

Work Request Online (WRO) Form and Purpose

Brief description of each WRO form and what information is needed to fill it out.

Work Request Form and Purpose	User Options
<p>Notes on the options below:</p> <p><input type="text"/> Some sort of text is to be entered.</p> <p><input type="radio"/> Radio button indicates that just one choice is available out of several .</p> <p><input type="checkbox"/> Check box indicates one or more options are available out of several.</p>	
<p>SFX UNIX File Manager Access</p>	<p>Three boxes to check to confirm that the account user understands the rights and responsibilities of using the SFX UNIX File Manager program.</p>
<p>Voyager Acquisitions 1 Order Claim/Cancel Processing</p> <p>Note: includes all Acquisitions Happening locations as defined in your library's System Administration "Acquisitions Policy Definitions".</p> <p>Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p><input type="radio"/> Run this job just once on this date: <input type="text"/></p> <p><input type="radio"/> Run this job on the following schedule: <input type="text"/></p> <p><input type="radio"/> Stop running this job on: <input type="text"/></p>
<p>Voyager Acquisitions 2 Open Orders Report</p> <p>Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p>Acquisitions Happening Locations <input type="text"/></p> <p>Please note: these are case sensitive.</p> <p>Ledgers: <input type="text"/></p> <p><input type="radio"/> Run this job just once on this date: <input type="text"/></p> <p><input type="radio"/> Run this job on the following schedule: <input type="text"/></p> <p><input type="radio"/> Stop running this job on: <input type="text"/></p> <p>Choose format:</p> <p><input type="radio"/> Send to <i>Reporter</i> for local printing</p> <p><input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>
<p>Voyager Acquisitions 3 Fund Snapshot Report</p> <p>Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p>Fiscal period(s): <input type="text"/></p> <p><input type="radio"/> Run this job just once on this date: <input type="text"/></p> <p><input type="radio"/> Run this job on the following schedule: <input type="text"/></p> <p><input type="radio"/> Stop running this job on: <input type="text"/></p>
<p>Voyager Acquisitions 5 Fix Exchange Rates</p> <p>Documentation may be found in the <i>Voyager Technical User's Guide</i>.</p> <p>NOTE: This job is not reversible. Once run, the commitments are adjusted permanently.</p>	<p>Fix just these Currency CODES (as defined in your library's Acquisitions System)</p> <p><input type="text"/></p> <p>Fix just these Vendor CODES (as defined in your library's Acquisitions System)</p> <p><input type="text"/></p> <p>Fix just these Order Types: <input type="text"/></p> <p><input type="radio"/> Run this job just once on this date: <input type="text"/></p> <p><input type="radio"/> Run this job on the following schedule: <input type="text"/></p> <p><input type="radio"/> Stop running this job on: <input type="text"/></p>
<p>Voyager Ad Hoc Customized Report</p>	<p>Which records should be in the report? Examples: 1) Count items with AV item types, by location. 2) Exclude items in Special Collections and items in reserve locations.</p> <p>If possible, please provide the ID numbers for some records that should be included in the report.</p> <p>List the fields from the above records that should be in this report.</p>

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	Enter a date or range of dates to be included in this report. Which fields (if any) should be used to sort this report. Additional specifications:
<p>Voyager Bulk Import</p>	Name of the bulk import data file <input type="text"/> Bulk import rule code (case sensitive) <input type="text"/> Should there be an "ok to export" flag on the bibliographic record? <input type="radio"/> Yes <input type="radio"/> No Is this a one-time or a recurring load? <input type="radio"/> One-time load <input type="radio"/> Recurring load
<p>Voyager Bursar Transfer</p> <p>See the Voyager Technical User's Guide for a complete description of the Bursar Transfer program.</p> <p>CARLI will run this in test mode (not changing online data) until final approval to run in "live" mode is received from the library.</p> <p>The program must be run when the library is closed or Circ Desk activity is very low.</p> <p>The Bursar Transfer program creates 3 files: an output file, an audit log, and an error file. Your institution will have to create the batch program that transfers the data in the output file to your institution's accounting department(s).</p>	Location Code(s) to be processed: <input type="text"/> Patron Group Code(s) to be processed: <input type="text"/> Choose transfer method: <input type="radio"/> Transfer Total Patron Balances <input type="radio"/> Transfer Itemized Patron Fines/Fees <input type="radio"/> Run this job just once on this date: <input type="text"/> <input type="radio"/> Run this job on the following schedule: <input type="text"/> <input type="radio"/> Stop running this job on: <input type="text"/> Optional: Minimum Fine/Fee Amount (The minimum amount than an individual fine/fee should be in order to transfer; in whole numbers) <input type="text"/> Interval for Transfer (The number of days after the fine create date when the fine should be transferred) <input type="text"/>
<p>Voyager Cataloging 1 Unauthorized Subject Headings</p> <p>Generates a report of subject headings added to the local database during the date range that do not have a corresponding authority record. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report). See also the I-Share specific document at http://www.carli.illinois.edu/mem-prod/I-Share/secure/cat/voy_cat_reports.pdf</p>	Start date (YYYY-MM-DD) <input type="text"/> End date (YYYY-MM-DD) <input type="text"/> Choose format: <input type="radio"/> Send to <i>Reporter</i> for local printing <input type="radio"/> Place in my library's directory on the reports server for local manipulation
<p>Voyager Cataloging 11 & 12 Voyager Cataloging 13</p> <p>Process Global Heading Change Queue (steps 1 & 2)</p> <p>Process Global Heading Change Fields (step 3)</p> <p>Cataloging 11 prepares global headings changes by finding all of the possible headings to be changed. Cataloging 12 prepares the preview of all fields in the bibliographic and authority records to be changed. Cataloging 13 Updates the actual bibliographic and authority records if the header was marked for processing in cataloging. NOTE: Cataloging jobs 11, 12, and 13 MUST BE RUN IN THAT ORDER for a specific heading change to be complete.</p>	Operator Name (recommended) <input type="text"/> Location (recommended) <input type="text"/> There are 4 choices for running these reports: <input type="radio"/> 1. Run the 3 cataloging jobs just one time. Date for running cataloging 11 and 12: <input type="text"/> Date for running cataloging 13: <input type="text"/> Run cataloging 13: Before 5:00 a.m. or After 7:00 p.m. <input type="radio"/> 2. Run the 3 cataloging jobs on a WEEKLY schedule. Run cataloging 11 and 12 every: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday [select one] Run cataloging 12 every: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday Saturday [select one] <input type="radio"/> 3. Run the 3 cataloging jobs on a MONTHLY schedule. Run cataloging 11 and 12 on this date every month: <input type="text"/> Run cataloging 13 on this date every month: <input type="text"/> Run cataloging 13: <input type="radio"/> Before 5:00 a.m. or <input type="radio"/> After 7:00 p.m. <input type="radio"/> 4. Stop running these 3 reports on a recurring schedule.
<p>Voyager Cataloging 2 Unauthorized Name Headings</p> <p>Generates a report of name headings added to the local</p>	Start date (YYYY-MM-DD) <input type="text"/> End date (YYYY-MM-DD) <input type="text"/>

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<p>database during the date range that do not have a corresponding authority record. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report). See also the I-Share specific document at http://www.carli.illinois.edu/mem-prod/I-Share/secure/cat/voy_cat_reports.pdf</p>	<p>Choose format: <input type="radio"/> Send to <i>Reporter</i> for local printing <input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>
<p>Voyager Cataloging 3 Unauthorized Title Headings</p> <p>Generates a report of title headings added to the local database during the date range that do not have a corresponding authority record. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report). See also the I-Share specific document at http://www.carli.illinois.edu/mem-prod/I-Share/secure/cat/voy_cat_reports.pdf</p>	<p>Start date (YYYY-MM-DD) <input type="text"/> End date (YYYY-MM-DD) <input type="text"/></p> <p>Choose format: <input type="radio"/> Send to <i>Reporter</i> for local printing <input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>
<p>Voyager Cataloging 4 Unauthorized Name/Title Headings</p> <p>Generates a report of name/title headings added to the local database during the date range that do not have a corresponding authority record. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report). See also the I-Share specific document at http://www.carli.illinois.edu/mem-prod/I-Share/secure/cat/voy_cat_reports.pdf</p>	<p>Start date (YYYY-MM-DD) <input type="text"/> End date (YYYY-MM-DD) <input type="text"/></p> <p>Choose format: <input type="radio"/> Send to <i>Reporter</i> for local printing <input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>
<p>Voyager Cataloging 5 Duplicate Authorized Headings</p> <p>Generates a report of all types of headings in the local database that are authorized by multiple authority records. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report). See also the I-Share specific document at http://www.carli.illinois.edu/mem-prod/I-Share/secure/cat/voy_cat_reports.pdf</p>	<p>Start date (YYYY-MM-DD) <input type="text"/> End date (YYYY-MM-DD) <input type="text"/></p> <p>Choose format: <input type="radio"/> Send to <i>Reporter</i> for local printing <input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>
<p>Voyager Cataloging 6 See Refs with Linked Bib Records Report</p> <p>Generates a report of all types of 4XX headings in the local database that have bibliographic records linked to them. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report). See also the I-Share specific document at http://www.carli.illinois.edu/mem-prod/I-Share/secure/cat/voy_cat_reports.pdf</p>	<p>Begin with what letter(s)? <input type="text"/> End with what letter(s)? <input type="text"/> Note: digits are considered to be before "a" in the alphabet.</p> <p>Choose format: <input type="radio"/> Send to <i>Reporter</i> for local printing <input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>
<p>Voyager Cataloging 7 See Refs With Linked Bib Records Report</p> <p>Generates a report of all types of 4XX headings in the local database that match the 1XX field of other authority records. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report). See also the I-Share specific</p>	<p>Begin with what letter(s)? <input type="text"/> End with what letter(s)? <input type="text"/> Note: digits are considered to be before "a" in the alphabet.</p> <p>Choose format: <input type="radio"/> Send to <i>Reporter</i> for local printing <input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>

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document at http://www.carli.illinois.edu/mem-prod/I-Share/secure/cat/voy_cat_reports.pdf	
<p>Voyager Cataloging 8 See Also Ref without Corresponding Authority Record Report</p> <p>Generates a report of all types of authority records in the local database that have a 5XX field that does not match the 1XX field of any authority records. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report). See also the I-Share specific document at http://www.carli.illinois.edu/mem-prod/I-Share/secure/cat/voy_cat_reports.pdf</p>	<p>Begin with what letter(s)? <input type="text"/></p> <p>End with what letter(s)? <input type="text"/></p> <p>Note: digits are considered to be before "a" in the alphabet.</p> <p>Choose format:</p> <p><input type="radio"/> Send to <i>Reporter</i> for local printing</p> <p><input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>
<p>Voyager Circulation 14 Fine/Fee Statements</p> <p>This job produces fine/fee statements which include all fines/fees owed. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p><input type="radio"/> Run this job just once on this date: <input type="text"/></p> <p><input type="radio"/> Run this job on the following schedule: <input type="text"/></p> <p><input type="radio"/> Stop running this job on: <input type="text"/></p>
<p>Voyager Circulation 20 Reserved Items Active Report</p> <p>This report lists all items which should be on reserve. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p>Start date (YYYY-MM-DD) <input type="text"/></p> <p>End date (YYYY-MM-DD) <input type="text"/></p>
<p>Voyager Circulation 21 Reserved items Expired Report</p> <p>This report lists all items which should be removed from reserve. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p>Start date (YYYY-MM-DD) <input type="text"/></p> <p>End date (YYYY-MM-DD) <input type="text"/></p>
<p>Voyager Circulation 22 Missing In Transit Report</p> <p>This job lists all items that have not been received at the new location by the end of the time interval. It includes the source location, title, call number, item ID, target location, and transit date. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p><input type="radio"/> Run this job just once on this date: <input type="text"/></p> <p><input type="radio"/> Run this job on the following schedule: <input type="text"/></p> <p><input type="radio"/> Stop running this job on: <input type="text"/></p>
<p>Voyager Circulation 23 Transaction Statistics Report</p> <p>This job creates a report that prints to each individual print location, a compilation for each operator at that particular location, including charges, renews, discharges, and fine/fees collected. Request Circ Job 25 if you would rather have all the reports print at your global print location. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p>Start date (YYYY-MM-DD) <input type="text"/></p> <p>End date (YYYY-MM-DD) <input type="text"/></p> <p>Choose format:</p> <p><input type="radio"/> Send to <i>Reporter</i> for local printing</p> <p><input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>

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<p>Voyager Circulation 25 Global Transaction Statistics Report</p> <p>This job creates a report that prints a compilation for each operator at each circ desk at all library locations, including charges, renewals, discharges, and fine/fees collected. Request Circ Job 23 if you would rather have each print location receive its own report. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p>Start date (YYYY-MM-DD) <input type="text"/></p> <p>End date (YYYY-MM-DD) <input type="text"/></p> <p>Choose format:</p> <p><input type="radio"/> Send to <i>Reporter</i> for local printing</p> <p><input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>
<p>Voyager Circulation 28 Automatic Orders for Item Distribution</p> <p>If you are using the item distribution function in the Voyager circulation client, this job will automatically place orders for items of which your stack is running low. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p><input type="radio"/> Run this job just once on this date: <input type="text"/></p> <p><input type="radio"/> Run this job on the following schedule: <input type="text"/></p> <p><input type="radio"/> Stop running this job on: <input type="text"/></p>
<p>Voyager Circulation 30 Accrued Fines and Demerits</p> <p>This job calculates the fines that your patrons would owe if they returned their overdue books today. Voyager will use these hypothetical amounts when it checks fine thresholds. When an item is returned, the actual fine amount will replace the hypothetical amount. Documentation may be found in the <i>Voyager Reporter User's Guide</i> (for processing the reports and samples) and the <i>Voyager Technical User's Guide</i> (for details about the contents of the report).</p>	<p><input type="radio"/> Run this job just once on this date: <input type="text"/></p> <p><input type="radio"/> Run this job on the following schedule: <input type="text"/></p> <p><input type="radio"/> Stop running this job on: <input type="text"/></p>
<p>Voyager Circulation 39 Patron Record Purge</p> <p>I-Share specific documentation on Patron Record Purge is available from http://www.carli.illinois.edu/I-Share/docs/circ/patron-rec-purge.pdf. Endeavor's generic documentation may be found in the <i>Voyager Technical User's Guide</i> (version 6.1 or higher).</p> <p>CARLI Data Services will run this job in test mode (not deleting online data) until approval to run in "live" mode is received from the library.</p>	<p><input type="radio"/> Use Expiration Date in patron record</p> <p><input type="radio"/> Use Purge Date in patron record</p> <p>Delete patron records whose Expiration or Purge date is on or before the following date: <input type="text"/></p>
<p>Voyager EDI</p> <p>Please file this WRO to start the testing and implementation of EDI. See <i>EDI in the I-Share Voyager Acquisitions Environment</i>, http://www.carli.illinois.edu/mem-prod/I-Share/secure/acq/EDIinVoyager.pdf and <i>EDI and EOD Files Diagram</i>, http://www.carli.illinois.edu/mem-prod/I-Share/acq/edi_and_eod_walkthrough.pdf for a complete description of the EDI process in the I-Share environment.</p>	<p>Type of EDI file:</p> <p><input type="checkbox"/> Incoming, e.g., invoices</p> <p><input type="checkbox"/> Outgoing, e.g., orders</p> <p>Primary contact person in your library for EDI:</p> <p>Name: <input type="text"/></p> <p>Phone: <input type="text"/></p> <p>E-Mail: <input type="text"/></p>
<p>Voyager EOD</p> <p>Please file this WRO to start the testing and implementation of EOD. See <i>Getting Started with EOD</i>, http://office.ilcso.illinois.edu/Docs/getstartedeod.pdf and <i>EDI and EOD Files Diagram</i>, http://www.carli.illinois.edu/mem-prod/I-Share/acq/edi_and_eod_walkthrough.pdf for a complete</p>	<p>Bulk import rule CODE to load EOD files: <input type="text"/></p> <p>Should there be an "OK to export" flag on the bibliographic record? <input type="radio"/></p> <p>Yes <input type="radio"/> No</p> <p>Primary contact person in your library for EOD:</p> <p>Name: <input type="text"/></p> <p>Phone: <input type="text"/></p> <p>E-Mail: <input type="text"/></p>

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<p>description of the EOD process in the I-Share environment.</p> <p>Voyager Fiscal Period Close</p> <p>Documentation is available in the <i>Voyager Acquisitions User's Guide</i> and at http://www.carli.illinois.edu/mem-prod/I-Share/secure/acq/FPCstepbystep.pdf.</p>	<p>Date and Time to stop Acquisitions/Serials and perform the Fiscal Period Close: Date: <input type="text"/> Time: <input type="radio"/> before 8 a.m. <input type="radio"/> after 4:00 p.m. Three reports are available as part of the Fiscal Period Close; you may choose any, all, or none of these reports: <input type="checkbox"/> Open Orders (before and after) <input type="checkbox"/> Fund Snapshot (before and after) <input type="checkbox"/> Rollover Status Reports</p> <p>Choose format: <input type="radio"/> Send to <i>Reporter</i> for local printing <input type="radio"/> Place in my library's directory on the reports server for local manipulation</p>
<p>Voyager MyOPAC Reinstatement</p> <p>Documentation about Voyager MyOPAC functions may be found in the <i>Voyager WebVoyager User's Guide</i>.</p>	<p><input type="checkbox"/> Delete all previous contents of the MyOPAC files. (Recommended...) Three functions are available within the MyOPAC service; you may choose to re-enable one, two, or all three in your local catalog: <input type="checkbox"/> Reinstatement the Saved Search Strategies option <input type="checkbox"/> Reinstatement the Saved Titles (also known as MyBookbag option) <input type="checkbox"/> Reinstatement the Search Preferences option Date on which to reinstate the selected option(s): <input type="text"/></p>
<p>Voyager Oracle Account Request</p> <p>IMPORTANT: The CARLI/I-Share Data Privacy Compliance Form must be printed, signed by both a security contact and the account owner, and returned to CARLI System Services as indicated on the form before a new account will be created. The form is at http://www.carli.illinois.edu/I-Share/docs/compli.pdf.</p>	<p>Account Name: <input type="text"/> Account Owner's Name: <input type="text"/> Account Owner's Telephone Number (include area code): <input type="text"/> Account Owner's Email Address: <input type="text"/></p> <p><input type="checkbox"/> Reports Database <input type="checkbox"/> Training Database</p> <p><input type="checkbox"/> DELETE This Account</p>
<p>Voyager Patron Load</p> <p>Click here to see I-Share's "Batch Loading Patron Data into I-Share Voyager Databases" document: http://www.carli.illinois.edu/I-Share/secure/circ/patron_batch_load.pdf</p>	<p>Name of the patron data file <input type="text"/> Which index should be used to detect duplicate records? <input type="radio"/> Social Security Number <input type="radio"/> Institution ID <input type="radio"/> Default Which type of notes are present in the record? <input type="radio"/> General Notes <input type="radio"/> Pop-Up Notes <input type="radio"/> No Notes How should existing notes be overlaid from the incoming record? <input type="radio"/> Add new notes to the old ones <input type="radio"/> Replace old notes with new ones <input type="radio"/> Ignore new notes Should extended notes processing be done? <input type="radio"/> Yes <input type="radio"/> No</p>
<p>WebVoyage Staging Request</p> <p>IMPORTANT: This form is for use by libraries that have chosen to customize WebVoyage themselves, rather than use the I-Share default look-and-feel for local catalogs. Individuals who have received training in customizing WebVoyage and who would like to have an account on the I-Share WebVoyage development server need to print, complete, and mail or fax the "CARLI/I-Share Data Privacy Compliance Form" at http://www.carli.illinois.edu/I-Share/docs/compli.pdf, in addition to filling out this web form.</p> <p>When the form has been received by the CARLI System Services group, you will receive your account and password.</p> <p>For more information about WebVoyage customization in the I-Share environment, contact CARLI at</p>	<p>Has the IUG OPAC Team confirmed that your changes are within the consortium's WebVoyage Customization Guidelines? <input type="radio"/> Yes <input type="radio"/> No Describe briefly the new features and changes in the look and feel contained in this release: <input type="text"/> Date on which this change should go in, if possible: <input type="text"/> Pick one: <input type="radio"/> I want to sign off on the new version when it is staged, before you put it into production. <input type="radio"/> Just put it in. Are there any changes to the thumbnails? <input type="radio"/> Yes <input type="radio"/> No Which database is currently pointed at by the WebVoyage in your development environment? <input type="radio"/> Training <input type="radio"/> Production</p>

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<p>support@carli.illinois.edu and review the documentation posted at http://office.ilcso.illinois.edu/voyager/traintf/opac.html. The username for this page is ILCSOtrain. Call CARLI at 217-244-7593 if you need the password.</p> <p>NOTE: This account may NOT be used for any purpose other than WebVoyage development.</p>	
Other (not listed above)	Notes: only