Checklist Voyager System Administration in I-Share Libraries: Migrating Voyager Libraries 2013

6/14-6/21 SysAdmin tasks/reading

- ☐ Part **1** System --- **1.** Locations
- ☐ Part **1** System --- **4.** Print Locations
- ☐ Part **1** System --- **5.** Miscellaneous
- ☐ Part **1** System --- **8.** Owning Libraries
- ☐ Part **1** System --- **11.** Base Currency
- ☐ Part **2** Security --- **1.** Operator Profiles
- ☐ Part **2** Security --- **2.** Cataloging Profiles
- ☐ Part **2** Security --- **3.** Circulation Profiles
- ☐ Part **2** Security --- **4.** Acquisitions/Serials Profiles
- ☐ Part **2** Security --- **5.** Master Profiles
- ☐ Part **3** Circ UB --- **1.** Calendars
- ☐ Part **3** Circ UB --- **2.** Cluster Maintenance
- ☐ Part **3** Circ UB --- **3.** Miscellaneous
- ☐ Part **3** Circ UB --- **4.** Patron Groups
- ☐ Part **5** OPAC & Search --- **1.** Required Database Definitions
- ☐ Part **5** OPAC & Search --- **2.** Required Search Configurations
- ☐ Part **5** OPAC & Search --- **3.** Field Weighting
- ☐ Part **5** OPAC & Search --- **4.** Material Type Definitions
- ☐ Part **5** OPAC & Search --- **5.** Circulation Changes for WebVoyage
- ☐ Part **5** OPAC & Search --- **11.** Optional Updates: Location Limit Groups

*Libraries live For Local Activity 6/21
*I-Share Email Alternative set up 6/21

6/24-6/28 SysAdmin tasks/reading

- ☐ Part **6** Cataloging --- **1.** Authority Duplicate Detection Profiles
- ☐ Part **6** Cataloging --- **2.** Bibliographic Duplicate Detection Profiles
- ☐ Part **6** Cataloging --- **3.** Call Number Hierarchy
- ☐ Part **6** Cataloging --- **4.** Cataloging Policy Definitions
- ☐ Part **6** Cataloging --- **5.** Bulk Import Rules
- ☐ Part **6** Cataloging --- **6.** Item Type Abbreviations
- ☐ Part **7** Acquisitions --- **(entire section)**

*Libraries create dup detection rules and, if needed, bulk import rules 6/24-6/28

*CARLI creates UB patron groups 7/12

7/15-7/24 SysAdmin tasks/reading

- ☐ Part **1** System --- **3.** Default Address
- ☐ Part **1** System --- **9.** Location Limit Groups
- ☐ Part **3** Circ UB --- **4.** Patron Groups
- ☐ Part **3** Circ UB --- **5.** Patron Group Mapping
- ☐ Part **3** Circ UB --- **6.** Policy Definitions
- ☐ Part **3** Circ UB --- **8.** UB Policy Definitions
- ☐ Part **4** Call Slips --- **(entire section)**
- ☐ Part **5** OPAC & Search --- **6.** Optional Updates: Local Call Slips

*Libraries create matrix entries for UB patron groups 7/15-7/24
*Libraries set up call slip queues 7/15-7/24

*CARLI does UB Integration 7/26-7/29

*Libraries live with UB 8/9
*Libraries live in UC 8/9

Follow-up SysAdmin tasks/reading

- ☐ Part **1** System --- **2.** Item Types
- ☐ Part **1** System --- **6.** Fines/Fees
- ☐ Part **1** System --- **7.** Statistical Categories
- ☐ Part **1** System --- **10.** Access Control Groups
- ☐ Part **3** Circ UB --- **4.** Patron Groups
- ☐ Part **3** Circ UB --- **7.** Request Groups
- ☐ Part **5** OPAC & Search --- **7.** Optional Updates: Additional Request Forms
- ☐ Part **5** OPAC & Search --- **8.** Optional Updates: Additional Database Definitions
- ☐ Part **5** OPAC & Search --- **9.** Optional Updates: Additional Search Configuration
- ☐ Part **5** OPAC & Search --- **10.** Optional Updates: Title List Column Names
- ☐ Part **5** OPAC & Search --- **12.** Optional Updates: Holdings Sort Groups
- ☐ Part **6** Cataloging --- **6.** Item Type Abbreviations