

**Cataloging****RDA TOOLKIT OPTION**

**Description:** This new option configures context sensitive links from the Cataloging client to the RDA Toolkit online, if your library has a subscription.

**Click Path:** Cataloging> RDA Toolkit

**Timing:** Optional. Complete at any time following upgrade.

**Documentation:** Voyager System Administration User's Guide: pages 4-92

**Steps:** Check when completed.

1. Determine if your institution has a subscription to the RDA Toolkit online. If no, you may skip this setup.
2. If yes, is the authentication IP based, or individual user-access? Answer: \_\_\_\_\_
3. Check the checkbox for "Enable RDA Toolkit Links."
4. If your RDA Toolkit access is through an institutional username and password, enter the username and password. If your RDA Toolkit access is through IP authentication or set up for individual users, leave the the username and password blank. An RDA Toolkit tab will appear in the Cataloging Client under the Session Defaults and Preferences so each cataloger can set a specific username and password.
5. Click Save.

**DEFAULT ITEM TYPES FOR CATALOGING POLICY DEFINITION LOCATIONS**

**Description:** Each location in a cataloging policy definition must now have a default item type assigned, in order to enable new cataloging client functionality.

If you begin to edit a policy definition where one or more locations lacks a default, you will be unable to save the definition until all defaults are assigned.

**Click Path:** Cataloging> Policy Definitions> select policy definition> click Edit

**Timing:** Recommended. Complete as soon as possible following the upgrade.

**Documentation:** Voyager System Administration User's Guide: pages 4-87 through 4-89

**Steps:** Check when completed.

1. Select and begin editing a cataloging policy definition. If you do not receive a warning, "One or more locations are missing a default item type," you may skip this setup.
2. If you see the warning, click OK, then click Cancel.
3. In the CARLI\_Reports\_2015.mdb database, run the query, "Cat Policy Group Locs Missing Default Item Types."
4. Select the policy definition and click Edit.
5. Click the Locations tab.
6. In the Selected Locations column, find the locations listed in the report. Click the drop down for Initial Default Item Type, then select the appropriate item type.
7. Once all locations have been updated, click Save.

### QUALITY HIERARCHY OPTION (MORE INFORMATION AFTER UPGRADE)

**Description:** A new 040 \$e rda option is now available for quality hierarchy logic in certain bib or authority duplicate detection profiles.

**Timing:** CARLI will test this setting and contact your library following the upgrade.

## Circulation

### EDIT MULTIPLE CALENDARS SIMULTANEOUSLY

**Description:** This enhancement allows you to edit multiple circulation calendars simultaneously.

**Click Path:** Circulation> Calendars

**Timing:** Optional. Complete at any time following upgrade.

**Documentation:** Voyager System Administration User's Guide: pages 5-27 through 5-31

**Steps:** Check when completed.

1. To select multiple calendars to edit simultaneously, you can either hold down the shift key while clicking to select a range of calendars, or hold down the Control key to select specific multiple calendars.
2. Click the Edit Multiple button.
3. Make edits as needed on the Selected, Coverage, Exception Dates, and Term Loans tabs. Click Save.

### ADDITIONAL SYSADMIN SETTINGS THAT CAN BE EDITED SIMULTANEOUSLY

**Description:** Voyager 9.1.1 also allows the settings on the Circulation Policy Definition Item tab, Matrix tab, and Short Loan Matrix tab to be edited simultaneously. These three tabs allow all settings to be edited, where as calendars (above) allow only a selected subset. The general steps for these three Circ Policy Definition tabs are summarized below.

**Click Path:** Circulation> Policy Definition> select policy definition> click edit. Select the Items tab, Matrix tab, or Short Loan Matrix tab.

**Timing:** Optional. Complete at any time following upgrade.

**Documentation:** Voyager System Administration User's Guide: Item Tab page 5-89 through 5-90; Matrix tab pages 5-92 through 5-111; Short Loan Matrix tab pages 5-117 through 5-129

**Steps:** Check when completed.

1. To select multiple entries to edit simultaneously, you can either hold down the shift key while clicking to select a range of entries, or hold down the Control key to select specific multiple entries.
2. Click the Settings Multiple button.
3. Verify that the appropriate item types, matrix entries, or short loan matrix entries have been selected on the "Selected" tab.
4. Make edits as needed on the Settings tabs (and Intervals tabs, for matrix entries). Check the Modify? checkbox to enable updating the value.
- Click save for the tab. Click save for the policy definition.

### OVERNIGHT LOAN FUNCTIONALITY (MORE INFORMATION AFTER UPGRADE)

**Description:** The Overnight Loan Functionality, also called "Fixed due times" by the Voyager Documentation, gives libraries the ability to specify fixed due date and time for the next open day.

**Timing:** CARLI will continue to double-check the accuracy of this enhancement and will contact all I-Share libraries following the upgrade. Overall, the setting is optional; use enhancement whenever needed at your library.

## PATRON NOTE TYPE

**Description:** Libraries can define new patron notes types which can be assigned to patrons in Voyager Circulation.

**Click Path:** Circulation> Patron Note Types

**Timing:** Optional. Complete at any time following upgrade.

**Documentation:** Voyager System Administration User's Guide: pages 5-50 through 5-51

**Steps:** Check when completed.

1. Click the New button to add a new patron note type.
2. Enter the Name for the new patron note type. Click Save.

## DEFAULT PATRON DATES

**Description:** Allows you to enter the default expiration and purge dates for any patron record added manually in the Circulation client.

**Click Path:** Circulation> Patron Default Dates

**Timing:** Recommended. Complete as soon as possible following the upgrade.

**Documentation:** Voyager System Administration User's Guide: pages 5-51 through 5-54

**Steps:** Check when completed.

1. Enter a default Expiration Date, and a default Purge Date, click Save.
- Note: The relative date options seem more practical than the Exact options, but you can decide based on your library's policies.

## DUE DATE SLIP PRINT

**Description:** Allows you to determine the default printing preference for the Circ Happening Location among three options: No Due Date Slip, Per Single Charge, All Charges in One Receipt.

**Click Path:** Circulation> Policy Definition> select policy definition> click edit> Locations Tab> select Circ HAPPENING location from selected side> click Settings button> Settings Tab.

**Timing:** Recommended. Complete as soon as possible following the upgrade.

**Documentation:** Not yet updated in the Ex Libris System Administration Documentation.

**Steps:** Check when completed.

1. On the Settings Tab for the Circ HAPPENING location, notice the Due Date Slip Print options.
2. Choose the primary method that will be used by staff at that circulation happening location; your choice will become the default setting.
3. Click OK. Click Save for the Policy Definition.

## REVIEW CIRCULATION ALERTS

**Description:** Alerts notify circulation staff of item and patron situations in Voyager Circulation. The alerts were already in use in Voyager 7.2.5, but it may be a good time to review your library's settings.

**Click Path:** Circulation> Policy Definition> select policy definition> click edit> Locations Tab> select Circ HAPPENING location from selected side> click Settings button> Alerts tab.

**Timing:** Optional. Complete at any time following upgrade.

**Documentation:** Voyager System Administration User's Guide: pages 5-135 through 5-138; 5-162 through 5-169

**Steps:** Check when completed.

1. On the Alerts Tab for the Circ HAPPENING location settings, review the alerts enabled for your library.  
 NOTE: The display column shows whether the alert will be an FYI alert, which displays passively in the discharge window, or a dialog alert, which will generate a pop-up notice.  
The Name, Barcode and Phone checkboxes near the Display column determine whether the patron's name, barcode, or phone number will be displayed within the alert notice.
2. Click OK. Click Save for the Policy Definition.

## LOST ITEM RETURN SETTINGS

**Description:** New enhancements allow authorized circ operators the opportunity to adjust a user's fines, fees, and the lost item counter automatically when a lost item is returned. With these settings, consider your library's policies as a whole, not a specific library staff member's tasks. (Will ANY staff member do this?) Additional security settings (detailed in the Security section of this checklist) allow you to configure which specific Circ Operators have the ability to perform these tasks at the time of discharge.

**Click Path:** Circulation> Policy Definition> select policy definition> click edit> Policies Tab

**Timing:** Recommended. Complete as soon as possible following the upgrade. Updated Best Practices for Lost Item documentation will be forthcoming.

**Documentation:** Voyager System Administration User's Guide: pages 9-73 through 9-77

**Steps:** Check when completed.

1. Check the check box for Remove (forgive) the lost item replacement fee.
2. Check the check box for Decrement the patron's lost item counter.
3. Does ANY staff member at your library routinely:  
\*Remove (forgive) any overdue fines? Circle: YES NO  
\*Remove (forgive) the lost item processing fee? Circle: YES NO  
If yes, check those check boxes.
4. Select a default posting type for the Posting Type for crediting returned lost item fines. This posting type will be used for the fines/fees updated through the Lost Item Return discharge options.
5. Click Save for the Policy Definition.

## TITLE LEVEL HOLDS/RECALLS

**Description:** A copy level hold requires your library's particular copy (the exact item) to be returned, for the hold or recall to be fulfilled. A title level hold allows any copy of your library's title (any item record associated with the same bib record, for which the matrix entry allows a hold) to be returned, for the hold or recall to be fulfilled. When the first item is discharged to fulfill the hold, the hold is fulfilled. The hold or recall is then complete, and the other items associated with the title are no longer targeted by a duplicate request. Note that I-Share libraries very rarely place "holds" on behalf of patrons.

**Click Path:** Steps 1-3: Circulation> Policy Definition> select policy definition> click edit> Policies Tab  
Step 4: Circulation> Policy Definition> select policy definition> click edit> Matrix Tab> select and edit Matrices

**Timing:** Optional. Complete at any time following upgrade; as soon as possible if your library has library staff place holds or recalls.

**Documentation:** Voyager System Administration User's Guide: pages 5-68 through 5-69

**Steps:** Check when completed.

1. Decide whether to check or uncheck "Allow title level holds on bibs with no items- Circ."  
This checkbox is checked by default with the upgrade. Examples of when this setting might be useful include:  
a)placing an advance hold request for an "on order" title  
b)placing a hold on titles that do not receive item records, such as periodicals or microforms.
2. Check the check box for "Title level hold: item in transit to hold shelf fulfills request."
3. Click Save for the Policy Definition.
4. Review your library's matrix entries to determine whether library staff can place a hold for a particular Patron Group/Item Type combination. Use the Voyager Access report named "Full Matrix Entry Report for Circulation Staff" for assistance.  
NOTE: If title level holds are enabled for your library in Request Configuration (described below), the title level holds DO NOT consult the matrix entries before allowing or denying a staff member's ability to place a title level hold. If no matrix entries for that title have the "Hold" checkbox checked for the patron group, the patron's hold request will be unable to be filled and will expire. SUMMARY: You can place a title level hold, but if no item-level matrices that apply to the items associated with the title (bib) allow holds, the hold cannot be filled.
5. Click Save for the Policy Definition.

## PATRON HOLD LIMITS

**Description:** Libraries can define a limit on the number of holds that a patron can have placed for them by library staff. Once a patron has reached the hold limit, testing shows that the patron is then blocked from any additional circulation activity, and they require an override until some of the holds are fulfilled or expired. Currently, this is how placing a limit on the number of recalls also functions. Keep this in mind if choosing to add Hold limits for a patron group. These settings apply to local holds; they do not affect callslip requests or UB (I-Share) requests.

**Click Path:** Circulation> Policy Definition> select policy definition> click edit> Patron Tab

**Timing:** Not recommended.

**Documentation:** Voyager System Administration User's Guide: pages 5-72 through 5-82; specifically 5-80

**Steps:** Check when completed. Continued on next page.

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1. CARLI does not recommend this setting since it blocks all patron activity, rather than just additional hold requests. Review whether this setting is truly desired at your library for the patron group. If yes, continue below.
2. Select the patron group you would like to edit and click the "Rules" button.
3. Check the check box for "Max Hold Requests Apply". Enter a value in the value box.
4. Check or uncheck "Include Pending Hold Requests In The Max Borrowed Items Limit."
5. Click OK. Click Save for the Policy Definition.

### ITEM SETTINGS FOR HOLDS

**Description:** Libraries can allow library staff to place holds on items with a missing status, Lost-Library Applied Status, or Lost-System Applied Status.

**Click Path:** Circulation> Policy Definition> select policy definition> click edit> Items Tab

**Timing:** Optional. Complete at any time following upgrade.

**Documentation:** Voyager System Administration User's Guide: pages 5-82 through 5-87

**Steps:** Check when completed.

1. Think about your library's policies for the item type you are editing. Does it make sense for library staff to place a hold or recall for that item type, when the item has a status of Missing, Lost- System Applied, or Lost- Library Applied? If yes, continue below.
2. Select the Item Type(s) you would like to edit and click the Settings or Settings Multiple button.
3. The OPAC Hold and OPAC Recall settings do not apply in I-Share libraries. Leave unchecked.
4. Check or uncheck the "Circ Hold" and "Circ Recall" settings for each item status based on your library policy.
5. Click OK. Click Save for the Policy Definition.

### REQUEST CONFIGURATION

**Description:** Libraries can choose whether to allow library staff to place Copy Level Holds, Title Level Holds, Copy Level Recalls, and/or Title Level Recalls. Library staff operator security settings and matrix entry settings already limit who can place holds and recalls for which items; these settings determine which type of holds or recalls can be placed overall at the library.

**Click Path:** Circulation> Request Configuration

**Timing:** Optional. Complete at any time following upgrade.

**Documentation:** Voyager System Administration User's Guide: pages 5-169 through 5-72

**Steps:** Check when completed.

- NOTE: By default, these settings are checked. Since I-Share libraries do not do place holds or recalls in the OPAC, only the CIRC options apply.
1. If you do not want your library staff to place title level, or copy level holds or recalls, uncheck the checkboxes.
  2. Click Save.

**Security**

**SECURITY OPTIONS**

**Description:** This new section allows you to implement password requirements for operators at your library. With the upgrade, a few password defaults are set, the majority of which only apply to any NEW or CHANGED password. The defaults are that the new password cannot be the same as the previous 3 passwords and there is a minimum 8 maximum 25 password length requirement. The only new password default that applies to existing passwords is the EXPIRATION interval. THE ONLY REQUIRED SETTING IS THE PASSWORD LENGTH.

**Click Path:** Security> Security Options

**Timing:** Recommended. Complete as soon as possible following the upgrade.

**Documentation:** Voyager System Administration User's Guide: pages 9-118 through 9-125

**Steps:** Check when completed.

- 1. Determine the password settings that you want to use locally, or that your campus may require. The settings are detailed below by tab. NOTE THAT THE ONLY SETTING VOYAGER REQUIRES IS THE PASSWORD LENGTH.
- 2. Enter the Password Requirements Tab settings
  - New password cannot be the same as previous \_\_\_\_ passwords.
  - Minimum password age (value): \_\_\_\_\_, (circle interval): Days OR Hours
  - Maximum password age (expiration) \_\_\_\_ days. EXPIRATION is the only new password setting that applies to existing passwords. If you set a password expiration interval, any existing password that is older than that expiration interval and that is NOT set to "Never Expire" in the Operator Profile, will be expired. The user will be prompted to create a new password at next login.
  - Alert user \_\_\_\_ days before password will expire.
  - Password length: Minimum- at least \_\_\_\_ characters
  - Password length: Maximum- at most \_\_\_\_ characters
  - Password may contain User's ID? Yes or No
  - Password may contain User's name? Yes or No
  - Password must contain: All requirements below OR At least \_\_\_\_ of the requirements selected below
  - At least \_\_\_\_ alphabetic character(s)
  - At least \_\_\_\_ uppercase character(s)
  - At least \_\_\_\_ lowercase character(s)
  - At least \_\_\_\_ number character(s)
  - At least \_\_\_\_ special character/symbol(s)
  - Special/symbols \_\_\_\_\_ choose which are allowed
- 3. Enter the Password Requirements Tab 2 settings
  - Account will be locked after \_\_\_\_ invalid login attempts.

Steps continue on next page.

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- If locked out, the lockout period will be (value):\_\_\_\_\_, (circle interval): Days OR Hours
- Enter the text that will be shown on the change password screen. NOTE: This text will show in all of the Voyager clients.
- 4. Invalid Login Attempts Tab; Check or uncheck the checkbox for "Record invalid login attempts."
- 5. Click Save

### OPERATOR PROFILE EXPIRATION

**Description:** As a consequence of the new security options you can choose to select "This password never expires" or "Expire Account Now" on specific operator IDs.

**Click Path:** Security> Operator Profiles> Select individual profiles.

**Timing:** Optional. If you set a password expiration lengths in the Security> Security Options, review your Voyager Operators (staff usernames) to determine whether some passwords should never expire.

**Documentation:** Voyager System Administration User's Guide: pages 9-15 through 9-19

**Steps:** Check when completed.

- NOTE: CARLI is going to set all CARLI Office staff passwords in your databases as "Never expire"; please do not change this setting for our usernames.
- NOTE: Passwords for SelfCheck machines should be set to "Never expire". CARLI recommends that these passwords still follow the strong password settings for your library. If you change a password for a SelfCheck machine, please notify whoever manages the settings on self-check hardware or authentication services.
- 1. If you set a password expiration interval in the Security> Security Options, continue below. Otherwise no change is needed.
- 2. Click edit for each Operator Profile. Check or uncheck the "This password never expires" checkbox.
- 3. Be aware that if needed, there is a "Expire Account Now" button available.
- 4. Click Save.

### SECURITY CIRCULATION PROFILES

**Description:** Permissions previously set in Voyager 7.2.5 will be carried forward into Voyager 9.1.1. The Circulation Profiles now have two Profile Tabs instead of one, to accommodate new settings, including those related to new permissions for Pick and Scan's new features. Only the new permission options are noted below.

**Click Path:** Security> Circulation Profiles> select profile> click Edit

**Timing:** Optional. If you set a password expiration lengths in the Security> Security Options, review your Voyager Operators (staff usernames) to determine whether some passwords should never expire.

**Documentation:** Voyager System Administration User's Guide: pages 9-73 through 9-92

**Steps:** Check when completed.

- 1. Select the Circulation profile, click Edit.
  - 2. Click on the Profile 1 tab. The new permissions to consider for each profile are:
    - Modify Outstanding Fines/Fees
- Steps continue on next page.



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- Lost item return: refund overdue
- Lost item return: refund replacement fee. Someone at your library should have this checkbox checked.
- Lost item return: refund processing fee
- Lost item return: decrement patron lost counter. Someone at your library should have this checkbox checked.
- 3. Click on the Profile 2 tab. The new permissions to consider are related to the use of Pick and Scan. The new settings for each profile are:
  - Update Holding Record with Pick and Scan
  - Delete Holdings Records
  - Delete Bibliographic Records
- 4. Click on the Item Blocks tab. The new permissions to consider for each profile are:
  - All items for title are lost or missing.
  - Item has an item status of Lost-Library Applied: CARLI will test to determine the effects of this setting and notify your library.
  - Item has an item status of Lost-System Applied: CARLI will test to determine the effects of this setting and notify your library.
  - Item has an item status of Missing: CARLI will test to determine the effects of this setting and notify your library.
  - There are no items for this title.
- 5. Click on the Patron Blocks tab. The new permissions to consider for each profile are:
  - Charged Items Limit (includes hold request)
  - Charged Items Limit for Item's Item Type (includes hold requests)
  - Charged Items Limit for Item's Policy Group (includes hold requests)
  - Charged Items Limit for Policy Group for Item's Item Type (includes hold requests)
  - Hold request limit.

### System

#### EVENTS

**Description:** Enabling a new SysAdmin setting will make it possible to save the date and time for browse transactions.

**Click Path:** System> Events

**Timing:** Recommended. Complete as soon as possible following the upgrade.

**Documentation:** Voyager System Administration User's Guide: pages 10-20 through 10-21

**Steps:** Check when completed.

- 1. Select BROWSE. Click Edit.
- 2. Click the "Retain event" checkbox. Click Save.
- 3. Select UBBROWSE. Click Edit.
- 4. Click the "Retain event" checkbox. Click Save.