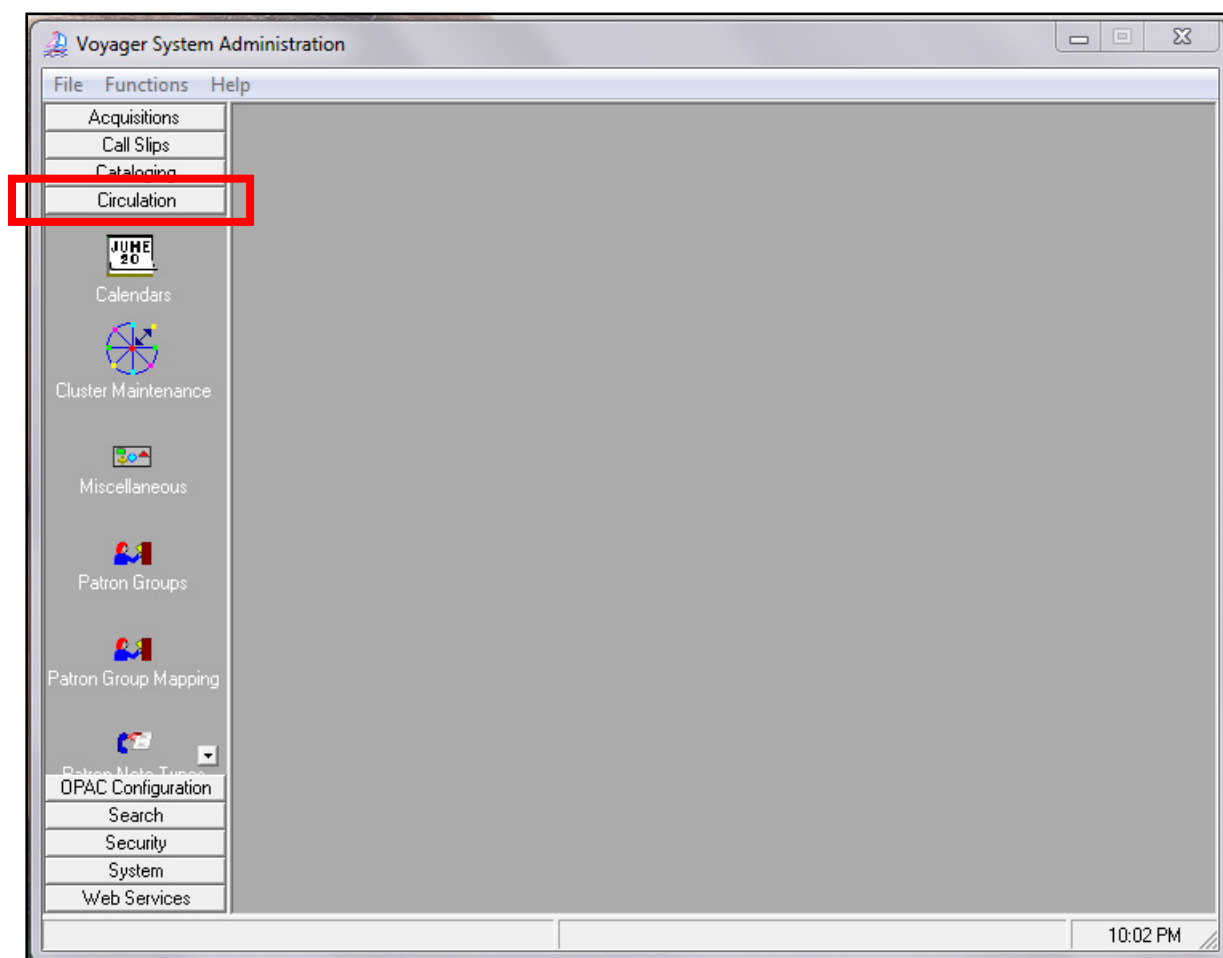# Voyager System Administration in I-Share Libraries

# PART 3: CIRCULATION AND UNIVERSAL BORROWING



*Circulation System Administration Workspace*

Legend:
      ⊕ Consortial Rule for setting value(s)
      ☑ CARLI Recommendation for setting value(s)
      ∅ Does not apply; Or, Do not change this value

# TABLE OF CONTENTS

**NOTE: Screen shots that appear throughout this document come from a variety of I-Share databases. The settings do not always represent the values your library should be using for your policies.**

Page references refer to the *Voyager® 9.1.1 System Administration User's Guide.*
http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_System_Admin_9_1_1.pdf

Legend:
 ⊕ Consortial Rule for setting value(s)
 ☑ CARLI Recommendation for setting value(s)
 ∅ Does not apply; Or, Do not change this value

# I. Introduction

This chapter of the I-Share System Administration document is a concise and annotated supplement to the Circulation portion of the full *Voyager 9.1.1 System Administration User's Guide*. Use this document to learn the I-Share consortial requirements and recommendations for the settings in the Circulation portion of Voyager System Administration. Along with the official Voyager manual, use this document to guide your profiling and configuring in Voyager. The *Voyager 9.1.1 System Administration User's Guide* contains additional information and explanations; consult it for further detail.

http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_System_Admin_9_1_1.pdf

# II. Calendars



*Circulation Calendars Workspace*

Summary:

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
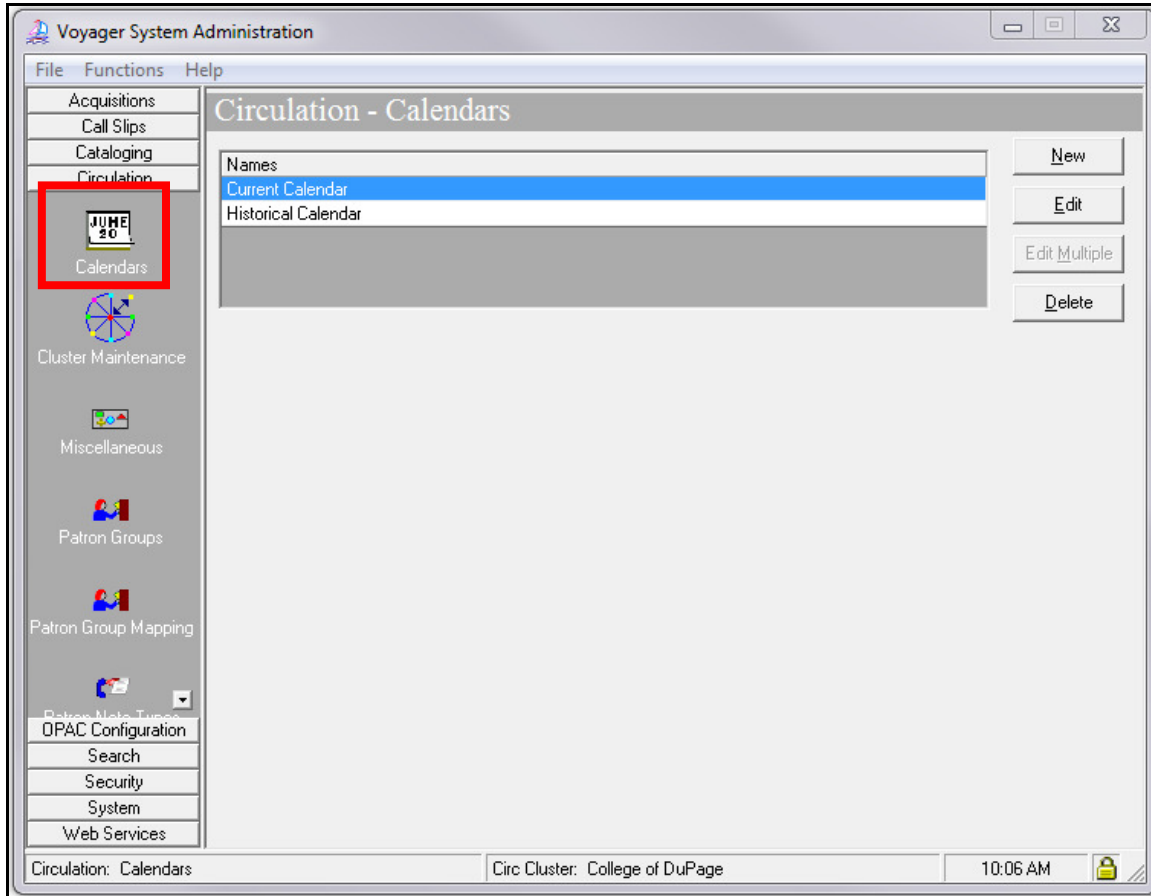- End of term date and lead days for term loans

Legend:

⊕ Consortial Rule for setting value(s)

☑ CARLI Recommendation for setting value(s)

∅ Does not apply; Or, Do not change this value

A circulation desk must have at least one active calendar. The active circulation calendar(s) need to cover future dates and all historical dates:

- Voyager needs active calendar(s) covering all historical dates in order to perform discharge transactions.
- Voyager needs an active calendar to calculate future due dates, and so that your library and other I-Share libraries can perform transactions with your library's items and/or patrons.
- Different policy groups may share an active calendar. If all of your circulation desks have the same hours, consider sharing one active calendar for those locations.
- Once you have used a calendar, never delete it.

## Creating Calendars: Considerations for New I-Share Libraries

NOTE: You have the option to create one calendar that combines both the historical circulation and the current circulation. You also have the option to make calendars open-ended. There are many approaches to take when creating calendars. In general, the simpler, the better—and the easier to manage.

- See *Voyager 9.1.1 System Administration User's Guide* pages 5-8 through 5-24 for more information on creating circulation calendars.

| ☑ *Define at least two initial calendars* | One calendar to cover past transactions and one for current and future transactions.<br>• You may need additional active calendars if your library has multiple locations with different hours. |
|---|---|
| ⊕ *Historical calendar* | The Historical Calendar must cover any historical circulation transactions that convert from your prior system. It should include a Start Date of 01/01/1981. This is consistent with most I-Share libraries.<br>• The start date should be older than your oldest charge.<br>• Choose a date that makes sense for your institution. Possible end dates for the Historical calendar:<br>  o the day before your current semester started<br>  o the day date before your fall semester begins<br>  o the day before you "go live" with Voyager<br>• Enter your library's normal open hours.<br>• There is no need to enter any data on the Exception Dates or Term Loans tab for the historical calendar. |
| ⊕ *Current calendar(s)* | The current calendar(s) control current transactions.<br>• This calendar can have an end date, or can be open-ended.<br>• Calendars should not overlap dates. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

# Steps to Create a New Calendar

Click path:

Voyager System Administration> Circulation> Calendars> click the New button.

Fill out all five tabs (steps A-D) outlined below, and save the new calendar (step E).

See *Voyager 9.1.1 System Administration User's Guide* pages 5-8 through 5-24 for more information on creating circulation calendars.

## A. Selected Tab

Descriptions:

| *Calendar Name:* | Name the calendar as appropriate for your library.<br>• Some libraries use "Historical" and "Main" as calendar names.<br>• Some libraries name calendars for each term, academic year, or each branch library. |
|---|---|

## B. Hours Tab

Descriptions:

| *Start Date:* | The date on which this active calendar will/did become active.<br>• Calendars should not overlap dates. |
|---|---|
| *End Date:* | [Optional] The last date on which this calendar is active.<br>• To make a calendar open-ended, leave the End Date blank. |
| *Fixed Due Date:* | [Optional] If you enter a fixed due date, any item that would normally receive a later due date will instead receive the fixed due date.<br>• The purpose of a *Fixed Due Date* is to prevent items from being due after a specific date.<br>• Voyager applies fixed due dates across all item/patron matrices.<br>• The *Fixed Due Date* does not affect items with a TERM or INDEF loan period. |
| *Overnight Loans:* | [Optional] The Overnight Loan Functionality, also called "Fixed due times" in the Voyager Documentation, gives libraries the ability to specify a fixed due time for the next open day.<br>• Overnight Loans only apply to items with an hourly or a minute-based loan period.<br>• A day's "In Effect" time determines when, on the day in question, the Overnight Loan functionality takes effect.<br>• For items charged after the "In Effect" time, the "Due" time is when, on the next day, those items will be due.<br>Refer to pages 5-12 through 5-14 of the Voyager System Administration User's Guide.<br>• The first step toward enabling "Overnight Loans" at your library is to check "Apply Fixed Due Time for Overnight Loans" in the Circulation Policy Definition>Policies tab as seen on page 29 of this documentation.<br>• **Warning: Do not set the In Effect time to be midnight (12:00AM), or a software bug will prevent overnight loans from functioning properly. If midnight is your library's** |

Legend:

&#8853; Consortial Rule for setting value(s)

&#9745; CARLI Recommendation for setting value(s)

&#8709; Does not apply; Or, Do not change this value

**desired In Effect time, choose either 11:59PM or 12:01AM instead.**

- Determine your In Effect time based on the loan period of the item types that will be eligible for Overnight Loan. If the amount of time between the In Effect time and your library's closing time is MORE than the item's loan period, Voyager will either calculate the regular due time based on the matrix, or calculate the due time to be the closing time of the library.
- An item with an hourly loan period that is charged after the In Effect time will receive the next open day as the due date, and the Overnight Loan Due for that day as the due time.

- Examples:

| | Open Time | Close Time | .......Overnight Loans....... |  |
|---|---|---|---|---|
| | | | Due | In Effect |
| Sunday: | Closed | Closed | | |
| Monday: | 07:30 AM | 09:00 PM | 09:00 AM | 08:00 PM |
| Tuesday: | 07:30 AM | 09:00 PM | 09:00 AM | 08:00 PM |
| Wednesday: | 07:30 AM | 09:00 PM | 09:00 AM | 08:00 PM |
| Thursday: | 07:30 AM | 09:00 PM | 09:00 AM | 08:00 PM |
| Friday: | 07:30 AM | 07:30 PM | 09:00 AM | 06:30 PM |
| Saturday: | 09:00 AM | 03:00 PM | 12:00 PM | 02:00 PM |

Save     Cancel

An item with an hourly loan period charged on Monday night between 8:00PM (the In Effect time) and 9:00PM (the library's close time), will have a due date of 9:00AM on Tuesday morning.

An item with an hourly loan period charged on Saturday afternoon between 2:00PM (the In Effect time) and 3:00PM (the library's close time), will have a due date of 9:00AM on Monday, since the library is closed on Sunday.

Legend:
   ⊕ Consortial Rule for setting value(s)
   ☑ CARLI Recommendation for setting value(s)
   ∅ Does not apply; Or, Do not change this value

## C. Exception Dates Tab

[Optional] Most libraries have a date or range of dates when the library has different hours. Enter these dates in the Exception Dates workspace. You can enter a range of dates simultaneously, provided they all have the same time values.

Descriptions:

| *Exception Date:* | Dates that deviate from the usual schedule which you have defined in the Open/Closed values.<br>This includes:<br>• Dates when the library is closed when normally open, or open when normally closed.<br>• Dates when the open/close times differ from the usual schedule. |
|---|---|

## D. Term Loans Tab

[Optional] The purpose of the Term Loan is to allow patrons to charge or renew items one semester at a time.

If your library chooses to use Term Loans, enter a term date and a number in the Lead Days field, then click the Add button. You can establish term loans for specific patron groups by choosing the Term loan period settings in the item matrix entries, see pages 49-62 of this documentation.

For example, if you want Faculty to be able to charge books out for an entire term, and you want the books to be due at a specific time before the end of the semester, enter dates in the calendar's Term Loan tab and set the matrix entry accordingly. If Faculty wish to renew for another semester, they can renew within the period of Lead Days you configure in the Term Loans Tab, if renewals are allowed by the matrix entry settings.

Descriptions:

| *End of Term:* | The due date Voyager should assign to items that can be charged out until the end of the term. |
|---|---|
| *Lead Days:* | 0-999 determines the number of days before the end of the term during which eligible patrons can renew an item so that it is due at the end of the following term.<br><br>If your charge a term loan item to an eligible patron during the current term's Lead Days, the due date will be the end of the next term. |

## E. Save the Calendar
Once you have edited all tabs within the Calendar workspace, click the Save button to save the calendar.

Legend:
   ⊕ Consortial Rule for setting value(s)
   ☑ CARLI Recommendation for setting value(s)
   ∅ Does not apply; Or, Do not change this value

# Editing Existing Calendars

You can edit single calendars, or multiple calendars at the same time.

> See *Voyager 9.1.1 System Administration User's Guide* pages 5-25 through 5-31 for more information on editing circulation calendars.

Click paths:

| | |
|---|---|
| ***Edit Single Calendar:*** | 1. Click to select the calendar you wish to edit.<br>2. Click the Edit button.<br>3. Make edits as needed on the Selected, Hours, Exception Dates, and Term Loans tabs.<br>4. Click OK. |
| ***Edit Multiple Calendars Simultaneously:*** | 1. 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.<br>2. Click the Edit Multiple button.<br>3. Make edits as needed on the Selected, Coverage, Exception Dates, and Term Loans tabs.<br>   • The Coverage tab offers a limited selection of settings from the Hours tab. The only available settings are Start Date, End Date, and Fixed Due Date.<br>4. Click OK. |

Legend:
     ⊕ Consortial Rule for setting value(s)
     ☑ CARLI Recommendation for setting value(s)
     ∅ Does not apply; Or, Do not change this value

# III. Cluster Maintenance
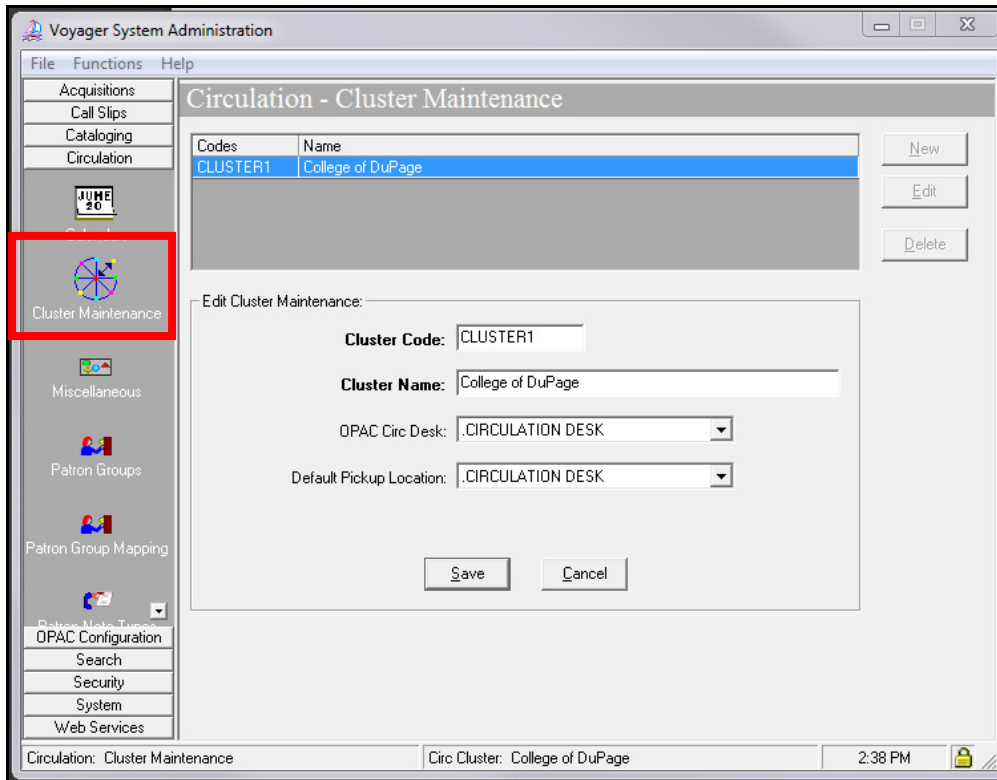


*Circulation Cluster Maintenance Workspace*

Each I-Share library has one (and only one) Circulation Cluster. The ability to create, edit, delete, or view Circulation Clusters is set up in the System Administration>Security>Master Profiles section.

>    See *Voyager 9.1.1 System Administration User's Guide* pages 5-5 through 5-8 for more
>    information on Circulation Clusters.

Click path:

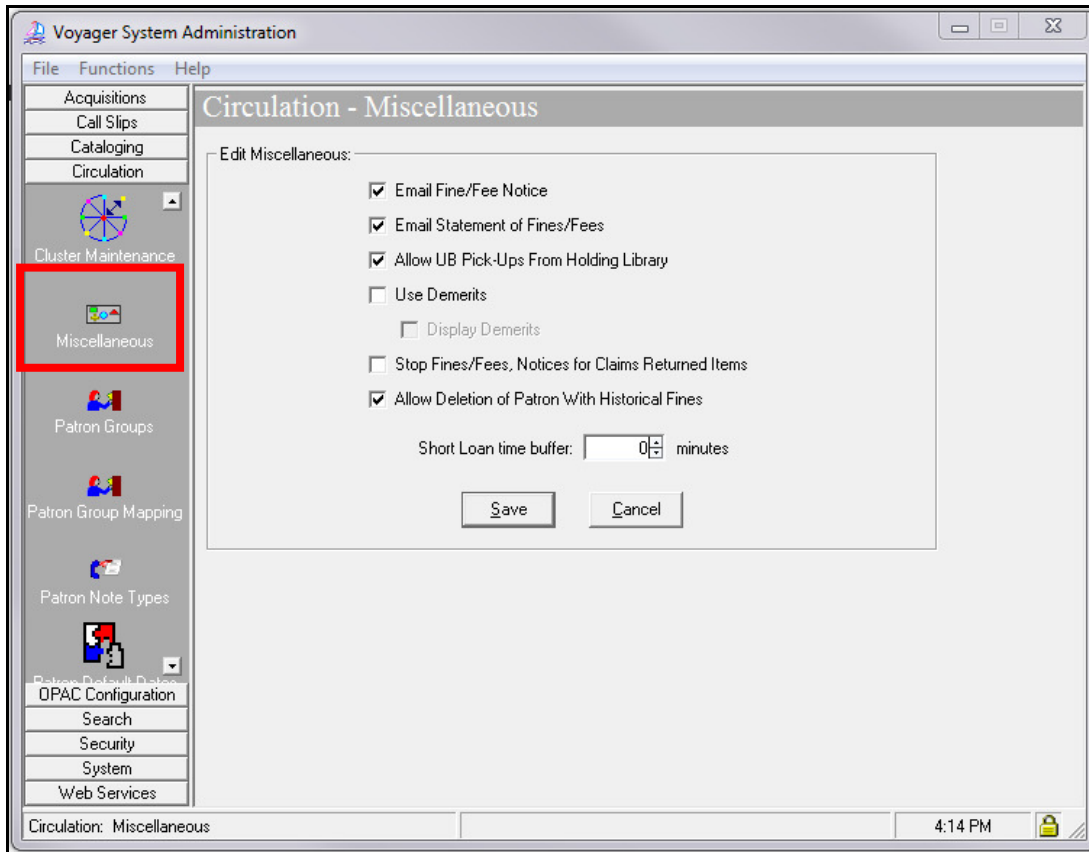>    Voyager System Administration> Circulation> Cluster Maintenance> select Cluster> click Edit.

Descriptions:

| | |
|---|---|
| ∅ ***Cluster Code:*** | Do not change this value. |
| ***Cluster Name:*** | After your initial bib load, make sure Cluster Name reflects the correct name for your institution. |
| ***OPAC Circ Desk:*** | Choose the Circulation HAPPENING location that will represent circulation policies occurring in the OPAC, for requesting and renewing. |
| ***Default Pickup Location:*** | Choose the location that will be first in the list of potential pickup locations that patrons see in the OPAC. |

Legend:

>    ⊕ Consortial Rule for setting value(s)
>    ☑ CARLI Recommendation for setting value(s)
>    ∅ Does not apply; Or, Do not change this value

# IV. Miscellaneous



*Circulation Miscellaneous Workspace*

The Circulation Miscellaneous section contains an assortment of Circulation-related settings.
See *Voyager 9.1.1 System Administration User's Guide* pages 5-34 through 5-38.
Click path:
Voyager System Administration> Circulation> Miscellaneous.

Descriptions:

| ☑ *Email Fine/Fee Notices:* | Voyager generates Fine/Fee Notices when a patron's account balance exceeds the "Min Balance for Notice" that you established in the Circ Policy Definition> Patron tab, as explained on page 34 of this documentation. |
|---|---|
| | • Check this box to activate email notification of Fine/Fee Notices. |
| | • If you do not check the box, all Fine/Fee Notices will print from the Voyager Reporter client. |
| | • If the patron record does not have a valid email address, the notice will print from the Voyager Reporter client. |
| | **CARLI recommends that you check this box.** |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ☑ *Email Statement of Fines/Fees:* | The Statement of Fines/Fees is a separate set of notices you can request through a CARLI WRO (choose Voyager Circulation: Circ 14 Fine/Fee Statements). Voyager will then generate these statements of fines/fees for all patrons with an outstanding balance at your library. CARLI can schedule them to generate periodically, or just as you request them.<br><br>• Check this box to activate email notification of Fine/Fee Statements.<br>• If you do not check the box, all Fine/Fee Statements will print from the Voyager Reporter client.<br>• If the patron record does not have a valid email address, the statement will print from the Voyager Reporter client.<br><br>**CARLI recommends that you check this box.** |
| ⊕ *Allow UB Pick-ups from Holding Library:* | Check this box to allow patrons from another I-Share library to request to pick up your library's UB-eligible materials at your library.<br><br>**Check this box.** |
| ∅ *Use Demerits:* | I-Share libraries do not use this functionality.<br><br>**Leave this box unchecked.** |
| *Stop Fines/Fees, Notices for Claims Returned Items:* | [Optional] Check this to stop the accrual of overdue fines, replacement and lost processing fees, and overdue notices when a library staff member assigns the 'Claims Returned' status to an item. |
| ☑ *Allow Deletion of Patron with Historical Fines:* | Check this box to allow patron records that have historical fines (i.e., paid, forgiven, or transferred via Bursar transfer) to be deleted via the circ client as well as purged in batch via Circjob 39.<br><br>**CARLI recommends that you check this box.** |
| ⊕ *Short Loan Time Buffer:* | Most I-Share libraries do not use this functionality.<br><br>Contact CARLI Support to discuss recommended settings if your library does use Short Loan.<br><br>**Set this value to zero**. |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

# V. Patron Groups

Each library uses patron groups to:
- determine a patron's circulation privileges
- determine the point at which various patron blocks become effective

Click path:

> Voyager System Administration> Circulation> Patron Groups.

Voyager populates patron group codes during the initial patron load process. I-Share libraries share a common list of patron groups.

> See *Voyager 9.1.1 System Administration User's Guide* pages 5-38 through 5-49 for more information on Patron Groups.

> **Libraries should not define new patron groups beyond these, which I-Share libraries use for consortial consistency**:

| Code | Name | Display Name |
|------|------|--------------|
| AA | AFFLORGAC | Affiliated Organization, Academic |
| AE | ACEMPLY | Academic Employee |
| AL | ALUM | Alumni |
| AO | AFFLORGOTH | Affiliated Organization, Other |
| AS | AFFLORGSTF | Affiliated Organization, Staff |
| EF | EMERITUSFC | Emeritus Faculty |
| EG | EXTMURALGR | Extramural Graduate |
| EU | EXTMURALUG | Extramural Undergraduate |
| FC | FACULTY | Faculty |
| GA | GRAD ASST | Graduate Assistant |
| GR | GRAD STDNT | Graduate Student |
| GS | STATEGVSTF | State Government Staff |
| GV | STATE GOVT | State Government |
| HS | HIGHSCHOOL | High School |
| II | INTL ILL | International ILL |
| IL | INTERLIB | Interlibrary |
| IN | ILLINETLIB | ILLINET Library |
| LB | LOCAL BUO | Local Building Use Only |
| LH | LOCAL HIPRV | Local High Privilege |
| LL | LOCAL LOPRV | Local Low Privilege |
| LS | LIBSTAFF | Library Staff |
| LU | LIBRARYUSE | Library Use |
| PH | PERMIT HI | Permit High Privilege |
| PL | PERMIT LO | Permit Low Privilege |
| PP | PROBLEMPAT | Problem Patron |
| RE | RETIRED | Retired |
| SS | SUPT STAFF | Support Staff |
| SY | LIBSYSTEMS | Library Systems |
| UG | UNDERGRADUATE | Undergraduate |
| **\*UBReg** | **UBReg** | **UBReg** |
| **\*UBLong** | **UBLong** | **UBLong** |
| **\*UBNonCirc** | **UBNonCirc** | **UBNonCirc** |
| **\*UBIN** | **UBIN** | **UBIN** |

**\*NOTE: CARLI Office staff will add the UB patron groups to each database.**
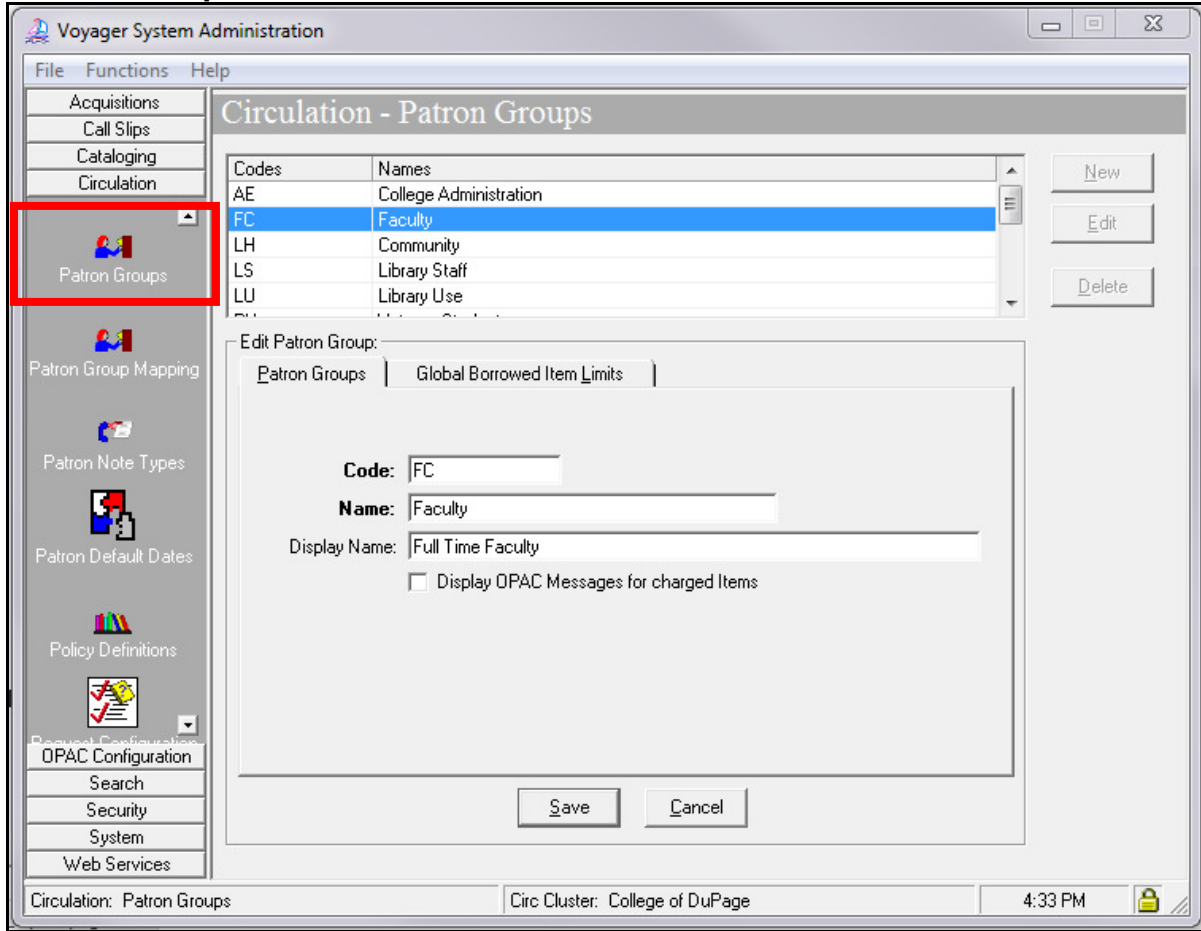
Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

# Adding/Editing Patron Groups

There are two tabs of information to complete when you add or edit a patron group.

## A. Patron Groups



*Circulation Patron Groups Workspace*

Descriptions:

| ⊕ **Code:** | New I-Share Libraries: Do not change the Patron Group Codes that are loaded during your conversion to Voyager. |
|---|---|
| | • If you decide to add a new patron group, select codes from the I-Share list of Patron Group Codes in the table on page 12. |
| | • If you add a new patron group in the future, please contact the CARLI Office. CARLI Office staff must do the "UB-mapping" into all other I-Share databases. |
| | • Do not edit the four UB patron groups (UBLong, UBReg, UBNonCirc, and UBIN). |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
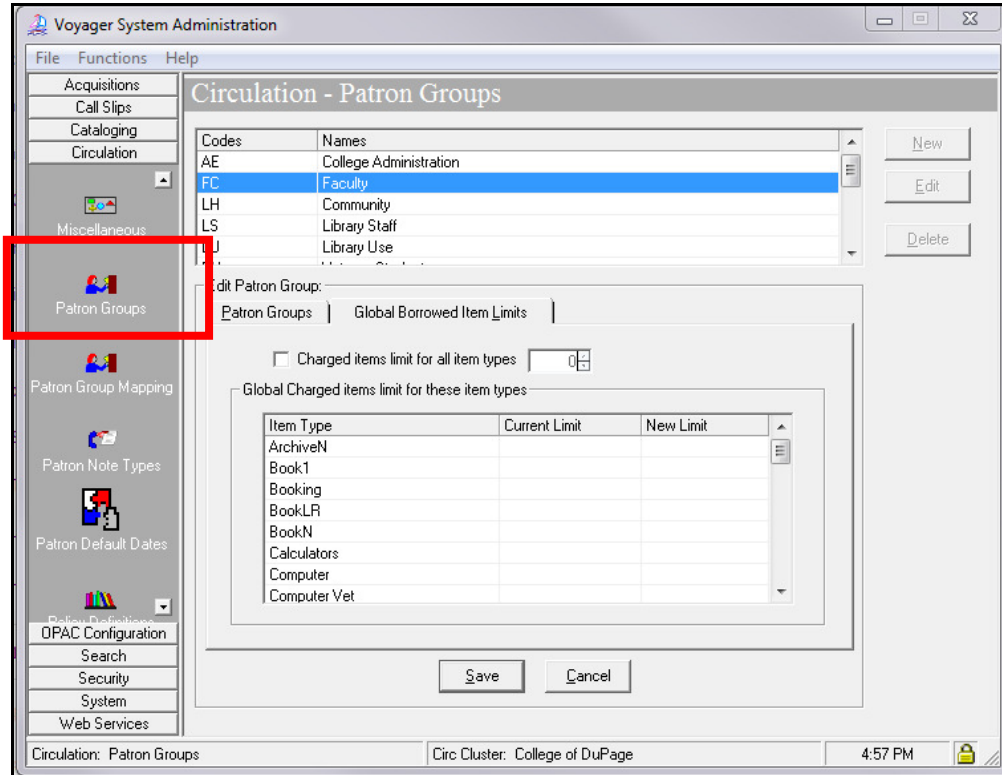    ∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ***Name:*** | How the patron group will display in the staff clients.<br>• Enter a Name that is consistent with how you will use the patron group in your library.<br>• If the Names in the chart on page 12 are adequate, please use them for consortial consistency. |
| ***Display Name:*** | How the patron group will display in WebVoyage.<br>• Enter a Display Name that is consistent with how you will use the patron group in your library. If this is left blank, the Patron Group Name will be used.<br>• If the Display Names in the chart on page 12 are adequate, please use them for consortial consistency. |
| ***Display OPAC Messages for charged items:*** | [Optional] When checked, if your site uses status patron groups, a message in the OPAC will display when an item is charged to a patron who belongs to a status patron group.<br>• The CARLI Office discourages the use of status patron group functionality and therefore recommends that you do not check this option.<br>• See our documentation on creating a Display Location/New Book Location for more information on why we do not encourage status patrons: http://www.carli.illinois.edu/products-services/i-share/circ/secure/DisplayLocation |

Legend:
   ⊕ Consortial Rule for setting value(s)
   ☑ CARLI Recommendation for setting value(s)
   ∅ Does not apply; Or, Do not change this value

## B. Global Borrowed Item Limits

[Optional] Each library can define a global limit on the number of items of a given item type that a patron in a given patron group may borrow. A global limit is an aggregate of values for all of your policy groups. Most I-Share libraries do not configure global limits.



*Circulation Patron Groups Workspace – Global Borrowed Item Limits*

Descriptions:

| | |
|---|---|
| **Charged items limit for all item types:** | [Optional] When selected, a global limit for the number of charged items applies to patron of this group. See pages 6-9 through 6-11 in the *Voyager 9.1.1 System Administration User's Guide*. |
| **New Limit and Current Limit:** | [Optional] After adding a new limit in the "New Limit" column, click the Save box. The value you entered updates the "Current Limit". This helps you to keep track of which limits you have changed in the current session. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

# VI. Patron Group Mapping
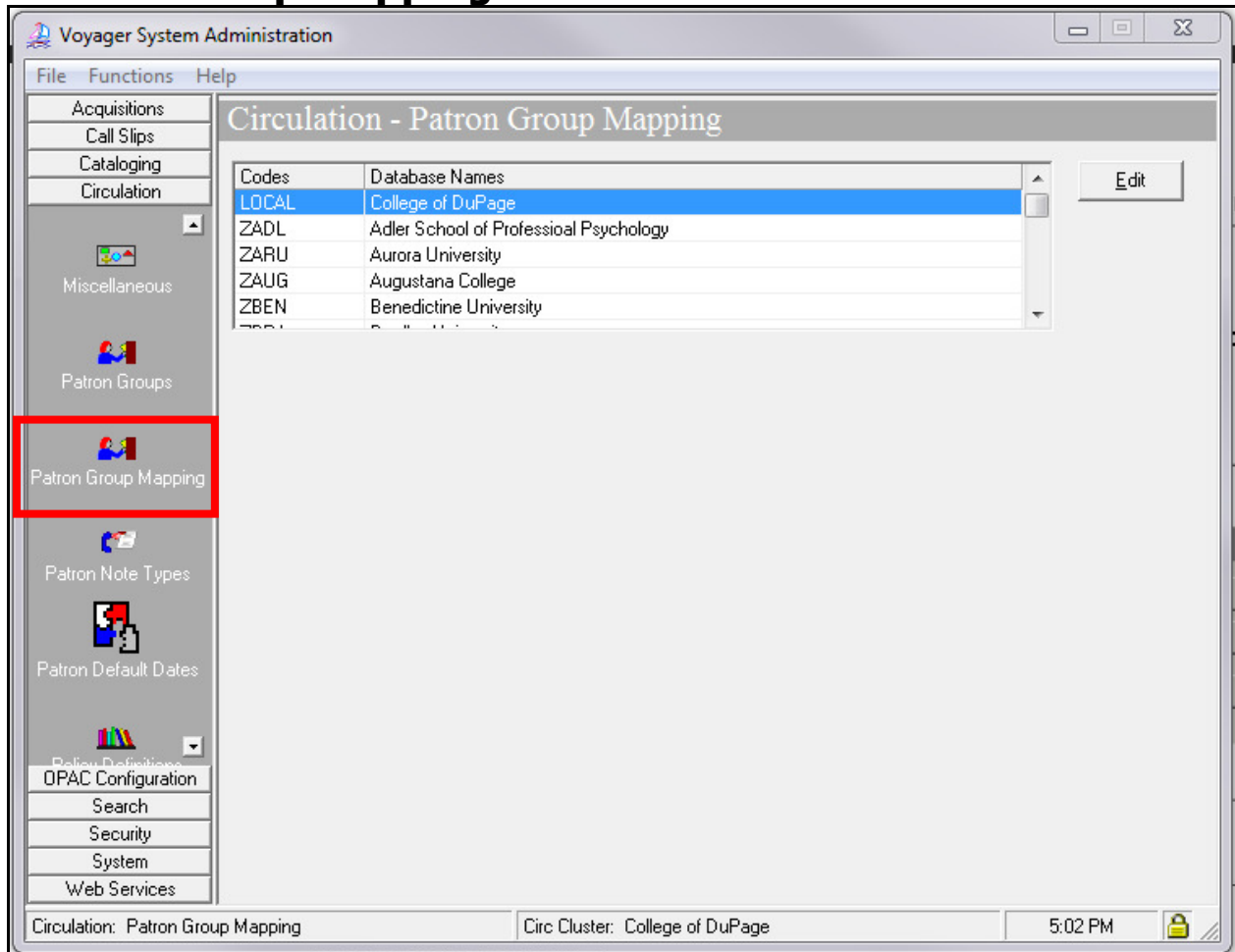


*Patron Group Mapping Workspace*

CARLI Office staff take care of Patron Group Mapping for Universal Borrowing.

∅ Do not change any mapped values in the Patron Group Mapping workspace.

If you ever add a new patron group, please contact the CARLI Office so the group can be appropriately UB-mapped into all of the other I-Share databases.

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

# VII. Patron Note Types
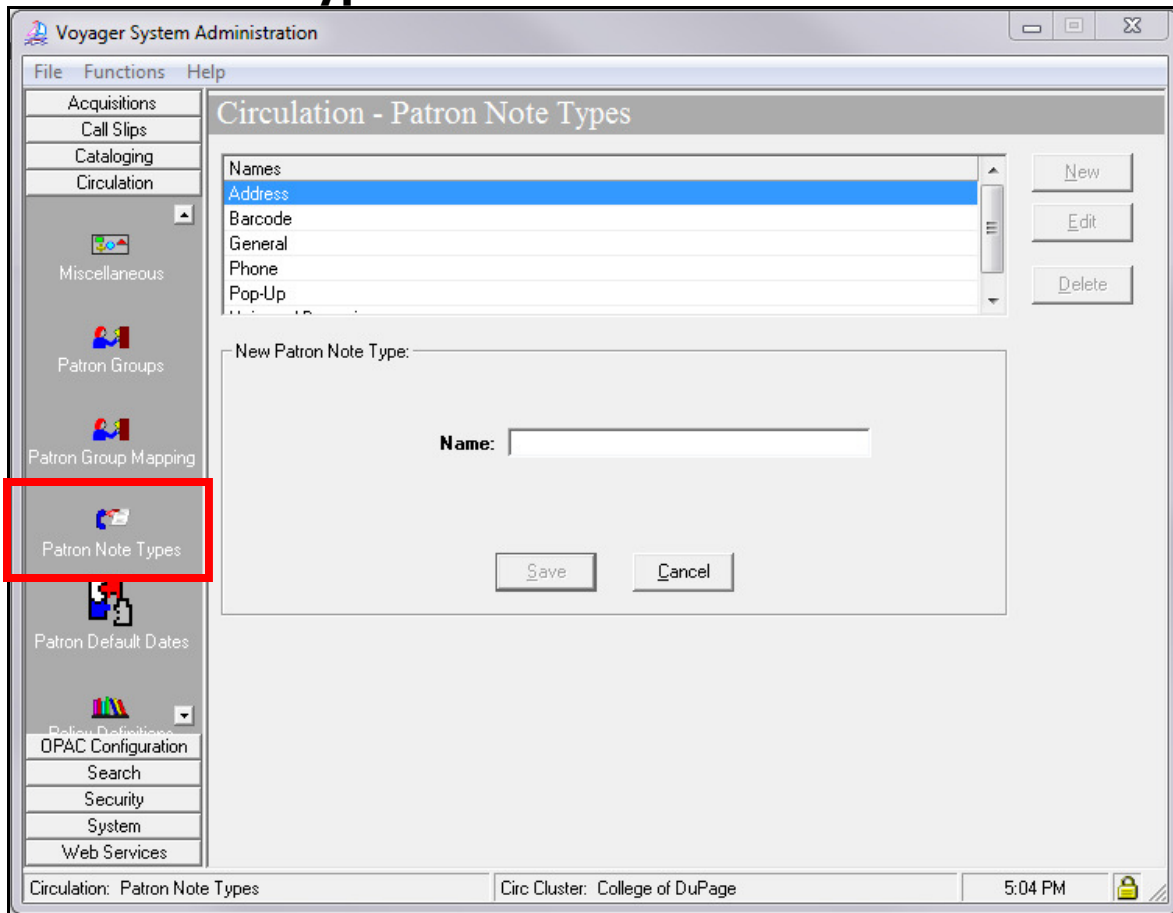


*Patron Note Type Workspace*

Libraries can define new patron note types that staff can assign to patron records in Voyager Circulation.
See *Voyager 9.1.1 System Administration User's Guide* pages 5-50 through 5-51 for more information on Patron Note Types.

Click path:

Voyager System Administration> Circulation> Patron Note Types.

Descriptions:

| ***Name:*** | [Optional] Enter the name of a new patron note type and click Save. |
|---|---|
| | This configuration option allows you to create, edit, and delete your own custom note types and to view the complete list, which includes the system-provided types of Address, Barcode, General, Phone, and Pop-Up. |
| | Any new note type added is NOT a pop-up note. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

# VIII. Patron Default Dates
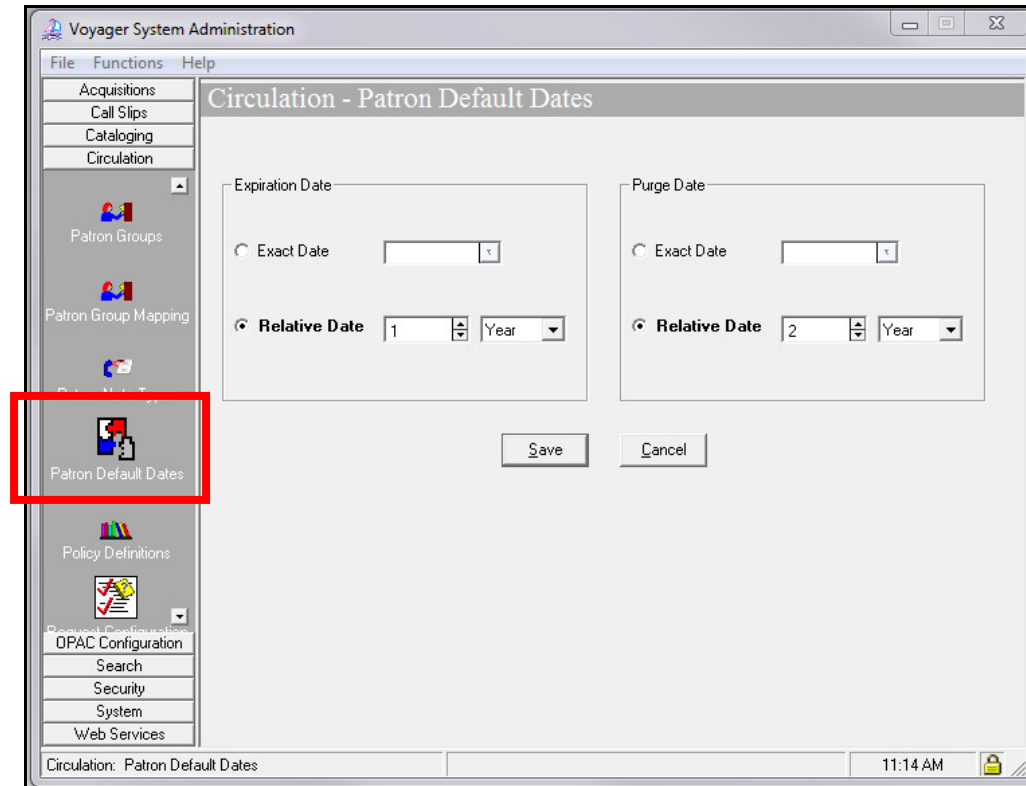


*Patron Default Dates Workspace*

The Patron Default Dates settings allow you to enter the default expiration and purge dates, which will be automatically populated for any patron record that staff add manually in the Circulation client.

> See *Voyager 9.1.1 System Administration User's Guide* pages 5-51 through 5-54 for more information on Patron Default Dates.

Click path:

> Voyager System Administration> Circulation> Patron Default Dates.

Descriptions:

| | |
|---|---|
| ☑ *Expiration Date:* | Select a radio button to enter either an Exact record expiration date, or a Relative record expiration date.<br><br>**CARLI recommends entering a Relative Date of 1 year.** |
| ☑ *Purge Date:* | Select a radio button to enter either an Exact record purge date, or a Relative record purge date.<br><br>**CARLI recommends entering a Relative Date of 2 years.** |

Legend:
 ⊕ Consortial Rule for setting value(s)
 ☑ CARLI Recommendation for setting value(s)
 ∅ Does not apply; Or, Do not change this value

# IX. Policy Definitions

Each library database (cluster) must have at least one Circulation Policy Group (aka Circulation Policy Definition), which is the set of locations and policies that are applied to its patron groups and items.

- Policy Definitions provide the rules that govern various patron group circulation activities.
- If your library has multiple circulation departments, each with its own hours and operating policies, you typically have multiple policy groups.
- See *Voyager 9.1.1 System Administration User's Guide* pages 5-54 through 5-169 for more information on the components that comprise Circulation Policy Definitions (Policy Groups).

Click path:

> Voyager System Administration> Circulation> Policy Definitions.

To add a Policy Definition:

1. Name the Circulation Policy Group.
2. Add the locations.
3. Set the policies.
4. Associate the Circulation Calendar(s).
5. Define the overall patron group Policies.
6. Associate the Item Types.
7. Create Circulation Matrices.
8. [optional] Create Short Loan Matrices. (Most I-Share libraries do not use Short Loan. Contact CARLI Support to discuss recommended settings if your library does use Short Loan.)
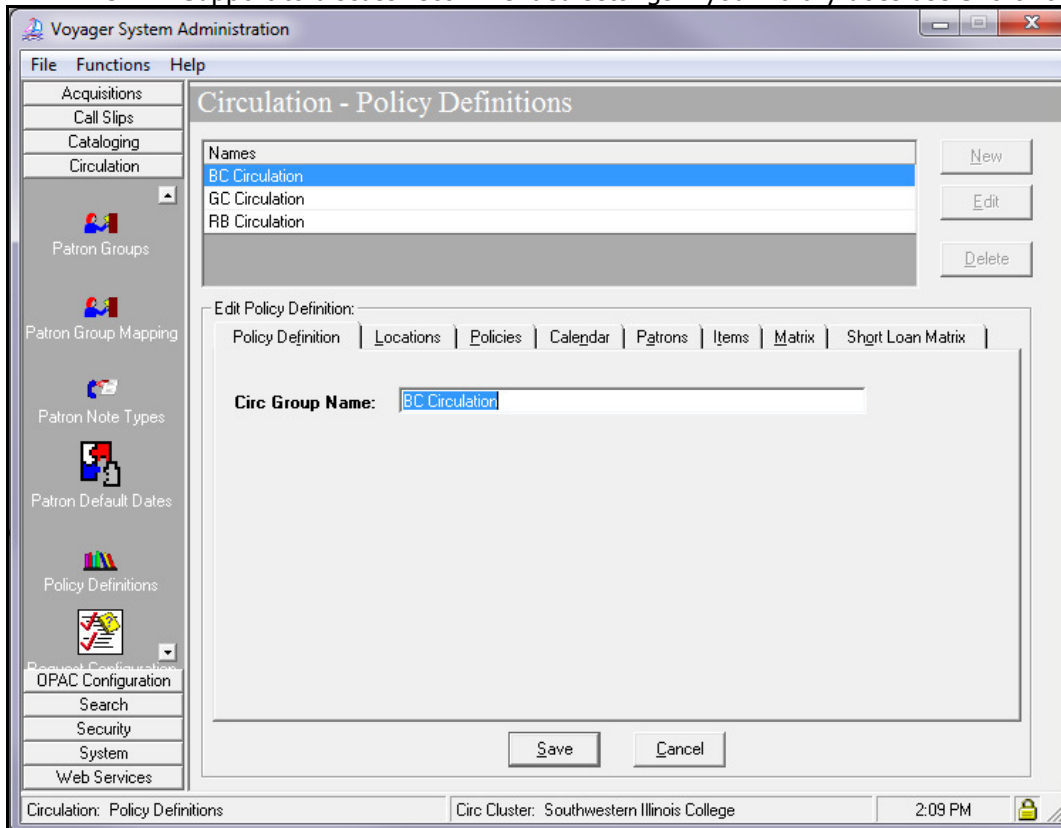


*Circulation Policy Definitions Workspace*

Legend:
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

## A. Policy Definition Tab

Choose a name that best describes the circulation unit.
- CARLI recommends that you create a separate Circulation Policy Groups (separate Circulation Policy Definitions) for reserve or departmental collections within your library IF they have their own distinct locations AND their own circulation desks, which operate on different schedules or use different notice intervals.

Descriptions:

| ☑ *Circ Group Name:* | Make the name meaningful to your library. Can be up to 40 characters. |
|---|---|

## B. Locations Tab

The locations that display on the Locations Tab are the locations that have been set up in the System Administration>System Configuration and Security settings. These locations may have been added as a part of your conversion to Voyager.
- To add a location to Voyager, read "Adding a Location in Voyager SysAdmin": http://www.carli.illinois.edu/products-services/i-share/sysadmin/secure/addlocations

A location can belong to only one Circulation Policy Group (Policy Definition).
- To choose individual locations to be Selected Locations for a Circ. Policy Group, highlight a location in the Available Locations box and click on [>].
- If all of your locations will be assigned to one Circulation Policy Group, click on [>>] to move them all to the Selected Locations box simultaneously.
- If a location contains physical items, it should be "Selected" for a Circulation Policy Group, even if library policy does not allow those items to circulate.

Descriptions:

| *Available Box:* | This list contains all locations that are not already part of any other Circ Policy Group, but that are part of the operator's Master Security Profile.<br><br>Move locations to the Selected box as desired using the arrow buttons. |
|---|---|
| *Selected Box:* | This list contains locations that belong to the Circ Policy Group currently being defined. |

Once these locations are in the Selected Location area, the locations will need further customization, especially your Circulation HAPPENING locations.

A Circulation HAPPENING location is a location where circulation transactions are performed.

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

**Highlight each location in the "Selected" column and click the "Settings" button for each location to configure the settings for your locations.**
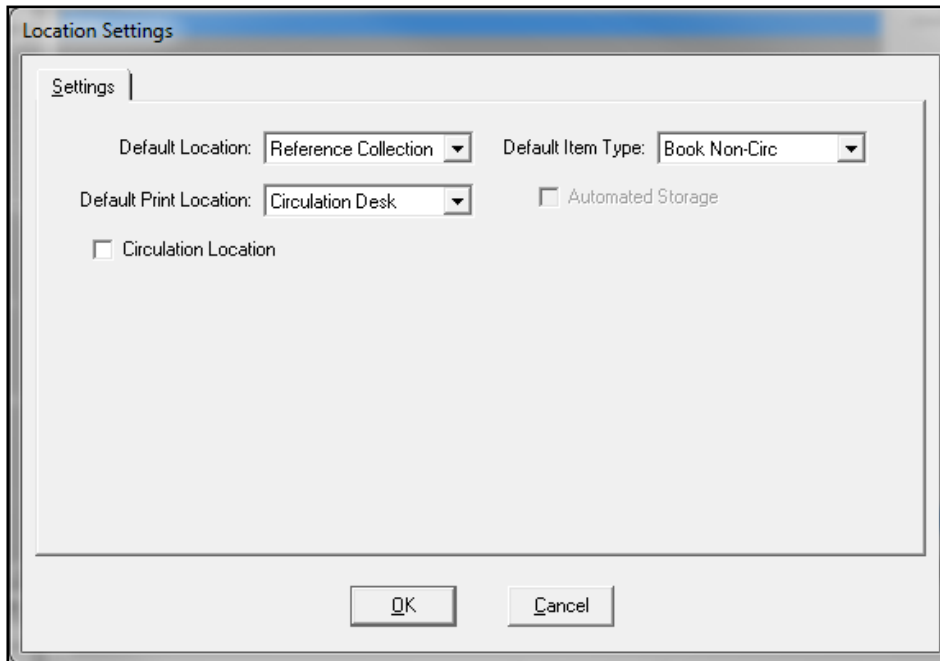


*Sample settings tab for a location that is not a Circulation HAPPENING Location*

Descriptions:

| | |
|---|---|
| ***Default Location:*** | The location used whenever an operator who works at this location creates a brief bib/holding/item record. It populates the permanent location field of the item record as a default.<br><br>**Select a location from the drop-down list.** |
| ***Default Print Location:*** | For all notices and reports, Voyager looks at the HAPPENING location in the Circ Policy group and sends the circulation desk information to its print location's input file (file that Voyager Reporter processes to generate notices and reports).<br><br>**Select the appropriate print location from the drop down list.** |
| ***Default Item Type:*** | The default item type used whenever an operator who works at this location creates an item record.<br><br>**Select an item type from the drop-down list.** |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

| Automated Storage: | [Optional] Only active if your library uses an ARS/Remote Storage extension product with Voyager.<br>• Check this box only if this location in your library interfaces with an Automated Storage Facility. |
|---|---|
| ⊕ Circulation Location: | Check this box if the location is a HAPPENING Location at which circulation transactions actually happen.<br>• If this box is checked, a "(c)" appears next to this location in the Selected Locations list.<br><br>You must have at least one location defined as a circulation HAPPENING Location for each circulation policy group.<br>• Additional setup options for Circulation HAPPENING locations follow. |

**Settings Tab for CIRC HAPPENING Locations**

Once you check the Circulation Location box, the location becomes a HAPPENING location. Additional check boxes that govern rules for that circulation location will display and the Alerts tab becomes available.

The screen below shows a sample definition for a HAPPENING Location.



*Settings tab for a Circulation HAPPENING Location*

Legend:
   ⊕ Consortial Rule for setting value(s)
   ☑ CARLI Recommendation for setting value(s)
   ∅ Does not apply; Or, Do not change this value

Descriptions:

| | |
|---|---|
| ☑ *Collect Fines:* | [Optional] Check this box if an authorized operator at this location can accept payments.<br>• **If your library charges fines/fees, check this box for at least one Circ HAPPENING location.**<br>• If you collect fines outside the library (such as via a Bursar transfer) but record them in the library, you should check this box. |
| ⊕ *Courtesy Discharge:* | Check this box if you want to be able to discharge an item at a location other than the one at which it was originally charged.<br>• This is required to enable the discharge of UB items.<br><br>**Check this box.** |
| ☑ *OPAC Suppress For Items On The Fly:* | When checked, if an operator creates a brief bibliographic, holdings (MFHD), or item record at this location, that record will not display in the public catalogs.<br><br>**If this location is a Reserve Location, the consortial recommendation is to check this box to suppress OPAC display of on-the-fly records created for Reserves, such as for professors' copies, photocopied articles, notes, etc.** |
| ☑ *Due Date Slip Print:* | Select the default setting for when Due Date slips will print for the patron.<br><br>**Select the radio button appropriate for this Circ HAPPENING location.**<br>Options are:<br>• No Due Date Slip<br>• Per Single Charge<br>• All Charges in One Receipt<br>Additional documentation is available here:<br>http://www.carli.illinois.edu/products-services/i-share/circ/secure/duedateslips<br><br>You can override the default in the Circulation client> Options> Session Preferences, as needed for specific transactions. |
| ⊕ *Hold Slip Print:* | When checked, Hold Slips print at this location.<br>• This is required for UB requests.<br><br>**Check this box.** |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ⊕ *Routing Slip Print:* | When checked, Route slips print for any item that needs to be sent to another location.<br>• This is required for UB requests and Call Slip.<br><br>**Check this box.** |
| ☑ *Discharge Receipt Print:* | Check this box if you want to print discharge receipt slips for patrons.<br><br>**CARLI recommends leave this box unchecked.**<br><br>You can override the default in the Circulation client> Options> Session Preferences, as needed for specific transactions. |
| ☑ *Payment Receipt Print:* | Check this box if you want receipts to print for payment transactions.<br><br>**CARLI recommends leave this box unchecked.**<br><br>You can override the default in the Circulation client> Options> Session Preferences, as needed for specific transactions. |
| ⊕ *Pick Up Location:* | Check this box if the location will serve as a pick up location for patrons' requests. This location will display in a menu of possible pick up "desks" on request forms in the OPAC.<br><br>**Every library will need to designate at least one Circulation HAPPENING Location to be a pickup location.** |
| ☑ *Shelving Interval:* | This is the number of days/hours/minutes it typically takes for an item discharged at this location to be reshelved. Enter values between 0-999. A "0" signifies that items are available immediately.<br><br>• **Small or departmental libraries that quickly re-shelve items should set the Shelving Interval to 0 (zero).**<br>   o Immediately upon discharge, the OPAC will display the item as available: Status = "Not Charged."<br><br>• **Larger libraries, where it might take hours or days to reshelve an item, should set a longer Shelving Interval.**<br>   o When library staff discharge and item and the Shelving Interval is greater than 0 (zero), Voyager sets the item's status to "Discharged."<br>   o Two things must then occur to set the item status to "Not Charged": the time specified in the Shelving Interval must pass and CARLI must run a circ job to apply the status change. CARLI runs the job overnight. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

| ⊕ *In Transit Interval:* | Maximum average number of days it takes to route an item to another location. |
|---|---|
| | When an item has had an "In Transit" status for more than the In Transit Interval, the item will appear on the "Missing in Transit" report. |
| | **Set to 21 days.** |
| ⊕ *Hold Life:* | Number of days the system keeps a hold request active before it cancels the unfilled request.<br>• UB Routing will not work if this is set at 0 [Zero]. |
| | **Set to 30 days to allow for transport time from one library to another via ILDS.** |
| *Recall Life:* | Number of days the system keeps a recall request active before it cancels the unfilled request. |
| | **Set as appropriate for your library's policies.** |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

**Alerts tab**
Decide which alerts you want to display at discharge and how you want them to display.
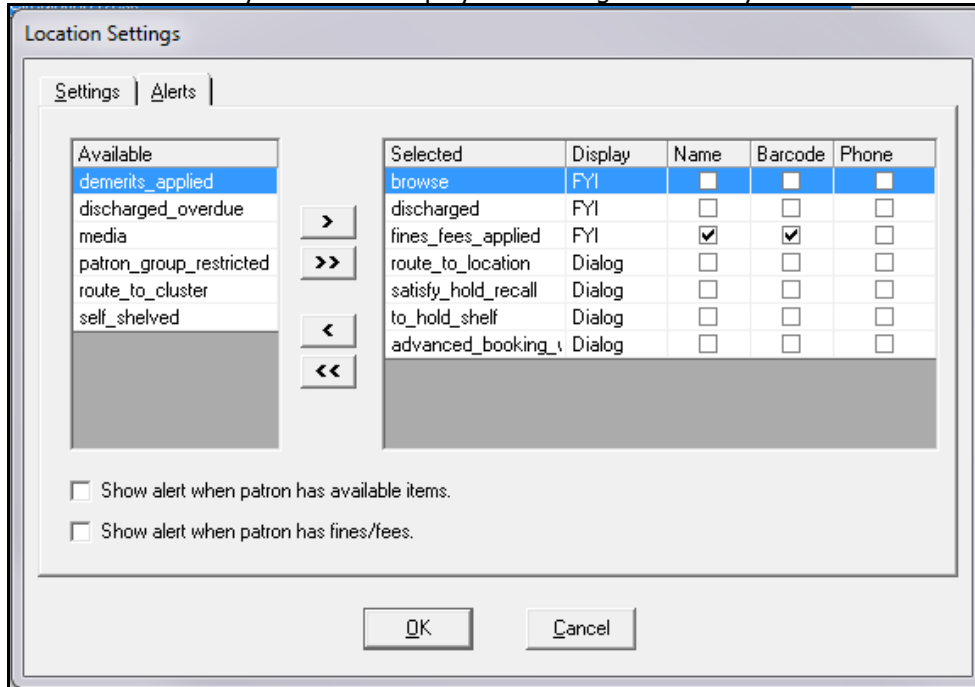


*The Alerts tab for a location in System Administration*

Use the figure above and the questions below to guide your decisions about alert configuration:
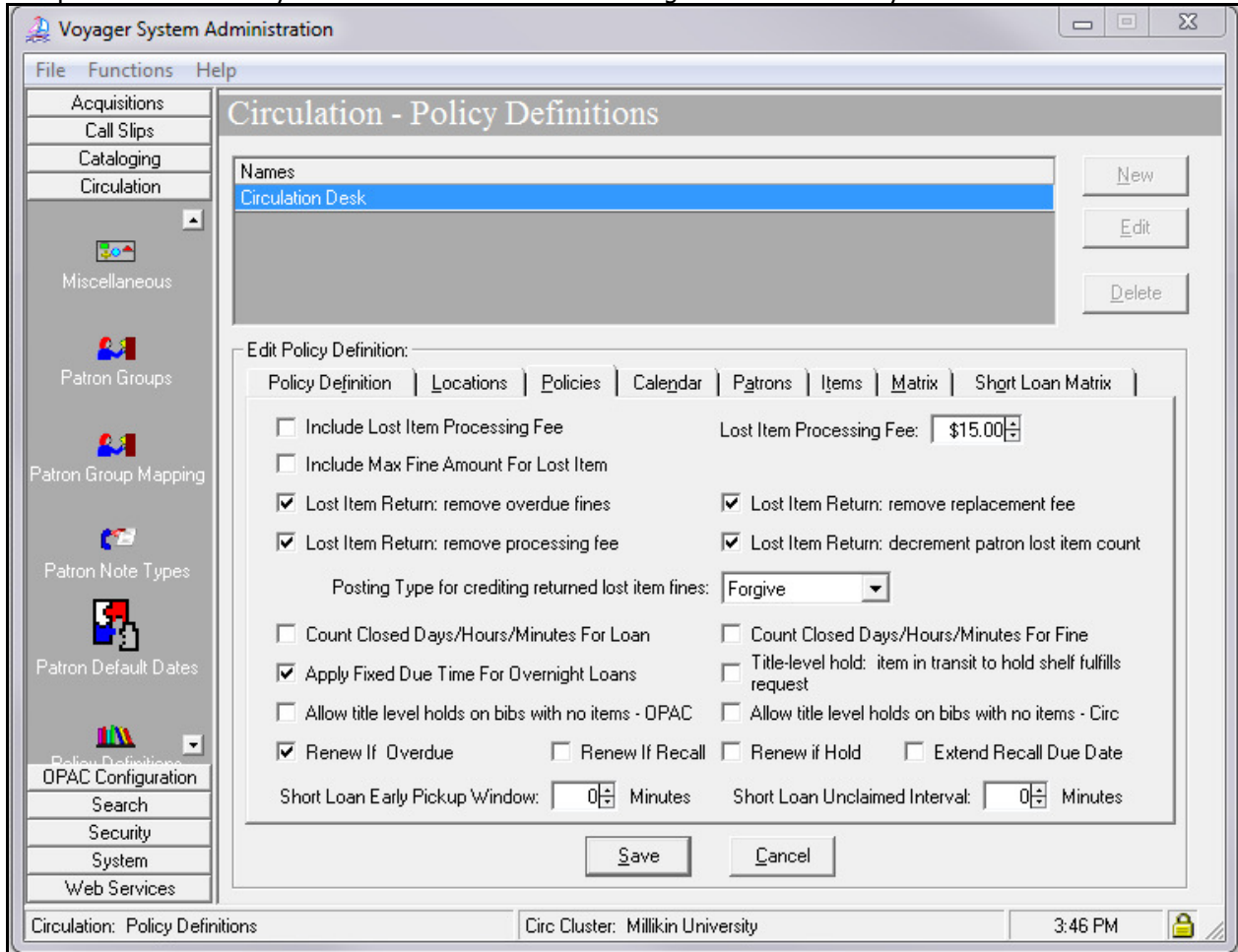- Which alerts do you want to display in circulation?
  - Read about each alert on pages 5-164 and 5-168 in the *Voyager 9.1.1 System Administration User's Guide*.
  - **CARLI recommends libraries select (at least) these 5 alerts**:
    - browse
    - discharged
    - route_to_location
    - satisfy_hold_recall
    - to_hold_shelf
  - Use the arrow to move a desired alert to the "Selected" side.
- For each alert, do you want a pop-up dialog box or just a display in the FYI column of the Discharge window? Selecting "Dialog" [pop-up] stops all circulation processing; operators must click OK to continue.
  - Choose either FYI or Dialog for each alert.
- What information do you want to display with the alert?
  - Options are patron name, barcode, and/or phone.
  - Set the default here. You can override these settings for the session in the Circ client Options> Session Preferences.
- Do you want to see pop-up alerts when the patron has s available items and/or the fines/fees?
  - Check these checkboxes if desired.
  - Set the default here. You can override these settings for the session in the Circ client Options> Session Preferences.

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

## C. Policies

The policies tab allows you to choose some overall settings for the Circ Policy Definition.



*Circulation Policies Tab Workspace*

Descriptions:

| Include Lost Item Processing Fee: | [Optional] When checked this means that a bill for a lost item will always include the processing fee. |
|---|---|
| Lost Item Processing Fee: | [Optional] If your library has checked the box for "Include Lost Item Processing Fee", this is the fee amount the bill will include. <br><br> Voyager adds this amount to the patron's account along with the Lost Item Replacement Fees and applicable Overdue fines. |

Legend:
  ⊕ Consortial Rule for setting value(s)
  ☑ CARLI Recommendation for setting value(s)
  ∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ***Include Max Fine Amount for Lost Item:*** | [Optional] If your library charges a maximum overdue fine on a lost item, check this box; you will set the maximum fine amount in the Matrix entries. When the item becomes "lost", Voyager will charge the patron this maximum fine amount as an overdue fine.<br>• If you check this option and have set the Max Fine Amount in the matrix entry to $0.00, any accumulated overdue fines reset to $0.00 when an overdue item is updated to the "Lost-System Applied" status. |

The five following Lost Item Return policy settings allow authorized circ operators the opportunity to adjust a patron's fines, fees, and the lost item counter automatically when a lost item is returned.



• For these settings, consider your library's policies as a whole, not a specific library staff member's tasks.
• Additional SysAdmin Security settings allow you to configure which specific Circ Operators have the ability to perform these tasks at the time of discharge.
• The screenshot (left) from Voyager Circulation shows what circ operators would see when discharging a lost item, if all of the Lost Item Return policy and security settings are enabled for them.
• Lost items should be processed following the Best Practices for Lost Items: http://www.carli.illinois.edu/products-services/i-share/circ/secure/bp-LostItem

| | |
|---|---|
| ☑ ***Lost Item Return: remove overdue fines*** | Allows circ operators with appropriate security permissions the opportunity to remove overdue fines from lost items at the time of discharge.<br><br>**CARLI recommends that you check this box.** |
| ☑ ***Lost Item Return: remove replacement fee*** | Allows circ operators with appropriate security permissions the opportunity to remove replacement fees from lost items at the time of discharge.<br><br>**CARLI recommends that you check this box.** |
| ☑ ***Lost Item Return: remove processing fee*** | Allows circ operators with appropriate security permissions the opportunity to remove processing fees from lost items at the time of discharge.<br><br>**CARLI recommends that you check this box.** |
| ☑ ***Lost Item Return: decrement patron lost item count*** | Allows circ operators with appropriate security permissions the opportunity to decrement the patron's lost item counter at the time of discharge.<br><br>**CARLI recommends that you check this box.** |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ☑ *Posting Type for crediting returned lost item fines:* | Select the posting type you prefer for crediting returned lost item fines with the "Lost Item Return" settings.<br><br>**CARLI recommends the setting "Forgive."** |
| ☑ *Count Closed...for Loan:* | [Optional] Check this box if you want to include closed library days as part of the normal loan and date due period.<br>• If you leave the box unchecked, an item will not fall due on a day the library is closed.<br>• This box also affects the calculation of hourly and minutely loan periods.<br><br>**CARLI recommends leave this box unchecked.** |
| ☑ *Count Closed...for Fine:* | [Optional] Check this box if you want calculated overdue fines to include closed days in the current calendar.<br>• If you leave the box unchecked, calculated overdue fines will not include days closed.<br><br>**CARLI recommends leave this box unchecked.** |
| *Apply Fixed Due Time for Overnight Loans:* | [Optional] When checked, this activates the fixed due times and effective times that your library set up in the associated Circulation Calendar (pages 5-6 of this document). |
| ☑ **Title-level hold: item in transit to hold shelf fulfills request** | If you enable title level holds for your library in Request Configuration (page 64 of this document):<br><br>**CARLI recommends that you check this box.** |
| ∅ **Allow title level holds on bibs with no items - OPAC** | Does not apply in the I-Share environment. Only library staff are able to place holds on items for patrons in the Circulation client.<br>• This checkbox is checked by default since release 9.1.1. This setting does not apply in I-Share libraries, you can check or uncheck the box. |
| **Allow title level holds on bibs with no items - Circ** | [Optional] This checkbox is checked by default since release 9.1.1. Check or uncheck the box according to your library's workflows.<br><br>Examples of when this setting might be useful:<br>• Do you want to place an advance hold request for an "on order" title?<br>• Do you want to place a hold on titles that do not receive item records, such as periodicals or microforms? |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

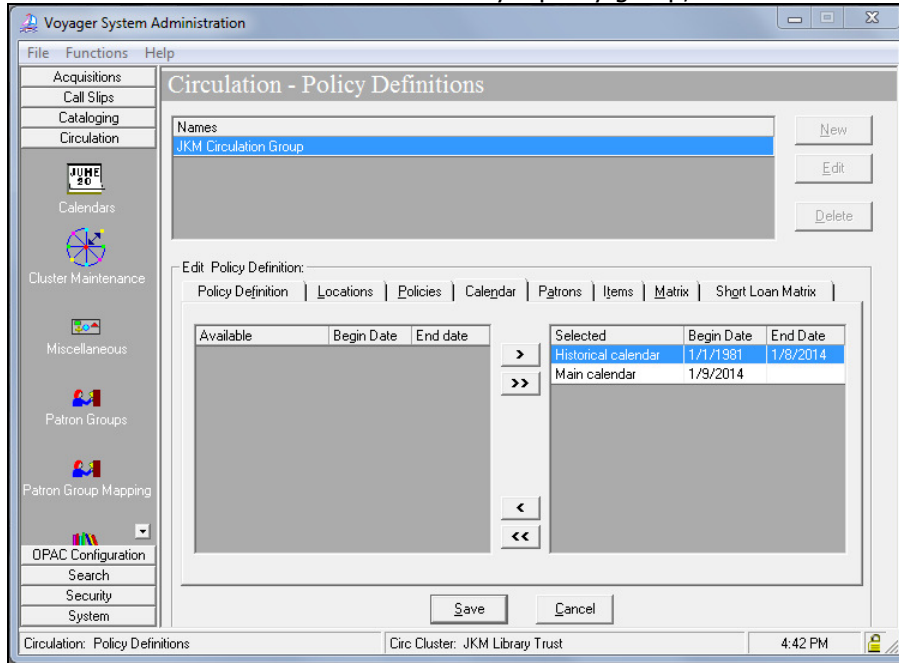| | |
|---|---|
| ⊕ *Renew if Overdue:* | Checking this box will allow a patron to renew an overdue item.<br><br>**Check this box.** |
| ⊕ *Renew if Recall:* | Checking this box will allow a patron to renew an item even if another patron has an active recall request on that item.<br><br>**Leave this box unchecked.** |
| ☑ *Renew if Hold:* | Checking this box will allow a patron to renew an item even if another patron has active hold request on that item.<br><br>**CARLI recommends leave this box unchecked.** |
| ☑ *Extend Recall Due Date:* | Checking this box allows a recalled item to be set with a due date beyond the original due date. This works in conjunction with a value set in the Matrix tab. A software bug affects the calculation of the recall due date when this checkbox is checked.<br><br>**CARLI recommends leave this box unchecked.** |
| ∅ *Short Loan Early Pickup Window:* | Most I-Share libraries do not use Short Loan.<br><br>Contact CARLI Support to discuss recommended settings if your library does use Short Loan. |
| ∅ *Short Loan Unclaimed Interval:* | Most I-Share libraries do not use Short Loan.<br><br>Contact CARLI Support to discuss recommended settings if your library does use Short Loan. |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

## D. Calendar

The Calendar Tab is where you assign the calendars you created in SysAdmin> Circulation> Calendars (pages 3 through 8 of this document) to the appropriate Circulation Policy Definition(s).

- Multiple Circulation Policy Definitions may use the same calendar.
- Voyager discharges an item using the same calendar it used to charge the item.
- Every circulation statistic remains tied to its associated calendar.
- Once a calendar has been used by a policy group, DO NOT deselect or delete that calendar.



*Circulation Calendar Tab Workspace*

Descriptions:

| **Available pane:** | The list of available calendars that were previously defined in SysAdmin> Circulation> Calendars (pages 3-8 of this document), that are not selected for this Circulation Policy Group. |
|---|---|
| **Selected pane:** | The list of calendars that have been selected for this Policy Group. At least one calendar must be associated with the Circulation Policy Group.<br>• Multiple Circulation Policy Groups can share the same calendar.<br>• You may choose more than one calendar provided the calendar dates do not overlap.<br>• Voyager requires calendar(s) with historical dates for discharge transactions.<br><br>**Choose the appropriate calendar(s) in the Available pane and use the arrows to move to the Selected pane to activate.** |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

### E. Patrons

The Patron Group Names that appear in the Patron Group workspace are those that you previously defined in the Circulation>Patron Groups area of System Administration (pages 12 through 15 of this document).

**Enter settings for each of your patron groups, including a default [all] setting.**
Voyager uses the [all] settings if there are no other specific settings for a patron group.
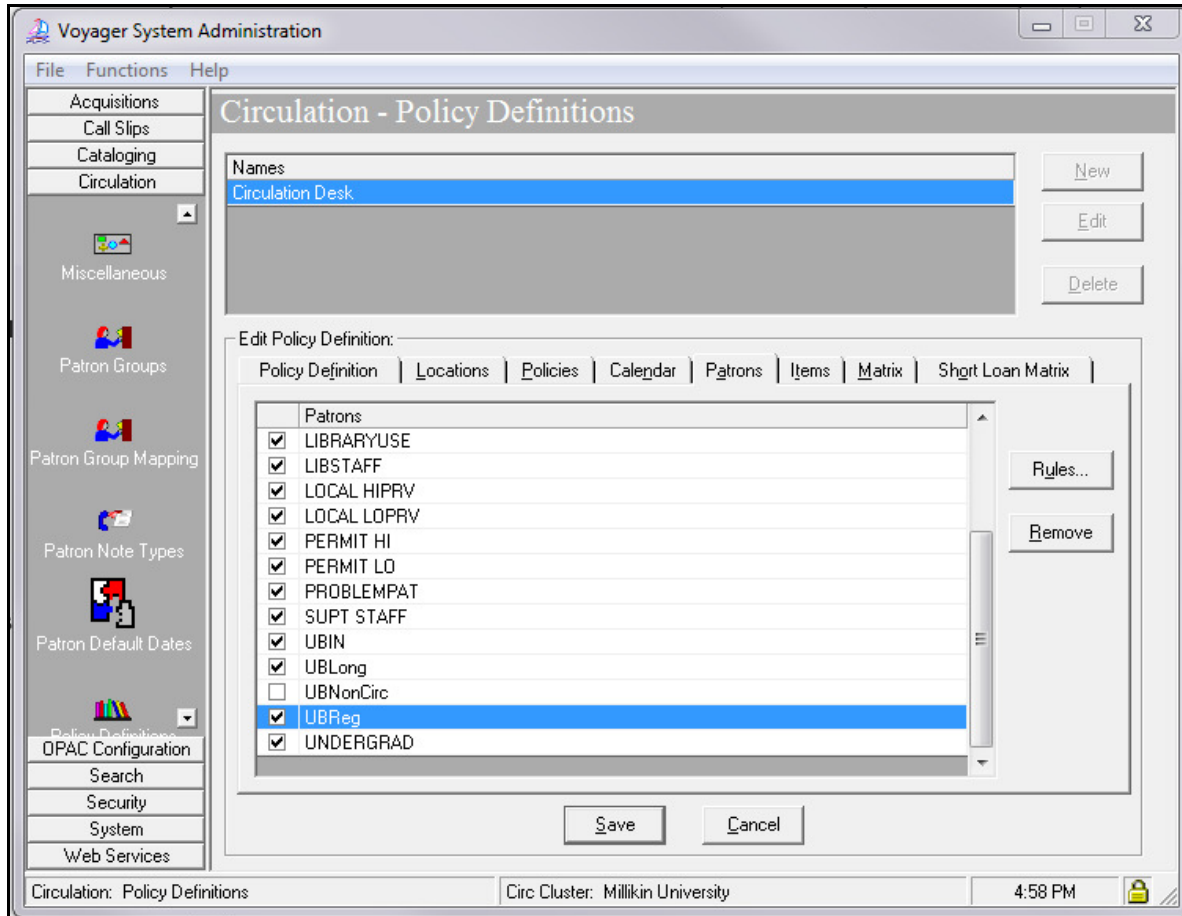


*Patron Tab Workspace*

Notes:
1.  On the Patrons tab, a check in the checkbox next to the patron group indicates that Voyager has stored some settings. It is possible to save to the database with no information added, effectively storing zeroes/blanks as the settings.
2.  Values entered under the Patron tab determine what policies and privileges are in effect when patrons of a patron group borrow an item of any item type from a location in the selected Circulation Policy Group.

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value
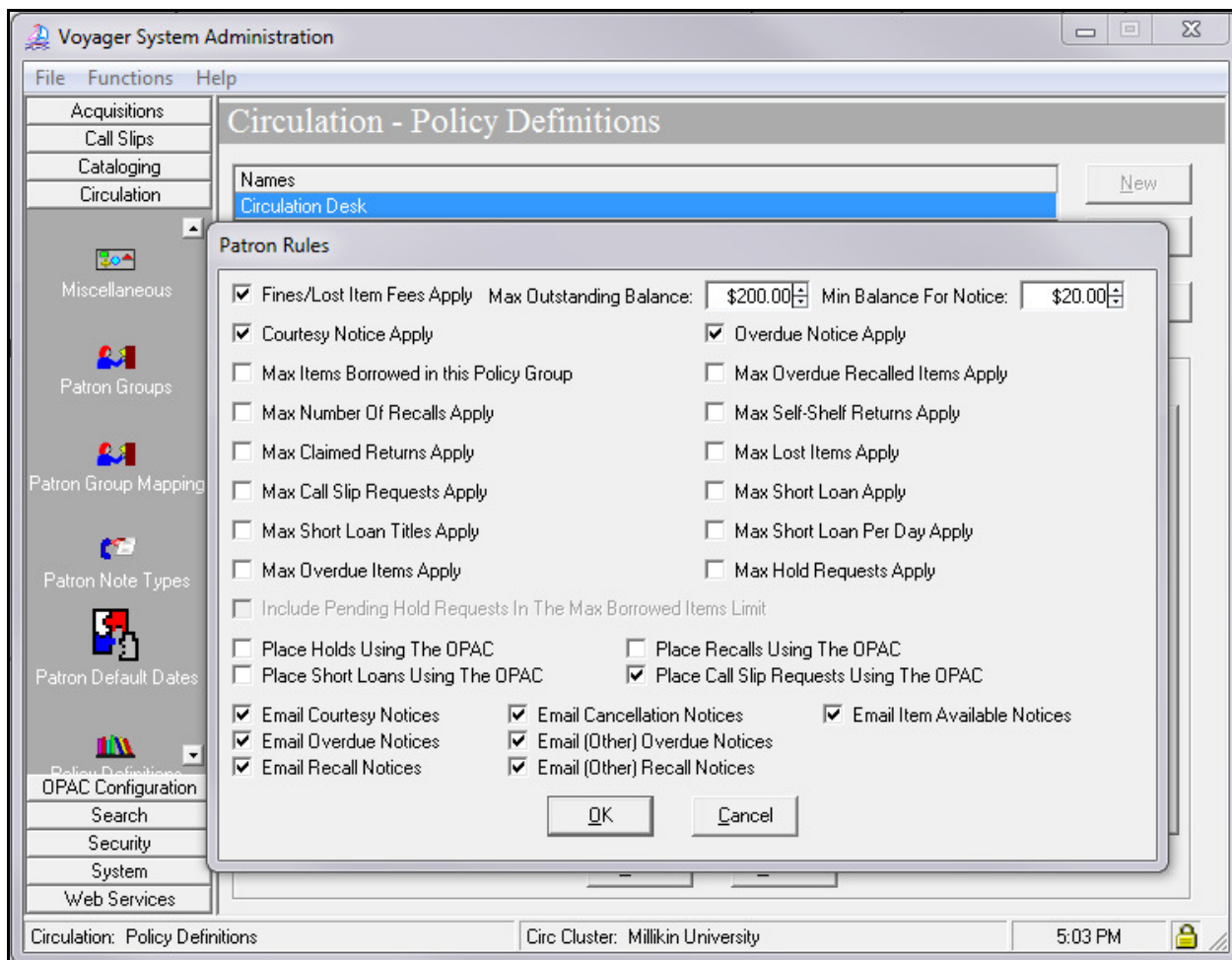
*Circulation Patrons tab and the Patron Rules dialog box*

Notes:
1. In order for Universal Borrowing to work consistently throughout the I-Share consortium, configuration of the policies for the UB Patron Groups should follow the UB Standard Policy: http://www.carli.illinois.edu/products-services/i-share/circ/UBStandardChart.
The UB Standard Policy settings apply to the groups UBLong, UBReg, UBIN, and UBNonCirc.
2. You may choose the values for your local patrons.
3. Due to a known bug, you must enable Item Available Notices for all of your patrons, or for none of your patrons.
The "Email Item Available Notices" checkbox is located in SysAdmin> Circulation> Policy Definitions> [select policy definition]> [click Edit]> Patrons Tab> (all) patron group.

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

Descriptions:

| | |
|---|---|
| ⊕ *Fines/Lost Item Fees Apply:* | Check this box if patrons in this patron group will be liable for overdue fines/lost item fees for at least one Item type.<br>• Settings in the Matrix tab will determine the specific item types for which this patron group is liable for fines/fees.<br><br>**UB:** Check for UB patron groups, unless your library does not charge fines/fees to UB patrons.<br><br>**Local:** Set as appropriate for local patron groups. |
| ⊕ *Max Outstanding Balance:* | If you check the *Fines/Lost Item Fees Apply* box, the system requires you to enter the total amount of fines/fees that patrons of this group can accrue before the system blocks their circulation transactions**.**<br>• Valid values are from 0.01 to 9999.99.<br>• A value of '0' prevents circulation transactions for the patron group.<br><br>**UB:** Set at $200.00 for UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. Must be greater than 0.<br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |
| ⊕ *Min Balance for Notice:* | If you check the *Fines/Lost Item Fees Apply* box, the system requires you to enter the minimum value of outstanding fines/fees that can accrue before Voyager generates a bill for the patron.<br>• Valid values are from 0.01 to 999.99**.**<br><br>**UB:** Set at $20.00 for UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. |
| ⊕ *Courtesy Notices Apply:* | When checked, Voyager generates a courtesy notice for the patron at the specified interval before the item's due date. You can specify the courtesy interval in the Matrix entry.<br><br>**UB:** Check for UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. Recommended. |

Legend:
  ⊕ Consortial Rule for setting value(s)
  ☑ CARLI Recommendation for setting value(s)
  ∅ Does not apply; Or, Do not change this value

| ⊕ *Overdue Notices Apply:* | When checked, Voyager generates an overdue notice for the patron at the specified interval after the item's due date. You can specify the overdue interval in the matrix entry.<br><br>**UB:** Check for UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. Recommended. |
|---|---|

The following "Max" options establish limits that will block a patron from circulation and OPAC requesting privileges for the locations included in this circulation policy group.
- Leave boxes unchecked for those settings that have no limit. If you leave a setting unchecked, the limit does not apply.
- Setting a value at '0' may have a detrimental effect on the patron group's borrowing privileges.

Consult pages 5-74 through 5-81 in the *Voyager 9.1.1 System Administration User's Guide* carefully.

Descriptions:

| ☑ *Max Items Borrowed in this Policy Group:* | [Optional] Check this box if you want to limit the total number of items a patron of this patron group can have checked out from this policy group before being blocked by the system.<br>• Most I-Share libraries do not limit the number of items patrons may borrow.<br><br>**UB:** CARLI recommends do NOT check this box for the UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. |
|---|---|
| ☑ *Max Items Borrowed in this Policy Group value:* | [Optional] If you check *Max Items Borrowed in this Policy Group*, the system requires you to specify the number at which the system will block patrons associated with this patron group from further activity.<br>• Most I-Share libraries do not limit the number of items patrons may borrow.<br><br>**UB:** CARLI recommends no limits for the UB patron groups. If you must set limits, set the UB groups the same their "model" local groups (e.g., UBReg=UG; UBLong=FC, UBIN=UG)<br><br>**Local:** Set as appropriate for local patron groups. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ***Max Overdue Recalled Items Apply:*** | [Optional] When checked, this limits the total number of overdue recalled items the patron may have at one time.<br><br>**UB:** CARLI recommends that you not set a limit for the UB patron groups in your local database. The UB Standard policy already blocks patrons from further circulation activity at 1 overdue recalled item anywhere in the consortium.<br><br>**Local:** Set as appropriate for local patron groups.<br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |
| ***Max Overdue Recalled Items value:*** | [Optional] If you check the *Max Overdue Recalled Items Apply* box, the system requires you to enter the number of overdue recalled items at which the system will block patrons associated with this patron group.<br>• Valid numbers are 1-999 and the number must be equal to or less than the number entered in the *Max Items Borrowed* box above.<br><br>**UB:** CARLI recommends that you not set a limit for the UB patron groups in your local database. The UB Standard policy already blocks patrons from further circulation activity at 1 overdue recalled item anywhere in the consortium.<br><br>**Local:** Set as appropriate for local patron groups.<br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |
| ☑ ***Max Number of Recalls Apply:*** | Check this box if you want to limit the number of pending recall requests a patron can have at any one time.<br>• Library staff place recalls in the Circulation client.<br>• This setting does not prevent only additional recall requests from being placed; when patrons reach their patron group's limit, they are blocked from all circulation activity.<br><br>**UB/Local:** CARLI recommends that you do NOT check this box for the UB or local patron groups. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

| ☑ *Max Number of Recalls value:* | If you check the *Max Number of Recalls Apply* box, the system requires you to enter the maximum number of pending recall requests a patron may have. <br>• Library staff place recalls in the Circulation client. <br>• A patron who reaches this limit will be unable to conduct any circulation transactions. <br><br>**UB/Local:** CARLI recommends that you do NOT enter a value for the UB or local patron groups. |
|---|---|
| *Max Self-Shelve Returns Apply:* | [Optional] Check this box if you want to limit the number of self-shelves a patron can accumulate. A self-shelved item is one that somehow did not get discharged from one patron before it was charged to a second patron. The assumption is that the first patron returned the item improperly, bypassing the circulation desk. <br><br>**UB:** CARLI recommends that you not set a limit for the UB patron groups in your local database. The UB Standard policy already blocks patrons from further circulation activity at 10 self-shelved items anywhere in the consortium. <br><br>**Local:** Set as appropriate for local patron groups. <br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |

Legend:
  ⊕ Consortial Rule for setting value(s)
  ☑ CARLI Recommendation for setting value(s)
  ∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ***Max Self-Shelve Returns value:*** | If you check the Max Self-Shelf Returns Apply box, the system requires you to enter the number at which patrons associated with this group would be blocked from further activity.<br>• Valid numbers are 1-999.<br>• Library staff must decrement this counter manually in Voyager Circulation.<br>• See the *Voyager Circulation User's Guide* for more information.<br><br>**UB:** CARLI recommends that you not set a limit for the UB patron groups in your local database. The UB Standard policy already blocks patrons from further circulation activity at 10 self-shelved items anywhere in the consortium.<br><br>**Local:** Set as appropriate for local patron groups.<br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |
| ***Max Claimed Returns Apply:*** | [Optional] Check this box if you want to limit the number of claimed returns a patron can accumulate before being blocked from further activity.<br><br>**UB:** CARLI recommends that you not set a limit for the UB patron groups in your local database. The UB Standard policy already blocks patrons from further circulation activity at 10 claimed returned items anywhere in the consortium.<br><br>**Local:** Set as appropriate for local patron groups.<br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ***Max Claimed Returns value:*** | [Optional] If you check the Max Claimed Returns Apply box, the system requires you to enter the maximum number of claimed returns allowed to a patron of this type.<br>• This number displays as a counter in the patron record and in OPAC block messages.<br>• Valid numbers are 1-999.<br>• When a staff member adds the item status of Claims Returned to an item, the system increments this counter by one.<br>• Library staff must decrement this counter manually in Voyager Circulation.<br>• See the *Voyager Circulation User's Guide* for more information.<br><br>**UB:** CARLI recommends that you not set a limit for the UB patron groups in your local database. The UB Standard policy already blocks patrons from further circulation activity at 10 claimed returned items anywhere in the consortium.<br><br>**Local:** Set as appropriate for local patron groups.<br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |
| ☑ ***Max Lost Items Apply:*** | [Optional] Check this box if you want to limit the number of lost items a patron can have before being blocked from further activity.<br><br>**UB:** CARLI recommends that you not set a limit for the UB patron groups in your local database. The UB Standard policy already blocks patrons from further circulation activity at 3 lost items anywhere in the consortium.<br><br>**Local:** Set as appropriate for local patron groups.<br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

| ☑ *Max Lost Items value:* | [Optional] If you check the *Max Lost Items Apply* box, the system requires you to enter the maximum number of lost items allowed for a patron of this type. When the system processes a lost item or when a staff member adds the status of LOST to an item, the system increments the lost item counter by one.<br>• Valid numbers are 1-999.<br>• Staff often must decrement the counter manually in Voyager Circulation.<br>• See the *Voyager Circulation User's Guide* for more information.<br><br>**UB:** CARLI recommends that you not set a limit for the UB patron groups in your local database. The UB Standard policy already blocks patrons from further circulation activity at 3 lost items anywhere in the consortium.<br><br>**Local:** Set as appropriate for local patron groups.<br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |
|---|---|
| ☑ *Max Call Slip Requests Apply:* | Check this box if you want to limit the number of call slip requests a patron can submit before being blocked from further submissions.<br>• Most I-Share libraries do not limit the number of call slips patrons can submit.<br><br>**UB/Local:** CARLI recommends that you do not check this box for the UB or local patron groups. |
| ☑ *Max Call Slip Requests value:* | If you check the *Max Call Slip Requests Apply* box, enter the number after which the system should block further call slip requests.<br>• Each call slip request increments the counter by one.<br>• When staff process a call slip or when a call slip expires, the counter decrements automatically.<br>• 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.<br><br>**UB/Local:** CARLI recommends that you do not check this box for the UB or local patron groups. |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

| ∅ *Max Short Loans Apply:* | **Most I-Share libraries do not use Short Loan. Do not check.** |
|---|---|
| | Contact CARLI Support to discuss recommended settings if your library does use Short Loan. |
| ∅ *Max Short Loans Apply value:* | **Most I-Share libraries do not use Short Loan. Do not enter a value.** |
| | Contact CARLI Support to discuss recommended settings if your library does use Short Loan. |
| ∅ *Max Short Loan Titles Apply:* | **Most I-Share libraries do not use Short Loan. Do not check.** |
| | Contact CARLI Support to discuss recommended settings if your library does use Short Loan. |
| ∅ *Max Short Loan Titles Apply value:* | **Most I-Share libraries do not use Short Loan. Do not enter a value.** |
| | Contact CARLI Support to discuss recommended settings if your library does use Short Loan. |
| ∅ *Max Short Loans Per Day Apply:* | **Most I-Share libraries do not use Short Loan. Do not check.** |
| | Contact CARLI Support to discuss recommended settings if your library does use Short Loan. |
| ∅ *Max Short Loans Per Day Apply value:* | **Most I-Share libraries do not use Short Loan. Do not enter a value.** |
| | Contact CARLI Support to discuss recommended settings if your library does use Short Loan. |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

| ☑ *Max Overdue Items Apply:* | Check this box if you want to limit the number of overdue items a patron in this group can have at any one time.<br><br>**UB:** CARLI recommends that you not set a limit for the UB patron groups in your local database. The UB Standard policy already blocks patrons from further circulation activity at 25 overdue items anywhere in the consortium.<br><br>**Local:** Set as appropriate for local patron groups.<br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |
|---|---|
| ☑ *Max Overdue Items:* | If you check the *Max Overdue Items Apply* box, enter the maximum number of overdue items patrons in this group can have.<br>• Valid numbers are 1-999 and the number must be equal to or less than the number you enter in the *Max Items Borrowed* box above.<br><br>**UB:** CARLI recommends that you not set a limit for the UB patron groups in your local database. The UB Standard policy already blocks patrons from further circulation activity at 25 overdue items anywhere in the consortium.<br><br>**Local:** Set as appropriate for local patron groups.<br>• You can choose to block your library's patrons from further circulation activity at your library if they have reached a consortial block threshold. To do so, enable "Block Local Transactions" in the UB Policy Definition (see page 66 of this document). |
| ☑ *Max Hold Requests Apply:* | Check this box if you want to limit the number of pending hold requests a patron can have at any one time before being blocked from any further activity.<br>• Library staff place holds in the Circulation client; holds resulting from UB requests are not included in the count.<br>• This setting does not prevent just additional hold requests from being placed; when patrons reach their patron group's limit, they are blocked from all circulation activity.<br><br>**UB/Local:** CARLI recommends that you do not check this box for the UB or local patron groups. |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

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|---|---|
| ☑ *Max Hold Requests Apply value:* | If you check the *Max Number of Hold Requests Apply* box, the system requires that you enter the limiting number of pending holds a patron may have.<br>• A patron that reaches this limit will be unable to conduct additional circulation transactions.<br><br>**UB/Local:** CARLI recommends that you do not enter a value for the UB or local patron groups. |
| ☑ *Include Pending Hold Requests In The Max Borrowed Items Limit* | Select this check box to count the patron's hold requests toward their limit of borrowed (charged) items.<br>• When the combination of hold requests and charged items reaches the Max Borrowed Items Limit, the patron is blocked from additional borrowing.<br>• This option is only available when you have checked the "Max Items Borrowed" in this Policy Group.<br><br>**UB/Local:** CARLI recommends that you do not check this box for the UB or local patron groups. |
| ⊕ *Place Holds Using the OPAC:* | When checked, patrons in this patron group can place Holds in the OPAC. Holds are different from call slip requests.<br><br>CARLI does not support "Holds" from the OPAC.<br>**Leave this box unchecked.** |
| ⊕ *Place Recalls Using the OPAC:* | When checked, patrons in this patron group can place Recalls in the OPAC.<br><br>CARLI does not support Recalls from the OPAC.<br>**Leave this box unchecked.** |
| ∅ *Place Short Loans Using the OPAC:* | Most I-Share libraries do not use Short Loan.<br><br>CARLI does not support Short Loan requests from the OPAC.<br>**Leave this box unchecked.** |
| ⊕ *Place Call Slip Requests Using the OPAC:* | When checked, patrons in this patron group can place Call Slip Requests in the OPAC.<br><br>**UB:** Check for UB patron groups.<br><br>**Local:** Check this box for any local patron group who you will allow to place local call slip requests from the OPAC. |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

| ⊕ *Email Courtesy Notices:* | Check this box if you want to email Courtesy Notices to patrons in this patron group.<br><br>**UB:** Check for UB patron groups.<br><br>**Local:** CARLI recommends check this box for all local patron groups. |
|---|---|
| ⊕ *Email Cancellation Notices:* | Check this box if you want to email Cancellation Notices to patrons in this patron group.<br><br>**UB:** Check for UB patron groups.<br><br>**Local:** CARLI recommends check this box for all local patron groups. |
| ⊕ *Email Item Available Notices:* | Check this box if you want to email Item Available Notices to patrons of this patron group.<br><br>**UB:** Check for UB patron groups**.**<br><br>**Local:** CARLI recommends check this box for all local patron groups. |
| ⊕ *Email Overdue Notices:* | Check this box if you want to email the first Overdue Notice to patrons of this patron group.<br><br>**UB:** Check for UB patron groups.<br><br>**Local:** CARLI recommends check this box for all local patron groups. |
| ⊕ *Email (Other) Overdue Notices:* | Check this box if you want to email subsequent Overdue Notices to patrons of this patron group.<br><br>**UB:** Check for UB patron groups.<br><br>**Local:** CARLI recommends check this box for all local patron groups. |
| ⊕ *Email Recall Notices:* | Check this box if you want to email Recall Notices to patrons of this patron group.<br><br>**UB:** Check for UB patron groups.<br><br>**Local:** CARLI recommends check this box for all local patron groups. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

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|---|---|
| ⊕ *Email (Other) Recall Notices:* | Check this box if you want to email Recall Overdue notices to patrons of this patron group.<br><br>**UB:** Check for UB patron groups.<br><br>**Local:** CARLI recommends check this box for all local patron groups. |

**Notes on E-mail:**
- The webpage, "Patrons Receiving Circulation Notices" documents which patrons will receive which circulation notices, and in what manner. Follow its step-by-step instructions to review your library's settings: http://www.carli.illinois.edu/products-services/i-share/circ/secure/PatronCircNotices
- You can set up e-mail for fine/fee notices and statements in the Circulation>Miscellaneous workspace. See pages 10 through 11 of this document. The value you set in the Miscellaneous workspace is a global setting, for the library as a whole, not a policy-level setting that affects only a specific Circ Policy Definition.

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

## F. Items

Libraries can establish a standard replacement cost for each item type, indicate whether that item type is eligible for short loan requests, apply order information if "Item Distribution" functionality is utilized, and determine whether library staff can place holds or recalls for items with Missing, Lost-System Applied, or Lost-Library Applied statuses.
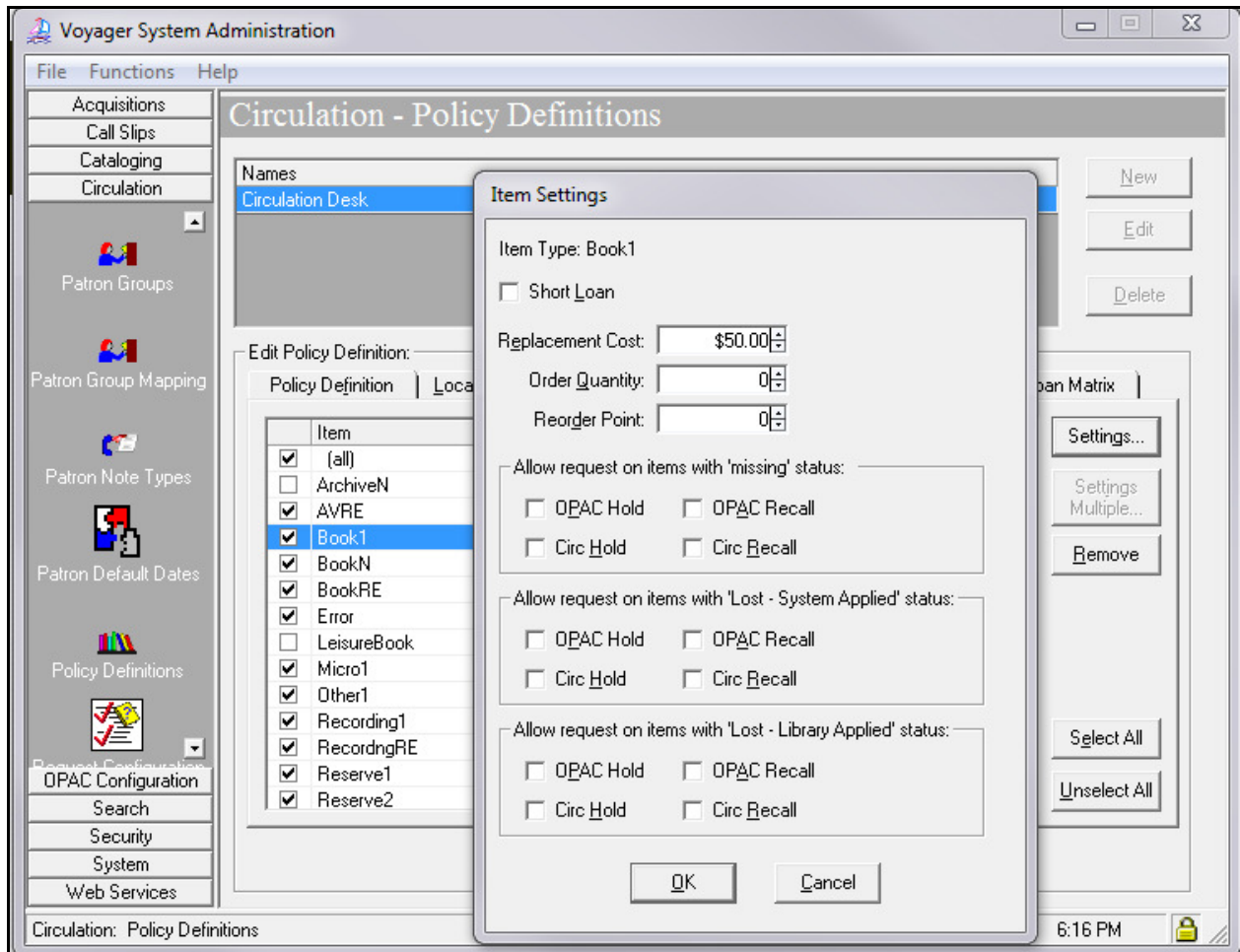


*Circulation Items Tab and Settings Dialog Box*

Notes:
1. Voyager uses the lost item "Replacement Cost" only if there is no specific price in the item record. Libraries that want to charge a lost fee that represents the individual item's value should enter a price in the item record.
2. You must create a default [all] setting for Voyager to use when no other specific settings have been defined.
3. On the Items tab, a check in the box next to the item type indicates that Voyager has stored some settings. It is possible to save to the database with no information added, effectively storing zeroes/blanks as the settings.

Legend:
   ⊕ Consortial Rule for setting value(s)
   ☑ CARLI Recommendation for setting value(s)
   ∅ Does not apply; Or, Do not change this value

Descriptions:

| | |
|---|---|
| ∅ *Short Loan:* | Most I-Share libraries do not use Short Loan. Contact CARLI Support to discuss recommended settings if your library does use Short Loan.<br><br>**Leave this box unchecked.** |
| ☑ *Replacement Cost:* | Voyager uses this lost item replacement cost if there is no specific price in the item record.<br>• Valid numbers are 00.00 to 99999.99.<br>• Entering (00.00) zero means that patrons will not be charged a replacement fee for lost items of that Item Type.<br>• Libraries that want to charge a lost fee that represents the individual item's value should enter a price in the item record.<br><br>**Enter the default replacement cost for an item of this type.** |
| ☑ *Order quantity:* | If "Distribution Item" functionality is enabled at your library enter the number of items that would automatically be ordered when the Reorder point number is reached. Valid numbers are 0-9999.<br><br>Most I-Share libraries do not use Distribution. Contact CARLI Support to discuss recommended settings if your library does use Distribution.<br><br>**Leave this box unchecked.** |
| ☑ *Reorder point:* | If "Distribution Item" functionality is enabled at your library, enter the number of items remaining that will trigger reordering of the item. Valid numbers are 0-9999.<br><br>Most I-Share libraries do not use Distribution. Contact CARLI Support to discuss recommended settings if your library does use Distribution.<br><br>**Leave this box unchecked.** |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ***Allow request on items with 'missing' status:*** | Think about your library's policies for the item type you are editing:<br><br>Does it make sense for library staff to place a hold or recall for and item of the item type, when the item has a status of Missing? Most I-Share libraries leave the box unchecked.<br><br>    • **If yes, check this check box.**<br>    • **If no, leave this box unchecked.**<br><br>I-Share libraries do not allow patrons to place Holds or Recalls in the OPAC; the OPAC hold and OPAC recall settings do not apply. |
| ***Allow request on items with 'Lost- System Applied' status:*** | Think about your library's policies for the item type you are editing:<br><br>Does it make sense for library staff to place a hold or recall for and item of the item type, when the item has a status of Lost-System Applied? Most I-Share libraries leave the box unchecked.<br><br>    • **If yes, check this check box.**<br>    • **If no, leave this box unchecked.**<br><br>I-Share libraries do not allow patrons to place Holds or Recalls in the OPAC; the OPAC hold and OPAC recall settings do not apply. |
| ***Allow request on items with 'Lost- Library Applied' status:*** | Think about your library's policies for the item type you are editing:<br><br>Does it make sense for library staff to place a hold or recall for and item of the item type, when the item has a status of Lost-Library Applied? Most I-Share libraries leave the box unchecked.<br><br>    • **If yes, check this check box.**<br>    • **If no, leave this box unchecked.**<br><br>I-Share libraries do not allow patrons to place Holds or Recalls in the OPAC; the OPAC hold and OPAC recall settings do not apply. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

**G. Matrix**

The Circulation Policy Matrix contains the Patron Group/Item Type combinations that govern a specific circulation transaction from a location that belongs to this Circulation Policy Group.

**Voyager requires least one matrix entry, the [all/all], for each Circulation Policy Group, but CARLI recommends that you add a matrix entry for each patron group/item type combination at your library.**

To create a matrix:
• Set the Policies for the specific Patron Group/Item Type combination.
• Set the Intervals for the specific Patron Group/Item Type combination.

Notes:
1. If there is no matrix configured for a specific patron/item combination, the system uses the [all/all] default policy. Libraries can either make the [all/all] permissive or non-permissive; each method has benefits and drawbacks. CARLI recommends creating a non-permissive [all/all] policy.
    • See page 63 of this documentation for CARLI's recommended [all/all] settings.
2. For local call slips (your patrons requesting your items), please read CARLI's Local Call Slip documentation: http://www.carli.illinois.edu/products-services/i-share/circ/secure/LocalCallSlips
3. If you want to prohibit UB requests for a particular item type (for example, Reserve or Reference), leave the UB check box unchecked in the matrix entry for the UB patron groups and those item types. This will prevent most, but not all, UB requests on those items.
4. I-Share item type conventions:
    • Item type codes that end with N represent non-circulating items. Typically, libraries would not check the Charge/Renew checkbox for any patron group.
    • Item type codes that end with LR represent items eligible for local requests only. Typically libraries will check Charge/Renew and Call Slip for local patron groups, and not check UB for any patron groups.
    • Item type codes that end with RE represent request exempt items. Typically, libraries will check Charge/ Renew, but neither the Call Slip nor the UB checkbox for all patron groups.

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

*The Add – Circulation Policy Matrix Dialog Box*

You can add matrix entries one at a time, or in groups where matrices have identical or similar settings. To open the "Add Matrix" dialog box (shown above), click the "Add" button on the Matrix Tab.

- To **add one matrix entry at a time**, select one patron group and one item type, fill out the settings tab, then the intervals tab, then click Save.
- To **add multiple matrices simultaneously**, hold down the Ctrl key on your keyboard while clicking to select multiple patron groups and/or multiple item types. Fill out the settings tab and the intervals tab, then click Save.

Legend:
        ⊕ Consortial Rule for setting value(s)
        ☑ CARLI Recommendation for setting value(s)
        ∅ Does not apply; Or, Do not change this value

You can also edit matrix entries one at a time, or in groups.
- To **edit a single matrix entry**, select the matrix entry from the list and click the Modify button.
- To **edit multiple matrices simultaneously**:
    1. 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.
        - The [all/all] matrix must be edited individually.
    2. Click the Modify 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 tab and Intervals tab. Check the "Modify?" checkbox to enable updates to a value.
    5. Click save for the matrix tab.
    6. Click save for the policy definition.



*The Edit Multiple – Circulation Policy Matrix Dialog Box*

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

***Settings Tab***

Descriptions:

| ☑ *Charge/Renew:* | When checked patrons in this Patron Group may circulate (charge, renew) items of this Item Type.<br>• When not checked, no other values need be entered on the settings tab. You will still enter appropriate settings on the intervals tab (see pages 59 through 62 of this document).<br><br>**Check this box for the Patron Group/Item Type combinations for which you want to enable circulation.** |
|---|---|
| ☑ *Recall:* | When checked, library staff may place a recall request in the Voyager Circulation client on behalf patrons in this Patron Group for items of this Item Type.<br><br>**Check this box for the Patron Group/Item Type combinations for which you want to allow recalls from the Circulation client.** |
| ☑ *Hold:* | When checked, library staff may place a Hold in the Voyager Circulation client on behalf patrons in this Patron Group for items of this Item Type.<br><br>**Check this box for the Patron Group/Item Type combinations for which you want to allow holds from the Circulation client.** |
| ☑ *Call Slip:* | When checked, library staff via the Circulation client, and patrons in this Patron Group via the OPAC, may place a call slip requests for items of this item type.<br>• The Call Slip check box does not affect UB patron's requests, but must be checked to allow your library's local patrons to request local items for local pickup.<br><br>**Check this box for the Patron Group/Item Type combinations for which you want to allow local call slip requesting.** |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

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|---|---|
| ☑ *UB Check Box:* | When checked, patrons in this Patron Group may place UB request for items of this Item Type.<br>• **Local:** The UB check box AND Call Slip check box must be checked to allow your library's local patrons to request your library's local items for pickup at another I-Share library.<br>• **UB:** For UB patron groups, the UB check box must be checked to allow the UB patron to request an item of the item type.<br><br>**Check this box for the Patron Group/Item Type combinations for which you want to allow UB requesting.** |
| ⊕ *Loan Period:* | Enter the loan period in days, hours, minutes, Indef, or term.<br>• Valid numbers for days and minutes are 1-999.<br>• Valid numbers for hours are 1-24.<br>• If the loan period is Indef, the due date will be the patron record's expiration date.<br>• If the loan period is Term, enter 1 as the value. Voyager calculates the loan period from the End of Term value set in the relevant calendar.<br><br>**UB:** For the UBLong, UBReg, and UBIN Patron Group combinations with UB-circulating items, set this value to 28 days for print Item Types, and 14 days for non-print Item Types.<br><br>**Local:** Set as appropriate for local patron groups. |
| ⊕ *Renewal Period:* | Enter the renewal period that patrons in this Patron Group should receive for items of this Item Type.<br>• Enter 0 (zero) if you do not allow renewals.<br>• If the Loan Period is days or minutes, the Renewal Period will also be in days or minutes.<br>• If the Loan Period is hours, the Renewal Period may be hours or minutes, but 24 is the maximum value for hours.<br>• If the Loan Period is Indef, leave the box blank.<br>• If the Loan Period is Term, the Renewal Period may be set as days or term.<br><br>**UB:** For the UBLong and UBReg Patron Group combinations with UB-circulating Item Types, set this value to 28 days for print Item Types, and 0 days for non-print Item Types.<br><br>**Local:** Set as appropriate for local patron groups. |

Legend:
  ⊕ Consortial Rule for setting value(s)
  ☑ CARLI Recommendation for setting value(s)
  ∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ⊕ *Max # of Sequential Renewals:* | Enter the number of times you allow a patron to renew an item of this type.<br>• Valid numbers are 0-99.<br>• Enter 0 (zero) if you do not allow renewals.<br>• The *Renewal Period* you may have entered does not apply if the *Maximum Number of Sequential Renewals* following is 0 (zero).<br><br>**UB:** For UB-circulating print Item Types, set this value to 6 renewals for UBLong and to 3 renewals for UBReg. UB-circulating non-print Item Types should have 0 (zero) renewals.<br><br>**Local:** Set as appropriate for local patron groups. |
| *Fine Interval:* | Voyager multiplies the *Fine Interval* by the *Fine Rate* below to calculate the fine at the time of discharge.<br>• If the Loan Period is days or minutes, enter the Fine Interval in days or minutes.<br>• If the Loan Period is hours, enter the Fine Interval in hours or minutes.<br>• If the Loan Period is Indef, leave the box blank.<br>• If the Loan Period is Term, the Fine Interval is days. |
| ⊕ *Fine Rate:* | The *Fine Rate* is the amount you charge for each day/hour/minute an item is overdue.<br>• Valid numbers are 00.00-999.99.<br>• Voyager calculates the fine when an item is discharged.<br>• If the total fine exceeds the *Max Fine Amount* set in the matrix entry, the *Max Fine Amount* will be applied.<br>• Enter 00.00 for any Patron Group/Item Type combination where you will not charge overdue fines.<br><br>**UB:** Since, according to the UB Standard Policy, libraries do not assess overdue fines for UB loans, set a $0.00 fine rate for the UBReg, UBLong, and UBIN Patron Groups for all Item Types.<br><br>**Local:** Set as appropriate for local patron groups. |

Legend:
   ⊕ Consortial Rule for setting value(s)
   ☑ CARLI Recommendation for setting value(s)
   ∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| ***Max Fine Amount:*** | Enter a number for the maximum fine charged for an overdue item of this Patron Group/Item Type combination.<br>• Valid numbers are 0.00-9999.99.<br>• If you do not cap overdue charges, set at $0.00 (zero).<br>• If you set this field to $0.00 and you check the *Include Max Fine Amount for Lost Item* as described on page 28 of this document, Voyager will reset any accumulated overdue fines to $0.00 when the item becomes lost.<br><br>**UB:** Libraries do not assess overdue fines for UB loans. Set at 0 (zero).<br><br>**Local:** Set as appropriate for local patron groups. |
| ***Max Fine for Recalls:*** | [Optional] Enter a number for the maximum fine charge you will charge for an overdue recalled item.<br>• Valid numbers are 0.00-9999.99.<br>• If you do not cap overdue charges on recalled items, leave this box blank.<br><br>**UB:** The UB Standard Policy does not currently regulate fines for recalled items. Set as appropriate for your library's policies.<br><br>**Local:** Set as appropriate for local patron groups. |
| ***Min Loan Period for Recalled Items:*** | [Optional] This value determines the amount of time a patron will be allowed to keep a recalled item to finish their usage of it. This value is used to recalculate the due date.<br>• Valid numbers are 0-999. If you enter "0", the recalled items are due back immediately.<br>• If the *Loan Period* is in days, the *Min Loan Period for Recalled Items* will also be days. If hours, hours; if minutes, minutes.<br>• If the *Loan Period* is Indef or term, the *Min Loan Period for Recalled Items* is in days.<br><br>With the way that Recalls currently function in Voyager:<br>• if your library would like to guarantee a patron a certain amount of time to return a non-overdue, recalled item,<br>• and if your library does not have the *Extend Recall Due Date* checkbox checked on the Circ Policy Definition Policies tab,<br>• then CARLI recommends that you set the value of *Min Loan Period for Recalled Items* to zero, and, instead, enter the desired loan period into the *Recall Return Interval* setting, described on page 57.<br><br>**UB/Local:** CARLI recommends that you enter a value of zero for the UB and local patron groups. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

| | |
|---|---|
| **_Recall Fine Interval:_** | [Optional] Voyager multiplies the _Recall Fine Interval_ by the _Recall Fine Rate_ below to calculate the fine at the time of discharge.<br>• If the Loan Period is days or minutes, enter the Fine Interval in days or minutes.<br>• If the Loan Period is hours, enter the Fine Interval in hours or minutes.<br>• If the Loan Period is Indef, leave the box blank.<br><br>**UB:** The UB Standard Policy does not currently regulate fines for recalled items. Set as appropriate for your library's policies.<br><br>**Local:** Set as appropriate for local patron groups. |
| **_Recall Fine Rate:_** | [Optional] Enter an amount to be charged for each day/hour/minute that a recalled item is overdue.<br>• Valid numbers are 00.00-999.99.<br>• If the total fine exceeds the amount specified in the _Maximum Fine for Recalls_, Voyager will use the _Maximum Fine for Recalls_ instead.<br><br>**UB:** The UB Standard Policy does not currently regulate fines for recalled items. Set as appropriate for your library's policies.<br><br>**Local:** Set as appropriate for local patron groups. |
| **_Grace Period:_** | [Optional] If you want to establish a period during which no overdue fines will be assessed even though an item is overdue, enter a number in this box.<br>• Valid numbers are 0-999.<br>• If the loan period is in days, hours, or minutes, the Grace Period will be the same.<br>• If the Loan Period is Term, the Grace Period is in days.<br>• If the Loan Period is Indef, Grace Periods do not apply.<br>• Enter 0 (zero) for no Grace Period.<br><br>**UB:** The UB Standard Policy does not currently regulate Grace Periods. Set as appropriate for your library's policies.<br><br>**Local:** Set as appropriate for local patron groups. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

| Recall Return Interval: | [Optional] Voyager adds this interval to the *Minimum Loan Period for Recalled Items* to ensure adequate time for the library to notify the patron and for the patron to return the recalled item before the item becomes overdue. |
|---|---|
| | • Valid numbers are 0-999. |
| | • These numbers default to the same day/hour/minute values set in the *Min. Loan Period for Recalled Items*. |
| | With the way that Recalls currently function in Voyager: |
| | • If your library would like to guarantee a patron a certain amount of time to return a non-overdue, recalled item, |
| | • and if your library does not have the *Extend Recall Due Date* checkbox checked on the Circ Policy Definition Policies tab, |
| | • then CARLI recommends that you enter the desired recall loan period here in the *Recall Return Interval* setting. |
| | **UB:** The UB Standard Policy does not currently regulate recalled items. Set as appropriate for your library's policies. |
| | **Local:** Set as appropriate for local patron groups. Common choices are 3 Days, 7 Days, or 14 Days. |
| Recall Grace Period: | [Optional] If you want to establish a period during which no overdue fines will be assessed even though a recalled item is overdue, enter a number in this box. |
| | • Valid numbers are 0-999. |
| | • If the loan period is in days, hours, or minutes, the *Recall Grace Period* will be the same. |
| | • If the Loan Period is Indef or Term, the *Recall Grace Period* is in days. |
| | • Enter 0 (zero) for no *Recall Grace Period*. |
| | **UB:** The UB Standard Policy does not currently regulate recalled items. Set as appropriate for your library's policies. |
| | **Local:** Set as appropriate for local patron groups. |

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

| Max Items Borrowed for this Patron Group & Item Type: | [Optional] If you enter a value in this box, Voyager compares the number of items the patron has already checked out that belong to the same item type within the same circulation policy definition as the new item to be charged. If the number exceeds the limit, Voyager will block the patron from charging the new item.<br><br>Compare this limit to others:<br>• SysAdmin> Circulation> Policy Definition> Patrons tab > Max Items Borrowed in this Policy Group (page 35 of this document): Counts the overall number of charged items from within the policy definition, irrespective of Item Type.<br>• SysAdmin> Circulation> Patron Groups> Global Borrowed Item Limits (page 15 of this document): Counts the total number of charged items by Item Type, irrespective of policy definition.<br><br>**UB:** CARLI recommends that you do not set limits for the UB patron groups. If you must set limits, set the UB groups equivalently to their "model" local groups (UBReg=UG; UBLong=FC; UBIN=UG)<br><br>**Local:** Set as appropriate for local patron groups. |
|---|---|
| ⊕ *Renew From:* | • If you select the *Original Due Date* button, the item will be renewed relative to its original due date.<br>• If you select the *Renewal Date* button, the item will be renewed relative to the date of the renewal.<br>• Does not apply if renewal is term.<br>• Use the *Original Due Date* to allow patrons the maximum loan time.<br><br>**UB:** For the UB patron groups, select *Original Due Date*.<br><br>**Local:** Set as appropriate for local patron groups. CARLI recommends *Original Due Date*. |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

**Intervals Tab**

Each matrix entry has its own intervals to define.



Circulation Matrix Intervals tab

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 Voyager declares it lost.

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

Descriptions:

| ⊕ *Courtesy Notice Interval:* | The *Courtesy Notice Interval* is the number of days before an item is due when Voyager will produce a Courtesy Notice, if you choose to send Courtesy Notices.<br><br>You must supply a value if you have checked the *Courtesy Notices Apply* box in Circulation Policy Definitions/Patron Rules.<br>• Valid numbers are 0-999.<br>• A zero means no notice will be sent, regardless of the policy definition.<br><br>**UB:** Set interval to 7 for the UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. |
|---|---|
| ⊕ *Minimum Loan for Courtesy:* | [Optional] Enter a number in this box to establish the minimum loan length which are eligible for courtesy notices.<br>• If the difference between the charge date and the current date is greater than this minimum, and if the current date matches the *Courtesy Notice Interval*, the item is eligible for a notice.<br>• Entering 0 (zero) will make all loans (except Indef, Hour, or Minute loans) eligible for a courtesy notice.<br>• The maximum interval is 999 days. Entering 27 days, for example, would make items with 4 week loan periods or longer eligible for courtesy notices.<br>• If you choose not to send out courtesy notices for local patrons, set the *Courtesy Notice Interval* (above) at zero for the matrix entry.<br><br>**UB:** Set interval to 0 for the UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. CARLI recommends 0 (zero). |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

| ⊕ *First Overdue Interval:* | Enter the number of days after an item is due, before you send the first overdue notice. If you establish a grace period, take that period into consideration.<br><br>You must supply a value here if you have checked the *Overdue Notice Apply* box in Circulation Policy Definitions/Patron Rules.<br>• Valid numbers are 0-999.<br>• A zero means Voyager will produce an overdue notice as soon as the item is past due and CARLI runs Circjob2. Currently, CARLI runs Circjob2 once daily, during the overnight hours.<br><br>**UB:** Set interval to 7 for the UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. |
|---|---|
| ⊕ *Lost Interval:* | Enter the number of days after which Voyager should declare an overdue item lost.<br>• Valid numbers are 0-999.<br>• Circjob2 updates overdue items as lost. Currently, CARLI runs Circjob2 once daily, during the overnight hours.<br>• Once an item becomes lost, Voyager produces no further overdue notices for it. The process to updates the patron and item records.<br><br>**UB:** Set interval to 29 for the UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. |
| ⊕ *Other (Overdue) Notice Interval:* | Enter the number of days between each subsequent overdue notice, after the first one, specified above.<br>• Valid numbers are 0-999.<br>• Once an item becomes lost, Voyager produces no further overdue notices for it.<br>• Entering zero will produce a notice any time CARLI runs Circjob2, after the item is overdue. Currently, CARLI runs Circjob2 once daily, during the overnight hours.<br>• Enter 1 if you want at least 24 hours between Overdue Notices.<br><br>**UB:** Set interval to 14 for the UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. |

Legend:
  ⊕ Consortial Rule for setting value(s)
  ☑ CARLI Recommendation for setting value(s)
  ∅ Does not apply; Or, Do not change this value

| ⊕ *Other (Overdue) Notice Count:* | Enter the number of overdue notices you want to send, after the first one.<br>• Valid numbers are 0-999.<br>• Once an item becomes lost, Voyager produces no further overdue notices for it.<br><br>**UB:** Set count to 1 for the UB patron groups.<br><br>**Local:** Set as appropriate for local patron groups. |
|---|---|
| *Overdue Recall Notice Interval:* | [Optional] Enter in this box the number of days you wait after a recalled item is overdue, before you send the first overdue notice.<br><br>**UB:** The UB Standard Policy does not currently regulate recalled items. Set as appropriate for your library's policies.<br><br>**Local:** Set as appropriate for local patron groups. |
| *Overdue Recall Notice Count:* | [Optional] Enter the number of additional overdue recall notices you want to send, after the first one.<br>• Valid numbers are 0-999.<br>• Once an item becomes lost, Voyager produces no further overdue recall notices for it.<br><br>**UB:** Recalls are not currently regulated by the UB Standard Policy; set as appropriate for your library's policies.<br><br>**Local:** Set as appropriate for local patron groups. |
| ⊕ *Hold Shelf Life:* | The Hold Shelf Life refers to how long the pick-up location should keep a requested item (local Call Slip or UB) for the patron to come and pick up. At the end of the *Hold Shelf Life*, libraries route uncollected items home or reshelve them.<br>• Valid numbers are 1-99.<br><br>**UB:** Set interval to 14 for the UB patron groups and for the [all/all] matrix entry.<br><br>**Local:** Set as appropriate for local patron groups. |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value

## Configuring the [all/all] matrix entry

If there is no matrix configured for a specific patron/item combination, the system uses the [all/all] default policy. Libraries can either make the [all/all] permissive or non-permissive; each method has benefits and drawbacks. CARLI usually recommends creating a non-permissive [all/all] policy.

| ☑ *Charge/Renew* | **Do not check this box.** |
|---|---|
| ☑ *Loan Period:* | **Set to 0.** |

On the Intervals tab, CARLI recommends setting the Intervals to match the UB Standard Policy.

| ☑ *Courtesy Notice Interval:* | **7 Days** |
|---|---|
| ☑ *Minimum Loan for Courtesy:* | **Set to 0.** |
| ☑ *First Overdue Interval:* | **7 Days** |
| ☑ *Lost Interval:* | **29 Days** |
| ☑ *Other (Overdue) Notice Interval:* | **14 Days** |
| ☑ *Other (Overdue) Notice Count:* | **Set to 1.** |
| ☑ *Overdue Recall Notice Interval:* | **Library preference.** |
| ☑ *Overdue Recall Notice Count:* | **Library preference.** |
| ⊕ *Hold Shelf Life:* | The Hold Shelf Life setting in the all/all matrix affects the hold shelf length for incoming I-Share materials. **Set to 14 Days** |

## H. Short Loan Matrix

**∅ Most I-Share libraries do not use Short Loans. Leave the settings blank.**
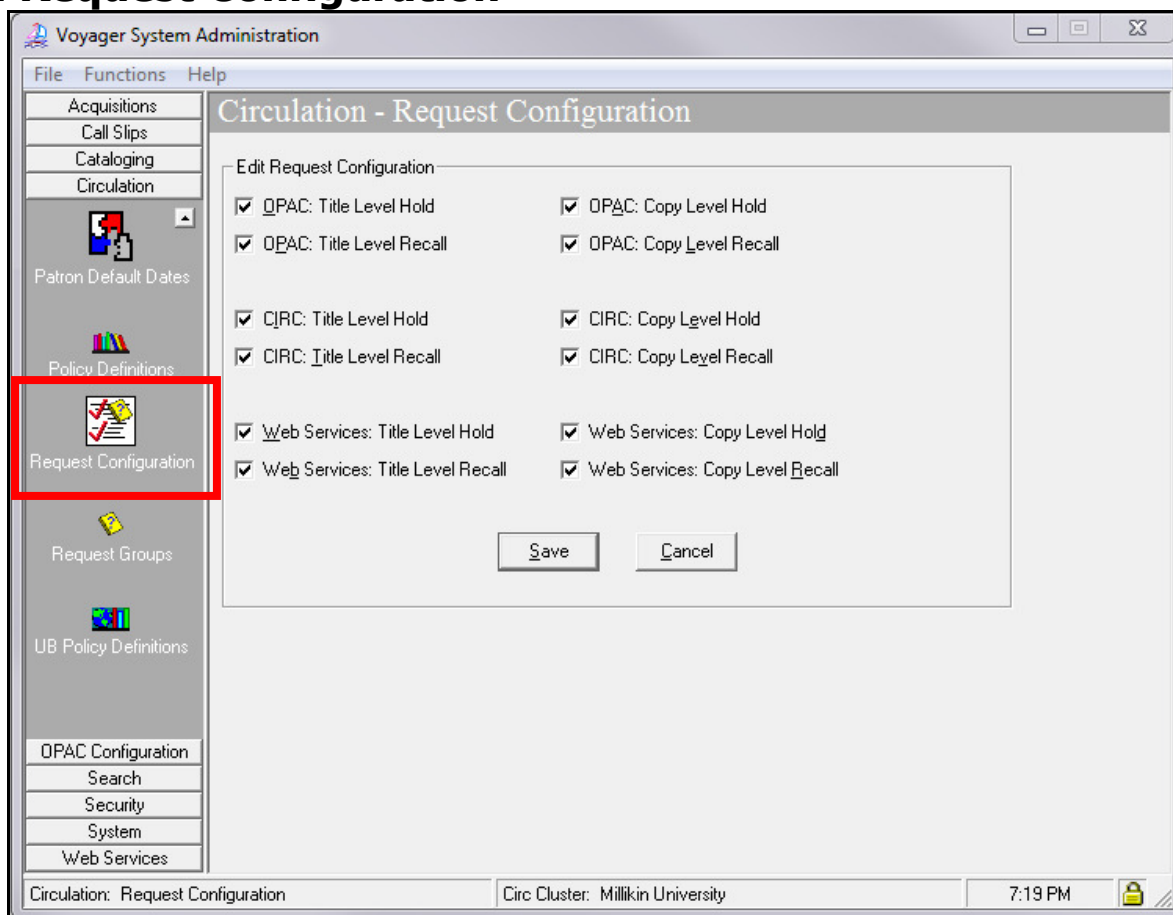
You will not be able to create Short Loan matrix entries until other SysAdmin settings are properly configured.

Contact CARLI Support to discuss recommended settings if your library does use Short Loan.

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

# X. Request Configuration



Circulation Request Configuration Workspace

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 overall settings determine which types of holds or recalls can be placed.
- 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.
  - If your library uses *Library Administrative Request* in the Circulation Client to place recalls, you must check at least one of the "CIRC: Hold" and one of the "CIRC: Recall" checkboxes.

**If you do not want your library staff to place a particular kind of request, uncheck the appropriate checkboxes and click save.**

# XI. Request Groups

**∅ CARLI recommends that you leave this section blank.**

Contact CARLI Support to discuss recommended settings if your library does use Request Groups.

Legend:
  ⊕ Consortial Rule for setting value(s)
  ☑ CARLI Recommendation for setting value(s)
  ∅ Does not apply; Or, Do not change this value

# XII. UB Policy Definitions

This section focuses on setting up the general resource sharing parameters in your library's database. You will need to configure both your library's local patron groups and the UB patron groups in your database.

In order to make Universal Borrowing (UB) work consistently throughout the I-Share libraries, the UB policy configurations must be identical in all I-Share databases.



*Circulation UB Policy Definitions Workspace*

Legend:
    ⊕ Consortial Rule for setting value(s)
    ☑ CARLI Recommendation for setting value(s)
    ∅ Does not apply; Or, Do not change this value

Descriptions:

| ⊕ **UB Eligible:** | **Check the checkbox for each patron group that should have UB borrowing privileges at other I-Share libraries.**<br>• This includes the three UB patron groups: UBIN, UBLong, and UBReg.<br><br>**Leave blank (unchecked) for the following patron Groups:**<br>• LB: Local Building Use Only;<br>• LH: Local High Privilege;<br>• LL: Local Low Privilege;<br>• PP: Problem Patron;<br>• II: International ILL;<br>• IL: Interlibrary Loan;<br>• LU: Local Use;<br>• UBNonCirc: UBNonCirc;<br>• Other local patron groups that should not be UB eligible. |
|---|---|

Once you have clicked UB Eligible and saved the change, a check mark will appear to the left of the patron group name on the main UB Policy Definitions screen. You can then identify with a glance which patron groups are UB Eligible.

For the UB Eligible patron groups, configure the remaining UB Policies as shown below.

Libraries have the option to enable "Block Local Transactions" for any of these values. Once your patron has reached the UB threshold on a particular setting, if you have checked the "Block Local Transactions" box, that same patron would also be blocked locally at home.

| ⊕ **UB Fines/Lost Item Fees Apply:** | **Max outstanding balance of $200** |
|---|---|
| ⊕ **Max UB Demerits Apply:** | **Leave unchecked. I-Share libraries do not use demerits.** |
| ⊕ **Max UB Items Borrowed Apply:** | **Leave unchecked.** |
| ⊕ **Max UB Overdue Items Apply:** | **Check, with a value of 25 Max.** |
| ⊕ **Max UB Overdue Recalled Items Apply:** | **Check, with a value of 1 Max.** |
| ⊕ **Max UB Self-Shelf Returns Apply:** | **Check, with a value of 10 Max.** |
| ⊕ **Max UB Claimed Returns Apply:** | **Check, with a value of 10 Max.** |
| ⊕ **Max UB Lost Items Apply:** | **Check, with a value of 3 Max.** |
| ⊕ **Max UB Requests Apply:** | **Leave unchecked.** |

Legend:
⊕ Consortial Rule for setting value(s)
☑ CARLI Recommendation for setting value(s)
∅ Does not apply; Or, Do not change this value