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

This handout is created with the assumption that the migrating Voyager libraries are already familiar with the Voyager System Administration Client. It details the System Administration settings that need to be configured for the consortial setting.

> **Legend:**
> ⊕ **Consortial Rule for setting values(s).**
> ☑ **CARLI Recommendation for setting value(s).**
> ⊘ **Does not apply; or, DO NOT change this value.**
> ➡ **FYI explanation**
> **S.A. 7.2** *Voyager 7.2 System Administration User's Guide (October 2010)*

More detailed information on System Administration settings for the I-Share Environment, screenshots and in-depth explanation: http://www.carli.illinois.edu/products-services/i-share/sysadmin

Complete information from Ex Libris in the Voyager 7.2 System Administration User's Guide:
http://www.carli.illinois.edu/products-services/i-share/vendor-docs

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Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 1

Part 1: System Reference Pages: S.A. 7.2, pages 10-1 through 10-104

1. Locations

HAPPENING LOCATIONS

➡ A HAPPENING Location is where work activity takes place. Such Locations typically include circulation desks, a service point, a cataloging area, or an acquisitions area.

⊕ HAPPENING Locations should be named with all capital letters to help distinguish them from Storage Locations. Please edit your existing HAPPENING location names accordingly.

☑ Since periods come before spaces in the alphabet, and spaces come before letters, use periods and spaces to adjust the order in which locations are listed if your library has more than one circulation HAPPENING Location.

Example:
.MAIN CIRCULATION DESK
BRANCH LIBRARY CIRC DESK
GOV DOCS CIRC DESK
MUSIC CIRC DESK

☑ For every HAPPENING Location, add addresses appropriate for notices such as overdue notices, purchase orders, claims, etc. An address on a HAPPENING Location will override the System Default Address on reports and notices.

➡ You can have up to 6 addresses for each Location

⊕ Both Street Address and Circ Desk Address must be enabled for Circulation HAPPENING locations. Click the [Address] button at the bottom of the Edit Location screen to enter these addresses.

⊕ The first line of the addresses entered for all Circulation HAPPENING locations must be the ILDS address for your institution. Example first line, ILDS: UIU

⊕ Both Ship to Address and Bill to Address must be enabled for Acquisitions HAPPENING locations. Click the [Address] button at the bottom of the Edit Location screen to enter these addresses.

2. Item Types

➡ As a Voyager library before joining I-Share, you will have institution-specific item type codes.

⊕ When adding a new item type from now on, please try using one of these following item type codes. You may change the Item Type Name as needed for your library, but please leave the code unaltered.
List of codes: http://www.carli.illinois.edu/products-services/i-share/cat/itemtype

3. Default Address

➡ The default address is used with UB reports and notices, as well as local notices *unless* the HAPPENING Location associated with the report, or the notice's item, has a Location address defined.

⊕ You MUST enter a complete Default Address.

⊕ Include your ILDS routing info for the first line of the address. Example first line, ILDS: UIU

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☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 2

4. Print Locations

➡ A Print Location is not a physical location, but rather a queue into which files are directed for the printing of notices and reports. For example, when a CIRC job is run, Voyager will run the job against the whole database and divide the output into the Print Locations each institution has defined. The output can be printed from any PC set up to run Voyager reports.

⊕ If you plan to use the CARLI I-Share Email Alternative for sending notices AND your library has multiple campus locations with different contact information, contact CARLI support at support@carli.illinois.edu about how to configure your print locations.

⊕ Each individual PC that will print reports and notices must have the Voyager Reporter client and MS Access 2002 or higher installed on it.

⊕ Review that you currently have (at least) one Print Location created for each of the four main Voyager Modules, and that each is set as the Default Print Location for each module:
Acquisitions
Cataloging
Circulation
Media Scheduling

☑ Other print locations may be created as needed for your library.

☑ It is recommended you set the Default-Default Print Location to be the same as the Default Print Location for Circulation.

5. Miscellaneous

⊕ All three "Retain Patron Id" items MUST be *UN*-checked.

☑ It is recommended that you check the box for "Display Headings Subfield Separators." If this option is UN-checked, new records added to the database will not have the subfield separator added to the display, which would result in inconsistent displays in the staff clients.

6. Fines/Fees

➡ There are no consortial requirements for the Fines/Fees section of SysAdmin, however, there are some consortial best practices for handling them: http://www.carli.illinois.edu/products-services/i-share/circ -> Best Practices & Workflow Recommendations

7. Statistical Categories
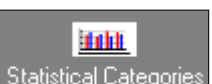
➡ There are no consortial requirements for the Statistical Categories section of SysAdmin.

➡ There are two types of statistical categories: patron and item. These do not affect circulation policies, but they can be used for data collection and analysis, via reports. In Voyager, both are optional.

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8. **Owning Libraries**

➡ An Owning Library provides an additional security mechanism for cataloging. You cannot change another owning library's bibliographic records without security access. Owning Libraries do not impact searches in either the staff clients or the OPAC.

➡ Unless the library designates multiple owning libraries during the initial data conversion to Voyager, when your cataloging data is loaded into the database, all of your records will be owned by the same Owning Library. The name of the initial Owning Library will be your institution's 3-letter I-Share Voyager database name

☑ CARLI recommends that unless the institution requires the additional level of security in cataloging provided through the use of multiple Owning Libraries, that the initial implementation of a single Owning Library per database be retained. If the library is retaining a single Owning Library, verify on the Locations tab that all locations have been selected. If desired by I-Share libraries, the "NUC Code" associated with an Owning Library can be edited to be the library's three-character OCLC institution code.

➡ Please read the System documentation for more specific information about owning libraries if you plan to have more than one Owning Library http://www.carli.illinois.edu/products-services/i-share/sysadmin

9. **Location Limit Groups**

➡ The use of Location Limit Groups within I-Share means the local library's public catalogs (WebVoyáge and VuFind) will allow the user to limit search results to Locations narrower than a single I-Share institution. Users of the DePaul Law Library, for instance, can limit their retrieval to titles held only in DePaul Law Library locations when they are searching the DePaul catalog.

➡ There are no restrictions on the number of Location Limit groups.

☑ CARLI recommends that libraries should decide what Location Limits might be useful for their institution. Libraries need to look at their list of Location Codes to determine what limits will make sense for their institution.

10. **Access Control Groups**

➡ There are no consortial requirements for the Access Control Groups section of SysAdmin.

➡ Presently no I-Share libraries use Access Control Groups.

11. **Base Currency**

⊕ Enter the Base Currency values exactly as shown below:

        Country Name: United States
        Currency Name: U.S. Dollar
        Currency Code: USD
        Base Decimals: 2
        Decimal Delimiter: .
            (Note: The required value for Decimal Delimiter is a period.)

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☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 4

Part 2: Security Reference Pages: S.A. 7.2, pages 9-1 through 9-108

1. Operator Profiles

⊘ **NOTE:** A default Operator of "SYSADMIN" will be created by Ex Libris (ExL) staff. This operator is intended for use by ExL staff only, and most of its values cannot be edited. Please do <u>NOT</u> ever change the password for the SYSADMIN operator locally.

⊘ **NOTE:** CARLI staff will create Operators in your database to be used by CARLI staff only, for troubleshooting purposes. Please do not edit any operators with a last name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or deleting any profiles to which these operators are linked.

2. Cataloging Profiles

⊘ **NOTE:** CARLI staff will create a Cataloging Profile in each database to be used by CARLI staff only, for troubleshooting purposes. Please do not edit the "CARLI" (or "ILCSO" in older I-Share databases) profile, including adding to or deleting any operators linked to these profiles.

Profile Name Tab

    ☑ It is strongly recommended that the profile name be indicative of the authorization levels associated with it (e.g., Cat Supervisor, Cat Student, Cat View Only, etc.).

Profile Values Tab

    ☑ Cataloging profiles that are intended for staff that will copy ("Add") bib records from the I-Share Universal Catalog should have the Export OK option enabled.

    ➡In the I-Share environment, the only use of Voyager's Export capabilities is in association with Bibliographic records, for "backloading" functionality. When a bib record is marked as "OK to Export" in the Voyager cataloging client, that bib is later copied from the database and sent to OCLC to set the institution's holding symbol in WorldCat.

    ☑ In Voyager Cataloging, there are MARC Tag Tables (per record type) that are used to validate the structure of the MARC record when it is added to or edited within the database. For example, a bib record tag table would indicate that the 245 field (for main title) is mandatory in each record, and that it is not a repeatable field. In the I-Share environment, it is recommended that only staff with high-level privileges have the option(s) to Add/Update any of the three record formats enabled.

    ☑ Very few I-Share libraries are currently using Voyager's Global Headings Change functionality, so it is recommended that this option be disabled/unchecked.

    ☑ The option to "Allow Bibliographic Ownership Change" is only applicable to databases that have more than one Voyager Owning Library established. This is not the case for the new I-Share participating libraries, so this option can be disabled/unchecked in these libraries' profiles.

    ☑ The option to "Attach Holdings to any Bibliographic Record" is also related to the matter of multiple owning libraries. For databases with only one owning library established, this option should be enabled/checked.

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☑ CARLI Recommendation for setting value(s)　　➡ FYI, explanation　　　　　　　　　　　　　　　page 5

3. Circulation Profiles

⊘ **NOTE:** CARLI staff will create a Circulation Profile in each database to be used by CARLI staff only, for troubleshooting purposes. Please do not edit the "CARLI" (or "ILCSO" in older I-Share databases) profile, including adding to or deleting any operators linked to these profiles.

Profile Name Tab

☑ It is strongly recommended that the profile name be indicative of the authorization levels associated with it (e.g., Circ Dept Head, Circ Student, Reserve Clerk).

Profiles Tab

⊕ All circulation profiles must have the Mask Patron Social Security Number option checked/enabled, for patron privacy purposes. There is a consortial policy prohibiting storing SSNs in patron records. Enabling masking of the SSN is an extra level of security to prevent unauthorized use of the SSN field in patron records.

4. Acquisitions/Serials Profiles

⊘ **NOTE:** CARLI staff will create a Acq/Ser Profile in each database to be used by CARLI staff only, for troubleshooting purposes. Please do not edit the "CARLI" (or "ILCSO" in older I-Share databases) profile, including adding to or deleting any operators linked to these profiles.

Profile Name Tab

☑ It is strongly recommended that the profile name be indicative of the authorization levels associated with it (e.g., Acq Dept Head, Serials Clerk, Acq/Ser Clerk, etc.).

☑If the profile will be limited to specific locations within the library (set on the Locations Tab), it is recommended that the profile name also include some text that delineates the locations included within the profile. For example, if the library has both a Main and Law library, and the acquisitions profiles include limitations based on locations, the library may wish to create both an Acq Main Supervisor and an Acq Law Supervisor profile.

5. Master Profiles

⊘ **NOTE:** A default Operator of "SYSADMIN" is created by ExL, and it is always associated with a Master Profile called "System Administrator." This master profile is intended for use by ExL staff only, and its Operator and Profile values tabs cannot be edited.

⊘ **NOTE:** CARLI staff will create a Master Profile in each database to be used by CARLI staff only, for troubleshooting purposes. Please do not edit the "CARLI" (or "ILCSO" in older I-Share databases) profile, including adding to or deleting any operators linked to these profiles.

☑ Library staff should create at least one new Master Profile that allows access to all parts of System Administration, and then link the appropriate library operator(s) to this high level master profile. The library may also create additional master profiles as needed to allow access to specific parts of System Administration by library staff. For example:

The library might create a master profile called "Circulation SysAdmin" that would have Profile values enabled for "Circulation Policy Groups" and perhaps other values, but not "Cataloging Policy Groups". This would allow the operators associated with this profile to edit the library's Circulation matrix in SysAdmin, but prevent these operators from accessing the Cataloging section of SysAdmin.

Profile Name Tab

☑ It is strongly recommended that the profile name be indicative of the SysAdmin modules associated with it (e.g., All SysAdmin, Circ SysAdmin, Cat SysAdmin). Alternatively, if the master profile is being created for an individual or staffing level, the name should be indicative of these titles (e.g., Library Director, Circ Supervisor).

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Profile Values Tab

☑ CARLI recommends that a library have a minimum of two Operators with the Security options enabled. Assigning this option to more than two Operators should be carefully considered.

Locations Tab

☑ An individual location can be associated with multiple Master Profiles. For master profiles that allow access to all parts of SysAdmin, it is recommended that all locations be "Selected" in that profile.

Operator Tab

☑ Not all Operators in a database should be included in a Master Profile. Only those staff who should have access to SysAdmin in any way should be associated with a Master profile.

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☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 7

Part 3: Circulation and Universal Borrowing Reference Pages: S.A. 7.2, 5-1 to 5-162

1. Calendars

⊕ Once a calendar has been used, never delete it.

➡ Calendars seem to be a primary cause of UB related issues involving due dates.

➡ How many calendars do you need? The fewer calendars, the easier your circulation administration will be to maintain. However, you will need one circulation calendar for each unique set of days and hours that library activity is available.

☑ Since fixed due dates are globally applied to all item/patron matrices, they violate the UB Standardization Policies. It is recommended that your library does NOT use fixed due dates as UB patrons are affected.

2. Cluster Maintenance

⊘ Do not change the Cluster Code value or the Cluster Name value. Cluster Code should be CLUSTER1, and Cluster Name should be your library name spelled out in full if possible (character limit of 56).

3. Miscellaneous

☑ Email Fine/Fee Notices: CARLI recommends this value be checked. Check this box to activate email notification of Fine/Fee Notices. If no email address is present in the patron record, the statement will be printed.

☑ Email Statement of Fines/Fees: CARLI recommends this value be checked. Check this box to activate email submission of Fine/Fee Statements. If no email address is present in the patron record, the statement will be printed.

⊘ Allow UB Pick-ups from Holding Library: Check or uncheck. Does not apply in our environment.

⊘ Use Demerits: Leave this box unchecked (blank). I-Share libraries do not use this functionality.

⊕ Short Loan Time Buffer: Set this box to zero for now. At this time, I-Share libraries do not use this functionality

4. Patron Groups

➡ As a Voyager library before joining I-Share, you will likely have institution specific patron group codes.

⊕ When adding a new patron group from now on, please try using one of these following patron group codes. You may change the Patron Group Name as needed for your library, but if the Names in the chart above are accurate for your usage of the code, use them for consortial continuity.

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

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 8

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**

➡ The UB patron groups are added to each database by CARLI Office staff.

⊕ Do not revise UB patron group values.

⊕ NOTE: If you decide to use/define a new I-Share patron group in your database, please contact the CARLI Office so the group can be UB-mapped into all of the other I-Share databases.

5. Patron Group Mapping

➡ Patron Group Mapping for Universal Borrowing is configured by CARLI Office staff. A centrally applied script populates this area of your System Administration when new library databases are added to I-Share .

⊘ Once scripted, do not change any mapped values in the Patron Group Mapping workspace.

⊕ NOTE: If you decide to use/define a new I-Share patron group in your database, please contact the CARLI Office so the group can be UB-mapped into all of the other I-Share databases.

6. Policy Definitions

➡ Each library database (cluster) must have at least one Circulation Policy Group, which is the set of locations and policies that are applied to its patron groups and items. The policies provide the rules that govern various patron group circulation activities. If your library has multiple circulation departments, with their own hours and operating policies, you typically have multiple policy groups.

Policy Definition Tab
    ☑ Circ Group Name: Make the name meaningful to your library. Can be up to 40 characters.

Locations Tab
    ⊕ You must have at least one location defined as a circulation HAPPENING Location for each circulation policy group defined.

Legend:
  ⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
  ☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 9

⊕ It is imperative to link the correct default Print Location to each HAPPENING Location. Please double-check that each HAPPENING Location is assigned the correct Print Location.

Settings for your Circ Happening Location(s):

⊕ Courtesy Discharge: Check this box. This will enable the discharge of UB items.

☑ OPAC Suppress For Items On The Fly: When checked, if an operator creates a brief bibliographic, holdings, or item record at this location, the display of that information will be suppressed in the public catalogs.

> If this location is a Reserve Location, the consortial recommendation is to check this box to suppress the OPAC display of on-the-fly records created for Reserves, e.g., professors' copies; xeroxed articles, notes, etc.

☑ Due Date Slip Print: Recommended to leave blank. Check this box if you want Due Date slips to print for patrons. You can turn this on in Circulation Options if needed for specific transactions.

⊕ Hold Slip Print: Check this box. This is required for UB requests and Call Slip.

⊕ Routing Slip Print: Check this box. This is required for UB requests and Call Slip

☑ Discharge Receipt Print: Recommended to leave blank. Check this box if you want discharge receipt slips printed for patrons. You can turn this on in Circulation Options if needed for specific transactions.

☑ Payment Receipt Print: Recommended to leave blank. Check this box if you want receipts printed for payment transactions. You can turn this on in Circulation Options if needed for specific transactions.

⊕ Pick Up Location: Check this box if the location will serve as a pick up location for users' requests. This location will display in a menu of possible pick up "desks" in the request forms in the OPAC.

> Every library will need to designate at least one Circulation HAPPENING Location as a pickup location.

➡ Shelving Interval: Library optional. A "0" signifies immediate availability.

⊕ In Transit Interval: Set to 21 days. After this time period the item will appear on the "Missing in Transit" report.

⊕ Hold Life: Set to 30 days to allow for the longest possible transport time from one library to another via ILDS. UB Routing will not work if this is set at 0 [Zero]

☑ Recall Life: Set at a reasonable level for your library's policies.

Policies Tab

➡ Include Lost Item processing Fee: Optional

➡ Lost Item Processing Fee: Optional

➡ Count Closed… for Loan: Optional

⊕ Count Closed… for Fine: Leave this box blank.

➡ Apply Fixed Due Time for Overnight Loans: Optional

➡ Include Max Fine Amount for Lost Item: Optional

⊕ Renew if Overdue: This box should be checked.

Legend:
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☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 10

⊕ Renew if Recall: Leave this box blank.

⊕ Renew if Hold: Leave this box blank.

⃠ Short Loan Early Pickup Window: I-Share Libraries do not use Short Loan.

☑ Extend Recall Due Date: Recommended leave this box blank.

⃠ Short Loan Unclaimed Interval: I-Share Libraries do not use Short Loan.

Calendar Tab

⊕ For each Policy Group, you must include the historical calendar(s) in addition to the appropriate active calendar.

Patrons Tab

⊕ You must create a default [all] setting that will be used when no other specific settings have been defined. If all of your patron groups use these same settings, then simply defining the [all] settings is sufficient.

⊕ In order for Universal Borrowing to work consistently throughout the I-Share consortium, configuration of the policies for the circulating UB Patron Groups in your database should follow the following model:

⊕ UBReg: Make policies for this group equivalent to your Undergraduate patron group (or the groups closest to that type of patron in your database)

⊕ UBLong: Make policies for this group equivalent to your Faculty patron group (or the groups closest to that type of patron in your database)

⊕ UBIN: Make policies for this group equivalent to your Undergraduate patron group (or the groups closest to that type of patron in your database). UBIN represents the ILLINET Libraries and Regional Library Systems who are eligible to borrow via I-Share.

Patron Rules Descriptions:

⊕ Fines/Lost Item Fees Apply: This box must be checked for the fineable UB patron groups.

⊕ Max Outstanding Balance: For UB patron groups, this should be $200.00

⊕ Min Balance for Notice: This should be set at $20 for UB patron groups.

⊕ Courtesy Notices Apply: Policies for your local patrons may vary, but this value should be checked for the UB patron groups.

⊕ Overdue Notices Apply: Policies for your local patrons may vary, but this value should be checked for the UB patron groups.

⊕ Max Items borrowed: Policies for your local patrons may vary, but this value should be left blank for the UB patron groups.

➡ Max Overdue Recalled Items Apply: Optional

➡ Max Overdue Recalled Items: Optional (required if Max Overdue Recalled Items Apply is selected)

➡ Max Number of Recalls Apply: Optional

➡ Max Number of Recalls: Optional (required if Max Number of Recalls Apply is selected)

➡ Max Self-Shelve Returns Apply: Optional

Legend:
⊕ Consortial Rule for setting value(s)
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⃠ Does not apply; Or, Do not change this value
➡ FYI, explanation
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➡ Max Self-Shelve Returns: (required if Max Self-Shelve Returns Apply is selected)

➡ Max Claimed Returns Apply: Optional

➡ Max Claimed Returns: (required if Max Claimed Returns Apply is selected)

➡ Max Lost Items Apply: Optional

➡ Max Lost Items: (required if Max Lost Items Apply is selected)

☑ Max Call Slip Requests Apply: Recommended this box be left blank.

➡ Max Call Slip Requests: Optional, If you must set limits, set the UB groups equivalently to their "model" local groups (e.g., UBReg=UG; UBLong=FC, UBIN=UG)

⊘ Max Short Loans Apply: I-Share Libraries do not use Short Loan.

⊘ Max Short Loan Titles Apply: I-Share Libraries do not use Short Loan.

⊘ Max Short Loans Per Day Apply: I-Share Libraries do not use Short Loan.

➡ Max Overdue Items Apply: Optional

➡ Max Overdue Items: (required if Max Overdue Items Apply is selected)

⊕ Place Holds Using the OPAC: Leave this box blank. CARLI is not recommending the implementation of the Voyager OPAC "Hold" at this time.

⊕ Place Recalls Using the OPAC: Leave this box blank. CARLI is not recommending implementation of Recalls from the OPAC.

⊕ Place Call Slip Requests Using the OPAC: Check this box for any local patron group that will be enabled to place requests for local items from the OPAC (Local Callslip).

⊘ Place Short Loans Using the OPAC: I-Share Libraries do not use Short Loan.

⊕ Email Courtesy Notices: For the UB groups, CARLI requires that this value be checked.

☑ Email Cancellation Notices: For the UB groups, CARLI recommends that this value be checked.

☑ Email Item Available Notices: For the UB groups, CARLI recommends that this value be checked.

☑ Email Overdue Notices: For the UB groups, CARLI recommends that this value be checked.

☑ Email (Other) Overdue Notices: For the UB groups, CARLI recommends that this value be checked.

☑ Email Recall Notices: For the UB groups, CARLI recommends that this value be checked.

☑ Email (Other) Recall Notices: For the UB groups, CARLI recommends that this value be checked.

Items Tab

⊘ Short Loan: I-Share Libraries do not use Short Loan.

☑ Replacement Cost: Enter a standard replacement cost for an item of this type.

☑ Order quantity: Leave this box blank.

☑ Reorder point: Leave this box blank.

Matrix Tab

➡ If there is no matrix configured for a specific patron/item combination, the system uses the [all/all] policy.

➡ If you want to prohibit UB requesting for a specific combination, leave the UB check box on those certain item types (e.g., Reserve or Reference) unchecked for the UB patron groups. The majority of UB requests would be prevented from targeting those items.

➡ For the consortially agreed upon definitions for item types:

- item type codes that end with N are designed to represent non-circulating items (e.g., Charge/Renew would be unchecked (or checked but with a zero value for loan period) for all patron groups
- item type codes that end with LR are designed to represent local requests only (e.g., Call Slip would be checked but UB would be unchecked for all patron groups)
- item type codes that end with RE are designed to represent request exempt items (e.g., both Call Slip and UB would be unchecked for all patron groups)

Settings Tab

☑ Charge/Renew: Check this box for those Patron Group/Item Type combinations you want activated for circulation, including UB patron groups. Leave blank otherwise.

☑ Recall: Check those patron group/item type combinations that should be activated for recalls from the Circulation client. Leave blank otherwise.

☑ Hold: Check those patron group/item type combinations that should be activated for holds from the Circulation client. Leave blank otherwise.

☑ Call Slip: Check those Patron Group/Item Type combinations that should be activated for local call slip requesting, including UB patron groups. Leave blank otherwise.

☑ UB Check Box: Check those Patron Group/Item Type combinations that should be activated for UB requesting, including UB patron groups. Leave blank otherwise.

⊕ Loan Period: Library choice for local patron groups. For the UBLong, UBReg, and UBIN patron group combinations for UB circulating print materials (requested via I-Share or allowable for UB on-site charging), this value should be set to 28 days [4 weeks]. For non-print materials, this value should be set to 14 days [2 weeks].

⊕ Renewal Period:
- Library choice for local patron groups.
- For UB circulating print materials (requested via I-Share or allowable for UB on-site charging)For the UBLong, UBReg, and UBIN patron group combinations, this value should be set to 28 days [4 weeks].
- For UB circulating non-print materials, this value should be set to 0 days [no renewals].

⊕ Max # of Sequential Renewals:

- Library choice for local patron groups.
- For UB circulating print materials:
  UBReg value = 3;
  UBLong value = 6;
  UBIN value = 3.
- For UB circulating non-print materials, the value = 0 for UBReg, UBLong, and UBIN.

➡ Fine Interval: Optional for local patrons. Leave blank for UB Patron groups.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 13

⊕ Fine Rate: Optional for local patrons. No fines are assessed for UB loans to UBReg, UBLong, and UBIN; set as zero for UB Patron groups.

➡ Max Fine Amount: Optional for local patrons. No fines are assessed for UB loans; leave blank for UB Patron groups.

➡ Max Fine for Recalls: Optional for local patrons. No fines are assessed for UB loans; leave blank for UB Patron groups.

➡ Min Loan Period for Recalled Items: Optional for local patrons. No fines are assessed for UB loans; leave blank for UB Patron groups.

➡ Recall Fine Interval: Optional for local patrons. No fines are assessed for UB loans; leave blank for UB Patron groups.

➡ Recall Fine Rate: Optional for local patrons. No fines are assessed for UB loans; leave blank for UB Patron groups.

➡ Grace Period: Optional for local patrons. No fines are assessed for UB loans; leave blank for UB Patron groups.

➡ Recall Return Interval: Optional for local patrons. No fines are assessed for UB loans; leave blank for UB Patron groups.

➡ Recall Grace Period: Optional for local patrons. No fines are assessed for UB loans; leave blank for UB Patron groups.

⊕ Renew From: Either choice for local patrons. For the UB patron groups, use the Original due date.

Intervals Tab

⊕ Courtesy Notice Interval: For the UB patron groups, set the interval to 7 days. Library choice for local patrons.

➡ Minimum Loan for Courtesy: Set at 0 for UB patron groups. Library choice for local patrons; if you choose not to send out courtesy notices, make sure that the Minimum Loan for Courtesy field is set to a value higher than your longest loan period.

⊕ First Overdue Interval: For the UB patron groups, set the interval to 7 days. Library choice for local patrons.

⊕ Lost Interval: For the UB patron groups, set the interval to 29 days. Library choice for local patrons.

⊕ Other (Overdue) Notice Interval: For the UB patron groups, set the interval to 7 days. Library choice for local patrons.

⊕ Other (Overdue) Notice Count: For the UB patron groups, set the count to 1. Library choice for local patrons.

➡ Overdue Recall Notice Interval: Optional

➡ Overdue Recall Notice Count: Optional

⊕ Hold Shelf Life: For the UB patron groups, set the interval to 14 days. Library choice for local patrons, but not less than 14 days.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 14

Short Loan Matrix Tab

⊘ I-Share libraries do not use Short Loans. Leave the settings blank.

7. Request Groups

⊘ CARLI recommends that this section be left blank.

8. UB Policy Definitions

➡This section focuses on setting up the general resource sharing parameters in your library's database. Both your library's local patron groups and the UB patron groups in your database will need to be configured.

➡In order to make Universal Borrowing (UB) work consistently throughout the I-Share libraries, the UB policy configuration for each member library should follow the recommended pattern so that the settings are identical in all I-Share databases.

⊕ UB Eligible:

⊕ Leave blank (unchecked) for the following patron Groups (and their equivalents if using pre-existing patron group codes): LB: Local BUO; LH: Local High Privilege; LL: Local Low Privilege; PP: Problem Patron; II: Int'l ILL; IL: Interlibrary Loan; LU: Local Use.

⊕ Check as appropriate for your library other patron groups, those that will be eligible for UB activity, you will need to indicate that they are eligible to place UB requests.

➡ Once you have clicked UB Eligible and saved the change, a check sign 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.

➡ Once a patron group has been marked as UB Eligible, the remaining UB Policies should be configured in all I-Share databases with identical values as shown below.

⊕ UB Fines/Lost Item Fees Apply: Max outstanding balance of $200

⊕ Max UB Demerits Apply: Leave blank (unchecked). I-Share libraries do not use demerits.

⊕ Max UB Items Borrowed Apply: Leave blank (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.

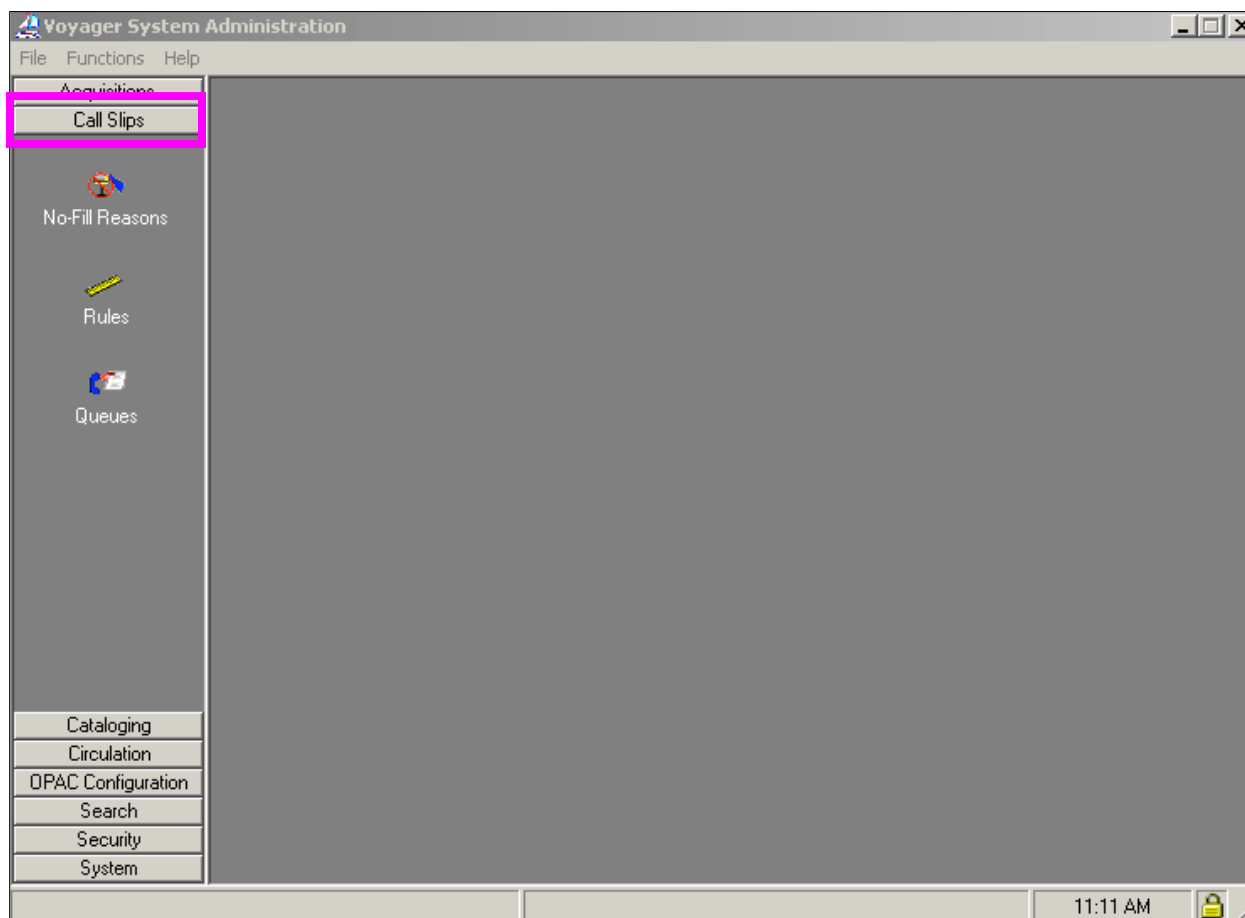⊕ Max UB Lost Items Apply: Check, with a value of 3 Max

⊕ Max UB Requests Apply: Leave blank (unchecked).

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 15

Part 4: Call Slips

Document Sections:
Preface
1. Creating a Call Slip Queue
2. Assign locations to the Call Slip Queue
3. Determine the rule order
4. Update no-fill reasons
5. Review rules for creating and maintaining Call Slip Queues

NOTE: Screen shots that appear throughout this document have been taken from a variety of databases. The settings do not always represent the values your library should be using for your policies. I-Share rules and recommendations for settings (when applicable) are found in the explanations of each chapter of the I-Share System Administration documentation.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 16

Preface

> *The setup for Call Slips **does not depend** on whether or not your library allows local "paging" (i.e., when your patrons are allowed to request your library's items through the OPAC). The option to allow or disallow paging is set up in the circulation policy definitions [patron rules tab].*
>
> ***Call Slips must be set up***; *otherwise your library will not receive requests from other libraries' patrons via Universal Borrowing (UB). The circulation matrix can be configured to prevent call slips and UB requests from targeting non-circulating items.*

A Call Slip Queue is a list that holds item requests currently pending for your library. If there are more than one HAPPENING Locations defined in your library's System Administration module, you may want to set up a separate Call Slip Queue for each of those HAPPENING Locations. This is recommended if those HAPPENING Locations exist in Branch sites.

To each Call Slip Queue created, assign the storage/shelving locations that should be designated to that Call Slip Queue. The Call Slip staff module will:

- Receive each request,
- Identify the storage/shelving location for the item requested,
- Determine which Call Slip Queue should queue the request based on the location, and
- Assign the request in the correct Call Slip Queue.

Call Slip module staff workflow is described in "Request Processing While in the Call Slip Daemon" on the Circulation/UB/ILL documents page on the CARLI website at:
http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/CSdaemon-mf.pdf

Every storage/shelving location that can be targeted for a call slip or UB request must be assigned to a Call Slip Queue, and every Call Slip Queue must be assigned at least one location.

More information about setting up Call Slips in System Administration is available in the *Voyager 7.2 System Administration User's Guide*.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 17

1. Creating a Call Slip Queue

Every location that could receive a call slip or UB request must be assigned to a Call Slip Queue.

To create a Call Slip Queue, open the System Administration client.
Go to System Administration-> Call Slips-> Queues
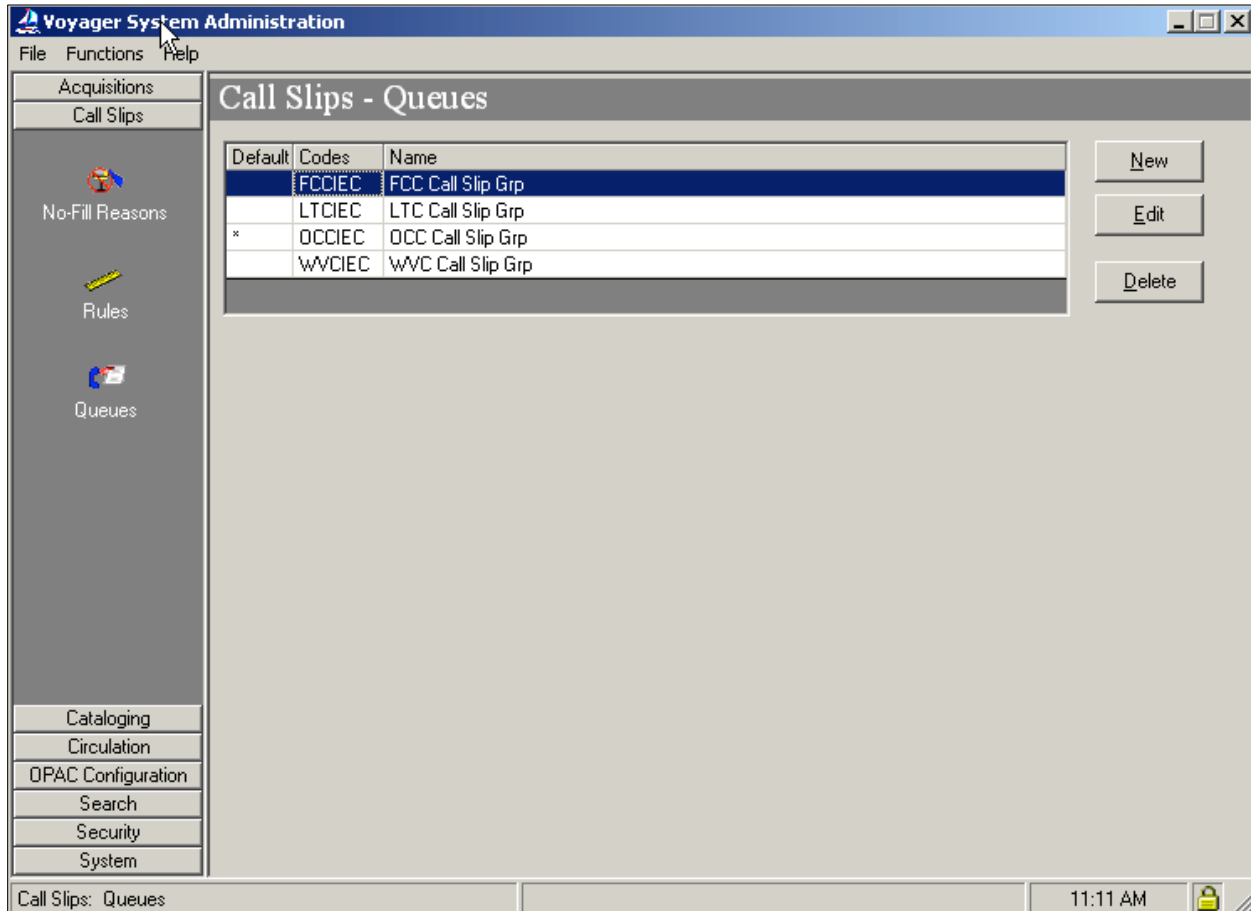
In the example above, there are four Call Slip Queues defined:
1. FCCIEC Call Slip Grp
2. LTCIEC Call Slip Grp
3. OCCIEC Call Slip Grp
4. WVCIEC Call Slip Grp

The asterisk (*) indicates the default queue. Any request that Voyager does not know how to route will be sent to the default request group. The usual reason for this is a storage/shelving location that has not been designated to a queue.

All requests for this example library would be routed to one of these four queues.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 18

Click [New] to add a new queue or [Edit] to modify an existing queue.
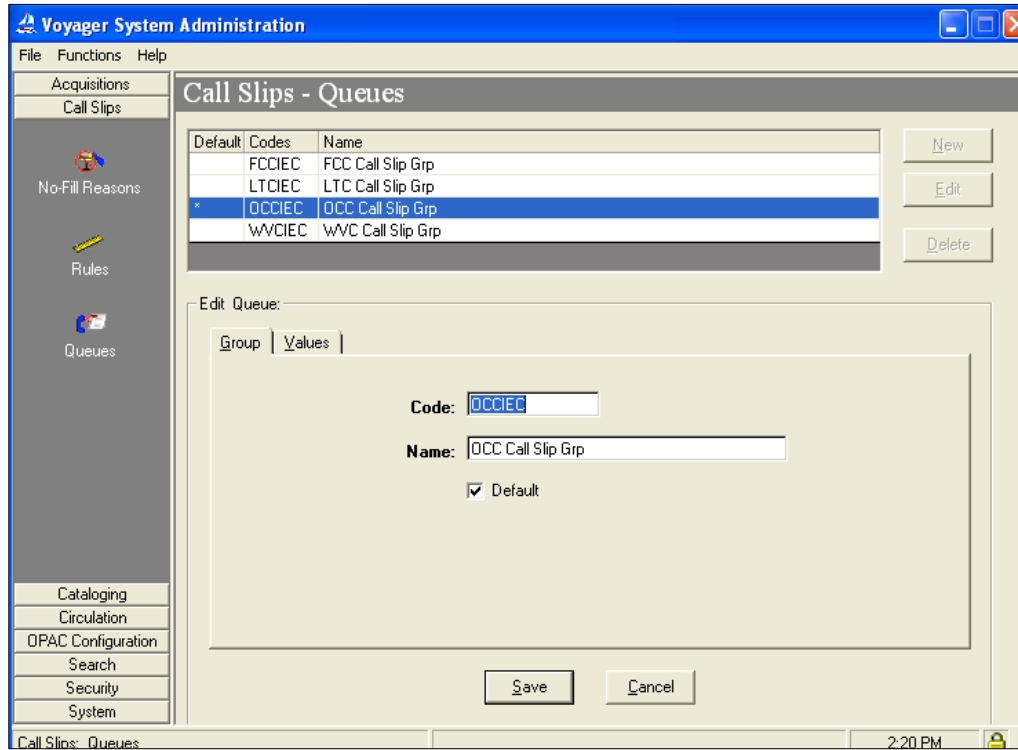
Enter an appropriate Code and Name for the Call Slip Queue(s) in your library. The Code can be up to 10 alphanumeric characters and the Name can be up to 25 alphanumeric characters, including spaces.

Click on the **Values** tab. Populate the values according to the descriptions in the table on the next page:

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 19

FIELD	VALUE TO ENTER	RESULTS
Processing Code	"In Transit for Hold" to destination location	The "Processing Code" determines what an item's status should be when a requested item has been "filled" in the Call Slip module. For I-Share libraries, a filled request should be "In Transit For Hold" until staff at the pickup library have received and discharged the item, putting it on the hold shelf.
Location	*LIBRARY DECISION*	Set this to the appropriate HAPPENING Location; if uncertain, set this to your main circulation HAPPENING Location.
Default Item Type	*LIBRARY DECISION*	Set this to your most commonly requested item type.
Archive Period (in days, hours, or minutes)	14 DAYS **	Length of time that a request will display in WebVoyáge after the request is set to "filled," "unfilled," or "expired." *If set to 0 days, the request will be archived immediately.*
Expire Period (in days, hours, or minutes)	4 DAYS **	Length of time that must pass before a request that has not been processed, or has been set to "unfilled", will be marked as "expired" by CircJob #8.
Include patron info in call slip display	CHECKED	Select this option to indicate that you want to include the patron's name and barcode on the call slip display when the request is processed.
Set cataloging review status on new items	*LIBRARY DECISION*	Select this option to require that any new items created in the Call Slip module be assigned a status of Cataloging Review. The next time an item with Cataloging Review status is discharged in the circulation client, it generates an alert for cataloging review before it is charged again.
Set circulation review status on new items	*LIBRARY DECISION*	Select this option to require that any new items created in the Call Slip module be assigned a status of Circulation Review when viewed in the Circulation module. The next time an item with Circulation Review status is discharged, it generates an alert for a circ review before it is charged again.

** These time intervals are NOT affected by Circulation Calendars; they are based strictly on a 365-day calendar.

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

CARLI Office, rev 6/13/2013
page 20

2. Assign locations to the Call Slip Queue

Local and UB call slips are routed to Call Slip Queues based on the storage/shelving location of the item requested. Every Call Slip Queue must be assigned at least one rule (with a location).

In order for requests to be correctly directed to the right queue, each library must manually assign routing rules for the Call Slip Queues.

To assign each storage/shelving locations to the correct call slip print queue, go to System Administration-> Call Slips-> Rules-> Click New.

Populate the values according to the descriptions in the table on the next page:
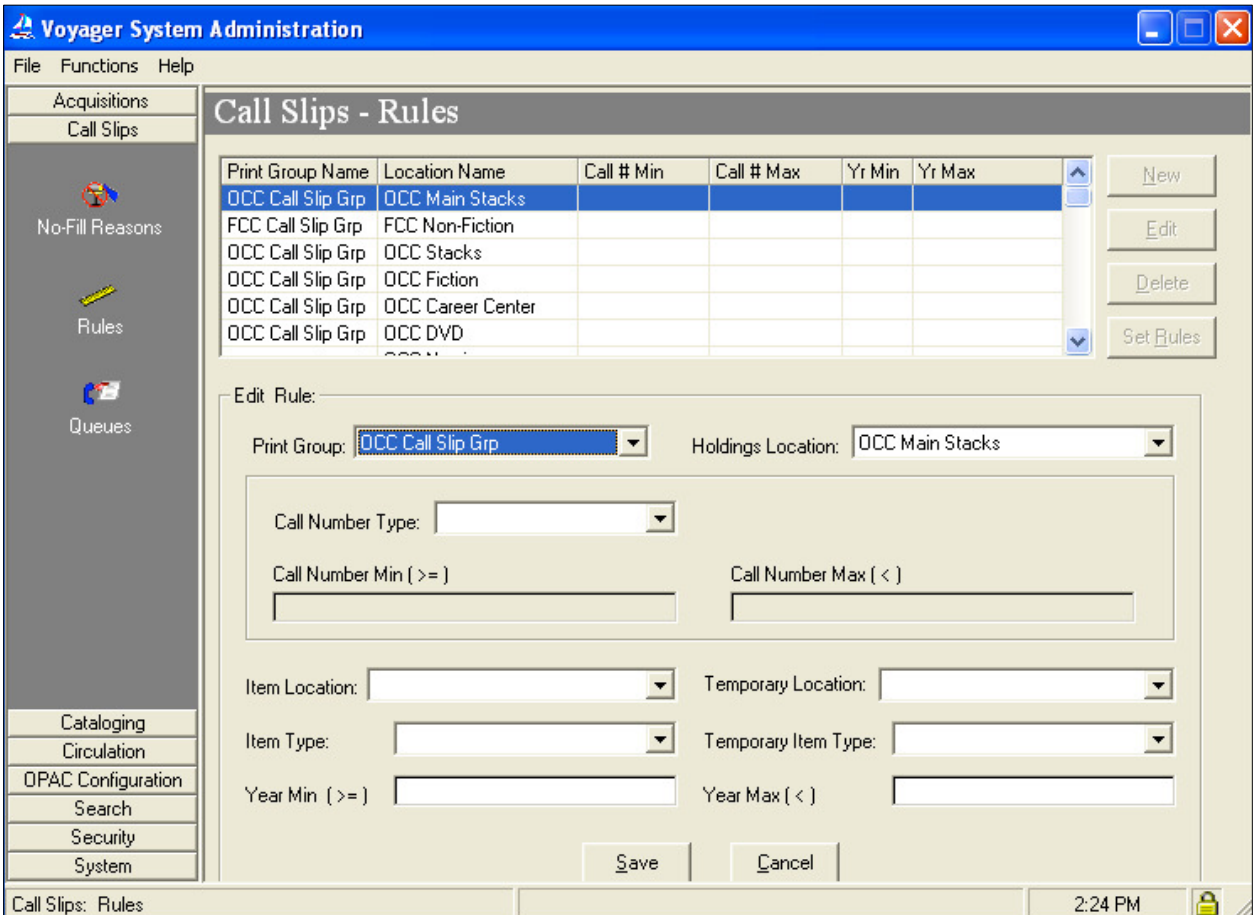
Every storage/shelving location in your collection that may be targeted for a call slip or UB request must be covered by at least one rule.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 21

FIELD	VALUE TO ENTER	RESULTS
Print Group	Mandatory Library Decision	Choose the Call Slip Queue where you will be processing requests for items from this holding (storage/ shelving) location.
Holdings Location	Mandatory Library Decision	List a holding location that may have items targeted from a call slip or Universal Borrower request.
Call Number Type Call no. Min (>=) Call no. Max (<)	*OPTIONAL*	
Item Location	*OPTIONAL*	These rules limit the items that are requestable in this location by item-specific information
Item Type	*OPTIONAL*	
Temporary Item Location	*OPTIONAL*	If all items in this holding [shelving/storage] location are requestable, then leave these optional values blank
Temporary Item Type	*OPTIONAL*	
Year min (>=) Year max (<)	*OPTIONAL*	

Remember that requests will not target item types that are not defined for "charge/renew" in the circulation policy matrix.
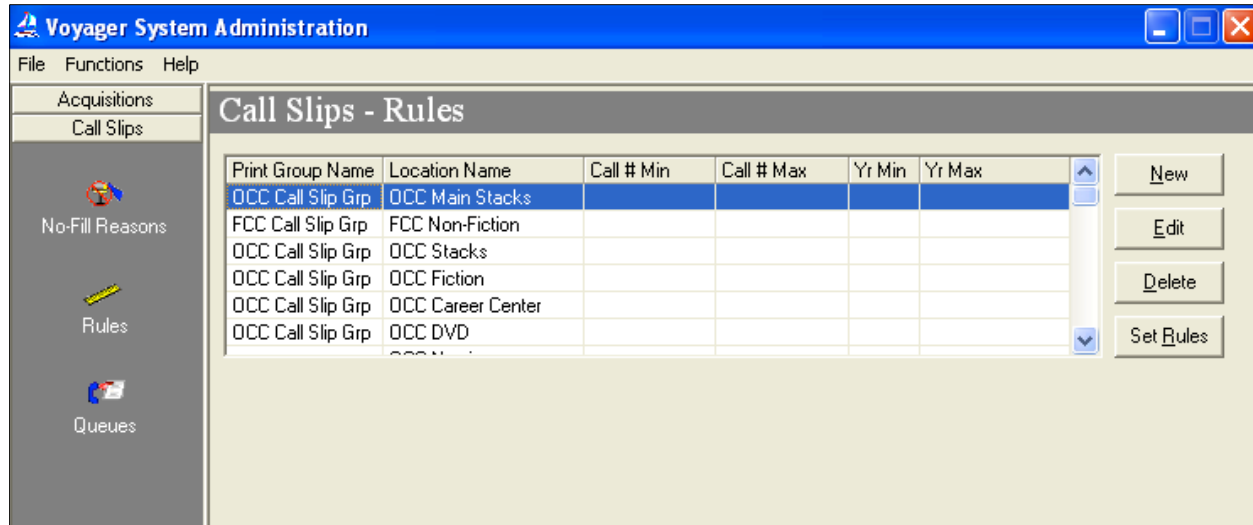
Legend:
  ⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
  ☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 22

3. Determine the rule order

Once all the Call Slip Rules are defined, determine the order in which the rules should be applied.
Go to System Administration-> Call Slips-> Rules

Click [Set Rules]. To change the order of a rule, select it and click the Priority arrows either up or down until the rule is in the correct order. In general, prioritize the rules list from the largest collection locations on down to the smallest. The order is particularly important if you have more than one callslip queue. The callslip will be sent to the queue represented by the first rule where it meets the criteria.
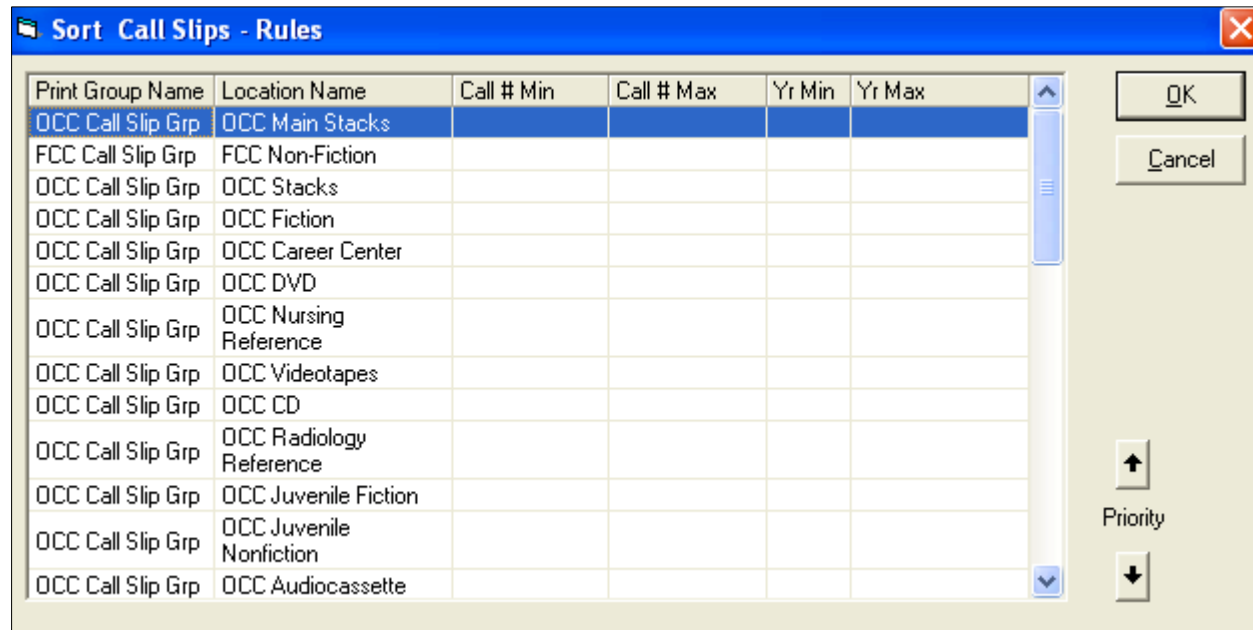
Legend:
    ⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
   ☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 23

4. Update no-fill reasons

Note: By default, Voyager has several pre-configured No-Fill Reason codes. Please update them to match the information below.

All I-Share No-Fill Reason Descriptions must contain the phrase "…: Seeking next available copy", after the initial description of the reason.

Go to System Administration / Call Slips /No-Fill Reasons.

Click [New] to add a new No-Fill Reason or [Edit] to update an existing No-Fill Reason
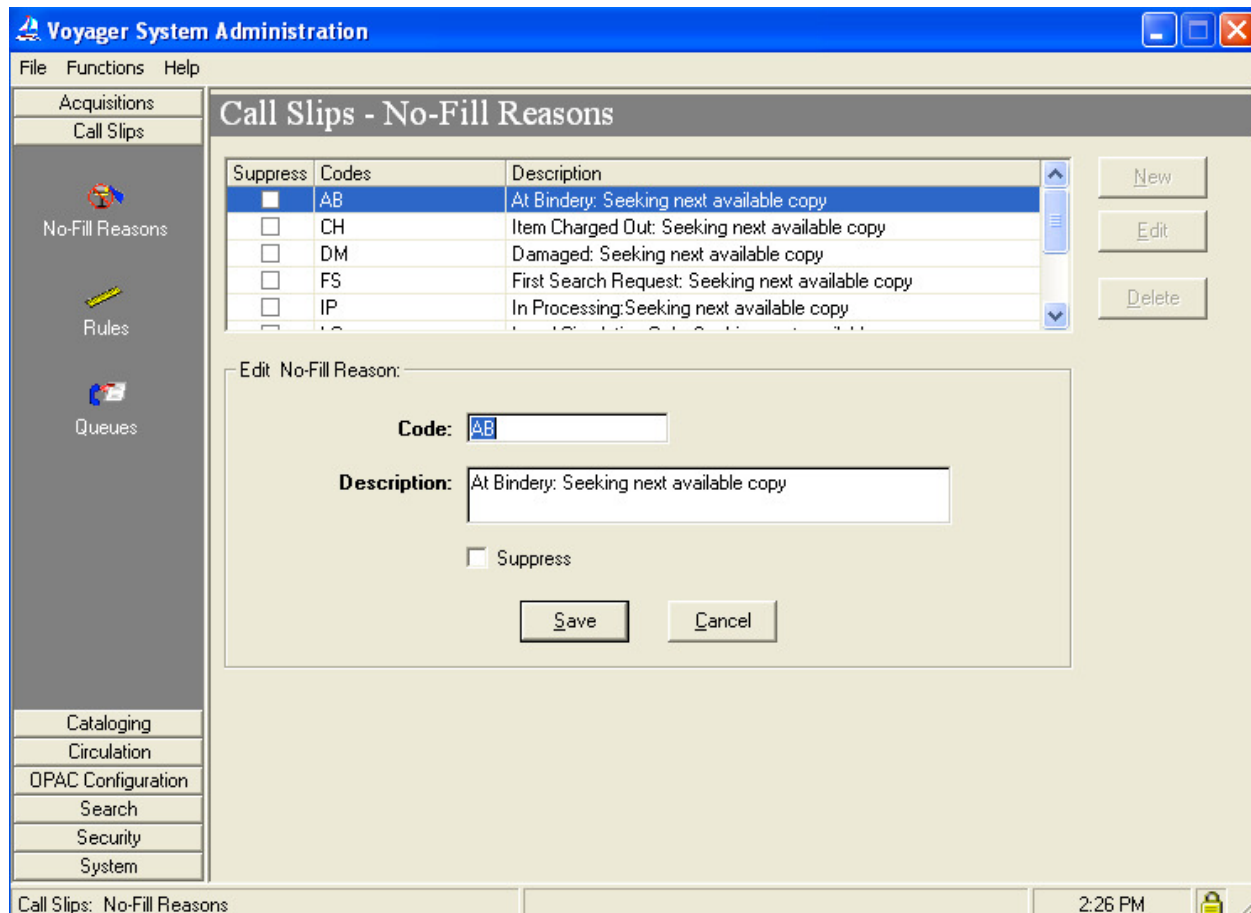
Libraries are free to create as many No-Fill Reasons as they need, but each database should have at least the following codes and descriptions:

AB At Bindery: Seeking next available
CH Item Charged Out: Seeking next available
DM Damaged: Seeking next available
LO Local Circulation Only: Seeking next available
MS Missing / Not on Shelf: Seeking next available
NC Noncirculation Item: Seeking next available

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 24

5. Review rules for creating and maintaining Call Slip Queues

1. Keep the rules as simple as possible.
2. For every location which may receive a call slip or UB request, there must be at least one rule.
3. It is not necessary to have a 'call slip queue'[for local paging requests] and a 'UB queue'. All requests for a location print to the same place.
4. If you don't need complex rules, don't create complex rules. Don't fill in item types, call number ranges, etc. unless a different call slip Queue pulls those items.
5. Rule order is important. A slip prints to the first call slip group it finds with appropriate criteria so put locations with specific criteria before locations with no added criteria.
6. Simpler is better. If the remaining fields can be left blank, do so:

   Holdings location: Required. Make a rule for every location with items that could be targeted for requests.

   Call number type: LC, DDC, etc. Leave blank if all call number classifications in this location may be targeted for requests.

   Item location: Recommend leaving blank – Only use if the item permanent location is different from the holding [MFHD] location, which not recommended as a cataloging decision.

   Item type: Recommend leaving blank. Otherwise, if one type of item that circulates is requestable within this location (but another which circulates is not), list the item type that is requestable. Note: the circ matrix will keep call slips and UB requests from being made against non-circulating items.

   Temporary location: Recommend leaving blank. If this and item location are set, both must match the item record in order for a call slip to be accepted in this queue.

   Temporary item type: Recommend leaving blank. Note: the circ matrix will keep call slips and UB requests from being made against non-circulating items.

   Year min (>=) / max (<): Recommend leaving blank – This would allow requests to be printed only for items published during or before/after certain years.

Legend:
⊕ Consortial Rule for setting value(s)   ⃠ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 25

Part 5: Search and OPAC Reference Pages: S.A. 7.2, pages 7-1 to 8-92

➡The sections in this chapter are arranged in the order that the different parts should be edited when a library is first implementing Voyager as an I-Share participating library. Some parts of Search SysAdmin build upon each other, so doing the initial data entry work in the order outlined in this document should make this process more efficient for library staff.

➡Much of the work to configure your WebVoyáge (OPAC) instance is done by CARLI and/or Ex Libris staff; however, there are several steps that must be done by library staff to support WebVoyáge. The following document will describe those steps and some of the optional configurations you might wish to do.

Search

1. **Required Database Definitions**
   ➡ Databases "defined" in your SysAdmin are databases from which you can read data in your instance of WebVoyáge or in your Voyager staff clients. CARLI will create definitions for each of the other I-Share databases in your SysAdmin as part of your "UB Integration."

   ⊕ **On the Database Tab, double-check the definition of your "Local" database**. If you enable your instance of WebVoyáge to search databases other than your local Voyager database (see optional update #8: Additional Database Definitions), this update will determine the way your institution's name appears in the list of all databases searchable via the OPAC interface.
   - Click on the Database Definitions icon under the Search tab.
   - Choose the LOCAL database (at the top of the list) and click on [Edit].
   - Edit the NAME section of the Database tab. The maximum number of characters that can be entered in the Name field is 110.
   - Click Save.

2. **Required Search Configurations**
   ➡ When Ex Libris migrates your data they will build all the indexes (with all the "search configurations") that are present in every other I-Share database. The search configurations set will affect both the OPAC and staff clients and will determine how searches are performed. These search configurations include several left-anchored search as well as keyword search capabilities. To learn more about Voyager indexes in the I-Share environment, please refer to: http://www.carli.illinois.edu/products-services/i-share/opac : Classic (version 6) WebVoyage Searches, Indexes & Displays.

   ➡ Click on the Indexes – Composite Definitions icon under the Search tab to see the different composite definitions available.

   ⊘ Many of these are pre-populated by CARLI and should not be edited. To see the individual "component" search definitions that make up each "composite" definition, choose a definition and click [Edit].

3. **Field Weighting**
   ⊘ CARLI Office staff will edit your field weights. Please do not edit these definitions.

   ➡ CARLI's field weighting was developed by the ILCSO OPAC Customization and the database Reindexing task forces. These field weights are and should be kept consistent across all I-Share databases for consistent searching results. Do not change the assigned field weights.

   ➡ To see field weights, choose the Indexes – Field Weighting icon under the Search tab. A list of MARC subfields and their associated weights will appear.
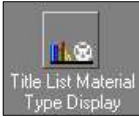
Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 26

4. Material Type Definitions

⊘ CARLI Office staff will add material type definitions to your Voyager instance. Please do not edit these definitions.

➡ Material type definitions are translations of MARC record type and bib-level code combinations that display in the Format column on the Titles page in WebVoyáge. CARLI's definitions keep these code translations in sync with WebVoyáge format limit options and are consistent across all I-Share catalogs.

5. Circulation Changes for WebVoyage

➡ These changes should already have been completed in Part 3: Circulation and Universal Borrowing.

OPAC Configuration

6. Optional Updates: Local Call Slips

➡ The first of the OPTIONAL updates you may wish to make is to enable Call Slip requesting. A call slip request allows your patron to request your items from your catalog. Library staff process Call Slip requests, pull items from the shelf to fill the requests, and hold the items for the patron to pick up. Most I-Share libraries support Call Slip requests.

➡ Local Call Slips are similar to UB Call Slips in that they both initiate staff retrieval of material and the call slip request print through the Call Slip client.

➡ If your institution wants to support Call Slip requests, you must configure the Call Slip Form itself and check one or two settings in the "Miscellaneous" tab of SysAdmin. You also have to check "Call Slip" in the Patron Group-Item Type policy matrix.

⊕ Please notify CARLI when you decide whether or not to allow Call Slip requests so CARLI can correctly configure the union catalog.

☑ If you choose to allow local Call Slip requesting in your local catalog, the following are the steps you must take to enable it:

Call Slip Enabling Steps:

1. Click on the Miscellaneous icon under OPAC Configuration.
2. Check the box next to "Allow On-shelf OPAC Holds." (This is another name for Call Slip requests and differs from plain Voyager "Holds." Plain "Holds" are placed against charged items. On-shelf OPAC Holds are requests placed against items that are available and on-shelf.)
3. Click [Save] to save your changes.

➡ After you have allowed On-shelf OPAC Holds, you next need to customize your Call Slip form. The Call Slip form is the form seen by your users in your instance of WebVoyáge when they request your materials.

Call Slip Form Customization Steps:

4. Choose the Request Forms icon under the OPAC Configuration tab.
5. Highlight the Call Slip line ("callslip" under the Codes heading) and click [Edit]
6. Change the Form Name to "Request X's Copy" where X is your institution's name.
7. Change the Instructions to something like the following suggested text: "Please be sure to supply information in every bold-labeled field."
8. NOTE: Changes on the Fields tab are usually not necessary.
9. Click [Save] to save your changes.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 27

☑ If you choose to allow local Call Slip requesting in your local catalog, you need to decide whether you want to enable the "Call Slip Item Requested" Option:

➡ Libraries that choose to allow Call Slip requesting also face the decision of whether or not to allow Call Slip requests in WebVoyage for objects that are not described by an item record. (Libraries that do want to allow Call Slip requests on serial volume holdings for which item records do not exist, for example, would not want to check "Call Slip Item Required.") Checking "Call Slip Item Required" affects when users see the Call Slip Request Form and what the form looks like when they do see it.

➡ Note that VuFind requires an item record to be present in order to process a request; the "Call Slip Item Required" setting (even if left unchecked) has no effect on VuFind.

➡ For more information on "Call Slip Item Required," see S.A. 7.2, page 7-21.

Example: "Call Slip Item Required" Is Checked

If "Call Slip Item Required" is checked, then the Call Slip Request form is simpler (it lacks a row where users can type in the enumeration or chronology of the requested piece) and Bib/MFHDs without items attached are not requestable. Although users can begin a request, after selecting the Call Slip request type they see:

Your request failed in this library's catalog. No items are available for requests.

Additional copies may be available at other sites.

Example: "Call Slip Item Required" Is Not Checked

If "Call Slip Item Required" is not checked, the Call Slip form is more elaborate and Call Slip requests are possible even when no item record is present. The following are two examples from the OPAC:

Example when request is possible without item record present, more elaborate form (user chooses item or supplies information)

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 28

Example when request is possible without item record present, basic form (user supplies information)

	Library Catalog Request: **Request DePaul's Copy**	
Title:	ILCSO test record	
Instructions:	Please be sure to supply information in every **bold-labeled** field.	
⊙ **Specify an item** (if not listed above):	**Volume** [ ] **Date** [ ] **Year** [ ]	
Choose pick-up library:	LPC CIRCULATION ▾	
Library Borrower ID:	[ ]	
Note:	[ ]	
	Submit Request Clear Form	

☑ If you choose to enable the "Call Slip Item Required" in your local catalog, the following are the steps you must take to enable it:
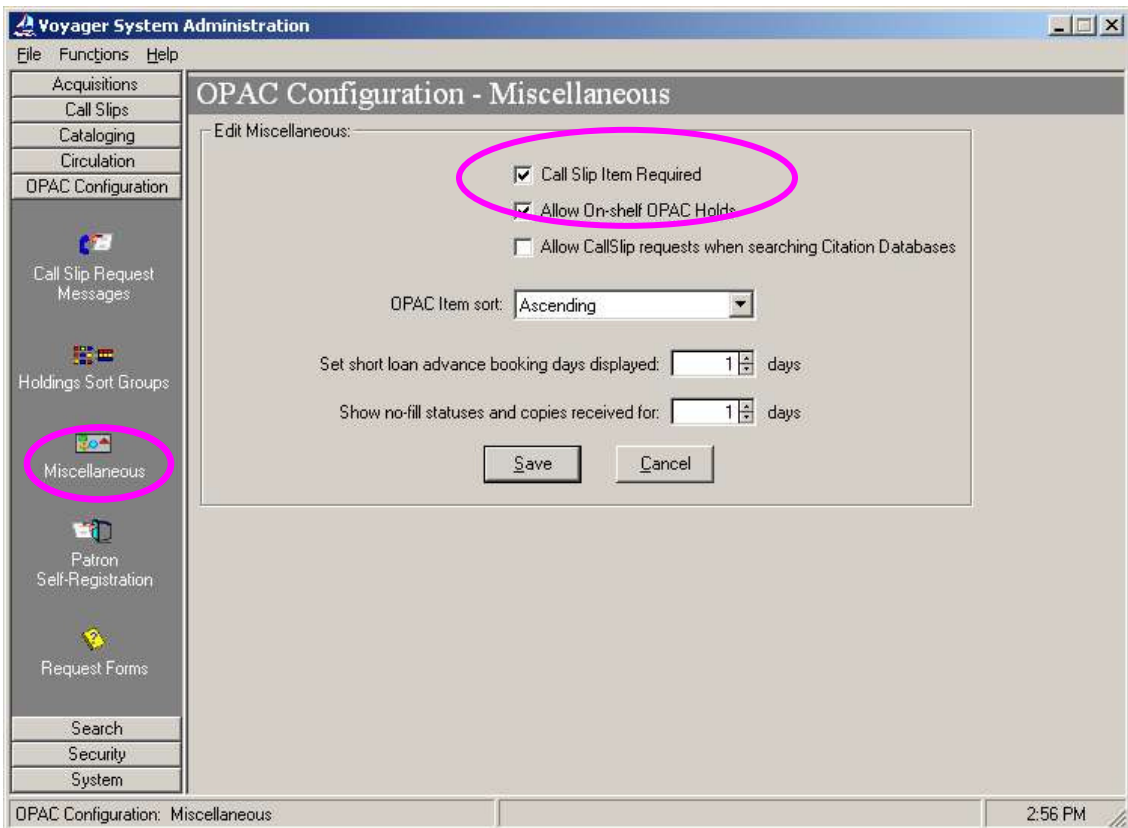
1. Click on the Miscellaneous icon in the OPAC Configuration tab.
2. Tick the box next to "Call Slip Item Required."
3. Click [Save] to save your changes.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 29

☑ If you choose NOT to enable the "Call Slip Item Required" in your local catalog, the following are the steps you must take to assist patrons in submitting the proper citation information, or choosing required fields when call slip item not required

> Libraries that choose to allow local Call Slip requesting AND to allow Call Slip requests for objects that are not described by an Item Record ("Call Slip Item Required" is left unchecked) face another decision: which fields to require when users specify the piece they want to request.
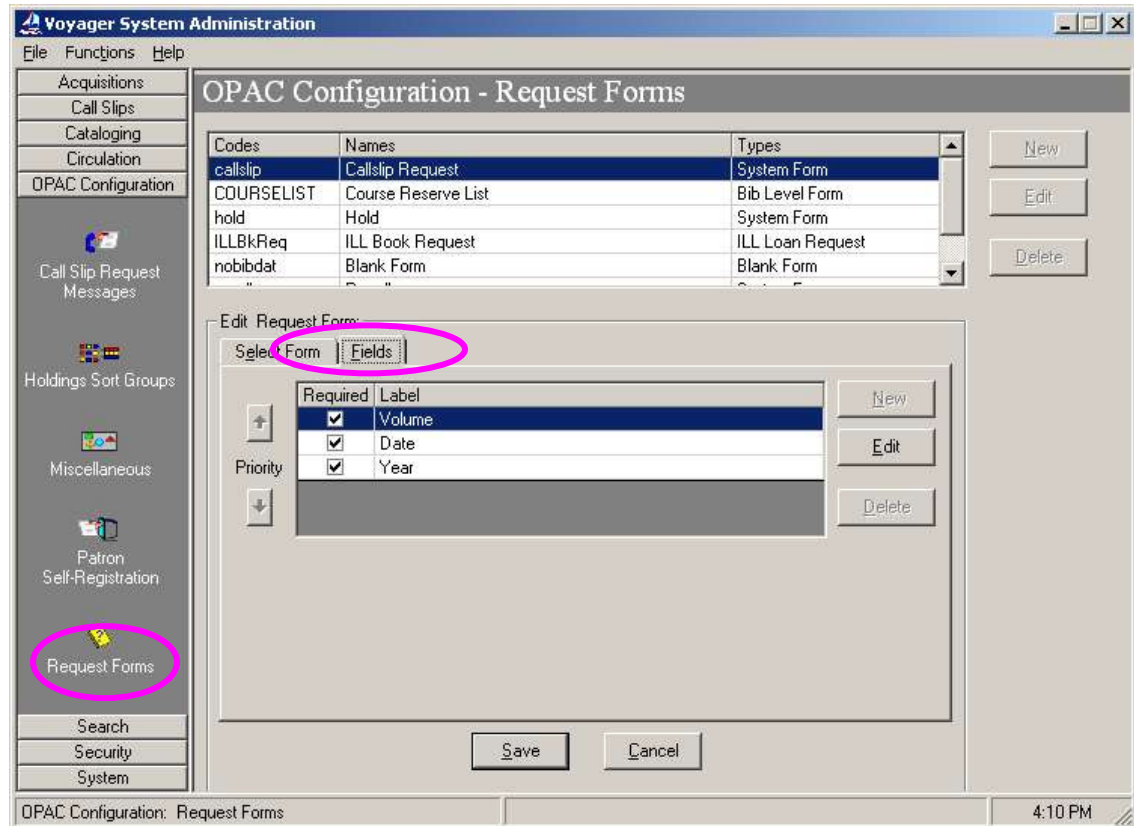
1. Choose the Request Forms icon under OPAC Configuration.
2. Choose the Call Slip (Code = "callslip") line and click [Edit].
3. Click on the "Fields" tab.
4. Choose the field you want to edit and click [Edit].
5. Click [Save] once you have made all your changes.

7. **Optional Updates: Additional Request Forms**
   ➡ Since new I-Share libraries' patrons will most likely use VuFind more often than WebVoyáge, CARLI generally discourages implementing additional request forms in WebVoyáge.

   ☑ If you would like to implement more request forms, visit http://www.carli.illinois.edu/products-services/i-share/sysadmin, Part 5: OPAC, Section IX on page 21.

8. **Optional Updates: Additional Database Definitions**
   ☑ Additional database definitions can be added to your Voyager instance. Consult S.A. 7.2 pages 8-17 through 8-36 for more information.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 30

9. **Optional Updates: Additional Search Configurations**
    ☑ Your institution can create new composite or keyword searches and add them to your local WebVoyáge. If you would like to implement additional search configurations, visit http://www.carli.illinois.edu/products-services/i-share/sysadmin, Part 5: OPAC, Section XI on page 24.

    ⊘ Individual institutions may not modify the searches that are used in "I-Share Local Default" WebVoyáge. Requests for new left-anchored indexes should go to the I-Share Users' Group (IUG) for consideration.

10. **Optional Updates: Title List Column Names**
    ☑ Don't worry about this one at all. But if you want to worry about it, visit http://www.carli.illinois.edu/products-services/i-share/sysadmin, Part 5: OPAC, Section XII on page 26.

11. **Optional Updates: Location Limit Groups**
    ➡ Location Limit Groups appear as limit options on the "More Limits" page in WebVoyáge, and as location facets in VuFind, unless they are OPAC Suppressed. Location Limits can also be listed in the Quick Limits list in WebVoyáge.

    ☑ Your library can choose which Location Limit Groups would be useful for your library.

    ➡ For more information, see: http://www.carli.illinois.edu/products-services/i-share/opac/vf-loc-facets or http://www.carli.illinois.edu/products-services/i-share/opac/wv-cust-within-dflt-wv6#loc_limits. Limit Groups can be groups of one or many holding locations taken from MFHD records.

    ➡ For even more information, see S.A. 7.2 pages 10-64 through 10-69.
    ☑ Steps to set Location Limit Groups:
    1. Choose the Location Limit Groups icon under System.
    2. Click [Edit] to edit an existing group or [New] to add a group.
    3. Click [Save] after making necessary changes.

12. **Optional Updates: Holdings Sort Groups**
    ☑ No I-Share Libraries are currently using Holdings Sort Groups.

    ➡ If interested, visit http://www.carli.illinois.edu/products-services/i-share/sysadmin, Part 5: OPAC, Section XVI on page 31.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 31

Part 6: Cataloging Reference pages S.A. 7.2, pages 4-1 through 4-68

Use this section to learn the I-Share consortial requirements and recommendations for the settings in the Cataloging portion of the System Administration module.

1. **Authority Duplicate Detection Profiles**

⊕ There is one Authority Duplicate Detection Profile that all I-Share libraries should add:

    Profile Tab

        ⊕ Enter the following data:

            Profile Name: AuthReplace
            Profile Code: AUTHREP (Note: this value is case sensitive)
            Duplicate Handling: Replace
            Discard incoming records… Do not check/enable this option
            Cancellation: None
            Duplicate Replace: 100
            Duplicate Warn: 25

        ☑ The option to "Discard incoming records that do not match existing records" appears in this profile due to the Duplicate Handling value of Replace. The CARLI Office recommends that libraries <u>not</u> enable this option in the AuthReplace authority duplicate detection profile. If this option were to be enabled in this profile, any incoming authority records processed with this profile that did not match existing records in the database would be discarded, instead of added as new records.

    Field Definitions Tab

        ⊕ Highlight each of the following fields individually, and then click the right arrow to move the entry to the box on the right:

            A35O, field weight 100
            ATID, field weight 100
            A10A, field weight 100
            A10Z, field weight 25

        ⊕ The default field weight is set at 100 as each entry is selected. For the last entry above, be sure to edit the field weight as indicated.

        ➡ After the entries have been selected, be sure to double check the field weight values for each field, because it is easy to set the wrong field weights in this process.

2. **Bibliographic Duplicate Detection Profiles**

⊕ There are three Bib Duplicate Detection Policies that all I-Share libraries should add. These are described in section III.D, below.

➡ For each profile described below, highlight each of the fields listed individually, and then click the right arrow to move the entry to the box on the right. Be sure to edit the field weights as indicated; the default field weight is 100, but many fields require a different value.

➡ After the entries have been selected, <u>be sure to double check the field weight values for each field</u>, because it is easy to set the wrong field weights in this process, which could produce undesirable or unexpected results during manual or bulk imports of bibliographic records.

    Profile #1 – OCLC Conditional
    Profile Tab
        Enter the following data:
            Profile Name: OCLCConditional

Legend:
  ⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
  ☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 32

Profile Code: OCLCCON (Note: this value is case sensitive)
Duplicate Handling: select Add-Conditional
Cancellation: select OCLC
Duplicate Replace: 100
Duplicate Warn: 10

➡ The option to "Discard incoming records that do not match existing records" remains grayed out in this profile, because that option only applies to profiles whose Duplicate Handling setting is Replace or Merge.

Field Definitions Tab
Enter the following data:
010A, weight 10
022A, weight 10
024I, weight 10
028A, weight 10
0350, weight 100
035A, weight 100, field override = 019, subfield override = a
BBID, weight 100
ISB3, weight 10

Profile #2 – OCLC Replace
Profile Tab
Enter the following data:
Profile Name: OCLCReplace
Profile code: OCLCREP (Note: this value is case sensitive)
Duplicate Handling: select Replace
Cancellations: select None
Duplicate Replace: 100
Duplicate Warn: 75

➡ The option to "Discard incoming records that do not match existing records" is new with Voyager version 5 and higher. This option appears in this profile due to the Duplicate Handling value of Replace. CARLI recommends that each library determine for itself whether this option should be checked/enabled.

➡ If the Discard incoming records… option is enabled, any incoming bibliographic records that do not match an existing record in the database are not added as new records, but instead are discarded. If the Discard… option is not enabled, any incoming bib records that do not match an existing record in the database are added as new records. The Ex Libris default is that this option is not enabled.

➡ CARLI believes that this option might be more useful to libraries that use bulk import for special projects, such as projects that involve extracting bib records from the Voyager database and then re-loading the bibs after some time has past. If the library wishes to keep the Discard incoming records… option disabled for routine OCLC loads, but to enable the Discard … option for special loads, a new bibliographic duplicate detection profile should be created. While not required, a naming convention that could be used for this new profile is code REPNOADD with a profile name of ReplaceNoAdd. This naming convention would distinguish the new profile from the existing OCLCReplace profile.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 33

➡ In addition, if the library does create a new bibliographic duplicate detection profile for this Replace No Add processing option, the bulk import rule that uses this dup detection profile must also be revised to point to the REPNOADD profile. See section 5 for more information about setting the duplicate detection profile in a bulk import rule.

Field Definitions Tab
Enter the following data:
010A, weight 10
022A, weight 10
024I, weight 10
028A, weight 10
0350, weight 100
035A, weight 100, field override = 019, subfield override = a
BBID, weight 100
ISB3, weight 10

Profile #3 – OCLC Conditional Bulk
Profile Tab
Enter the following data:
Profile Name: OCLCCondBulk
Profile Code: OCLCCONB (Note: this value is case sensitive)
Duplicate Handling: select Add-Conditional
Cancellation: select OCLC
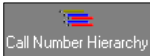Duplicate Replace: 100
Duplicate Warn: 30

➡The option to "Discard incoming records that do not match existing records" remains grayed out in this profile, because that option only applies to profiles whose Duplicate Handling setting is Replace or Merge.

Field Definitions Tab
Enter the following data:
010A, weight 20
022A, weight 15
024I, weight 10
028A, weight 10
0350, weight 100
035A, weight 100, field override = 019, subfield override = a
BBID, weight 100
ISB3, weight 25

3. Call Number Hierarchy
☑ This is likely already set for your library. Libraries will need to set up any call number hierarchies needed. If not set, visit: http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/cat.pdf p. 11

4. Cataloging Policy Definitions
☑ This is likely already set for your library.

☑ It is recommended that libraries select all available call number hierarchies for all policy definitions created. This setting is located on the Default Policies tab.

☑ It is recommended that libraries select all available duplicate detection profiles for all policy definitions created. This setting is located on the Duplicate Detection Tab.

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 34

5. **Bulk Import Rules**

   ☑ If your library intends to do batch loading of bibliographic records from OCLC or other vendors, please read the SysAdmin documentation available here: http://www.carli.illinois.edu/products-services/i-share/sysadmin, Part 6: Cataloging, Section V, page 21. Feel free to contact CARLI for support.

6. **Item Type Abbreviations**

   ➡ The Item type names listed below are the generic I-Share names; some I-Share libraries have changed the item type names within their Voyager database, so the Item type names below may not apply to all libraries. Also, migrating Voyager libraries will have locally defined item types.

   ➡ This chart lists the valid Voyager item type code abbreviations for use in any of the modes that create item records. The abbreviated codes below are to be used for data entry in the MARC Item Type field, which corresponds to the 049 $l <the letter EL, not the number 1>. These codes are case sensitive, so be careful to enter them as listed below in the bulk import rule's Mapping table.

   ⊕ When adding a new item types in the future, please try using one of these following item type codes.

MARC Item Type	Voyager Item Type Name	MARC Item Type	Voyager Item Type Name	MARC Item Type	Voyager Item Type Name
bk1	Book1	mic1	Micro1	res7	Reserve7
bk2	Book2	mic2	Micro2	res8	Reserve8
bk3	Book3	mic3	Micro3	resn	ReserveN
bkn	BookN	micn	MicroN	rea1	Realia1
bkre	BookRE	micre	MicroRE	rea2	Realia2
bklr	BookLR	miclr	MicroLR	rea3	Realia3
ser1	Serial1	sco1	Score1	rean	RealiaN
ser2	Serial2	sco2	Score2	reare	RealiaRE
ser3	Serial3	sco3	Score3	realr	RealiaLR
sern	SerialN	scon	ScoreN	arc1	Archive1
serre	SerialRE	score	ScoreRE	arc2	Archive2
serlr	SerialLR	scolr	ScoreLR	arc3	Archive3
av1	AV1	map1	Map1	arcn	ArchiveN
av2	AV2	map2	Map2	arcre	ArchiveRE
av3	AV3	map3	Map3	arclr	ArchiveLR
avn	AVN	mapn	MapN	ele1	Electrnic1
avre	AVRE	mapre	MapRE	ele2	Electrnic2
avlr	AVLR	maplr	MapLR	oth1	Other1
rec1	Recording1	sof1	Software1	oth2	Other2
rec2	Recording2	sof2	Software2	oth3	Other3
rec3	Recording3	sof3	Software3	othn	OtherN
recn	RecordingN	sofn	SoftwareN	othre	OtherRE
recre	RecordngRE	sofre	SoftwareRE	othlr	OtherLR
reclr	RecordngLR	soflr	SoftwareLR	err	Error
vid1	Video1	res1	Reserve1		
vid2	Video2	res2	Reserve2		
vid3	Video3	res3	Reserve3		
vidn	VideoN	res4	Reserve4		
vidre	VideoRE	res5	Reserve5		
vidlr	VideoLR	res6	Reserve6		

Legend:

⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 35

Part 7: Acquisitions Reference pages S.A. 7.2, pages 2-1 through 2-68

1. **Adjust Reasons**

   ➡ There are no consortial requirements for the Adjust Reasons section of SysAdmin.

2. **Claim Types**

   ➡ There are no consortial requirements for the Claim Types section of SysAdmin.

3. **Fiscal Periods**

   ➡ There are no consortial requirements for the Fiscal periods section of SysAdmin.

4. **Fund Types**

   ☑ The CARLI Office recommends adding the following fund types (you will have others):

Deposit	One Time
Gift	Restricted
Grant	Special
Regular	

   ☑ A separate document, "Planning the Ledger and Fund Structure for Voyager" contains recommendations for the design, creation, and use of ledgers and funds.

5. **Mark Reasons**

   ➡ There are no consortial requirements for the Mark Reasons section of SysAdmin.

   ➡ System-supplied codes may not be deleted. Libraries may choose to add more if these are not sufficient. However, library-defined Mark Reasons will not be understood by Voyager for reporting purposes.

6. **PO Types**

   ➡ There are no consortial requirements for the PO Types section of SysAdmin.

   ➡ Additional PO Types may be added as needed by a library. However, library-defined PO Types will not be available for inclusion in rollover rules.
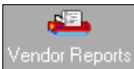
7. **Policy Definitions**

   ⊕ HAPPENING Locations should be named with all capital letters to help distinguish them from Storage Locations.
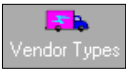
   ☑ For every HAPPENING Location, add addresses appropriate for notices such as overdue notices, purchase orders, claims, etc. An address on a HAPPENING Location will override the System Default Address on reports and notices.

8. **Vendor Reports**

   ➡ There are no consortial requirements for the Vendor Reports section of SysAdmin.

9. **Vendor Types**

   ➡ Vendor type codes and names need to be entered first, before defining Acquisitions policy groups.

   ☑ The CARLI Office recommends adding the following Vendor Types:

   Vendor Type Code - Vendor type Name

PB – Publisher	BK – Bookstore
VN – Vendor	SC – Society
AG – Agent	OT – Other

Legend:
⊕ Consortial Rule for setting value(s)   ⊘ Does not apply; Or, Do not change this value   CARLI Office, rev 6/13/2013
☑ CARLI Recommendation for setting value(s)   ➡ FYI, explanation   page 36