Universal Borrowing Checklist:
System Administration Configuration

Preface

This document provides an overview of the material covered by the I-Share Voyager System Administration workshop that is specific to Universal Borrowing. Please review this material and use it as a checklist to ensure that your library's database will be "ready" for Universal Borrowing.

Ex Libris and CARLI central staff will do most Universal Borrowing (UB) configuration as a part of the UB Integration process. However, Voyager System Administration includes some UB-related options that need to be determined and set by your library.

In order to make Universal Borrowing (UB) work predictably throughout I-Share libraries, the UB configuration for each member library needs to be consistent.

Sections:

I. PARAMETERS THAT WILL BE SET UP BY LIBRARIES AND VERIFIED BY CARLI STAFF

   A. Circulation / Miscellaneous

   B. Circulation / UB Policy Definitions

   C. Circulation / Policy Definitions and Matrix Definitions
       (For screen shots see the I-Share document "Voyager System Administration for Circulation/Universal Borrowing)

   D. OPAC Configuration / Miscellaneous

   E. Call Slips No-Fill Reasons / Rules / Queues
       (For screen shots see the I-Share document "Voyager System Administration: Call Slips")

II. PARAMETERS THAT WILL BE SET UP BY EX LIBRIS AND CARLI STAFF

   A. Circulation / UB Patron Groups

   B. Search / Database Definitions

   C. OPAC Configuration / Request Forms (for UB requests in the UC)

I. PARAMETERS THAT WIL BE SET UP BY LIBRARIES AND VERFIED BY CARLI STAFF

A. Circulation / UB Policy Definitions

Verify that the "UB Eligible" option is checked for all local patron groups, as appropriate. The other values, will be populated in all I-Share databases during UB Integration.

B. Circulation / Policy Definitions and Matrix Definitions

These settings are determined by local policy decisions. Verify the following for Universal Borrowing:
—Rules for UB patron groups [patron tab]
—Matrix entries for UB patron group/item type combinations

C. OPAC Configuration / Miscellaneous
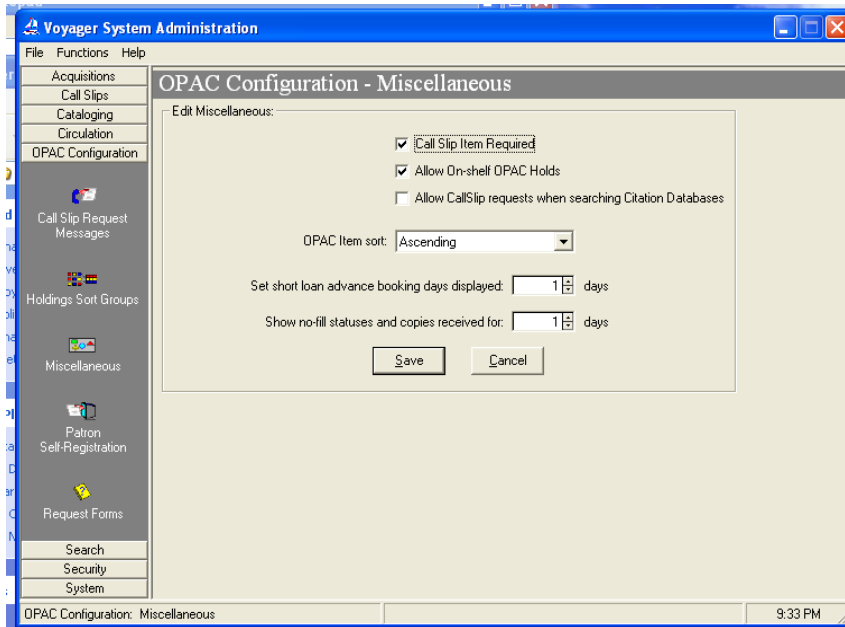
1. Verify the "**Call Slip Item Required**" setting. Having it checked or unchecked is a local decision. See the document "Call Slip Item Required" at: http://www.carli.illinois.edu/mem-prod/I-Share/circ/cs-itemreq.html

2. "**Allow On-shelf OPAC Holds** " should be checked by the library if the library allows any of the local Patron Groups to request local items through the local OPAC (as opposed to requesting via the I-Share union catalog).

D. Call Slips No-Fill Reasons/Rules/Queues

Verify that call slip is set up. (For screen shots, see the I-Share document "Voyager System Administration: Call Slips")

II. PARAMETERS THAT WILL BE CONFIGURED BY EX LIBRIS AND CARLI STAFF AS PART OF UB INTEGRATION (not all screen shots included)

    A. Circulation / Patron Groups
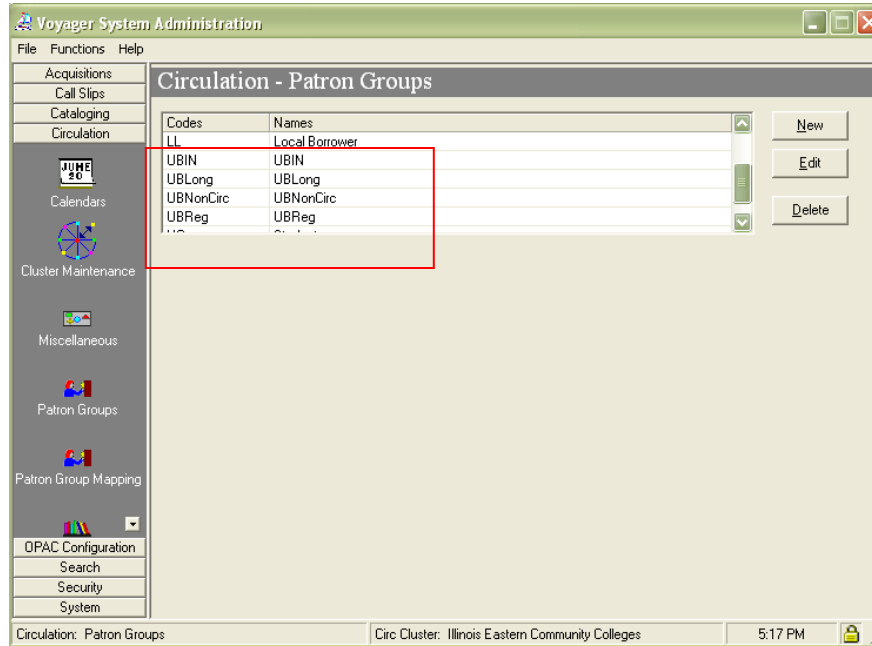
        1. Verify all four UB Patron Groups have been created:
           UBIN
           UBLong
           UBReg
           UBNonCirc

    B. Search / Database Definitions
        1. Each database will be "UB-Enabled". This will allow libraries to configure their UB Policy definitions in System Administration/Circulation.
        2. Each database will be configured to connect to every other I-Share database.
        3. Each database will have UB options configured for each home database (i.e. Weight and Maximum Hits)
        4. Each database will have its patron groups mapped to appropriate UB patron groups in every other I-Share database.

    C. OPAC
        1. Library locations will be enabled in OPAC pull-down menus. This will allow your patrons to place requests in the Universal Catalog.
        2. Option for the UB Request form in the I-Share union catalog will be exposed: "Request 1st available copy."