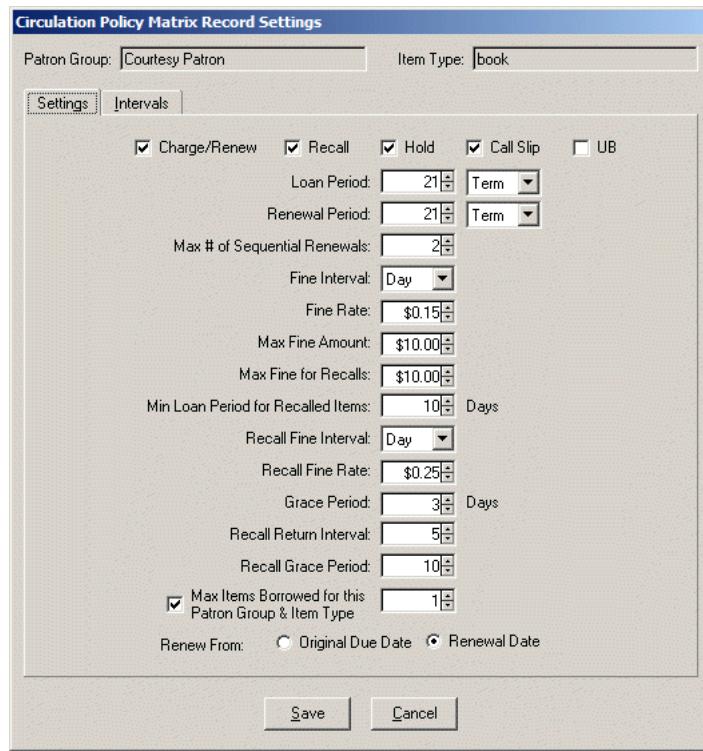


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**Figure 5-89. Matrix Tab**

4. Select the matrix you want to edit and click the **Modify** button.

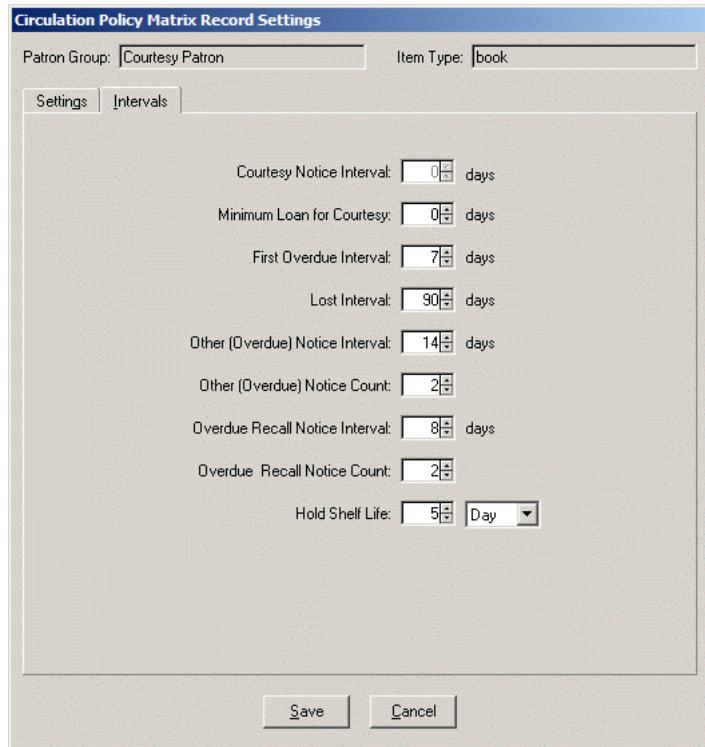
Result: In this example the matrix for Courtesy Patron-Book matrix will be modified. The **Circulation Policy Matrix Record Settings** dialog box for that matrix displays with the **Settings** tab available (see [Figure 5-90](#)).



**Figure 5-90. 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 5-90](#)).



**Figure 5-91. Circulation Policy Matrix Record Settings, Intervals Tab**

- 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 5-22. Copying Circulation Matrix Information to a New Matrix

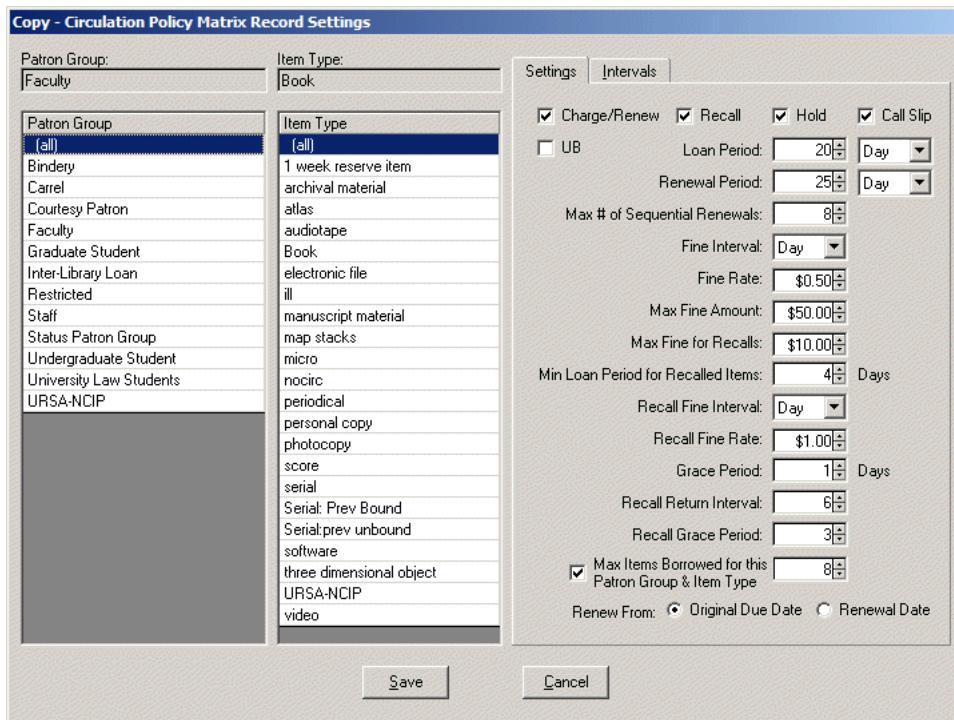
Use the following to copy a Circulation Matrix.

- 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.

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 5-92](#)). The information from the Faculty-Book matrix populates the fields on the **Settings** and **Intervals** tab.

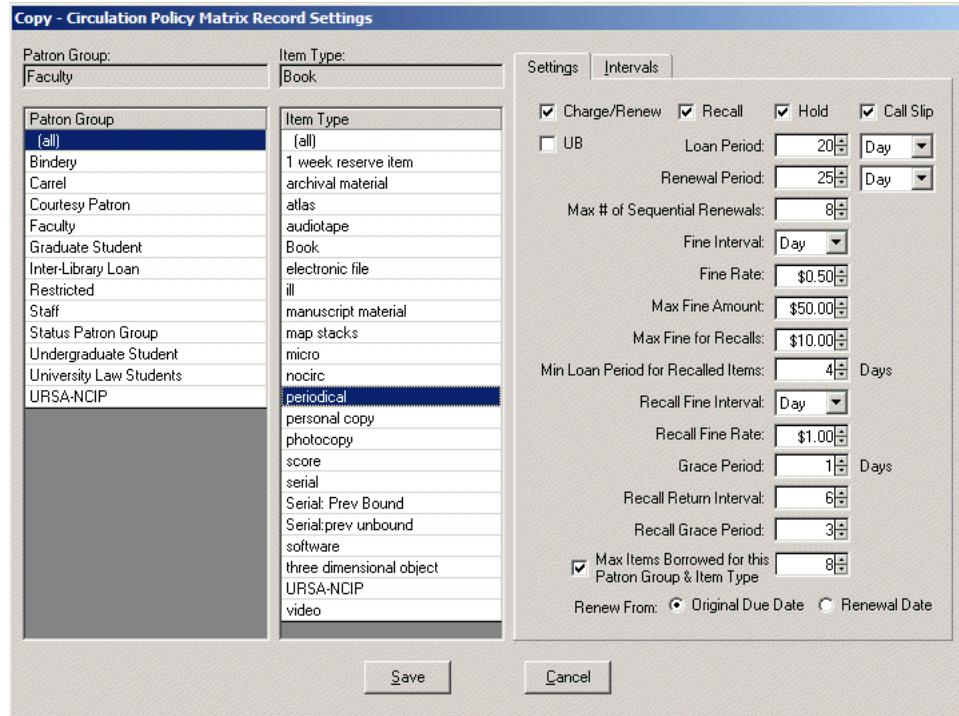


**Figure 5-92. Copy - Circulation Policy Matrix Record Settings dialog box**

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 5-93](#)).

**NOTE:**

If wanted, users can edit any of the fields on either tab.

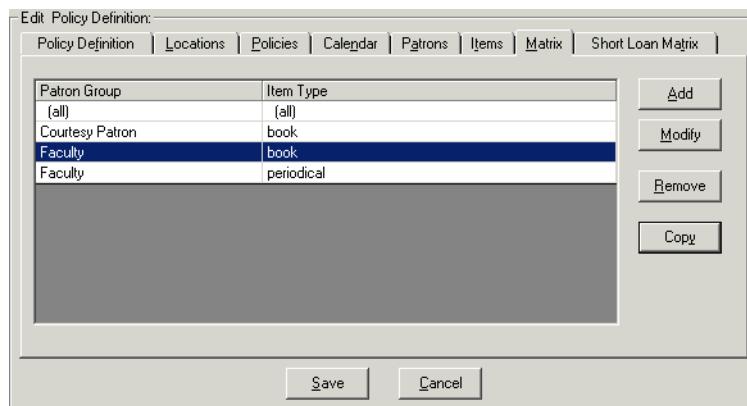


**Figure 5-93. Copying a Circulation Matrix**

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.

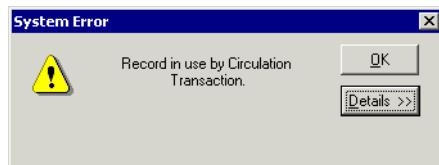
Result: The system returns to the **Matrix** tab listing the newly-defined Circulation Matrix (see [Figure 5-94](#)).



**Figure 5-94. 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 5-96](#)), when an operator attempts to delete it, a warning message stating the delete is not allowed displays (see [Figure 5-95](#)).



**Figure 5-95. Unable to delete the matrix**

**NOTE:**

Operators are not allowed to delete the all/all matrix.



### Procedure 5-23. Deleting a Circulation Policy Matrix

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Use the following to delete a Circulation Policy Matrix.

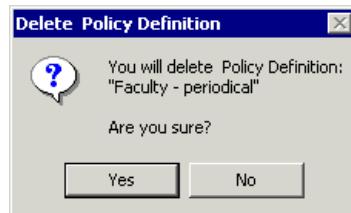
1. Access the **Circulation - Policy Definitions** workspace.
  - a. Click **Circulation** in the listbar.
  - b. Click the **Policy Definitions** button in the Circulation listbar.

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 5-96](#)).

---



---

**Figure 5-96. Confirmation message before deleting the Circulation Policy Matrix**

4. Click the **Yes** button to delete this Circulation Policy Matrix.

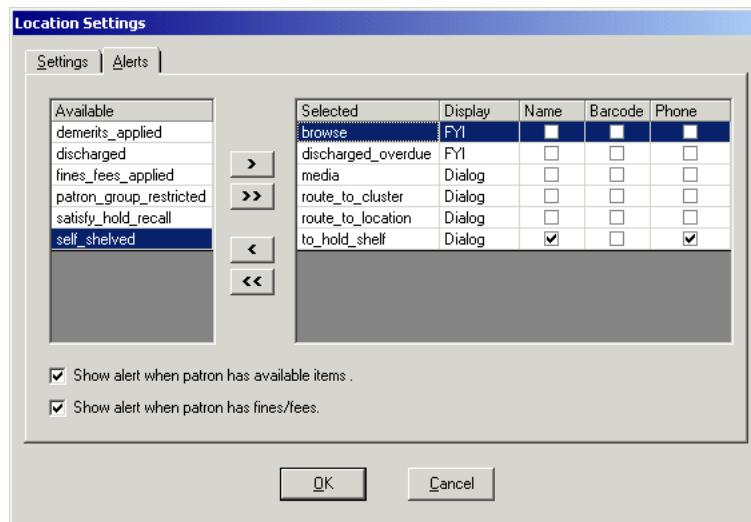
Result: The Circulation Policy Matrix is deleted, and no longer displays in the list on the **Matrix** tab.

---

## 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 5-97](#)) of the **Location Settings** dialog box for a selected circulation happening location. 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 5-97.** 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.  <b>NOTE:</b> Automatically displays in a <b>Circulation Alerts</b> dialog box.
Show alert when patron has available items	Patron has available requested items.	Patron has requested items available.  <b>NOTE:</b> Automatically displays in a <b>Circulation Alerts</b> 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>  <b>NOTE:</b> Administrators can configure specific patron information to display, such as the patron's name, barcode, and/or phone number.

**Table 5-26. Discharge Conditions**

<b>Available Alert on Alerts Tab (System Administration)</b>	<b>Condition</b>	<b>Text of Alert</b>
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>
fines_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 <a href="#">Patron Groups Tab</a> on page 9-88.	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 5-98](#). This alert stops the circulation processing and requires the operator to acknowledge the alert by clicking the **OK** button before performing more discharges.



Figure 5-98. 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 5-99](#)) of the **Discharge** workspace.

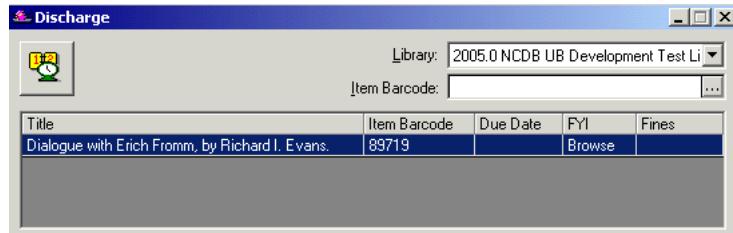
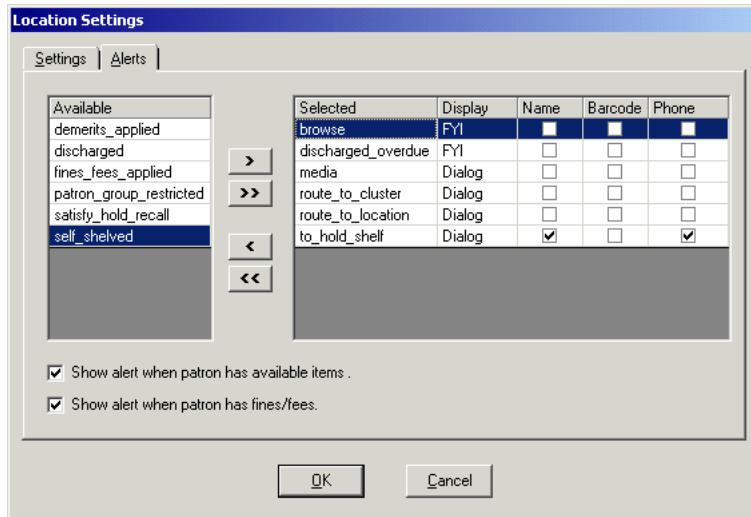


Figure 5-99. Circulation Alert displaying in the FYI column

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 5-100](#) shows the **Alerts** tab.

**Figure 5-100.** Alerts Tab

[Table 5-27](#) describes the **Alerts** tab.

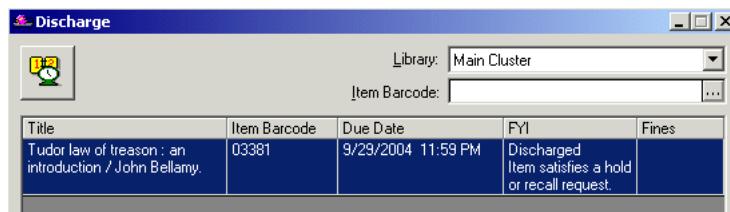
**Table 5-27.** Alerts Tab

Component	Description	Range
Available column	The possible conditions that occur at discharge for which a message alert can be configured.  See <a href="#">Alert Conditions when Discharging</a> .	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. <ul style="list-style-type: none"> <li>• FYI displays in the <b>FYI</b> column.</li> <li>• Dialog - displays in the <b>Circulation Alerts</b> dialog box.</li> </ul>	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.  <b>NOTE:</b> 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.  <b>NOTE:</b> Displays in a Circulation Alerts dialog box only.	Check box

If multiple discharge conditions exist, each is reported on a separate line using the method configured. For example, [Figure 5-101](#) shows two alerts reported in the **FYI** column.



**Figure 5-101. Multiple alerts displaying in the FYI column**

[Figure 5-102](#) shows two alerts reported in the **Circulation Alerts** dialog box.



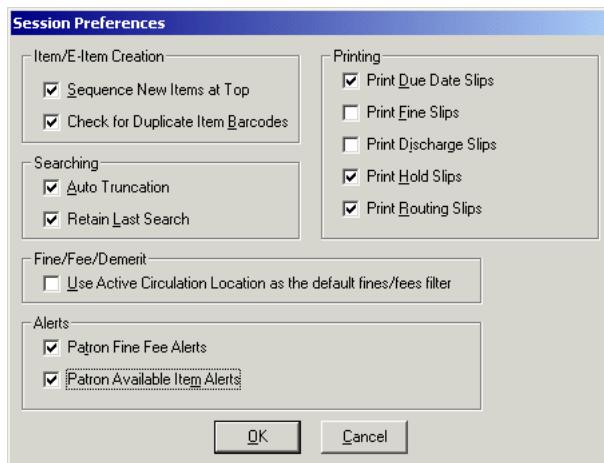
**Figure 5-102.** Multiple alerts displaying in a Circulation Alerts dialog box

All alerts display as configured, so operators may see both the **Circulation Alerts** dialog box and alert information in the **FYI** column 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** dialog box displays if configured.

In the Circulation module, **Session Preferences** dialog box ([Figure 5-103](#)), 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 information on session preferences, see the Voyager Circulation User's Guide, [Session Preferences Dialog Box](#).



**Figure 5-103.** Session Preferences dialog box

---

For the step-by-step procedure on how to configure circulation alerts, see [Procedure 5-12, Configuring Circulation Alerts](#).

## **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 9-23](#).

## **Rules for Request Groups**

---

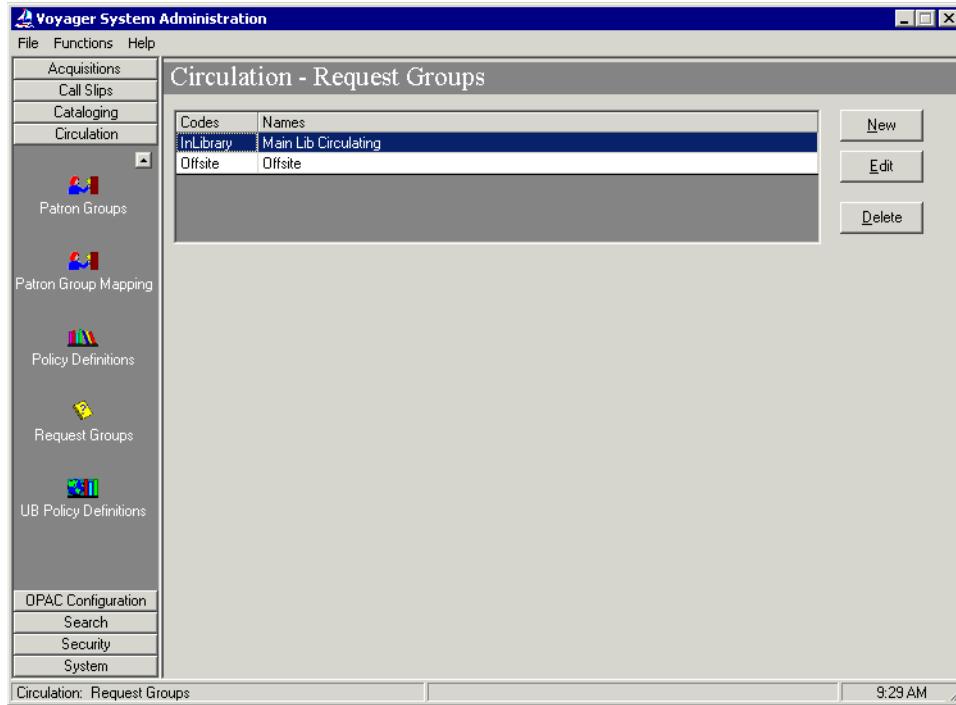
A location may only be assigned to one Request Group.

Request Groups are only available in the Circulation module, not in WebVoyage.

## **Request Groups Workspace**

---

Creating Request Groups is done in the **Circulation - Request Groups** workspace in the System Administration module (see [Figure 5-104](#)).



---

**Figure 5-104. Circulation - Request Group Workspace**

The bottom part of this workspace, visible after clicking the **New** or **Edit** button, contains a **Group** tab and a **Location** tab (see [Figure 5-105](#)).

---

---

Circulation - Request Groups

Codes	Names
InLibrary	Main Lib Circulating

New Request Group:

Group | Locations |

Code:

Name:

---

**Figure 5-105.** 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 5-105](#)).

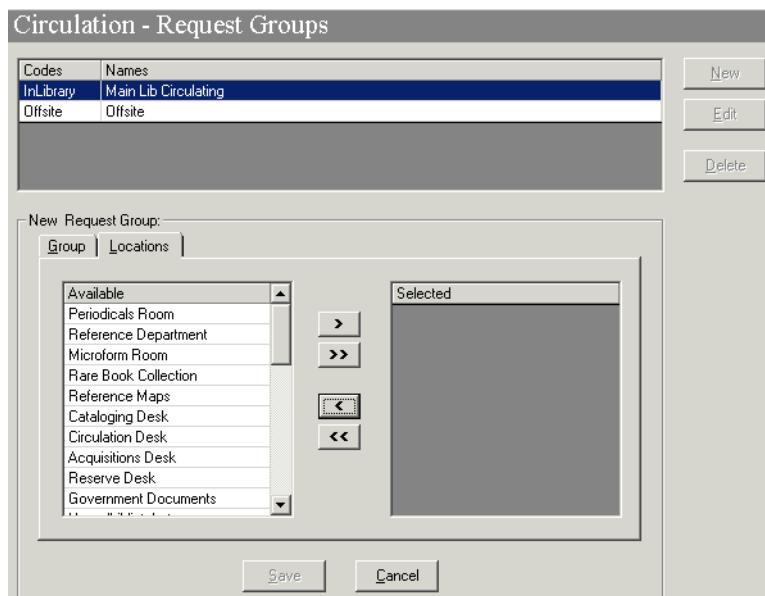
[Table 5-28](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Group** tab.

**Table 5-28. 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 5-106](#)).



**Figure 5-106. Circulation Request Groups Workspace Location Tab**

[Table 5-29](#) provides names, descriptions, if required, and type and range requirements for the fields in the **Group** tab.

**Table 5-29. 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 5-24. 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 5-107](#)). Click the **Location** tab.

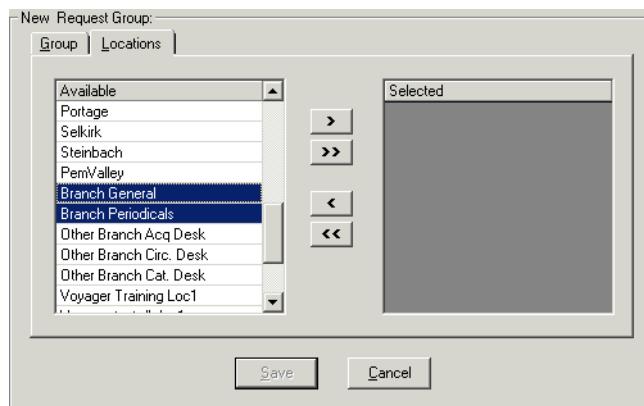
---

The screenshot shows a 'New Request Group' dialog box. At the top, there's a tabs section with 'Group' and 'Locations'. Below that, there are two input fields: 'Code' containing 'Branch' and 'Name' containing 'Branch Library'. At the bottom are 'Save' and 'Cancel' buttons.

---

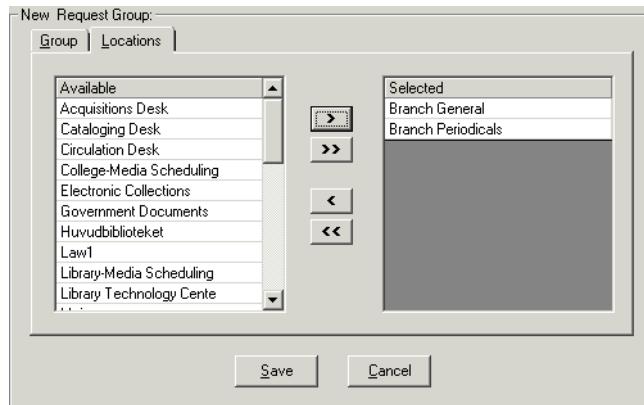
**Figure 5-107. Group Tab**

4. Add locations to this Request Group
  - a. Highlight the wanted location(s) in the **Available** list box (see [Figure 5-108](#)).



**Figure 5-108.** Available Locations list box

- b. Click the **>** button (see [Figure 5-109](#)). The locations move from the **Available** list box to the **Selected** list box.



**Figure 5-109.** Selected Locations list box

**NOTE:**

If you want to select all of the locations click the **>>** button.

- c. Click the **Save** button.

Result: The system returns to the **Circulation - Request Groups** workspace and the new Request Group is listed (see [Figure 5-110](#)).

Circulation - Request Groups	
Codes	Names
Branch	Branch Library
InLibrary	Main Lib Circulating
Offsite	Offsite

**Figure 5-110.** Circulation - Request Groups with new group added

### Editing Request Groups

Operators may edit Request Groups as necessary.



#### Procedure 5-25. 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 5-26. 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 5-111](#)).



---

**Figure 5-111. 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 Endeavor's 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 Endeavor's 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.

---

## Defining Circulation Blocks

# 6

---

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## Defining Circulation Blocks

# 6

---

### 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 WebVoyáge, 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: one pertains to patron behavior, the other 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 conditions 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: Patron

Related Exceptions, Item Related Exceptions, and Transaction Related Exceptions. For information about this job, see the *Voyager Reporter User's Guide, Transaction Exceptions (Circjob 24)*.

[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.
20	Overdue limit override.
21	Overdue recall limit override.
22	Recall limit override.
23	Claims returned limit override.
24	Lost limit override.

---

**Table 6-1. Exception Types and Descriptions**

<b>Exception Number</b>	<b>Description of Exception</b>
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.
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.

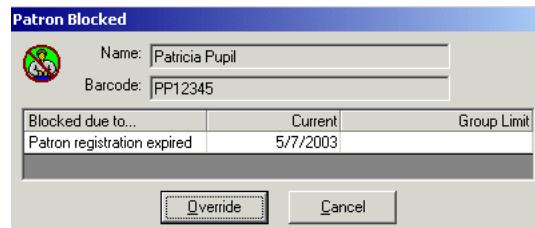
### Patron Expired

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](#)).

A screenshot of a computer screen showing the 'History' tab of a patron record. The tab bar includes 'Patron Id', 'Address/Phone', 'Counters', 'Proxy Patrons', and 'History'. The 'History' tab is active. Below the tabs, there are several fields: 'Registered:' (empty), 'Created:' (12/17/1999), 'by:' (SYSTEM), 'at:' (empty), 'Updated:' (12/17/1999), 'by:' (SYSTEM), 'at:' (empty), 'Expires:' (5/21/2003), 'Purge:' (12/31/2382), and 'Suspend Until:' (empty). The 'Expires:' field is highlighted.

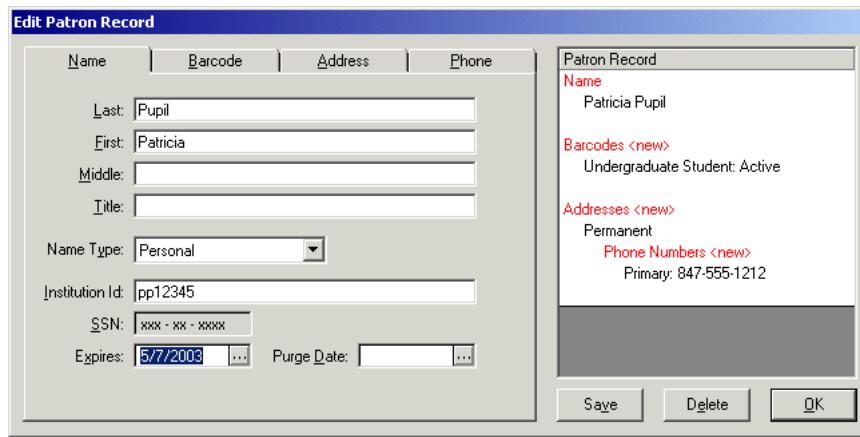
**Figure 6-1. History Tab, Expires Field**

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.



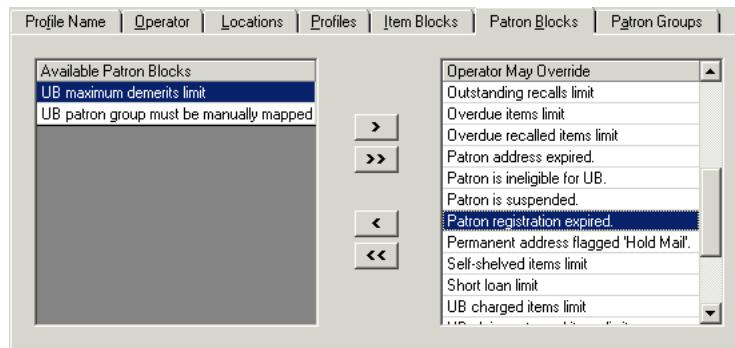
**Figure 6-2. Patron Registration Expired Block Message**

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*, [Editing a Patron Record](#).



**Figure 6-3. Edit Patron Record Dialog Box, Expires Field**

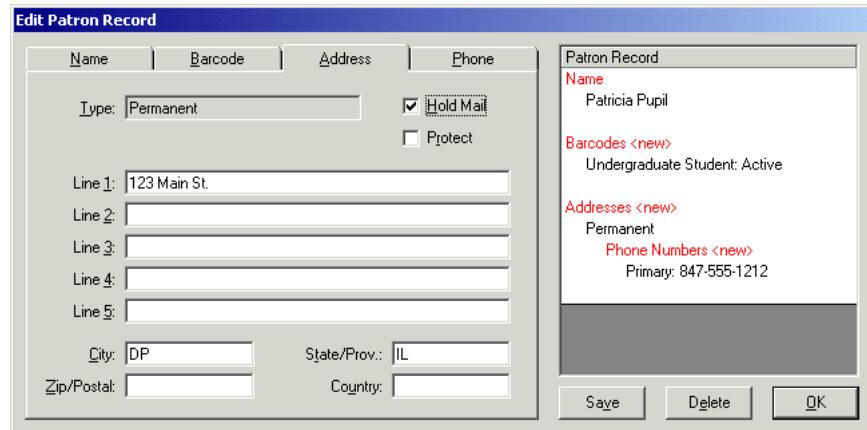
To override this block instead of resolving it, the operator must have Patron registration expired in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-4](#)).



**Figure 6-4. Patron Registration Expired Override Ability**

## Address Invalid

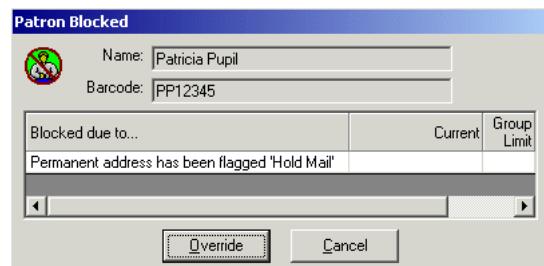
The system determines if the patron's permanent address is valid. This is a system-defined block and cannot be changed. The system checks the **Hold Mail** check box on the **Address** tab of the patron record's permanent address ([Figure 6-5](#)).



**Figure 6-5. Address tab, Hold Mail Check Box**

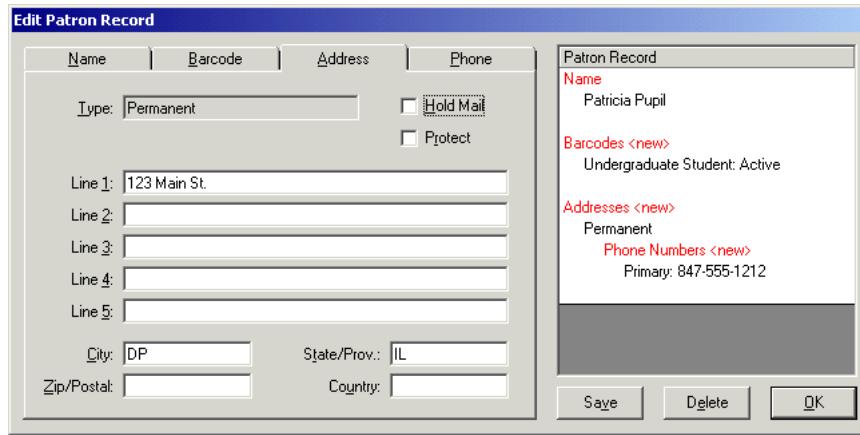
The address invalid block arises when the **Hold Mail** check box for the permanent address is selected. [Figure 6-6](#) shows the Permanent Address has been flagged 'Hold Mail' message seen in the Circulation module for this block.

---



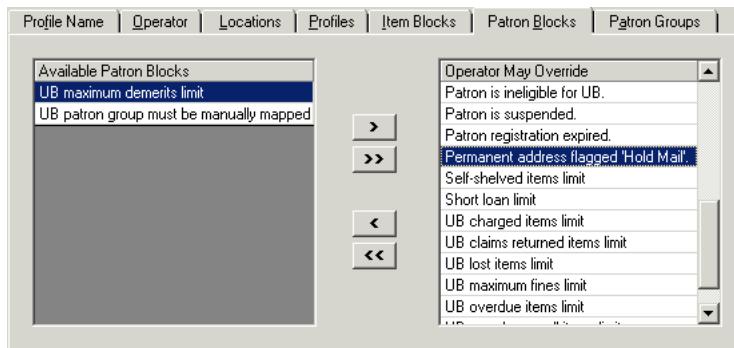
**Figure 6-6. Permanent Address has been Flagged 'Hold Mail' Block Message**

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*, [Editing a Patron Record](#).



**Figure 6-7. Edit Patron Record Dialog Box, Hold Mail Check Box**

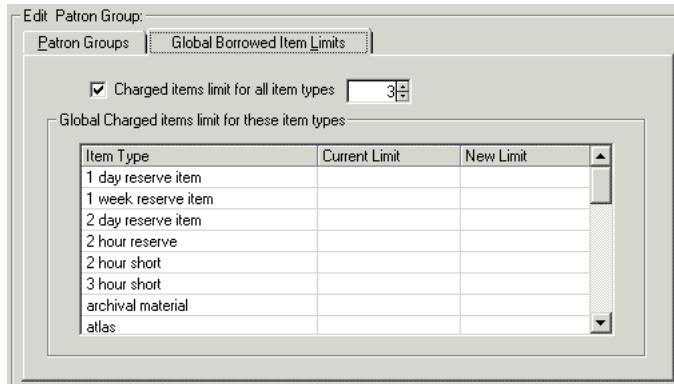
To override this block instead of resolving it, the operator must have Permanent Address flagged 'Hold Mail' in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-8](#)).



**Figure 6-8. Permanent Address flagged 'Hold Mail' Override Ability**

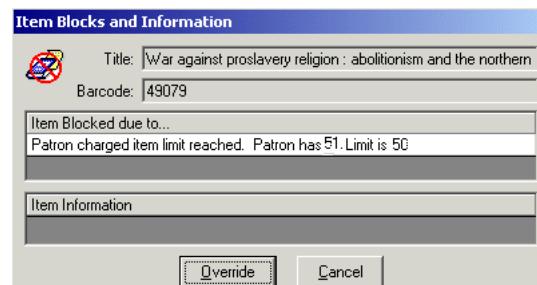
### Charge Limit (cluster-wide)

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](#)).



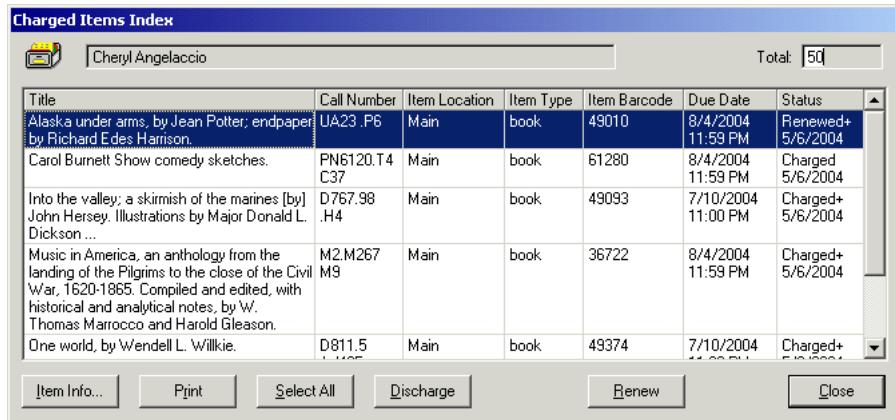
**Figure 6-9. Global Borrowed Item Limits Tab, Charged Items Limit for All Item Types Field**

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.



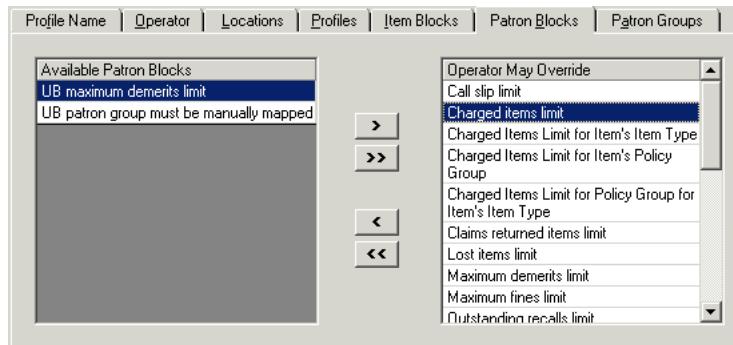
**Figure 6-10. Patron Charged Item Limit Reached Block Message**

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*, [Charged Items Index Dialog Box](#), or [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](#)).

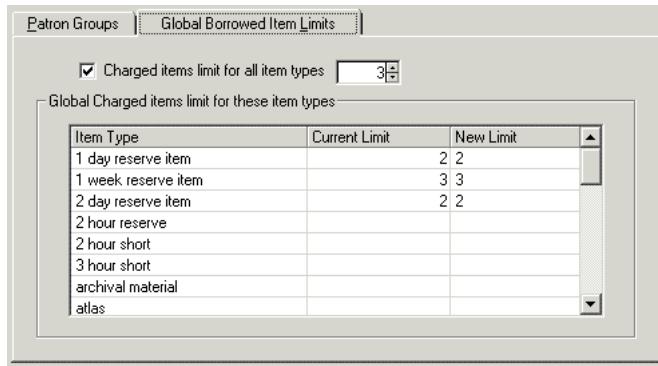


**Figure 6-12.** Charged Items Limit Override Ability

#### Charge Limit for Items of a Specific Type (cluster-wide)

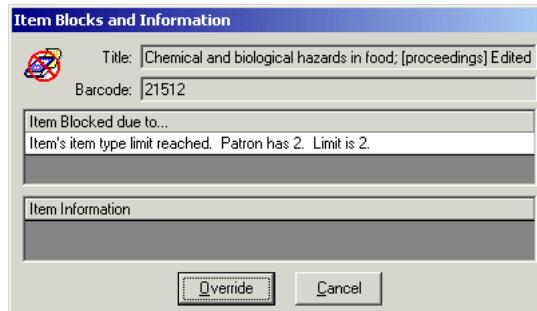
The system compares the number of items, which have the same item type (from all policy groups) as the item type of the item to be charged, that the patron has on loan to the cluster-wide borrowing limit for the item's item type. The value in the

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](#)).



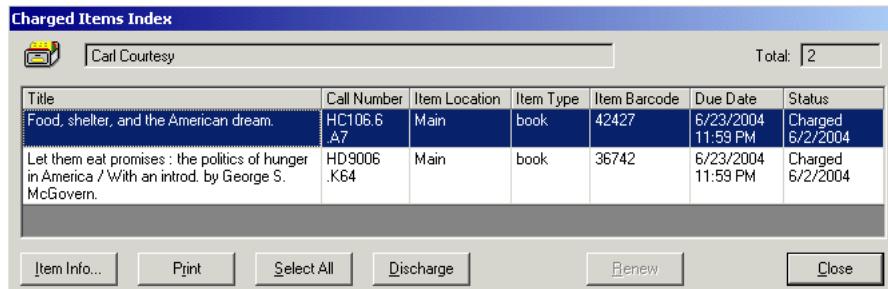
**Figure 6-13. Global Borrowed Item Limits Tab, Item Type-Current Limit Cell**

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.



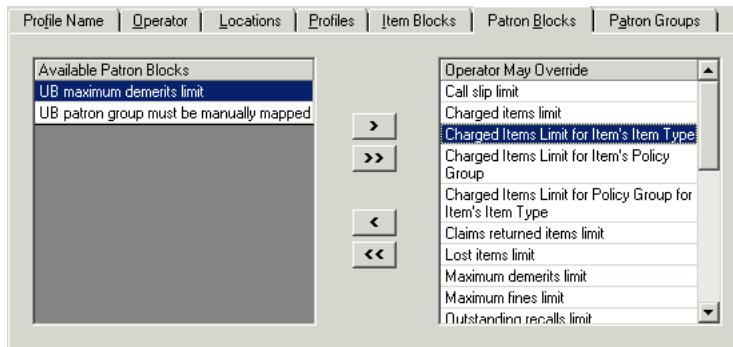
**Figure 6-14. Item's Item Type Limit Reached Block Message**

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*, [Charged Items Index Dialog Box](#), or [The Discharge Workspace](#).



**Figure 6-15.** Charged Items Index Dialog Box, Used to Discharge an Item

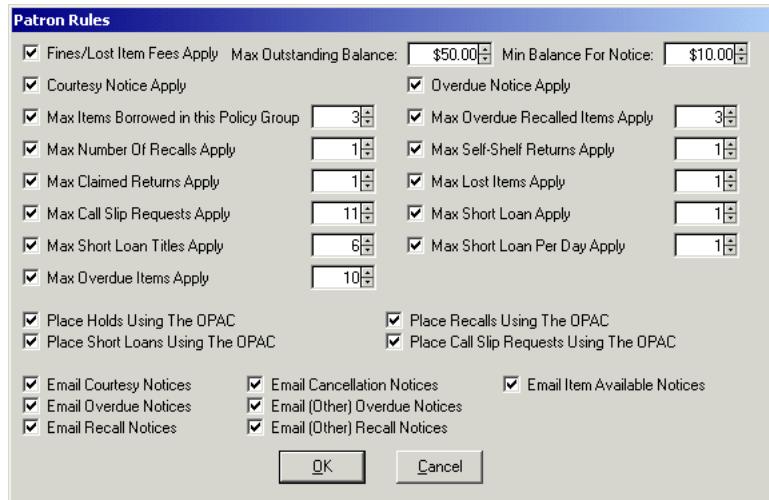
To override this block instead of resolving it, the operator must have Charged Items Limit for Item's Item Type in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-16](#)).



**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](#)).



**Figure 6-17. Patron Rules Dialog Box, Max Items Borrowed in this Policy Group**

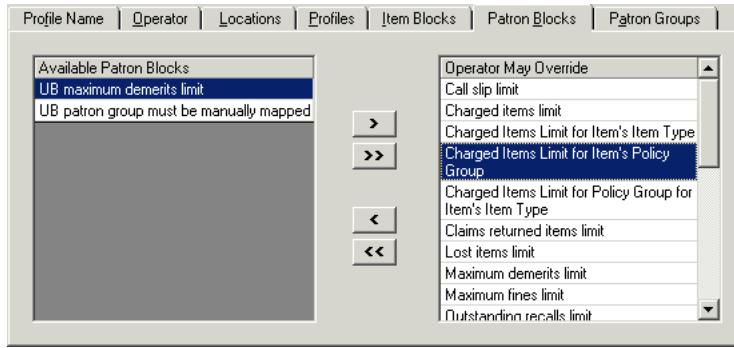
The charged items limit for the Item's Policy Group block arises when the patron attempts to charge an item within the item's policy group and this limit is surpassed. Renewal is allowed at the limit, but may not surpass it. [Figure 6-18](#) shows the Patron Charge item limit block message seen in the 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*, [Charged Items Index Dialog Box](#), or [The Discharge Workspace](#).

**Figure 6-19. Charged Items Index dialog box used to discharge an item**

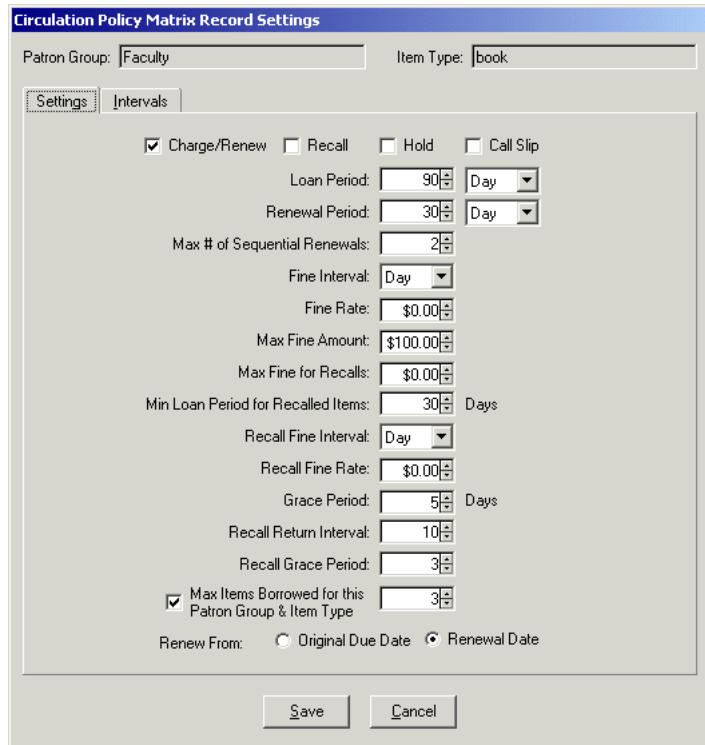
To override this block instead of resolving it, the operator must have Charged Items Limit for Item's Policy Group in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-20](#)).



**Figure 6-20. Charged Items Limit for Item's Policy Group Override Ability**

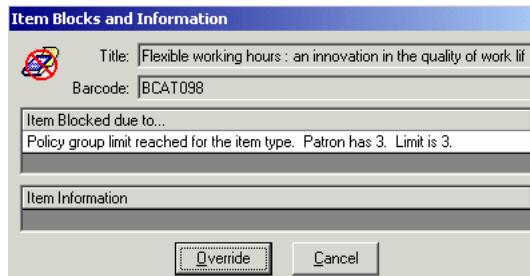
#### **Charge Limit for Items of a Specific Type (within the Circulation Policy Group)**

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](#)).



**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**

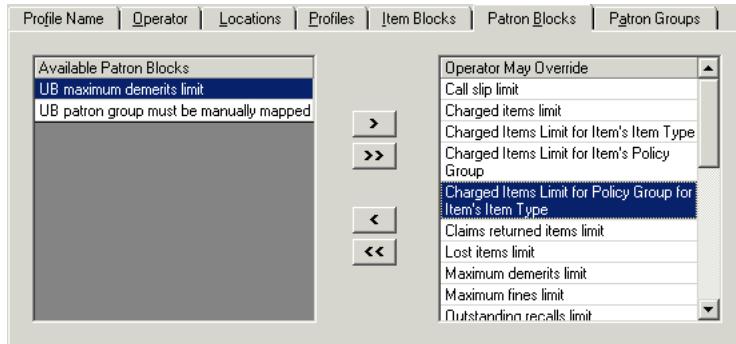
To resolve this block, discharge an item of that type that belongs to the item's circulation policy group such that the limit is no longer surpassed [Figure 6-23](#). For information on how to discharge an item, see the *Voyager Circulation User's Guide*, [Charged Items Index Dialog Box](#), or [The Discharge Workspace](#).

Charged Items Index						
Fiona Faculty		Total: 3				
Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Capitalism and competition : oil industry divestiture and the public interest : proceedings of the Johns Hopkins University Conference on Divestiture, Washington, D.C., May 27, 1976 / sponsored by the Center for Metropolitan Planning and Research and Scho...		Other Branch Cat. Desk	book	BCAT789	8/31/2004 11:59 PM	Charged 6/2/2004
Few figs from thistles : poems and sonnets / by Edna St. Vincent Millay.		Other Branch Cat. Desk	book	BCAT123	8/31/2004 11:59 PM	Charged 6/2/2004
Standard Oil Company : the rise of a national monopoly.		Other Branch Cat. Desk	book	BCAT456	8/31/2004 11:59 PM	Charged 6/2/2004

Buttons at the bottom include: Item Info..., Print, Select All, Discharge, Renew, and Close.

**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](#)).

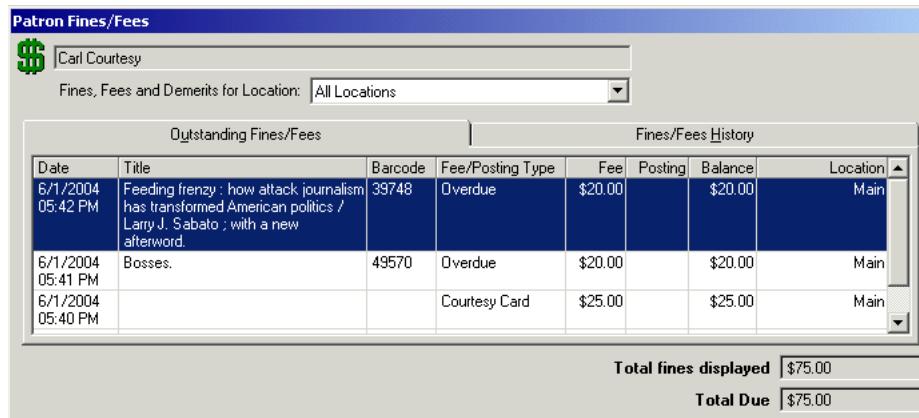


**Figure 6-24. Charged Items Limit for Policy Group for Item's Item Type Override Ability**

### Fine Limit

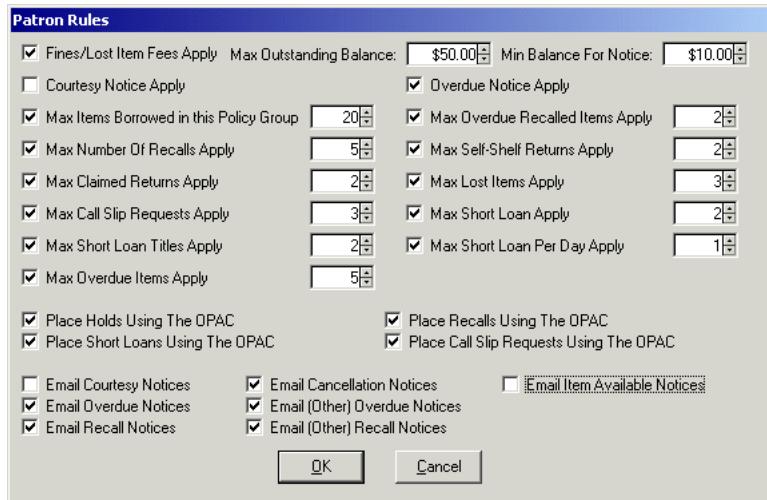
---

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](#)).



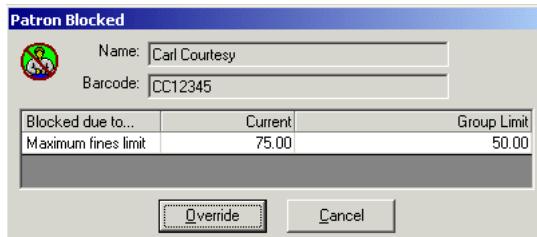
**Figure 6-25. Patron Fines/Fees Dialog Box**

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](#)).



**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.



**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*, [Posting Against Fines/Fees](#).

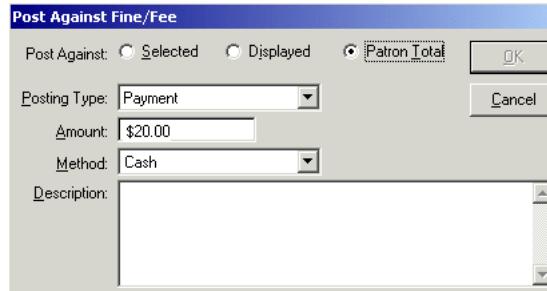


Figure 6-28. Post Against Fines/Fees Dialog Box

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](#)).

---

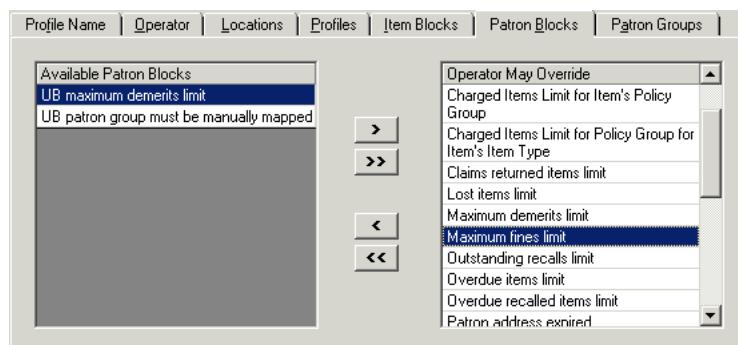
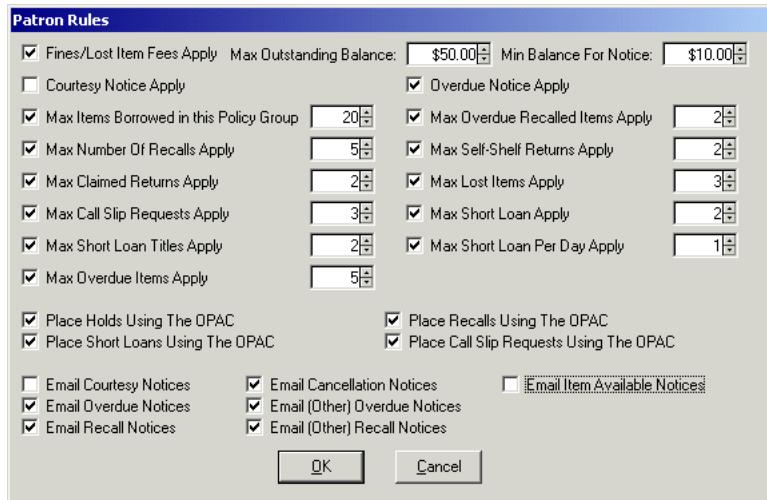


Figure 6-29. Maximum Fines Limit Override Ability

### Overdue Limit

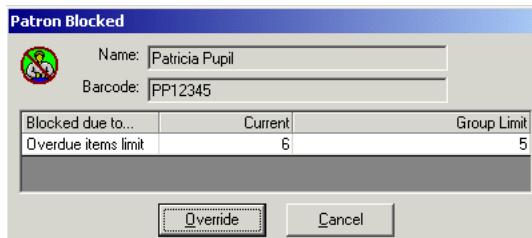
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The system compares the current number of overdue items to the patron's patron group limit. The **Max Overdue Items** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab for the selected patron group defines the limit ([Figure 6-30](#)).



**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.

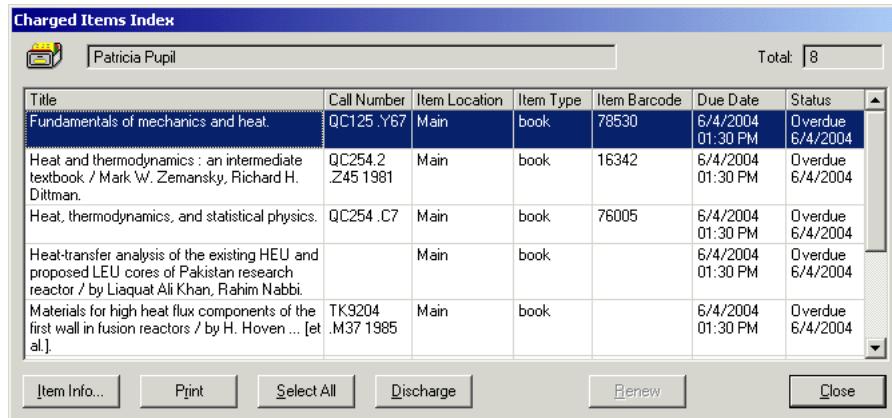


**Figure 6-31. Overdue Items Limit Block Message**

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*, [Charged Items Index Dialog Box](#).

## Defining Circulation Blocks

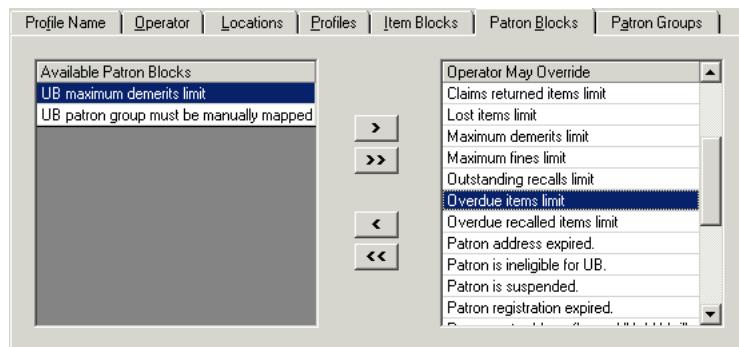
---



**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](#)).

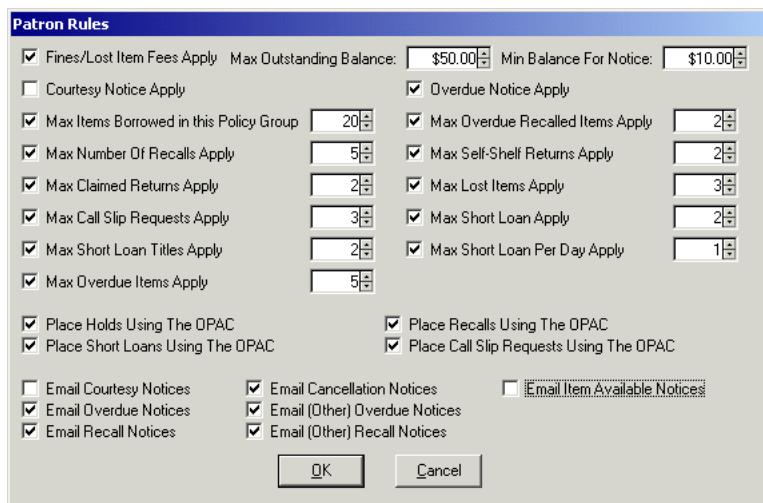
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**Figure 6-33. Overdue Items Limit Override Ability**

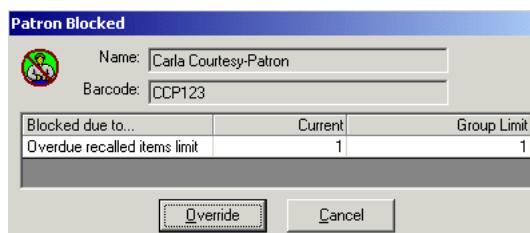
## Overdue Recall Limit

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](#)).



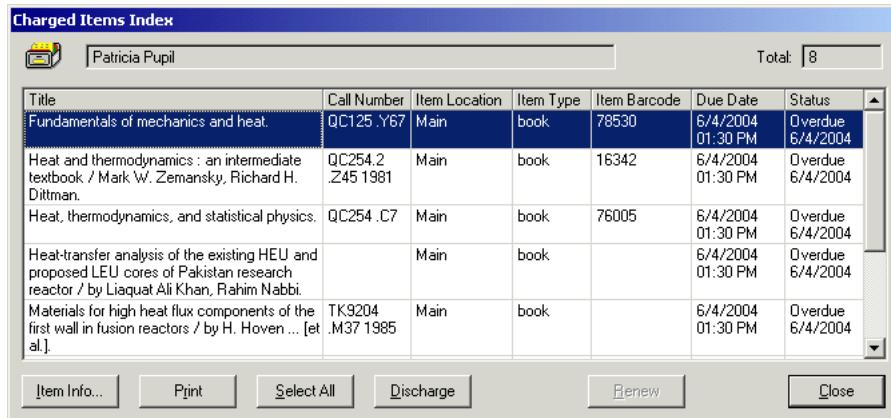
**Figure 6-34. Patron Rules Dialog Box, Max Overdue Items Numerical Limit**

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.



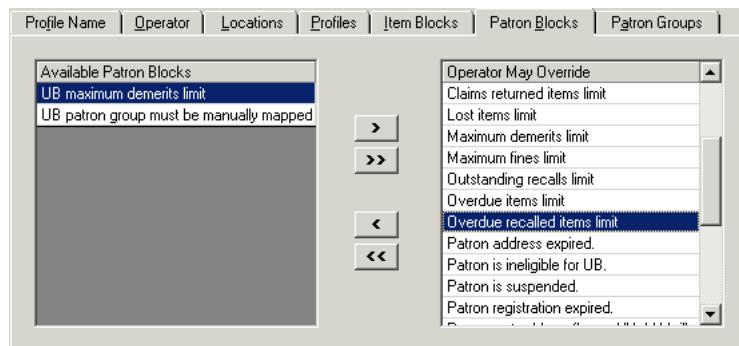
**Figure 6-35. Patron Overdue Recall Items Limit Block Message**

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*, [Charged Items Index Dialog Box](#).



**Figure 6-36. Charged Items Index Dialog Box Used to Discharge an Item**

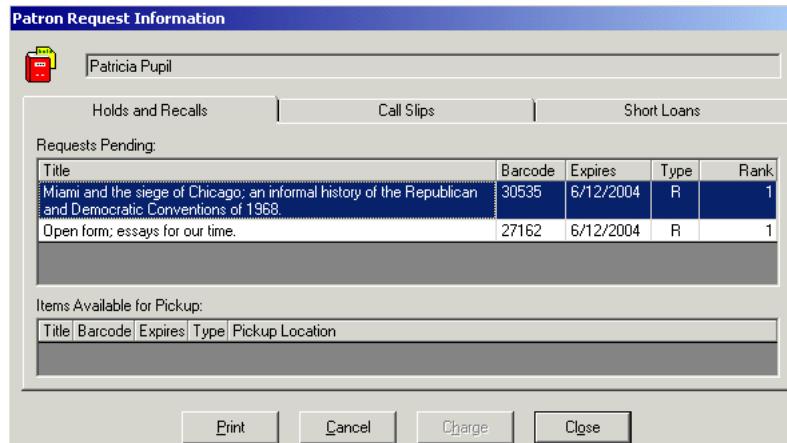
To override this block instead of resolving it, the operator must have Overdue recalled items limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-37](#)).



**Figure 6-37. Overdue Recalled Items Limit Override Ability**

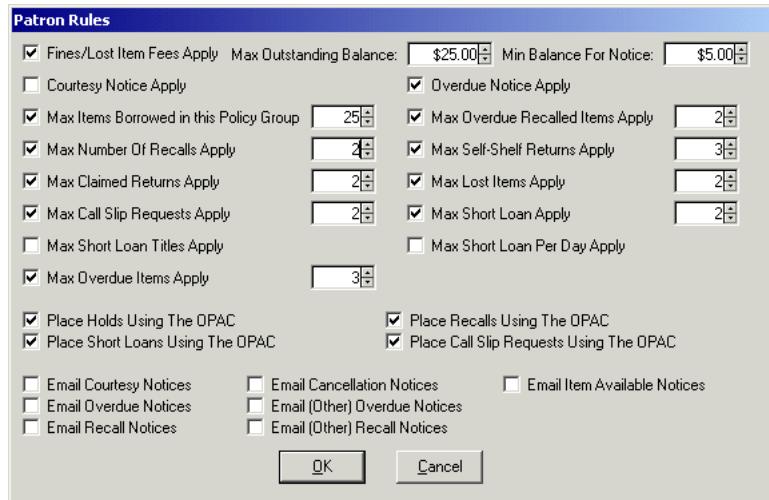
## Recall Limit

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](#))



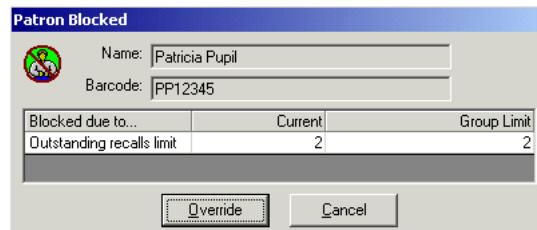
**Figure 6-38. Patron Request Information Dialog Box, Holds and Recalls Tab**

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](#)).



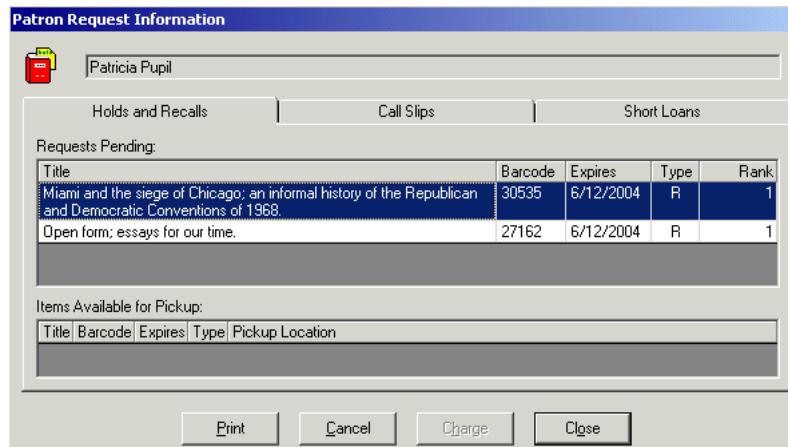
**Figure 6-39. Patron Rules Dialog Box, Max Number of Recalls Numerical Limit**

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.



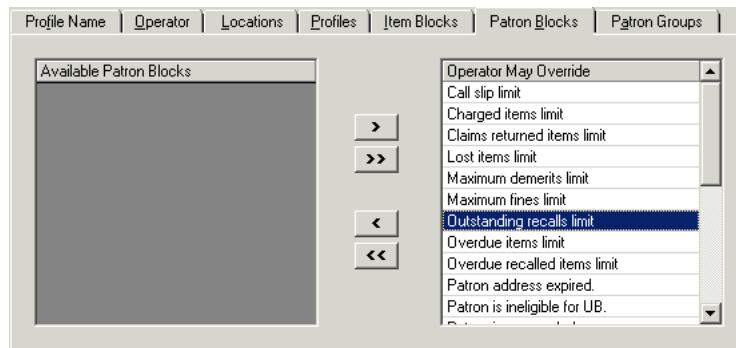
**Figure 6-40. Outstanding Recalls Limit Block Message**

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*, see [Patron Request Information](#).



**Figure 6-41.** Patron Request Information Dialog Box

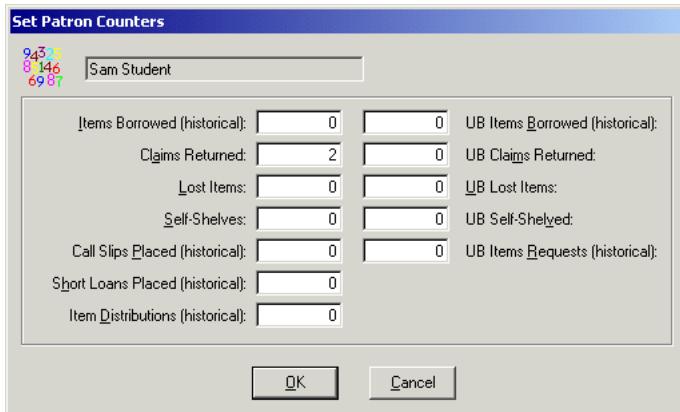
To override this block instead of resolving it, the operator must have Outstanding recalls items limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-42](#)).



**Figure 6-42.** Outstanding Recalls Items Limit Override Ability

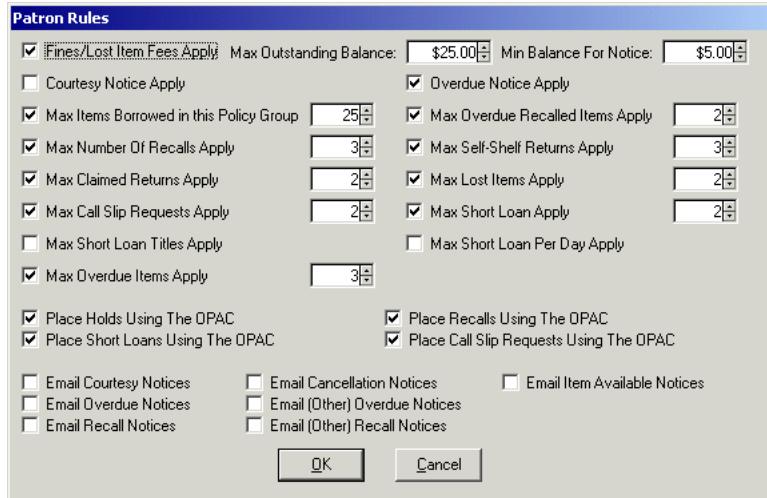
## Claims Returned Limit

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](#))



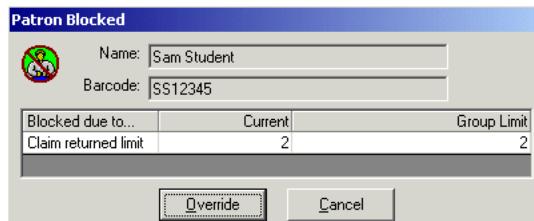
**Figure 6-43. Patron Record Claims Returned**

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](#)).



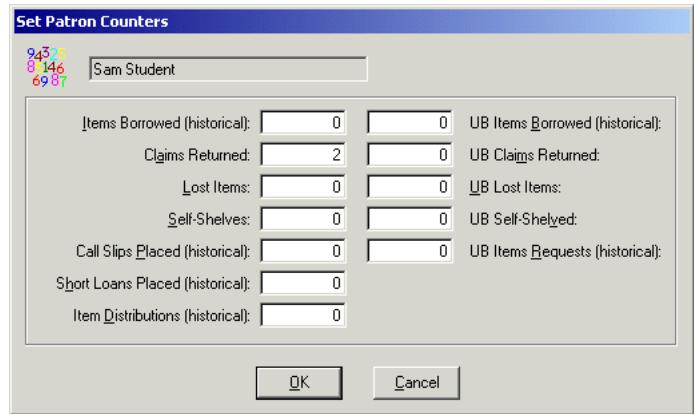
**Figure 6-44. Patron Rules Dialog Box, Max Claimed Returns Numerical Limit**

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.



**Figure 6-45. Claim Returned Limit Block Message**

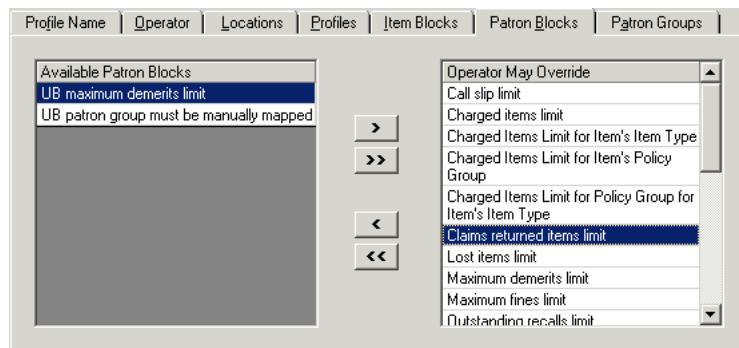
To resolve this block, the circulation operator must manually reduce this counter such that it is less than the patron group limit. Use the **Set Patron Counters** dialog box ([Figure 6-46](#)) to manually reduce a patron's counter. For information on how to reduce the counter, see the *Voyager Circulation User's Guide*, see [Setting Patron Counters](#).



**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](#)).

---

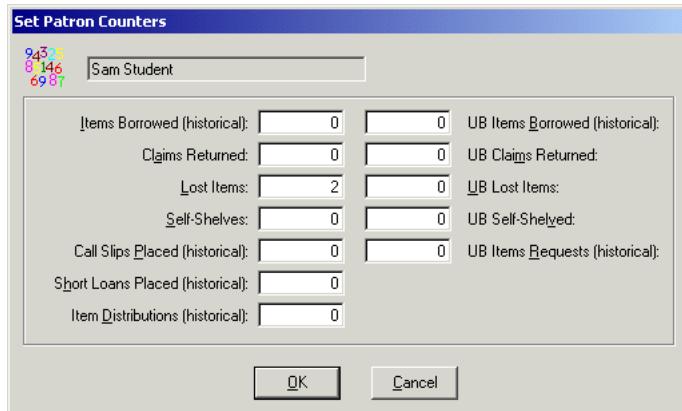


**Figure 6-47. Claims Returned Items Limit Override Ability**

### **Lost Limit**

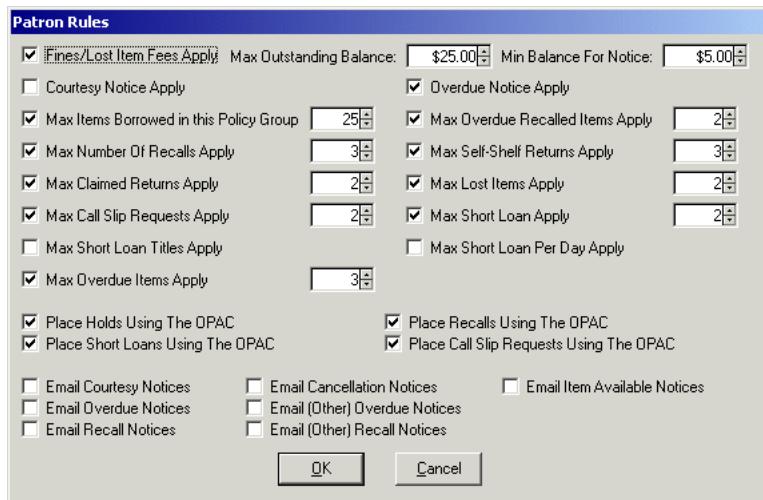
---

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](#)).



**Figure 6-48. Patron Record Lost Items**

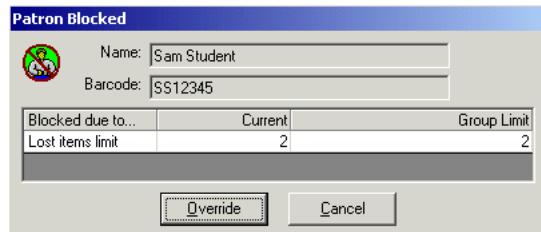
The **Max Lost Items** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab, defines the limit for the selected patron group ([Figure 6-49](#)).



**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.

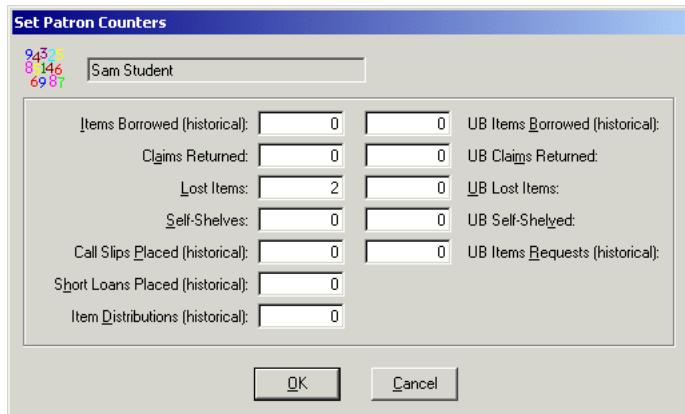
---



**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*, see [Setting Patron Counters](#).

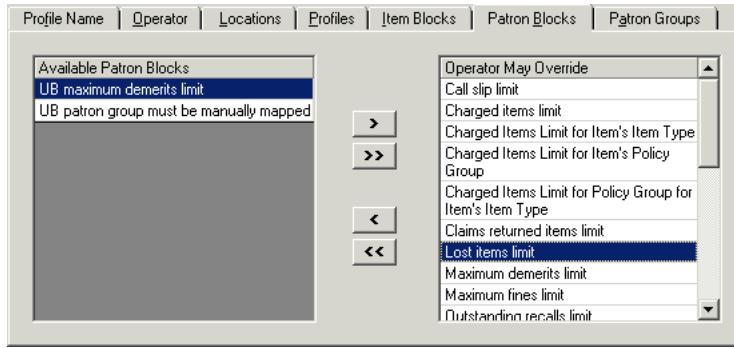
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**Figure 6-51. Set Patron Counters Dialog Box**

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](#)).

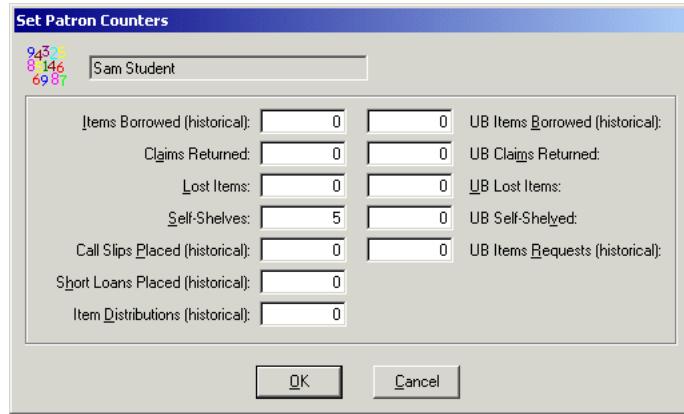
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**Figure 6-52. Lost Items Limit Override Ability**

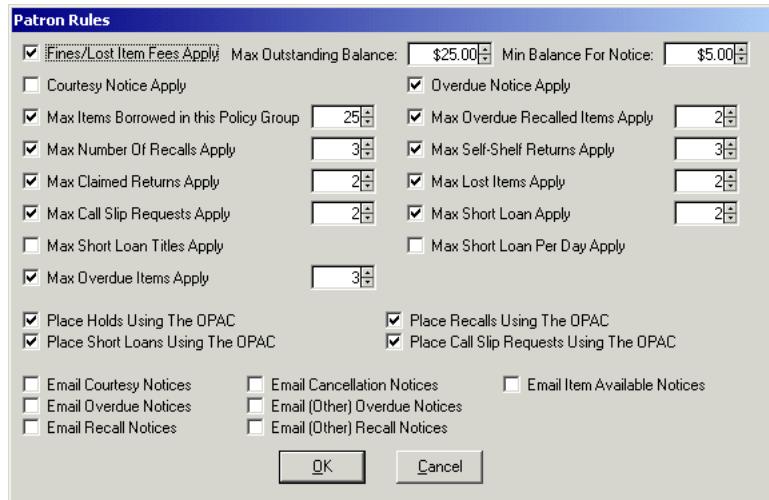
### Self-Shelved Limit

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](#))



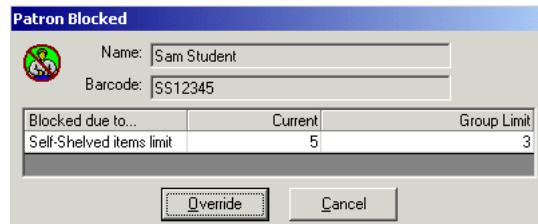
**Figure 6-53. Patron Record Self Shelves**

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](#)).



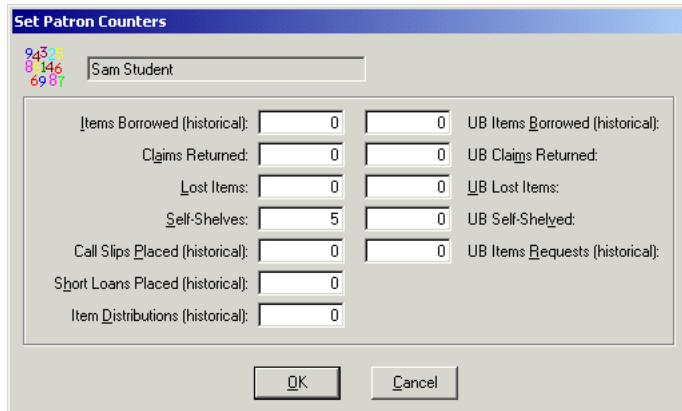
**Figure 6-54. Patron Rules Dialog Box, Max Self-Shelves Returns**

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.



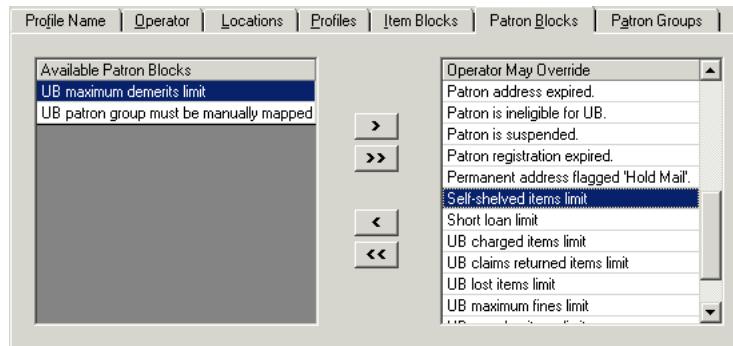
**Figure 6-55. Self-Shelved Items Limit Block Message**

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*, [Setting Patron Counters](#).



**Figure 6-56. Set Patron Counters Dialog Box**

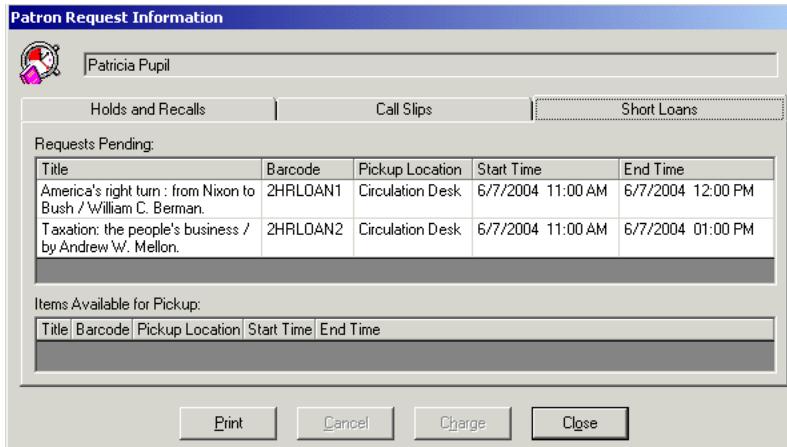
To override this block instead of resolving it, the operator must have Self-shelved items limit in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-57](#)).



**Figure 6-57. Self-shelved Items Limit Override Ability**

### Short Loan Limit

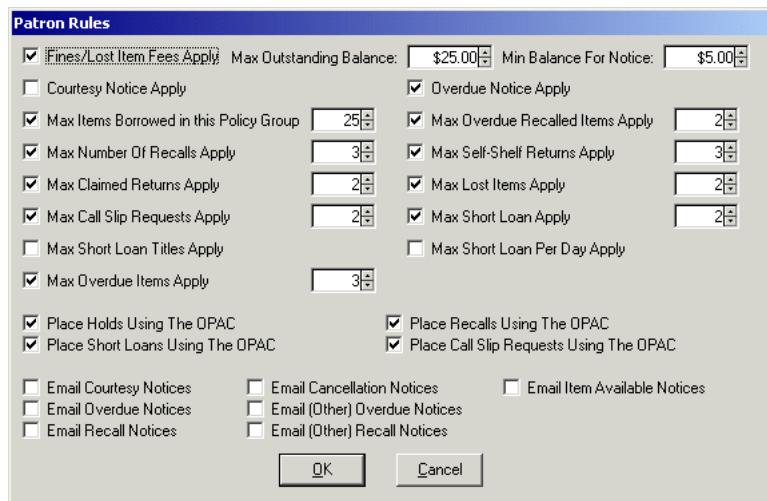
The system compares the patron's current number of pending short loans to any of the patron's patron group limits. To determine the number of short loan requests made by the patron, access the **Patron Request Information** dialog box ([Figure 6-58](#)).



**Figure 6-58. Patron Request Information Dialog Box, Short Loans Tab**

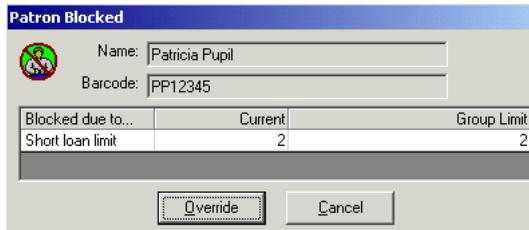
For the selected patron group ([Figure 6-59](#)), the limits for short loans are defined in the **Max Short Loan Apply**, **Max Short Loan Titles Apply**, and **Max Short Loan per Day Apply** fields, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab.

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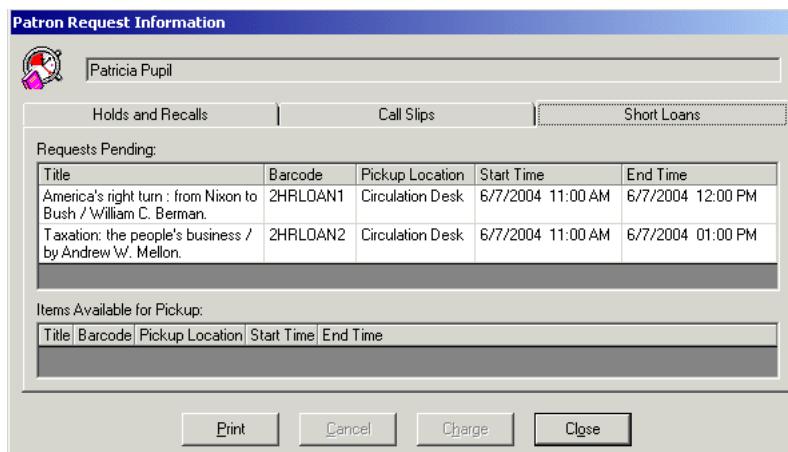
**Figure 6-59. Patron Rules Dialog Box, Short Loan Numerical Limits**

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.



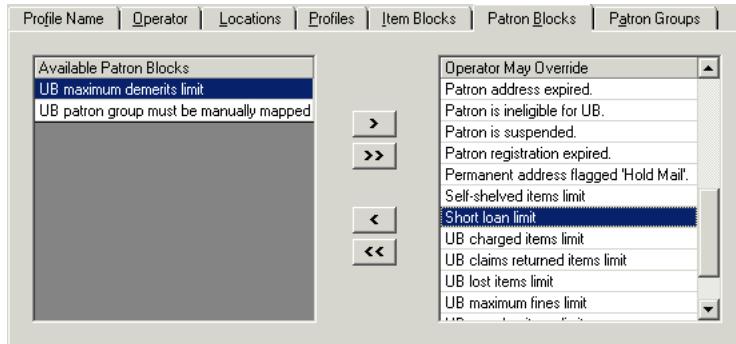
**Figure 6-60. Short Loan Limit Block Message**

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*, [Patron Request Information](#).



**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](#)).



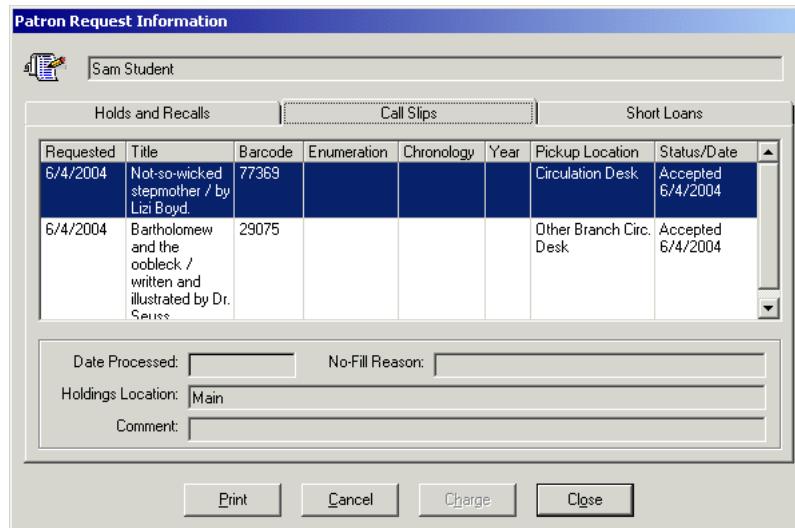
**Figure 6-62. Short Loan Limit Override Ability**

### Callslip Limit

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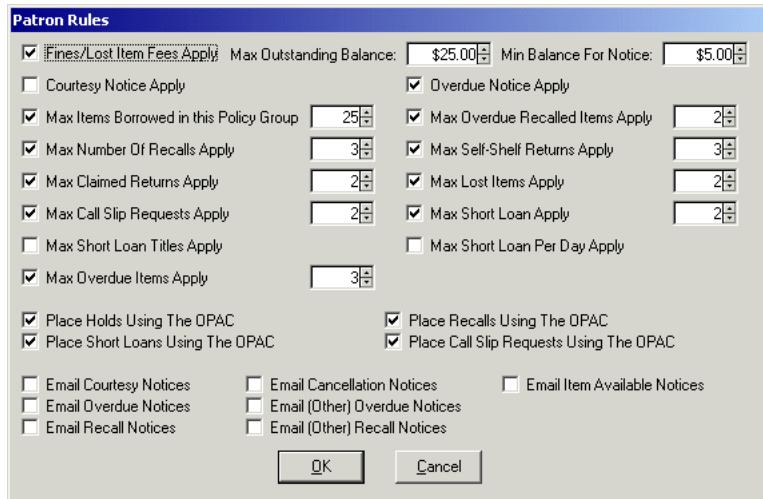
The system compares the patron's current number of pending callslip requests to the patron's patron group limit. To determine the number of callslip requests the patron currently has, access the **Patron Request Information** dialog box ([Figure 6-63](#)).

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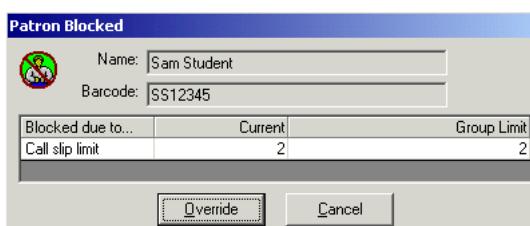
**Figure 6-63. Patron Request Information Dialog Box, Call Slips Tab**

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](#)).



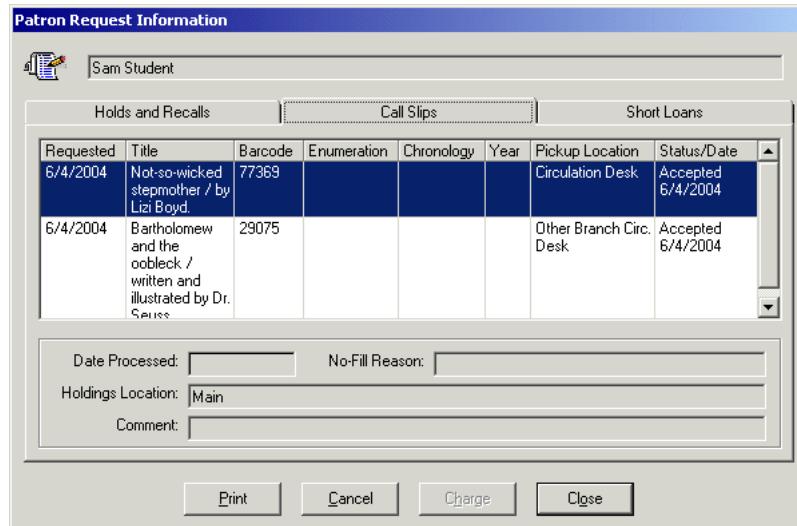
**Figure 6-64. Patron Rules Dialog Box, Max Call Slip Requests Numerical Limit**

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.



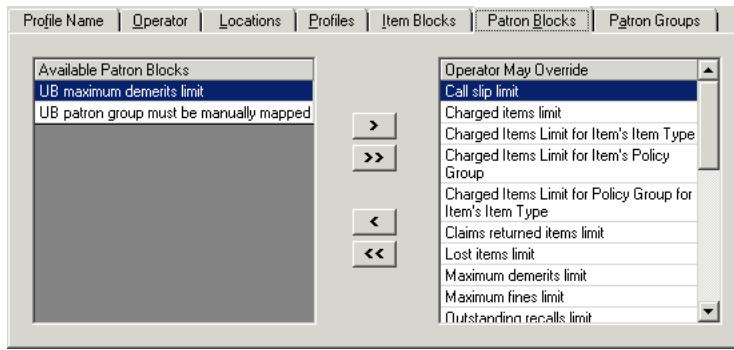
**Figure 6-65. Call Slip Limit Block Message**

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*, see [Patron Request Information](#).



**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](#)).

Last:	GradStudent
First:	Gert
Middle:	
Title:	
Name Type:	Personal
Entered At:	Circulation Desk

1	\$0.00	0/0
0	94325 83346 6987	

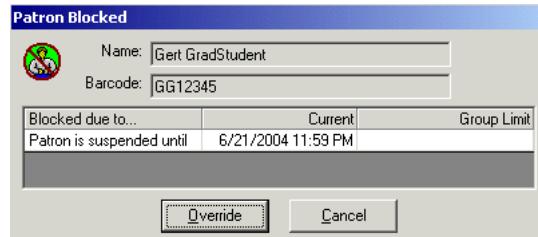
Patron Id	Address/Phone	Counters	Proxy Patrons	History
-----------	---------------	----------	---------------	---------

Registered:			
Created:	5/6/2004	by: demo	at: Circulation Desk
Updated:	5/6/2004	by: demo	at: Circulation Desk
Expires:	5/6/2008		Purge: [ ]
Suspend Until:	6/21/2004		

**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.

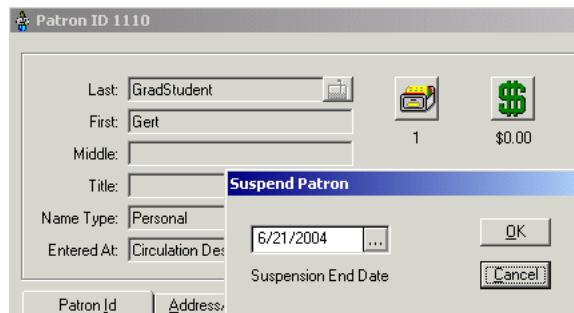
---



**Figure 6-69. Patron is Suspended Block Message**

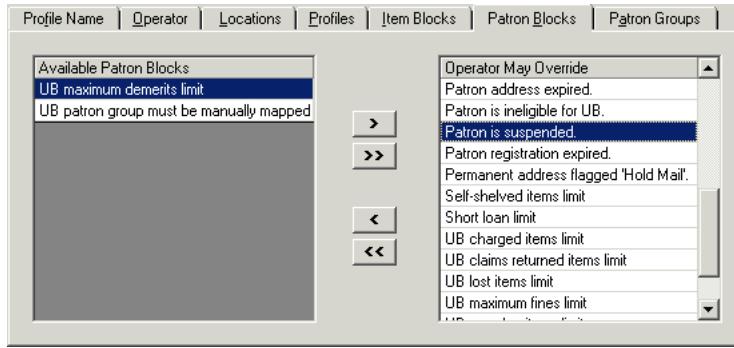
To resolve this block, the circulation operator must change the suspension end date. Use the **Suspend Patron** dialog box ([Figure 6-70](#)) to change the patron's suspension end date. For information on how to edit the suspension end date, see the *Voyager Circulation User's Guide*, [Editing Patron Suspension End Dates](#).

---



**Figure 6-70. Suspend Patron Dialog Box**

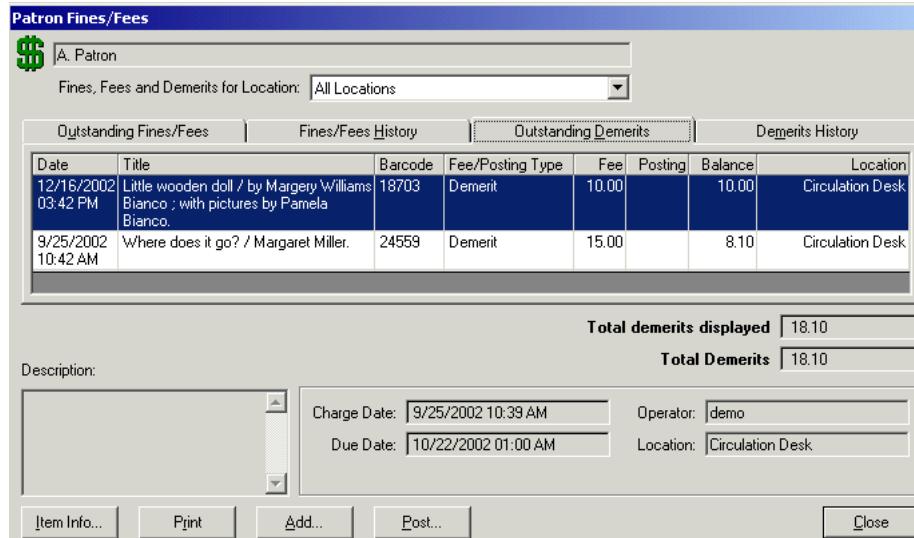
To override this block instead of resolving it, the operator must have Patron is suspended in the **Operator May Override** column on the **Patron Blocks** tab of their Circulation security profile ([Figure 6-71](#)).



**Figure 6-71. Patron Suspension Override Ability**

### **Demerits Limit**

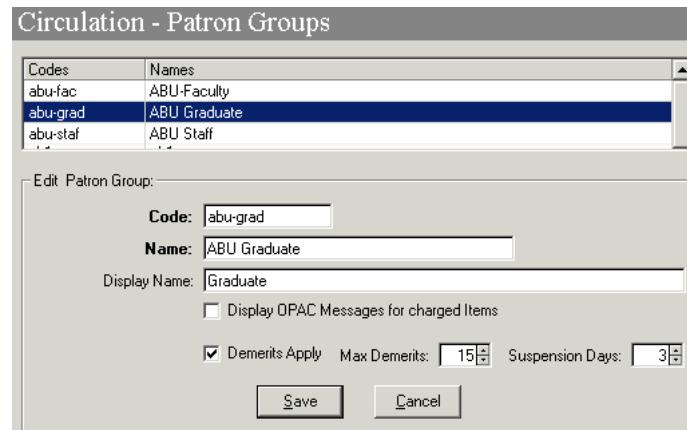
For sites that use demerits instead of fines as a penalty for overdue books, the demerits limit may block a transaction. The system compares the patron's total outstanding demerits balance to the maximum outstanding balance allowed for the patron's patron group. The patron's current outstanding balance displays on the **Patron Fines/Fees** dialog box, **Outstanding Demerits** tab ([Figure 6-72](#)).



**Figure 6-72. Patron Fines/fees Dialog Box, Outstanding Demerits Tab**

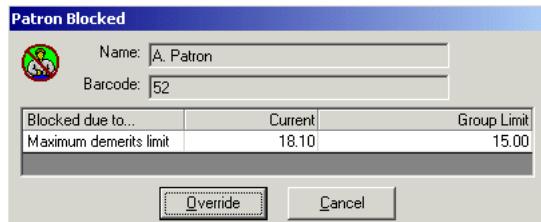
The **Max Demerits** field, on the **Patron Rules** dialog box of the **Circulation - Policy Definitions** workspace, **Patrons** tab for the selected patron group, defines this limit ([Figure 6-73](#)).

---



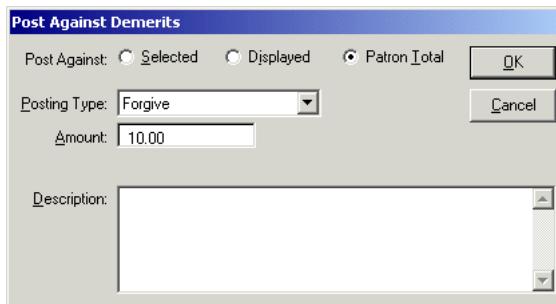
**Figure 6-73. Circulation - Patron Groups, Max Demerits Numerical Limit**

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.



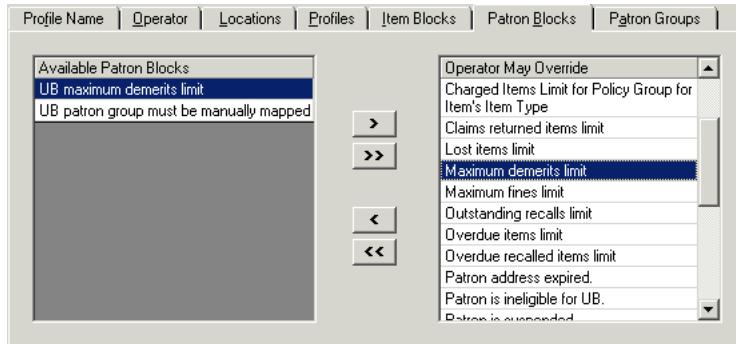
**Figure 6-74. Maximum Demerits Limit Block Message**

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*, [Posting Against Demerits](#).



**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 5-161](#).

Circulation - UB Policy Definitions

UB Eligible	Patron Groups
<input checked="" type="checkbox"/>	Faculty
<input checked="" type="checkbox"/>	Graduate Student
<input checked="" type="checkbox"/>	Inter-Library Loan
<input checked="" type="checkbox"/>	Staff

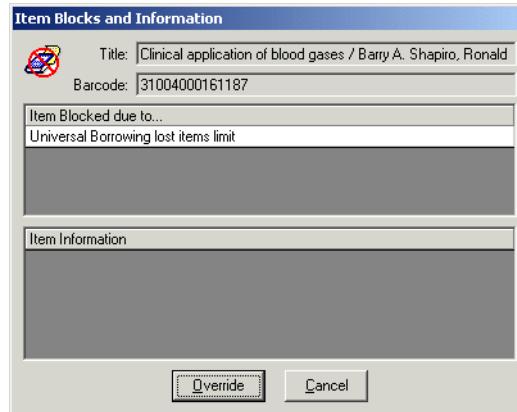
Edit UB Policy Definition:

<input checked="" type="checkbox"/> UB Eligible	\$10.00	Max Outstanding Balance
<input type="checkbox"/> Max UB Demerits Apply	0	Max Demerits
<input checked="" type="checkbox"/> Max UB Items Borrowed Apply	5	Max Item Borrowed
<input checked="" type="checkbox"/> Max UB Overdue Items Apply	5	Max Overdue Items
<input checked="" type="checkbox"/> Max UB Overdue Recalled Items Apply	3	Max Overdue Recalled Items
<input checked="" type="checkbox"/> Max UB Self-Shelf Returns Apply	3	Max Self-Shelf Returns
<input checked="" type="checkbox"/> Max UB Claimed Returns Apply	3	Max Claimed Returns
<input checked="" type="checkbox"/> Max UB Lost Items Apply	3	Max Lost Items
<input checked="" type="checkbox"/> Max UB Requests Apply	10	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.

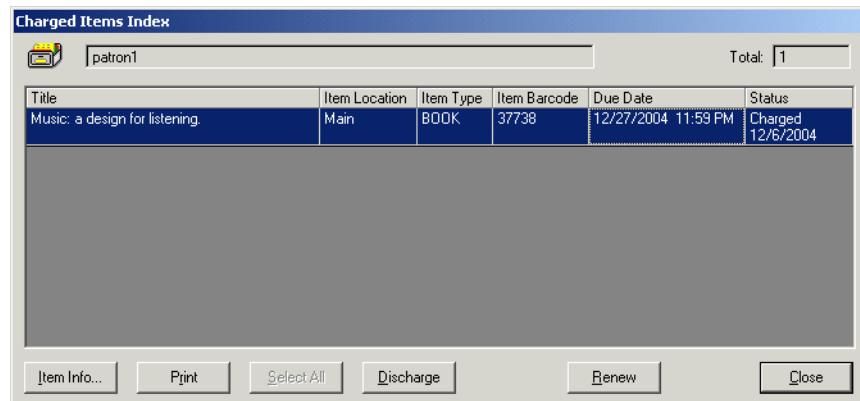


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**Figure 6-78. UB Lost Items Limit Block Message**

To resolve the various UB blocks:

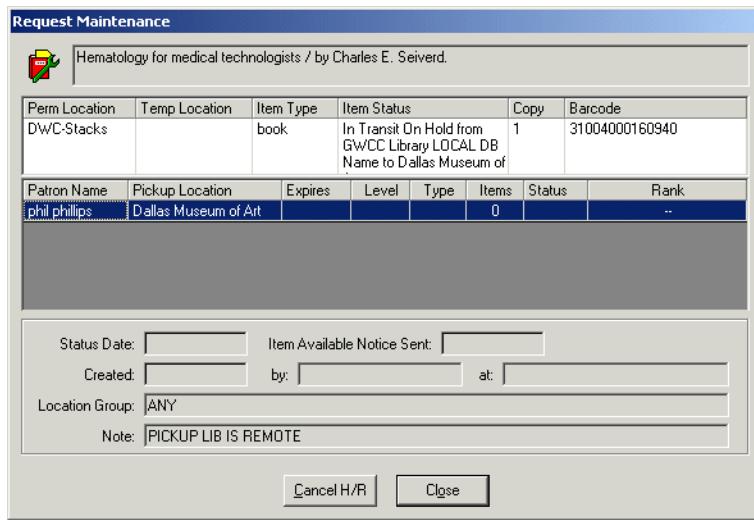
- If the block is
  - related to overdue UB items, discharge the appropriate items from the **Charged Items Index** dialog box ([Figure 6-79](#)).



---

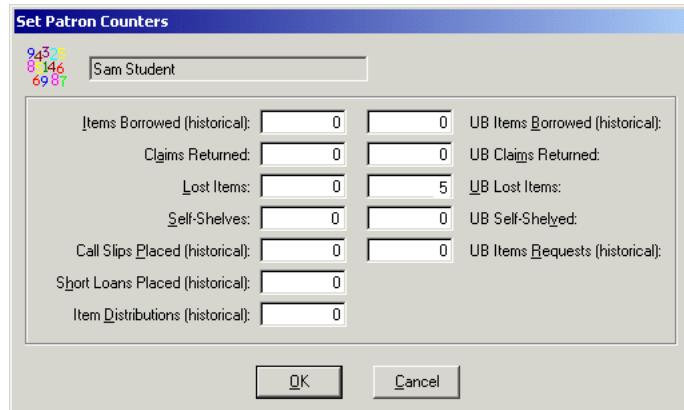
**Figure 6-79. Charged Items Index Dialog Box**

- related to requests, cancel the appropriate requests from the **Request Maintenance** dialog box ([Figure 6-80](#))



**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](#)).

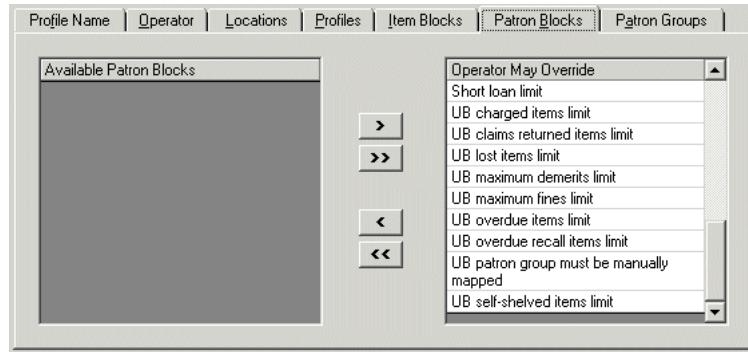


**Figure 6-81. UB Lost Items Numerical Limit**

For more information see the *Voyager Universal Borrowing User's Guide*, the *Voyager Circulation User Guide's Charged Items Index* and *Request Maintenance Dialog Box* sections, 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](#)).

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**Figure 6-82. UB Limits Override Ability**

## Item Blocks

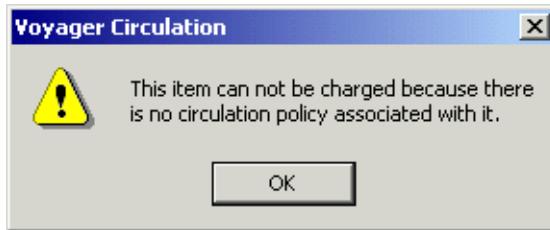
---

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 message displays (Figure 6-83).*



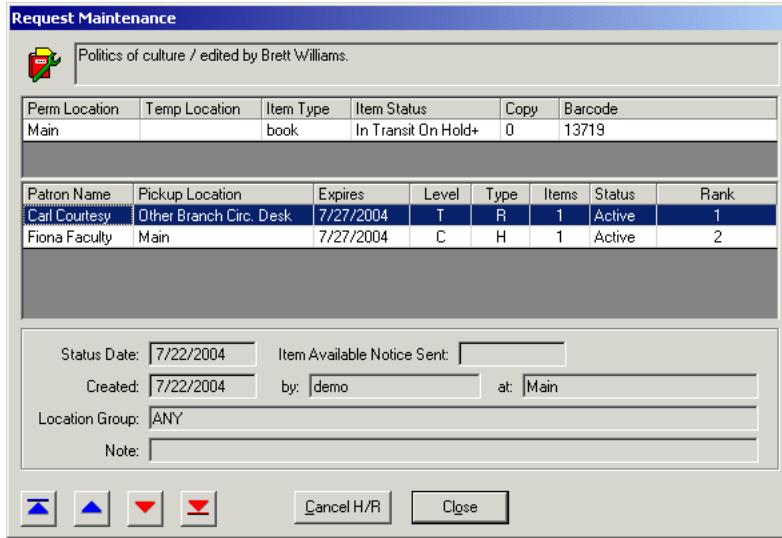
**Figure 6-83. Warning Message**

### **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:**

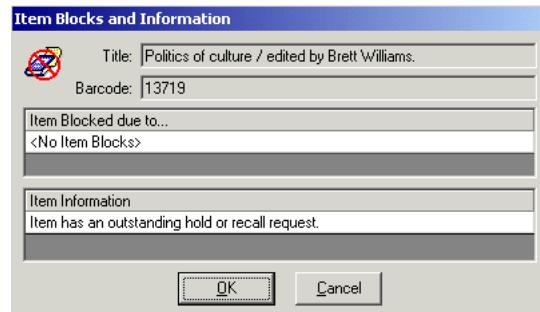
The type of request is displayed in the **Type** column. R corresponds to Recall requests, H to Hold requests.



**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.

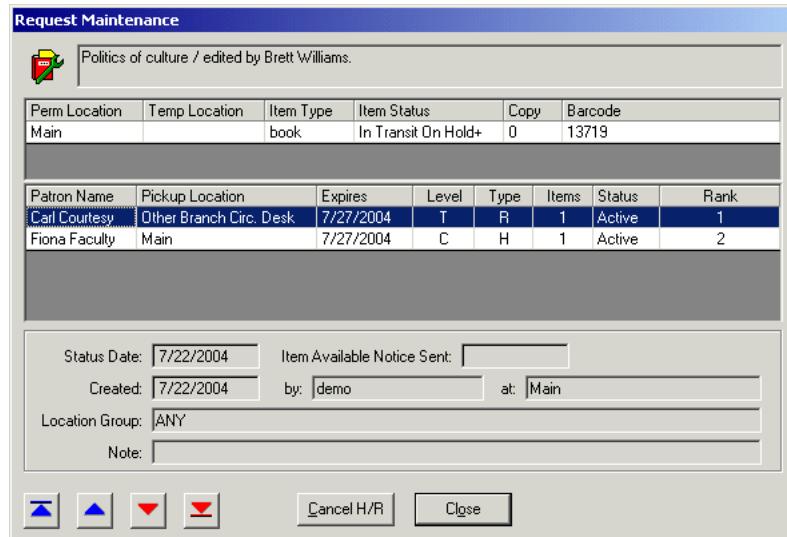
---



**Figure 6-85. Item has an Outstanding Hold or Recall Message**

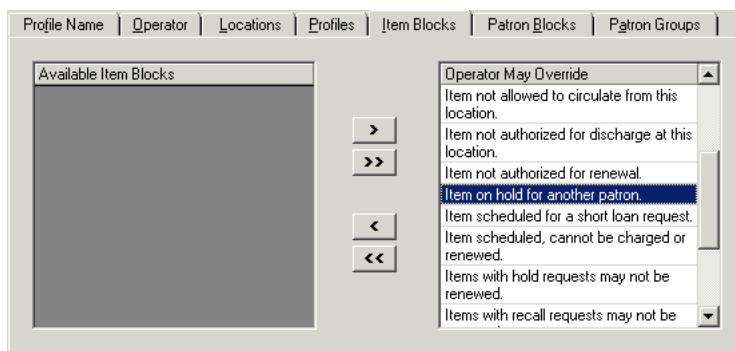
Since this is not a block, but only an informational message, there is no override necessary. Clicking the **OK** button acknowledges the message, and then completes the charge transaction.

To eliminate the message, operators can cancel any pending hold requests ([Figure 6-86](#)). For information on how to cancel requests, see the *Voyager Circulation User's Guide, Request Maintenance Dialog Box* section.



**Figure 6-86. Item Request Maintenance Dialog Box**

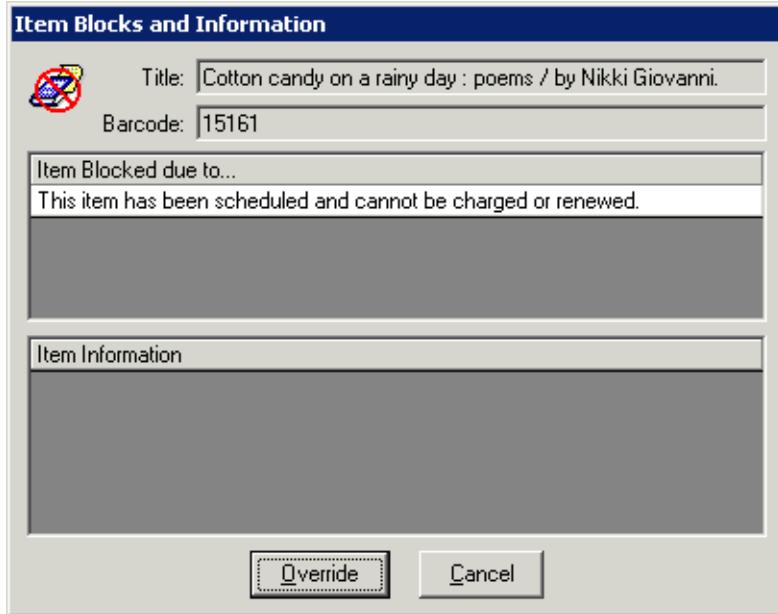
To override this block instead of resolving it, the operator must have Item on hold for another patron in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-87](#)).



**Figure 6-87. Item on Hold for Another Patron Override Ability**

### Item Scheduled (Media)

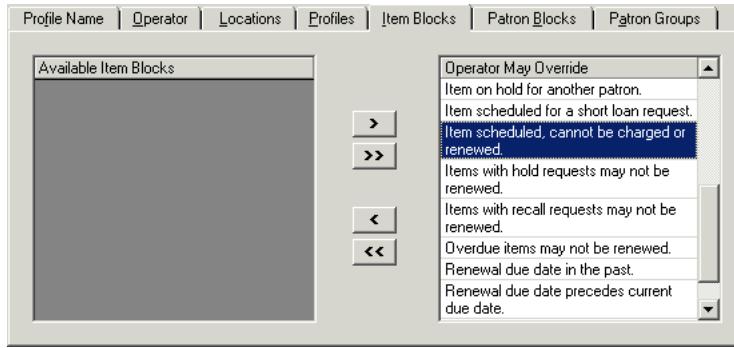
When a charge or renew is attempted on an item that has been scheduled via the Media Scheduling module, the item has been scheduled and cannot be charged or renewed block message displays ([Figure 6-88](#)).



**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*.

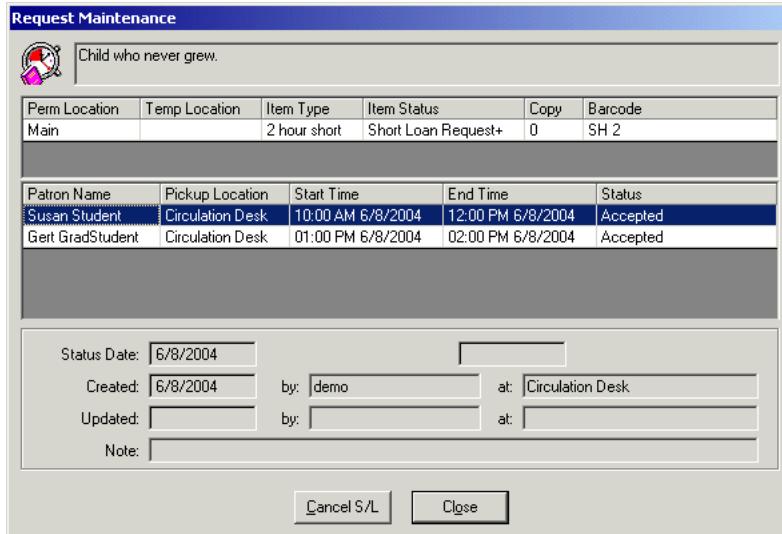
To override this block instead of resolving it, the operator must have Item scheduled, cannot be charged or renewed in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-89](#)).



**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](#)).



**Figure 6-90. Request Maintenance Dialog Box Short Loan Requests**

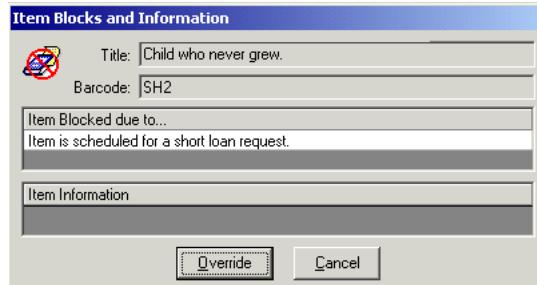
Operators can also access the **Short Loan** dialog box to view active short loans ([Figure 6-91](#)).

---



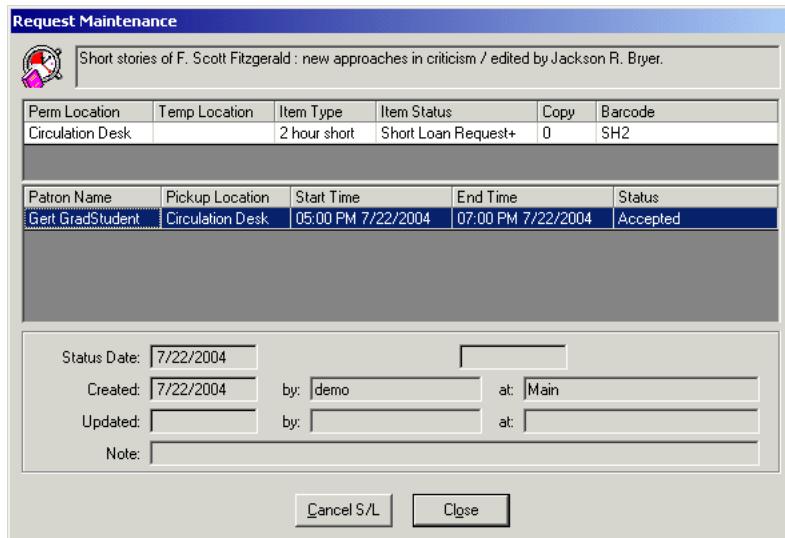
**Figure 6-91. Short Loan Dialog Box**

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 [Short Loan Maintenance](#) in 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](#)).

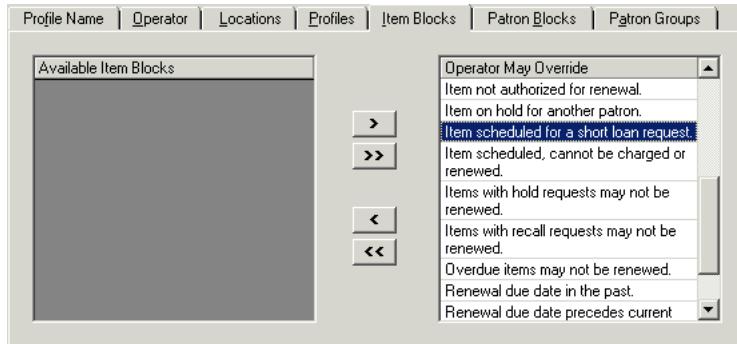


Figure 6-94. Item Scheduled for Short Loan Request Override Ability

### Callslip by Others

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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](#)).

---

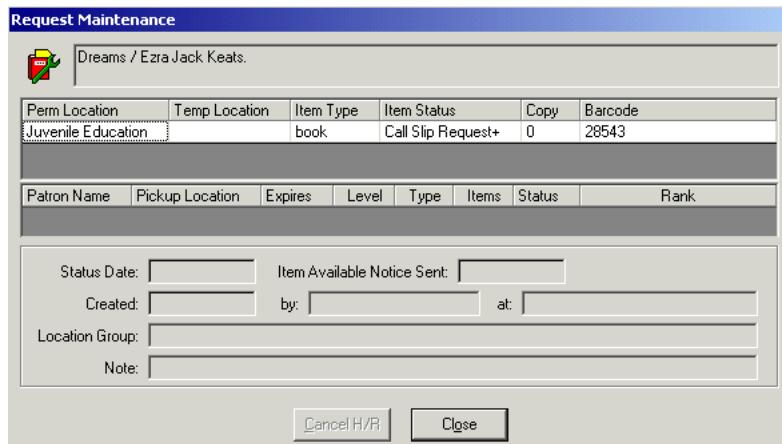
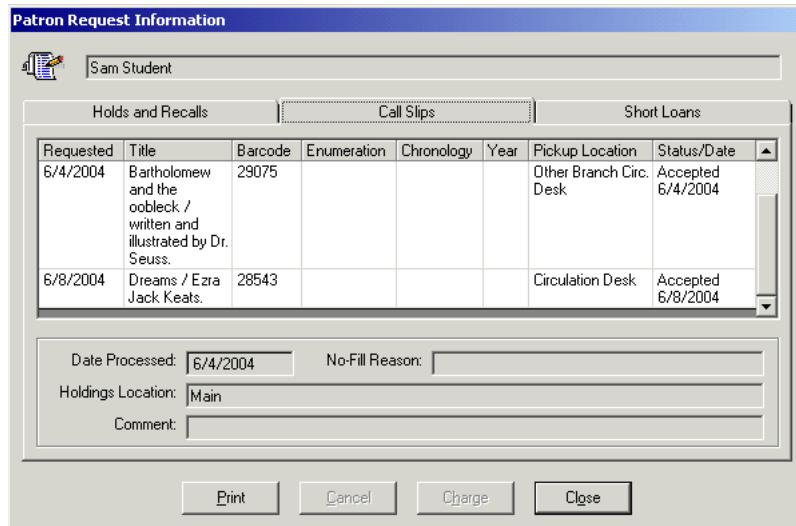


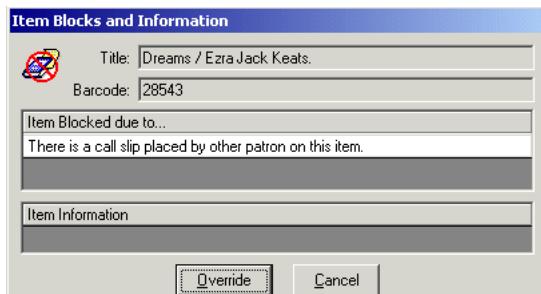
Figure 6-95. Request Maintenance Dialog Box Call Slip Request

Operators can also access the **Patron Request** dialog box to view active call slips ([Figure 6-96](#)).



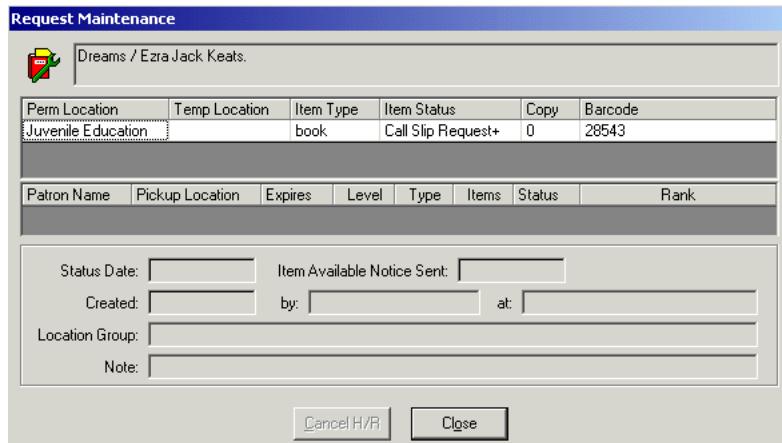
**Figure 6-96. Patron Request Information Dialog Box, Call Slips Tab**

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.



**Figure 6-97. There is a Call Slip Placed by Other Patron on the Item Block Message**

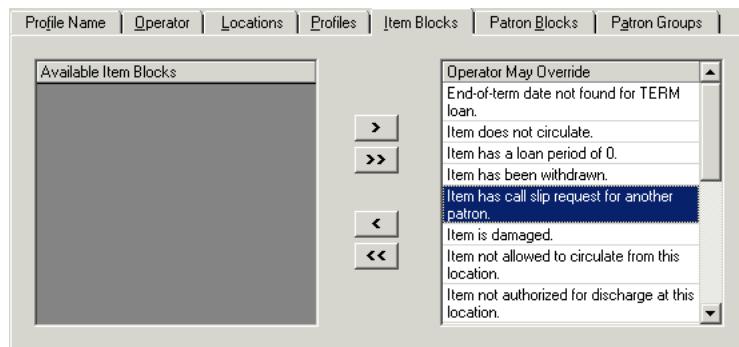
To resolve this block, an operator can cancel the call slip request from the **Request Maintenance** dialog box ([Figure 6-98](#)). For information on canceling the call slip, see the *Voyager Circulation User's Guide*, [Request Maintenance Dialog Box](#).



**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](#)).

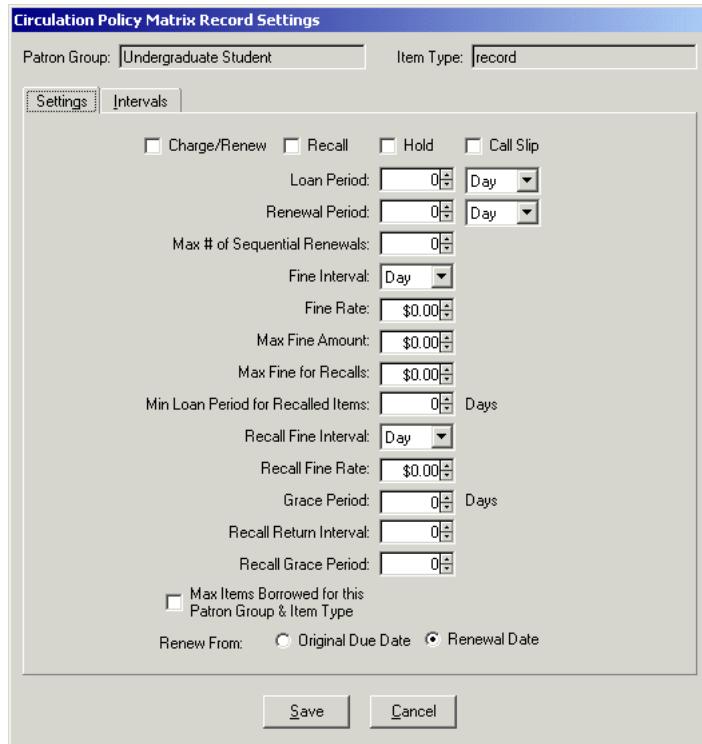
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**Figure 6-99.** Item has Call Slip Request for Another Patron Override Ability

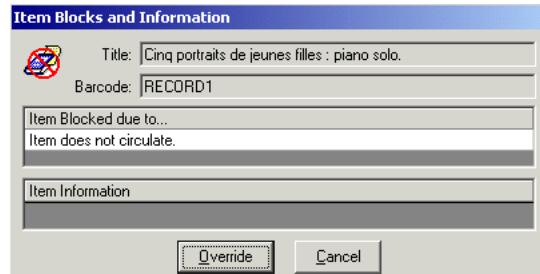
## Non-Circulating Item

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.

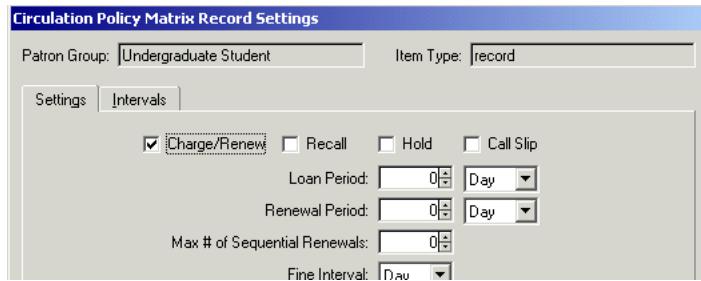


---

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*, [Circulation Policy Matrix](#).

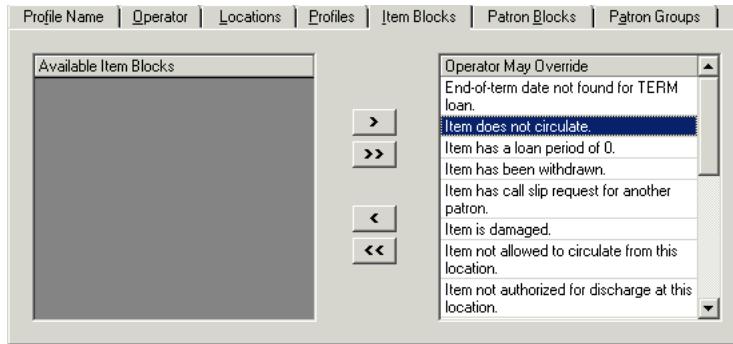
---



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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](#)).

The screenshot shows a software window for setting circulation policies. At the top, it displays 'Patron Group: Courtesy Patron' and 'Item Type: audiotape'. Below this, there are two tabs: 'Settings' (selected) and 'Intervals'. Under the 'Settings' tab, several options are available:

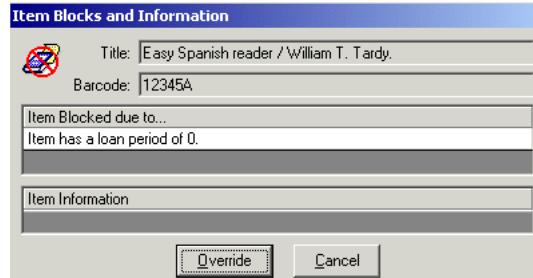
- Charge/Renew  Recall  Hold  Call Slip
- Loan Period:  Day
- Renewal Period:  Day
- Max # of Sequential Renewals:
- Fine Interval: Day
- Fine Rate: \$0.15
- Max Fine Amount: \$0.01
- Max Fine for Recalls: \$10.10
- Min Loan Period for Recalled Items:  Days
- Recall Fine Interval: Day
- Recall Fine Rate: \$0.25
- Grace Period:  Days
- Recall Return Interval:  Days
- Recall Grace Period:  Days
- Max Items Borrowed for this Patron Group & Item Type

At the bottom of the window, there are three radio buttons: 'Renew From:' (unchecked), 'Original Due Date' (radio button checked), and 'Renewal Date' (radio button checked).

**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.

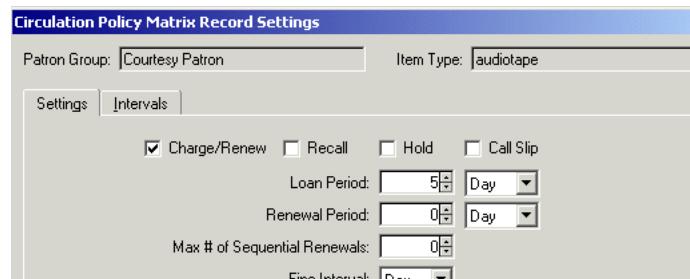
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**Figure 6-105.** Loan Period of 0 Item Block Message

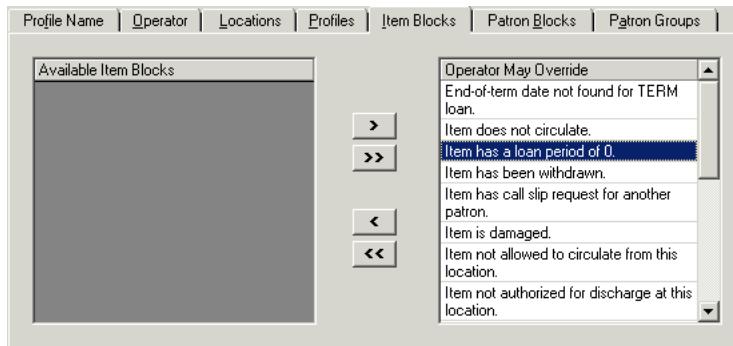
To resolve this block, administrators can increase the value of the loan period for the patron group-item type ([Figure 6-106](#)). For information on configuring the circulation matrix, see the *Voyager System Administration User's Guide*, [Circulation Policy Matrix](#).

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**Figure 6-106.** Loan Period Value Increased to Five

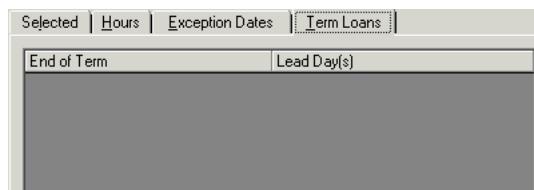
To override this block instead of resolving it, the operator must have Item has a loan period of 0 in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-107](#)).



**Figure 6-107. Item has a Loan Period of 0 Override Ability**

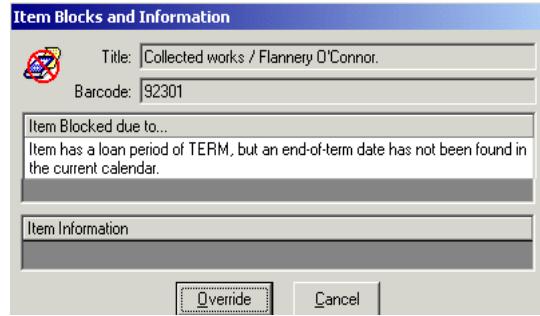
### Term Due Date Not Found

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.



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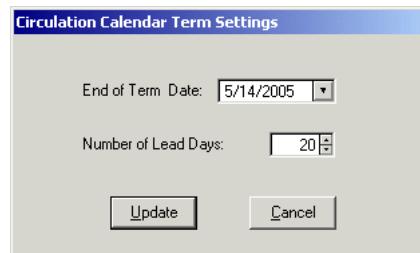
**Figure 6-109. No End-of-Term Date Block Message**

**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](#).

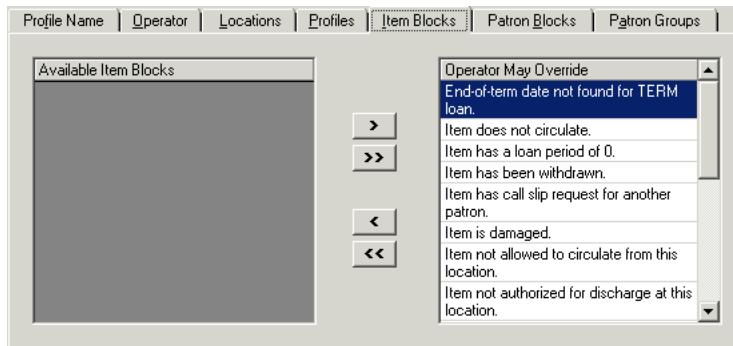
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**Figure 6-110. Circulation Calendar Term Settings Dialog Box**

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**

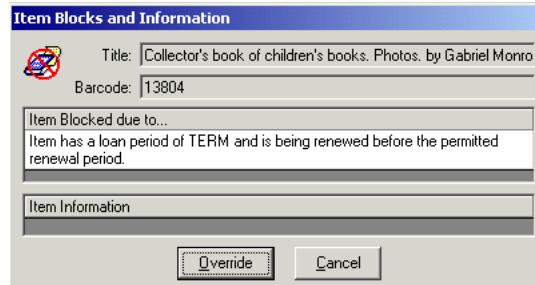
### Out of Phase Term Renewal

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
			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.

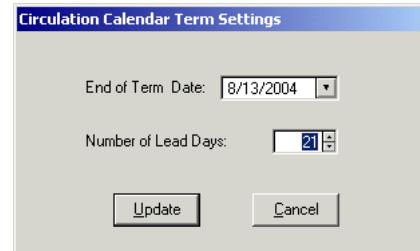


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**Figure 6-113. TERM Renewal Precedes Permitted Renewal Period Block Message**

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 5-19](#).

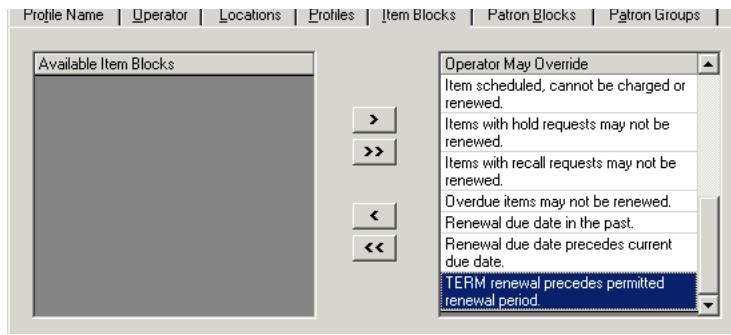
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**Figure 6-114. Increase the Number of Lead Days**

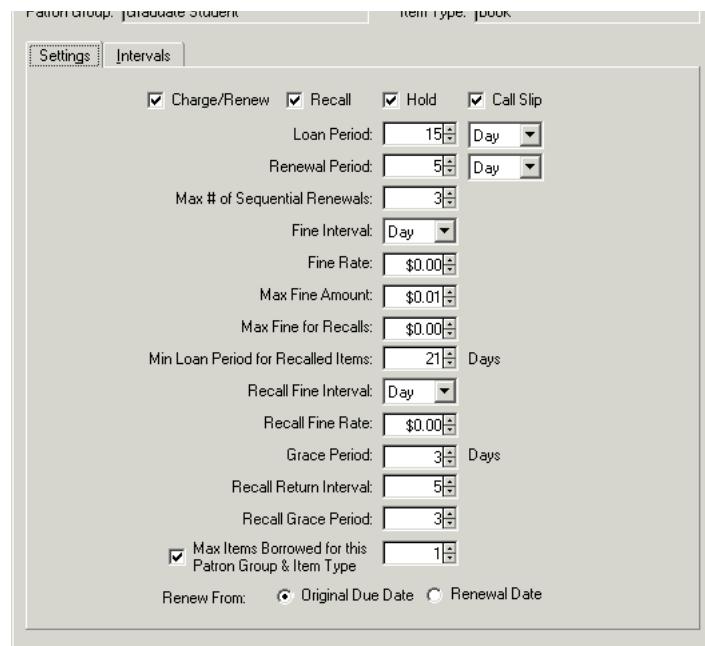
To override this block instead of resolving it, the operator must have TERM renewal precedes permitted renewal period in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-115](#)).



**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](#)).

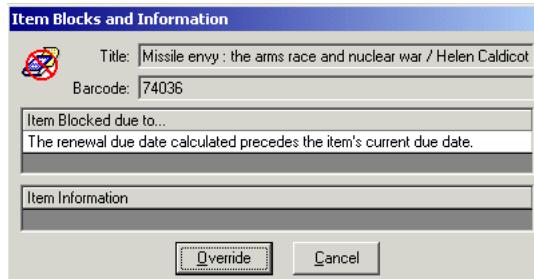


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**Figure 6-116. Circulation Policy Matrix Record Settings Dialog Box**

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.

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**Figure 6-117. Item Block****NOTE:**

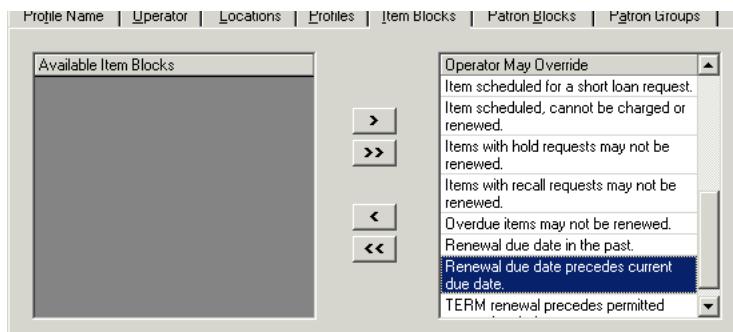
No exception is logged in this situation.

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*, [Circulation Policy Matrix](#).

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**Figure 6-118. New Value in the Renewal Period Field**

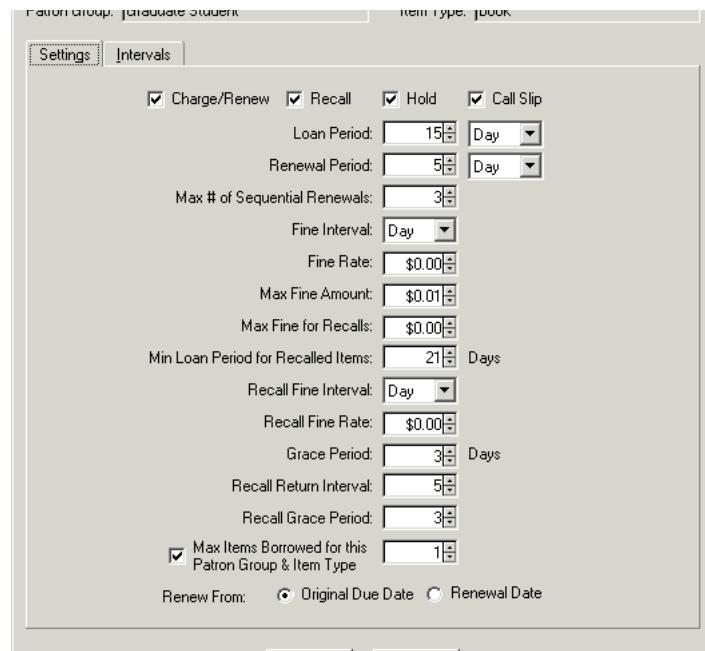
To override this block instead of resolving it, the operator must have **Renewal due date precedes current due date** in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-119](#)).



**Figure 6-119. Renewal Due Date Precedes Current Due Date Override Ability**

### New Due Date in Past

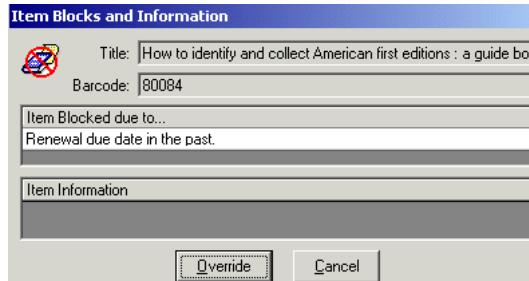
When renewing an item, the system calculates a new due date for the specific patron group-item type combination using the value in the **Renewal period** field and the selected **Renew From** radio button on the **Circulation Policy Matrix Record Settings** dialog box accessed from the **Matrix** tab (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.

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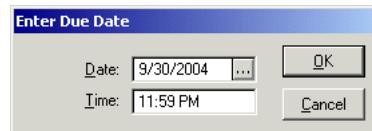
**Figure 6-121. Renewal Due Date in the Past Block Message**

**NOTE:**

No exception is logged in this situation.

To resolve this block, administrators can enter/modify the due date ([Figure 6-122](#)).

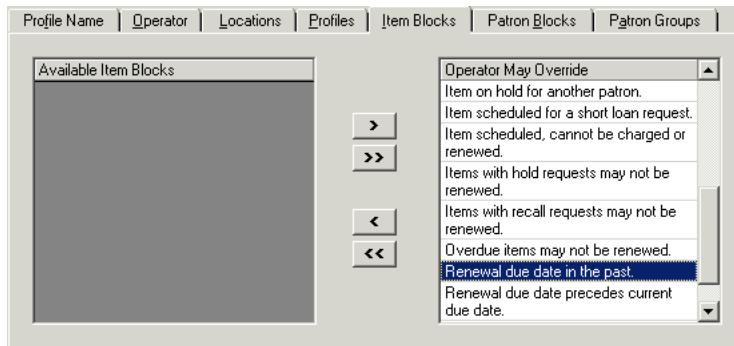
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**Figure 6-122. Enter Due Date Dialog Box**

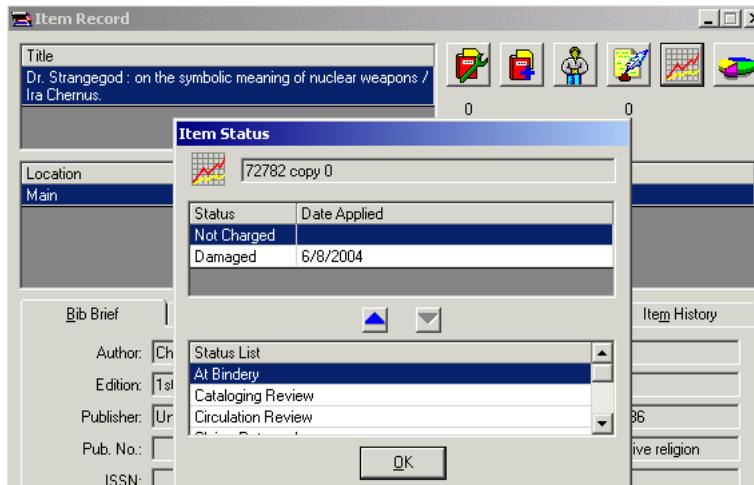
To override this block instead of resolving it, the operator must have Renewal due date in the past in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-123](#)).



**Figure 6-123. Renewal Due Date in the Past Override Ability**

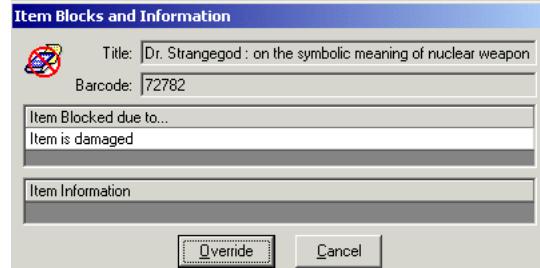
### Damaged Item

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.



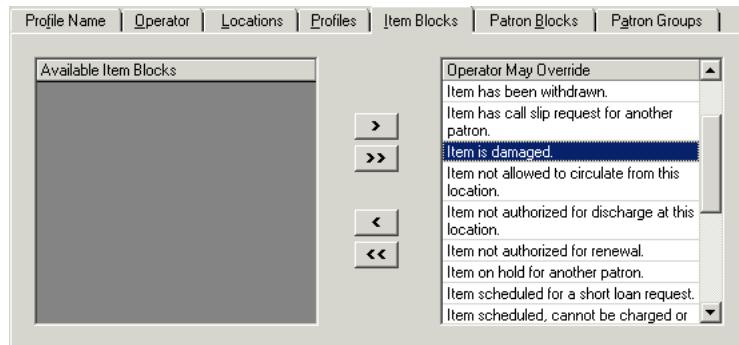
---

**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*, [Item Status Dialog Box](#).

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](#)).

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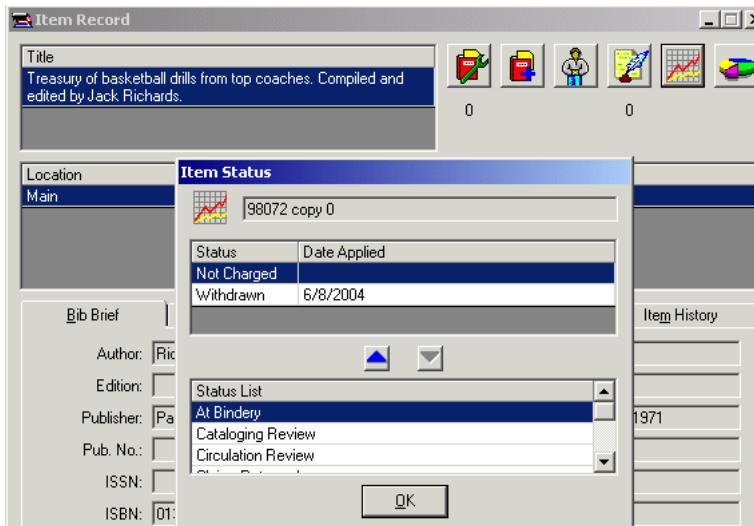


---

**Figure 6-126.** Item is Damaged Override Ability

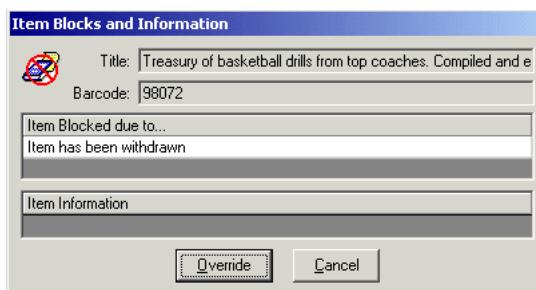
## **Withdrawn Item**

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.



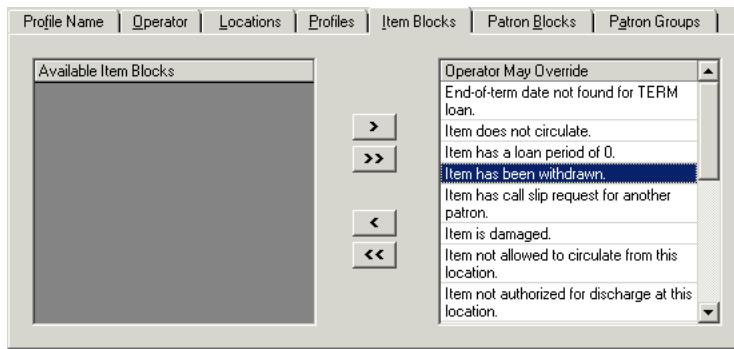
**Figure 6-128.** Item has been Withdrawn Block Message

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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*, [Item Status Dialog Box](#).

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](#)).

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**Figure 6-129. Item is Withdrawn Override Ability**

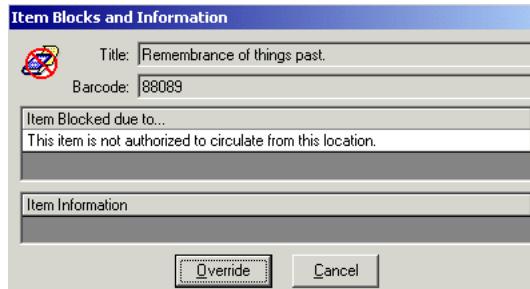
### Foreign Item Location

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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.

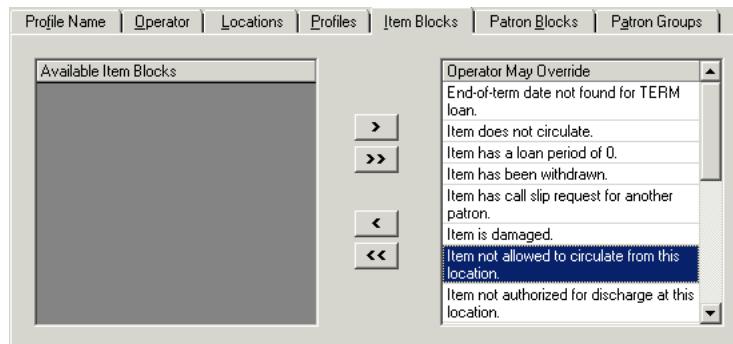
[Figure 6-125](#) shows the **This item is not authorized to circulate from this location** block message.



**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.

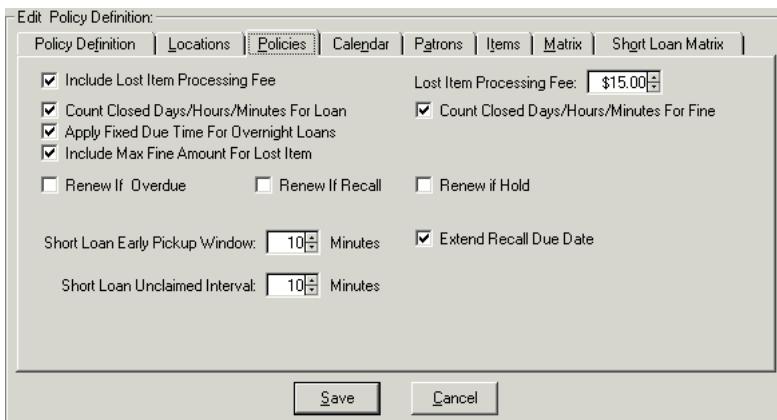
To override this block, the operator must have Item not allowed to circulate from this location in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-131](#)).



**Figure 6-131. Item Not Allowed to Circulate from this Location Override Ability**

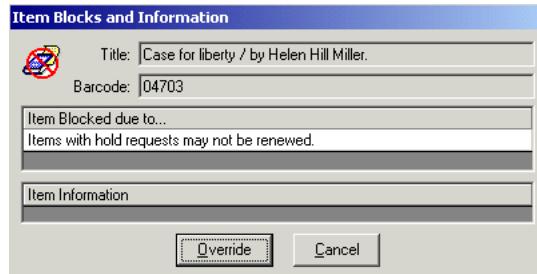
## Renewal with Hold Request

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](#)).



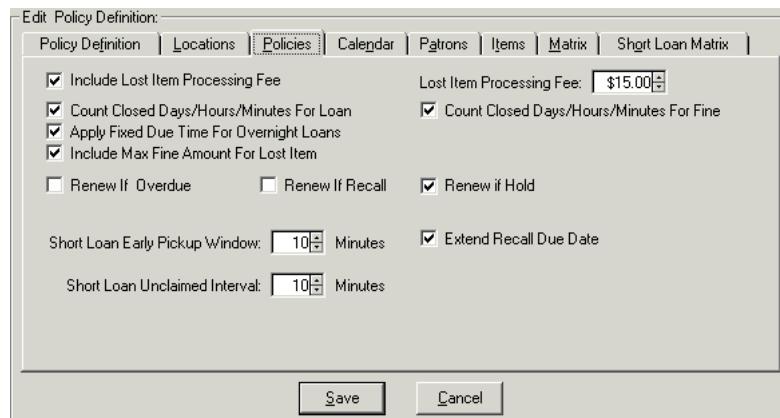
**Figure 6-132.** Policies tab, Renew if Hold Check Box

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.



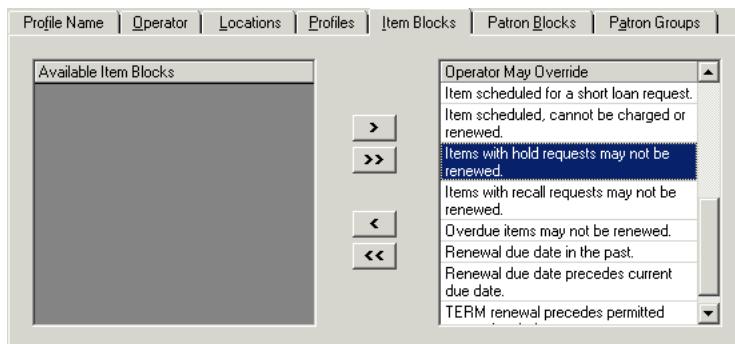
**Figure 6-133.** Items with Hold Requests may not be Renewed Block Message

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*.



**Figure 6-134. Policies Tab, Renew if Hold Check Box Selected**

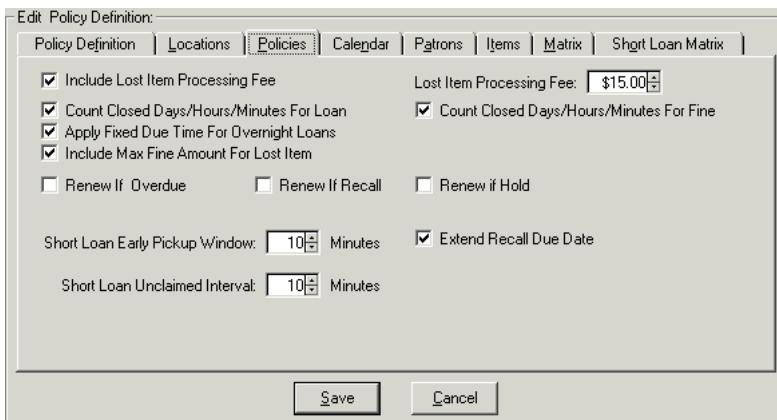
To override this block instead of resolving it, the operator must have Items with hold requests may not be renewed in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-135](#)).



**Figure 6-135. Items with Hold Requests may not be Renewed Override Ability**

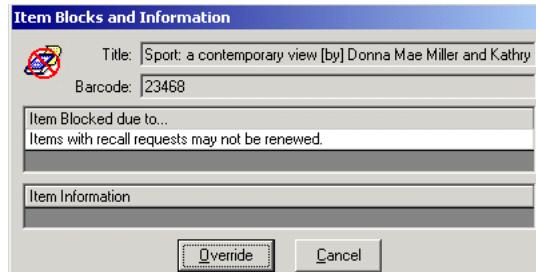
## Renewal with Recall Request

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](#)).



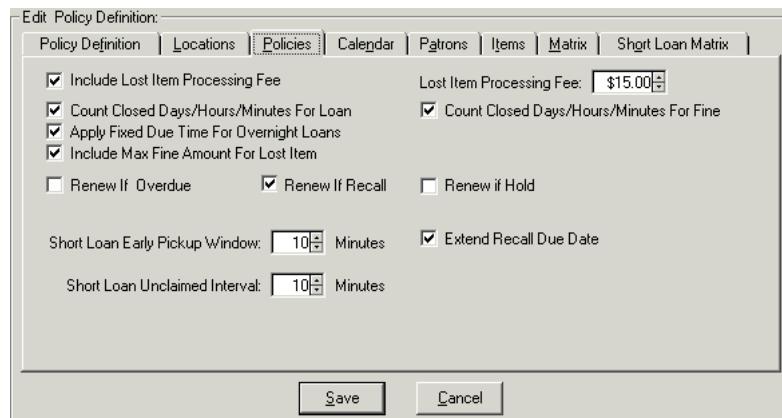
**Figure 6-136. Policies Tab, Renew If Recall Check Box**

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.



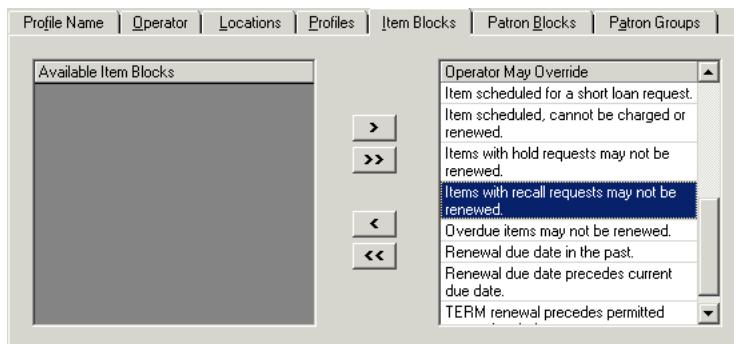
**Figure 6-137. Items with Recall Requests may not be Renewed Block Message**

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*.



**Figure 6-138. Policies Tab, Renew If Recall Check Box Selected**

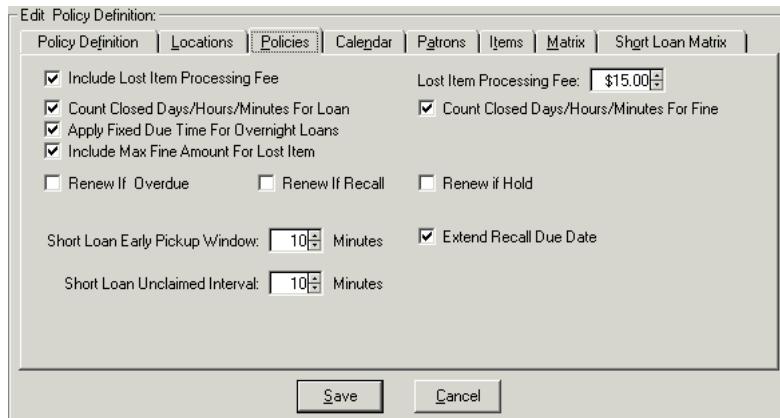
To override this block instead of resolving it, the operator must have Items with recall requests may not be renewed in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile (Figure 6-139).



**Figure 6-139. Items with Recall Requests may not be Renewed Override Ability**

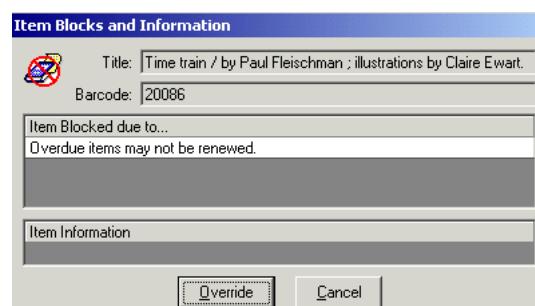
## Renewal with Overdue Status

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](#)).



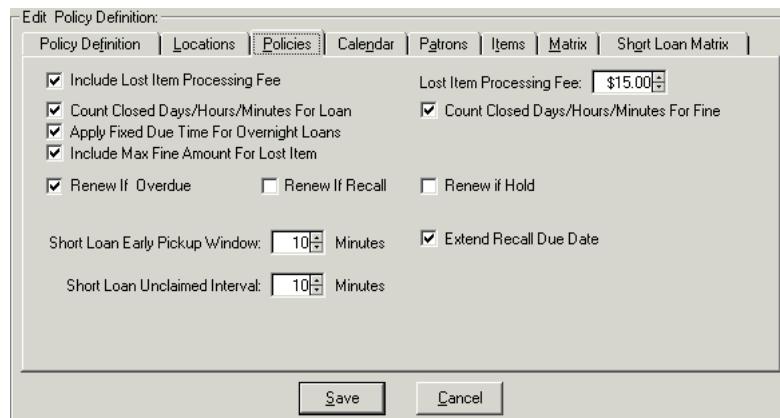
**Figure 6-140.** Policies Tab, Renew if Overdue Check Box

The block condition arises if the renewal is not allowed. [Figure 6-141](#) shows the Overdue items may not be renewed block message.



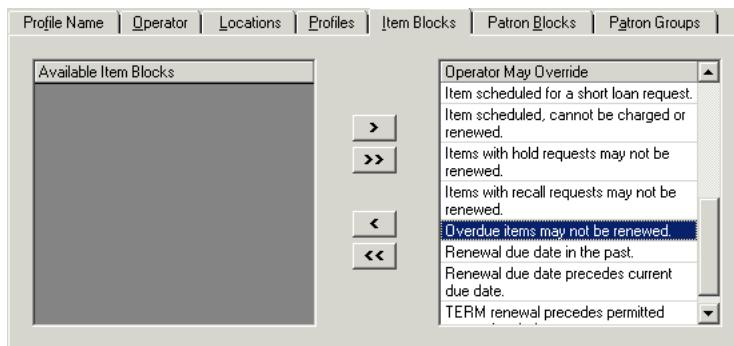
**Figure 6-141.** Overdue Items may not be Renewed Block Message

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. Policies Tab, Renew if Overdue Check Box Selected**

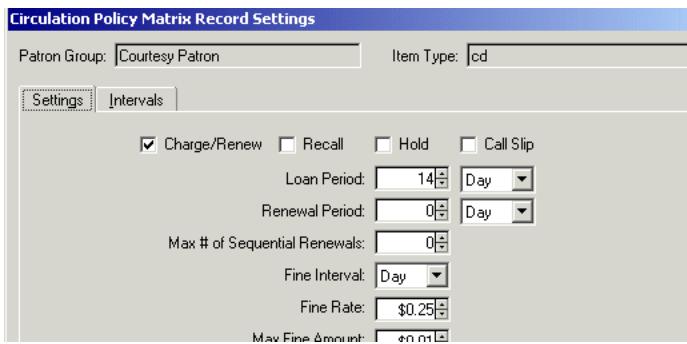
To override this block instead of resolving it, the operator must have Overdue items may not be renewed in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile (Figure 6-143).



**Figure 6-143. Overdue Items may not be Renewed Override Ability**

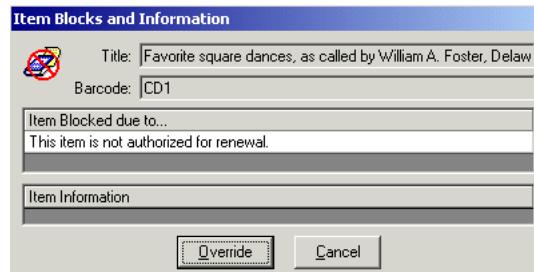
## Non-renewable Item

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](#)).



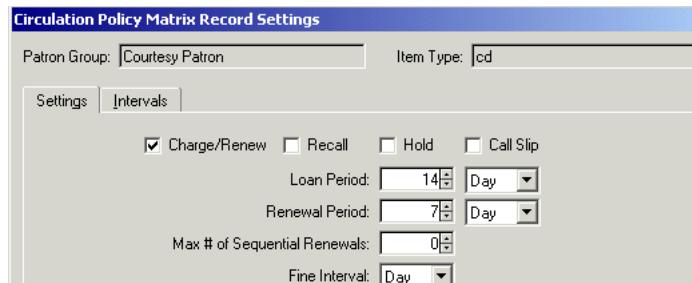
**Figure 6-144.** Circulation Policy Matrix Record Settings

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** message.



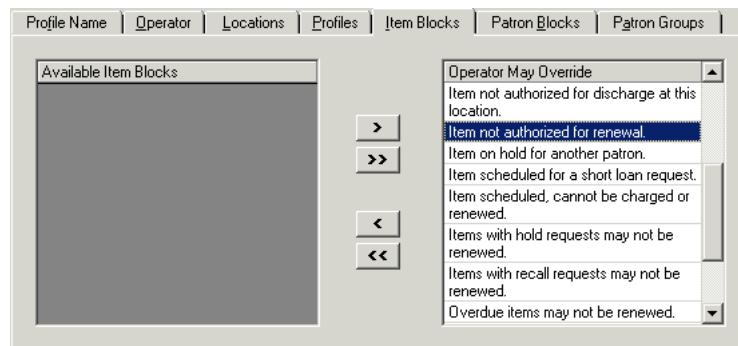
**Figure 6-145.** This Item Not Authorized for Renewal Block Message

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*, [Circulation Policy Matrix](#).



**Figure 6-146.** Renewal Period Greater Than Zero

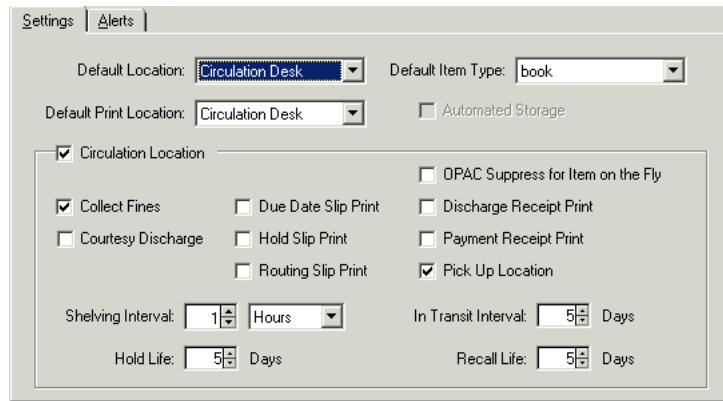
To override this block instead of resolving it, the operator must have Item not authorized for renewal in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-147](#)).



**Figure 6-147.** Item Not Authorized for Renewal Override Ability

## No Courtesy Discharge

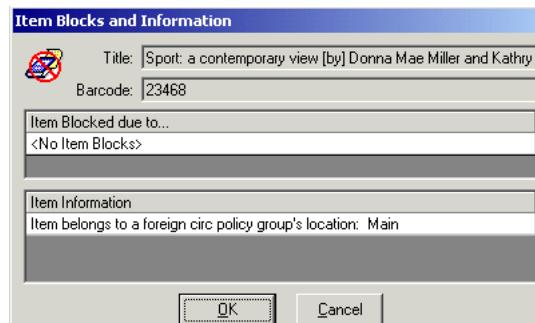
When discharging an item at a circulation happening location that belongs to a circulation policy group other than the circulation policy group to which the item belongs, the system determines if the discharge is allowed. The system selects a circulation location from the item's circulation policy group 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](#)).



**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.

---



**Figure 6-149. Item Belongs to a Foreign Circ Policy Group's Location Message**

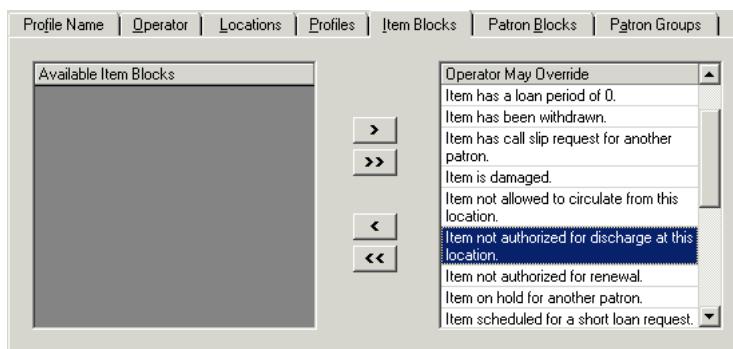
If the discharge is not allowed (that is the **Courtesy Discharge** check box is not selected), the block condition arises ([Figure 6-150](#)).



**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 5-57](#).

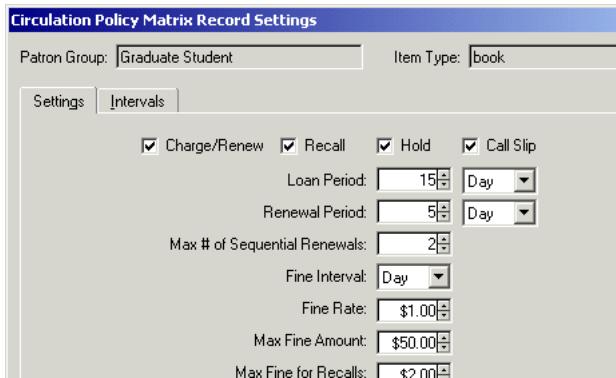
To override this block instead of resolving it, the operator must have Item not authorized for discharge at this location in the **Operator May Override** column on the **Item Blocks** tab of their Circulation security profile ([Figure 6-151](#)).



**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](#)).



**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.



**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*, [Circulation Policy Matrix](#).

**Circulation Policy Matrix Record Settings**

Patron Group: Graduate Student      Item Type: book

Settings Intervals

Charge/Renew     Recall     Hold     Call Slip  
 Loan Period:  Day      
 Renewal Period:  Day      
 Max # of Sequential Renewals:    
 Fine Interval:    
 Fine Rate:    
 Max Fine Amount:    
 Max Fine for Recalls:

**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](#)).

Profile Name	Operator	Locations	Profiles	Item Blocks	Patron Blocks	Patron Groups
<div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> <p><b>Available Item Blocks</b></p> <div style="border: 1px solid #ccc; padding: 5px; height: 150px;"></div> </div> <div style="flex: 1;"> <p><b>Operator May Override</b></p> <ul style="list-style-type: none"> <li>End-of-term date not found for TERM loan.</li> <li>Item does not circulate.</li> <li>Item has a loan period of 0.</li> <li>Item has been withdrawn.</li> <li>Item has call slip request for another patron.</li> <li><b>Item is at renewal limit.</b></li> <li>Item is damaged.</li> <li>Item not allowed to circulate from this location.</li> <li>Item not authorized for discharge at this</li> </ul> </div> </div>						

**Figure 6-155. Override Item Renewal Limit**

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# OPAC Configuration

# 7

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## Introduction

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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

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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.

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## 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.



---

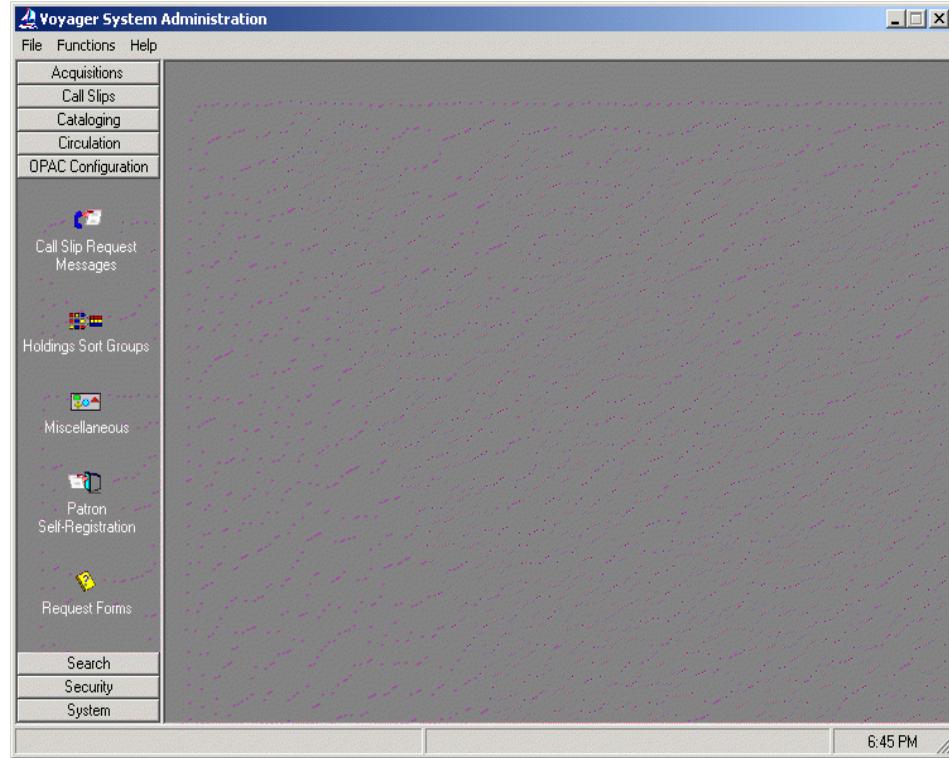
### Procedure 7-1. Creating Call Slip Request Messages

---

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](#).

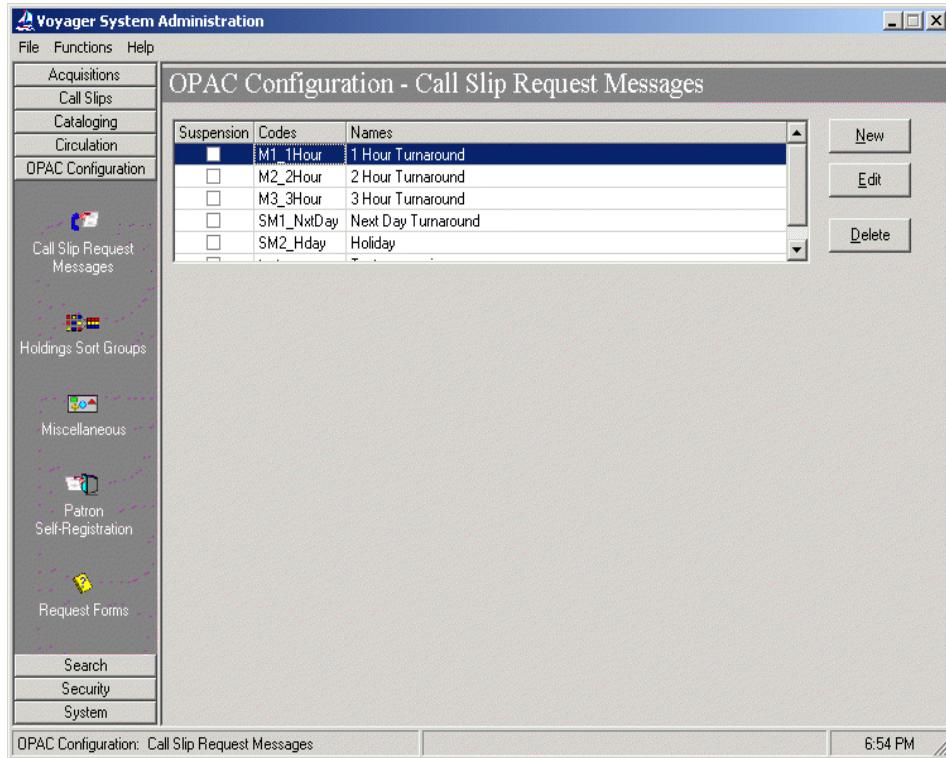


---

**Figure 7-1. OPAC Configuration main window**

2. Click **Call Slip Request Messages**.

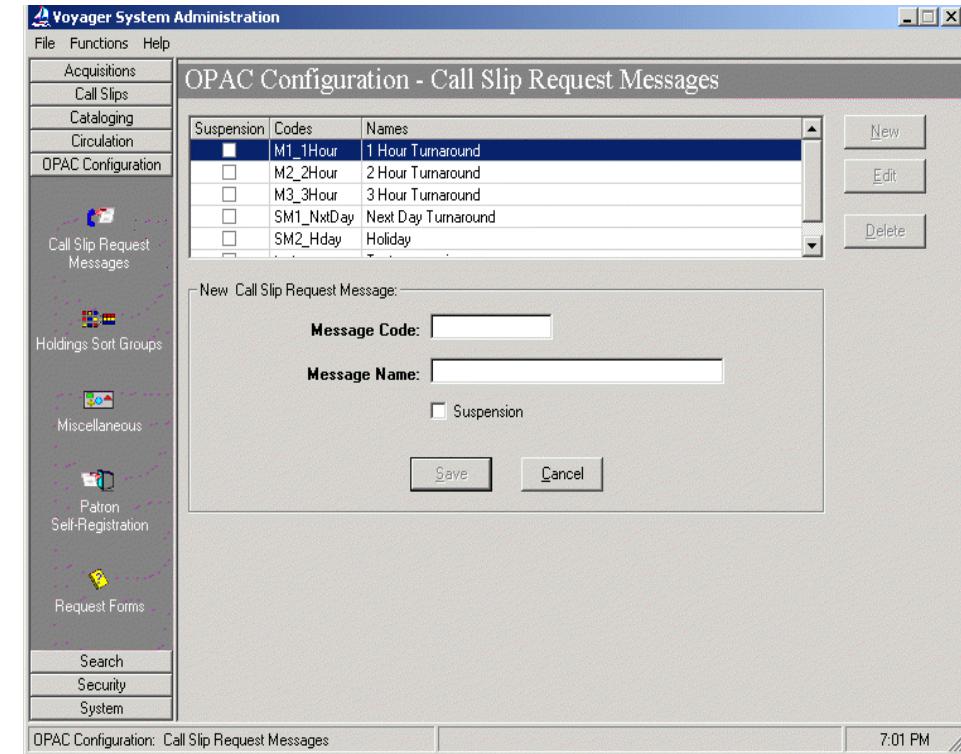
Result: The **Call Slip Request Messages** list displays. See [Figure 7-2](#).



**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. New 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 WebVoyáge 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 WebVoyáge.

---

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.*

---

### Callslipmsg\_CODE.htm

---

The content of each call slip request message is contained in a file called `callslipmsg_CODE.htm` ([Figure 7-4](#)) you create where `CODE` is the **Message Code** entered on the **Call Slip Request Messages** dialog box.

---

```
callslipmsg_M1_1Hour.htm  
callslipmsg_M2_2Hour.htm  
callslipmsg_M3_3Hour.htm  
callslipmsg_SM1_NxtDay.htm  
callslipmsg_SM2_Hday.htm
```

---

**Figure 7-4. Call slip request message content filename examples**

You need to create one message file for each code created through the **Call Slip Request Messages** function.

The message files are stored on the WebVoyage server in the following directory path `.../etc/webvoyage/local/`.

See the *Voyager Circulation User's Guide* about how to select a specific message to display to patrons. Also, see the *Voyager WebVoyage User's Guide* for more information about the `callslipmsg_CODE.htm` files.



### 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: This 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.

## **Holdings Sort Groups**

---

The OPAC Holdings Sort Group Definitions allow you to sort search results 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 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 7-4. 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 7-5](#)).



**Figure 7-5.** 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 7-6](#)).

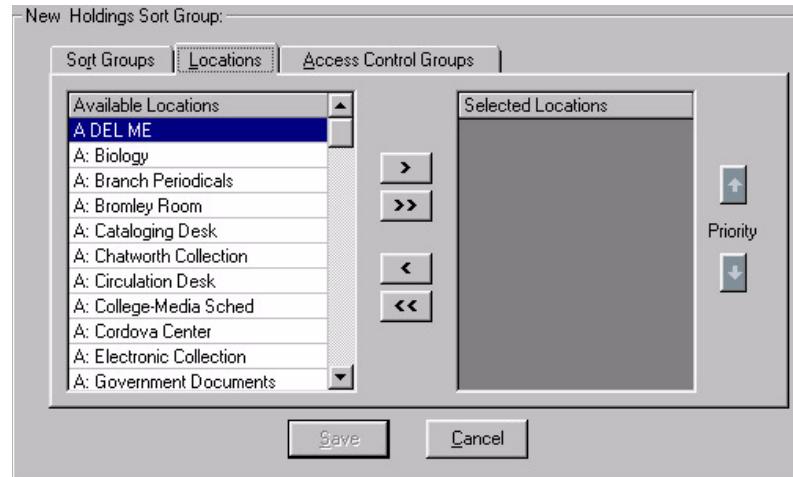


Figure 7-6. Locations tab

On the **Locations** tab:

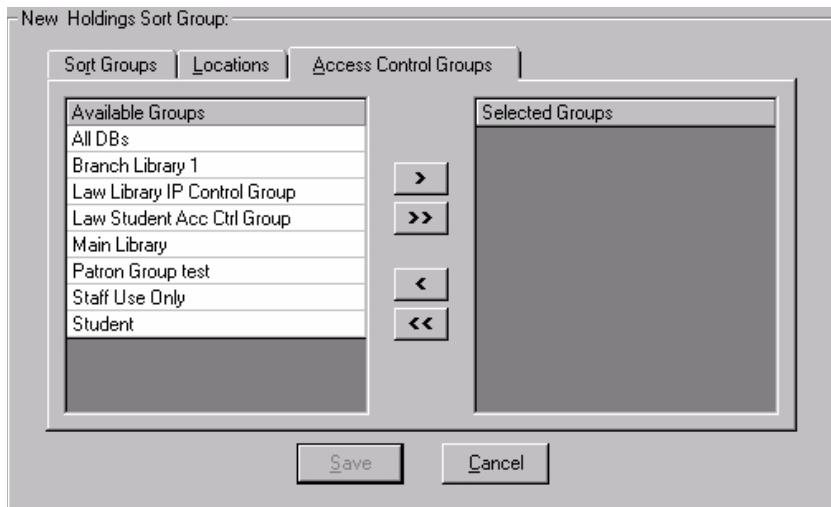
8. Move the desired locations from the **Available Locations** list to the **Selected Locations** list using the **>** button.

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 7-7](#)).



**Figure 7-7. 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 7-8](#) and [Figure 7-9](#)).

System - Access Control 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

New    Edit    Delete

Edit Access Control Group:  
 Group     Patron Group

Group Code:

Group Name:

Group Type:

Save    Cancel

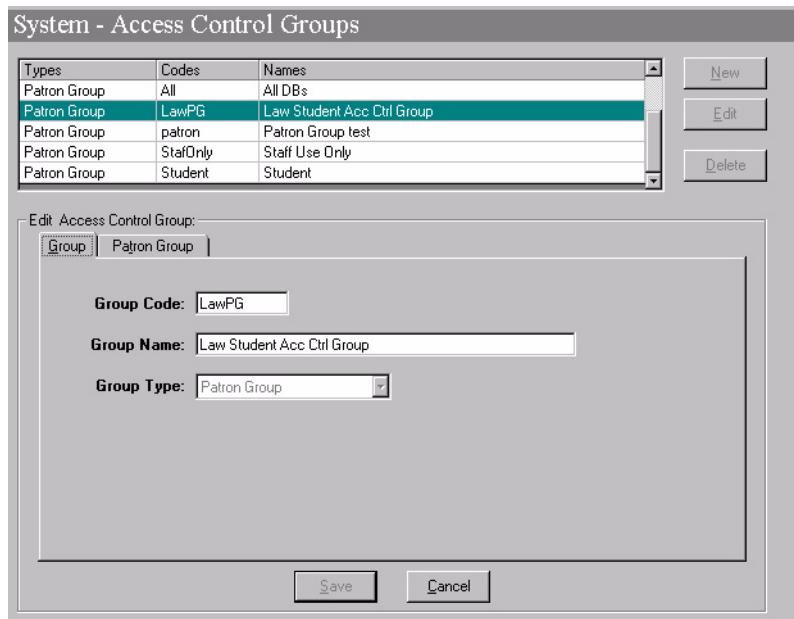
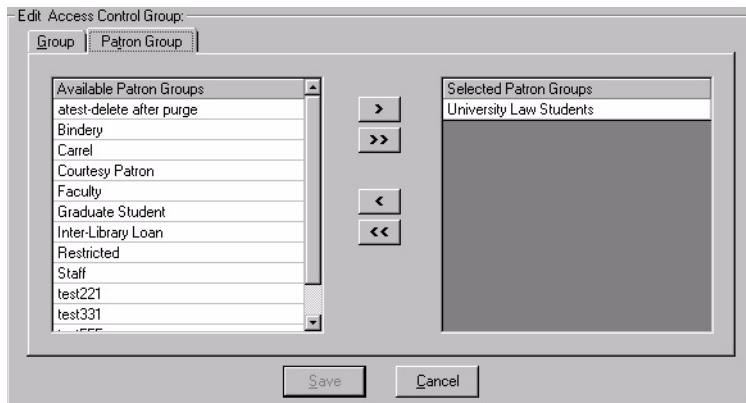


Figure 7-8. Access Control Group used in Example

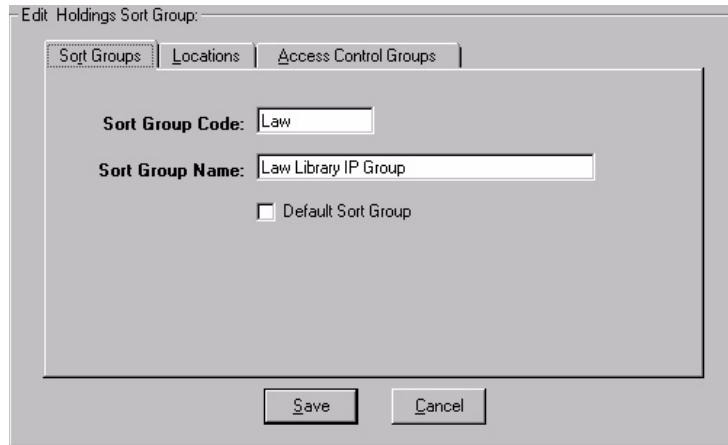


**Figure 7-9. Patron Group selected in Access Control Group**



#### **Procedure 7-5. 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 7-5](#)).



---

**Figure 7-10.** 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**.

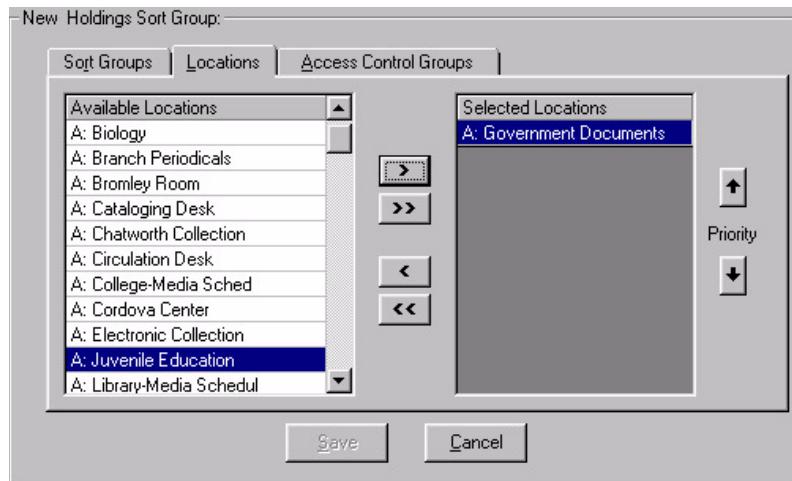
Result: This sets the Sort Group Code to Law.

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 7-6](#)).



**Figure 7-11. 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 7-7](#)).

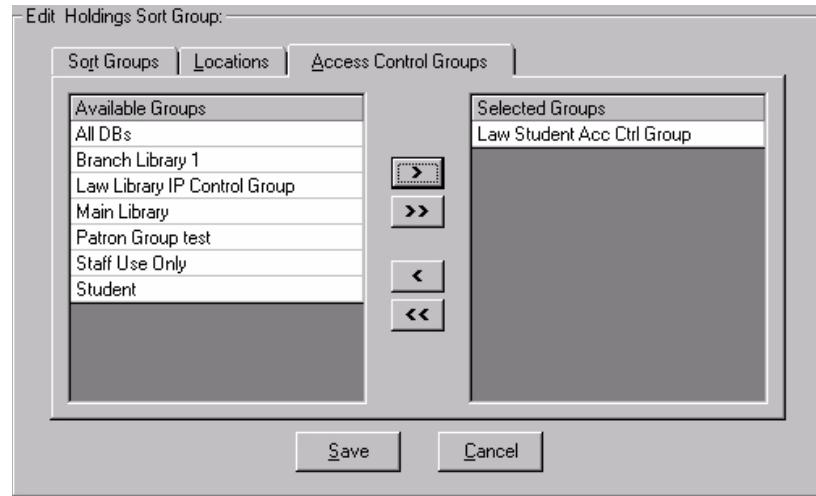


Figure 7-12. Access Control Groups tab

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.

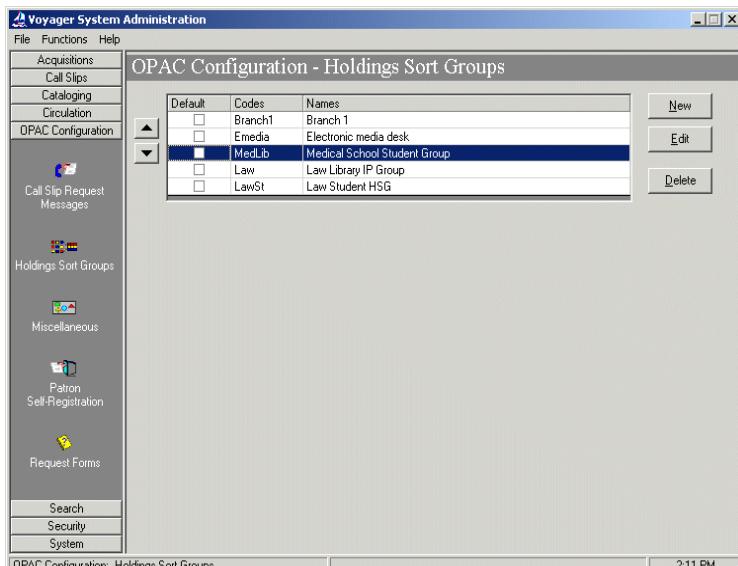
Result: When a patron classified under one of the Access Control Groups runs a search, WebVoyage sorts the Holdings information based on the Locations tab settings of the first Holdings Sort Group in the Holdings Sort Group list that the patron falls under.



## Procedure 7-6. 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.

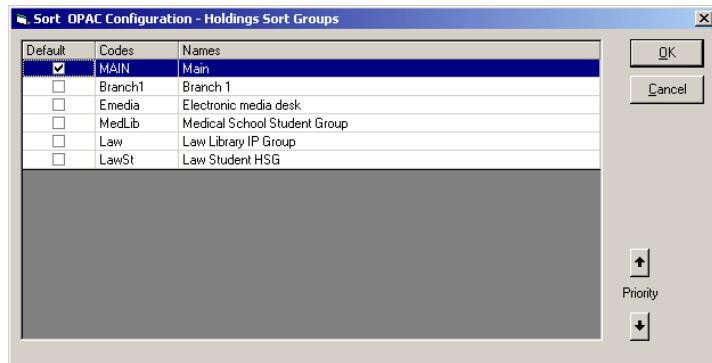
Use the following to move a Sort Group higher or lower in the list.



**Figure 7-13. Holdings Sort Group main dialog box**

Click the Set Rules button on the Holdings Sort Groups main dialog box (see [Figure 7-13](#)).

Result: The Holdings Sort Groups rules dialog box opens (see [Figure 7-14](#)).



**Figure 7-14. 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.

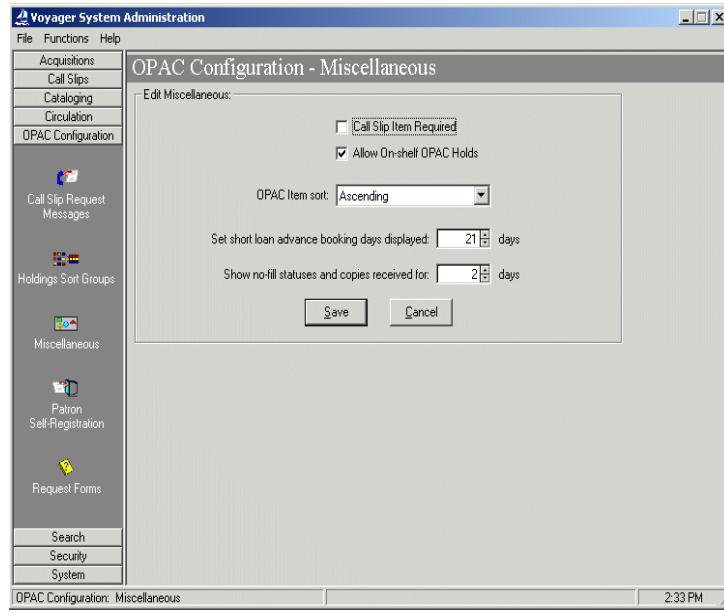
Result: The Sort Group is placed in the proper priority order within the sort group list.

## 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 7-15](#).



**Figure 7-15. 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	<p>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.</p> <p>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.</p> <p>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 <b>Specify an issue not found in the list</b> 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.</p> <p>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 holding records is defined in Call Slip Rules in the System Administration module.</p>
Allow On-shelf OPAC Holds	<p>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.</p> <p>If this check box is not selected, patrons in WebVoyage are not allowed to place holds on such items.</p>
OPAC Item sort	<p>Select from the OPAC Item sort drop-down list whether item sequences should display in ascending or descending order in the <b>Available Items</b> dialog box when a patron makes a request. Items are sequenced through the item sequencing activities performed in the Circulation and Cataloging modules.</p>

---

**Table 7-1. OPAC Configuration - Miscellaneous options**

Option	Description
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 the number of days identifying the length of time that reasons display for not filling call slip requests.

## **Patron Self-Registration**

---

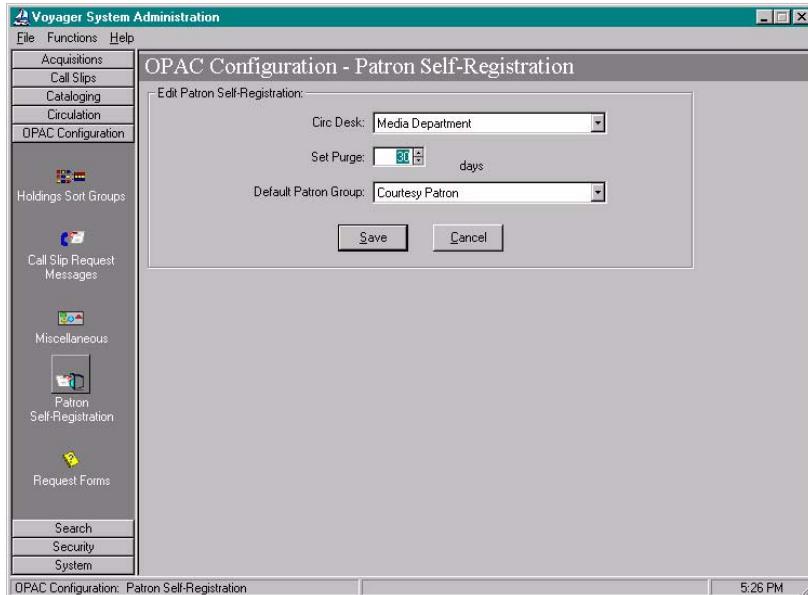
The Patron Self-Registration feature allows patrons to enter the information required to create a patron record themselves. Patrons can then go to the Circulation Desk to have a barcode added and the expiration date changed. This allows your library to reduce staff time creating patron records, while 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 7-16](#) details the Patron Self-Registration components of The Voyager System Administration Module.



**Figure 7-16. 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.

For more information about Patron Self-Registration, see the *Voyager WebVoyage User's Guide*.

## 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:

**Endeavor Information Systems, Inc.**  
See notice on first page

- 
- 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:

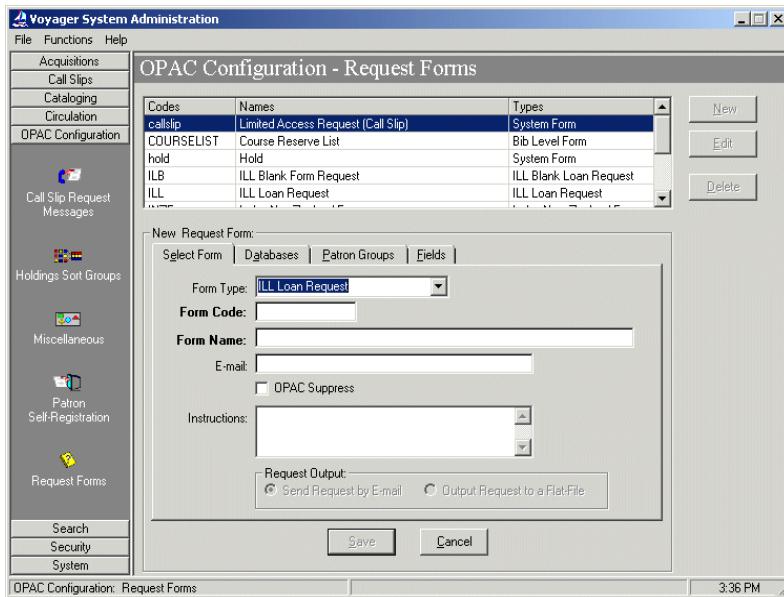
- ARTEmail Loan Form
- ARTEmail Photocopy Form
- Bib Level Form
- Blank Form
- ILL Blank Loan Request
- ILL Blank Photo Request
- ILL Loan Request
- ILL Photocopy Request
- Item Level Form
- System Form
- VDX ILL Form

## **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 7-17](#) for an example of the tab options available with the ILL Loan Request Form Type.



**Figure 7-17. 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 7-7. 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 7-17](#)).

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 7-18](#) shows the Select Form tab.

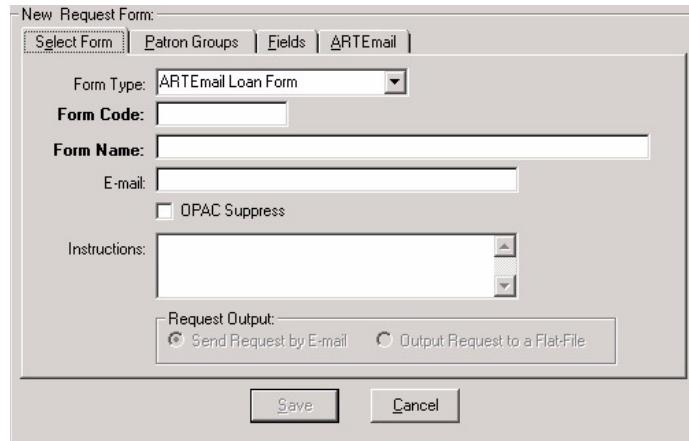


Figure 7-18. Select Form Tab and Dialog Box

### Databases tab

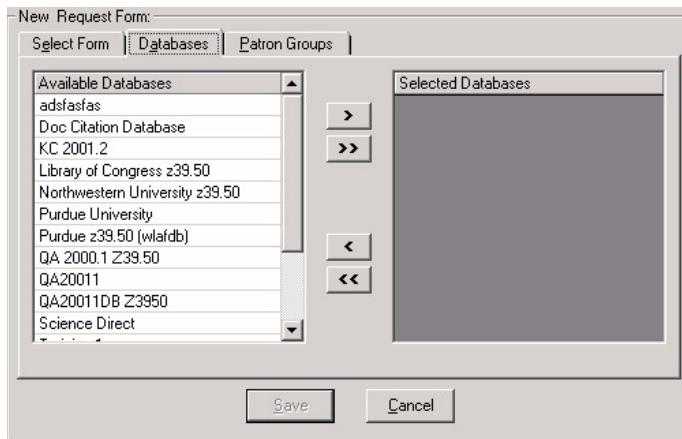
The Databases tab contains the databases (by database name as entered into Database Definitions) available for selection. Only when connected to the databases selected on this tab is the form available.



#### 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 7-19](#) shows the Databases tab.



**Figure 7-19. Databases Tab and List Boxes**



#### **Procedure 7-8. 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.

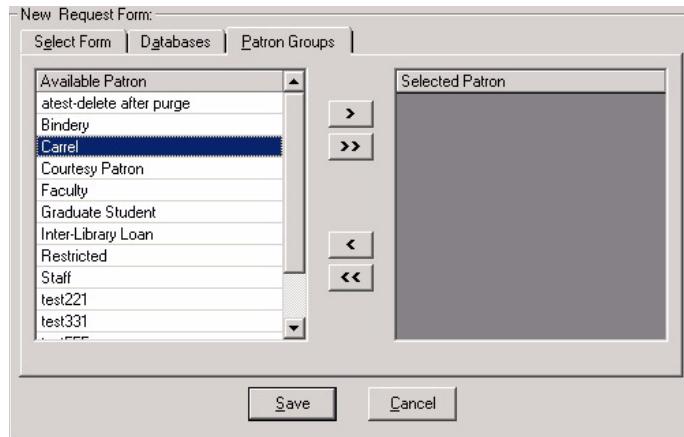


#### IMPORTANT:

*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 7-20](#) shows the Patron Groups tab.

---



---

Figure 7-20. Patron Groups Tab and List Boxes



### Procedure 7-9. 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**

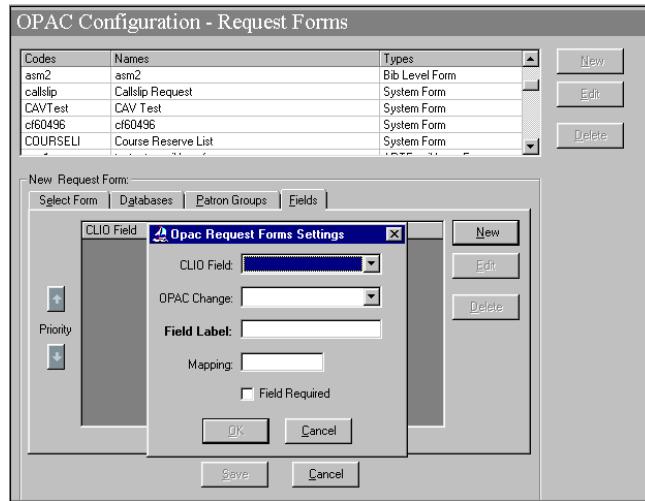
Component	Description
Clio Field	For ILL requests, specifies the Voyager ILL field to which the field corresponds. For more information about the Clio Fields, see the Voyager ILL User's Guide
OPAC Change	Determine the display and edit availability options for a field. <ul style="list-style-type: none"> <li>• 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).</li> <li>• No Entry/Display: the field is not editable but the information does display on the request form</li> <li>• Editable: the field displays on the form and is editable.</li> </ul> <b>NOTE:</b> 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 7-21](#) shows the Fields tab.



**Figure 7-21. 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**

<b>Form</b>	<b>Description</b>
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 <b>Instructions</b> field on the <b>Select Form</b> tab). See the <b>Fields</b> 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 Daemon.  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.
ILL Photocopy Request	Inter-Library Photocopy request	For more information see the Voyager ILL User's Guide.
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 WebVoyáge 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 WebVoyáge 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 7-22](#)) 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 Daemon 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.



**Figure 7-22. 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 7-23.** Sample template

would be output as the following:

---

Patron: Susan B. Anthony  
Barcode: 789107594

Title: Dollars, Quarters and You  
Call No: QC9387.M55

---

**Figure 7-24.** 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 **WebVoyáge 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)**

<b>Field Name</b>	<b>Field Code</b>	<b>Item-Level Request</b>	<b>ARTE-mail Requests</b>
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 opacrequests.[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.

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## Search Configuration

# 8

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### The Search Menu

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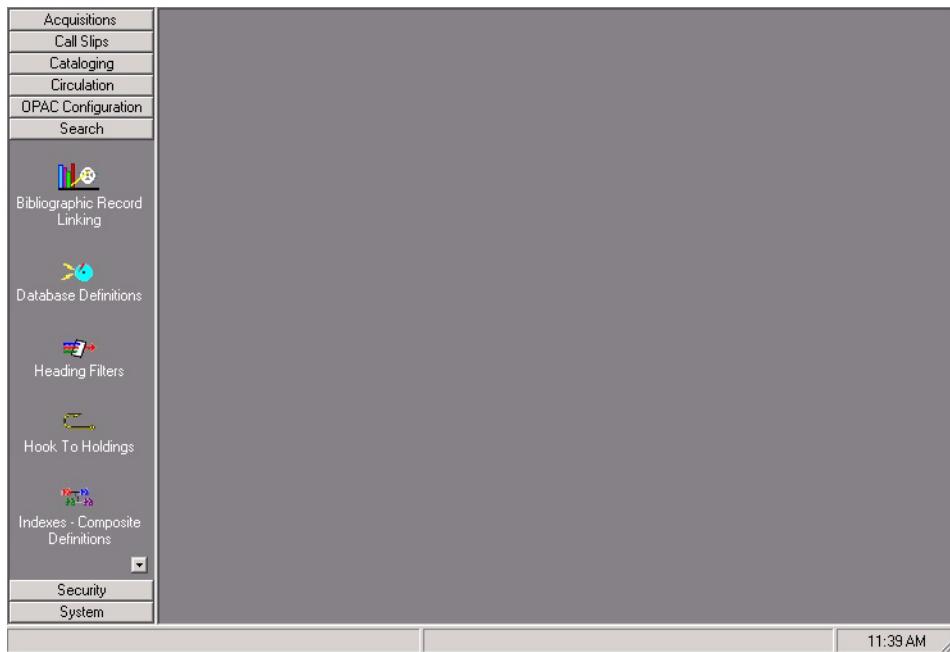
Search Configuration includes some of the most powerful functions of the Voyager system, offering many options for searching your site's bibliographic data. Here is where you decide how to name all of the available search types; what sort options apply to the results set of a particular search type; 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 8-57 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:

- WebVoyage Name Headings Search
- Staff Name Headings Search
- WebVoyage Title Headings Search
- Staff Title Headings Search
- WebVoyage 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 WebVoyage Headings Search types are selected on the WebVoyage module's search tab "Headings" (the search tab label may be changed at your site).

The WebVoyage Subject and WebVoyage Name Headings Search types are automatically fixed in the WebVoyage module. You may make the WebVoyage Title Headings Search type available or not in the WebVoyage 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. See the *Voyager WebVoyage User's Guide* for more information on specifying options in WebVoyage.

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 WebVoyage module or both. In the WebVoyage 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 WebVoyage 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 Endeavor Information Systems, Inc. (EISI) and the keyword index for the holdings records has to be built before you can perform Holdings Keyword searches. Please contact EISI 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.

**NOTE:**

Holdings Keyword Searches is not available through WebVoyage.

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 dialog boxes:

- 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.

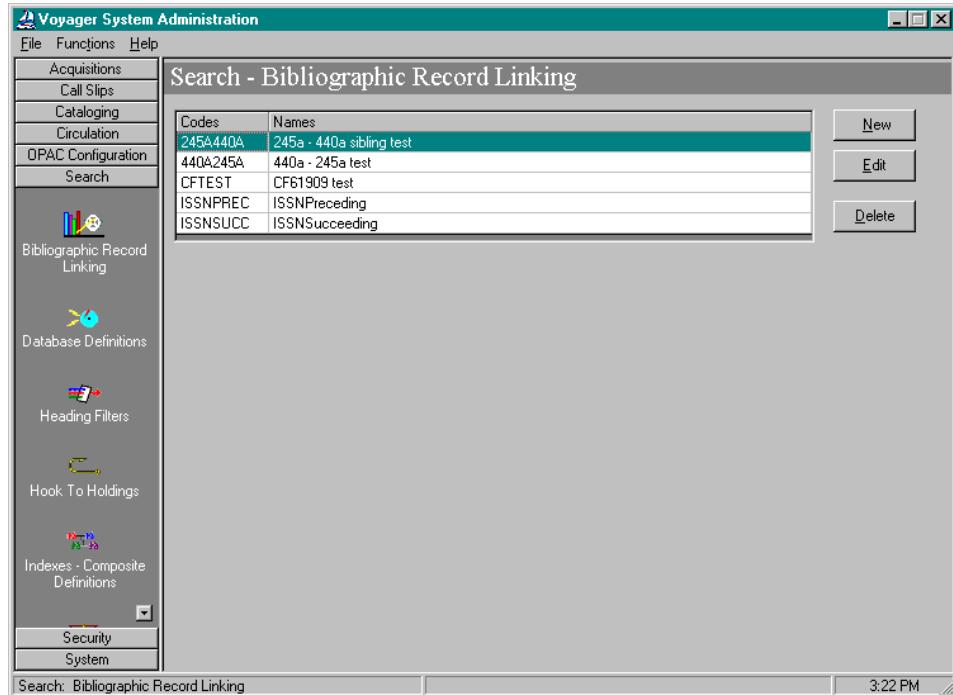
Since these indexes are left-anchored, the rules for searching are the same as for searching the other left-anchored indexes:

- 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 WebVoyáge 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 WebVoyáge.

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 8-8](#).



## Procedure 8-1. Creating Bibliographic Record Linking Profiles

---

1. Open the Voyager System Administration module.
2. Click the **Search** menu bar.
3. 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 Bibliographic Record Linking window opens (see [Figure 8-2](#)).

4. Open the New Bib Linking or Edit Bib Linking dialog box:

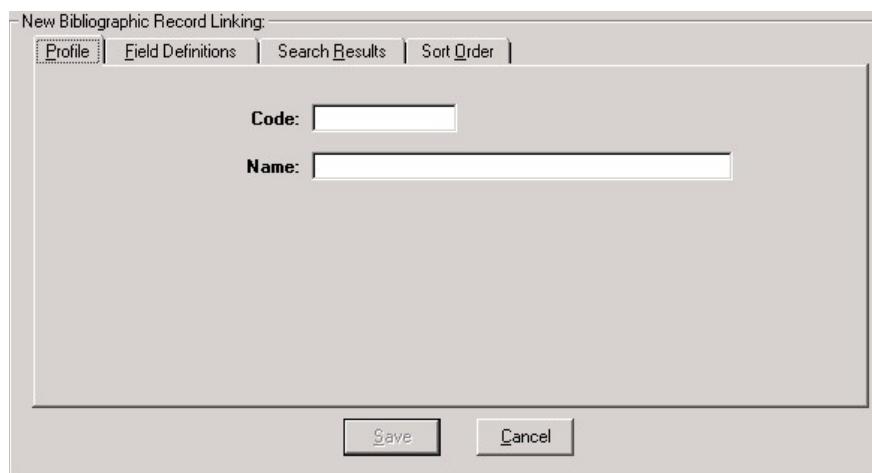
- If creating a new profile, click the **New** button.

**Result:** Invokes the New Bib Linking dialog box (see [Figure 8-3](#)).

- If editing an existing profile, click the **Edit** button.

**Result:** Invokes the Edit Bib Linking dialog box.

---



---

**Figure 8-3. New Bib Linking Dialog Box**

5. Select the **Profile** tab

On the Profile tab:

6. 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.

7. 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.

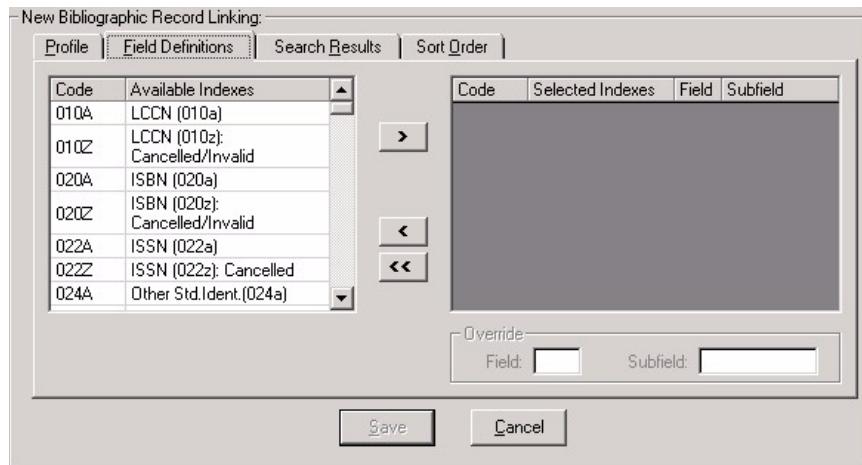
**NOTE:**

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.

8. Click the **Field Definitions** tab.

On 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**

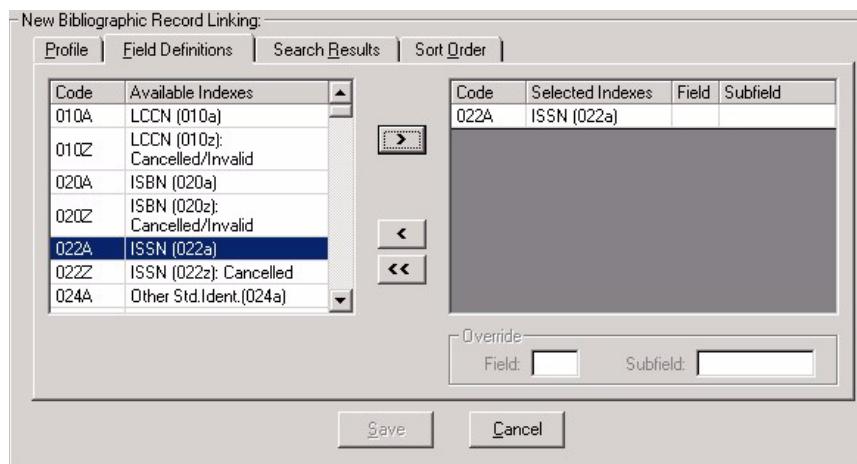
The **Field Definitions** tab contains a list of available indexes in the left window of the dialog box and a list of selected indexes in the right window. When an index in the lower window is highlighted, the tab refreshes to include single field and subfield override boxes.

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 8-62).

9. To add an index, highlight the index in the **Available Index** list and click the **>** button to add it to the **Selected Indexes** list.

You can add all of the available indexes to the **Selected indexes** list by clicking the **>>** button.

**Result:** The selected index displays in the Selected Indexes window and the Field Override and Subfield Override fields display, [Figure 8-5](#).



**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*

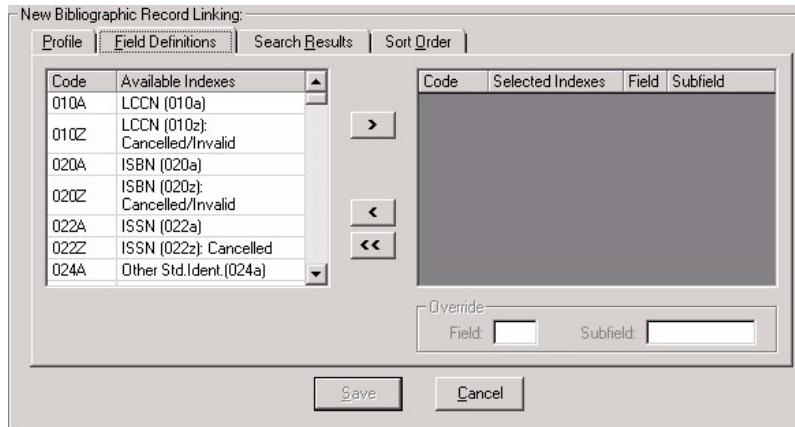
*processing ability of the system. WebVoyáge display of related records slows down considerably.*

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.

**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**

10. 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.*

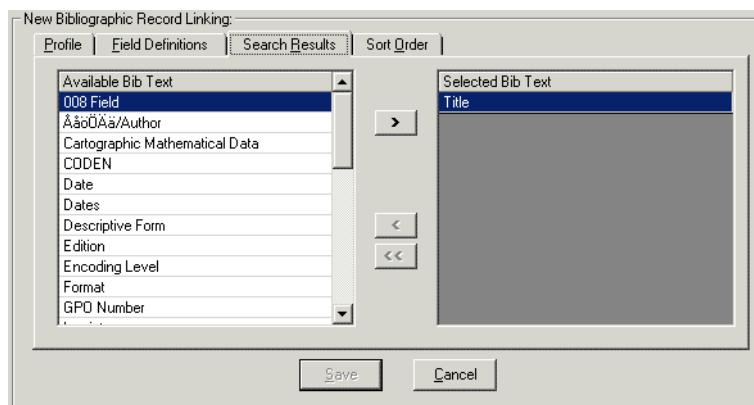
---

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.

11. 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.

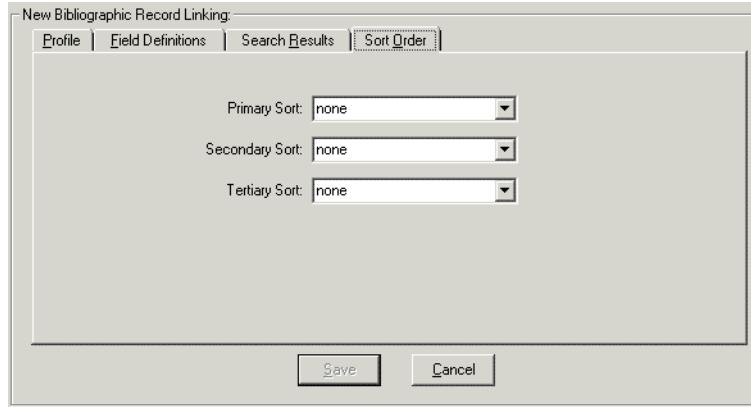
  12. Click the **Search Results** tab.
  13. Highlight the desired element in the **Available Bib Text** column (see [Figure 8-7](#)) and click the **>** button to add it to the **Selected Bib Text** column. You can select up to 3 elements for each profile.
- 



---

**Figure 8-7. Search Results Tab with Bib Text Selected**

14. To remove an element from the **Selected Bib Text** column, highlight the element and click the **<** button.
15. Click the **Sort Order** tab.



---

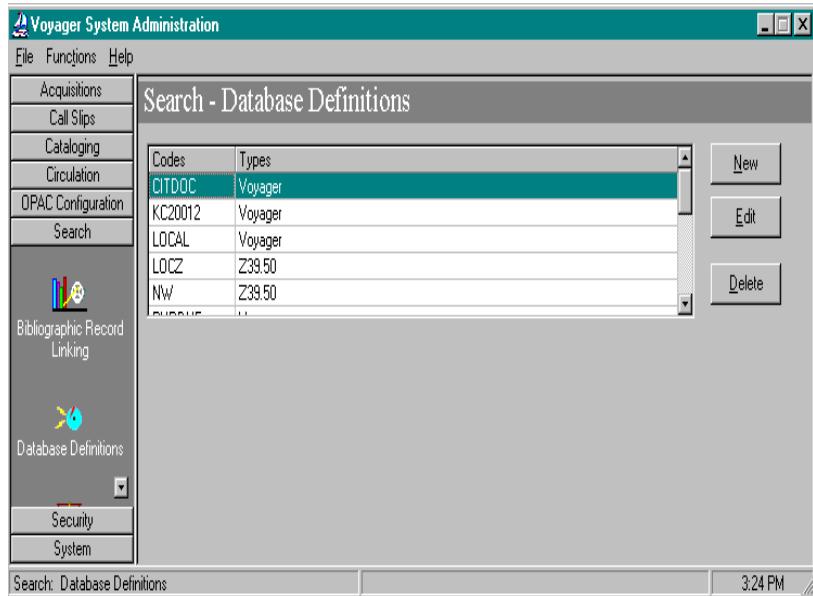
**Figure 8-8. Sort Order Tab with Primary Sort Defined**

1. Click the **down** arrow in the **Primary Sort** field and select from the list.
  2. Click the **down** arrow in the **Secondary Sort** field and select from the list.
  3. Click the **down** arrow in the **Tertiary Sort** field and select from the list.
  4. 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.



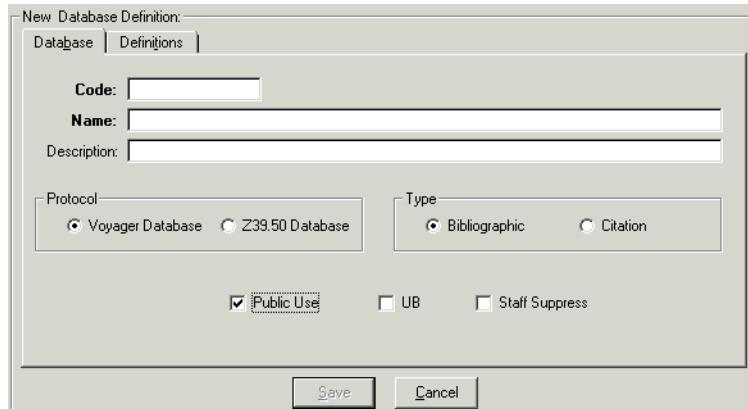
**Figure 8-9. Database Definitions Main**

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.

The Database Definition allows you to maintain the searching databases you access using the Voyager modules.

The **Database Definitions** dialog box (see [Figure 8-10](#)) can contain the following sections (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 8-10. 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 8-10](#)).

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)

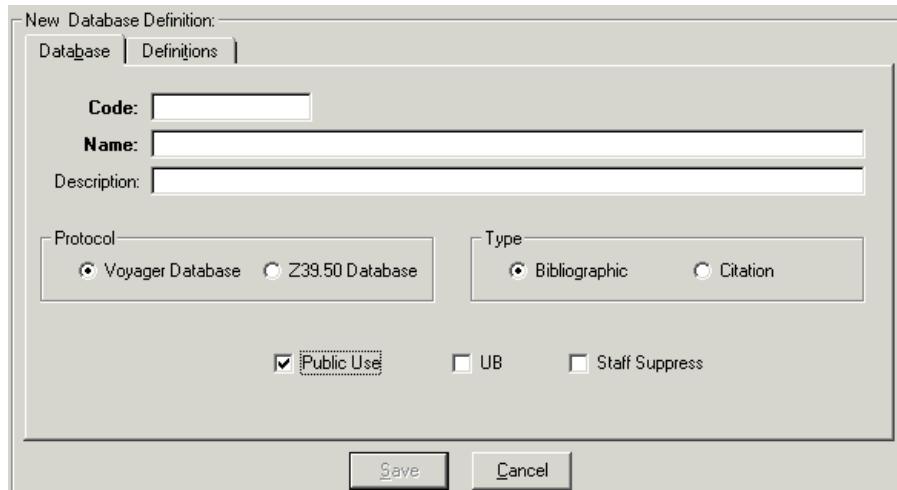
- Type (standard bibliographic or citation)
- Staff, UB, and Public Access options



### Procedure 8-2. Configuring the Database Tab

1. Select the **Database** tab.

**Result:** Invokes the Database tab dialog box (see [Figure 8-11](#))



**Figure 8-11. 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 WebVoyage.*

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 8-12](#), [Figure 8-13](#) and [Figure 8-14](#)). For a summary of the fields on the Definitions tab, see [Table 8-2](#).

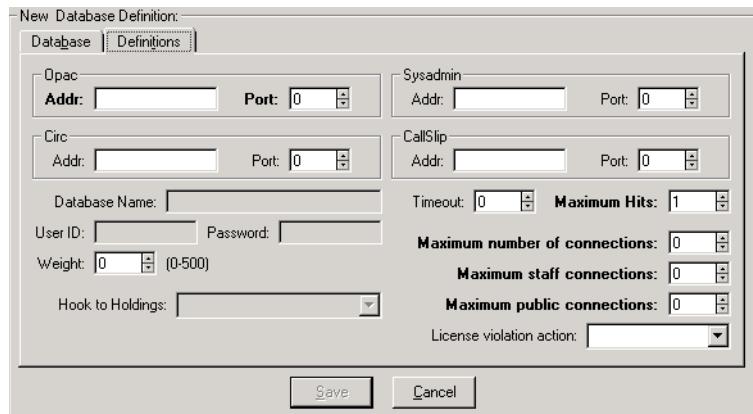


Figure 8-12. Definitions Tab (Voyager Bibliographic)

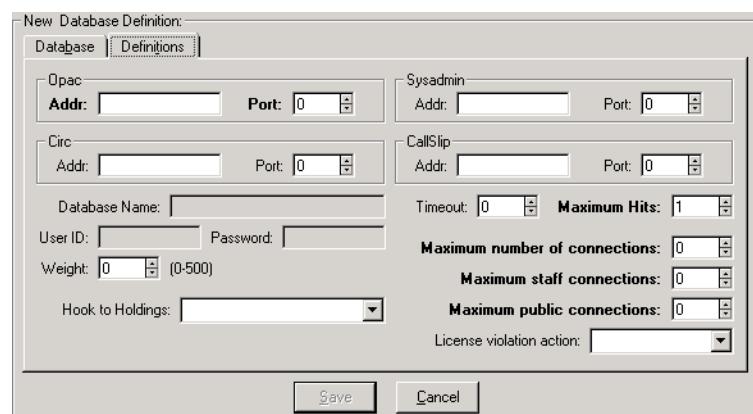
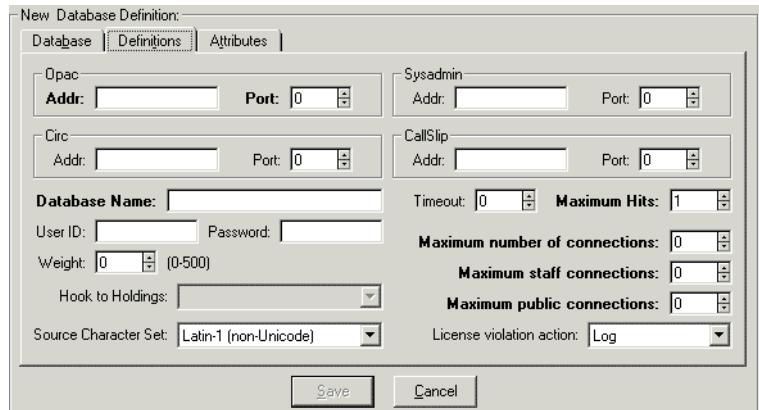


Figure 8-13. Definitions Tab (Voyager Citation)

**Figure 8-14. Definitions Tab (Z39.50 Bibliographic)**

[Table 8-2](#) details the Definitions tab fields.

**Table 8-2. Definitions Tab Fields (Page 1 of 3)**

Field	Description	Possible Values	Notes
Name	Database name as displayed in the WebVoyage window	Alphanumeric up to 100 characters.	
Description	Description of the database	Alphanumeric up to 200 characters.	
OPAC			
Addr:	IP Address of the target server's database	Valid IP address.	
Port:	Port of the target server's database	Valid port number.	
Sysadmin <sup>1</sup>			
Addr:	IP Address of the target server's database	Valid IP address.	
Port:	Port of the target server's database	Valid port number.	
Circ <sup>1</sup>			
Addr:	IP Address of the target server's database	Valid IP address.	

**Table 8-2. Definitions Tab Fields (Page 2 of 3)**

Field	Description	Possible Values	Notes
Port:	Port of the target server's database	Valid port number.	
CallSlip <sup>1</sup>			
Addr:	IP Address of the target server's database	Valid IP address.	
Port:	Port of the target server's database	Valid port number.	
Database Name <sup>2</sup>	Name of the target database, as required by the vendor.		Obtain this information from the database vendor.
User ID <sup>2</sup>	User ID for the target database, as required by the vendor.		Obtain this information from the database vendor.
Password <sup>2</sup>	Password for the ID for the target database, as required by the vendor.		Obtain this information from the database vendor.
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	Access to the lower priority record's holdings is still made available.
Hook to Holdings <sup>3</sup>	Indicate which Hook to Holdings profile to use with this database.	Profiles created in Search> Hook to Holdings.	See <a href="#">Hook To Holdings</a> on page 8-39.
Source Character Set <sup>2</sup>	If any bibliographic z39.50 database connections have been configured, select the expected character set of the incoming records.	Select from drop-down menu.	

**Table 8-2. Definitions Tab Fields (Page 3 of 3)**

<b>Field</b>	<b>Description</b>	<b>Possible Values</b>	<b>Notes</b>
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	
Maximum number of connections	Maximum number of concurrent connections allowed to the database.	0 to 9999 Determine this number based on your license provisions	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	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	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.	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.



### 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 will appear, with the fields displaying according to protocol and type selected on the Database tab.

See:

- Figure 8-12 on page 22 for Voyager Bibliographic
- Figure 8-13 on page 22 for Voyager Citation
- Figure 8-14 on page 23 for Z39.50 Bibliographic
- Z39.50 Citation is the same as Figure 8-14 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.

3. Enter the target library's OPAC server port in the **Port** field of the OPAC section.

**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**, or **Callslip** blocks.

For those customers participating in Universal Borrowing, see the *Voyager Universal Borrowing User's Guide* 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	<ol style="list-style-type: none"><li>1. Enter the maximum number of connections that your institution is licensed to offer in the <b>Maximum number of connections</b> field.</li></ol> <p><b>NOTE:</b></p> <ul style="list-style-type: none"><li>• 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.</li></ul>
prevent or monitor excess connections to the database on a specific staff/public basis	<p><b>NOTE:</b></p> <p>The limit in this field will be ignored if any number higher than zero is entered in the <b>Maximum staff connections</b> or <b>Maximum public connections</b> fields.</p> <p><b>NOTE:</b></p> <ol style="list-style-type: none"><li>1. Enter the maximum number of staff connections in the <b>Maximum staff connections</b> field</li><li>2. Enter the maximum number of public connections in the <b>Maximum public connections</b> field</li></ol> <p><b>NOTE:</b></p> <ul style="list-style-type: none"><li>• These two numbers should add up to the total number of concurrent connections your institution is licensed to offer.</li><li>• 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.</li></ul>

---

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. Use Attribute 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 of this user's guide 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.



**TIP:**

*A list of attributes for many Voyager supported Z39.50 databases can also be found on the Endeavor eZConnect Product page on SupportWeb.*



#### Procedure 8-4. Adding an Attribute

---

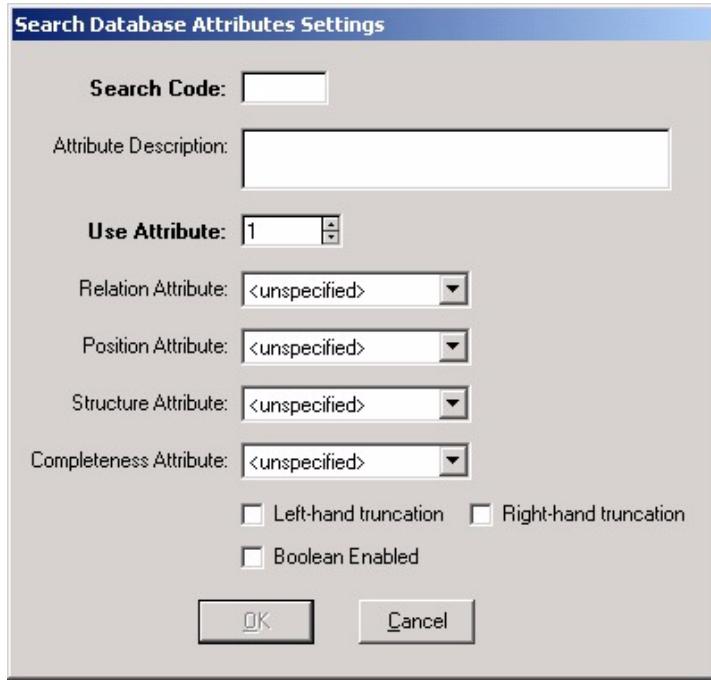
Use the following to add or edit a database.

From the **Database Definitions** main dialog box:

If you are...	Then...
Adding a new database	click the <b>New</b> button
Editing an existing profile	click the <b>Modify</b> button

**Result:** The Search Database Attributes Settings dialog box displays (see [Figure 8-15](#)).

**Result:** The Search Database Attributes Settings dialog box displays (see [Figure 8-15](#)).



**Figure 8-15. 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.

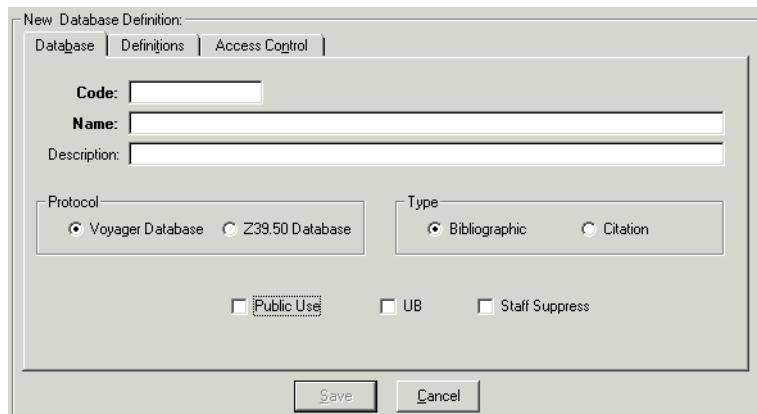
How a particular access group controls access to a non-public database depends upon the type of the access group. Because only the names of the available access groups display on the **Access Control** tab of the **Database Definitions** dialog box and not the particular types of the access groups, you 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 8-16. 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 8-16. 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.

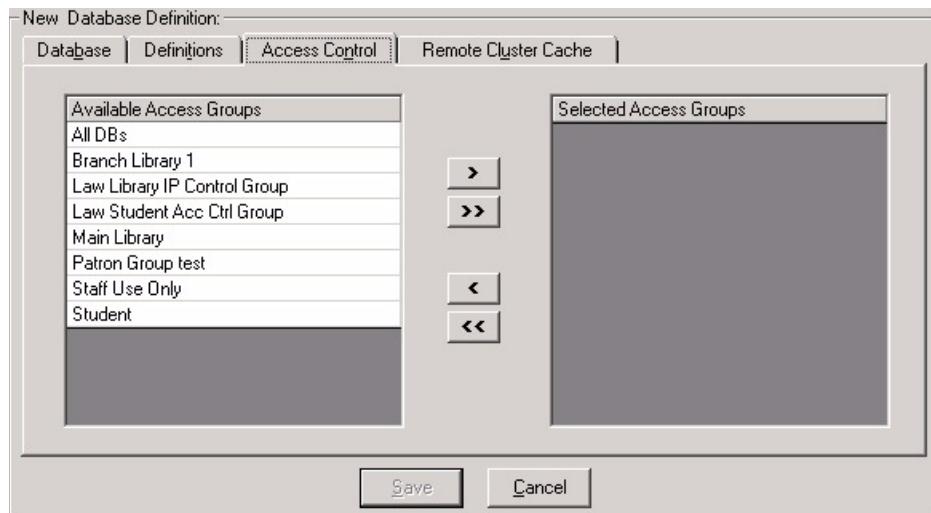


### Procedure 8-5. Assigning Access Control Groups

Use the following to assign or reassign Access Control Groups.

- From the Search - Database Definitions screen, Select the **Access Control** tab.

**Result:** Invokes the Access Control Groups dialog box (see [Figure 8-17](#)). The Available Access Groups and the Selected Access Groups display.



**Figure 8-17. Access Control Groups Tab**

- 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 WebVoyáge.*

---

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.



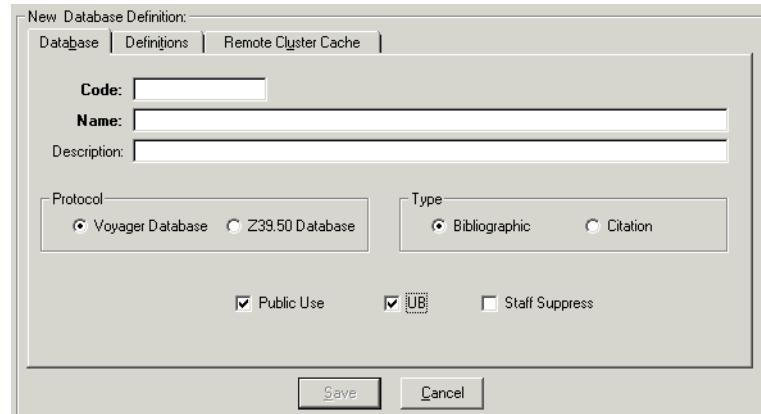
### Procedure 8-6. Updating the Remote Cluster Cache

---

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 8-18](#)).



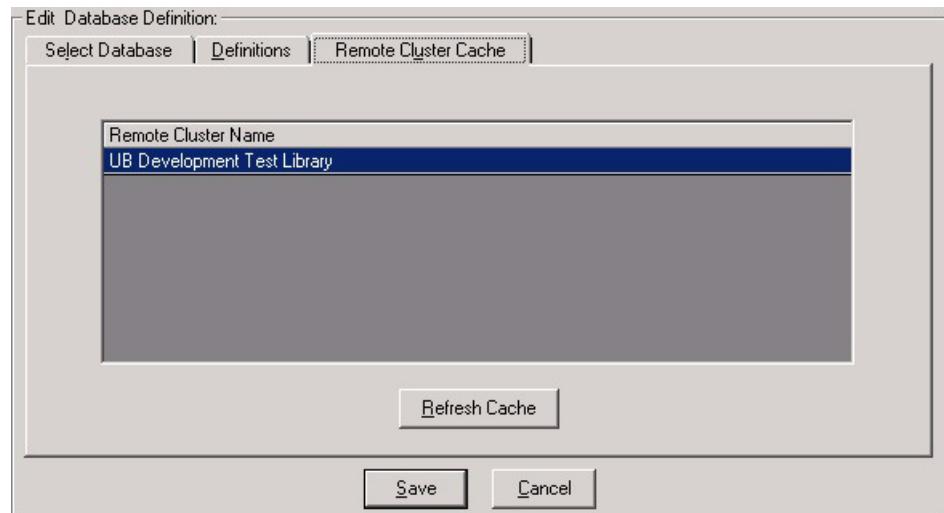
---

**Figure 8-18. Remote Cluster Cache Tab**

3. Select the **Remote Cluster Cache** tab.

**Result:** The Remote Cluster Cache dialog box appears (see [Figure 8-19](#)).

---



---

**Figure 8-19. 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

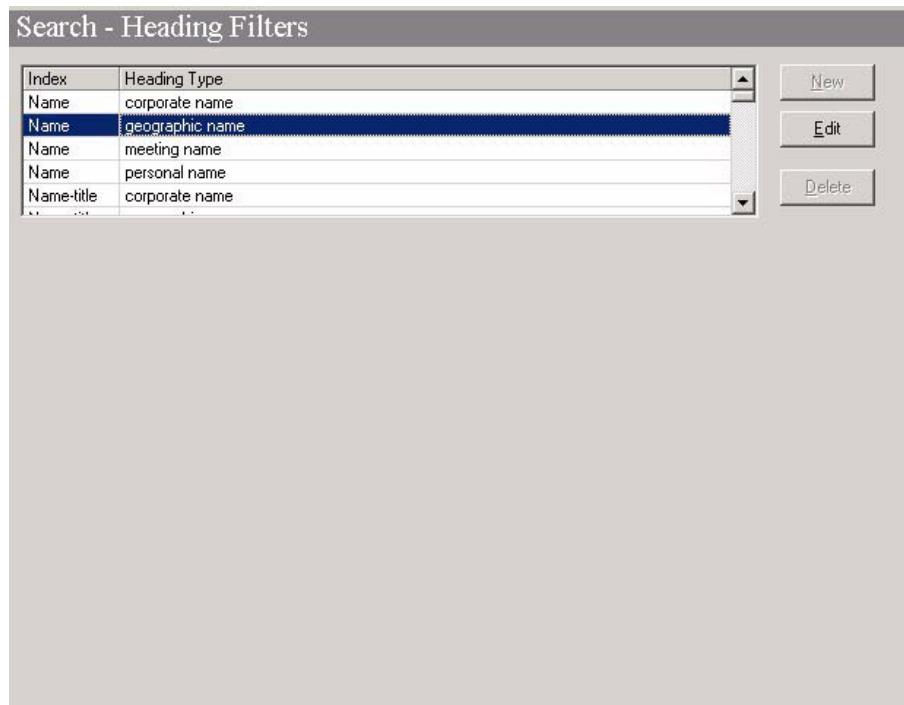
---

The **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.

---



---

**Figure 8-20. Heading Filters**



### Procedure 8-7. Suppressing or Enabling Heading Filters

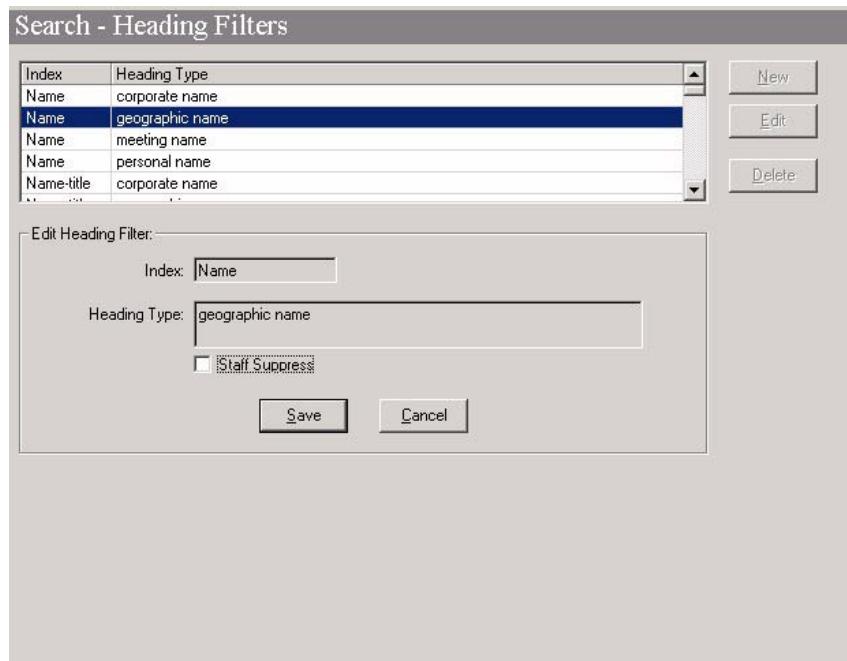
Use the following to suppress or enable Heading Filters.

1. From the Search menu bar, Select the **Heading Filters** button.

**Result:** Invokes the Heading Filters list box (see [Figure 8-20](#)).

2. Select the desired Index and Heading Type combination.
3. Click the **Edit** button

**Result:** The Edit Heading Filter dialog box opens (see [Figure 8-21](#)).



**Figure 8-21. Heading Filters Dialog Box**

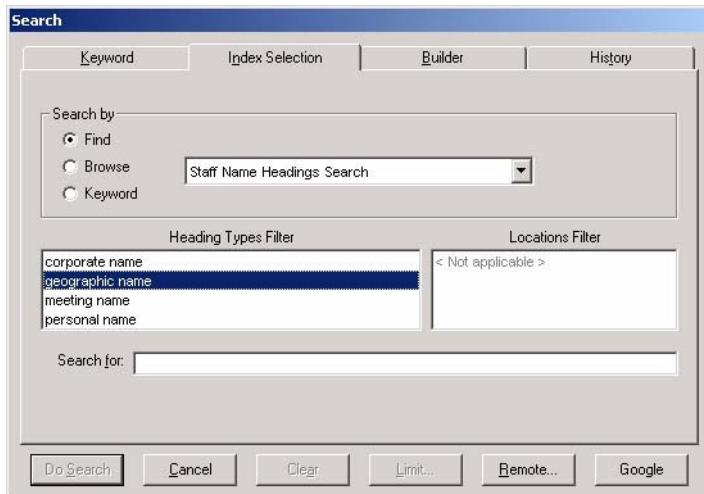
4. Click the **Staff Suppress** check box if you want to suppress the filter from being available when Heading searches are made from the staff modules.

---

[Figure 8-22](#) on [page 8-38](#) shows a filter displayed in the Voyager Cataloging module.

[Figure 8-23](#) on [page 8-38](#) shows the results of the same filter set to Staff suppress.

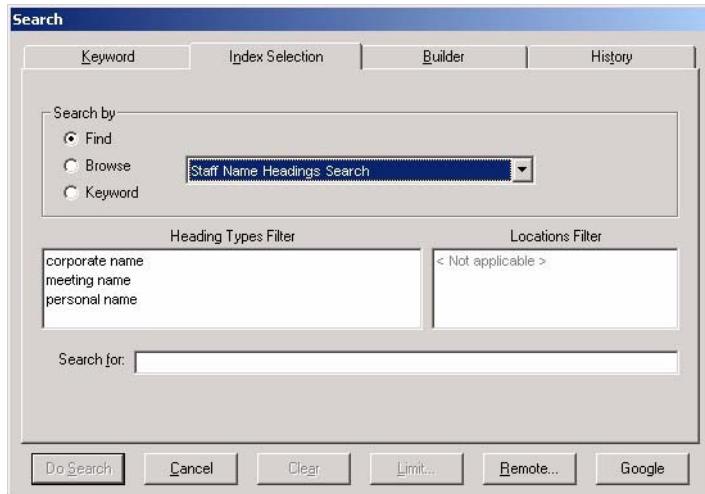
---



---

**Figure 8-22. Heading Filter Displayed**

---



---

**Figure 8-23. 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 8-25 on page 8-41](#)), and define the fields to be searched on the **Field Definitions** tab ([Figure 1 on page 8-43](#)).

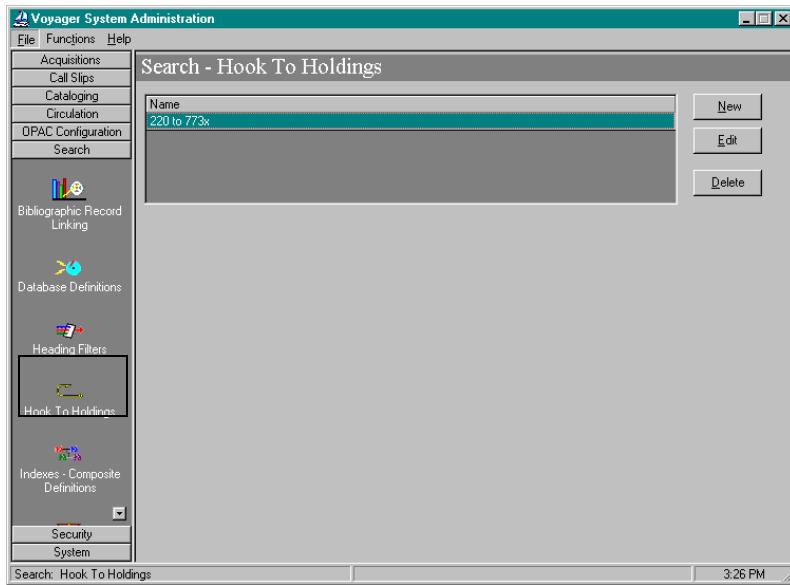
The **Selected Fields** list determines the fields that Voyager will search in trying to match the citation with any database holdings. Voyager will search fields in the order that the fields appear in the list.



### **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 8-24.** System Administration Main Menu

1. Start the **System Administration** module (see [Figure 8-24](#)).
2. Click the **Search** button in the menu sidebar.

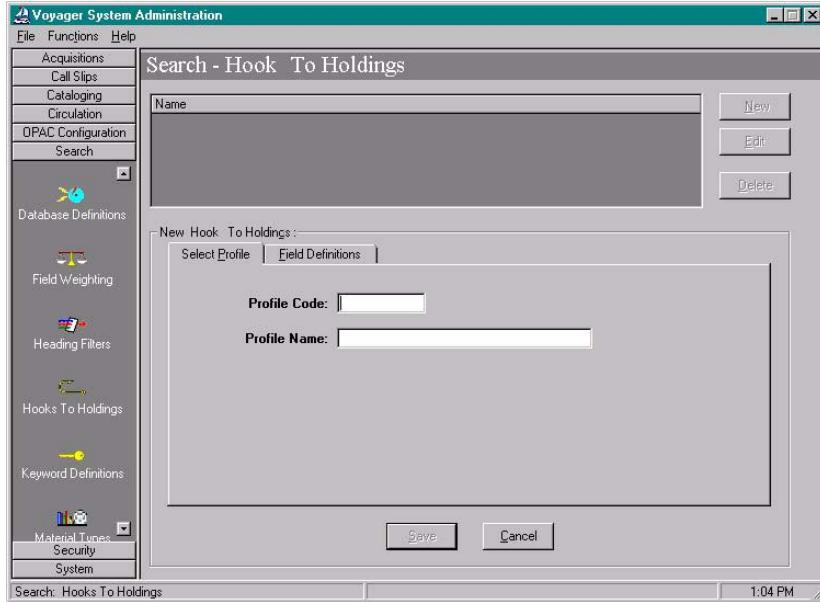
**Result:** The Search menu expands

3. Click the **Hook to Holdings** button (see [Figure 8-24](#)).

**Result:** This opens the Hook to Holdings main menu (see [Figure 8-24](#)).

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 8-25](#)).



**Figure 8-25. Select Profile and Field Definitions Tabs**

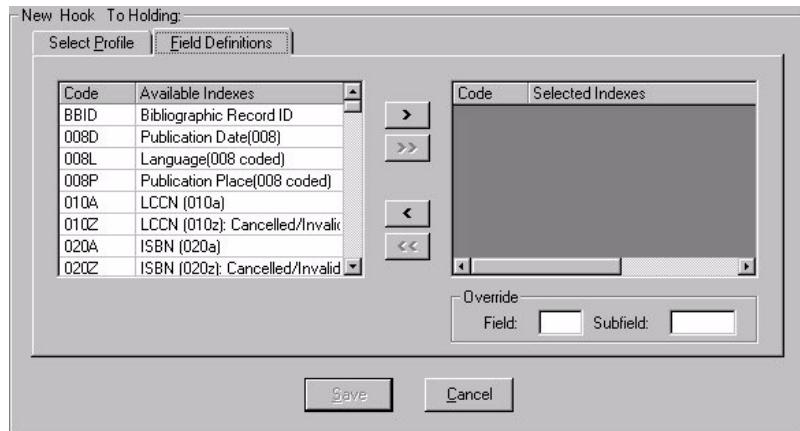
5. **Profile Code** field: Enter an abbreviated name in the **Profile Code** Field (eight characters maximum).
6. **Profile Name** field: Enter a profile name in the **Profile Name** field. Use something short and descriptive of the profile being created (25 characters maximum).

**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 8-25](#)).

**Result:** This invokes the **Field Definitions** dialog box on the **Hook to Holdings** main screen (see [Figure 8-26](#)).



**Figure 8-26. 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	<ol style="list-style-type: none"> <li>a. Highlight the MARC field (and subfield if applicable) of the match point in the <b>Available Indexes</b> list.</li> <li>b. Click the &gt; Button.</li> <li>c. To save changes and return to the Hook to Holdings Main screen, click the <b>Save</b> button.</li> </ol>
The match points (ISSNs) of the local records and the citation records are <i>not</i> the same	<ol style="list-style-type: none"> <li>a. Highlight the MARC field/subfield of the ISSN of the local catalog in the <b>Available Indexes</b> list.</li> <li>b. Click the &gt; button.</li> </ol> <p>When you select the index in the Selected Indexes list box, the Field Override and Subfield Override fields will become active.</p> <ol style="list-style-type: none"> <li>c. To save changes and return to the Hook to Holdings Main screen, click the <b>Save</b> button.</li> </ol>

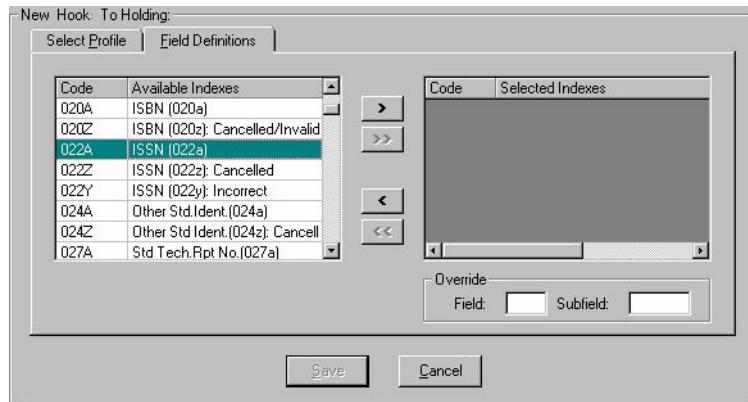
**Result:**

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.

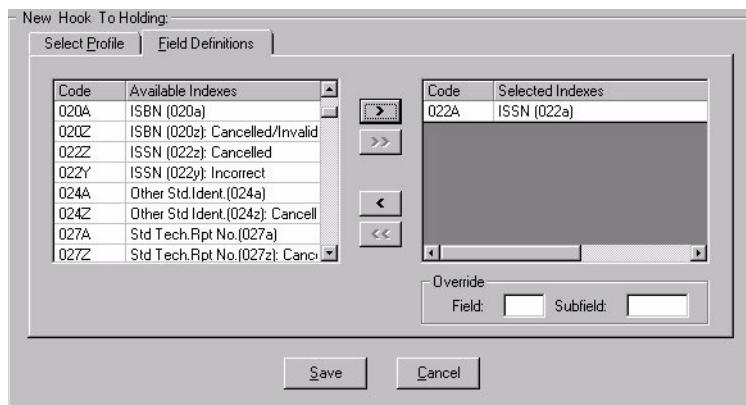
1. From the **Field Definitions** dialog box in the **Hook to Holdings** main screen, highlight the **022A ISSN (022A)** index in the **Available Indexes** list box of the **Field Definitions** tab (see [Figure 8-27](#)).



**Figure 8-27. 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 8-28](#)).



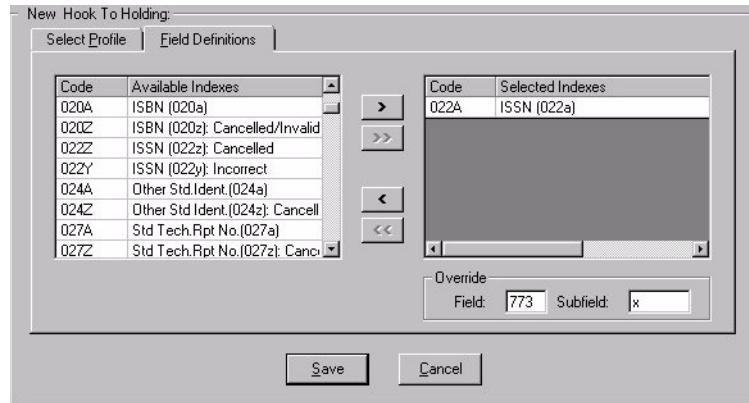
**Figure 8-28. 022A ISSN Index in the Selected Indexes List Box**

**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 8-29](#) on [page 8-45](#).



---

**Figure 8-29. 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**

---

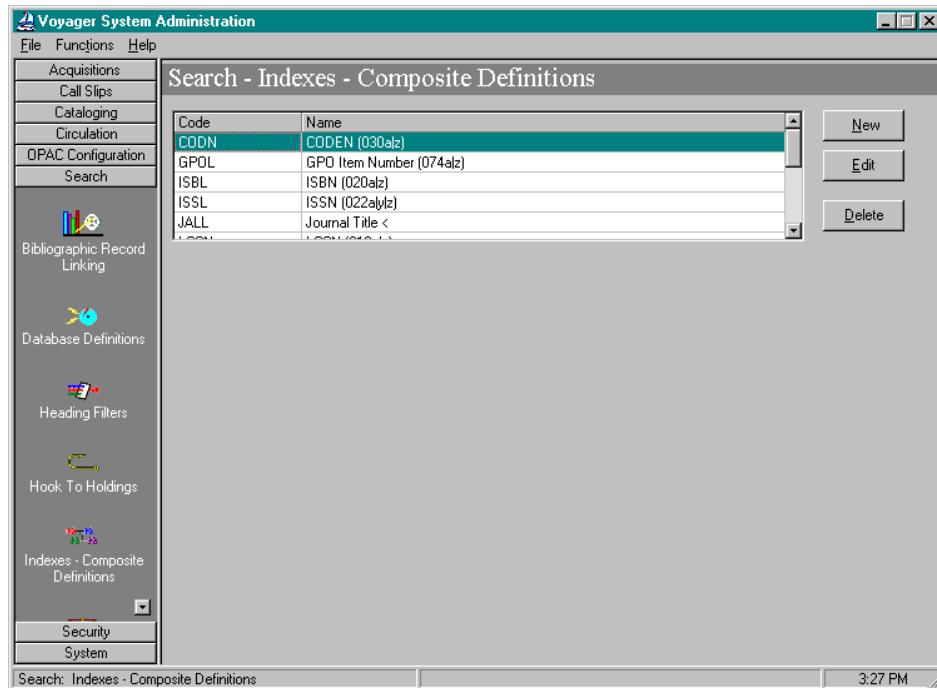
Use the following to delete a profile.

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 8-30](#)).



**Figure 8-30. 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-3](#) 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 8-34](#) on [page 8-53](#).

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 ([Figure 8-35](#)) allows you to select the order in which you want the Titles List to sort when displayed. 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:**

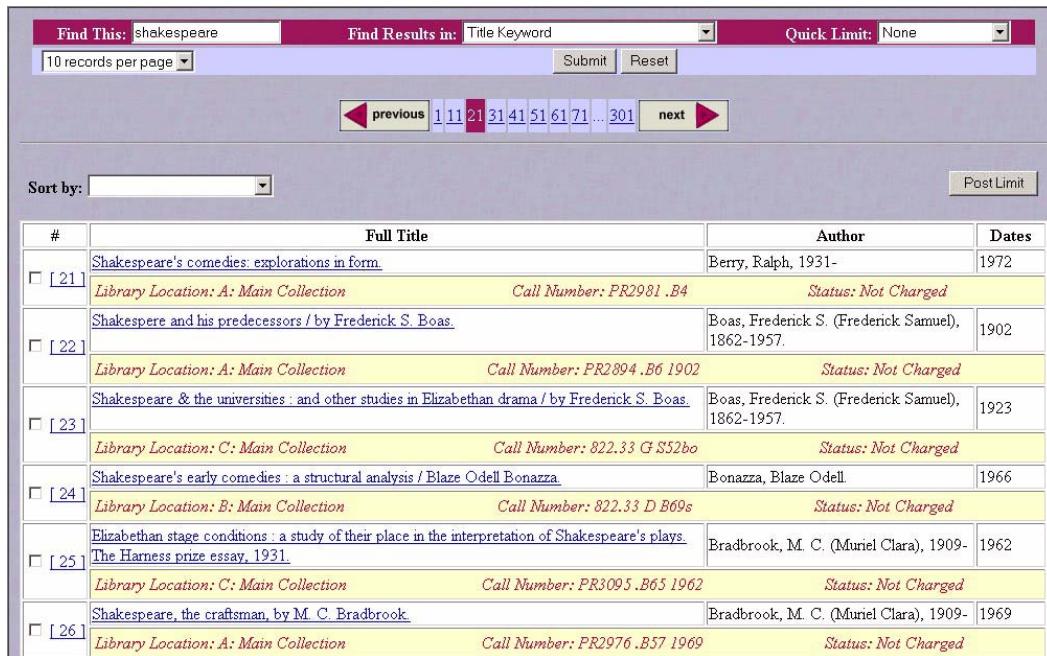
In the case of non-keyword, including composite searches, results are first sorted by the index specific criteria (by title, in a left-anchored title search, for example), and then by the primary, secondary, and tertiary sort order criteria if there are

matches. In other words, non-keyword searches treat the primary, secondary, and tertiary criteria you specify as secondary, tertiary, and quaternary.

Example:

Perform a title keyword search and left-anchored title search both on the term *dog*. Assume that the Primary field in the Sort Order dialog box for those searches is set to *Author*, and the Secondary to *Date Published Ascending*.

- The Title keyword search results sort first by author, then by date published (in ascending order) if any duplicate authors are found (see [Figure 8-31](#)).



The screenshot shows a search results page from a library catalog. The search parameters at the top are: Find This: *shakespeare*, Find Results in: Title Keyword, Quick Limit: None, and 10 records per page. The results are sorted by Author. The table has columns for #, Full Title, Author, and Dates. The results are as follows:

#	Full Title	Author	Dates
[21]	<i>Shakespeare's comedies: explorations in form.</i>	Berry, Ralph, 1931-	1972
[21]	<i>Library Location: A: Main Collection</i> Call Number: PR2981 .B4	Status: Not Charged	
[22]	<i>Shakespere and his predecessors / by Frederick S. Boas.</i>	Boas, Frederick S. (Frederick Samuel), 1862-1957.	1902
[22]	<i>Library Location: A: Main Collection</i> Call Number: PR2894 .B6 1902	Status: Not Charged	
[23]	<i>Shakespeare &amp; the universities : and other studies in Elizabethan drama / by Frederick S. Boas.</i>	Boas, Frederick S. (Frederick Samuel), 1862-1957.	1923
[23]	<i>Library Location: C: Main Collection</i> Call Number: 822.33 G552bo	Status: Not Charged	
[24]	<i>Shakespeare's early comedies : a structural analysis / Blaze Odell Bonazza.</i>	Bonazza, Blaze Odell	1966
[24]	<i>Library Location: B: Main Collection</i> Call Number: 822.33 D B69s	Status: Not Charged	
[25]	<i>Elizabethan stage conditions : a study of their place in the interpretation of Shakespeare's plays.</i>	Bradbrook, M. C. (Muriel Clara), 1909-	1962
[25]	<i>The Harness prize essay, 1931.</i>		
[25]	<i>Library Location: C: Main Collection</i> Call Number: PR3095 .B65 1962	Status: Not Charged	
[26]	<i>Shakespeare, the craftsman, by M. C. Bradbrook.</i>	Bradbrook, M. C. (Muriel Clara), 1909-	1969
[26]	<i>Library Location: A: Main Collection</i> Call Number: PR2976 .B57 1969	Status: Not Charged	

**Figure 8-31. Keyword Title Search Results**

- The Left-Anchored search results will sort first by title, next by author (if any duplicate titles are found), and then by date published (in ascending order, if any duplicate authors are found for that title). See [Figure 8-32](#).

Search Results Displaying 1 to 159 of 159 entries.			
Find This: <input type="text" value="shakespeare"/>		Find Results in: <input type="text" value="Left Anchored Title"/>	Quick Limit: <input type="text" value="None"/>
<input type="button" value="10 records per page"/>		<input type="button" value="Submit"/>	<input type="button" value="Reset"/>
<input type="button" value="previous"/> [ 1 ] [ 11 ] [ 21 ] [ 31 ] [ 41 ] [ 51 ] ... [ 151 ] <input type="button" value="next"/> <input type="button" value="Post Link"/>			
Sort by:	<input type="button" value=""/>		
#	Title <	Author	Date
<input type="checkbox"/> [ 1 ]	Shakespeare / <i>Library Location: C: Main Collection</i>	Brown, Ivor John Carnegie, 1891- Call Number: 822.33 C S52Br Status: Not Charged	1959
<input type="checkbox"/> [ 2 ]	Shakespeare / <i>Library Location: C: Main Collection</i>	Raleigh, Walter Alexander, Sir, 1861-1922. Call Number: PR2894.R3 Status: Not Charged	1907
<input type="checkbox"/> [ 3 ]	Shakespeare & the outer mystery <i>Title has multiple holdings</i>	West, Robert Hunter.	1968
<input type="checkbox"/> [ 4 ]	Shakespeare & the universities : and other studies in Elizabethan drama /	Boas, Frederick S. (Frederick Samuel), 1862-1957	1923

**Figure 8-32. Left-Anchored Title Search Results**

Specifying a Sort Order for Keyword searches only applies if the search is not done under relevance. For information about how to turn relevance on or off for each type of keyword search, see "Search Dialog Stanza" section in the *Voyager WebVoyage User's Guide*.

## Search Results Tab

Selections here 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](#) shows the **Search Results** tab of the **Composite Search Definitions** dialog box.

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.

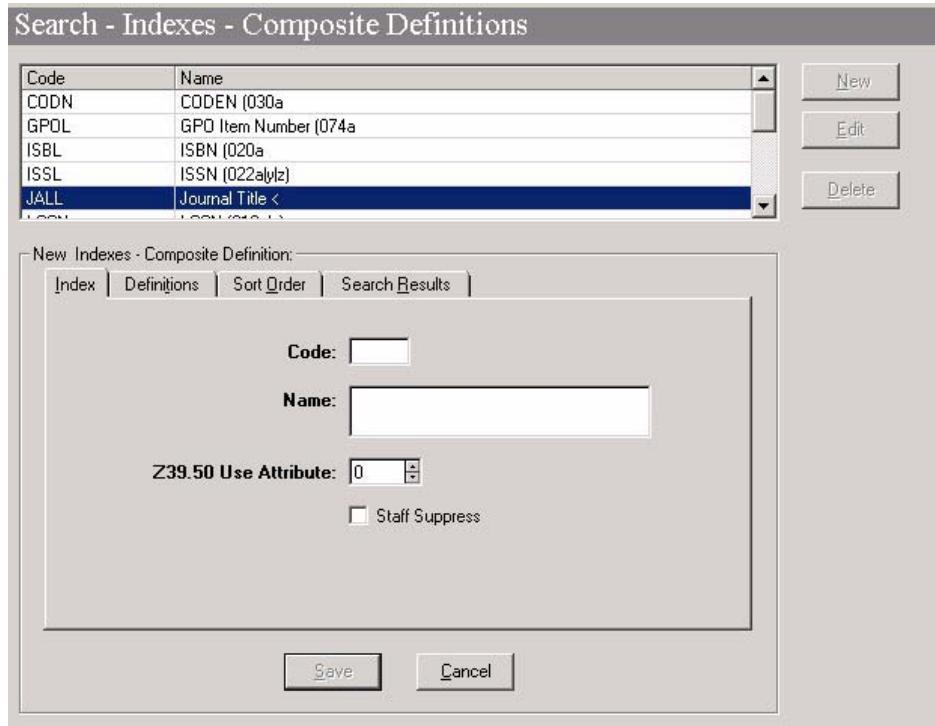
- From the Search menu bar, Select the **Indexes - Composite Definitions** button.

**Result:** Invokes the **Search - Indexes - Composite Definitions** list box (see [Figure 8-30](#)).

If you are...	Then...
Adding a new definition	click the <b>New</b> button
Editing an existing definition	click the <b>Edit</b> button

**Result:** The New Indexes - Composite Definition dialog box displays (see [Figure 8-33](#)).

At any time:	
	<ul style="list-style-type: none"><li>• The <b>Save</b> button saves your information.</li><li>• The <b>Cancel</b> button closes the dialog box without saving.</li></ul>



**Figure 8-33. New Indexes - Composite Definition Dialog Box**

2. Click the **Index** tab.

**Result:** The **Index** dialog box displays (see [Figure 8-33](#)).

On the Index dialog box:

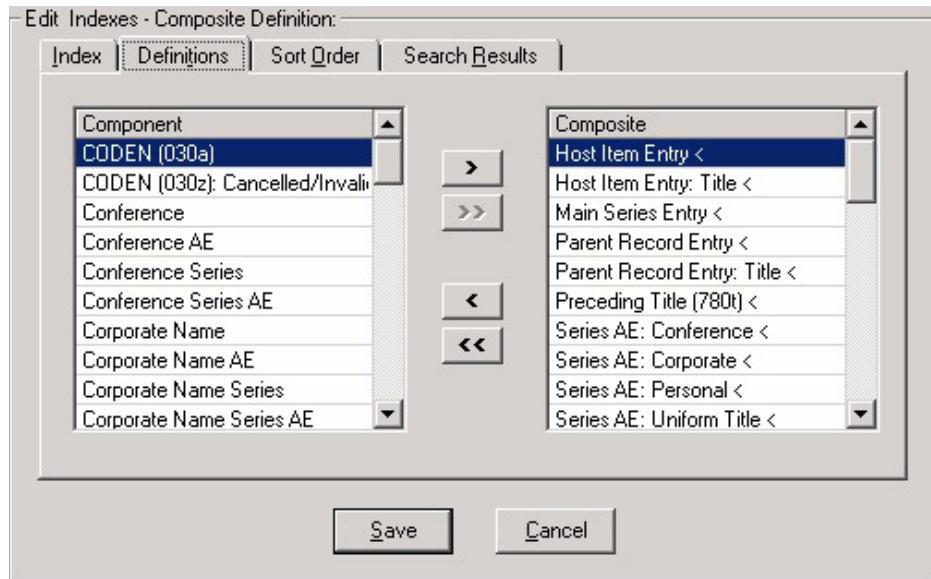
3. Enter a code for the database in the **Code** field (40 characters alphanumeric, maximum).
4. Select the appropriate Z39.50 Use attribute for the database.
5. Select the **Staff Suppress** check box if you do not want a composite search available on the **Index Selection** tab in the staff modules.

Clear the **Staff Suppress** check box to display the composite search definition on the **Index Selection** tab.

6. Click the **Definitions** tab.

**Result:** The **Definitions** dialog box displays (see [Figure 8-33](#)).

---



**Figure 8-34. Definitions Tab**

On the Definitions dialog box:

7. Highlight the desired search(es) in the **Component** list.
8. Click the **>** button to move search(es) to the **Composite** column.

To remove an element from the **Selected** column, highlight the element to remove and click the **<** button.

You can add all of the available groups to the **Selected Access Groups** list by clicking the **>>** button.



**IMPORTANT:**

*At least two searches must be assigned to the composite, for the definition to be saved.*

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.

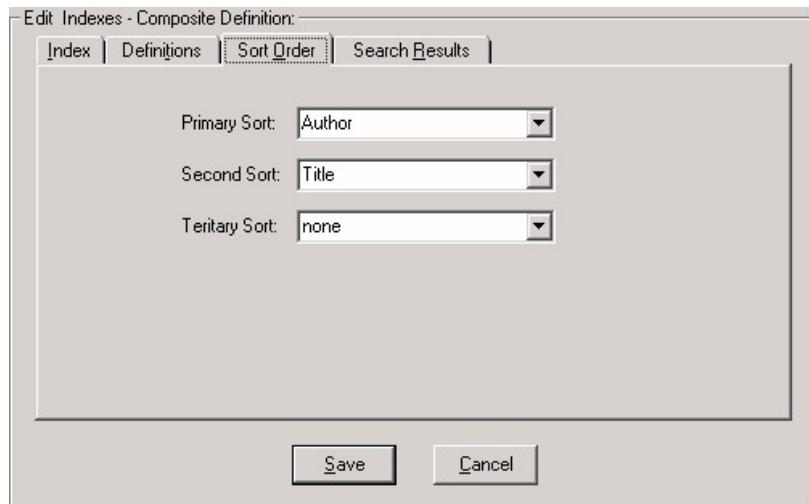
---

To remove all indexes from the **Selected Indexes** list, click the << button. All of the selected indexes move back to the **Available Indexes** list.

9. Select the **Sort Order** tab.

**Result:** Invokes the Sort Order dialog box (see [Figure 8-35](#))

---



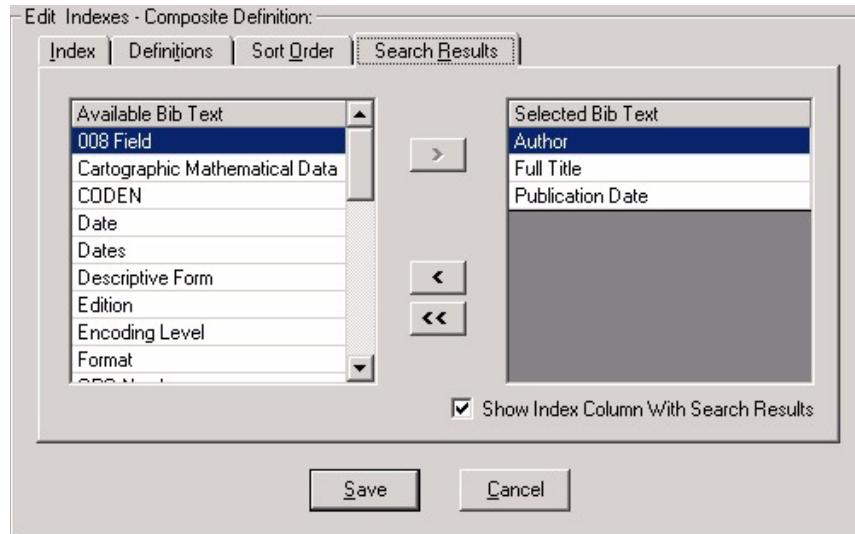
---

**Figure 8-35. Sort Order Tab**

On the Sort Order tab:

10. Select the Primary, Secondary, and Tertiary Sort points.
11. Select the Search Results tab.

**Result:** Invokes the Search Results dialog box (see [Figure 8-36](#)).



**Figure 8-36. Search Results Tab**

On the Search Results dialog box:

12. Highlight the desired bibliographic text component in the **Available Bib Text** list.
13. Click the **>** button to move components to the **Selected Bib Text** column.

**NOTE:**

The columns will display in the order you select them, from left to right, in WebVoyage and the Voyager staff modules, even though they will automatically alphabetize in the Selected Bib Text column once you save the search.

To remove an element from the **Selected Bib Text** column, highlight the element to remove and click the **<** button.

You can add all of the available groups to the **Selected Bib Text** column list by clicking the **>>** button.



**IMPORTANT:**

*At least one component must be assigned to the Selected Bib Text list, for the search to be saved.*

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.

14. To display the index column along with a column heading (the *Name* from the Index tab), select the **Show index column with search result** 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. The fields specified in the Selected Bib Text column appear to the right of the index column (see [Figure 8-37](#)).

The screenshot shows a library catalog search results page. At the top, there are search parameters: 'Find this: dog', 'Find Results in: Local Anchored File', and 'Quick Limit: None'. Below these are buttons for 'Submit' and 'Reset', and navigation links 'previous' and 'next'. A 'Sort by:' dropdown and a 'Post Limit' button are also present. The main area displays a table of search results:

#	Title <	Full Title	Author	Dates
[1]	Dog on the sun : a volume of stories.	Dog on the sun : a volume of stories.	Green, Paul, 1894-1981.	1949
	Library Location: B: Main Collection	Call Number: F G797d	Status: In Transit	
[2]	Dog years /	Dog years / Translated by Ralph Manheim.	Grass, Günter, 1927-	1965
	Library Location: A: Main Collection	Call Number: PZ4.G774 Do	Status: Lost--System Applied	
[3]	Dogmatics.	Dogmatics.	Brunner, Emil, 1889-1966.	1950
	Library Location: B: Main Collection	Call Number: 230 B89	Status: Multiple item statuses	
[4]	Dogmatics in outline /	Dogmatics in outline / [by] Karl Barth. Translated by G. T. Thompson.	Barth, Karl, 1886-1968.	1949
	Library Location: A: Main Collection	Call Number: BT77 .B345	Status: Not Charged	
[5]	Dogsong /	Dogsong / Gary Paulsen.	Paulsen, Gary.	1985
	Library Location: A: Main Collection	Call Number: PZ7.P2843 Do 1985	Status: In Transit	

**Figure 8-37. Index Column and Heading**

To hide the index column and heading, clear the **Show index column with search result** check box. Only the fields specified in the Selected Bib Text column appear in the results (see [Figure 8-38](#)).

The screenshot shows a search results page with the following interface elements:

- Search Parameters:** Find This: dog, Find Results in: Left Anchored Title, Quick Limit: None, 10 records per page, Submit, Reset.
- Navigation:** previous, next.
- Sort Options:** Sort by: (dropdown menu), Post Limit.
- Table of Results:**

#	Full Title	Author	Dates
[1]	Dog years / Translated by Ralph Manheim.	Grass, Gunter, 1927-	1965
[2]	Library Location: A: Main Collection Call Number: PZ4.G774 Do Status: Lost--System Applied Dogmatics in outline / [by] Karl Barth. Translated by G. T. Thompson.	Barth, Karl, 1886-1968.	1949
[3]	Library Location: A: Main Collection Call Number: BT77.B345 Status: Not Charged Dogsong / Gary Paulsen.	Paulsen, Gary.	1985
[4]	Library Location: A: Main Collection Call Number: PZ7.P2843 Do 1985 Status: In Transit Dogmatics.	Brunner, Emil, 1889-1966.	1950
[5]	Library Location: B: Main Collection Call Number: 230 B89 Status: Multiple item statuses Dog on the sun : a volume of stories.	Green, Paul, 1894-1981.	1949
	Library Location: B: Main Collection Call Number: F G797d Status: In Transit		
- Sort Options (Bottom):** Sort by: (dropdown menu), Post Limit.

**Figure 8-38. Results without Index Column**

15. 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.

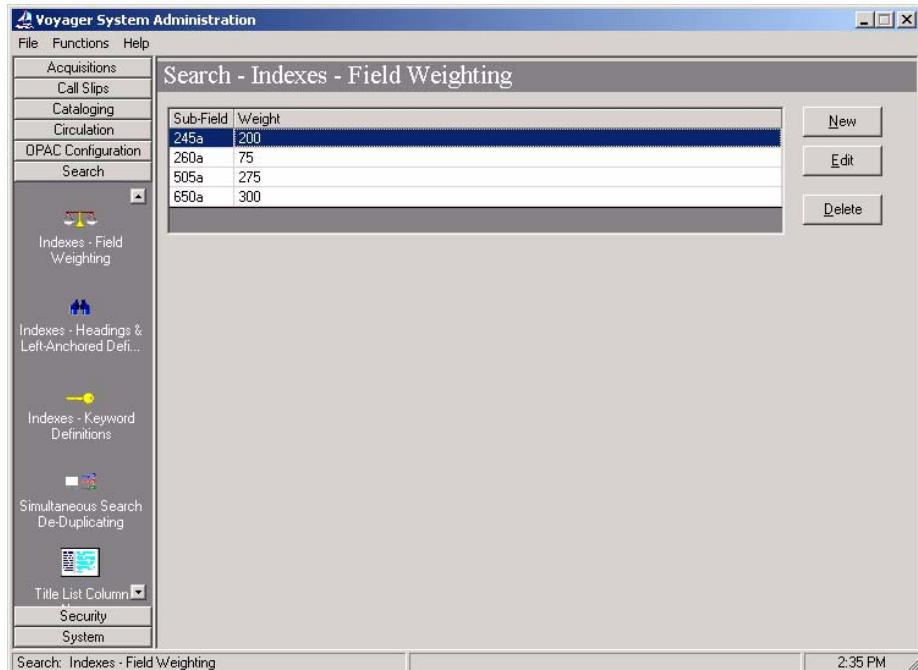
You do not have to define any Keyword Field Weighting. When Voyager is distributed, all fields are weighted at a value of 100.

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.

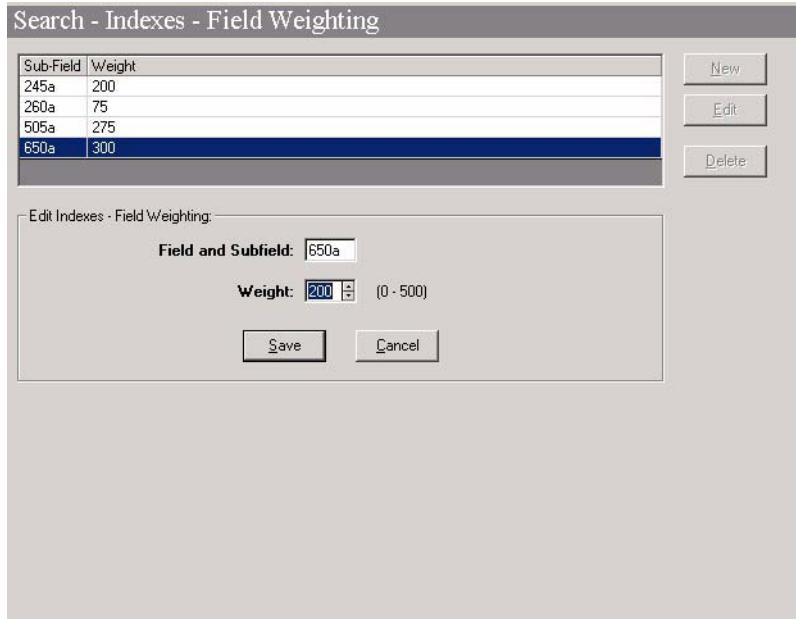
For multiple keyword searches:

- 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 8-39](#) shows the Search - Indexes- Field Weighting main screen and [Figure 8-40](#) shows the Edit Dialog box of the same screen.



**Figure 8-39.** Indexes - Field Weighting Dialog Box



---

Figure 8-40. 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.

Example:

For example, to have a relevance ranked search return more results with the search term in the subject field (than in the title field for example) leave the relevance of the 245a at 100 and set the relevance of the 650a to 200.

[Figure 8-41](#) shows the search results of a keyword relevance search performed with the search term of *Philosophy*. The most relevant results all have the word *Philosophy* in the title (the 245a).

If your patrons tend to perform keyword searches on general subject terms, you can give a higher weight to the 650a Subject field. The results will look more like those in [Figure 8-42](#) ([Figure 8-43](#) shows the search term in the 650a of one of the records)

The screenshot shows a search interface with the following fields: 'Find This:' (text input), 'Find Results in:' (dropdown menu set to 'Keyword Relevance Search'), 'Quick Limit:' (dropdown menu set to 'None'), and a 'Submit' button. Below these are dropdown menus for '10 records per page' and 'Post Limit'. The search results table has columns: '#', 'Relevance' (represented by a red bar chart icon), 'Full Title', 'Author', and 'Format'. The results are as follows:

#	Relevance	Full Title	Author	Format
[1]		<a href="#">Islamic philosophy and theology.</a> <i>Library Location: Main Collection</i> <i>Call Number: DS36.85 .I8 no. 1</i> <i>Status: Not Charged</i>	Watt, W. Montgomery (William Montgomery)	Book
[2]		<a href="#">Source book in Chinese philosophy.</a> <i>Library Location: Main Collection</i> <i>Call Number: B125 .C45</i> <i>Status: Not Charged</i>	Chan, Wing-sit, 1901-	Book
[3]		<a href="#">Philosophy in the twentieth century, an anthology. Edited and with introductions by William Barrett and Henry D. Aiken.</a> <i>Library Location: Main Collection</i> <i>Call Number: B804 .B36 1962</i> <i>Status: Multiple item statuses</i>	Barrett, William, 1913-	Book
[4]		<a href="#">New world of philosophy.</a> <i>Library Location: Main Collection</i> <i>Call Number: B804 .K3</i> <i>Status: Not Charged</i>	Kaplan, Abraham, 1918-	Book
		<a href="#">History of philosophy.</a>	Windelband, W. (Wilhelm), 1848- 1915	Book

**Figure 8-41.** Search results with a Higher Weight in the Title Field

## Search Configuration

---

Database Name: Endeavor Information Systems Search Request: Keyword Relevance Search = philosophy Search Results: Displaying 1 through 10 of 1356 entries.					
Find This: <input type="text" value="philosophy"/>		Find Results in: <input type="text" value="Keyword Relevance Search"/>		Quick Limit: <input type="text" value="None"/>	
<input type="checkbox"/> 10 records per page				Submit	Reset
<a href="#"> previous</a> <a href="#">1</a> <a href="#">11</a> <a href="#">21</a> <a href="#">31</a> <a href="#">41</a> <a href="#">51</a> ... <a href="#">1351</a> <a href="#">next </a>					
Sort by: <input type="text" value="Relevance"/>					
#	Relevance	Full Title	Author	Format	
<input type="checkbox"/> [1]		<a href="#">History of Christian philosophy in the Middle Ages.</a>	Gilson, Etienne, 1884-1978.	Book	
		<i>Library Location: Main Collection Call Number: B72 .G48 Status: Not Charged</i>			
<input type="checkbox"/> [2]		<a href="#">Love, power, and justice; ontological analyses and ethical applications. Given as Firth lectures in Nottingham, England, and as Sprunt lectures in Richmond, Virginia.</a>	Tillich, Paul, 1886-1965.	Book	
		<i>Library Location: Main Collection Call Number: BV4633 .T5 Status: Not Charged</i>			
<input type="checkbox"/> [3]		<a href="#">Measure of man: on freedom, human values, survival, and the modern temper.</a>	Krutch, Joseph Wood, 1893-1970.	Book	
		<i>Library Location: Main Collection Call Number: B804 .K68 Status: Not Charged</i>			
<input type="checkbox"/> [4]		<a href="#">Chinese thought, from Confucius to Mao Tsé-tung.</a>	Creel, Herrlee Glessner, 1905-	Book	

Figure 8-42. Search results with a Higher Weight in the Subject Field

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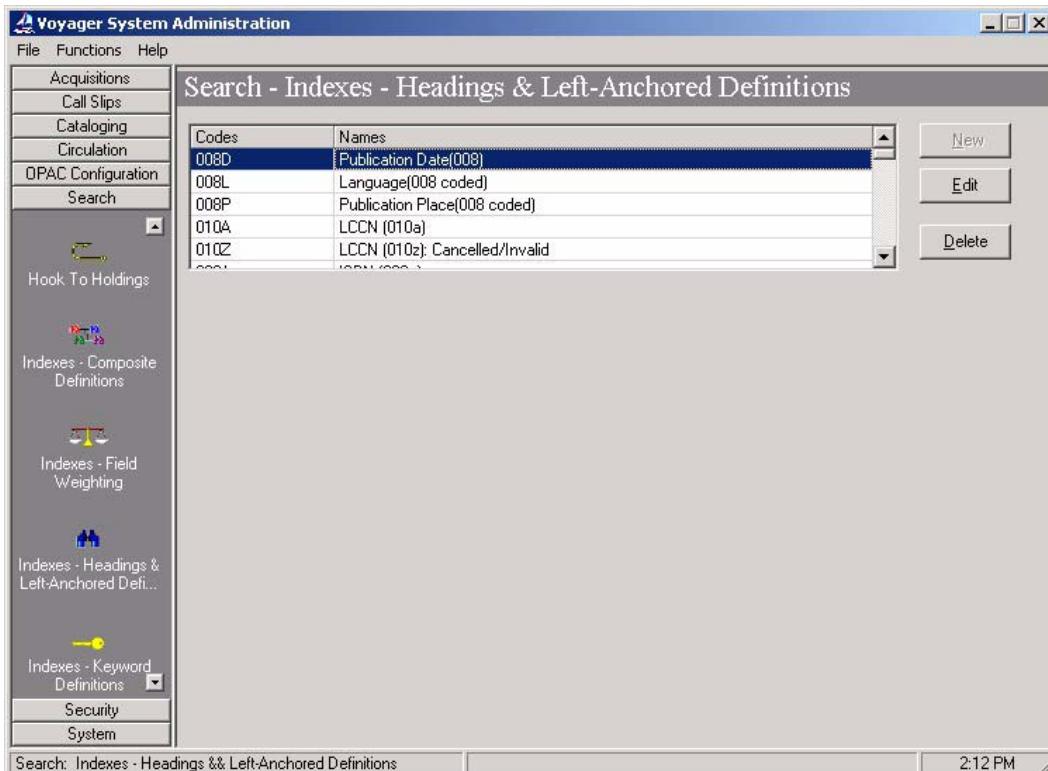
Bibliographic Holdings Table of Contents Linked Resources MARC Format					
<a href="#">previous</a> <a href="#">next </a>					
<i>Love, power, and justice; ontological analyses and ethical applications....</i>					
<b>Relevance:</b>					
000 00645nam 22002051 45@ 001 1177 008 721213s1954 nyu 000 0 eng 010 __  a 54006522 035 __  a 54006522 /L 049 __  a SHCM 050 0 _  a BV4633  b .T5 082 __  a 241 092 __  a 241 T57 100 1 _  a Tillich, Paul,  d 1886-1965. 245 10  a Love, power, and justice;  b ontological analyses and ethical applications.  c Given as Firth lectures in Nottingham, England, and as Sprunt lectures in Richmond, Virginia. 260 __  a New York,  b Oxford University Press,  c 1954. 300 __  a 127 p.  c 20 cm. 650 _0  a Love. 650 _0  a Power (Philosophy) 650 _0  a Justice.					

Figure 8-43. Search Term in Subject Field

---

## **Indexes - Headings & Left-Anchored Definitions**

You can customize single Headings and left-anchored searches by selecting **Search** on the System Administration side menu, then clicking the **Headings & Left-Anchored Definitions** button (see [Figure 8-30](#)).



**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:**

*The Add button is inactive. You cannot add any search definitions. Be sure to consider carefully whether you want to delete any of your search definitions. If you delete a search definition, you cannot add it back using the Add button.*

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 here 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.

### Sort Order Tab

---

The **Sort Order** tab ([Figure 8-35](#)) allows you to select the order in which you want the Titles List to sort when displayed. 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.

Example:

Perform a title keyword search and left-anchored title search both on the term *dog*. Assume that the Primary field in the Sort Order dialog box for those searches is set to *Author*, and the Secondary to *Date Published Ascending*.

- The Title keyword search results sort first by author, then by date published (in ascending order) if any duplicate authors are found (see [Figure 8-45](#)).



The screenshot shows a library catalog search results page. At the top, there are search fields for 'Find This:' (shakespeare), 'Find Results in:' (Title Keyword), and 'Quick Limit' (None). Below these are buttons for 'Submit' and 'Reset'. A dropdown menu shows '10 records per page'. The main area displays a table of search results with columns for '#', Full Title, Author, and Dates. The results are sorted by author (Berry, Ralph, 1931-) and date (1972). The table includes the following rows:

#	Full Title	Author	Dates
[21]	Shakespeare's comedies: explorations in form. Library Location: A: Main Collection Call Number: PR2981 .B4	Berry, Ralph, 1931-	1972
[22]	Shakespere and his predecessors / by Frederick S. Boas. Library Location: A: Main Collection Call Number: PR2894 .B6 1902	Boas, Frederick S. (Frederick Samuel), 1862-1957.	1902
[23]	Shakespeare & the universities : and other studies in Elizabethan drama / by Frederick S. Boas. Library Location: C: Main Collection Call Number: 822.33 G552bo	Boas, Frederick S. (Frederick Samuel), 1862-1957.	1923
[24]	Shakespeare's early comedies : a structural analysis / Blaze Odell Bonazza. Library Location: B: Main Collection Call Number: 822.33 D869s	Bonazza, Blaze Odell	1966
[25]	Elizabethan stage conditions : a study of their place in the interpretation of Shakespeare's plays. The Harness prize essay, 1931. Library Location: C: Main Collection Call Number: PR3095 .B65 1962	Bradbrook, M. C. (Muriel Clara), 1909-	1962
[26]	Shakespeare, the craftsman, by M. C. Bradbrook. Library Location: A: Main Collection Call Number: PR2976 .B57 1969	Bradbrook, M. C. (Muriel Clara), 1909-	1969

**Figure 8-45. Keyword Title Search Results**

- The Left-Anchored search results will sort first by title, next by author (if any duplicate titles are found), and then by date published (in ascending order, if any duplicate authors are found for that title). See [Figure 8-46](#).

Search Results Displaying 1 to 89 of 159 entries.			
Find This: <input type="text" value="shakespeare"/>		Find Results in: <input type="text" value="Left Anchored Title"/>	Quick Limit: <input type="text" value="None"/>
<input type="button" value="10 records per page"/>		<input type="button" value="Submit"/>	<input type="button" value="Reset"/>
<a href="#"> previous</a> <a href="#">1</a> <a href="#">11</a> <a href="#">21</a> <a href="#">31</a> <a href="#">41</a> <a href="#">51</a> ... <a href="#">151</a> <a href="#">next</a> <a href="#"></a>			
Sort by:	<input type="button" value=""/>		<input type="button" value="Post Lir"/>
#	Title <	Author	Date
<input type="checkbox"/> [1]	Shakespeare / <i>Library Location: C: Main Collection</i>	Brown, Ivor John Carnegie, 1891- Call Number: 822.33 C S52Br Status: Not Charged	1959
<input type="checkbox"/> [2]	Shakespeare / <i>Library Location: C: Main Collection</i>	Raleigh, Walter Alexander, Sir, 1861-1922. Call Number: PR2894.R3 Status: Not Charged	1907
<input type="checkbox"/> [3]	Shakespeare & the outer mystery <i>Title has multiple holdings</i>	West, Robert Hunter.	1968
<input type="checkbox"/> [4]	Shakespeare & the universities : and other studies in Elizabethan drama /	Boas, Frederick S. (Frederick Samuel), 1862-1957	1923

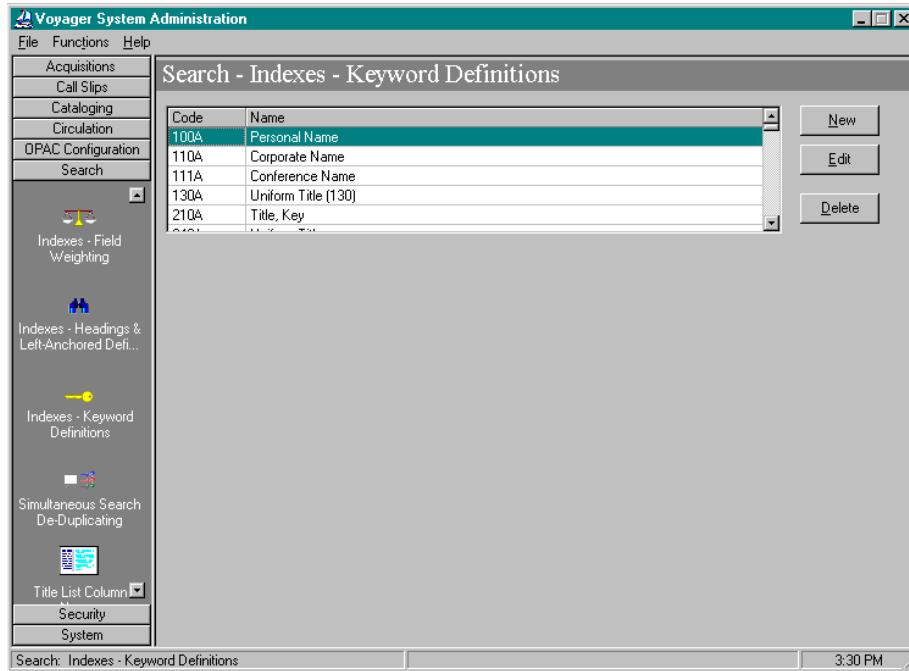
**Figure 8-46. Left-Anchored Title Search Results**

Specifying a Sort Order for Keyword searches only applies if the search is not done under relevance. For information about how to turn relevance on or off for each type of keyword search, see the "Search Dialog Stanza" section in the *Voyager WebVoyage User's Guide*.

## Definitions Tab

The Definitions tab cannot be edited for Headings and Left-Anchored Indexes.

## Keyword Definitions



**Figure 8-47. Search - Indexes - Keyword Definitions**

You can define composite searches by selecting **Search** on the System Administration side menu, then clicking the **Indexes - Keyword Definitions** button (see [Figure 8-47](#)).

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 and corresponding dialog boxes ([Figure 8-50](#) on [page 8-72](#)):

- 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 ([Figure 8-35](#)) allows you to select the order in which you want the Titles List to sort when displayed. 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.

Example:

Perform a title keyword search and left-anchored title search both on the term *dog*. Assume that the Primary field in the Sort Order dialog box for those searches is set to *Author*, and the Secondary to *Date Published Ascending*.

- The Title keyword search results sort first by author, then by date published (in ascending order) if any duplicate authors are found (see [Figure 8-31](#)).

Find This: <input type="text" value="shakespeare"/>				Find Results in: <input type="text" value="Title Keyword"/>	Quick Limit: <input type="text" value="None"/>	
<input type="checkbox"/> 10 records per page				<input type="button" value="Submit"/>	<input type="button" value="Reset"/>	
				<input type="button" value="previous"/>	<input type="button" value="next"/>	
Sort by: <input type="text"/>						<input type="button" value="Post Limit"/>
#	Full Title	Author	Dates			
[ 21 ]	Shakespeare's comedies: explorations in form. <i>Library Location: A: Main Collection</i>	Berry, Ralph, 1931-	1972			
[ 22 ]	Shakespeare and his predecessors / by Frederick S. Boas. <i>Library Location: A: Main Collection</i>	Boas, Frederick S. (Frederick Samuel), 1862-1957.	1902			
[ 23 ]	Shakespeare & the universities : and other studies in Elizabethan drama / by Frederick S. Boas. <i>Library Location: C: Main Collection</i>	Boas, Frederick S. (Frederick Samuel), 1862-1957.	1923			
[ 24 ]	Shakespeare's early comedies : a structural analysis / Blaze Odell Bonazza. <i>Library Location: B: Main Collection</i>	Bonazza, Blaze Odell.	1966			
[ 25 ]	Elizabethan stage conditions : a study of their place in the interpretation of Shakespeare's plays. The Harness prize essay, 1931. <i>Library Location: C: Main Collection</i>	Bradbrook, M. C. (Muriel Clara), 1909-	1962			
[ 26 ]	Shakespeare, the craftsman, by M. C. Bradbrook. <i>Library Location: A: Main Collection</i>	Bradbrook, M. C. (Muriel Clara), 1909-	1969			

**Figure 8-48. Keyword Title Search Results**

- The Left-Anchored search results will sort first by title, next by author (if any duplicate titles are found), and then by date published (in ascending order, if any duplicate authors are found for that title). See [Figure 8-48](#).

Showing records. Displaying 1 through 10 of 159 entries.

Find This:  Find Results in:  Quick Limit:

10 records per page

[previous](#) [1](#) [11](#) [21](#) [31](#) [41](#) [51](#) ... [151](#)  [next](#)

Sort by:

#	Title <	Author	Date
<input type="checkbox"/> [1]	Shakespeare / <i>Library Location: C: Main Collection</i>	Brown, Ivor John Carnegie, 1891-	1959
<input type="checkbox"/> [2]	Shakespeare / <i>Library Location: C: Main Collection</i>	Raleigh, Walter Alexander, Sir, 1861-1922.	1907
<input type="checkbox"/> [3]	Shakespeare & the outer mystery <i>Title has multiple holdings</i>	West, Robert Hunter.	1968
<input type="checkbox"/> [4]	Shakespeare & the universities : and other studies in Elizabethan drama /	Boas, Frederick S. (Frederick Samuel),	1862-1957

**Figure 8-49. Left-Anchored Title Search Results**

**NOTE:**

Specifying a Sort Order for Keyword searches only applies if the search is not done under relevance. For information about how to turn relevance on or off for each type of keyword search, see the "Search Dialog Stanza" section in the *Voyager WebVoyage User's Guide*.

## 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 Composite Search Definition

---

Use the following to add or edit a Composite Search Definition.

1. From the Search menu bar, Select the **Indexes - Keyword Definitions** button.

**Result:** Invokes the **Search - Indexes - Keyword Definitions** list box (see [Figure 8-47](#)).

---

**If you are...****Then...**

Adding a new definition

click the **New** button

**Result:** The New Indexes - Keyword Definition dialog box displays (see [Figure 8-50](#)).

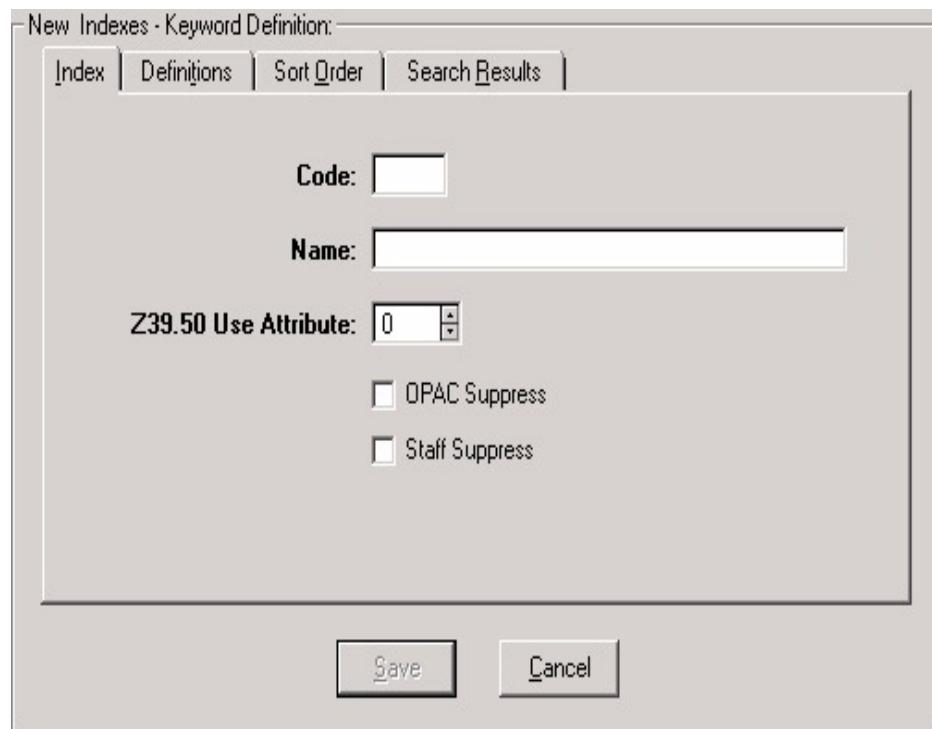
Editing an existing definition

click the **Edit** button

**Result:** The Edit Indexes - Keyword Definition dialog box displays.

At any time:

- The **Save** button saves your information.
  - The **Cancel** button closes the dialog box without saving.
- 



---

**Figure 8-50.** New Indexes - Keyword Definition Dialog Box

2. Click the **Index** tab.

**Result:** The **Index** dialog box displays (see [Figure 8-50](#)).

On the Index dialog box:

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. Select the **OPAC Suppress** check box if you do not want a Keyword search available from the OPAC (including WebVoyage).

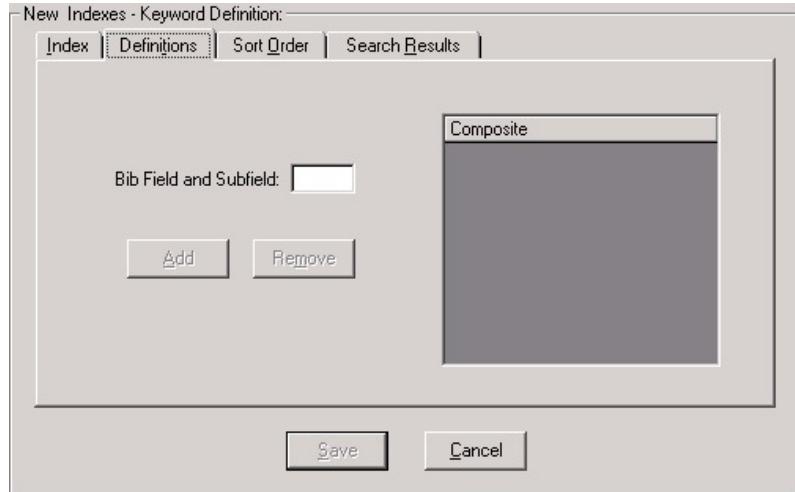
Clear the **Staff Suppress** check box to display the composite search definition in the OPAC (including WebVoyage).

6. 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.

7. Click the **Definitions** tab.

**Result:** The **Definitions** dialog box displays (see [Figure 8-51](#)).



**Figure 8-51. Definitions Tab**

On the Definitions dialog box:

8. Enter the desired field and subfield in the **Bib Field and Subfield** field.
9. 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.

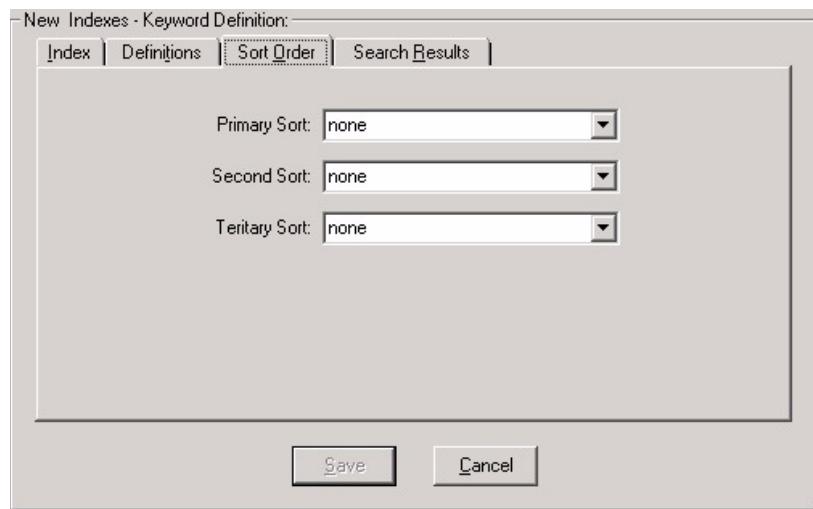


**IMPORTANT:**

*At least one field and subfield combination must be assigned to the composite, for the definition to be saved.*

10. Select the **Sort Order** tab.

**Result:** Invokes the Sort Order dialog box (see [Figure 8-52](#))



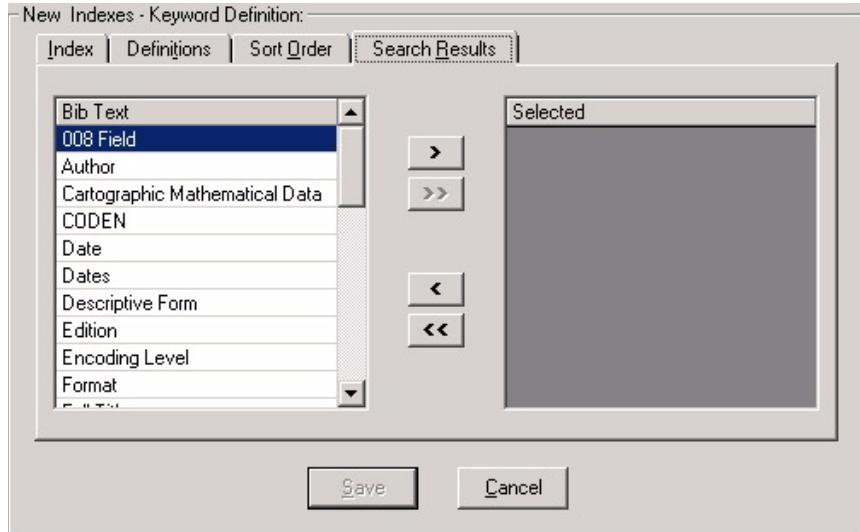
---

**Figure 8-52. Sort Order Tab**

On the Sort Order tab:

11. Select the Primary, Secondary, and Tertiary Sort points.
12. Select the Search Results tab.

**Result:** Invokes the Search Results dialog box (see [Figure 8-53](#)).



**Figure 8-53. Search Results Tab**

On the Search Results dialog box:

13. Highlight the desired bibliographic text component in the **Bib Text** list.
14. 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, even though they will automatically alphabetize in the Selected column once you save the search.

To remove an element from the **Selected** column, highlight the element to remove and 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 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.

15. The **Save** button saves your information.

The **Cancel** button closes the dialog box without saving.

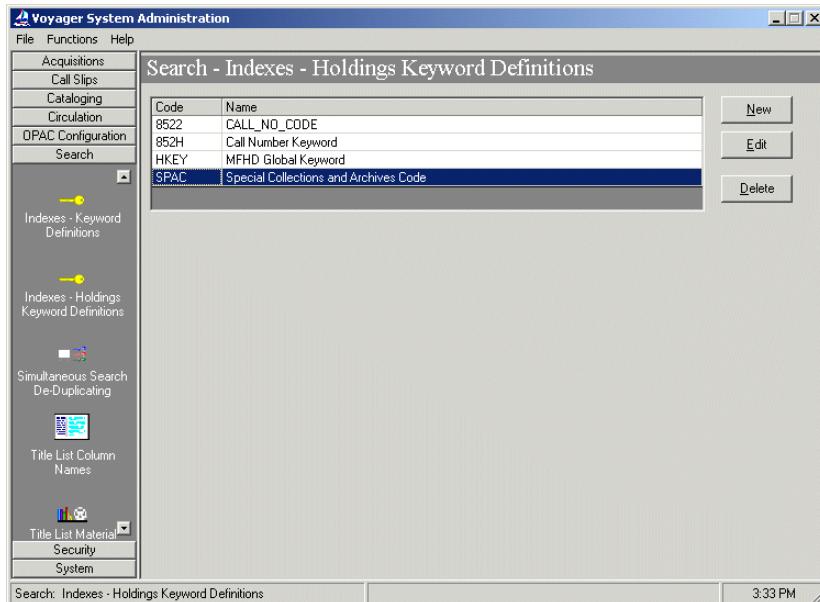
---

## **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**

**NOTE:**

Holdings Keyword searches are not available in WebVoyage.

---

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 Composite Search Definition

---

Use the following to add or edit a Composite Search Definition.

1. From the **Search** menu bar, Select the **Indexes - Holdings Keyword Definitions** button.

**Result:** Invokes the appropriate list box (see Figure 1-2).

**If you are ...**

**Then ...**

Adding a  
new  
definition

click the **New** button

**Result:** The **New Keyword Definition** dialog box appears.

---

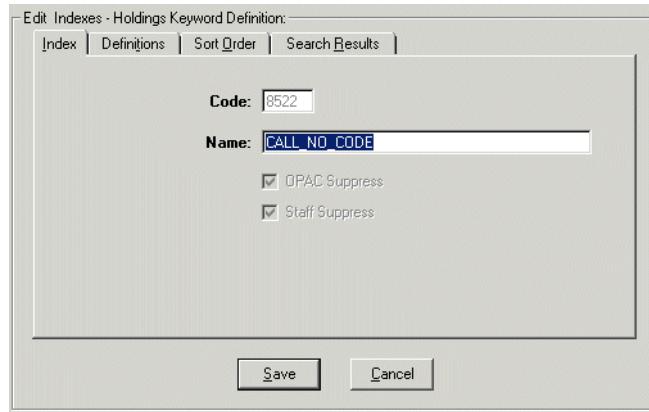
Editing an  
existing  
definition

click the **Edit** button

**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.



---

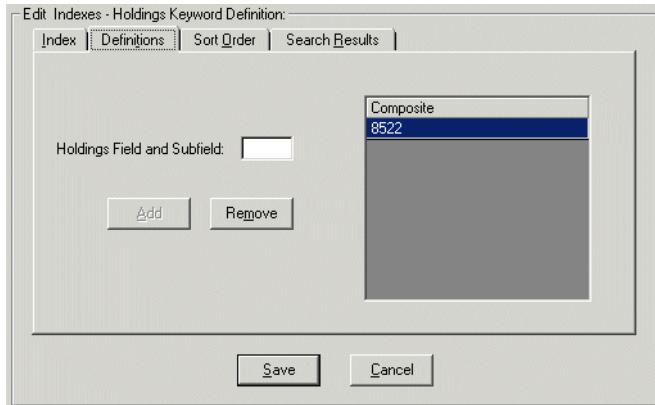
**Figure 8-55. New Indexes - Holdings Keyword Definition Dialog Box**

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.

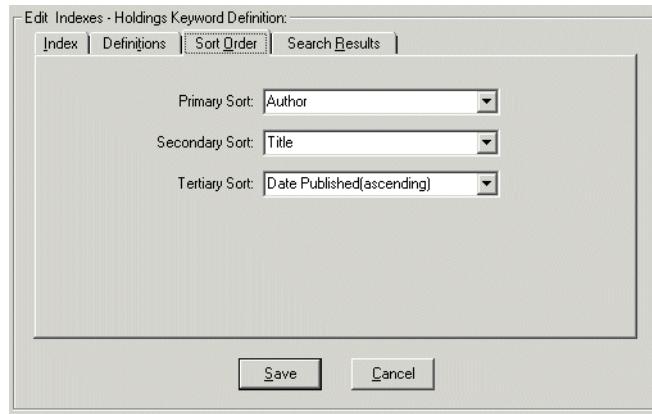


**IMPORTANT:**

*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](#)).



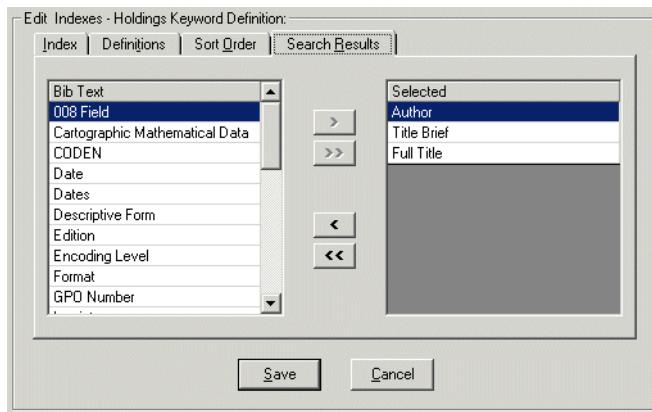
---

**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.

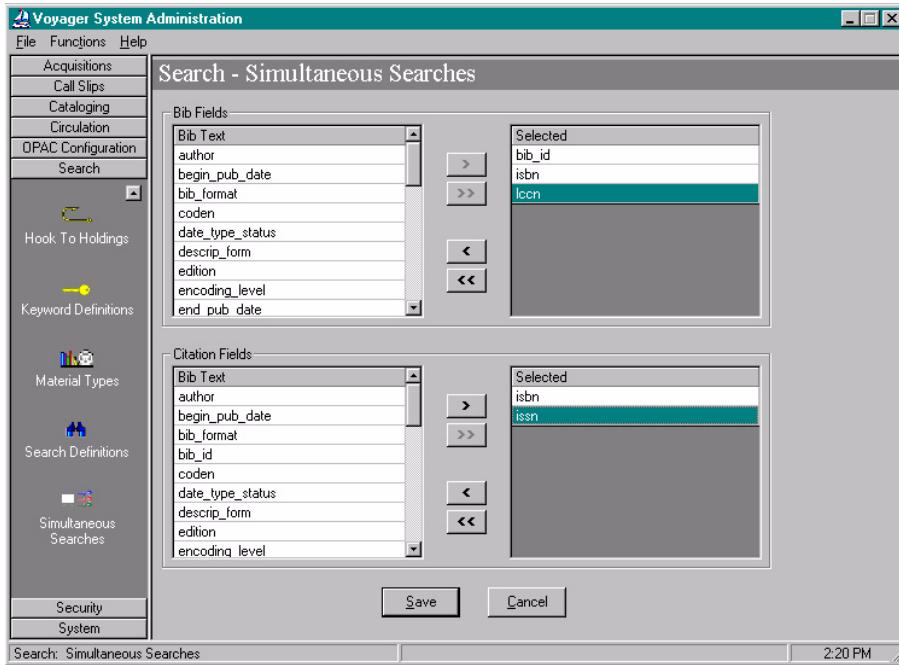
14. Click the **Save** button to save your information. Otherwise, click the **Cancel** button to close the dialog box without saving.

## **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.

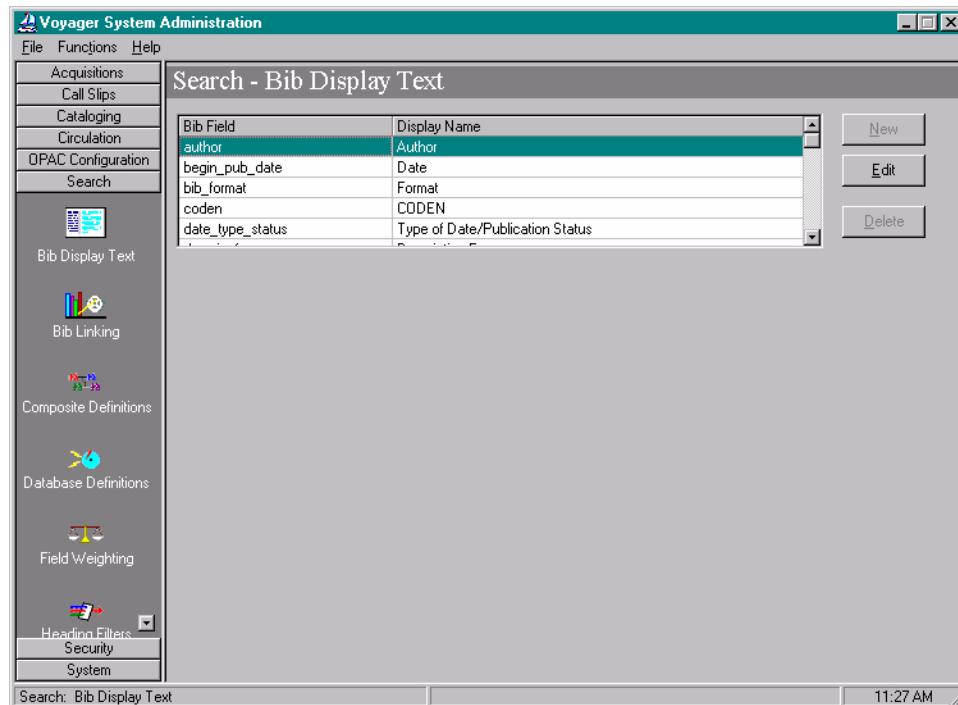
The Bib Fields boxes will instruct the simultaneous searching function to check for duplicate fields when searching records in the remote (Voyager to Voyager) databases.

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.** Bib Display Text Screen

The Display Name displays at the top of the Title View as the result of a search (see [Figure 8-61](#) for example).

The screenshot shows a search results page from WebVoyage. At the top, there are navigation buttons for 'previous' and 'next'. Below that is a 'Sort by:' dropdown menu and a 'Post Limit' button. The main area displays a table with four columns: '#', 'Full Title', 'Author', and 'Format'. There are two rows of results:

#	Full Title	Author	Format
<input type="checkbox"/> [1]	<a href="#">Caring for photographs: display, storage, restoration, by the editors of Time-Life Books.</a> <i>Library Location: Main Collection</i> <i>Call Number: TR465 .T55</i> <i>Status: Not Charged</i>	Time-Life Books.	Book
<input type="checkbox"/> [2]	<a href="#">Current cites [computer file].</a> <i>No Holdings Available</i>		
	<a href="#">Drama of display : visual merchandising and its techniques.</a>	Buckley, Jim.	Book

Figure 8-61. Title List Column Names on Title List in WebVoyage

**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 8-45](#), [Indexes - Headings & Left-Anchored Definitions](#) on [page 8-62](#), or [Keyword Definitions](#) on [page 8-67](#).



#### Procedure 8-13. Editing Title List Column Names

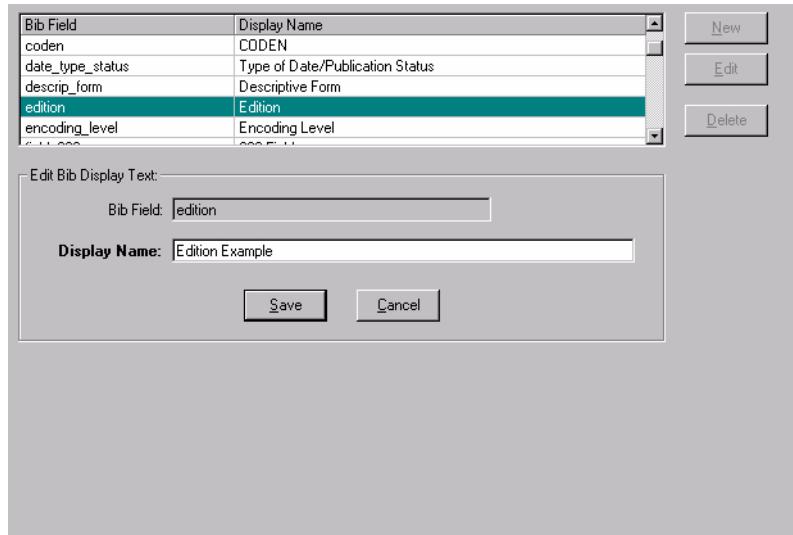
1. From the Search menu bar, Select the **Title List Column Names** button.

---

**Result:** Invokes the **Search - Indexes - Keyword Definitions** list box (see [Figure 8-60](#)).

At any time:

- The **Save** button saves your information.
  - The **Cancel** button closes the dialog box without saving.
- 



**Figure 8-62. 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 8-62](#)).

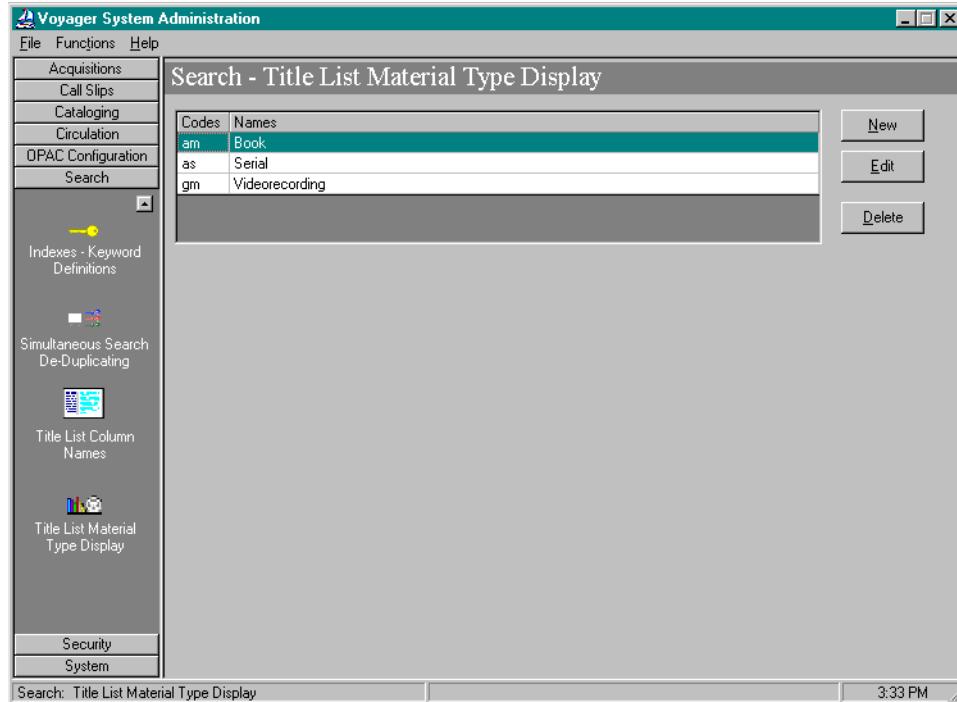
**NOTE:**

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 8-63](#)).



**Figure 8-63. 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 8-60](#)).

If you are... Then...

---

Adding a new material type click the **New** button

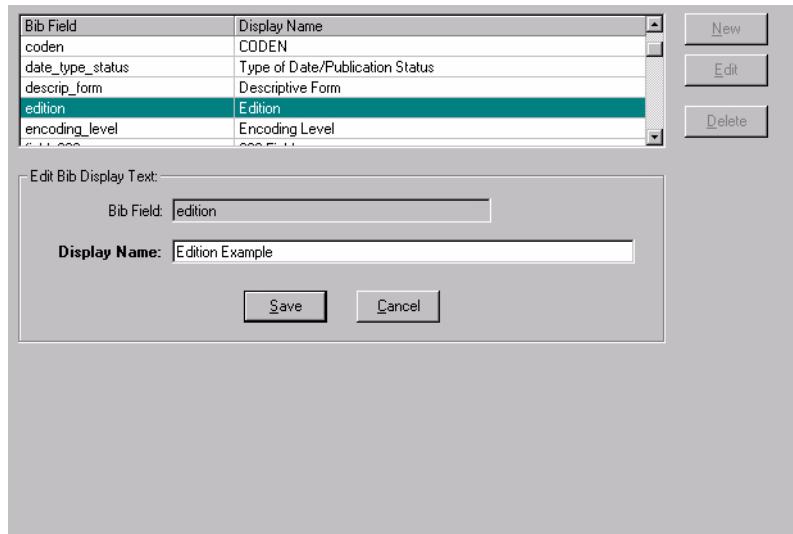
**Result:** The New Title List Material Type Display dialog box displays (see [Figure 8-64](#)).

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.
- 



**Figure 8-64.** Sample Bib Display Text Definition

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.
-

---

[REDACTED]

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# Security

# 9

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### Introduction

---

The Security section of the System Administration module defines all the operators who will use the system. Also, security profiles are created which determine the activities each operator can perform.

This chapter will discuss the following:

- Overview of Security
- Common Elements of all Security Profiles
- Locations and Security
- Operator Profiles - Creating, Editing, and Deleting
- Master Security Profiles - Creating, Editing, and Deleting
- Acquisitions/Serial Policy Profiles - Creating, Editing, and Deleting
- Cataloging Policy Profiles - Creating, Editing, and Deleting
- Circulation Policy Profiles - Creating, Editing, and Deleting
- Analyzer Policy Profiles - Creating, Editing, and Deleting

## **Overview of Security**

---

Voyager security features help to protect the integrity of your library database against unauthorized operators. Use the security portion of the System Administration module to

- Identify what persons will use the staff modules by creating an Operator Profile for each person.
- 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/Password to one or more of the Security Profiles.

### **Logging in to the System Administration Module for the First Time**

---

Endeavor has created a permanent Operator Profile, named System Administrator, 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](#)).

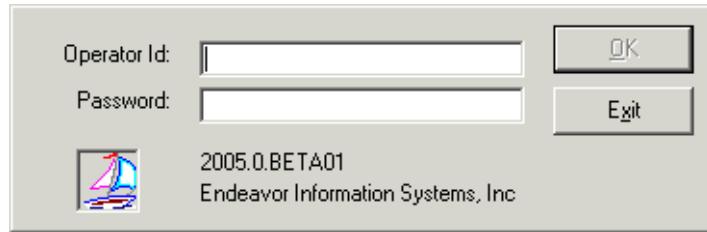
**Operator ID:**SYSADMIN

**Password:**EISI

**NOTE:**

Operator IDs and Passwords are case sensitive. Use uppercase when entering them in the fields. Also, the system displays asterisks when entering a password.

---



---

**Figure 9-1. System Administration Login Dialog Box**

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 (see [Figure 9-2](#)). 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 9-23](#).



---

**Figure 9-2. Security Listbar**

The **Acquisitions/Serials, Cataloging, Circulation Profiles, 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 will 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**

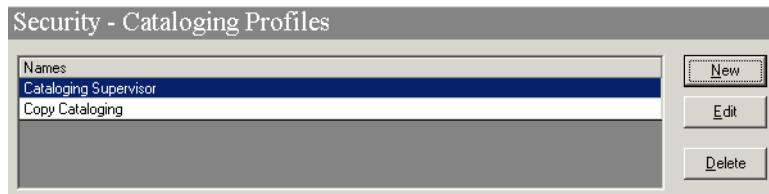
---

The various Security Profiles (Acquisitions/Serials, Analyzer, Cataloging, Circulation, and Master) define which operators are allowed to perform what activities.

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 are defined on the **Profile Values** tab.
- The locations associated with the profile which is defined on the **Locations** tab.

When first accessing a profile workspace, a list of current profiles displays. The example in [Figure 9-3](#) shows two cataloging profiles listed.

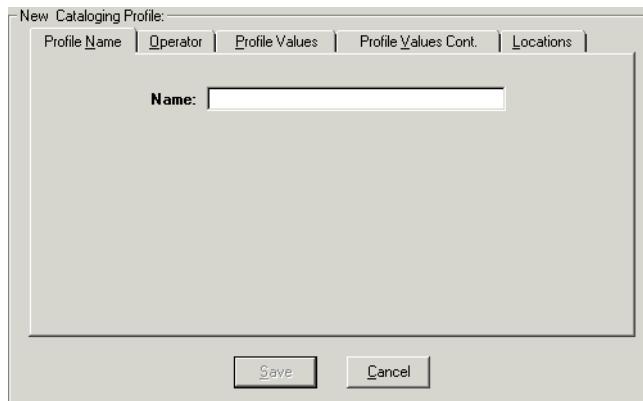


**Figure 9-3. Security - Cataloging Profiles Workspace List of Profiles**

At this point, operators can choose to create a new profile or edit a current profile.

In either case, 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 9-4](#)).

These tabs are common to all the security profile workspaces. The contents and functions of the tabs are essentially the same as well.



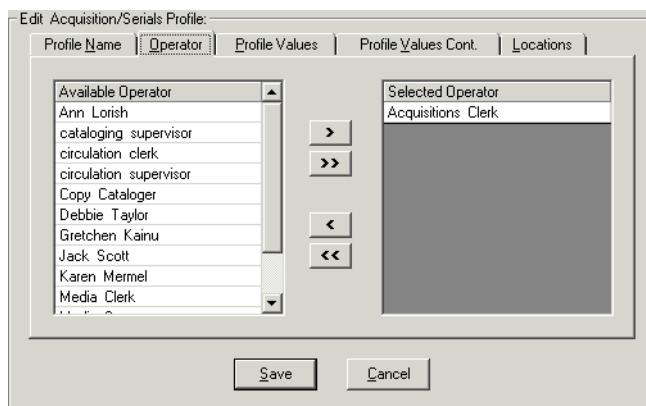
**Figure 9-4. Bottom Half of the Cataloging Profile Workspace**

[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	<p>The name given to the Security Profile.</p> <p>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.</p> <p>Profile Names sort in A-Z order when the system displays a list.</p>	Yes	<p>Alphanumeric, punctuation and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>25 characters.</p>

[Figure 9-5](#) 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 9-5. 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.  <a href="#">Operator Profiles - Creating, Editing and Deleting</a> on <a href="#">page 9-15</a> .
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 9-6](#) is an example of the **Profile Value** 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.

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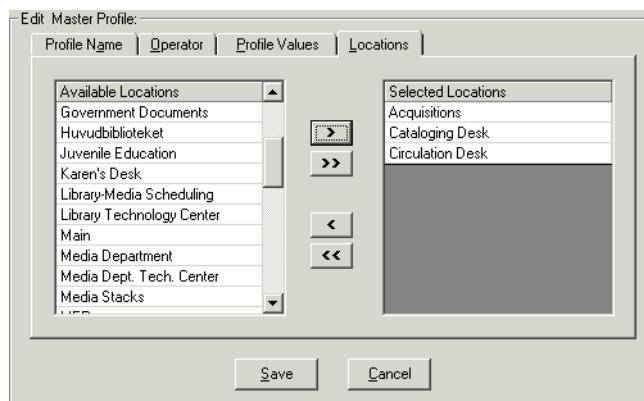
**Figure 9-6. Profile Values Tab for a Circulation Profile**

[Table 9-6](#) explains the **Profile Value** tab of the various security profile workspaces.

**Table 9-3. Profile Value Tab**

Fields or Sections	Description	Required	Type and Range
The fields in the Profile Values 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 Profile Values 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 9-7](#) is an example of the **Locations** tab found in the Master profile workspace. On this tab specific locations are linked to the profile.



**Figure 9-7. 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. <a href="#">Locations on page 10-38.</a>
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.  <b>NOTE:</b> 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 will have 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 back 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 and it is the most easily explained to staff. 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.

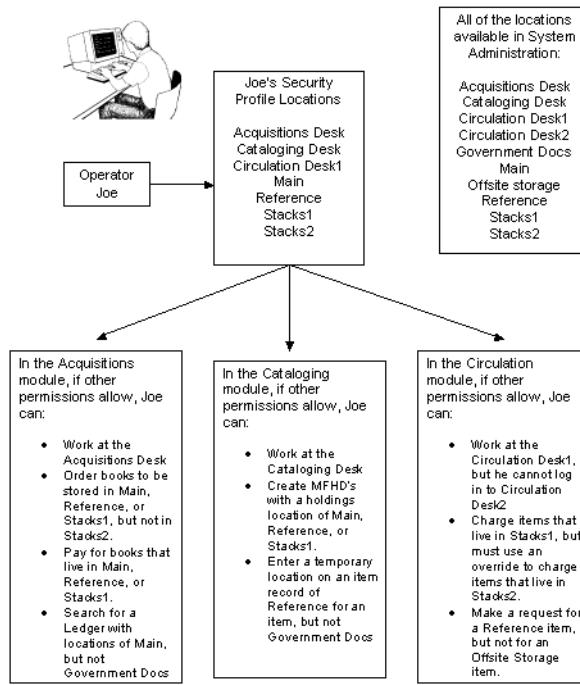
The storage locations in an operator's security profile allow the operator to work with an item that is, or will be, stored at that location.

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 9-8](#) displays an example of how locations can limit access.



**Figure 9-8. Example of How Locations Limit Access**

### Happening Locations in the Operator Profile

In order for an operator 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 therefore do not have a happening location for that module. This means they will not be able to log in to that module. For example, if I have no Cataloging security profile, when I attempt to log in to the Cataloging module I won't be allowed access. The message in [Figure 9-9](#) displays.

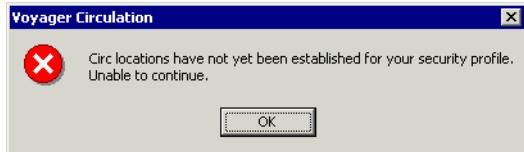


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**Figure 9-9. No Cataloging Security Profile**

If an operator does have a security profile established, but there are no happening locations in that profile for a particular module, they will not be able to log in to that module. For example, if there are no Circulation desks in my profile, when I attempt to log in to the Circulation module I won't be allowed access. The message in [Figure 9-10](#) displays.

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**Figure 9-10. No Happening Locations in the Operator's Circulation Security Profile**

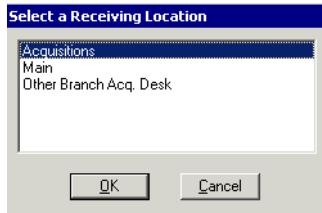
### Logging in to a Module

When an operator's profile contains a single happening location, when they log into the system they log in to that particular location.

When an operator whose operator profile contains multiple happening locations in System Administration logs in to Voyager, the system prompts for a location. The operator must choose the location they want to log into. 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 9-11](#) 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 (this is so because the **Receive Location** check box, on the **Locations** tab of the **Acquisitions - Policy Definitions** workspace in the System Administration module, is checked).



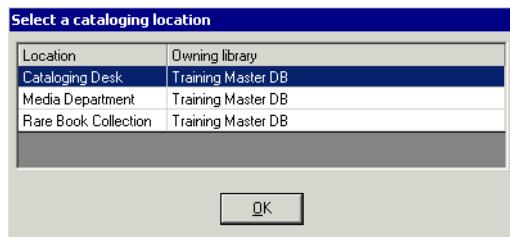
**Figure 9-11. Acquisitions Log On, Select a Receiving Location**

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, before an operator can change an order or invoice for locations that are in separate policy groups, the security profile must include all of the right locations for the profile.

### Cataloging Module

[Figure 9-12](#) 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 (this is so because the **Catalog Location** check box, on the **Locations** tab of the **Cataloging - Policy Definitions** workspace in the System Administration module, is checked).



**Figure 9-12. Catalog Log On, Select a Cataloging Location**

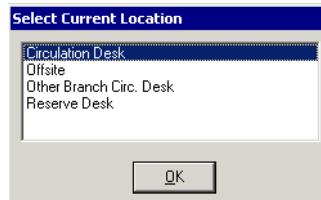
The operator selects a location and the activities that the operator can perform while logged in to that Catalog desk depend on settings in the System Administration module, **Security - Cataloging Profiles** workspace.

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 will need an Operator Profile linked to one Cataloging Security Profile.

### Circulation Module

[Figure 9-13](#) 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 (this is so because the **Circulation Location** check box, on the **Locations** tab of the **Circulation - Policy Definitions** workspace in the System Administration module, is checked).

---



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**Figure 9-13. 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 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 will need an Operator Profile linked to one Circulation Security Profile.

## Operator Profiles - Creating, Editing and Deleting

---

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 lets the system know what functions the operator can and cannot perform in any module.

Creating an Operator Profile requires an operator's name, an operator ID, and a password.

At login, operators must enter their operator IDs and passwords exactly as they are entered in the Operator Profile, including uppercase and lowercase alpha characters, or their login attempt is rejected. For example, if you enter Circ as an operator ID or password, the system rejects circ or CIRC or any other variant entered at login. The system only accepts Circ.

The system does not mask operator IDs and passwords in the System Administration module. As a result, you are able to use the profiles for a reference when operators forget theirs. The system masks passwords at login.

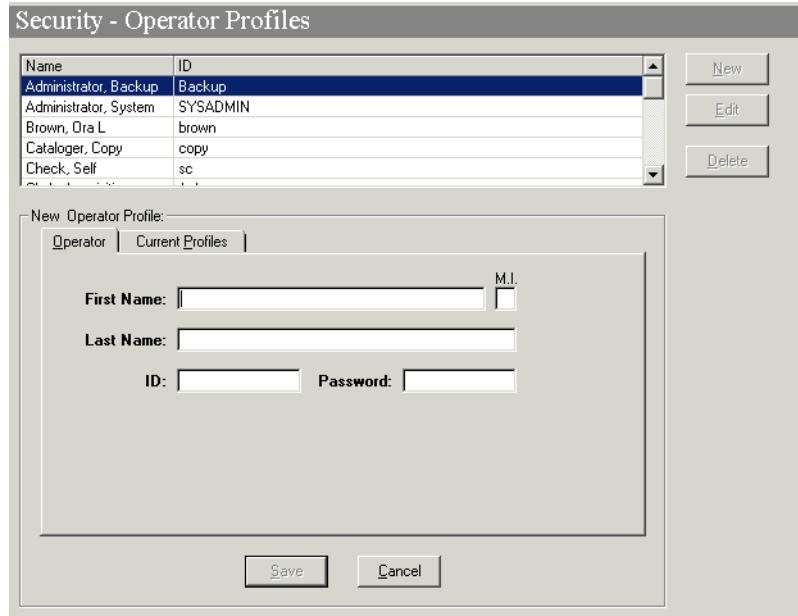
The system includes operator IDs in transaction logs so IDs display on printed reports and online displays. Insofar as it is possible, you may want operator IDs to resemble a staff person's name for easy identification.

## **Operator Profiles Workspace**

---

The **Security - Operator Profiles** workspace contains two tabs, the **Operator** and the **Current Profiles** tab.

[Figure 9-14](#) shows the **Operator** tab. On this tab the name, ID, and password information is provided.



**Figure 9-14. Operator Tab of the Operator Profiles Workspace**

[Table 9-5](#) describes the fields found on the **Operator** tab of the **Security - Operator Profiles** workspace.

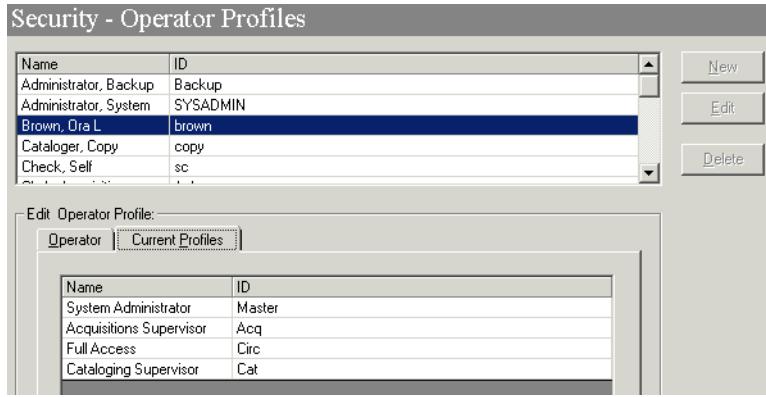
**Table 9-5. Operator Tab**

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. 10 characters.
Password	Operator's password to be used when logging on to the system.	Yes	Alphanumeric, punctuation and spaces. Uppercase and lowercase allowed. 9 characters.

[Figure 9-15](#) shows the **Current Profiles** tab. The profile name and profile ID are listed on this tab after the operator is linked to specific security profiles. In this example, the operator, Ora, is linked to four security profiles: System Administrator, Acquisitions Supervisor, Full Access, and Cataloging Supervisor.



**Figure 9-15. Current Profiles Tab**

### **Creating an Operator Profile**

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To create an Operator profile, the administrator must enter a name, ID, and password.



#### **Procedure 9-2. Creating an Operator Profile**

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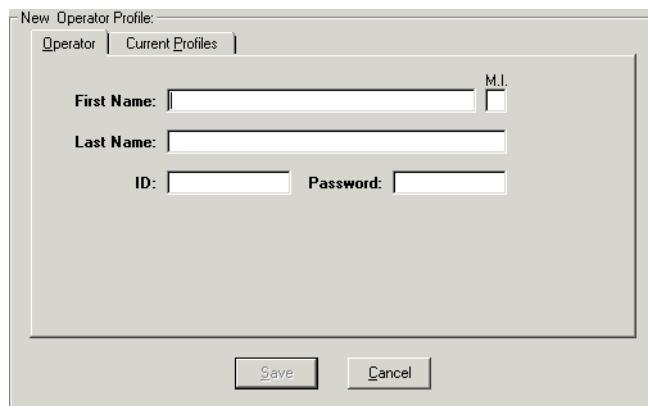
Use the following to create an Operator Profile.

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 to the **Operator** and **Current Profile** tabs (see [Figure 9-16](#)).



**Figure 9-16. Operator Tab**

3. Enter the operator's first name, middle initial (if wanted), last name, ID, and password in the corresponding fields.
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 (see [Figure 9-17](#)).

**Security - Operator Profiles**

Name	ID
Supervisor, Acquisitions	Acq
supervisor, cataloging	cat
supervisor, circulation	circ
Taylor, Debbie	Debbie
Working, Ivana B	ivanaw

Edit Operator Profile:

[Operator] [Current Profiles]

First Name:  M.I.   
Last Name:   
ID:  Password:

Create Date:   
Modify Date:   
Modify Operator:

---

**Figure 9-17. Completed Operator Profile**

---

### **Editing an Operator Profile**

---

You may change or delete any information or the entire operator record at any time. When you edit a profile, notice that 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 **Edit** button to edit a profile.

The bottom half of the workspace opens to the **Operator** and **Current Profile** tabs.

- 3. Edit any of the fields on the **Operator** tab.
- 4. Click the **Save** button to save the changes. Click the **Cancel** button if you do not want to save the changes.

Result: The Operator profile has been edited.

---

## **Deleting an Operator**

---

The **Security - Operator Profiles** workspace is where sites can delete operators from the system.

This can be done at any time.

**NOTE:**

The Operator Profile, System Administrator, is a control profile and cannot be deleted, only its password can, and should be, changed.



### **Procedure 9-4. Deleting an Operator**

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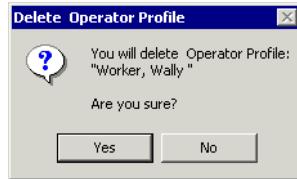
Use the following to delete an operator profile.

- 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. Highlight the operator that you want to delete. Click the **Delete** button.

Result: A message asking for confirmation of the deletion displays (see [Figure 9-18](#)).



---

**Figure 9-18. Confirmation Message Before Deleting an Operator**

3. Click **Yes** to delete the operator.

Result: The operator is deleted and their name and ID are no longer in the list in the **Security - Operator Profiles** workspace.

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## **Master Security Profiles - Creating, Editing, and Deleting**

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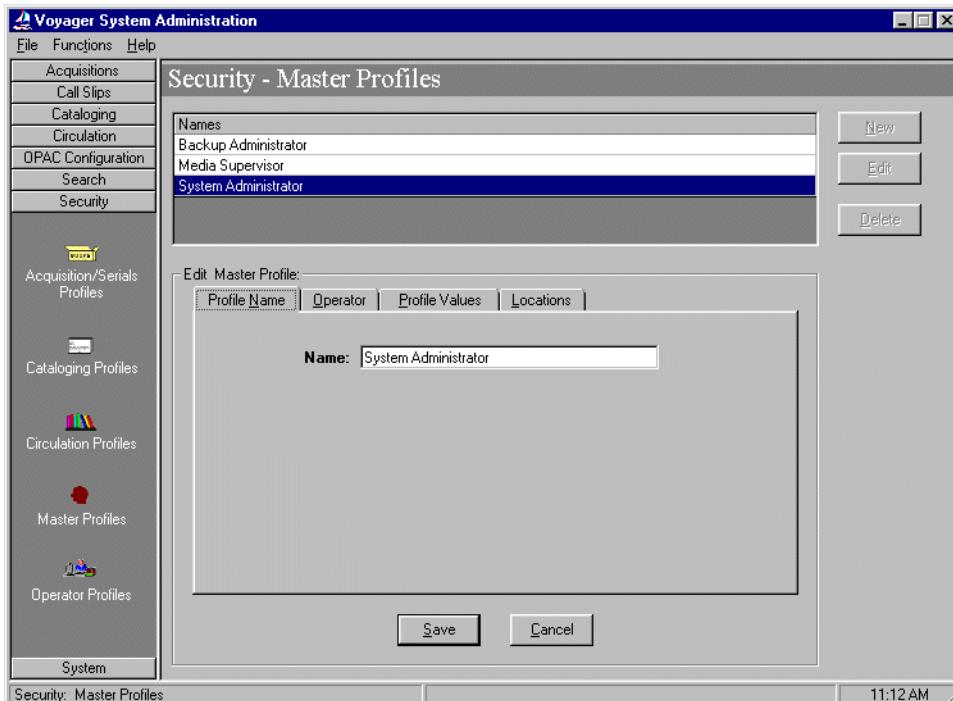
Master Security Profiles control access to the System Administration module itself. An Operator Profile linked to a Master Security Profile has the ability to add, edit, or delete values for the following:

- 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)
- Edit 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 9-19](#)) it contains the tabs, **Profile Name**, **Operator**, **Profile Values**, and **Locations**.



**Figure 9-19. Security - Master Profiles Workspace, Profile Name Tab**

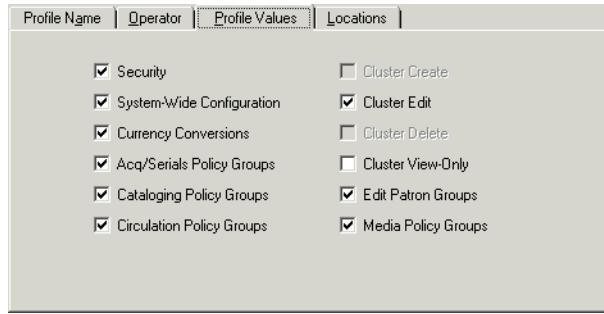
The **Profile Name**, **Operator**, and **Locations** tabs are common elements and discussed in section [Common Elements in all Security Profiles](#) on [page 9-5](#).

### 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 9-20](#) shows the **Profile Values** tab of the **Security - Master Profiles** workspace.



**Figure 9-20. 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	<p>Operator(s) linked to this Master Security Profile can access the Security listbar (see <a href="#">Security Listbar</a> on <a href="#">page 9-4</a>) to:</p> <ul style="list-style-type: none"> <li>• Add, update, and delete Operator Profiles</li> <li>• Create Security Profiles for policy groups</li> <li>• Link or unlink Operator Profiles from the Security Profile for policy groups</li> </ul>	No	<p>Check box The default is checked.</p>

**Table 9-6. Fields in the Profile Values Tab**

Name	Description	Required	Type and Range
System-Wide Configuration	<p>Operator(s) linked to this Master Security Profile can access:</p> <ul style="list-style-type: none"><li>• System listbar (see <a href="#">System listbar on page 10-2</a>) to add, edit, or delete values entered in the System Configuration section of the System Administration module</li><li>• OPAC Configuration listbar (see <a href="#">OPAC Configuration main window on page 7-3</a>) to add/ update the screens in the OPAC section of the System Administration module</li><li>• Call Slips listbar (see <a href="#">Call Slips - No-Fill Reasons main dialog box on page 3-3</a>) to add, edit, or delete values entered in the Call Slips section of the System Administration module</li><li>• Search listbar (see <a href="#">Search Menu on page 8-2</a>) to add, edit, or delete values entered in the Search section of the System Administration module</li></ul> <p>You do not need to associate the profile with any Location.</p>	No	Check box The default is checked.
Currency Conversions	Not enabled at this time.		
Acq/Serials Policy Groups	<p>Operator(s) linked to this Master Security Profile can access the Acquisitions listbar (see <a href="#">Acquisitions listbar on page 2-2</a>) to:</p> <ul style="list-style-type: none"><li>• Add, create, and delete values entered in the Acquisitions/ Serials Policy Group in the Administration module</li></ul> <p>(If your site has more than one Acquisitions/Serials Policy Group, you also need to consider Locations.)</p>	No	Check box The default is checked.

**Table 9-6. Fields in the Profile Values Tab**

Name	Description	Required	Type and Range
Cataloging Policy Groups	<p>Operator(s) linked to this Master Security Profile can access the Cataloging listbar (see <a href="#">Cataloging listbar options</a> on page 4-3) to:</p> <ul style="list-style-type: none"> <li>• Add, create, and delete values entered in the Cataloging Policy Group section of the System Administration module</li> </ul> <p>(If your site has more than one Cataloging Policy Group, you also need to consider Locations.)</p>	No	Check box The default is checked.
Circulation Policy Groups	<p>Operator(s) linked to this Master Security Profile can access the Circulation listbar (see <a href="#">Circulation listbar</a> on page 5-3) to:</p> <ul style="list-style-type: none"> <li>• Add, create, and delete values entered in the Circulation Policy Group section of the System Administration module</li> </ul> <p>(If your site has more than one Circulation Policy Group, you also need to consider Locations.)</p> <p><b>NOTE:</b> The operator must also have cluster authorization.</p>	No	Check box The default is checked.
Cluster Create	<p>Operator(s) linked to this Master Security Profile are allowed to:</p> <ul style="list-style-type: none"> <li>• Create new Circulation Clusters to the database</li> </ul> <p>This ability is dependent upon the Circulation Cluster's associated locations being listed on the Security - Master Profiles&gt; Locations tab and access to Circulation Policy Groups.</p>	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	<p>Operator(s) linked to this Master Security Profile are allowed to:</p> <ul style="list-style-type: none"><li>• Edit Circulation Clusters in the database</li></ul> <p>This ability is dependent upon the Circulation Cluster's associated locations being listed on the Security - Master Profiles&gt; Locations tab and access to Circulation Policy Groups.</p>	No	Check box The default is checked.
Cluster Delete	<p>Operator(s) linked to this Master Security Profile are allowed to:</p> <ul style="list-style-type: none"><li>• Delete Circulation Clusters in the database</li></ul> <p>This ability is dependent upon the Circulation Cluster's associated locations being listed on the Security - Master Profiles&gt; Locations tab and access to Circulation Policy Groups.</p>	No	Check box In single cluster environments, this check box is inactive.
Cluster View-Only	<p>Operator(s) linked to this Master Security Profile are allowed to:</p> <ul style="list-style-type: none"><li>• View Circulation Clusters in the database</li></ul> <p>It enables the View button on the Circulation - Cluster Maintenance workspace, with the fields visible, but not editable.</p> <p>This ability is dependent upon the Circulation Cluster's associated locations being listed on the Security - Master Profiles&gt; Locations tab and access to Circulation Policy Groups.</p>	No	Check box The default is unchecked.
Edit Patron Groups	<p>Operator(s) linked to this Master Security Profile are allowed to:</p> <ul style="list-style-type: none"><li>• Edit Patron Groups</li></ul>	No	Check box The default is checked.

**Table 9-6. Fields in the Profile Values Tab**

Name	Description	Required	Type and Range
Media Policy Groups	<p>Operator(s) linked to this Master Security Profile are allowed to:</p> <ul style="list-style-type: none"> <li>• Create, edit, and delete Media Policy Groups in the Media System Administration module</li> </ul> <p>Does not provide access to the System Administration module, just Media System Administration.</p>	No	Check box The default is checked.

**! 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. For example, if it is to give an operator(s) only the ability to enter currency conversion rates, select only the **Currency Conversions** box.

**NOTE:**

If you selected only System-Wide Configuration and/or Currency Conversions 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

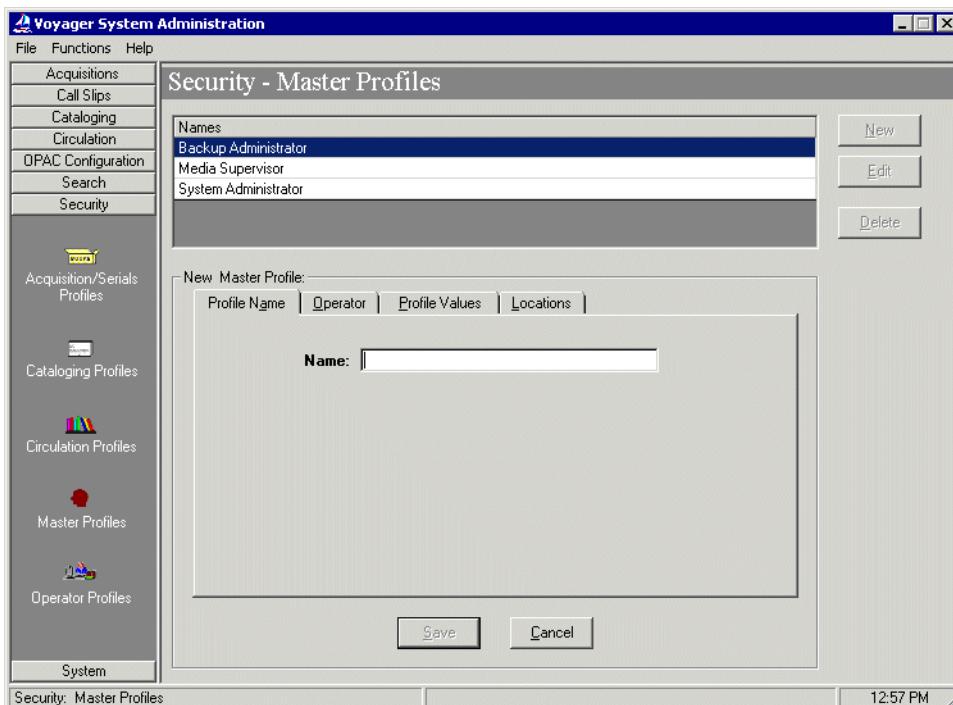
Use the following to create a Master Security Profile.

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 9-21](#)).

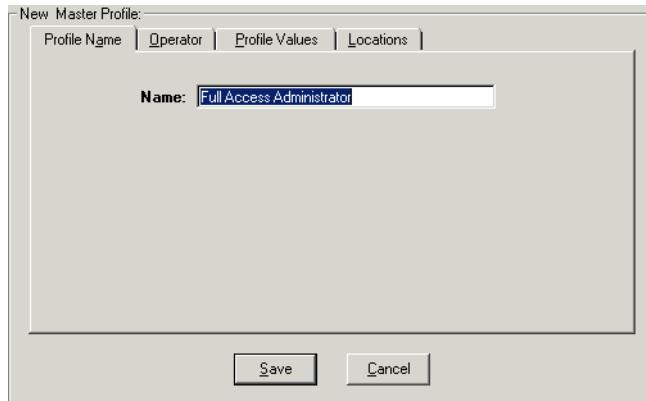


**Figure 9-21. Security - Master Profiles Workspace**

3. Enter a profile name in the **Profile Name** field.

Result: The profile is named (see [Figure 9-22](#)).

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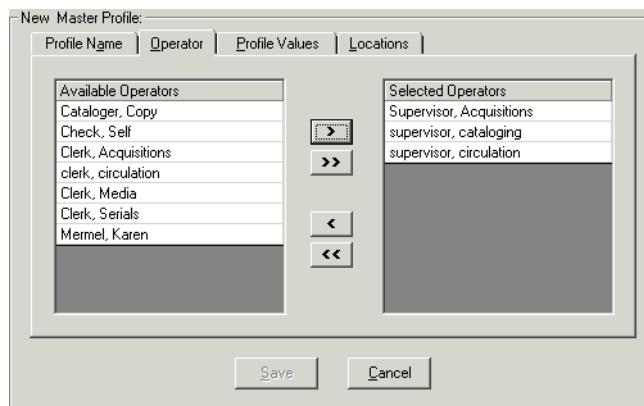
**Figure 9-22. Profile Name Tab**

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.

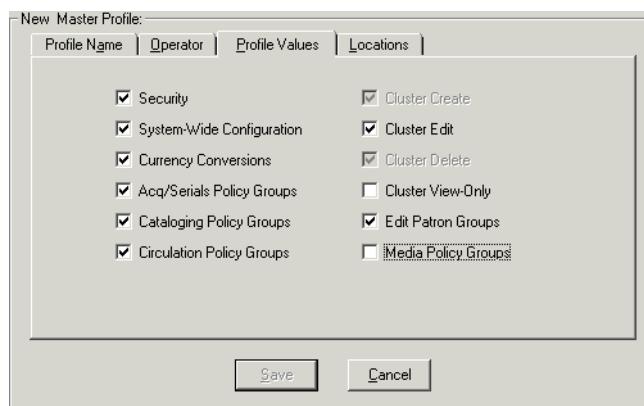
Result: The operators have moved from the **Available Operators** to the **Selected Operators** list and are now associated with the profile (see [Figure 9-23](#)).



**Figure 9-23.** 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 9-24](#)).



**Figure 9-24.** Profile Values Tab with Privileges Granted to Operators in the Profile

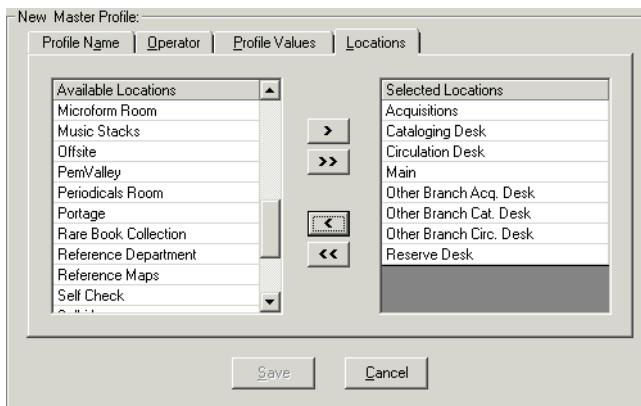
6. Click the **Locations** tab. To associate locations with this profile, perform the following:
  - a. Highlight one or more Locations from the Available Locations list.

- 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 9-25](#)).



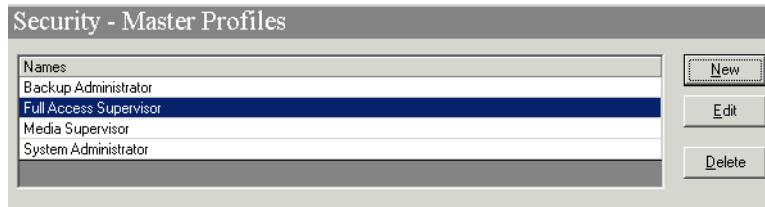
**Figure 9-25. Locations Tab with Locations Associated with this Profile**

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 9-26](#)).



**Figure 9-26.** 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 9-27](#)).



---

**Figure 9-27. 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.

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### **Deleting a Master Security Profile**

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You may delete any profile at any time, except the System Administration operator.



### **Procedure 9-7. Deleting a Master Security Profile**

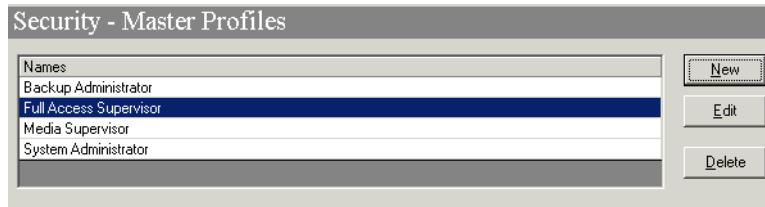
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Use the following to delete a Master Security Profile.

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 9-28](#)).



**Figure 9-28.** Security - Master Profile Workspace with Profile Highlighted

3. Click the **Delete** button.

Result: A message asking for confirmation of the deletion displays (see [Figure 9-29](#)).



**Figure 9-29.** 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.

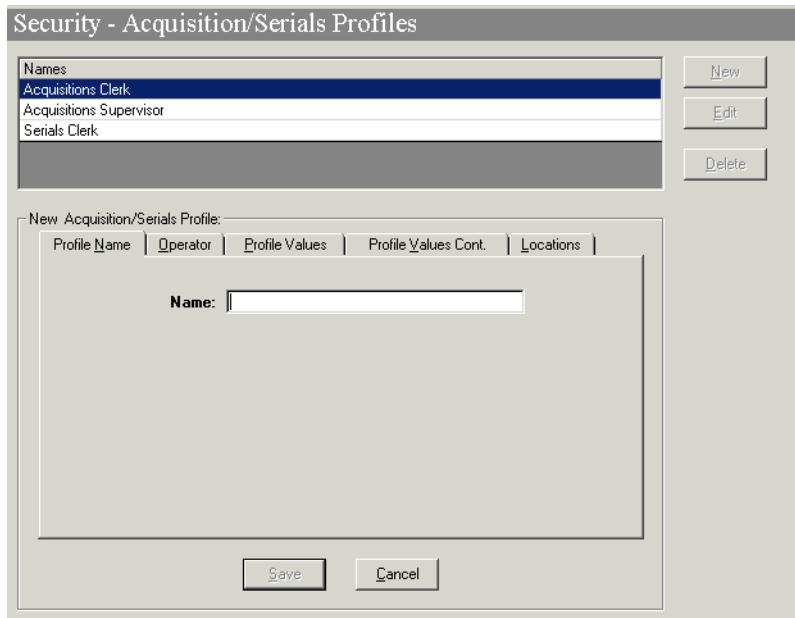
## **Acquisition/Serials Profiles - Creating, Editing, and Deleting**

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 9-30](#). It contains the tabs: **Profile Name**, **Operator**, **Profile Values (two tabs)**, **Locations**.

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**Figure 9-30. 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 9-5](#).

### Profile Values Tabs

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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?

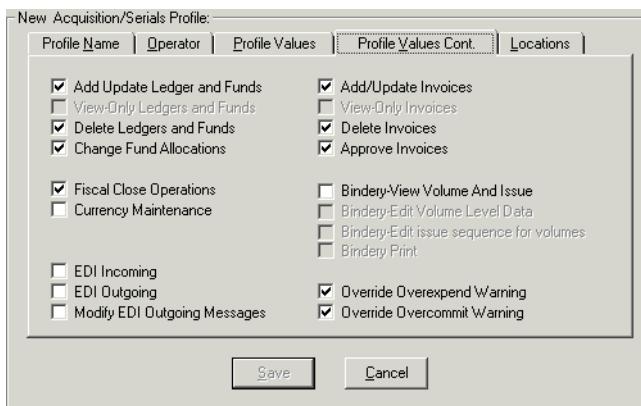
The Profile Value information is split on to two **Profile Values** tabs, the **Profile Values** tab, and the **Profile Values Cont.[inued]** tab. [Figure 9-31](#) and [Figure 9-32](#) show the **Profile Values** tabs.

The screenshot shows the 'Profile Values' tab of a software interface titled 'New Acquisition/Serials Profile'. The tab is active, indicated by a grey border. Below the tab, there are several groups of checkboxes representing different security permissions:

- Purchase Orders:** Add/Update Purchase Orders (checked), Delete Purchase Orders (checked), View-Only Purchase Orders (unchecked), Approve Purchase Orders (checked).
- Items:** Add/Update Item (unchecked), Delete Item (unchecked), View-Only Item (checked).
- Vendors:** Add/Update Vendor (checked), Delete Vendors (checked), View-Only Vendors (unchecked).
- Serials:** Serials Check-In (checked), View-Only Serials CheckIn (unchecked), Add/Update Serial Patterns (checked), View-Only Serial Patterns (unchecked), Delete Serial Patterns (unchecked).
- Claims:** Process Claims from Acquisitions (checked), Process Claims from Serials Control (checked), View-Only Problems and Claims Lists (unchecked).
- Attachments:** Attach Holding to any Bibliographic Record (checked).

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

**Figure 9-31. Profile Values Tab**

**Figure 9-32. Profile Values Continued Tab**

[Table 9-7](#) describes the check boxes found on the **Profile Values** tabs of the **Security - Acquisition/Serials Profiles** workspace.

**Table 9-7. Profile Values tabs**

Option Name	Description	Required	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.	No	Check box  The default is checked.
Receive	When checked, acquisitions operators linked to this profile may only receive items.	No	Check box  The default is inactive, but checked.
Delete Purchase Orders	When checked, acquisitions operators linked to this profile may delete purchase orders.	No	Check box  The default is checked.

**Table 9-7. Profile Values tabs**

Option Name	Description	Required	Type and Range
View-Only Purchase Orders	When checked, acquisitions operators linked to this profile may only view purchase orders.	No	Check box The default is 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.	No	Check box The default is 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.	No	Check box The default is unchecked.
Delete Item	When checked, acquisitions operators linked to this profile may delete items.	No	Check box. The default is inactive.
View-Only Item	When checked, acquisitions operators linked to this profile may only view items.	No	Check box The default is inactive, but checked.

**Table 9-7. Profile Values tabs**

<b>Option Name</b>	<b>Description</b>	<b>Required</b>	<b>Type and Range</b>
Add/Update Vendor	<p>When checked, acquisitions operators linked to this profile may create and edit vendor records.</p> <p>Add/Update automatically includes the ability to search and display the record.</p> <p>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.</p>	No	Check box The default is checked.
Delete Vendors	When checked, acquisitions operators linked to this profile may delete vendor records.	No	Check box The default is checked.
View-Only Vendors	When checked, acquisitions operators linked to this profile may only view vendor records.	No	Check box The default is inactive.
Serials Check-in	<p>When checked, acquisitions operators linked to this profile may check-in serial issues.</p> <p>This also gives operators the ability to edit serials records.</p>	No	Check box The default is checked.

**Table 9-7. Profile Values tabs**

Option Name	Description	Required	Type and Range
View-Only Serials Check-In	<p>When checked, acquisitions operators linked to this profile have view-only privileges for Serials Check-In.</p> <p>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.</p> <p> <b>TIP:</b> <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></p>	No	Check box The default is inactive.

**Table 9-7. Profile Values tabs**

<b>Option Name</b>	<b>Description</b>	<b>Required</b>	<b>Type and Range</b>
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 <b>Marked Line Items</b> tab of the <b>Problems</b> screen, the <b>Claimed Line Items</b> tab of the <b>Claims</b> screen, the <b>Problems</b> tab of a line item, the <b>Claims</b> tab of a line item, an approved purchase order, and an approved invoice.	No	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 <b>Marked Issues</b> tab of the <b>Problems</b> screen, the <b>Claimed Issues</b> tab of the <b>Claims</b> screen, the <b>Problem History</b> tab of the Serials History activity, the <b>Claims History</b> tab of the Serials History activity, an approved purchase order, and an approved invoice.	No	Check box The default is checked.

**Table 9-7. Profile Values tabs**

Option Name	Description	Required	Type and Range
View-Only Problems and Claims Lists	<p>When checked, acquisitions operators linked to this profile may only view the Problems and Claims lists.</p> <p>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.</p> <p> <b>TIP:</b> <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></p>	No	Check box The default is inactive.
Add/Update Serial Patterns	When checked, acquisitions operators linked to this profile may create and edit serial patterns.	No	Check box The default is checked.
View-Only Serial Patterns	When checked, acquisitions operators linked to this profile may only view serial patterns.	No	Check box The default is inactive.
Delete Serial Patterns	When checked, acquisitions operators linked to this profile may delete serial patterns.	No	Check box The default is unchecked.

**Table 9-7. Profile Values tabs**

<b>Option Name</b>	<b>Description</b>	<b>Required</b>	<b>Type and Range</b>
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	No	Check box  The default is checked.
Add/Update Ledgers and Funds	When checked, acquisitions operators linked to this profile may add and update ledgers and funds.	No	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.	No	Check box  The default is inactive.
Delete Ledgers and Funds	When checked, acquisitions operators linked to this profile may delete ledgers and funds.	No	Check box  The default is checked.
Change Fund Allocations	When checked, acquisitions operators linked to this profile may change fund allocations.	No	Check box  The default is checked.

**Table 9-7. Profile Values tabs**

Option Name	Description	Required	Type and Range
Add/Update Invoices	When checked, acquisitions operators linked to this profile may add and update invoices.	No	Check box The default is checked.
View-Only Invoices	When checked, acquisitions operators linked to this profile may only view invoice information.	No	Check box The default is inactive.
Delete Invoices	When checked, acquisitions operators linked to this profile may delete invoices.	No	Check box The default is checked.
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.	No	Check box The default is checked.
Fiscal Close Operations	When checked, acquisitions operators linked to this profile may create rules for closing funds at the end of the fiscal period.	No	Check box The default is checked.
Currency Maintenance	When checked, acquisitions operators linked to this profile may change the conversion rates for foreign currencies.	No	Check box The default is unchecked.
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.	No	Check box The default is unchecked.

**Table 9-7. Profile Values tabs**

<b>Option Name</b>	<b>Description</b>	<b>Required</b>	<b>Type and Range</b>
Bindery-Edit Volume Level Data	<p>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.</p> <p>In addition, the operator can create item records and collapse issues for a volume.</p> <p>Not available unless the Bindery - View Volume and Issue check box is checked.</p>	No	Check box The default is inactive.
Bindery-Edit Issue sequence for volumes	<p>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.</p> <p>Not available unless the Bindery - View Volume and Issue check box is checked.</p>	No	Check box The default is inactive.
Bindery Print	<p>When checked, acquisitions operators linked to this profile may print bindery notes and pull slips from the Bindery Maintenance workspace.</p> <p>Not available unless the Bindery - View Volume and Issue check box is checked.</p>	No	Check box The default is inactive.

**Table 9-7. Profile Values tabs**

Option Name	Description	Required	Type and Range
EDI Incoming	<p>When checked, acquisitions operators linked to this profile may search and load incoming EDI messages and EDI connection profiles.</p> <p>If the EDI Incoming check box is not checked, the Incoming tab of the EDI activity will not be available.</p>	No	Check box The default is unchecked.
EDI Outgoing	<p>When checked, acquisitions operators linked to this profile may create and send outgoing EDI messages and EDI connection profiles.</p> <p>The ability to send outgoing EDI messages is also allowed.</p> <p>If the EDI Outgoing check box is not checked, the Outgoing tab of the EDI activity will not be available.</p>	No	Check box The default is unchecked.
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.	No	Check box The default is unchecked.

**Table 9-7. Profile Values tabs**

Option Name	Description	Required	Type and Range
Override Overexpend Warning	<p>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.</p> <p>(Default overcommit and overexpend values are defined for each Fund Type. See <a href="#">Fund Types</a> on <a href="#">page 2-19</a>).</p>	No	Check box The default is checked.
Override Overcommit Warning	<p>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.</p> <p>(Default overcommit and overexpend values are defined for each Fund Type. See <a href="#">Fund Types</a> on <a href="#">page 2-19</a>).</p>	No	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 9-16](#).
- Locations must be defined. See [Locations](#) on [page 10-38](#).

**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 9-33](#)).



**Figure 9-33. 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:**

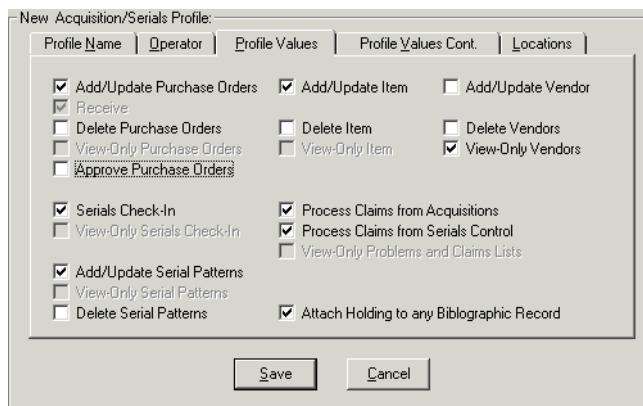
To move all operators from the **Available Operators** list to the **Selected Operators** list, do not highlight them, simply click the **>>** button.

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 9-34](#)).

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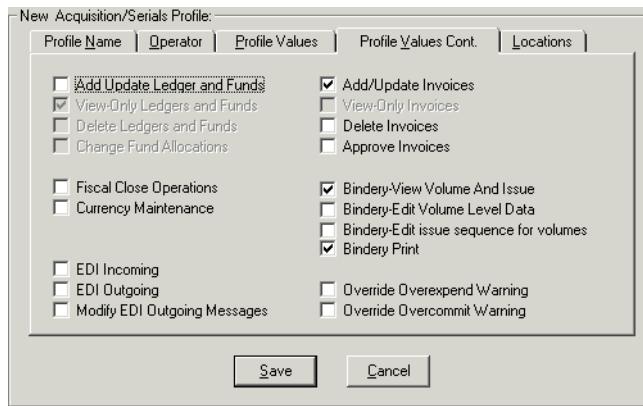


**Figure 9-34. Completed Profile Values Tab**

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 9-35](#)).

---



**Figure 9-35. 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:**

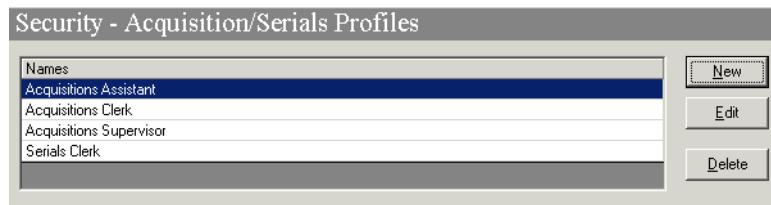
To move all locations from the **Available Locations** list to the **Selected Locations** list, do not highlight them, simply click the **>>** button.

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 9-36](#)).

---



**Figure 9-36. New Acquisition/Serials Profile in List of Profiles**

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### 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**

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You may delete an Acquisition/Serials Profile at any time.



#### **Procedure 9-10. Deleting an Acquisition/Serials Profile**

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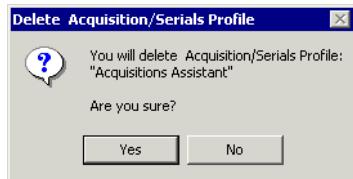
Use the following to delete a Acquisition/Serials Profile.

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 9-37](#)).



**Figure 9-37. Confirmation Message before Deleting the Profile**

3. Click the **Yes** button if you do want to delete this profile.

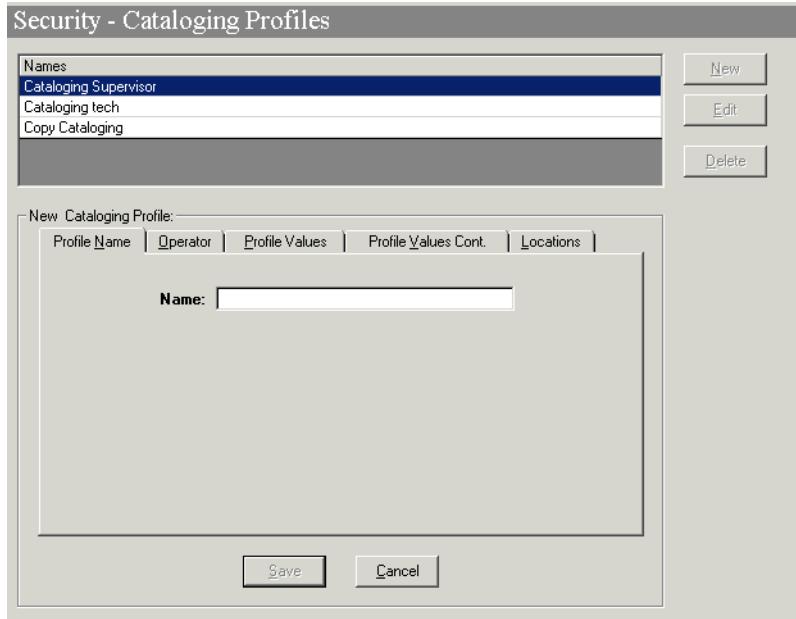
Result: The Acquisition/Serials profile is deleted, and no longer displays in **Security - Acquisition/Serials Profiles** workspace.

## 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 9-38](#)). It contains the tabs, **Profile Name**, **Operator**, **Profile Values** (two tabs) and **Locations**.



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**Figure 9-38.** 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 9-5](#).

### Profile Values Tabs

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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.

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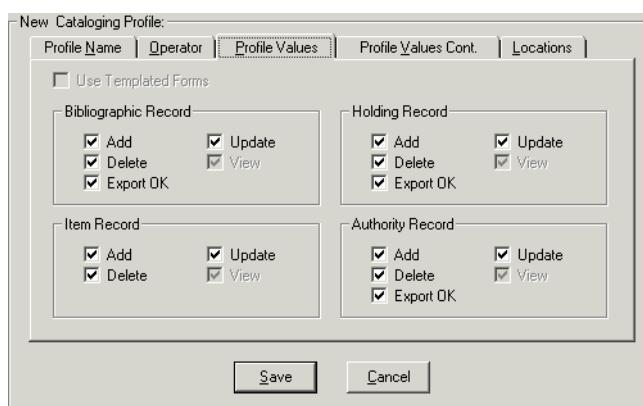
Be aware that functions for holdings records can be restricted by Location(s) so that, for example, an operator can only **Add Holdings Records** for items destined for specific Locations selected.

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.

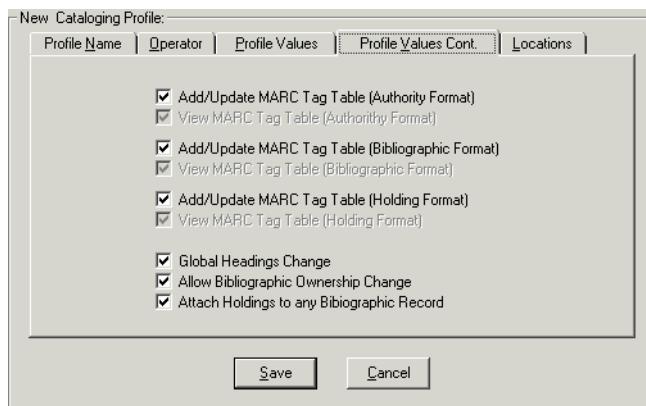
The Profile Value information is split on to two **Profile Values** tabs: the **Profile Values** tab, and the **Profile Values Cont.[inued]** tab. [Figure 9-39](#) and [Figure 9-40](#) show the **Profile Value** tabs.

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**Figure 9-39. Profile Values Tab**



**Figure 9-40. Profile Values Cont.[inued] Tab**

[Table 9-8](#) describes the fields found on the **Profiles** tab of the **Security - Cataloging Profiles** workspace.

**Table 9-8. 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.
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.

---

**Table 9-8. Profile Values tabs**

Option Name	Description	Required	Type and Range
Bibliographic Record section: OK to Export	<p>When checked, this enables the OK to export check box on the System tab of a record in the Cataloging module.</p> <p>Through this check box, records can be marked for export.</p> <p>If it is not checked on the Profile Values tab, the OK to export check box is unavailable in the Cataloging module.</p>	No	<p>Check box</p> <p>The default is checked. Click to clear.</p>
Bibliographic Record section: Update	<p>When checked, cataloging operators linked to this profile may edit and save bibliographic records.</p> <p>Update automatically includes the ability to search and display the record.</p>	No	<p>Check box</p> <p>The default is checked. Click to clear.</p>

**Table 9-8. Profile Values tabs**

Option Name	Description	Required	Type and Range
Bibliographic Record section: View	<p>When checked, cataloging operators linked to this profile may only search the database and display bibliographic records.</p> <p>Any operator with View authorization only cannot add, update, or delete the record type to or from the database.</p> <p><b>NOTE:</b> 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.</p>	No	<p>Check box The default is unchecked.</p>

**Table 9-8. Profile Values tabs**

Option Name	Description	Required	Type and Range
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.
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.	No	Check box  The default is checked. Click to clear.

**Table 9-8. Profile Values tabs**

<b>Option Name</b>	<b>Description</b>	<b>Required</b>	<b>Type and Range</b>
Holding Record section: View	<p>When checked, cataloging operators linked to this profile may only search the database and display holding records.</p> <p>Any operator with View authorization only cannot add, update, or delete the record type to or from the database.</p>	No	Check box The default is unchecked.
Item Record section: Add	<p>When checked, cataloging operators linked to this profile may create item records.</p> <p>Add automatically includes the ability to search and display the record.</p> <p>An operator must be able to add Holdings records in order to be allowed to add Item records.</p>	No	Check box The default is unchecked.
Item Record section: Delete	<p>When checked, cataloging operators linked to this profile may delete item records.</p> <p>An operator must be able to delete Holdings records in order to be allowed to delete Item records.</p> <p>Delete automatically includes the ability to search and display the record.</p>	No	Check box The default is unchecked.

**Table 9-8. Profile Values tabs**

Option Name	Description	Required	Type and Range
Item Record section: Update	<p>When checked, cataloging operators linked to this profile may edit item records.</p> <p>Update automatically includes the ability to search and display the record.</p> <p>An operator must be able to update Holdings records in order to be allowed to update Item records.</p>	No	Check box The default is unchecked.
Item Record section: View	<p>When checked, cataloging operators linked to this profile may only search the database and display item records.</p> <p>Any operator with View authorization only cannot add, update, or delete the record type(s) to or from the database.</p>	No	Check box The default is checked.
Authority Record section: Add	<p>When checked, cataloging operators linked to this profile may create and save authority records.</p> <p>Add automatically includes the ability to search and display the record.</p>	No	Check box The default is checked. Click to clear.
Authority Record section: Delete	<p>When checked, cataloging operators linked to this profile may delete authority records.</p> <p>Delete automatically includes the ability to search and display the record.</p>	No	Check box The default is checked. Click to clear.

**Table 9-8. Profile Values tabs**

<b>Option Name</b>	<b>Description</b>	<b>Required</b>	<b>Type and Range</b>
Authority Record section: OK to Export	<p>When checked, this enables the OK to export check box on the System tab of a record in the Cataloging module.</p> <p>Through this check box, records can be marked for export.</p> <p>If it is not checked on the Profile Values tab, the OK to export check box is unavailable in the Cataloging module.</p>	No	Check box The default is checked. Click to clear.
Authority Record section: Update	<p>When checked, cataloging operators linked to this profile may edit and save authority records.</p> <p>Update automatically includes the ability to search and display the record.</p>	No	Check box The default is checked. Click to clear.
Authority Record section: View	<p>When checked, cataloging operators linked to this profile may only search the database and display authority records.</p> <p>Any operator with View authorization only cannot add, update, or delete the record type(s) to or from the database.</p>	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.

**Table 9-8. Profile Values tabs**

Option Name	Description	Required	Type and Range
Add/Update MARC Tag Table (Bibliographic Format)	This feature is not enabled.	No	Check box The default is checked.
View MARC Tag Table (Biblio-graphic 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.
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.	No	Check box The default is checked.

**Table 9-8. Profile Values tabs**

<b>Option Name</b>	<b>Description</b>	<b>Required</b>	<b>Type and Range</b>
Attach Holdings to any Bibliographic Record	<p>When checked, the operator is restricted by the operator profile but not restricted by location.</p> <p>If the Cataloging profile indicates that the operator may not Attach Holdings in Any Bibliographic Record, the security is more restrictive.</p> <p>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.</p>	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

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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**

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Before you can create a new Cataloging profile, the following must be completed:

- Operators must be defined. See [Operator Profiles Workspace](#) on [page 9-16](#).
- Locations must be defined. See [Locations](#) on [page 10-38](#).



### **Procedure 9-11. Creating an Cataloging Profile**

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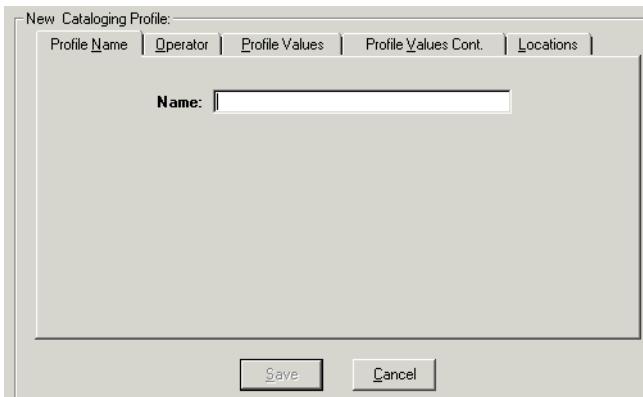
Perform the following steps to create a Cataloging Profile:

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 9-41](#)).



---

Figure 9-41. 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 Cataloguing Profile** to **Edit Cataloguing 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 9-42](#)).

**Figure 9-42.** 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 9-43](#)).

**Figure 9-43.** 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:**

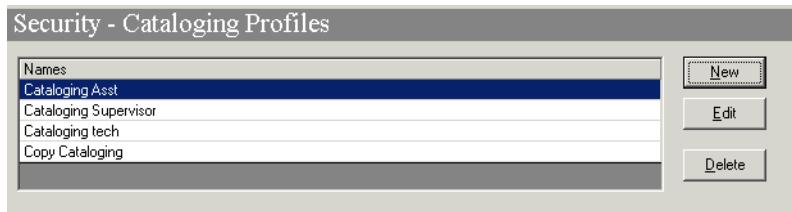
To move all locations from the **Available Locations** list to the **Selected Locations** list, do not highlight them, simply click the >> button.

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 9-44](#)).

---



**Figure 9-44. New Cataloging Profile in List of Profiles**

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### **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 9-45](#)).

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**Figure 9-45. 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.

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## Circulation Profiles - Creating, Editing, and Deleting

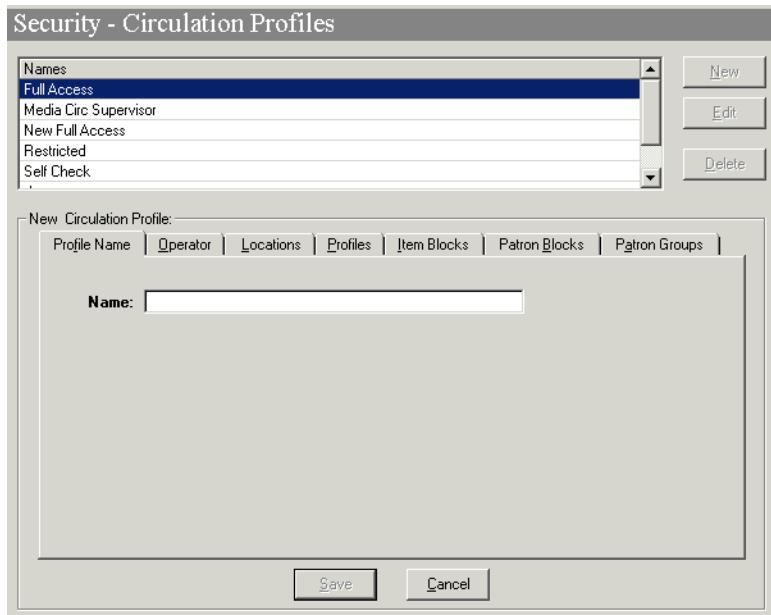
---

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 9-46](#). It contains the tabs: **Profile Name**, **Operator**, **Locations**, **Profiles**, **Item Blocks**, **Patron Blocks**, and **Patron Groups**.

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**Figure 9-46. Security - Circulation Profiles Workspace**

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The **Profile Name**, **Operator**, and **Locations** tabs are common elements and discussed in section [Common Elements in all Security Profiles on page 9-5.](#)

## Profiles Tab (Profile Values)

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This section discusses the additional Circulation specific tabs.

The **Profile** tab is where specific privileges are granted such that operators linked to the profile can perform the activities.

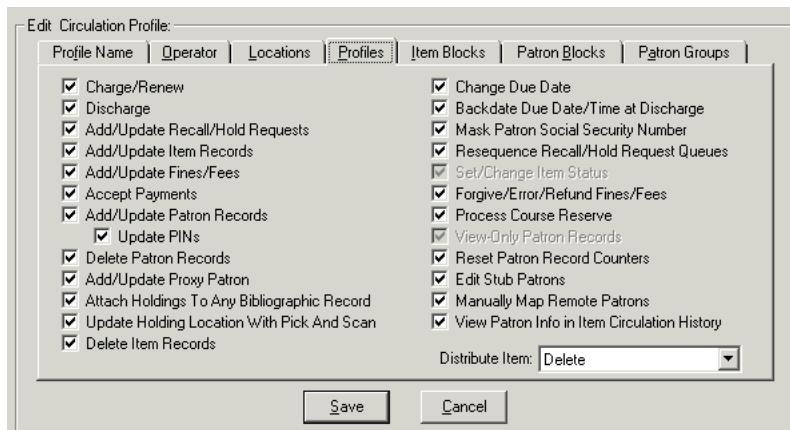
You must select at least one Profile Value for each Circulation Security Profile.

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 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 a logical combination.

[Figure 9-47](#) shows the options on the **Profiles** tab.

---



---

**Figure 9-47. Profiles Tab**

[Table 9-9](#) describes the fields found on the **Profiles** tab of the **Security - Circulation Profiles** workspace.

**Table 9-9. Profiles Tab**

Option Name	Description	Required	Type and Range
Charge/Renew	When checked, circulation operators linked to this profile may charge and renew items.	No	Check box The default is checked. Click to clear.
Discharge	When checked, circulation operators linked to this profile may discharge items.	No	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.	No	Check box The default is checked. Click to clear.
Add/Update Item Records	When checked, circulation operators linked to this profile may create and edit item records.  Also, able to create bibliographic and MFHD records.  Add/Update automatically includes the ability to search and display the record.	No	Check box The default is checked. Click to clear.
Add/Update Fines/ Fees	When checked, circulation operators linked to this profile may create and edit both fines, fees, and demerits.	No	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.	No	Check box The default is checked. Click to clear.

**Table 9-9. Profiles Tab**

Option Name	Description	Required	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.	No	Check box  The default is checked. Click to clear.
Update PINs	When checked, circulation operators linked to this profile may edit PINs.  Must have Add/Update Patron Records check box checked to activate this check box.	No	Check box  The default is checked. Click to clear.
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.	No	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.	No	Check box  The default is not checked.
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.	No	Check box  The default is not checked.

**Table 9-9. Profiles Tab**

<b>Option Name</b>	<b>Description</b>	<b>Required</b>	<b>Type and Range</b>
Update Holding Location with Pick and Scan	When checked, circulation operators linked to this profile may update holding location using Pick and Scan	No	Check box The default is not 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.	No	Check box The default is checked. Click to clear.
Change Due Date	When checked, circulation operators linked to this profile may modify due dates.	No	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.	No	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 <a href="#">Masking SSN</a> on page 9-77.	No	Check box The default is unchecked.
Resequence Recall/Hold Request Queues	When checked, circulation operators linked to this profile may alter the ranking of the Recall/Hold request queues.	No	Check box The default is checked. Click to clear.

**Table 9-9. Profiles Tab**

Option Name	Description	Required	Type and Range
Set/Changes Item Status	When checked, circulation operators linked to this profile may set or change an Item Status	No	Check box The default is inactive.
Forgive/Error/Refund Fines/Fees	When checked, circulation operators linked to this profile may forgive, error out, or refund fines, fees, or demerits.	No	Check box The default is checked. Click to clear.
Process Course Reserve	When checked, circulation operators linked to this profile may search, display, create, and edit Course Reserve Lists in the Circulation module.	No	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.	No	Check box The default is inactive.
Reset Patron Counters	When checked, circulation operators linked to this profile may reset the patron counters on the patron record.	No	Check box The default is checked. Click to clear.
Edit Stub Patrons	When checked, circulation operators linked to this profile may edit stub patron records.  <b>NOTE:</b> Only active if your site uses Universal Borrowing or has more than one Circulation Cluster in the database.	No	Check box The default is not checked.

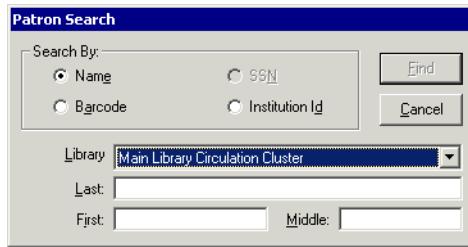
**Table 9-9. Profiles Tab**

<b>Option Name</b>	<b>Description</b>	<b>Required</b>	<b>Type and Range</b>
Manually Map Remote Patrons	<p>When checked, circulation operators linked to this profile may manually map remote patrons.</p> <p><b>NOTE:</b> Only active if your site uses Universal Borrowing or has more than one Circulation Cluster in the database.</p>	No	Check box The default is not checked.
View Patron Info in Item Circulation History	<p>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.</p> <p><b>NOTE:</b> The number of asterisks does not reflect the number of characters in the name or barcode.</p>	No	Check box The default is not checked.
Distribute Item field	<p>This field determines the privileges granted to operators linked to this profile for distributable items.</p> <p>See <a href="#">Table 9-10</a> on <a href="#">page 9-81</a> for more information.</p>	No	A set of system defined privileges, in ascending order of privilege, populates the drop-down list. Delete is the default.

**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 9-48](#)).



**Figure 9-48. 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 9-49](#)).

The screenshot shows the same "Patron Search" dialog box as Figure 9-48, but now displaying search results. The "Last:" field contains "p?". The results table has columns for "Patron Name", "SSN", and "Institution Id". The "SSN" column for all entries is masked as "xxxx - xx - xxxx".

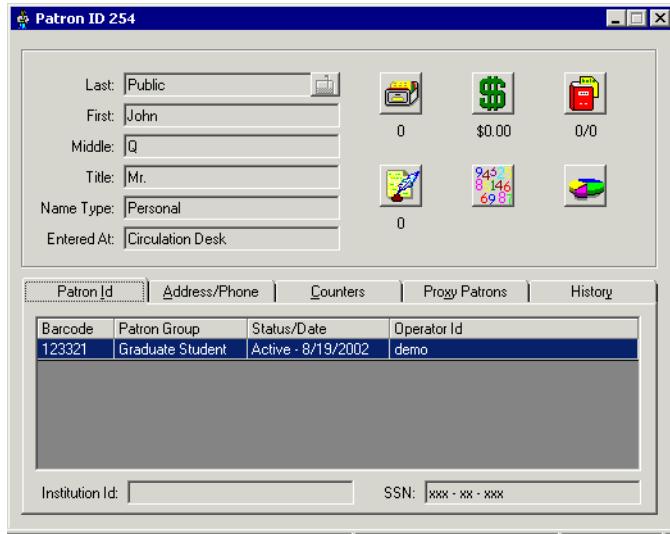
Patron Name	SSN	Institution Id
Palsir, Amy	xxxx - xx - xxxx	100084
Pawlakowski, Jenny	xxxx - xx - xxxx	100085
Pellish, Carol	xxxx - xx - xxxx	100086
Pemble, Melvin	xxxx - xx - xxxx	100087
Piver, Sandra	xxxx - xx - xxxx	100088
Poplawski, Stan	xxxx - xx - xxxx	100089
Public, John Q	xxxx - xx - xxxx	

At the bottom are "OK" and "Cancel" buttons.

**Figure 9-49. 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 will not display on the **Patron Id** tab (see [Figure 9-50](#)).



**Figure 9-50. 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 9-51](#)).

---

The screenshot shows the "Add New Patron Record" dialog box. It has tabs at the top: Name, Barcode, Address, and Phone. The "Name" tab is active. It contains fields for Last, First, Middle, and Title names, and a dropdown for Name Type set to "Personal". There is also a field for Institution Id and two date pickers for Expires and Purge Date.

**Figure 9-51. 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 9-52](#)).

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**Add New Patron Record**

Name	Barcode	Address	Phone		
Last:	<input type="text"/>				
First:	<input type="text"/>				
Middle:	<input type="text"/>				
Title:	<input type="text"/>				
Name Type:	Personal				
Institution Id:	<input type="text"/>				
SSN:	<input type="text"/> xxx - xx - xxxx				
Expires:	<input type="text"/> 8/19/2003	...	Purge Date:	<input type="text"/> 8/19/2003	...

---

**Figure 9-52. Social Security Number Available to Add to New Patron Record**

Also, the SSN does not display when editing a patron record (see [Figure 9-53](#)).

---

**Edit Patron Record**

Name	Barcode	Address	Phone		
Last:	Public				
First:	John				
Middle:	Q				
Title:	Mr.				
Name Type:	Personal				
Institution Id:	<input type="text"/>				
SSN:	<input type="text"/> xxx - xx - xxxx				
Expires:	<input type="text"/> 8/19/2003	...	Purge Date:	<input type="text"/> 8/19/2003	...

---

**Figure 9-53. Edit Patron Record with SSN Masked**

## 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 9-10. 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 **Profiles** tab.

Operators with **Update Holding Location with Pick and Scan** authorization may use Pick and Scan to edit the

- Holding, 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

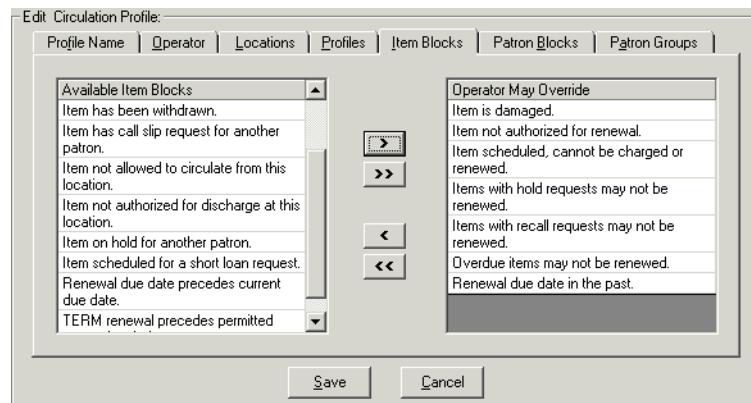
Operators with **Delete Item Records** authorization may use Pick and Scan to

- Delete Item

## 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 9-54](#) displays the **Item Blocks** tab in the **Security - Circulation Profiles** workspace.



**Figure 9-54. Item Blocks Tab**

[Table 9-11](#) describes the List boxes found on the **Item Blocks** tab of the **Security - Circulation Profile** workspace.

**Table 9-11. Item Blocks Tab**

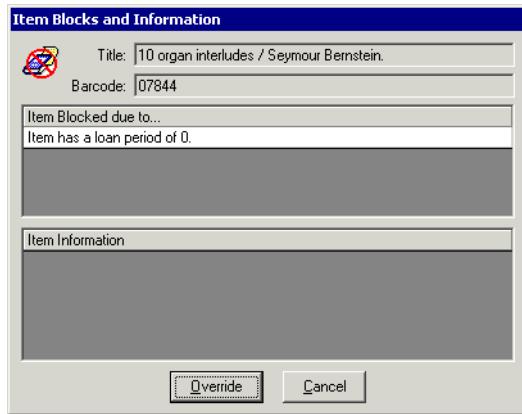
List Box Name	Description	Required	Type and Range
Available Item Blocks list box	List of all available Item Blocks.	Yes	This list is populated by all available Item blocks defined by the System.
Operator May Override list box	List of those Item blocks that operator who are linked to the profile can override.	No	Moved from the Available Item Blocks list box.

[Table 9-12](#) describes the Item blocks that operators linked to this profile may be allowed to override.

**Table 9-12. List of Item Blocks**

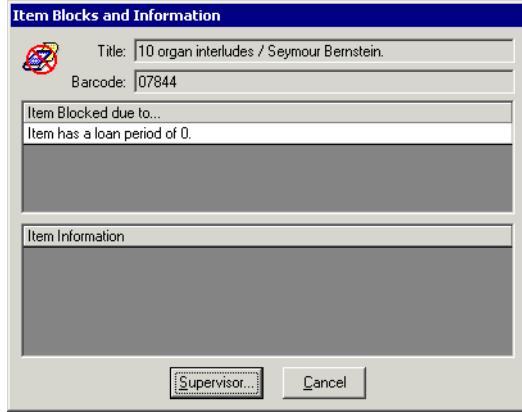
Item Block
End-of-Term Date Not found for TERM loan.
Item does not Circulate.
Item has a loan period of 0.
Item has been withdrawn.
Item has call slip request for another patron.
Item is damaged.
Item is not allowed to circulate from this location.
Item is not authorized for discharge at this location.
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.
Renewal due date precedes current due date.
TERM renewal precedes permitted renewal period.

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 9-55](#)) to continue the transaction.



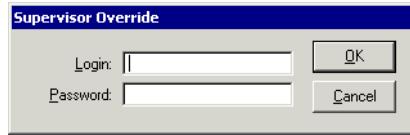
**Figure 9-55.** Item Block Dialog Box with Override Button

If an operator is unable to override a block, a **Supervisor** button displays on the dialog box instead of an **Override** button (see [Figure 9-56](#)).



**Figure 9-56.** Item Blocks and Information Dialog Box with Supervisor Button

When you click the **Supervisor** button, the **Supervisor Override** dialog box opens (see [Figure 9-57](#)).



---

**Figure 9-57. 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 9-58](#)).

---



---

**Figure 9-58. 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.

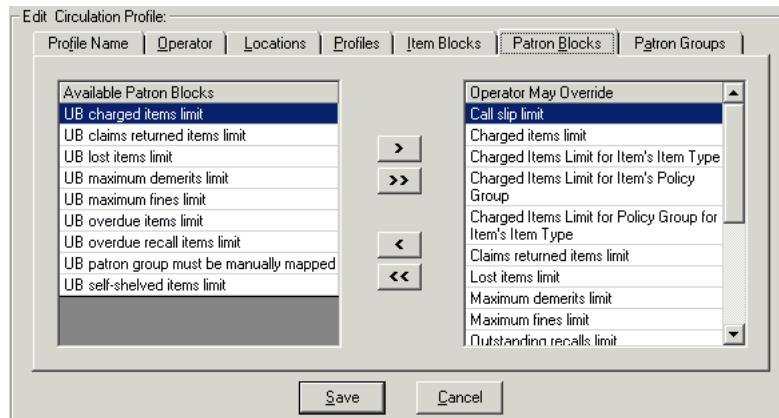
---

### 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 9-59](#) displays the **Patron Blocks** tab in the **Security - Circulation Profiles** workspace.



**Figure 9-59. Patron Blocks Tab**

[Table 9-13](#) describes the List boxes found on the **Patron Blocks** tab of the **Security - Circulation Profile** workspace.

**Table 9-13. 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 9-14](#) describes the Patron blocks that an operator may be allowed to override.

**Table 9-14. 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 9-14. List of Patron Blocks**

<b>Patron Block</b>
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.
<b>NOTE:</b> 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:**

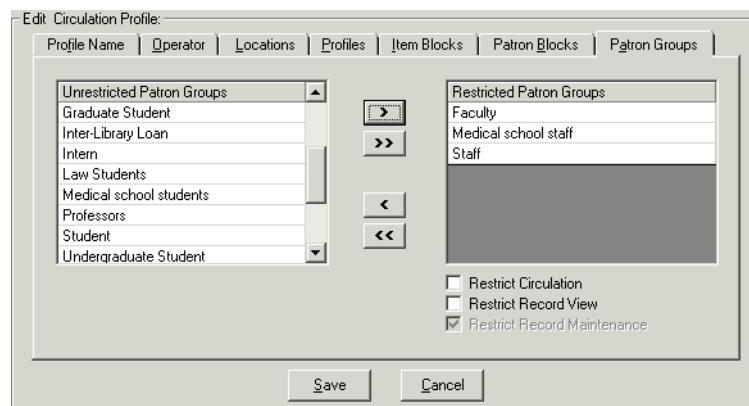
In a situation where there are multiple blocks occurring at a time, if any single block listed is one that the circulation operator is unable to override, then the **Supervisor** button displays on the **Patron Blocks and Information** dialog box.

See the *Voyager Circulation User's Guide*, [Patron Blocks](#), for more information on Patron Blocks.

## Patron Groups Tab

The **Patron Groups** tab (see [Figure 9-60](#)) 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 9-60. Patron Groups Tab**

[Table 9-15](#) describes the list boxes and check boxes found on the **Patron Groups** tab of the **Security - Circulation Profile** workspace.

**Table 9-15. Patron Groups Tab**

Name	Description	Required	Type and Range
Unrestricted Patron Groups list box	List of all available Patron Groups that have no restrictions.  <b>NOTE:</b> 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.  <a href="#">Patron Groups</a> 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 9-15. Patron Groups Tab**

Name	Description	Required	Type and Range
Restrict Record Maintenance	<p>Adding a group to the Restricted Patron Groups list automatically checks this box restricting the operator profile from performing record maintenance.</p> <p>Operators are unable to create or edit the patron records of the selected patron group.</p>	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 9-16](#).
- Locations must be defined. See [Locations on page 10-38](#).



### **Procedure 9-14. Creating a Circulation Profile**

---

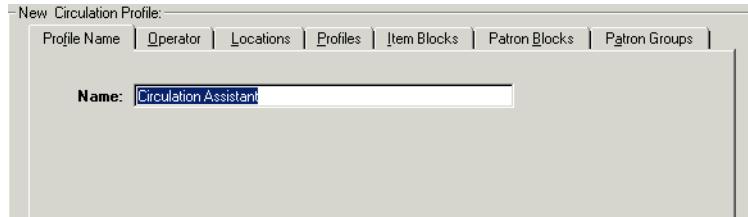
Perform the following steps to create a Circulation Profile:

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 9-61](#)).



---

Figure 9-61. Security - Circulation Profiles Workspace, Profile Name Tab

3. Enter the profile name in the **Profile Name** field.

**NOTE:**

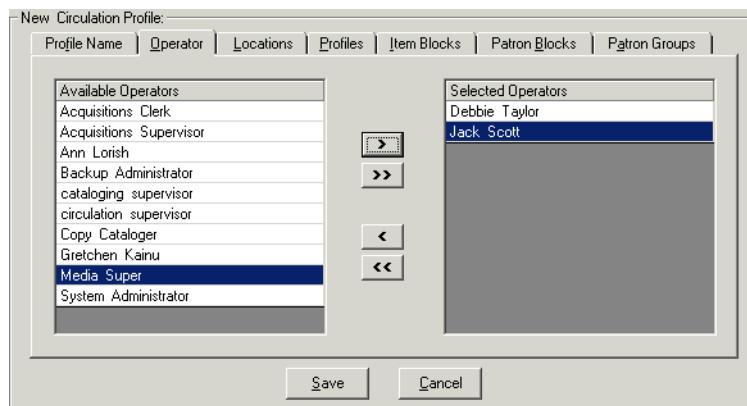
Once a Profile Name is provided, the **Save** button becomes active. At any point, the operator may click the **Save** button to save the profile or click the **Cancel** button if they do not want to save the profile. If saved, the bottom half of the workspace changes from **New Circulation Profile** 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 9-62](#)).



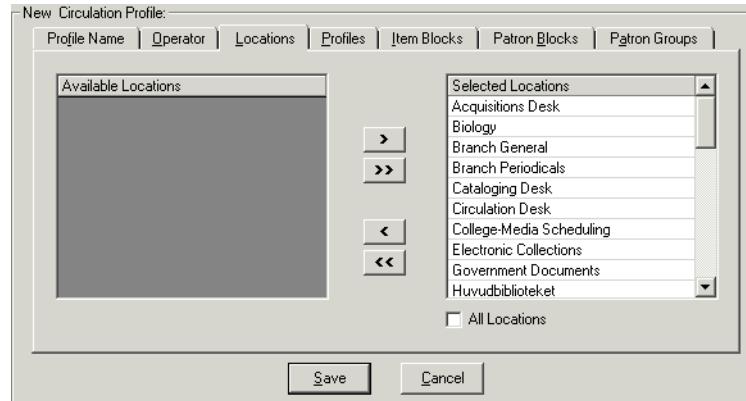
**Figure 9-62. Completed Operator Tab**

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 9-63](#)).



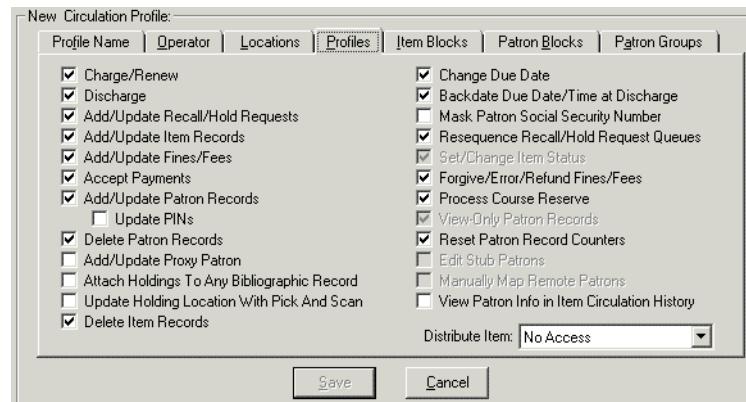
---

**Figure 9-63. 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 9-64](#)).

---



---

**Figure 9-64. Completed Profiles Tab**

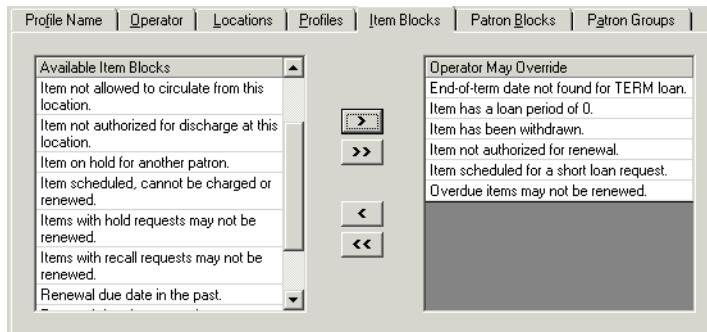
7. Click the **Item Blocks** tab to select the Item blocks you want the operators linked to this profile to be able to override.
  - a. Highlight one or more of the Items Blocks from the **Available Item Blocks** list.

- 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 9-65](#)).



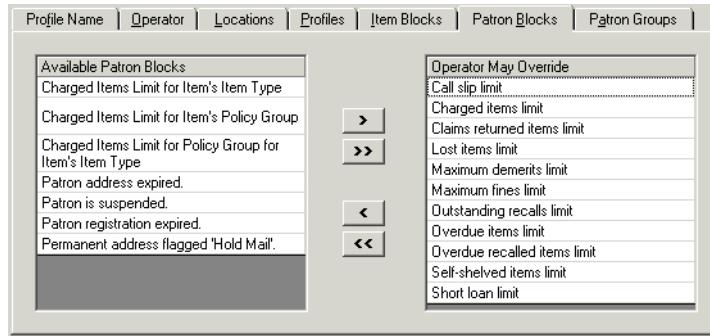
**Figure 9-65. Completed Item Blocks Tab**

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 9-66](#)).



**Figure 9-66. Completed Patron Blocks Tab**

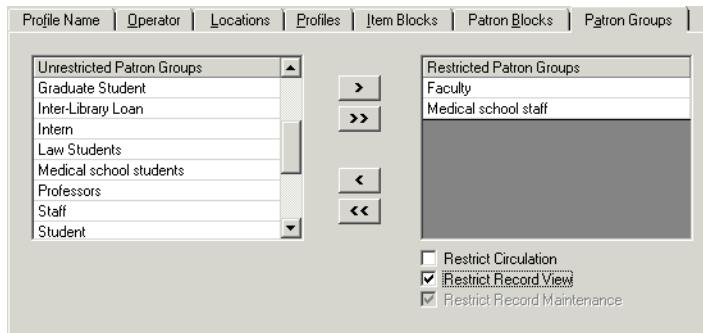
9. Click the **Patron Groups** tab to apply viewing or circulation restrictions on the patron groups that the operators linked to this profile.
  - a. Highlight one or more of the Patron Groups from the **Unrestricted Patron Groups** list.
  - b. Click the **>** button.

**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 9-67](#)).

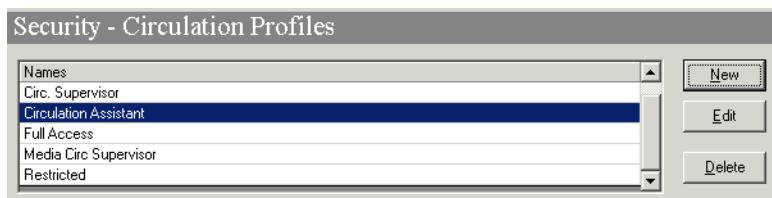


**Figure 9-67.** Completed Patron Groups Tab

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 9-68](#)).

---



**Figure 9-68.** 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.

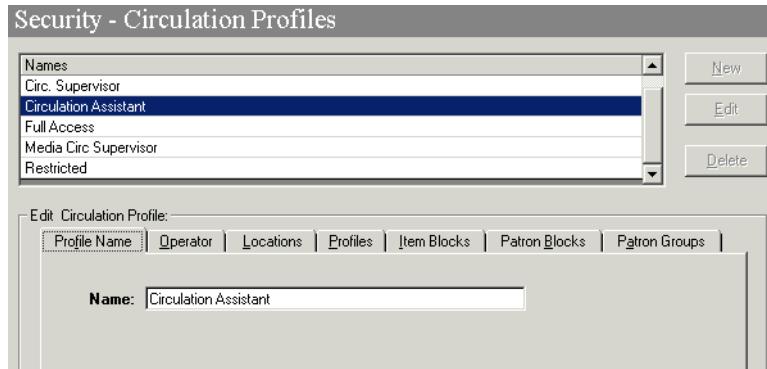
1. Access the **Security - Circulation Profiles** workspace.
  - a. Click **Security** in the listbar.
  - b. Click the **Circulation Profiles** button in the Security listbar.

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 9-69](#)).

---



---

**Figure 9-69. 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.

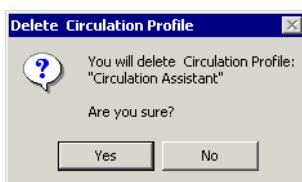
1. Access the **Security - Circulation Profiles** workspace.
  - a. Click **Security** in the listbar.
  - b. Click the **Circulation Profiles** button in the Security listbar.

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 9-70](#)).

---



---

**Figure 9-70. 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.

---

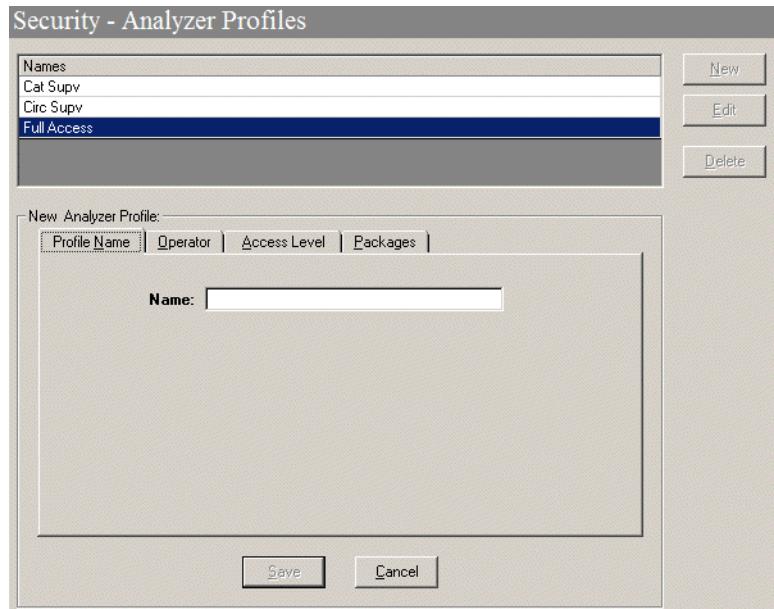
## Analyzer Profiles - Creating, Editing, and Deleting

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 9-71](#)) contains the tabs: **Profile Name**, **Operator**, **Access Level**, and **Packages**.



**Figure 9-71.** Security - Analyzer Profiles Workspace

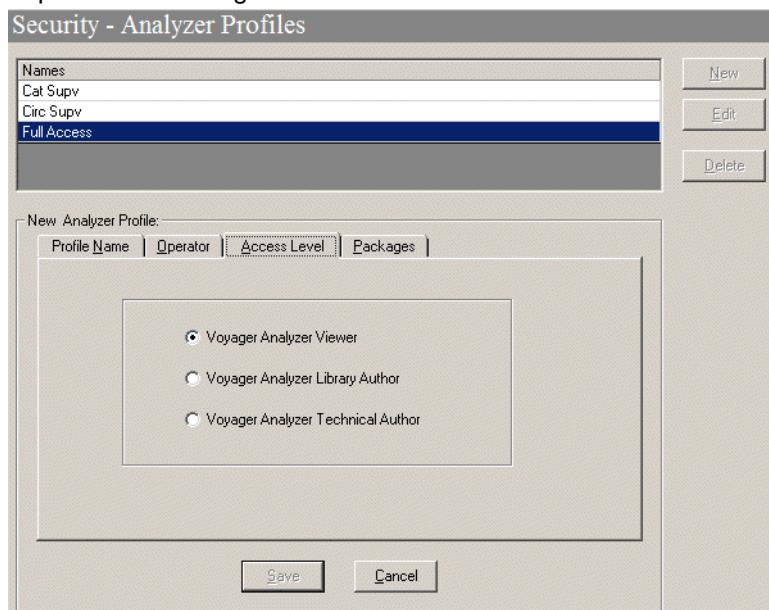
The **Profile Name** and **Operator** tabs are common elements which are discussed in section [Common Elements in all Security Profiles](#) on page 9-5.

## 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 9-72](#) displays the **Access Level** tab in the **Security - Analyzer Profiles** workspace.

vsaseccircpatronblockstab.gif



**Figure 9-72. Access Level Tab**

[Table 9-16](#) describes the fields found on the **Access Level** tab of the **Security - Analyzer Profile** workspace.

**Table 9-16. Patron Blocks Tab**

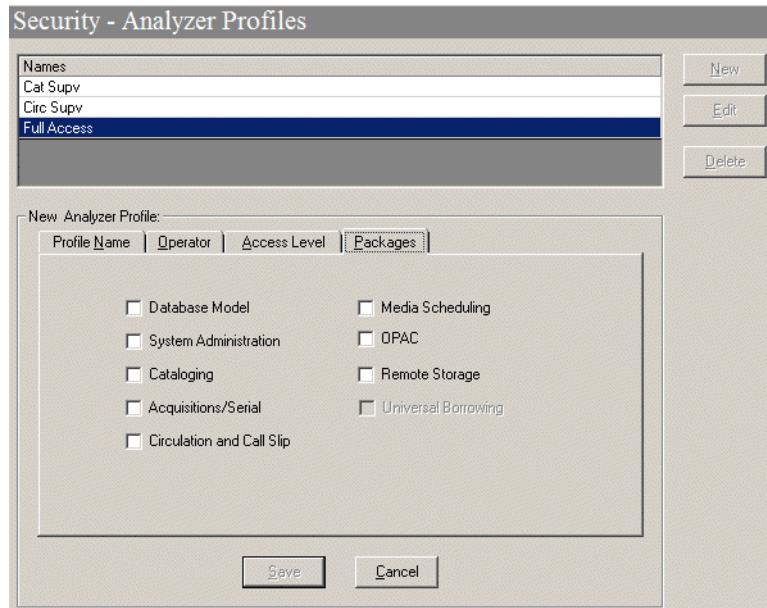
Field Name	Description	Reqd.	Type
Voyager Analyzer Viewer	Allows the operator to run reports for the specified packages.	No	Radio button.
Voyager Analyzer Library Author	Allows the operator to run reports and create Query Studio reports for the specified packages.	No	Radio button.

**Table 9-16. Patron Blocks Tab**

Field Name	Description	Reqd.	Type
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 9-73](#)) allows administrators to assign a package, which allows an operator to access the reports that are associated with that module or functionality.

**Figure 9-73. Packages Tab**

---

[Table 9-17](#) describes the fields on the **Packages** tab of the **Security - Analyzer Profile** workspace.

**Table 9-17. Packages Tab**

Name	Description	Reqd.	Type
Database Model	Provides access to all reports, not just the reports associated with a specific module or functionality.  <b>NOTE:</b> Selecting this checkbox, 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 9-16](#).



### Procedure 9-17. Creating an Analyzer Profile

---

Perform the following steps to create an Analyzer Profile:

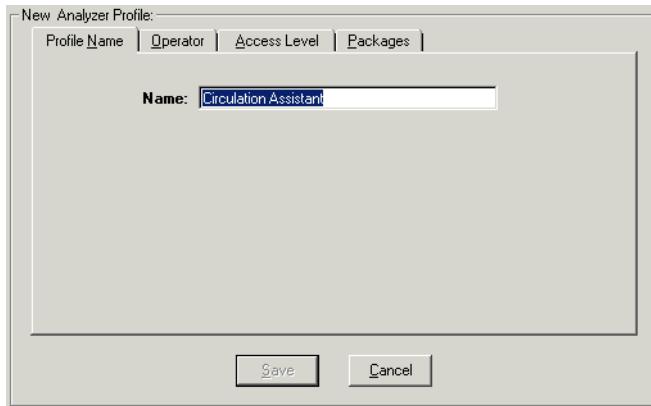
1. Access the **Security - Analyzer Profiles** workspace.
  - a. Click **Security** in the listbar.
  - b. Click the **Analyzer Profiles** button in the Security listbar.

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 9-74](#)).

---



---

**Figure 9-74. Security - Analyzer Profiles Workspace, Profile Name Tab**

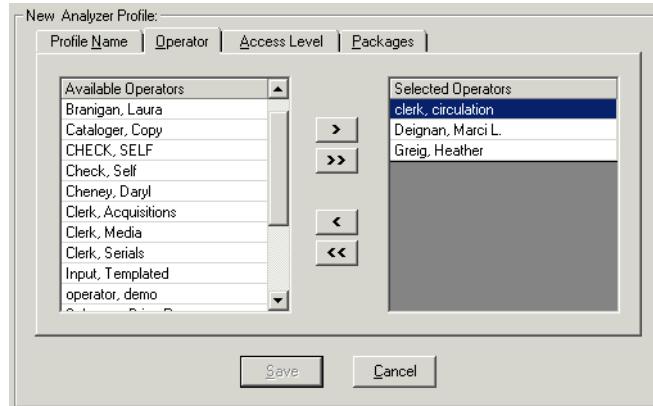
3. Enter the profile name in the **Profile Name** field.
4. Click the **Operator** tab to select the operators you want to link to this profile.
  - a. Highlight one or more operators from the **Available Operators** list.
  - b. Click the **>** button.

**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 9-75](#)).

---

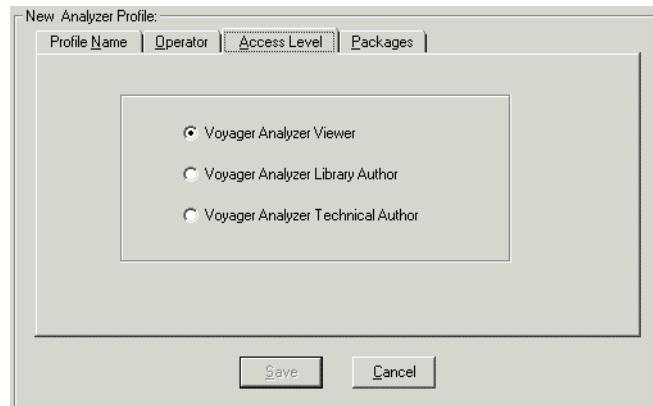


**Figure 9-75. Completed Operator Tab**

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 9-76](#)).

---



**Figure 9-76. Completed Access Level Tab**

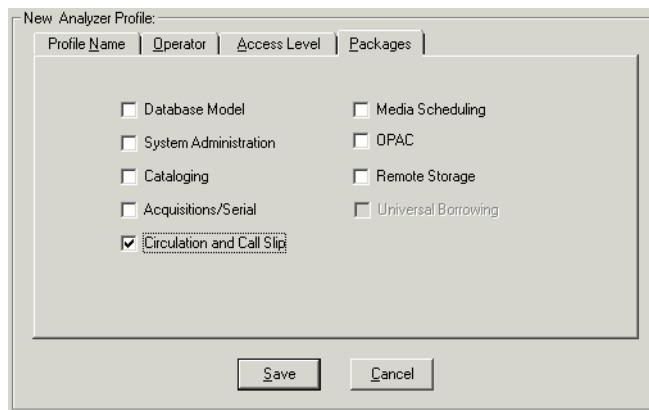
6. Click the **Packages** tab and select one of the packages.

**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 9-77](#)).

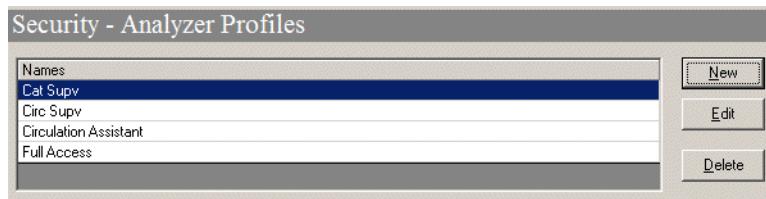
---



**Figure 9-77. 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 9-78](#)).



**Figure 9-78. 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**

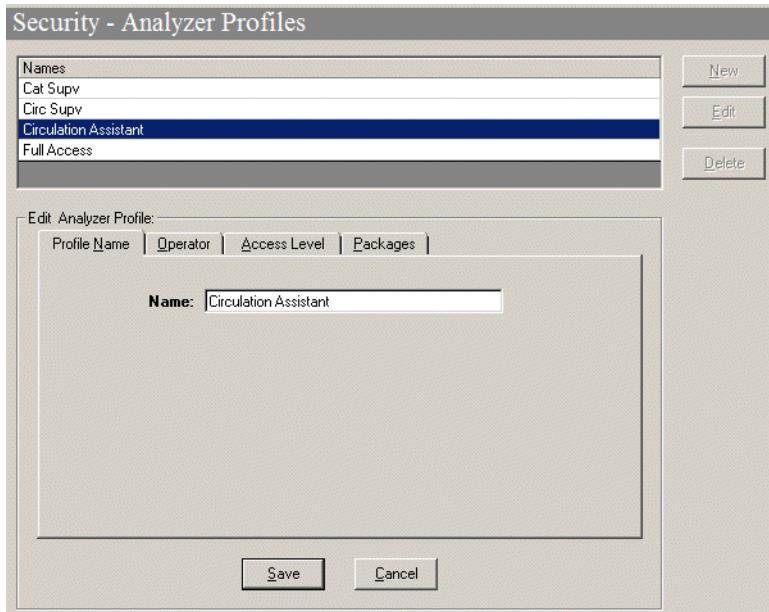
Use the following to edit an Analyzer Profile.

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 9-79](#)).



---

**Figure 9-79. 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.

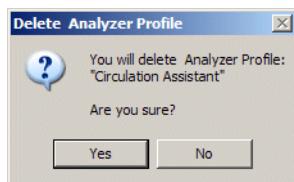
- 
- b. Click the **Analyzer Profiles** button in the Security listbar.

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 9-80](#)).

---



---

**Figure 9-80. 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.

---

---

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## **Contents**

**Endeavor Information Systems, Inc.**  
See notice on first page

## Introduction

---

This chapter provides detailed descriptions of all of the essential data elements or building blocks that you must define in System Administration (see [Figure 10-1](#)).

- Access Control Groups
- Base Currency
- Default Address
- Fines/Fees
- Item Types
- Locations
- Location Limit Groups
- Miscellaneous
- Owning Libraries
- Print Locations
- Statistical Categories



---

**Figure 10-1. System listbar**

## Access Control Groups

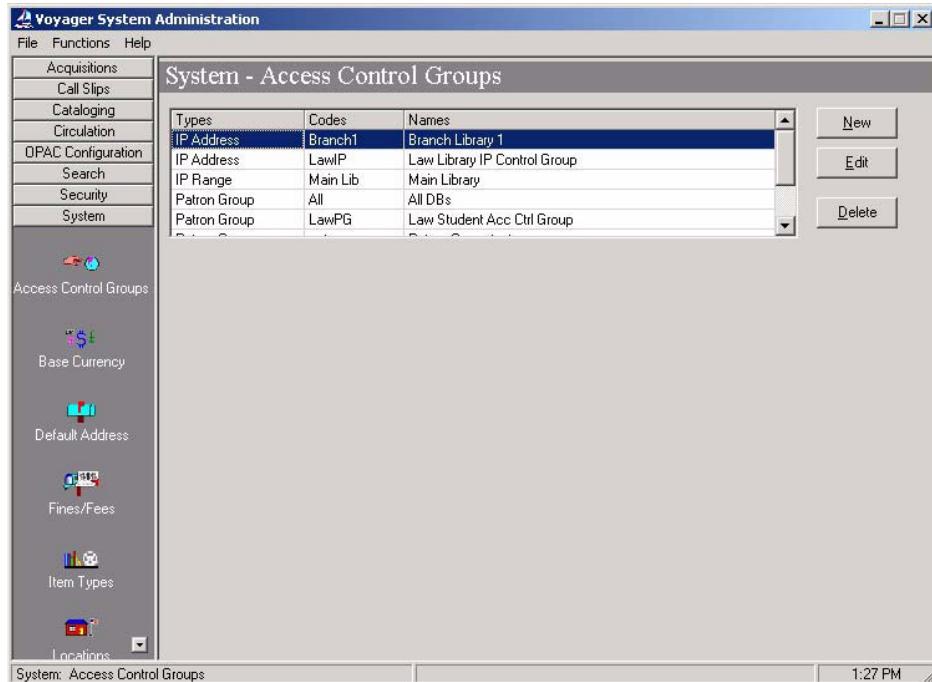
---

The **Access Control Groups** dialog box allows you to create, edit, and delete access groups. Access groups provide a way for your institution to control access to non-public databases. Once you create an access group, it will appear 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 non-public databases. See [Database Definitions on page 8-17](#) for more information about associating access groups with non-public databases.

See [Figure 10-2](#) for the Access Control Groups list screen.

---



---

**Figure 10-2. Access Control Groups list**

---

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 7-8.

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 non-public 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 non-public databases are available to patrons before logging into WebVoyage 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 non-public databases in the Database Definitions activity. When a patron logs into WebVoyage, any non-public 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 non-public databases in the Database Definitions activity. When a WebVoyage client is launched from a computer having an IP address that matches an IP address associated with one or more access group, the non-public databases that those access groups have been associated with are available to anyone using that computer.

**Table 10-1. Access Groups**

<b>Access Group Type</b>	<b>Patron or Location Specific</b>	<b>Description</b>
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 non-public databases in the Database Definitions activity. When a WebVoyage client is launched from a computer having an IP address that falls within an IP range associated with one or more access groups, the non-public 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 non-public databases in the Database Definitions activity. When a WebVoyage client is launched from a computer having a domain name that matches a domain name associated with one or more access groups, the non-public 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 10-3](#)).



## 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 10-3](#)). 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 10-3](#)).

Editing an existing control group      click the **Edit** button

Result: The **Edit Access Control Group** dialog box opens.



**Figure 10-3.** 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 <a href="#">Patron Groups tab on page 10-7</a>
you selected IP address	proceed to the <a href="#">IP address tab on page 10-8</a>
you selected IP range	proceed to the <a href="#">IP range Tab on page 10-10</a>
you selected Domain name	proceed to the <a href="#">Domain Name tab on page 10-11</a>

**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 10-4](#), 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 10-4. 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 10-5](#).



### 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.

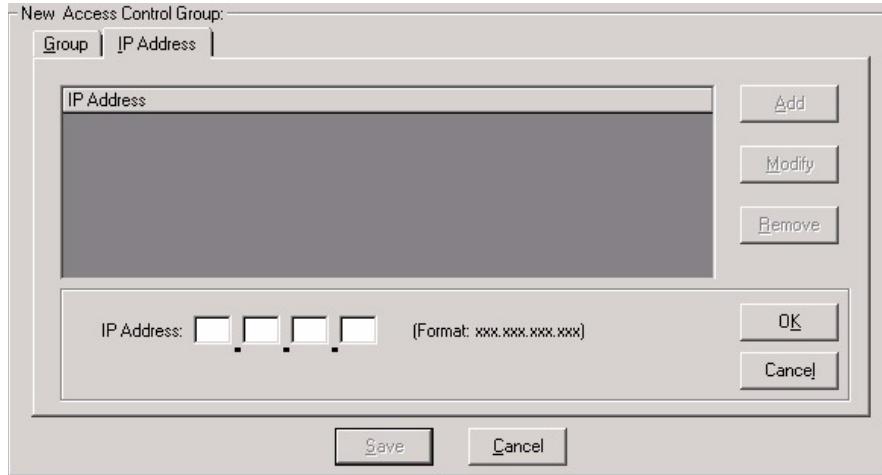
Result: The IP Address fields appear on the dialog box (see [Figure 10-5](#)).

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 10-5. 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 10-6](#).



### Procedure 10-3. Adding or Editing an IP Range

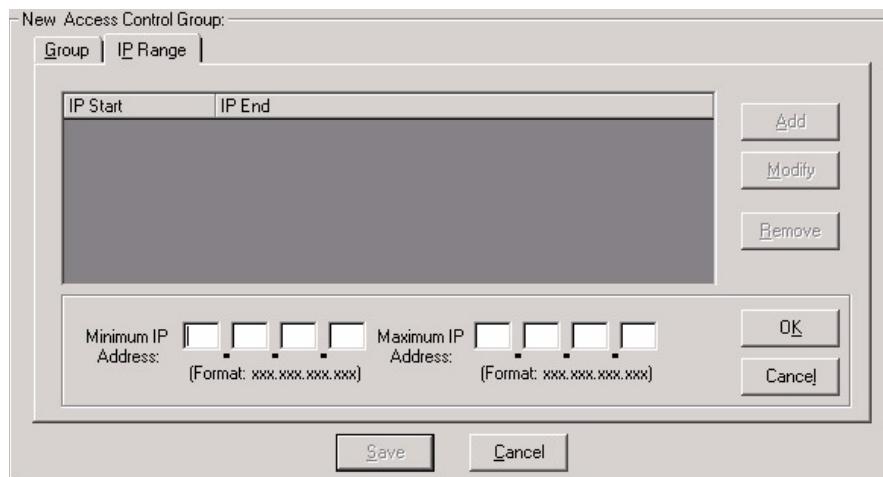
Use the following to add or edit an IP range.

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 10-6](#)).

---



---

**Figure 10-6. 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 10-7](#).

**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 prl.nrf.weeg.end.edu. In this case, only computers whose domain names include prl.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 10-7](#)).

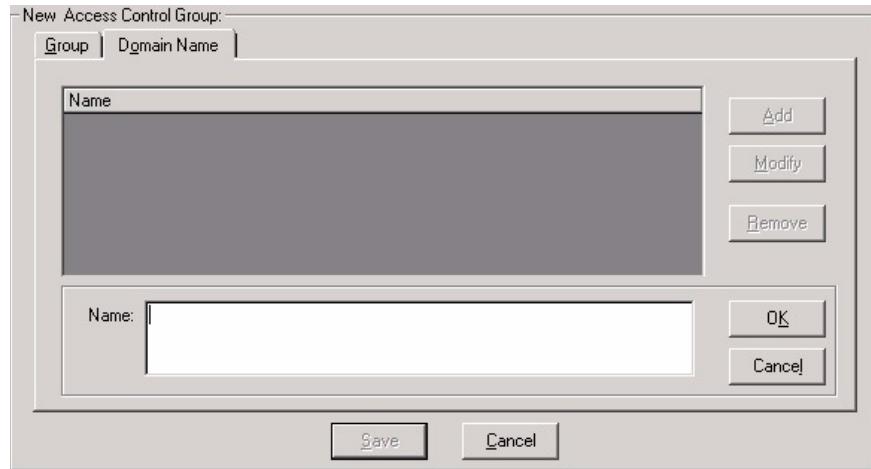


Figure 10-7. Access Control Group Definitions dialog box - Domain name tab

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 Engagement Consultant to define your base currency if your site is in the implementation process.*

*If you need to edit the Base Currency information contact Endeavor's Customer Support department because this affects many records in the system.*

## Security

---

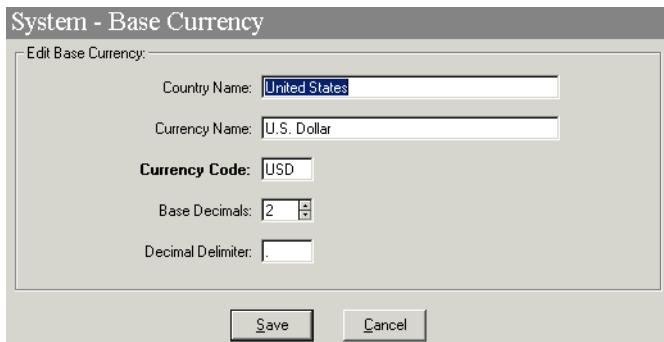
Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked are able to access the **System - Base Currency** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on page 9-23.

## Base Currency Workspace

[Figure 10-8](#) 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 10-8. 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: <ul style="list-style-type: none"><li>• U.S. Dollar</li><li>• Euro</li></ul>	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.
Currency Code	A applicable three-letter code for this currency For example: <ul style="list-style-type: none"><li>• usd</li><li>• frf</li></ul>	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 10-38](#) 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 9-23](#).

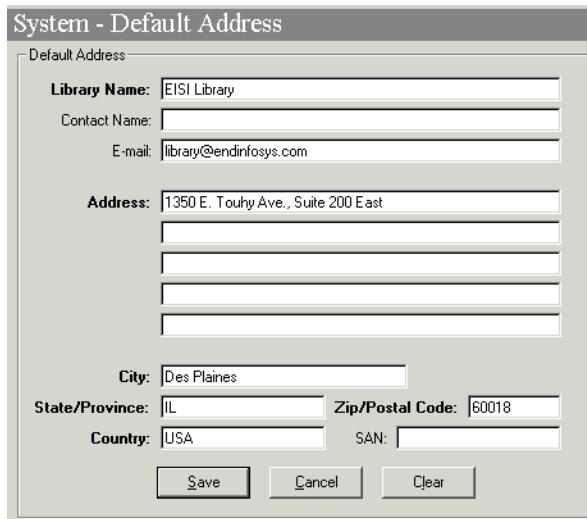
## Default Address Workspace

---

Creating and editing the Default Address is done in the **System - Default Address** workspace.

When entering the **System - Default Address** workspace (see [Figure 10-9](#)), it shows the library name, contact info, and default address if defined.

---



---

**Figure 10-9. 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: <ul style="list-style-type: none"><li>• University Library System</li><li>• Main Library</li></ul>	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: <ul style="list-style-type: none"><li>• Main Office</li></ul>	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.

## **Fine/Fees**

In this section sites can define various fine and fee reasons as well as payment types.

A Fine/Fee Reason refers to a penalty fine or a service/product fee that you assess against patrons.

A Payment type 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.

## **Security**

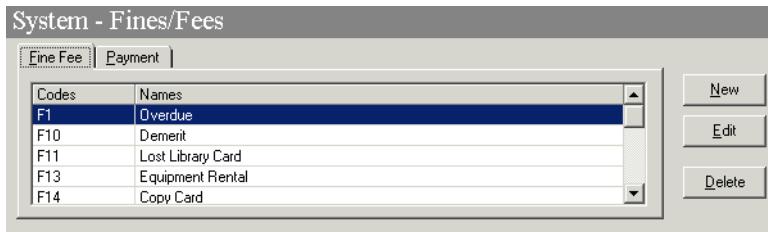
Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **System - Fines/Fees** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-23](#).

## **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 10-10](#)). It opens to the **Fine Fee** tab and shows the names of any fine or fee reasons already defined.



**Figure 10-10. 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:

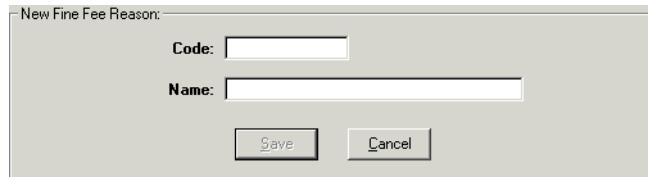
- Overdue Fine
- Lost Item Replacement Cost
- Lost Item Processing Fee
- Media Booking Late Charge
- Media Booking Usage Fee
- Equipment Replacement
- Lost Equipment Processing
- Accrued Fine
- Accrued Demerit
- Demerit

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 5-50](#) 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 10-11](#)). In this example, the fields are blank because the **New** button was selected.

---



New Fine Fee Reason:

Code:

Name:

---

**Figure 10-11.** 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: <ul style="list-style-type: none"><li>• Database Search</li><li>• Photocopying</li><li>• Room Rental</li><li>• AV Rental</li><li>• Miscellaneous</li></ul>	Yes	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.

### Payment Tab

Using the **Payment** tab, sites define their 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:

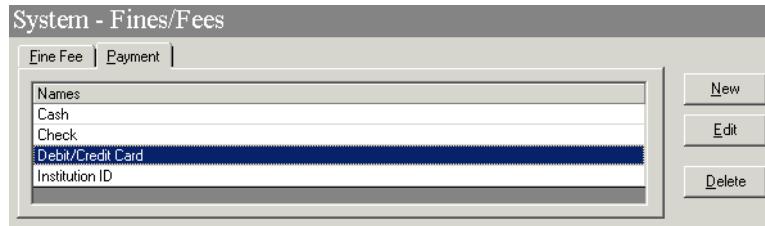
- Cash
- Check

Any other payment types may be edited or deleted, for example Debit/Credit card.

---

[Figure 10-12](#) shows the **Payment** tab.

---

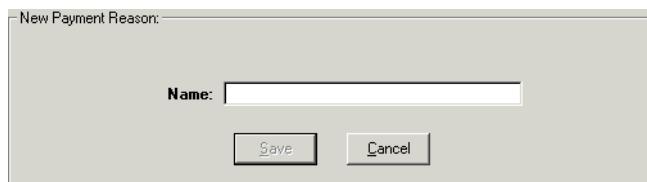


---

**Figure 10-12.** 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 10-13](#)). In this example, the field is blank because the **New** button was selected.

---



---

**Figure 10-13.** 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 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 10-9. 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 10-10. 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 10-11. Deleting a Fine or Fee Reason**

---

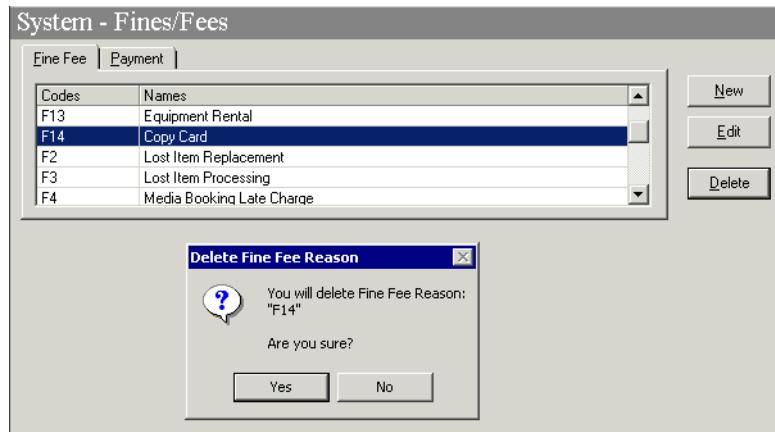
Use the following to delete a Fine or Fee Reason.

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 10-14](#)).



**Figure 10-14. 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.

## 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 10-12. 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 10-13. 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 10-14. Deleting a Payment Type**

---

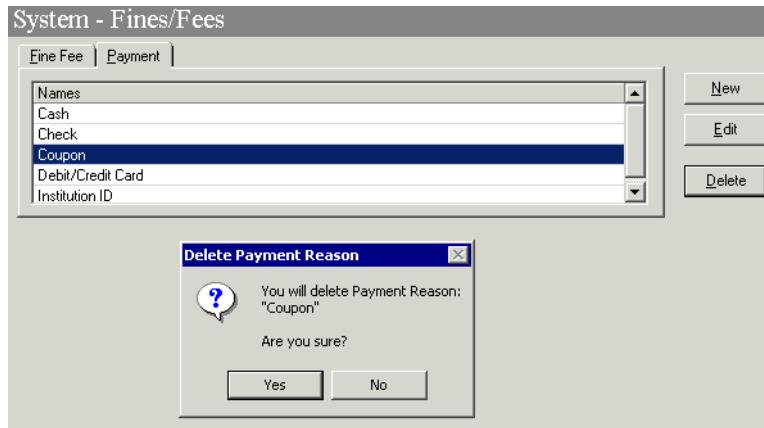
Use the following to delete a Payment Type.

- 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 10-15](#)).



---

**Figure 10-15. 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.

---

## 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.

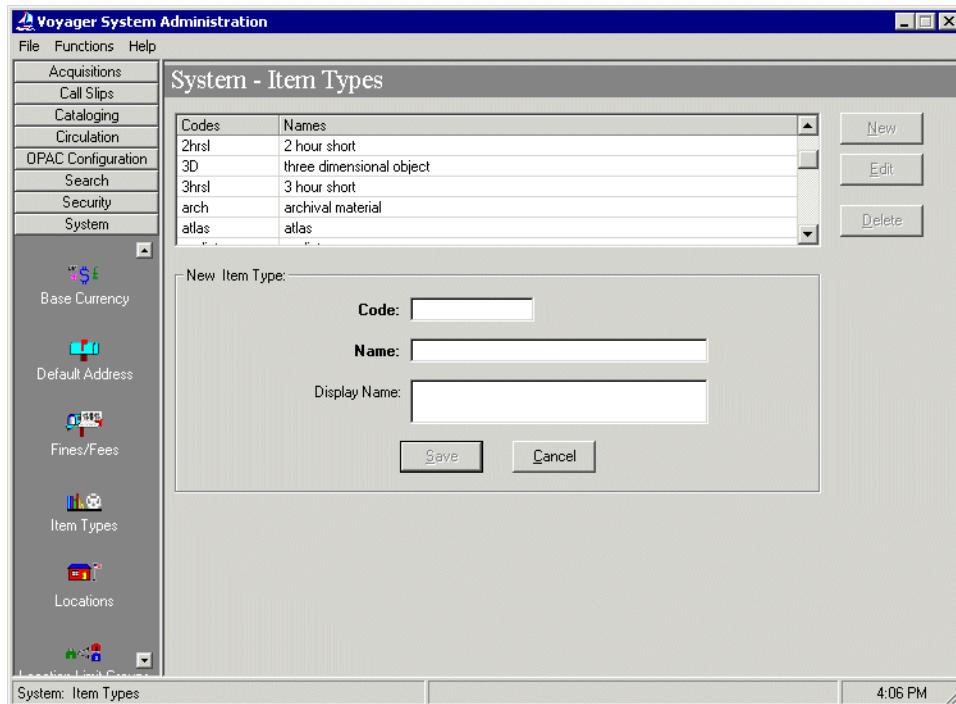
- An Item Type is stored in an item record as part of the identification process.
- An Item Type is one of the elements determining circulation policy.
- Item Types have default replacement values that are used for lost item processing when the **Price** field of the item record is blank.

## 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 9-23.

## Item Types Workspace

Item Types are defined in the **System - Item Types** workspace (see [Figure 10-16](#)).



**Figure 10-16.** 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	<p>Any category of material that you would treat distinctly for circulation purposes should be defined as an Item Type.</p> <p>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.</p> <p>These Item Types display in A-Z lists to operators who must assign one Item Type for each item record they create.</p> <p>You should define Item Types that are clearly recognizable to staff working with these records to promote consistency and enhance database quality.</p> <p>Since default replacement values are defined for Item Types, you should also consider this factor when you discuss which Item Types you need.</p>	Alphanumeric, punctuation, and spaces. Uppercase and lowercase allowed. 25 characters.
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 10-15. 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 Circulation 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 10-16. 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 10-17. Deleting an Item Type**

---

Use the following to delete an Item Type.

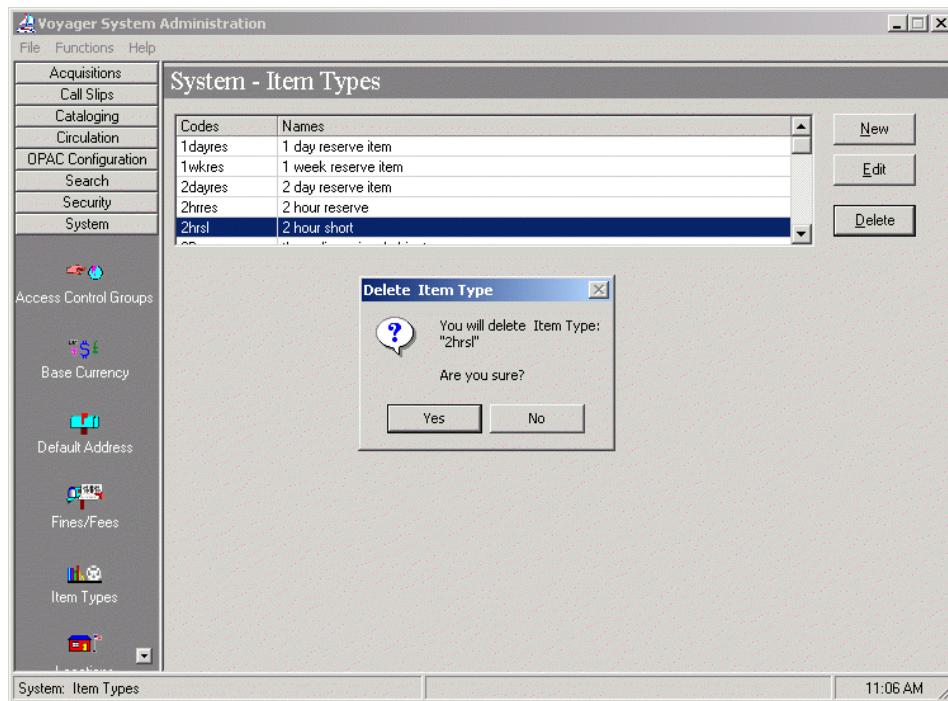
1. Access the System Administration module's **System - Item Types** workspace.
  - a. Click **System** in the listbar.
  - b. Click the **Item Types** button in the System listbar.

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 10-17](#)).

---



---

**Figure 10-17. 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 10-18](#) shows the **Acquisitions - Policy Definitions** workspace where Acquisition happening locations are defined. See [Acquisitions - Policy Definitions Workspace](#) on page 2-42 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.

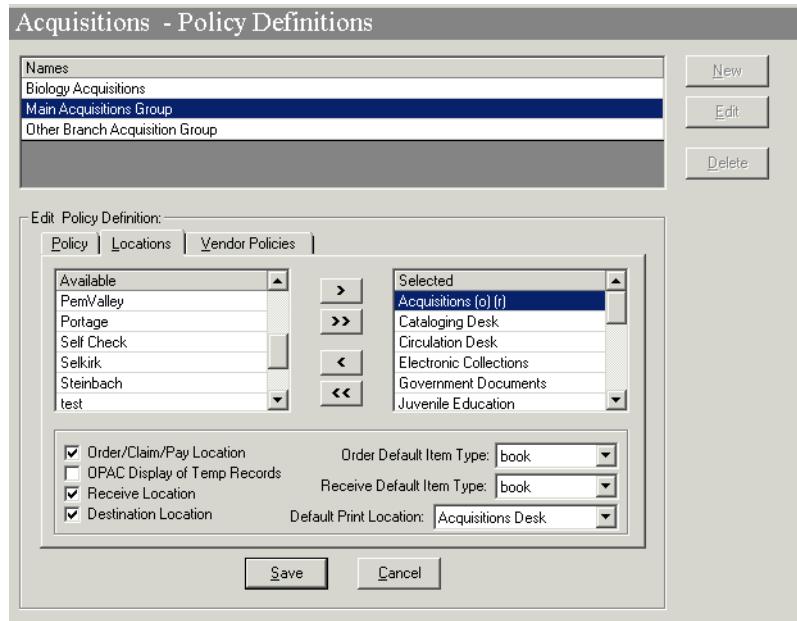
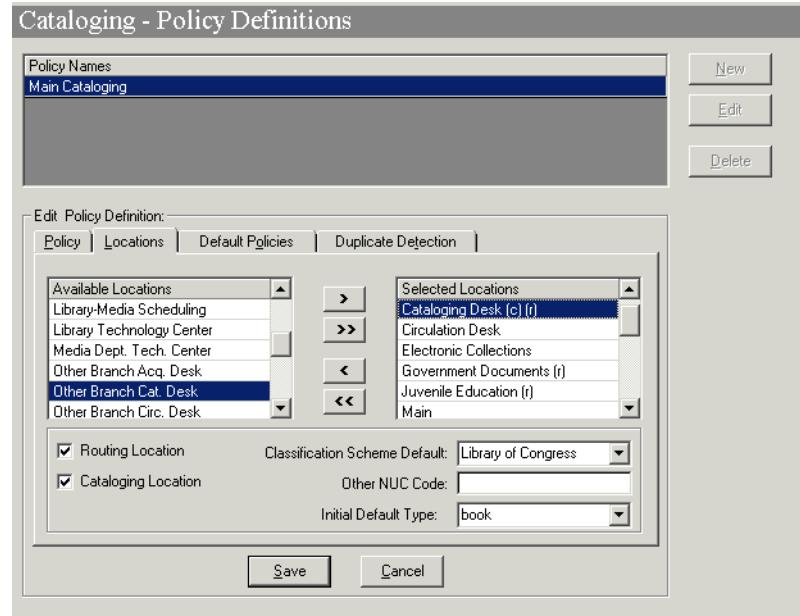


Figure 10-18. Acquisitions - Policy Definitions, Acquisitions happening location

### Cataloging Happening Location

Cataloging desks are where cataloging activity occurs. [Figure 10-19](#) shows the **Cataloging - Policy Definitions** workspace where Cataloging happening locations are defined. See [Policy Definitions](#) on [page 4-60](#) for more information.

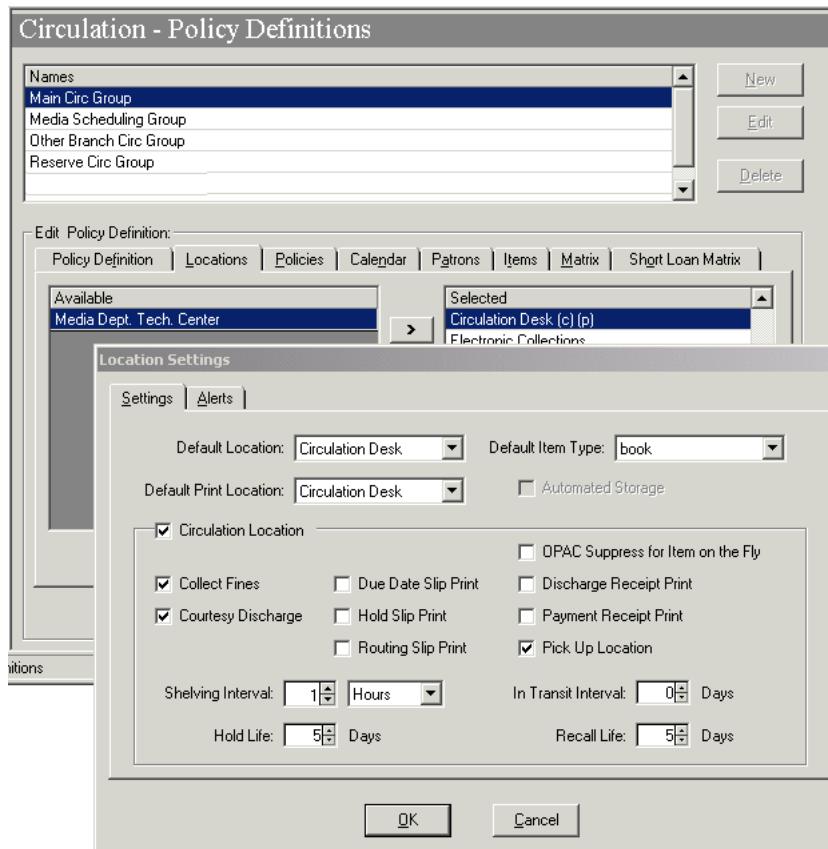


---

Figure 10-19. Cataloging - Policy Definitions, Cataloging happening location

### Circulation Happening Location

Circulation desks are where circulation activity such as, charging, renewing, requesting, and discharging occurs. [Figure 10-20](#) shows the **Circulation - Policy Definitions** workspace where Circulation happening locations are defined. See [Circulation Policy Definition Workspace](#) on [page 5-50](#) for more information.



**Figure 10-20. 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**

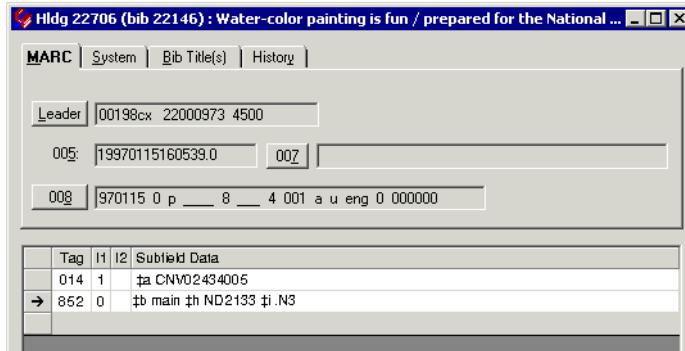
A storage location is where materials are stored in the library, such as stacks, reference, off-site storage, rare books room, and so forth.

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

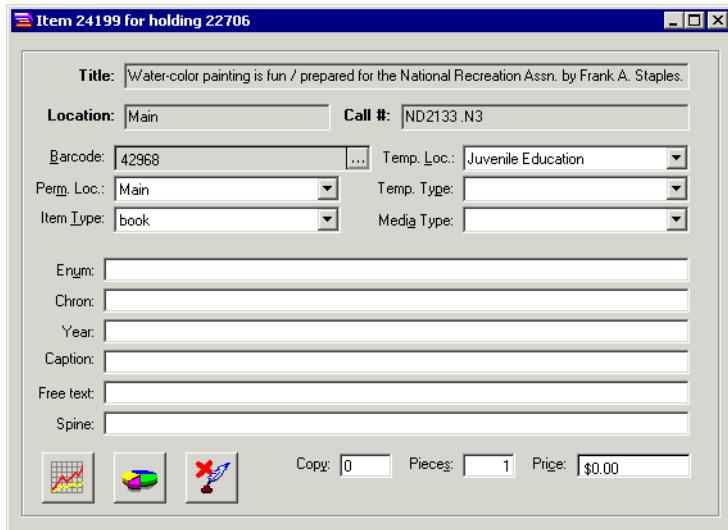
There are several names used to denote storage locations. Storage locations are also called holdings, permanent (shelving), temporary (shelving), destination, and intended locations.

- The holdings location is used in the MARC Format for Holdings Data (MFHD), [Figure 10-21](#), and it populates the **Location** field on the item record, [Figure 10-22](#).
- 



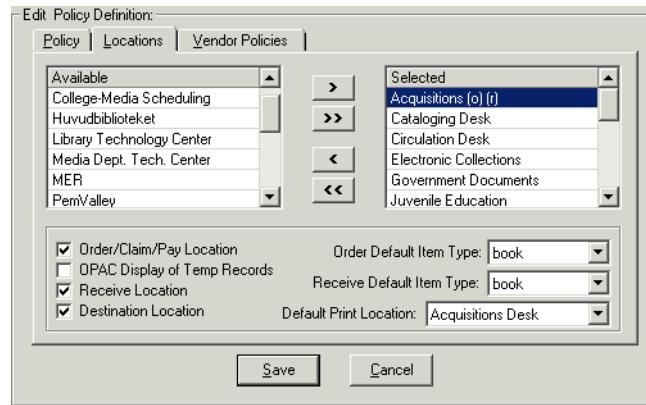
**Figure 10-21.** MFHD storage location

- The permanent location, in the item record, is the item's shelving location, providing there is no temporary location. [Figure 10-22](#) shows an item record with the item's permanent location and temporary location.



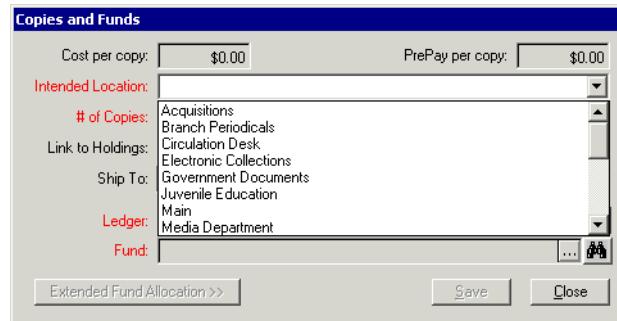
**Figure 10-22. Item Record's Perm.[manent] and Temp.[orary] locations**

- The temporary location in the item record is the item's shelving location; see [Figure 10-22](#). 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 10-23](#).



**Figure 10-23. 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 10-24](#). 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 10-24. 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 9-10](#) 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 9-23](#).

### 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 10-25](#)). It shows the names of any Locations already defined.

System - Locations		
Codes	Names	Owning Library
Bacq	Other Branch Acq. Desk	Training Master DB
Bcat	Other Branch Cat. Desk	Branch Library
Bcirc	Other Branch Circ. Desk	Branch Library
Bgen	Branch General	Branch Library
biology	Biology	Law Library

New  
Edit  
Delete

**Figure 10-25.** System - Locations Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **System - Locations** workspace opens (see [Figure 10-26](#)). 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
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 Cataloguing Policy Group: <None>

Current Acquisition/Serials Policy Group: <None>

Current Circulation Policy Group: <None>

**Figure 10-26.** 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	<p>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).</p> <p>The code must be unique.</p> <p>For example:</p> <ul style="list-style-type: none"><li>• Main</li><li>• Legal</li><li>• Reserves</li></ul>	Yes	<p>Alphanumeric, punctuation, and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>10 characters.</p> <p><b>NOTE:</b> Although this is part of the MARC record it uses the Latin-1 character set.</p>
[Location] Name	<p>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.</p> <p>Unless you define a Location OPAC (WebVoyage) Display Name, the Location Name displays in WebVoyage.</p> <p>For example:</p> <ul style="list-style-type: none"><li>• Main Library</li><li>• Law - Case Reporters</li></ul>	Yes	<p>Alphanumeric, punctuation, and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>25 characters.</p>
Spine Label Name	<p>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.</p> <p>For example:</p> <ul style="list-style-type: none"><li>• MAIN</li><li>• LAW</li></ul>	No	<p>Alphanumeric, punctuation, and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>25 characters.</p>

**Table 10-7. Fields in the System - Locations Workspace**

Name	Description	Required	Type and Range
OPAC Display Name	<p>If left blank, the system automatically uses the Location Name.</p> <p>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.</p> <p>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.</p> <p>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.</p>	No	<p>Alphanumeric, punctuation, and spaces.</p> <p>Uppercase and lowercase allowed.</p> <p>60 characters.</p>
Owning Library	<p>Owning library to which this location is associated.</p> <p>See <a href="#">Owning Libraries on page 10-75</a> for information on defining owning libraries</p>	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	<p>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.</p> <p>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>.)</p> <p>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.</p> <p>If an item is temporarily housed in a staff department, you still probably want it displayed in WebVoyage with an accurate location.</p>	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	<p>When checked, the Address information for this location displays in the System Address dialog box. See <a href="#">System Address Dialog box on page 10-51</a>.</p> <p>Once a location code and name are provided, the Address button becomes active.</p>		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 10-17. 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 10-17.

**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 10-27](#) shows the **System Address** dialog box.

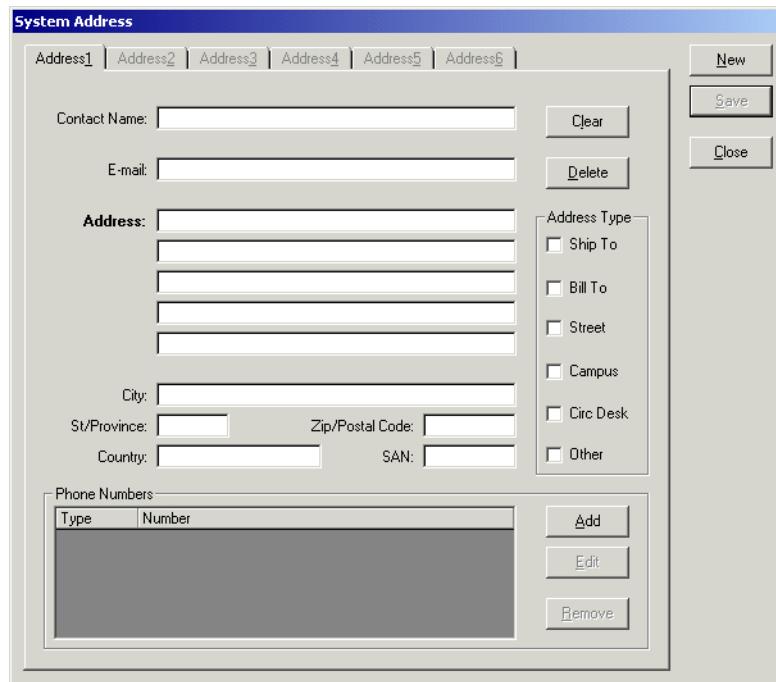


Figure 10-27. System Address dialog box for a location

#### 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 10-28](#) shows the **Phone Numbers** dialog box.

#### NOTE:

Telephone numbers do not print on purchase orders.

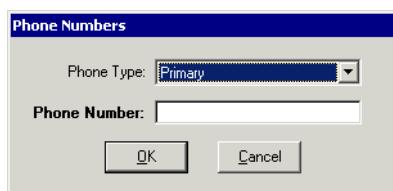


Figure 10-28. Phone Numbers dialog box

## 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
<b>Address Type section</b>			
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.
<b>Address section</b>			
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
<b>Phone Numbers section</b>			
Phone Number Type	Type of phone number. <ul style="list-style-type: none"><li>• Primary</li><li>• Mobile</li><li>• Fax</li><li>• Other</li></ul> 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 10-18. 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.

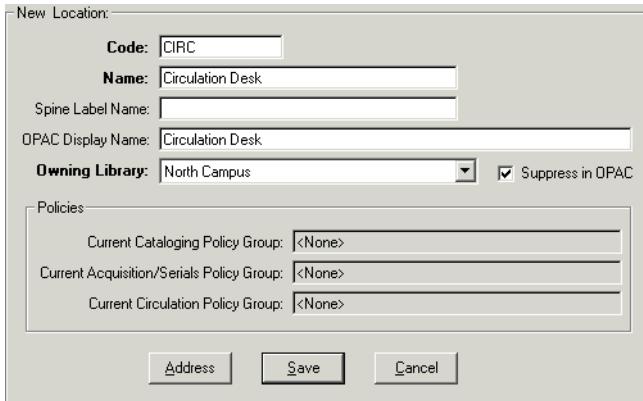
Result: The **System - Locations** workspace opens.

  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 10-29](#) shows an example of the New Location section with the fields completed.



---

**Figure 10-29. Example of a completed New Location section**

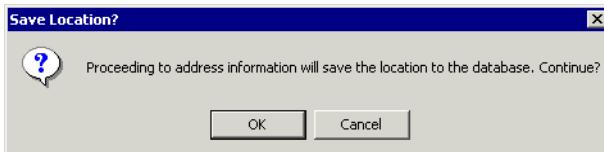
9. Click **Save** to save the information, click **Address** to provide the address information or click **Cancel** to return to the **System - Locations** workspace.

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 10-30](#)) and asks the operator if they want to continue.

---



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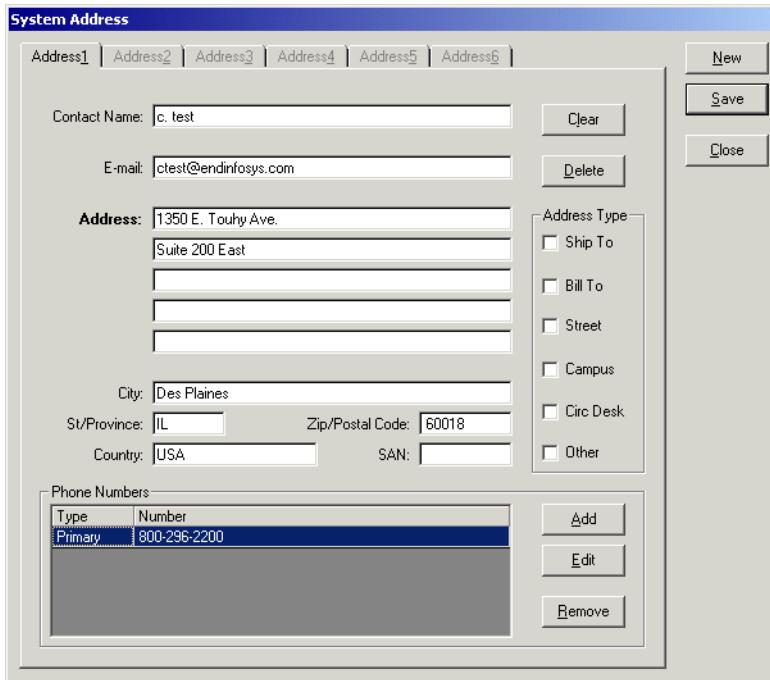
**Figure 10-30. Warning that location will be saved message**

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 10-31](#) shows an example of a completed **System Address** dialog box, with phone number information included.



---

**Figure 10-31. Example of a completed System Address dialog box**

13. 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 9-36](#), [Cataloging Profiles - Creating, Editing, and Deleting](#) on [page 9-54](#), and [Circulation Profiles - Creating, Editing, and Deleting](#) on [page 9-71](#).

### **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 9-23](#) 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 2-44](#) 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 4-60](#) for information on adding a location to a Cataloguing Policy Group. If you plan to catalog items for the new location, you must add it to a cataloguing policy group.

See [Locations Tab on page 5-54](#) 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 for any or all locations or add new ones.

If you change a Location Name, Location Code, or Location OPAC Display Name, that change is reflected throughout the database wherever that information is used except it is not reflected in existing holdings records in the 852 subfield b.



### **Procedure 10-19. 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 Circulation User's Guide*.

## **Deleting a Location**

---

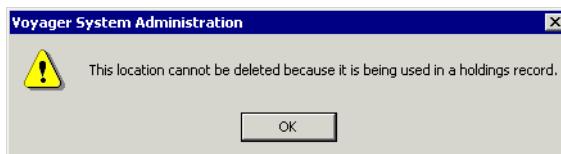
This section provides step-by-step instructions on how to delete a Location in the System section of the System Administration module.

**▲ 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 10-32](#)).

---



---

**Figure 10-32. 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 10-20. 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 10-33](#)).

---



---

**Figure 10-33. 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 10-21. Creating or Editing Location Limit Groups

---

Use the following to create or edit a Location Limit Group.

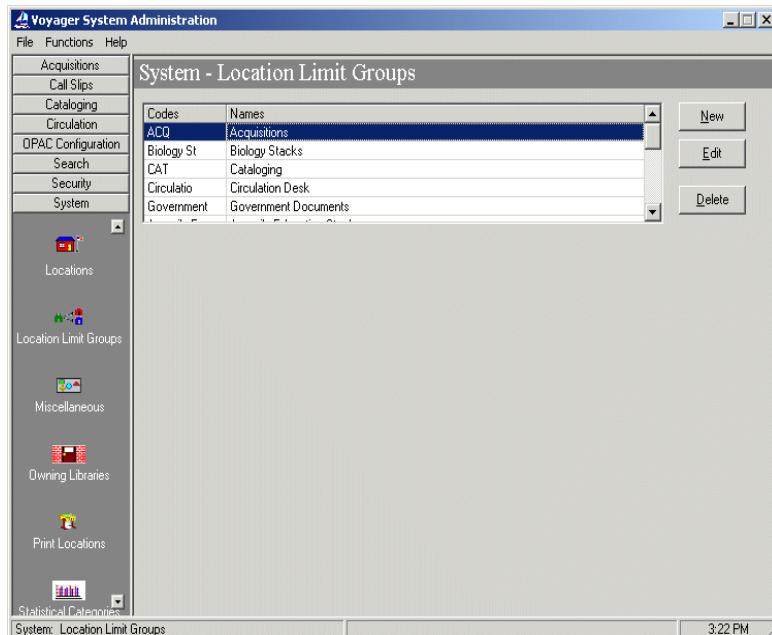
1. Click **System** on the listbar in Voyager System Administration.

Result: The Voyager **System** options display in the vertical listbar area. See [Figure 10-1](#).

2. Click **Location Limit Groups**.

Result: The **System - Location Limit Groups** dialog box opens. See [Figure 10-34](#).

---



---

**Figure 10-34. System - Location Limit Groups main dialog box**

---

If you are...

Then...

---

Adding a new group

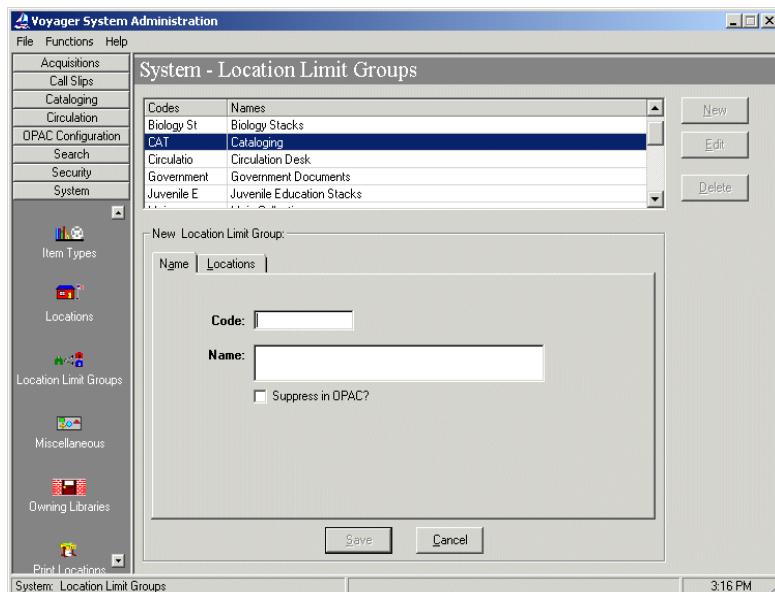
click the **New** button

Editing an existing group

1. Select the appropriate group
2. click the **Edit** button

Result: The **Edit Location Limit Group** dialog box opens.

---



---

**Figure 10-35.** New Location Limit Groups dialog box

3. Enter a group code in the **Code** field.

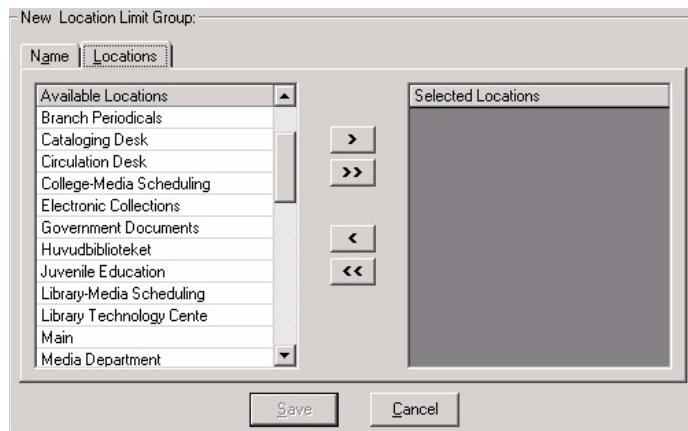
4. Enter a group name in the **Name** field. See [Table 10-9](#) for a description of each option.

**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 WebVoyage. 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 10-36](#)).



**Figure 10-36. 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.

6. 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 10-22. 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. See [Figure 10-1](#).

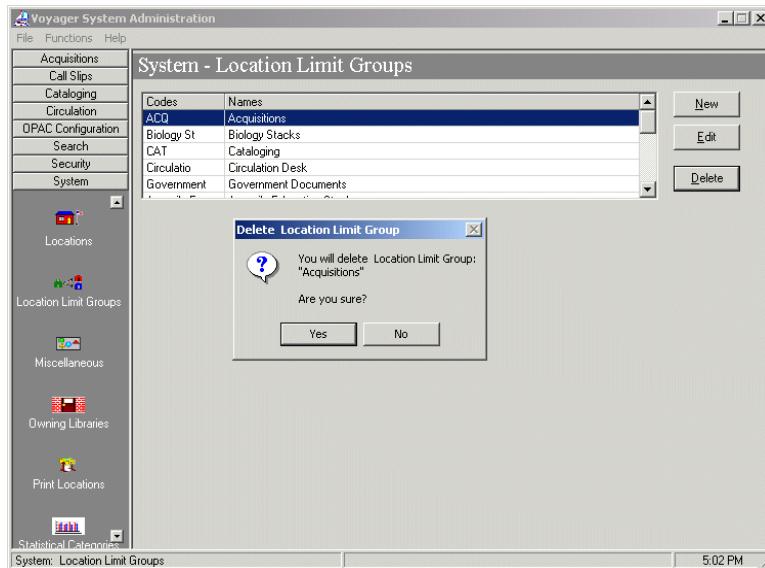
2. Click **Location Limit Groups**.

Result: The **System - Location Limit Groups** dialog box opens. See [Figure 10-34](#).

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 10-37](#).

---



**Figure 10-37. 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 10-38](#)) 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

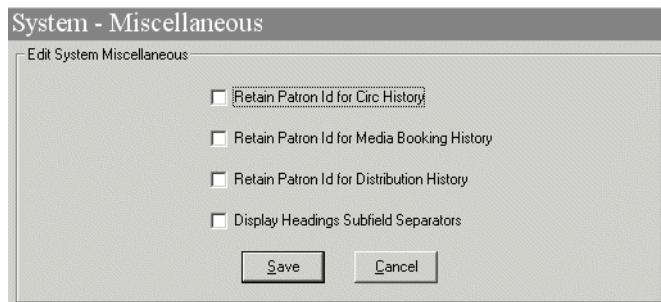
**NOTE:**

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 10-38. System - Miscellaneous Workspace**

### Miscellaneous Workspace Field Descriptions

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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 <b>Item Circulation History</b> 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	<p>If this check box is not checked, there is no record of which patron charged which media items.</p> <p>When checked, the identification of all patrons who have charged media items is retained.</p> <p>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.</p> <p><b>NOTE:</b> In order for historical bookings to be searchable, you must also place a check in the <b>View Historical?</b> 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.</p>	No	Check box The default is unchecked.
Retain Patron Id for Distribution History	<p>If this check box is not checked, there is no record of which patron received which items.</p> <p>When checked, the identification of all patrons who received a distributed item is retained.</p> <p>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.</p> <p><b>NOTE:</b> This information is stored in the <b>DISTRIBUTION_TRANSACTION</b> database table that can be accessed by performing an SQL query. It is not viewable in the circulation module.</p>	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	<p>If checked, a visual separator (--) is generated between a subject heading (6xx) and its subdivisions (fv, fx, fy, and fz) for subsequent bibliographic record additions and modifications.</p> <p>If unchecked, the visual separators are not added to the display headings information in the database for subsequent bibliographic record additions and modifications.</p> <p><b>! IMPORTANT:</b>  <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 Endeavor Information Systems Inc. Customer Support to schedule a regen.</i></p> <p>For more information, see <a href="#">Headings Subdivision Separators</a> on page 10-73.</p>	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 9-23.

**Headings Subdivision Separators**

While performing subject heading searches in Webvoyage and staff client modules such as Cataloging, headings (6xx) and their subdivisions (fv, fx, fy, and fz) 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 Endeavor Information Systems Inc. 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 10-39](#) shows the results of a subject headings search of the keyword cats? with no subdivision separators.

**Headings List**

Font: Arial

Bibs	OPAC Subject Headings Search Heading	Heading Type
1	Cats Mythology Congresses.	LC subject headings
1	Cats Religious aspects.	LC subject headings
1	Cats Religious aspects Congresses.	LC subject headings

OK Cancel Search Authority Clear All Copy

3 Headings Found Search: OPAC Subject Headings Search=cats?

---

**Figure 10-39. Example Headings Search with No Separators Displayed**

[Figure 10-40](#) shows the results of a subject headings search of the keyword cats? with subdivision separators.

**Headings List**

Font: Arial

Bibs	OPAC Subject Headings Search Heading	Heading Type
1	Cats--Mythology--Congresses.	LC subject headings
1	Cats--Religious aspects.	LC subject headings
1	Cats--Religious aspects--Congresses.	LC subject headings

OK Cancel Search Authority Clear All Copy

3 Headings Found Search: OPAC Subject Headings Search=cats?

---

**Figure 10-40. 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 10-23. Creating an Owning Library**

---

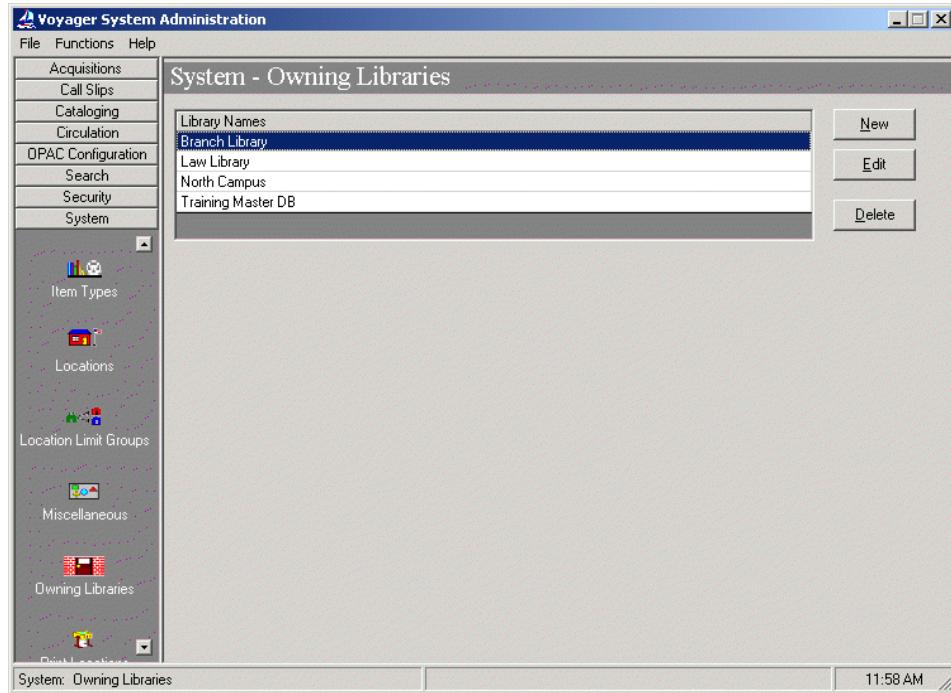
Use the following to create an Owning Library.

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 10-41](#)).

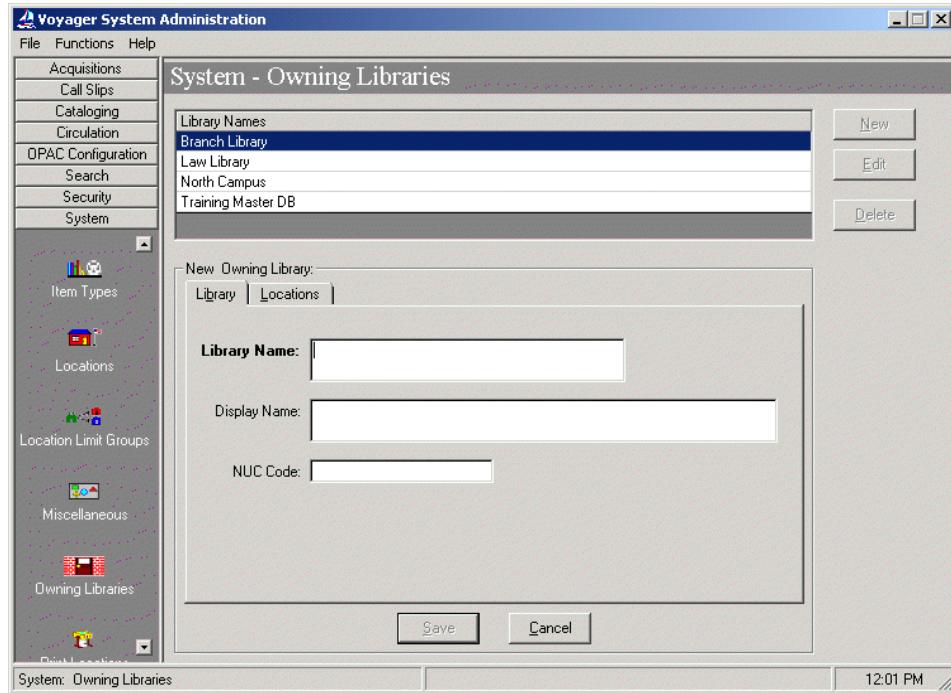


---

**Figure 10-41. System - Owning Libraries main dialog box**

3. Click **New**.

Result: The **New Owning Library** tab options display (see [Figure 10-42](#)).



**Figure 10-42.** 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 <b>Search Results</b> tab.

**Table 10-13. Library tab options**

<b>Options</b>	<b>Description</b>
NUC Code	<p>Enter the Owning Library's NUC code.</p> <p>During bulk import or online import, the National Union Catalog (NUC) code identifies the owning library.</p> <p>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.</p>

5. Enter the **Locations** tab options. See [Table 10-14](#) for a description of each option.

Result: This completes the definition of the **Locations** portion of an Owning Library.

**Table 10-14. Locations tab options**

<b>Options</b>	<b>Description</b>
Available Locations	<p>List of Available Locations (display of Names field entered/created in System - Locations) from which to select.</p> <p>Use the right-arrow button (  ) to move Available Locations to the Selected Locations list. Use the double-arrow button to move all locations.</p>
Selected Locations	<p>List of Selected Locations.</p> <p>Use the left-arrow button (  ) to return Selected Locations to the Available Locations list. Use the double-arrow button to move all locations.</p>

6. Click **Save** or click **Cancel**.

Result: This saves or cancels the **New Owning Library**.

## **Editing Owning Libraries**

This section provides step-by-step 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 10-24. 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 10-41](#).

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](#)).

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 10-25. Deleting an Owning Library

Use the following to delete an Owning Library.

1. Click **System** on the vertical listbar in Voyager System Administration.

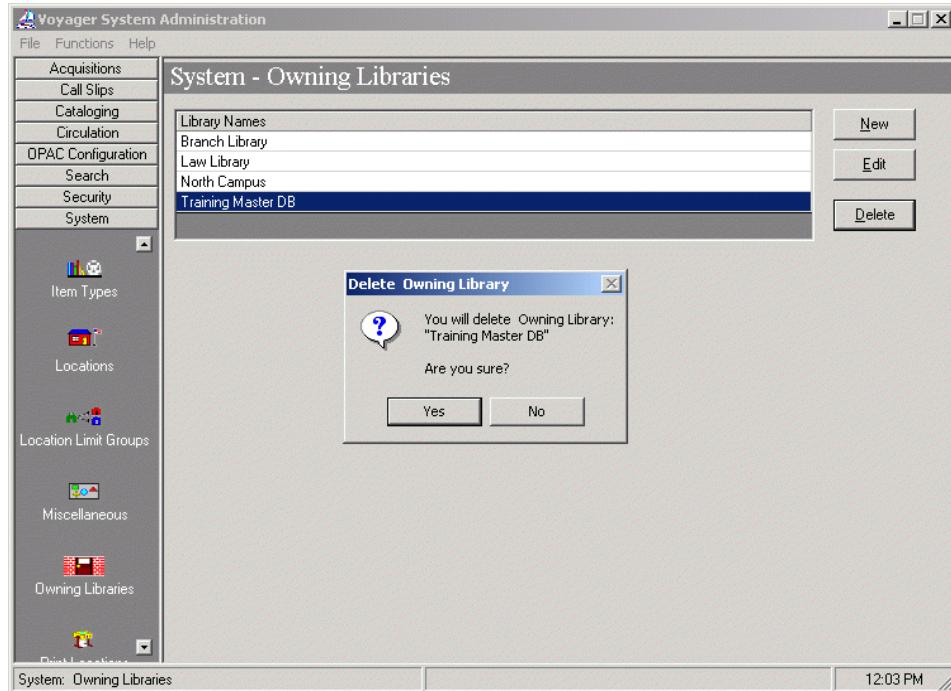
Result: The Voyager **System** options display in the vertical listbar area.

2. Click **Owning Library**.

Result: The **System - Owning Libraries** dialog box opens. See [Figure 10-41](#).

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 10-43](#).



**Figure 10-43. 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

---

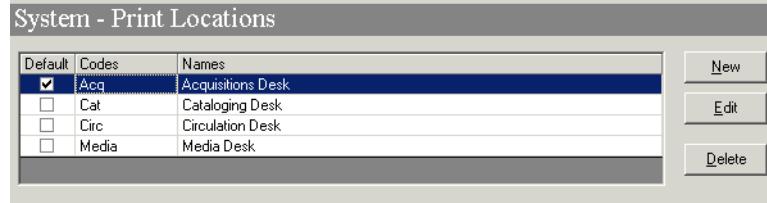
Operators linked to a Master security profile, where the **System-Wide Configuration** check box on the **Profile Values** tab of the **Security - Master Profiles** workspace is checked, are able to access the **System - Print Locations** workspace. See [Master Security Profiles - Creating, Editing, and Deleting](#) on [page 9-23](#).

## 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 10-44](#)). It shows the names of any Print Locations already defined.



---

**Figure 10-44.** System - Print Locations Workspace

After clicking either the **New** or **Edit** buttons, the bottom half of the **System - Print Locations** workspace opens (see [Figure 10-45](#)). In this example, the fields are blank because the **New** button was selected.

---

The screenshot shows a dialog box titled "New Print Location:". It has two text input fields: "Code:" and "Name:", both currently empty. Below these is a section titled "Default Print Location for:" with four checkboxes: "Default", "Cataloging", "Circulation", and "Acquisitions", "Media Scheduling". At the bottom of the dialog are "Save" and "Cancel" buttons.

---

**Figure 10-45.** 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.
<b>Default Print Location for section</b>			
Default	When checked, this indicates that the selected Print Location is the default for all of the Voyager modules.  <b>NOTE:</b> 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.  <b>NOTE:</b> 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

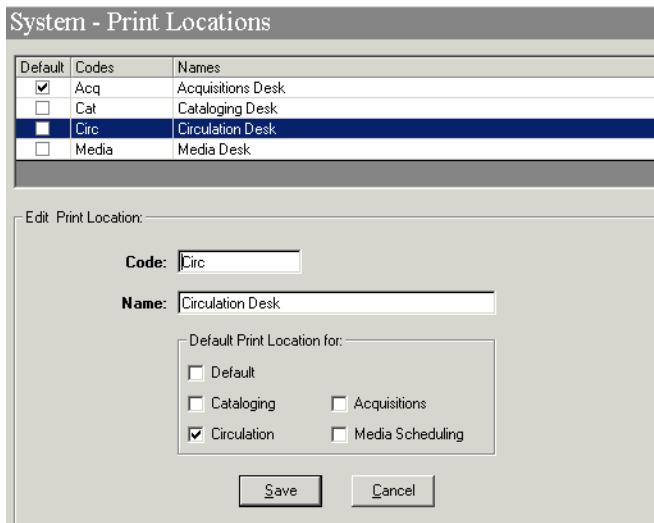
In the System Administration module, sites define default print locations for each module, print locations, and a single default print location.

### 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 10-46](#) shows that the Circulation Desk is the default print location for the Circulation module.



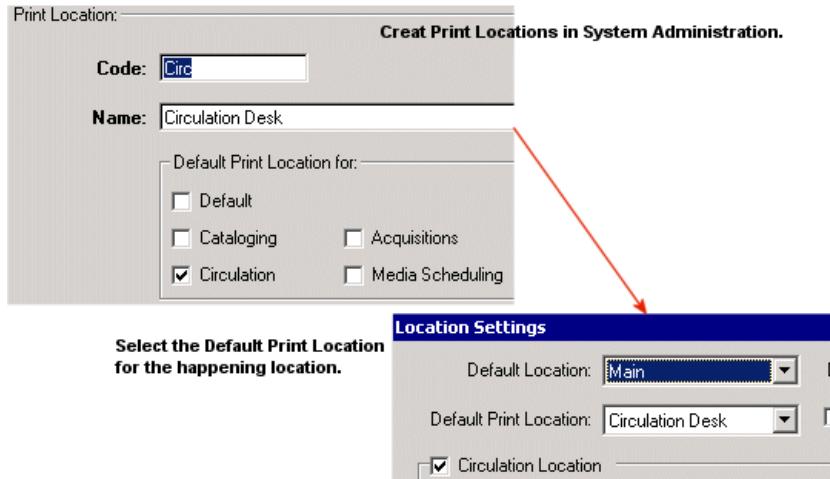
**Figure 10-46.** Circulation Desk is defined as the global print location for Circulation

### 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`.

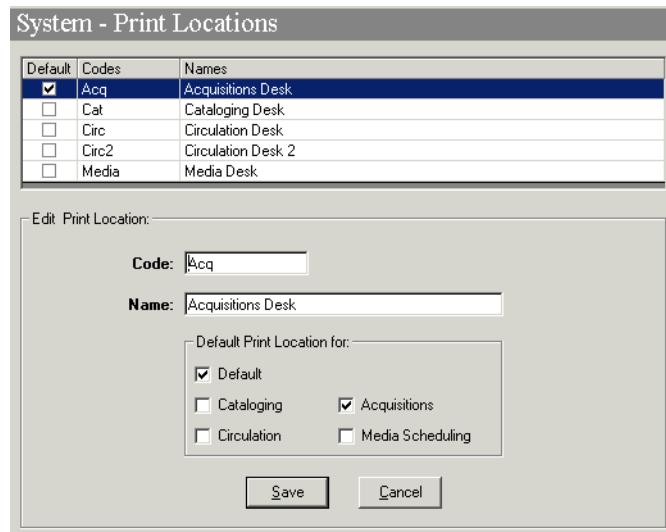
[Figure 10-47](#) shows part of the **System - Print Location** workspace and the **Location Settings** dialog box from the policy definition.



**Figure 10-47. 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 10-48](#) shows the default print location.



**Figure 10-48. 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 10-49](#), 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
<input checked="" type="checkbox"/>	Acq	Acquisitions Desk
<input type="checkbox"/>	Cat	Cataloging Desk
<input type="checkbox"/>	Circ	Circulation Desk
<input checked="" type="checkbox"/>	Circ2	Circulation Desk 2
<input type="checkbox"/>	Media	Media Desk

**Code:** Circ

**Name:** Circulation Desk

Default Print Location for:

Default       Acquisitions  
 Cataloging       Circulation       Media Scheduling

**Code:** Circ2

**Name:** Circulation Desk 2

Default Print Location for:

Default       Acquisitions  
 Cataloging       Circulation       Media Scheduling

---

**Figure 10-49. 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 10-26. 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 2-44](#) for more information.

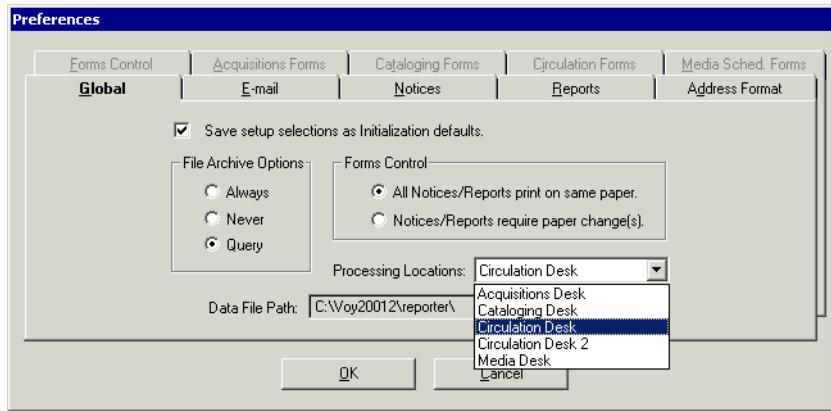
For Cataloging, since all cataloging reports go to the Cataloging Global Printing Location that you selected as the Default Print location, you do not need to select separate print locations in the Cataloging Policy Group.

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 5-54](#) 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 10-50](#)).



**Figure 10-50. 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 10-27. 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 10-28. Deleting a Print Location**

---

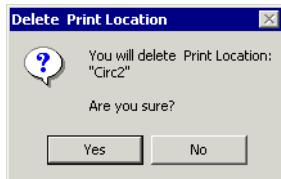
Use the following to delete a Print Location.

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 10-51](#)).



**Figure 10-51. 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.*

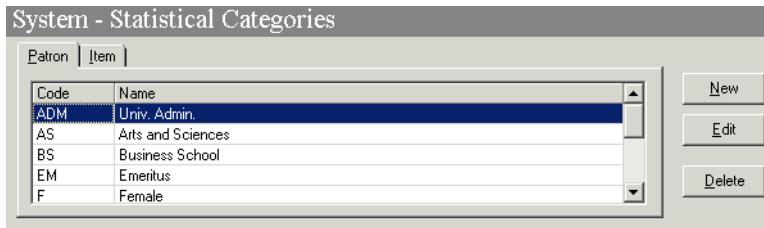
Statistical Categories are created, edited, and deleted in the System Administration module.

## 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 9-23](#).

## Statistical Categories Workspace

The **System - Statistical Categories** workspace contains the **Patron** and **Item** tabs (see [Figure 10-52](#)).



**Figure 10-52.** 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 10-53](#)). It opens to the **Patron** tab and shows the codes and names of any patron statistical categories already defined.

System - Statistical Categories	
Patron   Item	
Code	Name
ADM	Univ. Admin.
AS	Arts and Sciences
BS	Business School
EM	Emeritus
F	Female

**Figure 10-53.** 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 10-54](#)). In this example, the fields are blank because the **New** button was selected.

New Patron Statistical Category:

Code:	<input type="text"/>
Name:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

**Figure 10-54.** 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.  For example: Library Staff University Administration  Statistical Categories will display in alphabetical lists to operators who can assign them.	Yes	Alphanumeric 3 characters.
[Patron Statistical Category] Name	Patron Statistical Category name.  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 10-55](#) shows the **Item** tab.

System - Statistical Categories	
Patron	Item
Code	Name
ART	Art
AST	Astronomy
BUS	Business
CHM	Chemistry
COM	Communications

**Figure 10-55.** 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 10-56](#)). In this example, the field is blank because the **New** button was selected.

New Item Statistical Category:

Code:	<input type="text"/>
Name:	<input type="text"/>
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

**Figure 10-56.** 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 10-29. 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 10-30. 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 10-31. Deleting a Patron Group Statistical Category**

---

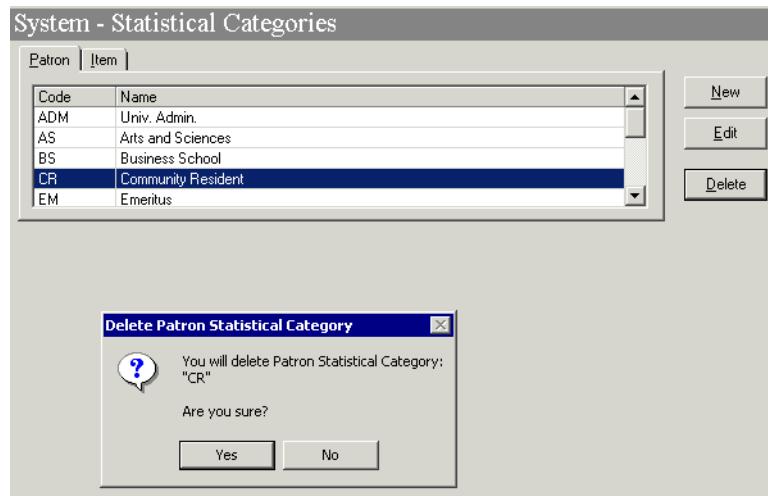
Use the following to delete a Patron Group Statistical Category.

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 10-57](#)).



**Figure 10-57. 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 10-32. 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 10-33. 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 10-34. Deleting an Item Statistical Category**

---

Use the following to delete an Item Statistical Category.

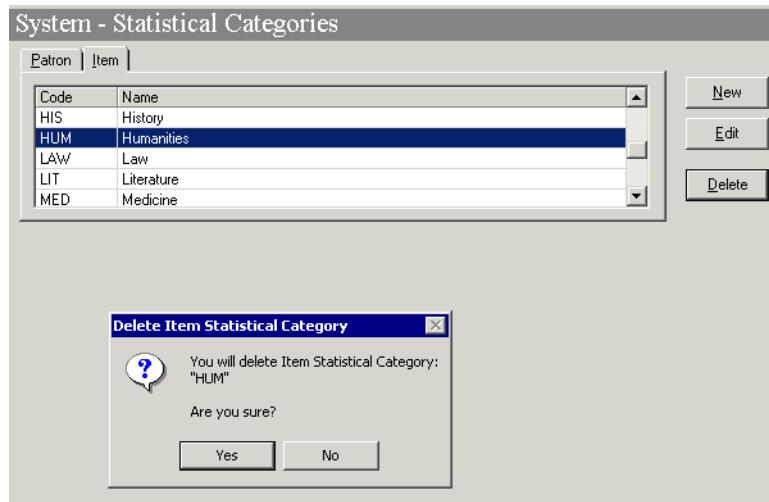
1. Access the System Administration module's **System -Statistical Categories** workspace.
  - a. Click **System** in the listbar.
  - b. Click the **Statistical Categories** button in the System listbar.

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 10-58](#)).

---



---

**Figure 10-58. 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.

---

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**Endeavor Information Systems, Inc.**  
See notice on first page

**10-106**

June 2006

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### 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 Configuration 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. WebVoyáge headings searches can be made available in staff modules. Only the WebVoyáge headings searches are available in the WebVoyáge 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 WebVoyáge 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

---

## **WebVoyáge and Staff Name Heading Indexes- Bibliographic fields**

---

**NOTE:**

Up to t = up to, but not including the first subfield t.

**Table A-1. WebVoyáge and Staff Name Heading Indexes-Bibliographic fields**

Field	Subfields	Type	Rule
100	adq	personal	
110	abcdgkn	corporate	
111	abcdefgklnpq	meeting	
400	adkptv	personal	Up to t
410	abcdefgkl	corporate	Up to t
411	abcdegknq	meeting	Up to t
700	adqt	personal	Up to t
710	abcdefgkl	corporate	Up to t
711	acdefgkl	meeting	Up to t
800	adkqptv	personal	Up to t
810	abcdefgklptv	corporate	Up to t
811	abcdefgklptv	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	abcdkq	personal
X10	abcdgkn	corporate
X11	abcdegknq	meeting
X51	ab	corporate

## WebVoyage and Staff Name/Title Heading Indexes- Bibliographic fields

**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 adfgklmnopr, 243 adfgklmnopr, 245 afgknps. 1XX/245 will never be validated.
- 130 will be combined only with 245 afgknps.

**Table A-3. WebVoyage and Staff Name/Title Heading Indexes-Bibliographic fields**

Field	Name Subfields	Rule	Title Subfields	Type
100	abcdkq			personal
110	abcdgkn		c	corporate
111	abcdegknq			meeting
130	adfgklmnoprs			uniform title
410	abcdgkn	Up to t	dfgklnpt	corporate
411	abcdegknq	Up to t	dfgklnpt	meeting
700	abcdkq	Up to t	fgklmnoprt	personal
710	abcdgkn	Up to t	dfgklmnopr st	corporate
711	abcdegknq	Up to t	fgklnpst	meeting
800	abcdkq	Up to t	fgklmnoprt	personal
810	abcdgkn	Up to t	dfgklmnopr st	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 Subfeilds	Type
X00	abcdkq	Up to t	fgklmnoprt	personal
X10	abcdgkn	Up to t	dfgklmnoprst	corporate
X11	abcdegknq	Up to t	fgklnpst	meeting

---

## WebVoyage and Staff Subject Heading Indexes-Bibliographic fields

---

**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. WebVoyage and Staff Subject Heading Indexes-Bibliographic fields**

Field	Lead Subfields	Title Subfields	Subdivision s
600	abcdkq	fgklmnoprt	vxyz
610	abcdgkn	dfgklmnoprst	vxyz
611	abcdegknq	fgklnpst	vxyz
630	adfgklmnoprs		vxyz
650	abcd		vxyz
651	ab		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	abcdkq	fgklmnoprt	vxyz
X10	abcdgkn	dfgklmnoprst	vxyz
X11	abcdegknq	fglnpst	vxyz
X30	adfgklmnoprs		vxyz
X50	abcd		vxyz
X51			vxyz

---

## **WebVoyage and Staff Title Heading Indexes**

---

**Table A-7. WebVoyage and Staff Title Heading Indexes**

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. Modifications to the searches available to your staff and patrons can be made through the Search Configuration section of the System Administration module.

EISI provides composite indexes for topically related searching (for example, Author, Title, Subject) 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-10](#) 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 (Page 1 of 5)**

Search Name	Search Code	Indexed Fields
Keyword Anywhere	GKEY	All 010-9xx fields/subfields
Journal Title	JKEY	130  adfklmnoprs 210  ab 222  ab 240  adfklmnoprs 243  adfklmnoprs 245  abh 246  abfnp 247  abfnp 400  knptv 410  knptv 411  knptv 440  anpv 490  av 700  knpt 710  knpt 711  knpt 730  adfklmnoprs 740  anp 773  abst 776  abst 780  abst 785  abst 800  knptv 810  knptv 811  knptv 830  anpv
Author Name	NKEY	100  acdq 110  abcdefgkl 111  abcdefgklnpq 400  acd 410  abcdefgkl 411  abcdefgkl 700  aqd 710  abcdefgkl 711  abcdefgkl 800  acdq 810  abcdefgkl 811  abcdefgkl

**Table A-12. Keyword Index Components (Page 2 of 5)**

<b>Search Name</b>	<b>Search Code</b>	<b>Indexed Fields</b>
Series	SERI	400  acdknptv 410  abcdefgklnptv 411  acdefgklnptv 440  anpv 490  av 760  abst 800  acdknptv 810  abcdefgklnptv 811  acdefgklnptv 830  anpv
Subject	SKEY	600  abcdfgklmnopqrstuvwxyz 610  abcdfgklmnopqrstuvwxyz 611  abcdefgklnpqstuvwxyz 630  adfgklnopqrstuvwxyz 650  abcdvxyz 651  abvxyz 653  a 655  abcvxyz 690  abvxyz 691  abvxyz

**Table A-12. Keyword Index Components (Page 3 of 5)**

Search Name	Search Code	Indexed Fields
Title	TKEY	130  adfklmnoprs 210  ab 222  ab 240  adfklmnoprs 243  adfklmnoprs 245  abh 246  abfnp 247  abfnp 400  knptv 410  knptv 411  knptv 440  anpv 490  av 700  knpt 710  knpt 711  knpt 730  adfklmnoprs 740  anp 773  abst 776  abst 780  abst 785  abst 800  knptv 810  knptv 811  knptv 830  anpv
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  adfklmnoprs
Title, Key	210A	210  ab 222  ab
Uniform Title	240A	240  adfklmnoprs 243  adfklmnoprs
Title Proper	245A	245  abh

**Table A-12. Keyword Index Components (Page 4 of 5)**

<b>Search Name</b>	<b>Search Code</b>	<b>Indexed Fields</b>
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  abcdefghijklmнопqrstuvwxyz
Subject: Corporate Name	610A	610  abcdefghijklmнопqrstuvwxyz
Subject: Conf/Mtg Name	611A	611  abcdefghijklmнопqrstuvwxyz
Subject: Uniform Title	630A	630  адfgklmnopqrstuvwxyz
Subject: Topical	650A	650  abcdxyz
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 (Page 5 of 5)**

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  adfklmnoprs
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  abcdefgkl
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 to customers 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 WebVoyage 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. Modifications to the searches available to your staff and patrons can be made through the Search Configuration 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. 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. You can make these searches available or not in the staff modules. Authority Indexes are not available in the WebVoyage module. These indexes cannot be deleted or otherwise changed.

**Table A-15. Left-Anchored Authority Indexes**

Voyager Search Code	Search Name	Indexed Fields	Indexed Subfields
A10A	Auth LCCN	010	a
A10Z	Auth LCCN: Canceled	010	z
A35A	Auth System Number	035	a
A35Z	Auth System Number: Canceled	035	z

### **Left-Anchored Call Number Indexes**

---

Only the Search Name may be changed. You can make these searches available or not in the staff modules. They are automatically available in WebVoyage. These indexes cannot be deleted or otherwise changed.

**Table A-16. Left-Anchored Call Number Indexes**

Voyager Search Code	Search Name	Indexed Fields	Indicator 1 Value
MCOD	MfhC CODOC Classification	852  hi	c

**Table A-16. Left-Anchored Call Number Indexes**

Voyager Search Code	Search Name	Indexed Fields	Indicator 1 Value
MDEW	Mfhd Dewey Classification	852  hi	1
MNLM	Mfhd NLM Classification	852  hi	2
MOTH	Mfhd Other Classification	852  hi	8
MSUD	Mfhd SUDOC Classification	852  hi	3
CALL	Mfhd Call Number	852  hi <sup>1</sup>	all
MNAL	Mfhd NAL Classification	852  hi	k
MLC#	LC Classification Number	852  hi	02

1 This is used for the call number search entered from the Headings search tab in the WebVoyáge module. It is an indication to the system to normalize the search statement first to see what kind of call number has been entered.

### **Left-Anchored Composite Indexes**

Voyager distributes the following as composite indexes. You may delete or change any of these. Any of the composite indexes may be made available for searching in staff modules.

A site may choose to delete any single-field index from TALL or JALL but it cannot delete TALL or JALL. See WebVoyáge configuration for details on using TALL and JALL.

**Table A-17. Left-Anchored Composite Indexes (Page 1 of 2)**

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)

---

**Table A-17. Left-Anchored Composite Indexes (Page 2 of 2)**

Voyager Search Code	Search Name	Indexes Included
ISSL	ISSN Numbers	022A (ISSN) 022Y (Incorrect ISSN) 022Z (Canceled/Invalid ISSN)
STRN	STRN Numbers	027A (Std Tech Report No.) 027Z (Canc/Invalid STRN)
PUBN	Publisher Numbers	028A (Publisher Number) 028B (Publisher Number Source) 028D (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	019A (Canc/Invalid OCLC Number) 035A (System Control Number) 035Z (Canc/Invalid SCN)  <b>NOTE:</b> See the <i>Voyager Technical User's Guide</i> for more information regarding the 035 field.
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, 651H, 654H, 655H

**Name Left-Anchored Indexes****Table A-18. Name Left-Anchored Indexes**

<b>Voyager Search Code</b>	<b>Search Name</b>	<b>Indexed Field</b>	<b>Indexed Subfields</b>
100H	Personal Name	100	abcdefghijklnpqstu
110H	Corporate Name	110	abcdefghijklnpqstu
111H	Conference	111	abcdefghijklnpqstu
400H	Personal Name Series	400	abcdefghijklnpqtv
410H	Corporate Name Series	410	abcdefghijklnpqtv
411H	Conference Series	411	abcdefghijklnpqtv
700H	Personal Name AE	700	abcdefghijklmnoprstu
710H	Corporate Name AE	710	abcdefghijklmnoprstu
711H	Conference AE	711	abcdefghijklnpqstu
800H	Personal Name Series AE	800	abcdefghijklmnoprstu
810H	Corporate Name Series AE	810	abcdefghijklmnoprstu
811H	Conference Series AE	811	abcdefghijklnpqstu
NALL	Names	(composite) <sup>1</sup>	

1 NALL is a composite. (See the section "Left-Anchored Composite Indexes" on [A-17](#) for inclusive indexes.)

**Subject Left Anchored Indexes****Table A-19. Subject Left Anchored Indexes (Page 1 of 2)**

<b>Voyager Search Code</b>	<b>Search Name</b>	<b>Indexed Field</b>	<b>Indexed Subfields</b>
6500	Subject: LCSH	650	0 abcdvxyz
6501	Subject: Children's LCSH		1 abcdvxyz

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**Table A-19. Subject Left Anchored Indexes (Page 2 of 2)**

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields
6502	Subject: MESH	650	2 abcdvxyz
6503	Subject: NAL	650	3 abcdvxyz
6504	Subject: Unspecified	650	4 abcdvxyz
6505	Canadian English	650	5 abcdvxyz
6506	Subject: Canadian French	650	6 abcdvxyz
6507	Subject: Other	650	7 abcdvxyz
600H	Subject: Name	600	abcdefghijklmnpqrstuvwxyz
610H	Subject: Corporate	610	abcdefghijklmnpqrstuvwxyz
611H	Subject: Conference	611	abcdefghijklnpqrstuvwxyz
630H	Subject: Title	630	abcdefghijklmnoprsvxyz
651H	Subject: Geographic	651	ab vxyz
654H	Subject: Faceted	654	ab vxyz
655H	Subject: Genre/Form	655	ab vxyz
SALL	Subject	(composite) <sup>1</sup>	

1 SALL is a composite. (See the section "Left-Anchored Composite Indexes" on [A-17](#) for inclusive indexes.)

### **Remaining Left-Anchored Indexes**

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This list comprises the remaining searchable left-anchored indexes. Any of these indexes can be made available for searching in the staff modules.

**Table A-20. Remaining Left-Anchored Indexes**

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields
1300	Uniform Title ME	130	adfhijklmnpqrst
1301	Uniform Title ME: Title	130	alnps
1302	Uniform Title ME: Name of Pt	130	p
4000	Series Title: Personal	400	t

**Table A-20. Remaining Left-Anchored Indexes**

<b>Voyager Search Code</b>	<b>Search Name</b>	<b>Indexed Field</b>	<b>Indexed Subfields</b>
4100	Series Title: Corporate	410	t
4110	Series Title: Conference	411	t
4400	Series Title: Title AE	440	anpvx
440A	Series Title: Title only (440a)	440	a
2220	Title, Key	222	ab
2100	Title, Key (Abbreviated)	210	ab
2110	Title, Shortened	211	ab
2120	Title, Variant Access	212	a
2140	Title, Augmented	214	a
2400	Uniform Title	240	adfgijklmnoprss
2401	Uniform Title: Title	240	alnps
2402	Uniform Title: Name of Part	240	p
2450	Title Statement (long)	245	abfghknps
2451	Title Statement: Title (brief)	245	ab
2452	Title Statement: Medium	245	abh
2460	Title, Varying Form	246	abfghnp
2470	Title, Former	247	abfghnpx
7300	Uniform Title AE	730	adfgijklmnoprstx
7301	Uniform Title AE: Title	730	alnps
7302	Uniform Title AE: Name of Pt	730	p
7400	Uncont. Title AE	740	ahnp
7401	Uncont. Title AE: Name of Part	740	p
7600	Main Series Entry	760	t
7620	Subseries Entry	762	t
7670	Translation (767)	767	abst
7720	Parent Record Entry	772	a
7721	Parent Record Entry: Title	772	t
7730	Host Item Entry	773	a

---

**Table A-20. Remaining Left-Anchored Indexes**

Voyager Search Code	Search Name	Indexed Field	Indexed Subfields
7731	Host Item Entry: Title	773	t
7800	Preceding Title (780t)	780	t
7850	Succeeding Title (785t)	785	t
8000	Series AE: Personal	800	t
8100	Series AE: Corporate	810	t
8110	Series AE: Conference	811	t
8300	Series AE: Uniform Title	830	adfgijklmnoprstv
8301	Series AE: UT: Title	830	alnps
8302	Series AE: UT: Name of Part	830	p

## Choices for Search Results

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**Table A-21. Choices for Search Results (Page 1 of 3)**

bib_text field name	Length <sup>1</sup>	WebVoyáge	Initial WebVoyáge 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

**Table A-21. Choices for Search Results (Page 2 of 3)**

<b>bib_text field name</b>	<b>Length<sup>1</sup></b>	<b>WebVoyáge</b>	<b>Initial WebVoyáge display name</b>	<b>MARC fields</b>
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
publisher	150	yes	Publisher	260 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
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
pub_dates_combine d	9	yes	Dates	008/07-10 'hyphen' 008/11-14
publisher_date	25	yes	Publisher Date	260 c
record_status	1	no		Leader/05

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**Table A-21. Choices for Search Results (Page 3 of 3)**

bib_text field name	Length <sup>1</sup>	WebVoyage	Initial WebVoyage display name	MARC fields
encoding_level	1	no		Leader/17
descrip_form	1	no		Leader/18
date_type_status	1	yes	Type of Date/ Publication Status <sup>c</sup>	008/06
map_math_data	255	yes	Cartographic Mathematical Data	255a
map_projection	2	yes	Map Projection <sup>c</sup>	008/22-23
place_code	3	yes	Publication Place Code <sup>c</sup>	008/15-17
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). Actual number of characters displayed 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, making it unlikely that a 100-character element, for example, would be displayed in full.

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### Overview

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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.

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## **Endeavor eZconnect: Z39.50 and Simultaneous Searching Project**

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In response to the need for an easier way to manage your Z39.50 resources via Simultaneous Searching, Endeavor has created the Z39.50/Simultaneous search project, eZconnect.

Through this project, a list of Z39.50 attributes is available for certified databases (including other Library Automation Vendors) on SupportWeb. For a current list of databases, go to **SupportWeb>Products>Endeavor eZconnect: Z39.50 and Simultaneous Searching Project**, and see the **Certified Databases** section.

### **Attributes Supported For Connection From Voyager Clients To Z39.50 Databases**

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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 4)**

Value	Use
1	Personal name
2	Corporate name
3	Conference name
4	Title
5	Title Series
6	Title Uniform
7	ISBN
8	ISSN
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

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**Table B-1. Standard Z39.50 Bibliographic Use Attributes (Page 2 of 4)**

<b>Value</b>	<b>Use</b>
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
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

**Table B-1. Standard Z39.50 Bibliographic Use Attributes (Page 3 of 4)**

<b>Value</b>	<b>Use</b>
56	Code-institution
57	Name and title
58	Name geographic
59	Place publication
60	CODEN
61	Microform generation
62	Abstract
63	Note
1000	Author-title
1001	Record type
1002	Name
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

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**Table B-1. Standard Z39.50 Bibliographic Use Attributes (Page 4 of 4)**

Value	Use
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
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.

**Table B-2. Relation Attributes (Page 2 of 2)**

<b>Relation</b>	<b>Value</b>	<b>Definition</b>
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.
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: <ul style="list-style-type: none"> <li>• The target ignores the supplied term.</li> <li>• If the use attribute is any or anywhere, then all records are to be selected.</li> <li>• 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.</li> </ul>

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## 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 3)**

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.

**Table B-4. Structure Attributes (Page 2 of 3)**

<b>Structure</b>	<b>Value</b>	<b>Definition</b>
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.
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.

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**Table B-4. Structure Attributes (Page 3 of 3)**

Structure	Value	Definition
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.

**Table B-6. Completeness Attribute Values**

Completeness	Value	Definition
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 (Page 1 of 2)**

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.

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**Table B-7. Truncation Attribute Values (Page 2 of 2)**

Truncation	Value	Structure Attribute	Definition
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

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 2)**

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
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

**Table B-8. Supported Voyager Incoming Attributes (Page 2 of 2)**

Use Attribute	Search Type	Position	Truncation	Relation	Structure	Completeness
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	1	1
1018	Publisher:Name	3	1,100	3	1	1
1035	Keyword Anywhere	3	1,100	3	1	1

### Introduction

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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

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 4-39](#) 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 4-39](#) 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.

## **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. 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 [12](#) on page [4-51](#) 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 creates one order to which line items are added. System flexibility allows for more than one type of line item to be added to a single order. As a result, one purchase order may have approval, standing order, and subscription line item types on the same purchase order.

Each purchase order created through this process has a status of Pending.

As a practical matter for manageability, you may want to limit the number of line items per order during Bulk Import. One option is to manage the content/size of the imported file. You may want to discuss options with the vendor(s) providing your source file(s).

Another option is to use Bulk Import parameters to specify a range of records or a single record to process. See the *Voyager Technical User's Guide* for more details regarding Bulk Import parameters.

---

### 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.  <b>NOTE:</b> 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.  <b>NOTE:</b> 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 <a href="#">ISB3 Left-Anchored Indexing / Searching</a> on <a href="#">page D-3</a> and <a href="#">Deduplication</a> on <a href="#">page D-3</a> 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 020\$\sharp\$a 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, Endeavor may consider eliminating this procedure in favor of storing the 13-digit ISBN in the LIN segment.

If there is no 020\$\sharp\$a found in the MARC record, Voyager looks for a value in the 024 3\_ \$\sharp\$a that begins with 978 or 979 and places it in the LIN segment qualified as an EAN. Only the first 024 3\_ \$\sharp\$a 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 020\$\sharp\$a and a 13-digit ISBN (EAN) in the 024\$\sharp\$a. Voyager treats the 020\$\sharp\$a and the 024\$\sharp\$a 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\$<sub>a</sub> when the operator chooses the ISBN as the standard number to print.

---

[REDACTED]

**Endeavor Information Systems, Inc.**  
See notice on first page

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