Voyager® 9.1
Media System Administration
User's Guide

November 2014

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About This Document

Purpose

This document provides instructions for configuring the Media System Administration client.

Intended Audience

This document is intended for Voyager customers who have purchased Media Scheduling.

Reason for Reissue

This user's guide is being reissued for the following reasons.

- Updated Login Information on page 1-3 with the new Login Information enhancements

How to Use This Document

This document consists of the following:

Chapter 1   "Getting Started
                   Chapter 1 provides an overview of using the Media System
                   Administration client.

Chapter 2   Using Media System Administration
                   Chapter 2 describes the settings available in Media System
                   Administration. This includes creating operators, media types,
                   room types, equipment types, equipment group types, system
                   policies and so on.

Appendix A   Security Profiles and Policy Groups
                   Appendix A describes the settings available in Media System
                   Administration. This includes creating operators, media types,
                   room types, equipment types, equipment group types, system
                   policies and so on.

Index   The Index is an alphabetical, detailed cross-reference of topics.

Conventions Used in This Document

The following conventions are used throughout this document:

- Names of commands, variables, stanzas, files, and paths (such as
  `/dev/tmp`), as well as selectors and typed user input, are displayed in
  `constant width` type.

- Commands or other keyboard input that must be typed exactly as
  presented are displayed in **`constant width bold`** type.

- Commands or other keyboard input that must be supplied by the user are
  displayed in ***`constant width bold italic`*** type.

- System-generated responses such as error messages are displayed in
  `constant width` type.

- Variable *portions* of system-generated responses are displayed in
  `constant width italic` type.

- Keyboard commands (such as **Ctrl** and **Enter**) are displayed in **bold**.

- Required keyboard input such as "Enter **`vi`**" is displayed in **`constant
  width bold`** type.

- Place holders for variable portions of user-defined input such as **`ls -l`**
  `filename` are displayed in ***`italicized constant width bold`*** type.

- The names of menus or status display pages and required selections from menus or status display pages such as "From the **Applications** drop-down menu, select **System-wide**," are displayed in **bold** type.

- Object names on a window's interface, such as the **Description** field, the **OK** button, and the **Metadata** tab, are displayed in **bold** type.

- The titles of documents such as *ENCompass Web Client User's Guide* are displayed in *italic* type.

- Caution, and important notices are displayed with a distinctive label such as the following:

NOTE:
Extra information pertinent to the topic.

IMPORTANT:
Information you should consider before making a decision or configuration.

CAUTION:
Information you must consider before making a decision, due to potential loss of data or system malfunction involved.

TIP:
Helpful hints you might want to consider before making a decision.

RECOMMENDED:
Preferred course of action.

OPTIONAL:
Indicates course of action which is not required, but may be taken to suit your library's preferences or requirements.

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Getting Started

1

Introduction

This chapter describes the prerequisite installation and configuration information necessary for beginning work in the Media System Administration module.

For more information about using the Voyager Media Scheduling module, see the *Voyager Media Scheduling User's Guide.*

Purpose of this Chapter

This purpose of this chapter is as follows.

- To provide instructions for opening and closing the Media System Administration module.

- To provide instructions for logging in and out of the Media System Administration module.

- To provide general instructions for using Help in the Media System Administration.

- To identify prerequisites for working with the Voyager Media System Administration module.

Prerequisite Skills and Knowledge

To use this document effectively, you need knowledge of the following:

- Basic Microsoft® Interface navigation
- Basic Voyager System Administration module
- Basic Voyager Media Scheduling module

Before You Begin

Before you begin, you must have the Media System Administration client installed.

Logging In

The procedure for logging in is shown in .

Procedure 1-1. Logging In

Use the following to log in to Voyager Media System Administration.

1. Double-click the **Media System Administration** icon on your desktop from the **Start** menu.

   Result: The Login dialog box displays. See Figure 1-1.
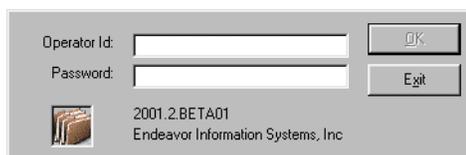
Figure 1-1.   Media System Administration Login Dialog Box

2. Enter your ID and Password.

3. Click the **OK** button.

Result: The Media System Administration workspace displays.

Once you successfully log in to the Media System Administration module, you can begin to configure your policies and enter the information needed to control Media Scheduling activities.

Help

You can get help about Media System Administration by pressing **F1**. For more detailed information, the following items are available on the **Help** menu.

Field Name	Description
Help Topics	Displays the table of contents for Media System Administration Help and opens the Help Window.
Endeavor on the Web	Connects to Endeavor Support Web or to Endeavor's home page.
About System Administration	Displays the copyright notice and version number for Media System Administration.

Login Information

You can access the following login information by clicking **File > Login Information**:

- Operator name
- Operator ID
- Location
- Encryption (enabled/disabled)
- Server (as defined in the Server= parameter in the voyager.ini file)
- Database
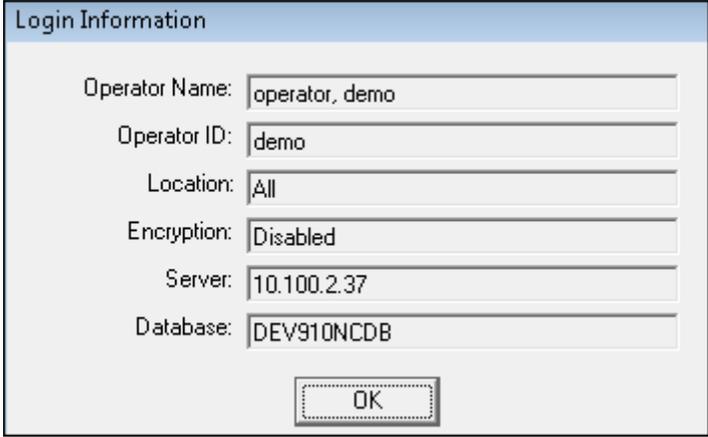
Figure 1-2. **Media System Administration Login Information Dialog Box**

Exiting Media System Administration

To close Voyager Media System Administration, select **File>Exit** from the main menu.

Using Media System Administration

2

Introduction

The Voyager Media System Administration module offers a wide variety of options for configuring Voyager Media Scheduling to reflect your library's situation and policies. You should decide with your colleagues what options fit your circumstances and what policies you want to encode into the system. This allows you to configure Voyager Media Scheduling so that you can take full advantage of its power and flexibility.

No matter what kind of system you are coming from or whether you have previously used a paper system to track your media scheduling activities, your implementation can be as simple or as complex as your library policies. As you and your colleagues begin discussions about the various decisions you must make, this may be an excellent opportunity to rethink some policies and procedures to reduce complexity and thereby streamline your workflows. A paper-based media scheduling process, for example, involves certain activities that are not required by a computerized system and may be eliminated from your current procedures.

You can also make changes to Voyager Media System Administration once you learn more about the system and have some first-hand experience with using the Voyager Media Scheduling module.

Operator Security

The **Operator Security** list bar button (Figure 2-3) provides access to options that determine what permissions Voyager users have within Media Scheduling.

Operator Security

Figure 2-3.   Operator Security Tab

You can control the following separate aspects of security.

- The information that is accessible.

- The people that can access it.

- What locations can be accessed.

Each operator who uses Voyager Media Scheduling must have an Operator Profile containing a name, Operator ID, and Password. Before using staff-side Voyager Media Scheduling, operators must login by typing in their Operator ID and Password. The link between an Operator Profile and a Security Profile lets the system know what functions the operator can and cannot perform in the Voyager Media Scheduling module.

Entering Information

When operators log in to the Voyager Media Scheduling module, they must type in their Operator IDs and Passwords exactly as they are entered here, including upper and lower case alpha characters, or their sign-on attempt is rejected. For example, if you enter "mEdia" as an Operator ID and Password the system rejects "media" or "Media" or any other variant typed at login. The system accepts only "mEdia."

Security Profiles

The settings in the Security Profile (Figure 2-6) determine, for anyone who is a part of that Security Profile, what types of activities can and cannot be performed.

See Security Profiles and Policy Groups on page A-1 for a description of the relationship between Security Profiles definitions and Policy Groups definitions as it relates to operator authorizations for **Bookings** and **Inventory**.
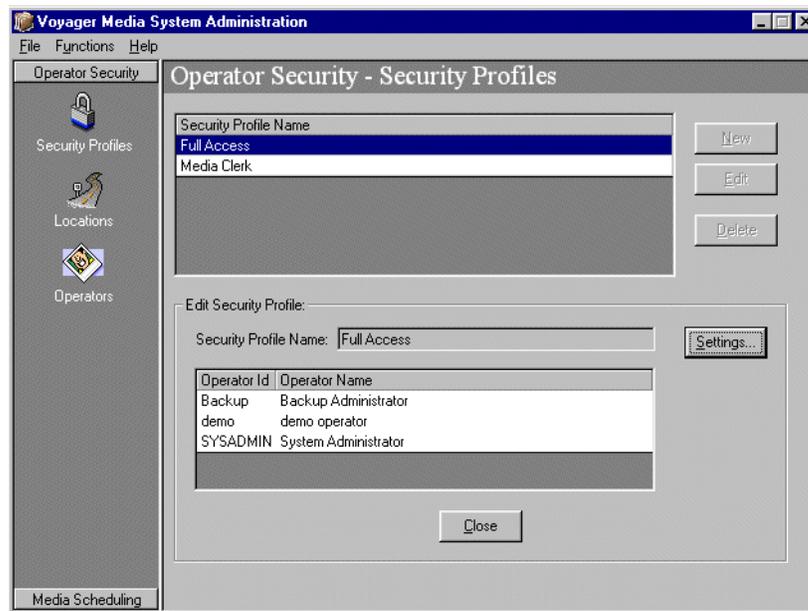
Figure 2-4.   Operator Security-Security Profiles

The procedure for creating a new Security Profile Name is shown in Procedure 2-2, Creating a New Security Profile Name, on page 2-3.

Procedure 2-2. Creating a New Security Profile Name

Use the following to create a new Security Profile Name.

1.   Click the **Security Profiles** button (Figure 2-5) located on the Operator Security tab.

Figure 2-5.   Security Profiles Button

2.   Click the **New** button.

Result: The **Security Profiles Settings** dialog box displays.

Security Profile Settings

The **Security Profiles Settings** dialog box (Figure 2-6) is where you name and create a security profile that can be used in the Voyager Media Scheduling module.
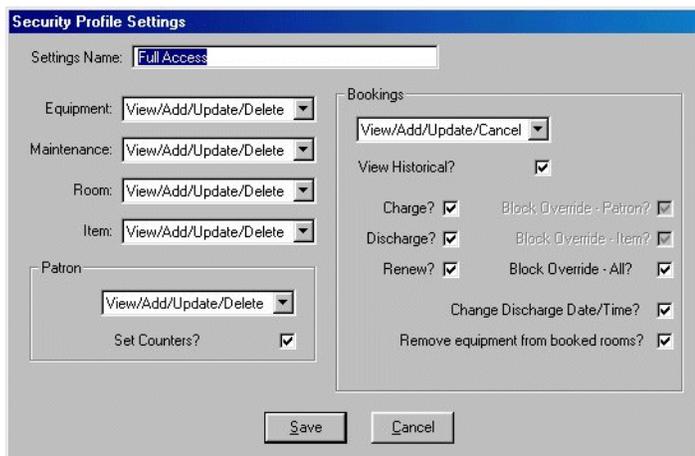
Figure 2-6.   Security Profile Settings Dialog Box

Operator Security Profile Settings

The **Security Profile Settings** dialog box allows you to configure the security settings for viewing, adding, updating and deleting the Voyager Media Scheduling equipment, equipment maintenance, room, item, patron, and booking records. The settings made in this dialog box are applied to the operator security profile currently being edited.

The levels of security shown in Table 2-1 on page 2-4 can be set individually for Equipment, Equipment Maintenance, Rooms, Items, Patrons, and Bookings.

Table 2-1.   Security Levels

Security Option	Description
No Access	Staff cannot view, add, update or delete records of that type

Table 2-1.   Security Levels

Security Option	Description
View	Staff can view records but cannot add, update or delete records of that type
View/Add/Update	Staff can view, add and update but not delete records of that type
View/Add/Update/ Delete	Staff can view, add, update and delete records of that type

Field Name	Description
Equipment	Select the desired level of security for equipment records from the drop-down menu (No Access, View, View/Add/ Update, View/Add/Update/Delete).
Maintenance	Select the desired level of security for equipment maintenance records from the drop-down menu (No Access, View, View/Add/Update, View/Add/Update/Delete).
Room	Select the desired level of security for room records from the drop-down menu (No Access, View, View/Add/Update, View/Add/Update/Delete).
Item	Select the desired level of security for item records from the drop-down menu (No Access, View, View/Add/Update, View/Add/Update/Delete).Patron
Patron settings	
Patron	Select the desired level of security from the drop-down menu (No Access, View, View/Add/Update, View/Add/ Update/Delete).
Set Counters	Select this checkbox if you want the security profile to include the ability to change or reset counters.
Bookings settings	
Bookings security drop-down	Select the desired level of security from the drop-down menu (No Access, View, View/Add/Update, View/Add/ Update/Delete).

View Historical?	Select this checkbox if you want the security profile to include the ability to view booking histories.
	NOTE: In order to view historical bookings, you must also have the **Retain Patron ID for Media Booking History** box checked. This retains a link between items and patrons in the Voyager Media Scheduling module. If this checkbox is not set, historical bookings does not record which patron charged which media items. See the System Administration User's Guide for more information.
Charge?	Click this checkbox if you want the security profile to include the ability to charge media items.
Discharge?	Click this checkbox if you want the security profile to include the ability to discharge media items.
Renew?	Click this checkbox if you want the security profile to include the ability to renew media items.
Block Override-Patron?	Click this checkbox if you want your security profile to include the ability to override patron blocks.
	NOTE: If the Block Override-All? box is checked, Block Override-Patron is automatically checked.
Block Override-Item?	Click this checkbox if you want your security profile to include the ability to override item blocks.
	NOTE: If the Block Override-All? box is checked, Block Override-Item is automatically checked.
Block Override-All?	Click this checkbox if you want your security profile to include the ability to override any blocks that occur in the Voyager Media Scheduling module.
Change Discharge Date/Time?	Click this checkbox if you want the security profile to include the ability to change discharge dates and times.
Remove equipment from booked rooms?	Click this checkbox to allow operator to move equipment from booked (pending, not currently charged) rooms.

Locations

The **Operator Security - Locations** dialog box (Figure 2-7) provides options that you select to determine which groups of people by location have permissions to to execute different functions based on the settings (as saved in **Operator Security - Security Profiles**) for that group.
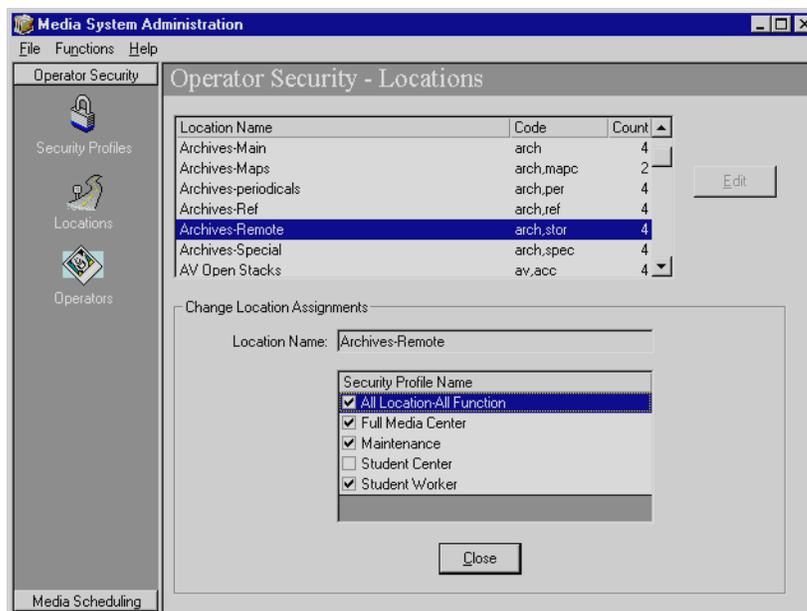
Figure 2-7.   Operator Security-Locations

The procedure for editing location assignments is shown in Procedure 2-3, Edit Location Assignments, on page 2-7.

Procedure 2-3. Edit Location Assignments

Use the following to edit location assignments.

1. Click the **Locations** icon (Figure 2-8) located on the **Operator Security** list bar.
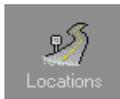
Figure 2-8. Locations Button

Result: The **Locations** workspace displays.

NOTE:
The list of location names that displays is dependent on the locations created in Voyager System Administration in **System** > **Locations**.

2. Select a location from the **Location Name** list and click **Edit**.

Result: The **Change Location Assignments** group box displays, and the name of the currently selected location is highlighted. See .
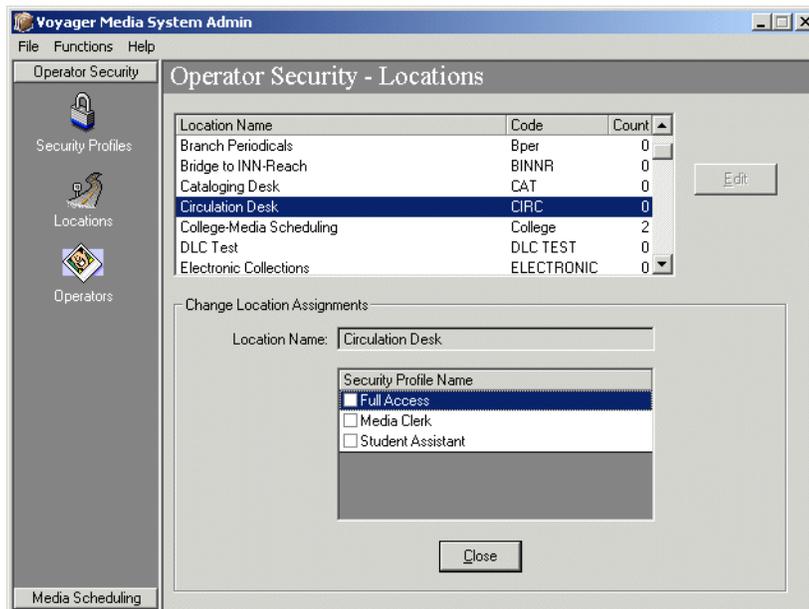
Figure 2-9. Change Location Assignments group box

3. Check every box for every profile to which you want to allow access to the selected location.

Result: This identifies the operator group permissions for each location.

NOTE:
To enable media booking requests through WebVoyáge, at least one of the operator groups must have permissions granted for the location identfied in Voyager System Administration as the default **OPAC Circ Desk**. See Figure 2-10.
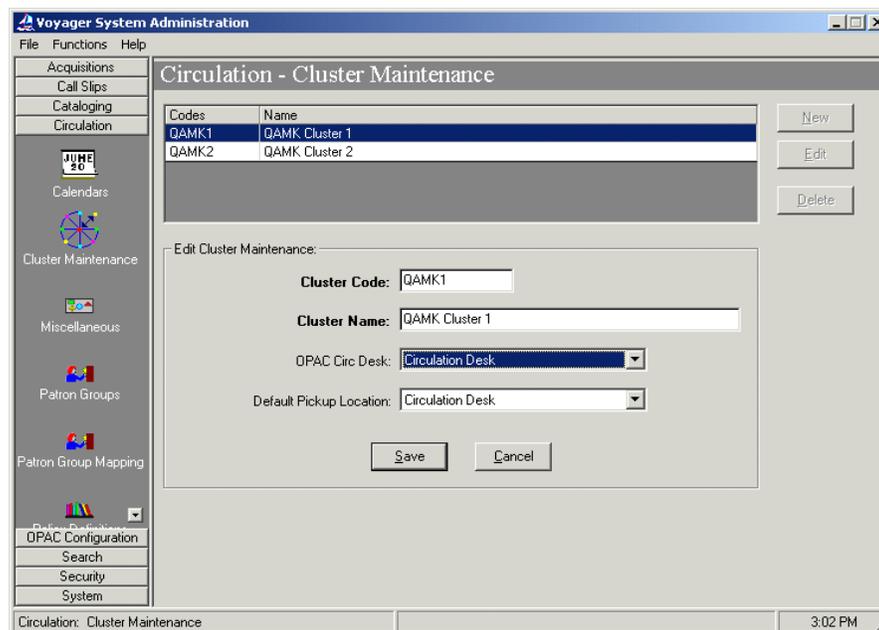
Figure 2-10.   Voyager System Administration OPAC Circ Desk example

4. Click the **Close** button when you are done making changes.

Result: This saves the option(s) that you selected

NOTE:
Any changes that you make take effect immediately. However, you may experience a lag between saving these options and the change taking effect while Voyager executes the change.

Operators

The **Operators** workspace (Figure 2-11) lets you assign a security profile to each operator. Operators can be created and deleted only through the main Voyager System Administration module. You may assign only one profile to each operator.
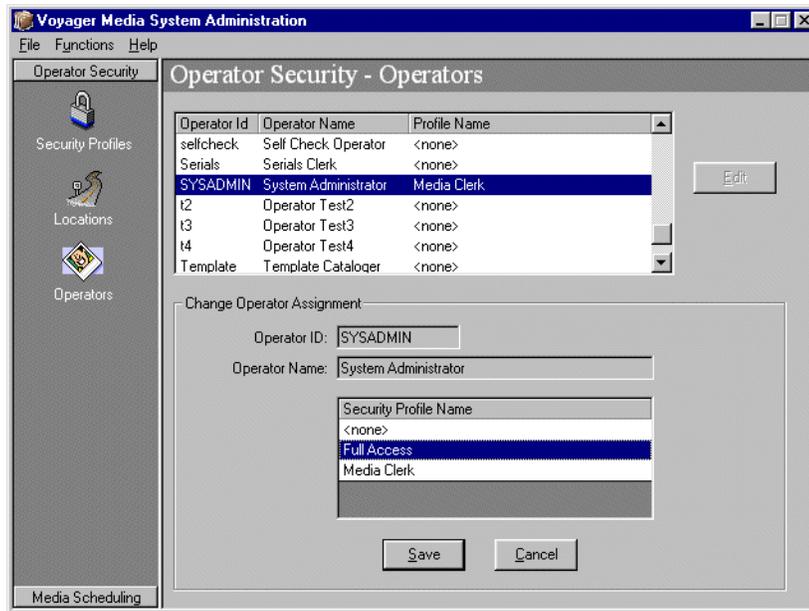
Figure 2-11.   Operator Security-Operators

The procedure for editing an Operators group is shown in Procedure 2-4, Editing an Operators Group, on page 2-10.

Procedure 2-4. Editing an Operators Group

Use the following to edit an Operator's group.

1. Click the **Operators** button (Figure 2-12) on the **Operator Security** tab.

Figure 2-12.   Operators Button

2. Select an operator from the list.

3. Click **Edit**.

    Result: The **Change Operator Assignment** dialog box displays.

4. Select a security profile from the **Security Profile Name** list.

5. Click **Save** or click **Cancel**.

    Result: This saves or discards changes.

Media Scheduling

The Media Scheduling portion of the Voyager Media System Administration module allows you to configure the information you need for using your Voyager Media Scheduling module. You can create and edit different categories or "types" of items, rooms and details that you can then use to keep your inventory in order and process bookings more swiftly. You can use these to highlight important information that might be necessary to complete a booking.

Click the **Media Scheduling** listbar () to display the icons for the tools on the taskbar.
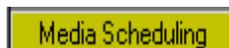
Figure 2-13.   Media Scheduling listbar

Equipment Types

The Media Scheduling-Equipment Types window (Figure 2-14) is for entering your equipment type descriptions and codes to identify the kinds of equipment you are charging in your Media Scheduling sessions and all of the different equipment that is available to the patrons. This tool also allows you to create Equipment Groups Types, so that you can also assign Equipment Groups with identical types of equipment to the same group.
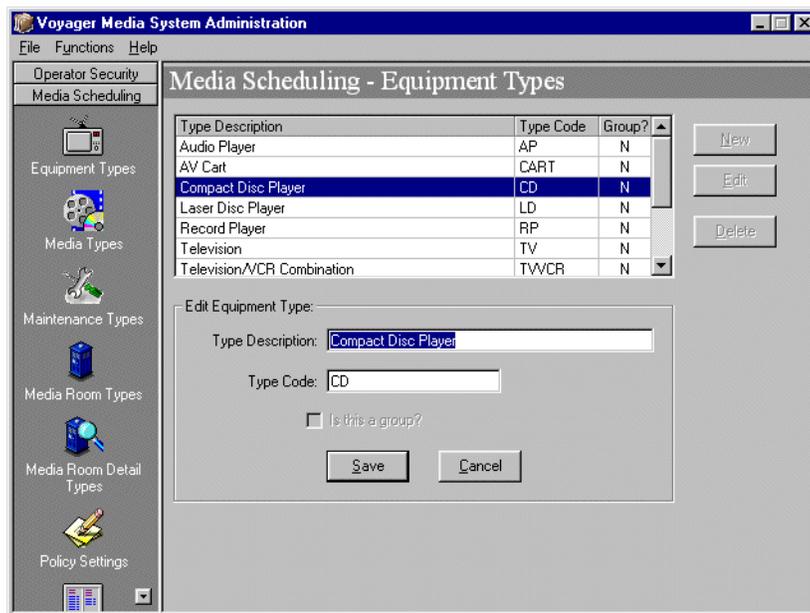
Figure 2-14.   Media Scheduling-Equipment Type Window

To access the Media Scheduling-Equipment Type window, click the **Equipment Types** button (Figure 2-15).

Figure 2-15.   Equipment Types Button

Creating a New Equipment Type

The procedure for creating a new equipment type is shown in Figure 2-5.

Procedure 2-5. Creating a New Equipment Type

Use the following to create an Equipment Type.

1. Click the **New** button.

    Result: The **New Equipment Type** portion of the window displays (Figure 2-16).
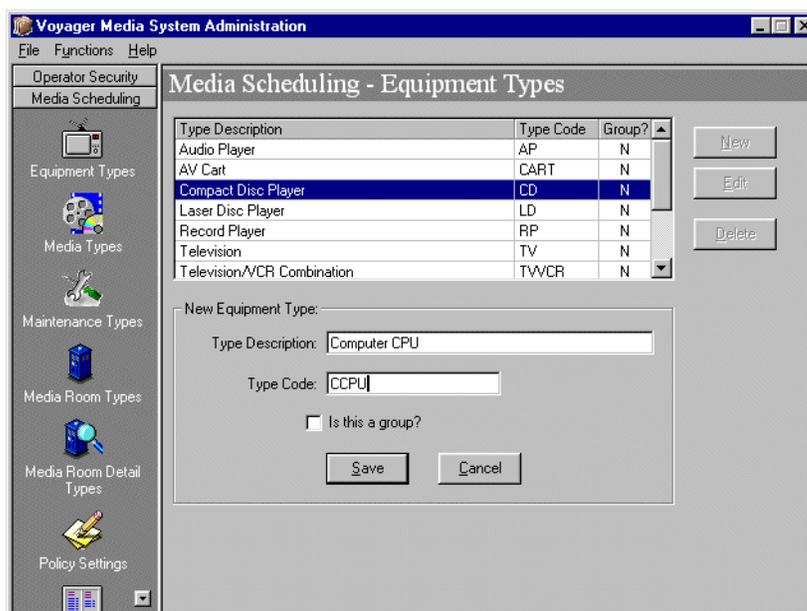
Figure 2-16.   Media Scheduling-Equipment Types (New)

2. Enter the media type description in the **Type Description** field.

3. Enter the code for the media type in the **Type Code** field.

4. Click the "**Is this a group**" checkbox if the type is going to refer to an equipment group.

If the type is to refer to a kind of equipment, do not select the check box.

5. Click **Save** to save your changes to the database, or click **Cancel** to exit without saving.

Editing an Equipment Type

The procedure for editing an equipment type is shown in Procedure 2-6, Editing an Equipment Type, on page 2-14.

Procedure 2-6. Editing an Equipment Type

Use the following to edit an Equipment Type.

1. Click an **Equipment Type Description** to highlight it.

2. Click the **Edit** button.

   Result: The Edit Equipment Type portion of the window displays.

3. Place your cursor in the **Type Description** field and re-type any information that you want to change.

4. Place your cursor in the **Type Code** field and re-type any information that you want to change.

   NOTE:
   When editing an equipment type, the group or item condition cannot be changed.

5. Click **Save** to save your changes to the database; click **Cancel** to exit without saving.

Deleting an Equipment Type

The procedure for deleting an Equipment Type is shown in Procedure 2-7, Deleting an Equipment Type, on page 2-15.

Procedure 2-7. Deleting an Equipment Type

Use the following to delete an Equipment Type.

1. Click a **Type Description** to highlight it.

2. Click the **Delete** button.

   Result: The Delete Equipment Type dialog box displays.

3. Click **Yes** to delete the Equipment Type; click **No** to retain the Equipment Type.

Media Types

The Media Types workspace (Figure 2-17) is for entering descriptions about the media types that your patrons use and to assign a unique code to each Media Type.
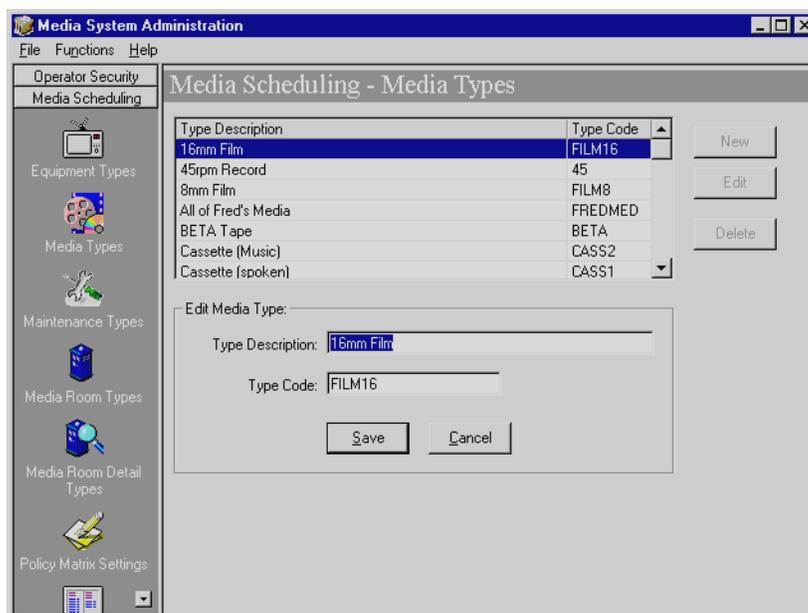
Figure 2-17.   Media Scheduling-Media Types

To access the Media Scheduling-Media Types window, click the **Media Types** button (Figure 2-18).

Figure 2-18.   Media Types Button

Creating a New Media Type

The procedure for creating a new Media Type is shown in Procedure 2-8, Creating a New Media Type, on page 2-16.

Procedure 2-8.   Creating a New Media Type

Use the following to enter a media type.

1. Click the **New** button.

    Result: The **New Media Type** fields display.

2. Enter the name for the type of media that you are creating in the **Type Description** field.

3. Enter the code for the type of media that you are creating in the **Type Code** field.

4. Click the **Save** button to save your information to the database; click **Cancel** to exit without saving.

Editing a Media Type

The procedure for editing a Media Type is shown in Procedure 2-9, Editing a Media Type, on page 2-17.

Procedure 2-9. Editing a Media Type

Use the following to edit a Media Type.

1. Click a **Type Description** to highlight it.

2. Click the **Edit** button.

   Result: The **Edit Media Type** workspace displays.

3. Place your cursor in the **Type Description** field and re-type any information that you want to change.

4. Place your cursor in the **Type Code** field and re-type any information that you want to change.

5. Click **Save** to save your changes to the database, click **Cancel** to exit without saving.

Deleting a Media Type

The procedure for deleting a Media Type is shown in .

Procedure 2-10. Deleting a Media Type

Use the following to delete a Media Type.

1. Click a **Media Type Description** to highlight it.

2. Click the **Delete** button.

   Result: The Delete Media Type dialog box displays.

3. Click **Yes** to delete the Media Type; click **No** to retain the Media Type.

Maintenance Types

The Media Scheduling Maintenance Types activity ([Figure 2-19](#)) allows you to enter all of the kinds of maintenance you perform on your Media Scheduling items and everything that is associated with those items such as rooms and storage areas.
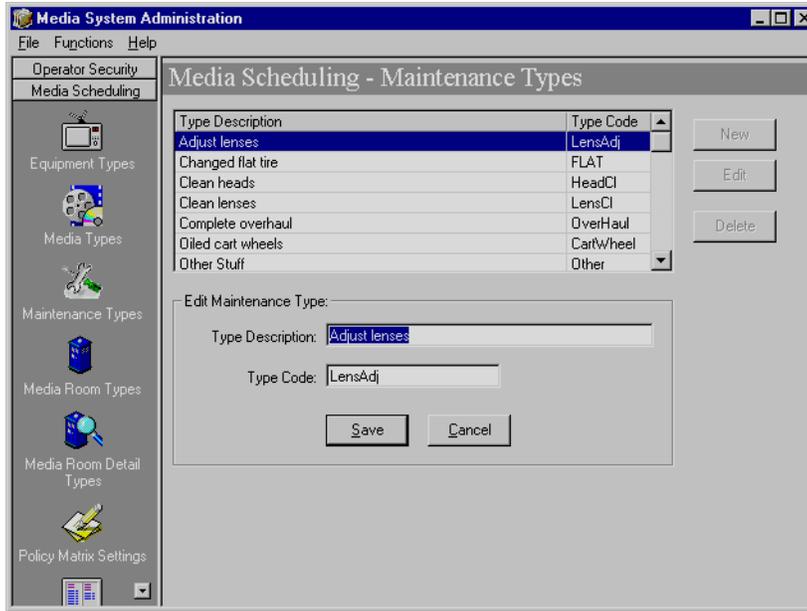

Figure 2-19.   Media Scheduling-Maintenance Types Window

To access the Media Scheduling-Maintenance Types window, click the **Maintenance Types** button ([Figure 2-20](#)).

Figure 2-20.   Maintenance Types Button

Creating a New Maintenance Type

The procedure for creating a new Maintenance Type is shown in Procedure 2-11, Creating a New Maintenance Type, on page 2-19.

Procedure 2-11. Creating a New Maintenance Type

Use the following to enter a media type.

1. Click the **New** button.

   Result: The New Maintenance Type fields display.

2. Enter the name for the type of maintenance that you are creating in the **Type Description** field.

3. Enter the code for the maintenance type that you are creating in the **Type Code** field.

4. Click the **Save** button to save your information to the database; click **Cancel** to exit without saving.

Editing a Maintenance Type

The procedure for editing a Maintenance Type is shown in Procedure 2-12, Editing a Maintenance Type, on page 2-19.

Procedure 2-12. Editing a Maintenance Type

Use the following to edit a Maintenance Type.

1. Click a **Type Description** to highlight it.

2. Click the **Edit** button.

   Result: The Edit Maintenance Type portion of the window displays.

3. Place your cursor in the **Type Description** field and re-type any information that you want to change.

4. Place your cursor in the **Type Code** field and re-type any information that you want to change.

5. Click **Save** to save your changes to the database; click **Cancel** to exit without saving.

Deleting a Maintenance Type

The procedure for deleting a Maintenance Type is shown in Procedure 2-13, Deleting a Maintenance Type, on page 2-20.

Procedure 2-13. Deleting a Maintenance Type

Use the following to delete a Maintenance Type.

1. Click a **Maintenance Type Description** to highlight it.

2. Click the **Delete** button.

    Result: The Delete Maintenance Type dialog box displays.

3. Click **Yes** to delete the Maintenance Type; click **No** to retain the Maintenance Type.

Media Room Types

The Media Scheduling Media Room Types activity (Figure 2-21) allows you to enter all of the types of rooms you have in your media center and university that you want to make available as a possible viewing location or pick-up location.
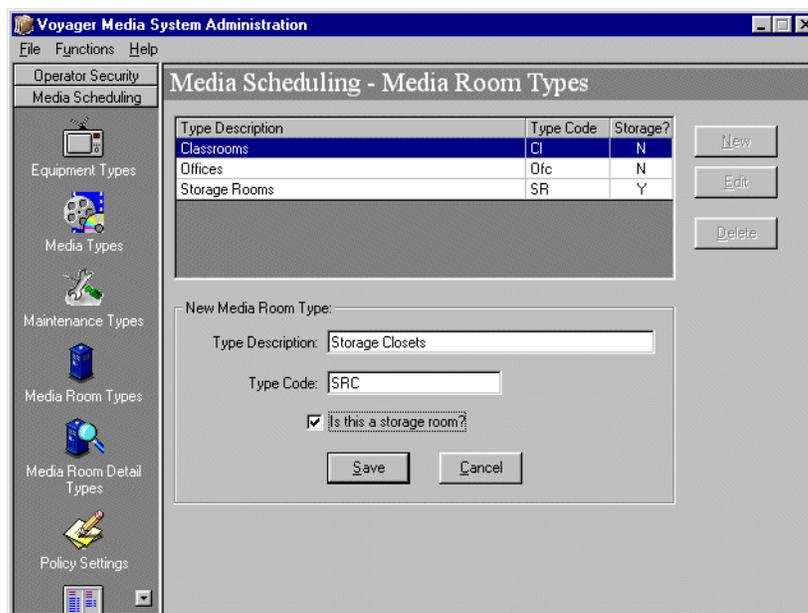
Figure 2-21.   Media Scheduling-Media Room Types

To access the Media Scheduling-Media Room Types dialog box, click the **Media Room Types** button (Figure 2-22).

Figure 2-22.   Media Room Types Button

Creating a Media Room Type

The procedure for creating a Media Room Type is shown in Procedure 2-14, Creating a Media Room Type, on page 2-21.

Procedure 2-14. Creating a Media Room Type

Use the following to enter a media room type.

1. Click the **New** button.

    Result: The **New Media Room Type** fields display.

2. Enter the name for the media room type that you are creating in the **Type Description** field.

3. Enter the code for the media room type that you are creating in the **Type Code** field.

4. Click the checkbox "**Is this a storage room**" only if you are going to use the room solely as a storage room.

    NOTE:
    Checking this box prevents this room from being able to be booked. Once set, this checkbox cannot be changed. Do not check this box if you want to be able to use the room for anything other than storage.

5. Click the **Save** button to save your information to the database; click **Cancel** to exit without saving.

Editing a Media Room Type

The procedure for editing a Media Room Type is shown in Procedure 2-15, Editing a Media Room Type, on page 2-22.

Procedure 2-15. Editing a Media Room Type

Use the following to edit a Media Room Type.

1. Click a **Type Description** to highlight it.

2. Click the **Edit** button.

    Result: The Edit Media Room Type portion of the window displays.

3. Type a new description into the **Type Description** field, or type a new code into the **Type Code** field. The **Is this a storage room** checkbox cannot be changed. To change it, you must delete this room type and create a new one.

4. Click **Save** to save your changes to the database; click **Cancel** to exit without saving.

Deleting a Media Room Type

The procedure for deleting a Media Room Type is shown in .

Procedure 2-16. Deleting a Media Room Type

Use the following to delete a Media Room Type.

1. Click a **Media Room Type Description** to highlight it.

2. Click the **Delete** button.

   Result: The Delete Media Room Type dialog box displays.

3. Click **Yes** to delete the Media Room Type; click **No** to retain the Media Room Type.

Media Room Detail Types

The Media Scheduling Media Room Detail Types activity (Figure 2-23) allows you to enter all of the main features of the rooms in your media center and university that you might need to know in order to decide on a possible booking location.
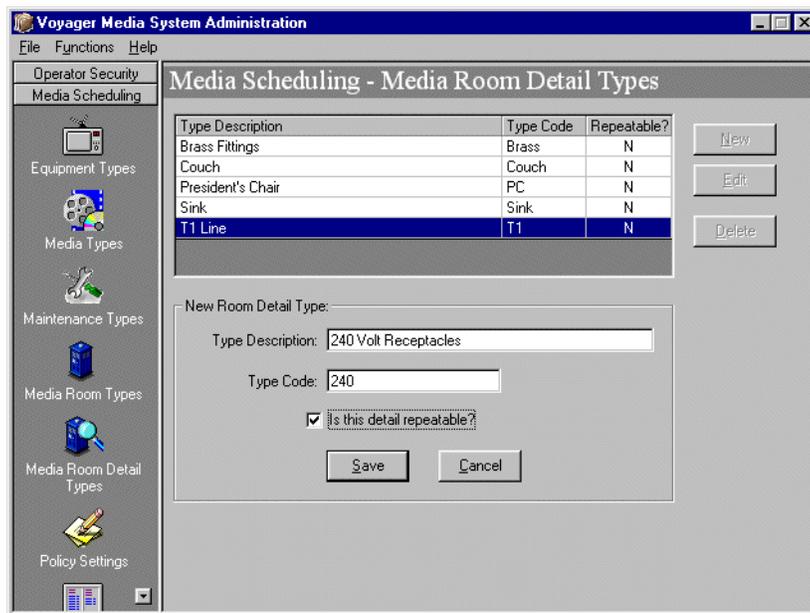
Figure 2-23.   Media Scheduling-Media Room Detail Types

To access the Media Scheduling-Media Room Types window, click the **Media Room Types** button (Figure 2-24).

Figure 2-24.   Media Room Types button

Creating a Media Room Detail Type

The procedure for creating a Media Room Detail Type is shown in Procedure 2-17, Creating a Media Room Detail Type, on page 2-24.

Procedure 2-17. Creating a Media Room Detail Type

Use the following to create a new Media Room Detail Type.

1. Click **New**.

   Result: The **New Room Detail Type** box displays.

2. Type a name for the new type into the **Type Description** box.

3. Type a code for the type into the **Type Code box**.

4. If this is to be a repeatable detail (i.e., if it can be added to a room description more than once), check the "**Is this detail repeatable?**" box.

5. Click **Save** to keep your changes and close the box; click **Cancel** to discard them.

Editing a Media Room Detail Type

The procedure for editing a Media Room Detail Type is shown in Procedure 2-18, Editing a Media Room Detail Type, on page 2-25.

Procedure 2-18. Editing a Media Room Detail Type

Use the following to edit an existing Media Room Detail Type.

1. Select the profile you want to edit.

2. Click **Edit**.

   Result: The **Edit Media Room Detail Type** box displays.

3. Type a new name for the type into the **Type Description** box, or type a new code for the type into the **Type Code** box. You cannot change the **Repeatable**? status.

4. Click **Save** to keep your changes and close the box; click **Cancel** to discard them.

Deleting a Media Room Detail Type

The procedure for deleting a Media Room Detail Type is shown in Procedure 2-19, Deleting a Media Room Detail Type, on page 2-26.

Procedure 2-19. Deleting a Media Room Detail Type

Use the following to delete an existing Media Room Detail Type.

1. Select the type you want to delete.

2. Click the **Delete** button.

   Result: The Delete Room Detail Type dialog box displays.

3. Click **Yes** to delete the Media Room Detail Type; click **No** to retain the Media Room Detail Type.

Policy Settings

The Media Scheduling-Policy Settings activity allows you to configure matrix settings for rooms, equipment and items. The Policy Settings (Figure 2-25) allow you to configure things such as whether you can book an item or piece of equipment, what your interval rates are, and so on.
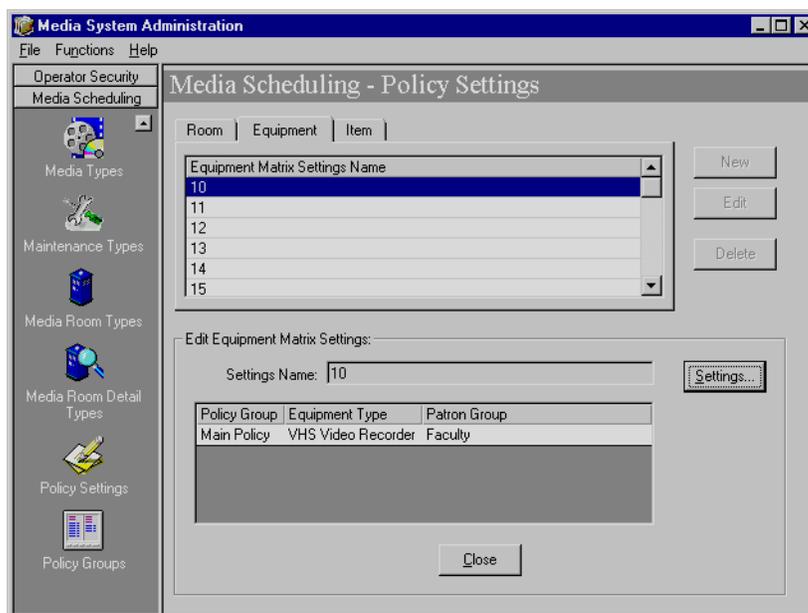
Figure 2-25.   Media Scheduling-Policy Settings Window

To access the Media Scheduling-Policy Settings window click the **Policy Settings** button (Figure 2-26).

Figure 2-26.   Policy Settings Button

Room Matrix Settings

The Room Matrix Settings allows you to create and edit a matrix for Media Scheduling Rooms.

Creating a New Room Matrix

The procedure for creating a new Room Matrix is shown in .

Procedure 2-20. Creating a New Room Matrix

Use the following to create a new room matrix.

1. Click the **Room Tab** and click the **New** button

   Result: This displays the Room Matrix Settings dialog box (Figure 2-27).

Figure 2-27.   Room Matrix Settings dialog box

2. Enter the **Settings Name** in the field.

3. Check the **Can book?** check box if the matrix allows you to book a room.

4. Select a value and a description from the two drop down menus in the **Maximum booking time** field.

5. Click **Save** to save your changes to the database; click **Cancel** to exit without saving.

Editing a Room Matrix Setting

The procedure for editing a Room Matrix Setting is shown in Procedure 2-21, Editing a Room Matrix Setting, on page 2-28.

Procedure 2-21. Editing a Room Matrix Setting

Use the following to edit Room Matrix settings.

1. Click the **Room** tab. Click the **Edit** button, then click the **Setting** button.

2. Place your cursor in any of the field(s) that you want to edit and re-type the information. See the section above for details on the information you can edit.

3. Click **Save** to save your changes to the database; click **Cancel** to exit without saving.

Deleting a Room Matrix Setting

The procedure for deleting a Room Matrix Setting is shown in Procedure 2-22, Deleting a Room Matrix, on page 2-29.

Procedure 2-22. Deleting a Room Matrix

Use the following to delete a Room Matrix.

1. Highlight a **Room Matrix** by clicking it.

2. Click the **Delete** button. The Delete Room Matrix Setting dialog box displays.

3. Click **Yes** to delete the Matrix; click **No** to retain the Matrix.

Equipment Matrix Settings

The Equipment Matrix Settings dialog box (Figure 2-28) allows you to configure an equipment matrix to be used for a policy group. Included is configurable information such as booking settings and fine settings.
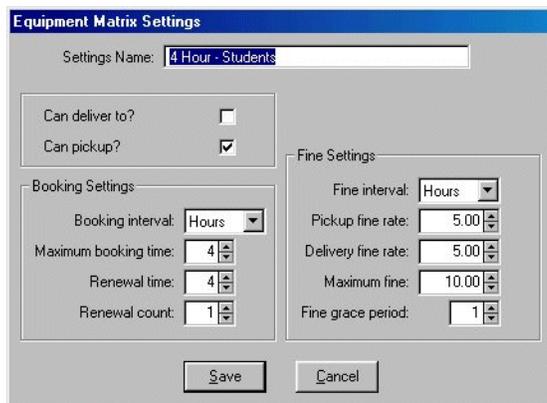
Figure 2-28.   Equipment Matrix Settings dialog box

Creating a New Equipment Matrix

The procedure for creating a new Equipment Matrix is shown in Procedure 2-23, Creating a New Equipment Matrix, on page 2-30.

Procedure 2-23. Creating a New Equipment Matrix

Use the following to create a new equipment matrix.

1. Click the **Equipment** tab and click the **New** button.

   Result: The Equipment Matrix Settings dialog box displays.

2. Enter an equipment settings name in the **Settings Name** field.

3. Click the **Can deliver to?** checkbox if you want the equipment matrix to include delivery.

4. Click the **Can pickup?** checkbox if you want the equipment matrix to include pickup.

5. In the **Booking Settings** section, click the **Booking interval** field and click the down arrow to display the description choices for the matrix booking interval. Select a choice.

6. Click the **Maximum booking time** field and select a value that corresponds to the description that you set in the Booking interval field. This field allows you to set the maximum amount of time for which equipment can be booked.

7. Click the **Renewal time** field and select a value that corresponds to the description that you set in the Booking Interval field. This field allows you to set a policy for the amount of time for which the equipment can be renewed.

8. Click the **Renewal count** field and select a value for the number of times the equipment can be renewed.

9. In the **Fine Settings** section, click the **Fine interval** field and click the down arrow to display the description choices for the matrix fine settings interval. Select a choice.

10. Click the **Pickup fine rate** field and select a value that corresponds to the description that you set in the Fine interval field. This field allows you to set the value for the fines which are applied when equipment has not been picked up.

11. Click **Delivery fine rate** field and select a value that corresponds to the description that you set in the Fine interval field. This field allows you to set the value for the fines which are applied when the equipment has not been delivered.

12. Click the **Maximum fine** field and select a value that corresponds to the description that you set in the Fine interval field. This field allows you to set the value at which the fines stop accruing.

13. Click the **Fine grace period** field and select a value that corresponds to the description that you set in the Fine Interval field. This field allows you to set the value for the time that can pass before a fine begins accruing.

14. Click **Save** to save your changes to the database. Click **Cancel** to exit without saving.

Editing Equipment Matrix Settings

The procedure for editing Equipment Matrix Settings is shown in .

Procedure 2-24. Editing Equipment Matrix Settings

Use the following to edit Equipment Matrix settings.

1. Click the **Equipment** tab.

2. Highlight a setting and click the **Edit** button.

3. Click the **Settings** button.

4. Place your cursor in any of the field(s) that you want to edit and re-type the information. See the section above for details on the information you can edit.

5. Click **Save** to save your changes to the database, click **Cancel** to exit without saving.

Deleting an Equipment Matrix

The procedure for deleting an Equipment Matrix is shown in Procedure 2-25, Deleting an Equipment Matrix, on page 2-32.

Procedure 2-25. Deleting an Equipment Matrix

Use the following to delete an Equipment Matrix.

1. Click an **Equipment Matrix** to highlight it.

2. Click the **Delete** button.

   Result: The Delete Equipment Matrix Setting dialog box displays.

3. Click **Yes** to delete the Matrix; click **No** to retain the Matrix.

Item Matrix Settings

The Item Matrix Settings dialog box (Figure 2-29) allows you to configure an item matrix to be used for a policy group. Included is configurable information such as booking settings and fine settings.

Figure 2-29.   Item Matrix Settings dialog box

Creating a New Item Matrix

Procedure 2-26. Creating a New Item Matrix

Use the following to create a new Item Matrix.

1. Click the **Item** tab and then click the **New** button.

   Result: The Item Matrix Settings dialog box displays.

2. Enter a name for the item settings in the **Settings Name** field.

3. Select the **Can Deliver to?** checkbox if you want the item to be able to be delivered to locations.

4. Select the **Can Pickup?** checkbox if you want the item to be able to be picked up.

5. In the **Booking Settings** section:

   a. Click the **Booking interval** field and click the down arrow to display the description choices for the matrix booking interval. Select a choice.

   b. Click the **Maximum booking time** field and select a value that corresponds to the description that you set in the Booking interval field. This field allows you to set a policy for the maximum amount of time for which items can be booked.

   c. Click the **Renewal time** field and select a value that corresponds to the description that you set in the Booking Interval field. This field allows you to set a policy for the amount of time for which the items can be renewed for.

   d. Click the **Renewal count** field and select a value for the number of times the items can be renewed.

6. In the **Fine Settings** section:

   a. Click the **Fine interval** field and click the down arrow to display the description choices for the matrix fine settings interval. Select a choice.

   b. Click the **Pickup fine rate** field and select a value that corresponds to the description that you set in the Fine interval field. This field allows you to set the value of the fines which are applied when item(s) have not been picked up.

   c. Click **Delivery fine rate** field and select a value that corresponds to the description that you set in the Fine interval field. This field allows you to set the value of the fines which are applied when the item(s) have not been delivered.

   d. Click the **Maximum fine** field and select a value that corresponds to the description that you set in the Fine interval field. This field allows you to set the value of the time interval at which the fines stop accruing.

   e. Click the **Fine grace period** field and select a value that corresponds to the description that you set in the Fine Interval field. This field allows you to set the value for the time that can pass before a fine begins accruing.

7. Select the **Item Status Alerts** tab (see) and identify/select the item statuses that you want to display in the search results for media items. These same selected statuses also provide an alert/warning message when a media item is added to a booking and the item has one of the selected statuses that could affect availability. See for an example of the alert warning messages.

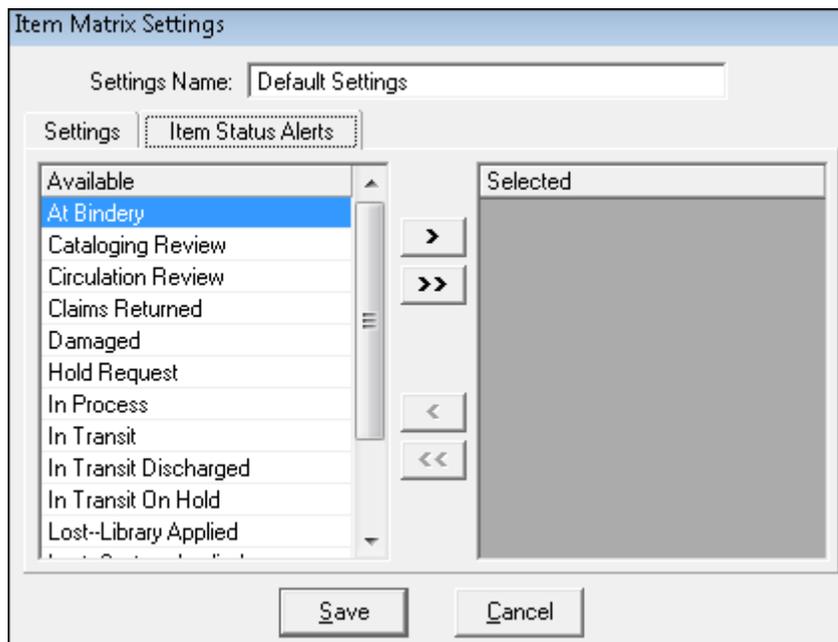**Figure 2-30.   Item Status Alerts tab**

Figure 2-31.   Item Status Alerts Example

8. Click **Save** to save your changes to the database. Click **Cancel** to exit without saving.

Editing Item Matrix Settings

The procedure for editing Item Matrix settings is shown in Procedure 2-27, Editing Item Matrix Settings, on page 2-36.

Procedure 2-27. Editing Item Matrix Settings

Use the following to edit Item Matrix settings.

1. Click the **Item** tab. Click the **Edit** button, then click the **Settings** button.

2. Place your cursor in any of the field(s) that you want to edit and re-type the information. See the section above for details on the information you can edit.

3.   Click **Save** to save your changes to the database; click **Cancel** to exit without saving.

Deleting an Item Matrix

The procedure for deleting an Item Matrix is shown in , on page .

Procedure 2-28. Deleting an Item Matrix

Use the following to delete an Item Matrix.

1.   Click an **Item Matrix** to highlight it.

2.   Click the **Delete** button.

Result: The Delete Item Matrix Setting dialog box displays.

3.   Click **Yes** to delete the Matrix; click **No** to retain the Matrix.

Policy Groups

The Media Scheduling Policy Group dialog box () is where you identify the locations and calendars for your Media Scheduling activities. There are settings and matrices that you use in your policy groups. Policy groups determine such things as overdue settings, patron pickup rules and how those rules and settings are associated with patron groups and media types.
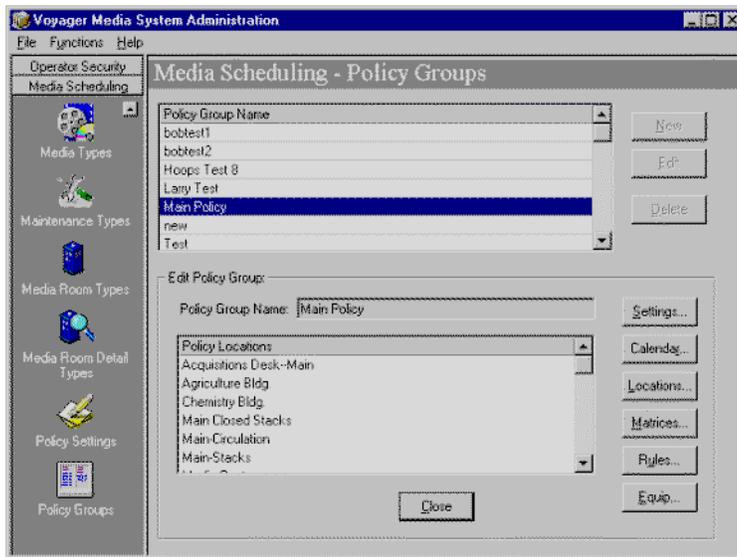
Figure 2-32.   Media Scheduling-Policy Groups

To access the Media Scheduling-Policy Groups window, click the **Policy Groups** button (Figure 2-33).

Figure 2-33.   Policy Groups Button

See Security Profiles and Policy Groups on page A-1 for a description of the relationship between Security Profiles definitions and Policy Groups definitions as it relates to operator authorizations for **Bookings** and **Inventory**.

Creating a New Policy Group

The procedure for creating a new Policy Group is shown in Procedure 2-29, Creating a New Policy Group, on page 2-39.

Procedure 2-29. Creating a New Policy Group

Use the following to create a new policy group.

1. Click the **New** button to open a new policy group screen.

   Result: This opens the **Policy Group Settings** dialog box (Figure 2-34).

Figure 2-34. Policy Group Settings

2. Enter a name for the new policy group in the **Group Name** field.

3. In the **Booking** section:

   a. Enter a number in the **Warning Interval** field to set the interval in minutes. This interval warns you, when making a booking, whether the material being booked is in use within that many minutes of your booking. This warning does *not* prevent you from making the booking.

   b. Enter a number in the **Block Interval** field to set the interval between blocks in minutes. Like the warning interval, this interval warns you, when making a booking, whether the material being booked is in use within that many minutes of your booking. However, this block prevents you from making the booking.

4. In the **Schedule Monitor** section:

   a. Enter a number in the **Cancel Unclaimed** box to indicate how many minutes after the time of pickup that a booking goes unclaimed before the unclaimed booking is canceled.

   b. Enter a number into the **Overdue Warning** box to designate the number of minutes after which overdue bookings are placed on the Warning list in the Schedule Monitor.

5. In the **Delivery Overnight Rules** section:

   a. Place a check in the **Shorten at Close** box in order to specify that for delivery bookings, where the time until closing is earlier than the time that the booking would normally be due, should be set to expire at closing. An empty checkbox indicates that the booking should roll over till the next morning.

   b. Place a check in the **Accrue Fines and Fees** box to designate whether overdue deliveries accrue fines and fees.

6. In the **Patron Pickup Rules** section:

   a. Place a check in the **Shorten at Close** box in order to specify that for pick-up bookings, where the time until closing is earlier than the time that the booking would normally be due, should be set to expire at closing. An empty checkbox indicates that the booking should roll over till the next morning.

   b. Place a check in the **Accrue Fines and Fees** box to designate whether overdue picked-up items accrue fines and fees.

7. In the **Overdue Settings** section:

    a. Enter a number in the **First Notice** box to indicate how many days after an item is overdue that the first notice is to be sent to the patron.

    b. Enter a number in the **Additional Notice Interval** box to indicate how many days after the previous notice is sent that a subsequent notice is to be sent to the patron.

    c. Enter a number in the **Additional Notice Count** box to indicate the maximum number of notices that is to be sent to the patron.

    d. Place a check in the **Allow Renew** box to determine whether or not renewal of overdue items is allowed.

8. In the **Lost Settings** section:

    a. Enter a number in the **Lost Interval** box to indicate how many days after an item is overdue that the item is considered lost.

    b. Enter a number in the **Processing Fee** box to set the processing fee for lost items.

    c. Placing a check in the **Charge Maximum Fine?** box sets whether the maximum fine is automatically charged for lost items.

9. Specify the Advanced Booking Warning Period timeframe if you plan to select the Advanced Booking Alert in Media Scheduling (Tools > Options > Charge/ Discharge tab). Select Minutes, Hours, or Days from the dropdown list and specify an amount.

Editing Settings for a Policy Group

The procedure for editing settings for a Policy Group is shown in .

Procedure 2-30. Editing Settings for a Policy Group

Use the following to edit a policy group's settings.

1. Select a policy group and click **Edit**.

    Result: The Edit Policy Group box opens.

2. Click the **Settings** button to edit the policy group's settings.

3. Click **Save** to preserve the settings or **Cancel** to discard them.

   Result: This closes the Policy Group Settings dialog.

4. Click the **Close** button to finish editing the policy group.

Deleting a Policy Group

The procedure for deleting a Policy Group is shown in .

Procedure 2-31. Deleting a Policy Group

Use the following to delete a Policy Group.

1. Click a **Policy Group** to highlight it.

2. Click the **Delete** button.

   Result: The **Delete Policy Group** dialog box displays.

3. Click **Yes** to delete the Policy Group; click **No** to retain the Policy Group.

Assigning the Calendar for a Policy Group

The **Calendar Settings** dialog box (Figure 2-35) allows you to assign calendars to a specific policy group. You can assign three different sets of calendars based on whether the booking is for a pickup, delivery or a room in the media center or library.
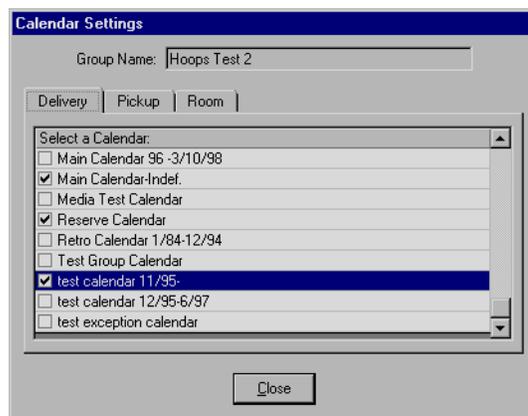
Figure 2-35.   Calendar Settings

The procedure for assigning calendar settings is shown in

Procedure 2-32. Assigning Calendar Settings

Use the following to assign calendar settings.

1.   Select a policy group and click **Edit**.

     Result: The **Edit Policy Group** dialog box opens.

2.   Click the **Calendar** button to edit the policy group's calendar.

     Result: The **Calendar Settings** dialog box displays.

3.   Click one of the tabs to display the calendar assignments for Delivery, Pickup or Room bookings.

4.   Click a box next to a calendar to change the assignment of the calendar to the location. These calendars are defined in the System Administration module. See the System Administration User's Guide for more information about circulation calendars.

NOTE:
Any changes that you make to these check boxes take effect *immediately*.
Voyager does not make changes only upon exiting the dialog box. Because of
this, you may experience a lag between checking the box and the change
registering while Voyager executes the change.

5. Click **Close** to close the Calendars dialog.

6. In the Media Scheduling window, click **Close** to finish editing the policy group.

Creating Locations for a Policy Group

The **Locations** dialog box ([Figure 2-36](#)) allows you to specify what can and
cannot be done at a particular location. You can include location properties such
as whether bookings can be made from here, whether items can be picked up
here, default settings for items being created at this location, and so on.

Figure 2-36.   Locations Settings

The procedure for creating locations for a Policy Group is shown in [Procedure 2-33](#), [Creating Locations for a Policy Group,](#) on page [2-45](#).

Procedure 2-33.   Creating Locations for a Policy Group

Use the following to create new locations for a policy group.

1.   Select a policy group and click **Edit**. The Edit Policy Group box opens.

2.   Click the **Locations** button.

    Result: This opens the **Locations** dialog for that policy group.

3.   Click the **New** button. The Locations dialog displays the **Select Locations to Add** block. These locations are created and defined in the System Administration module. For more information on Locations, see the System Administration User's Guide.

4.   Select a location to add and click the **Next>** button.

5.   Place a check in the **Booking Desk?** checkbox to establish this location as a location where bookings can be made. Placing a check in this field causes the **Notice and Report Print Location**, **Brief Record Creation**, and **Other Stuff** blocks to display.

6.   Place a check in the **Pickup Point?** checkbox to establish this location as a location where bookings can be made. Placing a check in this field causes the **Brief Record Creation** and **Other Stuff** blocks to display.

7.   Select the happening location for any booking activity from the **Notice and Report Print Location** drop-down menu.

8.   In the **Brief Record Creation** section, place a check in the **Suppress Bib Records?** checkbox to suppress newly created bibliographic records from displaying in WebVoyage.

9.   Specify the default item type for newly created items by selecting from the **Item Type** drop-down menu.

10. Specify the default location for newly created items by selecting from the **Location** drop-down menu.

11. In the **Delivery/Return Time (Minutes)** section, enter the time it normally takes for the room to be set up in the **Setup/Delivery Time** field by clicking the up/down arrow buttons or by typing the time directly into the field.

12. Enter the time it normally takes for the room to be cleaned up in the **Cleanup/Return Time** field by clicking the up/down arrow buttons or by typing the time directly into the field.

13. In the **Other Stuff** section, place a check in the **Delivery Staging?** checkbox to indicate that the location is to be used for staging deliveries.

14. Place a check in the **Collect Fines?** checkbox to indicate that the location is permitted to collect fines.

15. Enter the time that it takes to shelve items at this location by clicking the up/down arrow buttons next to the digit in the **Shelving Time** field and selecting the increments from the units drop-down menu. You can also type the time directly into the field.

16. Enter the number of days that items are generally in transit from this location by clicking the up/down arrow buttons by the digit in the **In Transit Days** field and selecting the increments from the units drop-down menu.

17. Click **Finish** to save the settings or **Cancel** to discard them.

18. In the Locations dialog, click **Close**. This closes the dialog box.

19. In the Media Scheduling window, click **Close** to finish editing the policy group.

NOTE:
For the media equipment booking request form to display in WebVoyáge, the OPAC Circ Desk selection in Circulation - Cluster Maintenance (see) must be included in the Media Scheduling - Policy Groups (see and).
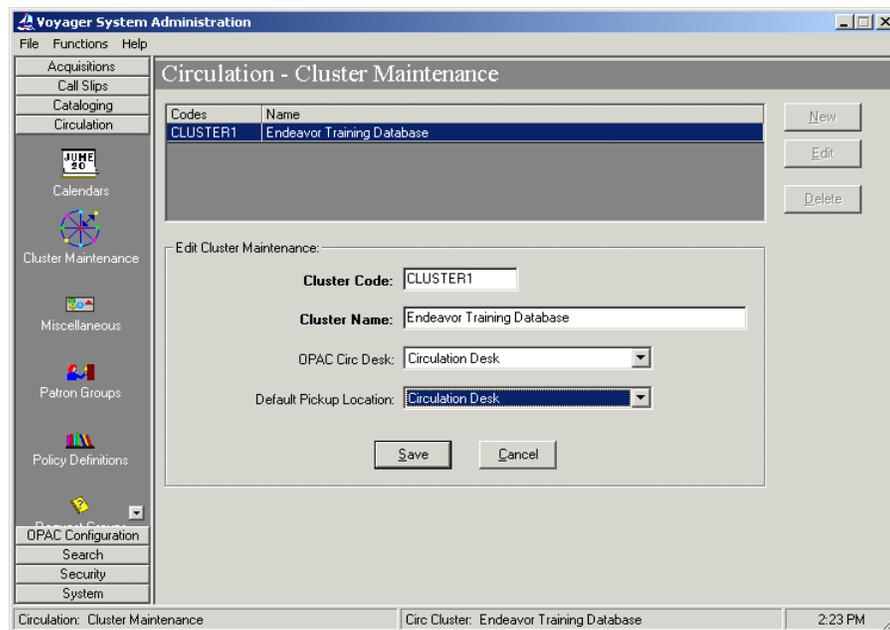
Figure 2-37.   Voyager System Administration Circulation - Cluster Maintenance
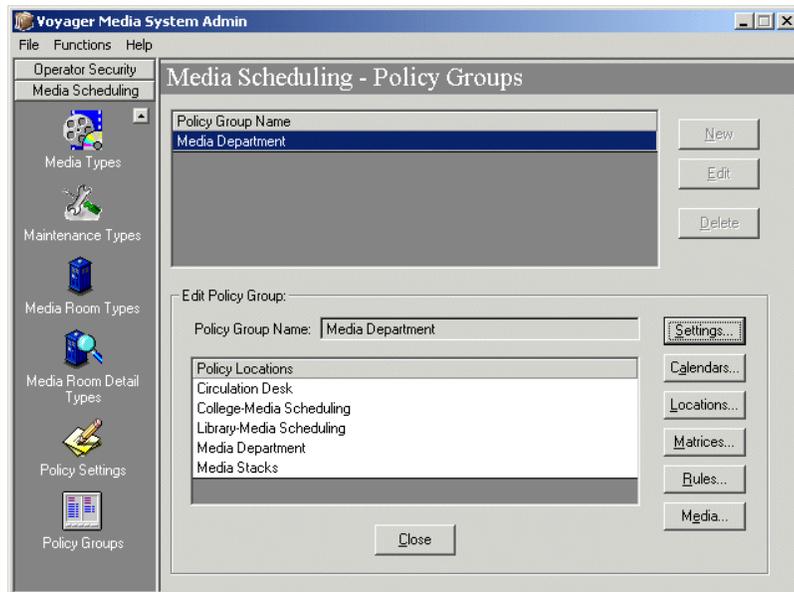
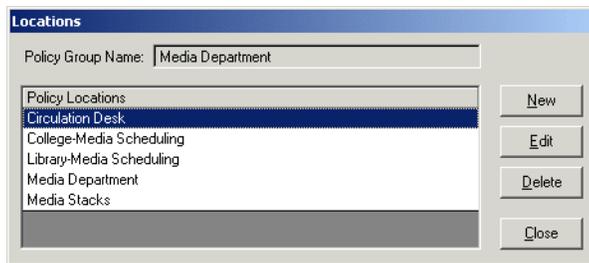**Figure 2-38.   Media Scheduling - Policy Groups**

Figure 2-39.   Media Scheduling - Policy Groups Locations setup

Editing Locations for a Policy Group

The procedure for editing locations for a Policy Group is shown in Procedure 2-34, Editing Locations for a Policy Group, on page 2-49.

Procedure 2-34. Editing Locations for a Policy Group

Use the following to edit the settings for a particular location.

1. Select a policy group and click **Edit**.

   Result: The **Edit Policy Group** dialog box opens.

2. Click the **Locations** button.

   Result: This opens the **Locations** dialog for that policy group.

3. Select the location that you want to edit and click the **Edit** button.

   Result: The Locations dialog displays the settings for that location.

4. Edit the settings for the location.

5. Click **Save** to preserve the settings or **Cancel** to discard them.

6. In the Locations dialog, click **Close**.

   Result: This closes the dialog box.

7. In the Media Scheduling window, click **Close** to finish editing the policy group.

Deleting a Location

Locations deleted from the Voyager Media System Administration module are are not completely deleted. The locations are deleted from the records in Voyager Media System Administration. However, they remain active in the System Administration module. To completely delete a location, you must delete it in the System Administration module. For more information, see the *Voyager System Administration User's Guide*.

Procedure 2-35. Deleting a Location

Use the following to delete a Location.

1. Click to highlight a **Location**.

2. Click the **Delete** button.

   Result: The **Delete Location** dialog box displays.

3. Click **Yes** to delete the Location or click **No** to retain the Location.

   Result: This saves or cancels the location request.

Policy Group Matrix Assignments

The **Policy Group Matrix Assignments** dialog box (Figure 2-40) allows you to determine what policy group is applied to a particular transaction. Based on the patron group and the type of room, equipment or item, you can specify that a particular Policy Matrix Settings group is used. You can make assignments for Room types, Equipment types and Item types. You can create new assignments, change existing ones and delete outdated ones.

The Room matrix allows you to specify what policy group should be applied to any room-related aspects of a transaction. This can be defined based on the Media Room Type and the patron group of the person submitting the request. You may create assignments for any combination of Room Types and patron groups. Rooms in Voyager Media Scheduling are assigned to a specific Media Room Type by setting the Room Type drop-down menu on the Details tab of the Room record in the Voyager Media Scheduling module.

The Equipment matrix allows you to specify what policy group should be applied to any equipment-related aspects of a transaction. This can be defined based on the Equipment Type and the patron group of the person submitting the request. You may create assignments for any combination of Equipment Types and patron groups. Equipment in Voyager Media Scheduling is assigned to a specific Equipment Type by setting the Equipment Type drop-down menu on the Details tab of the Equipment record in the Voyager Media Scheduling module.

The Item matrix allows you to specify what policy group should be applied to any item-related aspects of a transaction. (Items are the media added to a transaction on the **Media** tab of the request.) This can be defined based on the Media Type and the patron group of the person submitting the request. You may create

assignments for any combination of Media Types and patron groups. Media (i.e., items) in Voyager Media Scheduling are assigned to a specific Media Type by setting the Media Type drop-down menu of the item record (either through the Cataloging module or the Circulation module).

Assignments can be made to specific combinations of Patron Groups and Media/ Media Room/Equipment Types or globally to all Patron Groups and/or all Media/ Media Room/Equipment Types.

Figure 2-40.   Policy Group Matrix Assignments-Room tab

- Click the **Room**, **Item** or **Equipment** tabs to view or change assignments for Rooms, Items or Equipment, respectively.

- To close the Policy Group Matrix Assignments dialog box, click the **Close** button.

Creating a New Matrix Group

The procedure for creating a new Matrix Group is shown in .

Procedure 2-36. Creating a New Matrix Group

Use the following to create a new Matrix Assignments group.

1. Click the tab for the type that you want to associate with a patron group and a group of policy settings.

2. Click **New**.

   Result: The **New Matrix Assignments** dialog box displays.

3. Select the Type and Patron Group you want to associate, and choose a Settings category that you want to be assigned when that combination occurs.

4. Click **Save** to keep your changes and close the dialog box; click **Cancel** to discard them.

Editing a Matrix Group

The procedure for editing a Matrix Group is shown in .

Procedure 2-37. Editing a Matrix Group

Use the following to edit an existing Matrix Assignments group.

1. Click the tab for the type that you want to associate with a patron group and a group of policy settings.

2. Select the profile you want to edit.

3. Click **Edit**.

   Result: The **Edit Matrix Assignments** dialog box displays.

4. Change the settings that are to be applied to the displayed Type and Patron Group.

5. Click **Save** to keep your changes and close the dialog box; click **Cancel** to discard them.

Deleting a Matrix Group

The procedure for deleting a Matrix Group is shown in .

Procedure 2-38. Deleting a Matrix Group

Use the following to delete an existing Matrix Assignments group.

1. Click the tab for the type that you want to associate with a patron group and a group of policy settings.

2. Select the type you want to delete.

3. Click **Delete**.

Policy Group Rules

In the Policy Group Rules dialog box, you can establish rules for different kinds of Patron Groups and for Room, Equipment and Media Types. You can create different sets of rules for every single type. Each set of rules is associated with a particular Patron Group, Media Room Type, Equipment Type or Media Type. Rules can be created for specific Patron Groups, Media Types, Media Room Types, or Equipment Types or globally for all Patron Groups, Media Types, Media Room Types, and/or Equipment Types.

Patron Group Rules

The **Patron Group Rules** dialog box (Figure 2-41) lists all of the patron groups created in the System Administration module. For more information on patron groups, see the System Administration User's Guide.

Figure 2-41. Policy Group Rules - Patron Group Tab

- The procedure for creating rules for a Patron Group is shown in Procedure 2-39, Creating New Rules for a Patron Group, on page 2-54.

- The procedure for editing rules for a Patron Group is shown in Procedure 2-40, Editing Rules for a Patron Group, on page 2-56.

- The procedure for deleting rules for a Patron Group is shown in Procedure 2-41, Deleting Rules for a Patron Group, on page 2-56.

Procedure 2-39. Creating New Rules for a Patron Group

Use the following to create rules for a Patron Group.

1. Click the **New** button.

   Result: The **Add Patron Group** block displays.

2. Select the Patron Group that you want to add. Click the **Next>** button. The **Patron Group Rules** block displays.

3. Set rules for patron groups in the **Patron Group Rules** dialog box. If any are grayed out, this rule is not subject to change for the selected patron group. You can set the following rules.

Field Name	Description
Patron Group Requestable using OPAC?	Select this option to permit patrons in this patron group to make requests using the OPAC.
Overlapping Bookings?	Determines whether or not overlapping bookings by a patron of this type are allowed.
Fines Apply?	Sets whether fines apply to this patron group.
Fees Apply?	Sets whether fees apply to members of this patron group.
Early Pickup Window?	Determines how early before the time for which a booking is requested that it may be charged out.
Optional Maximums section	**NOTE:** These options may be turned on and off using the checkbox at the left of each option.
Outstanding Balance	Sets a maximum outstanding balance.
Number of Bookings	Sets the maximum number of bookings by a patron.
Items in a Booking	Sets the maximum number of items in a booking.
Pieces of Equipment in a Booking	Sets the maximum number of pieces of equipment that can be charged in a booking.
Late Returns	Sets the maximum number of late returns.
Canceled Bookings	Sets the maximum number of canceled bookings.
Unclaimed Bookings	Sets the maximum number of unclaimed bookings.

4. Click the **Finish** button to save the rules; click the **Back** button to change the Patron Group; or click **Cancel** to discard changes.

5. Click the **Finish** button when you are done editing the patron group rules. Click **<Back** to change the Patron Group. Click **Cancel** to discard changes and close the block.

Procedure 2-40. Editing Rules for a Patron Group

Use the following to change the rules for a Patron Group.

1. Select a Patron Group from the list and click **Edit**.

    Result: The **Patron Group Rules** block displays.

2. Edit the rules for patron groups in the **Patron Group Rules** dialog box.

3. Click the **Save** button when you are done editing the patron group rules or click **Cancel** to discard changes and close the block.

Procedure 2-41. Deleting Rules for a Patron Group

Use the following to delete a set of rules for a particular patron group.

1. Click a Patron Group.

2. Click **Delete**.

3. In the **Delete Patron Group** confirmation dialog box, click **Yes** to delete the rules or **No** to not delete the rules.

Room Type Rules

The **Room Type Rules** dialog box (Figure 2-42) lists all of the room types defined in the Media Room Type screens. For more information, see Media Room Types on page 2-20.
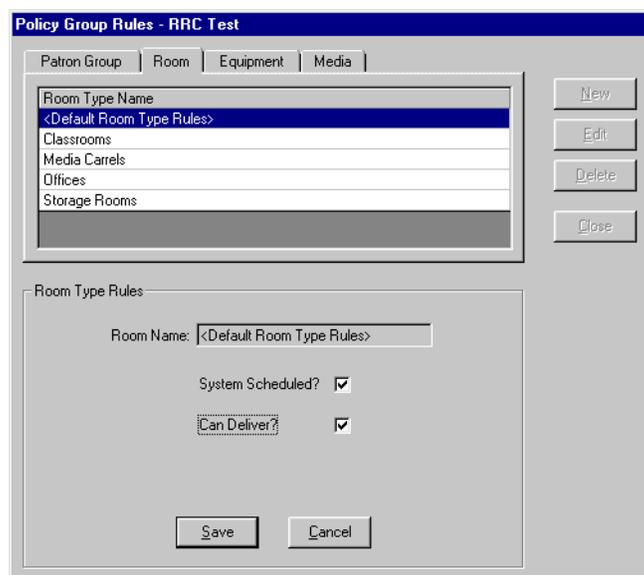
Figure 2-42.   Policy Group Rules - Room Tab

- The procedure for creating rules for a Room Type is shown in Procedure 2-42, Creating Rules for a new Room Type, on page 2-57.

- The procedure for editing rules for a Room Type is shown in Procedure 2-43, Editing Rules for a Room Type, on page 2-58.

- The procedure for deleting rules for a Room Type is shown in Procedure 2-44, Deleting Rules for a Room Type, on page 2-58.

Procedure 2-42. Creating Rules for a new Room Type

Use the following to create rules for a new Room Type.

1. Click the **New** button.

   Result: The **Add Room Type** block displays.

2. Select the Room Type that you want to add. Click the **Next>** button. The **Room Type Rules** block displays.

3. If the room can be scheduled by the Voyager Media Scheduling module put a check in the **System Scheduled?** checkbox. If the equipment in the room can be delivered to other locations, place a check in the **Can Deliver?** checkbox.

4. Click the **Finish** button when you are done editing the room rules. Click **<Back** to change the Room Type. Click **Cancel** to discard changes and close the block.

Procedure 2-43. Editing Rules for a Room Type

Use the following to change the rules for a Room Type.

1. Select a Room Type from the list and click **Edit**.

   Result: The **Room Type Rules** block displays.

2. If the room can be scheduled by the Voyager Media Scheduling module put a check in the **System Scheduled?** checkbox. If the equipment in the room can be delivered to other locations, place a check in the **Can Deliver?** checkbox.

3. Click the **Save** button when you are done editing the room rules. Click **Cancel** to discard changes and close the block.

Procedure 2-44. Deleting Rules for a Room Type

Use the following to delete a set of rules for a particular room type.

1. Click a Room Type.

2. Click **Delete**.

3. In the **Delete Room** confirmation dialog box, click **Yes** to delete the rules or **No** to not delete the rules.

Equipment Type Rules

The **Equipment Type Rules** dialog box (Figure 2-43) lists all of the equipment types defined in the Equipment Types screen. For more information, see Equipment Types on page 2-12.

Figure 2-43.   Policy Group Rules - Equipment Tab

- The procedure for creating rules for an Equipment Type is shown in Procedure 2-45, Creating New Rules for an Equipment Type, on page 2-59.

- The procedure for editing rules for an Equipment Type is shown in Procedure 2-46, Editing Rules for an Equipment Type, on page 2-60.

- The procedure for deleting rules for an Equipment Type is shown in Procedure 2-47, Delete Rules for an Equipment Type, on page 2-61.

Procedure 2-45. Creating New Rules for an Equipment Type

Use the following steps to add rules for a new equipment type.

1. Click the **New** button.

    Result: The **Add Equipment Type** block displays.

2. Select an equipment type and click **Next>**.

    Result: The **Equipment Type Rules** dialog box displays.

3. Set the rules for the Equipment Type selected. See Table 2-2.

Table 2-2.   Equipment Type Rules

Options	Description
Equipment Type	Displays the equipment type selected for editing rules.
Default Replacement Value	Enter the dollar value representing the replacement cost for this equipment type.
Setup Time (minutes)	Enter the time in minutes required to setup the equipment type selected.
Cleanup Time (minutes)	Enter the time in minutes required to pack up and return the equipment selected.
Equipment type Requestable using OPAC?	Select this option to indicate that this type of equipment is requestable through the OPAC.

Result: The options are selected for the **Equipment Type Rules**.

4. Click the **Finish**, **<Back**, or **Cancel**.

Result: This allows you to save, edit, or cancel the **Equipment Type Rules** options.

Procedure 2-46. Editing Rules for an Equipment Type

Use the following to edit the rules for an equipment type.

1. Select the **Equipment Type** and click the **Edit** button.

Result: The **Equipment Type Rules** workspace displays.

2. Enter a dollar value into the **Default Replacement Value** cell. Enter the time in minutes it takes to deliver and set up the equipment into the **Setup Time (minutes)** cell. Enter the time it takes to pack and return the equipment into the **Cleanup Time (minutes)** cell.

3. Click the **Save** button to save the rules or click **Cancel** to discard your changes.

Procedure 2-47. Delete Rules for an Equipment Type

Use the following to delete the rules for an equipment type.

1. Select the equipment type.

2. Click **Delete**.

3. In the **Delete Equipment** confirmation dialog box, click **Yes** to delete the rules or **No** to not delete the rules.

Media Type Rules

The **Media Type Rules** dialog box (Figure 2-44) lists all of the media types in the Media Types screen. For more information on Media Types, see Media Types on page 2-15.

Figure 2-44.   Policy Group Rules - Media Tab

- • The procedure for creating rules for a Media Type is shown in Procedure 2-48, Creating Rules for a Media Type, on page 2-62.

- The procedure for editing rules for a Media Type is shown in on page .

- The procedure for deleting rules for a Media Type is shown in on page .

Procedure 2-48. Creating Rules for a Media Type

Use the following steps to add rules for a new media type.

1. Click the **New** button.

   Result: The **Add Media Type** block displays.

2. Select a media type and click **Next>**.

   Result: The **Media Type Rules** dialog box displays.

3. Set the rules for the Media Type selected. See Table 2-3.

   Table 2-3.   Media Type Rules

Options	Description
Default Replacement Value	Enter the dollar value representing the replacement cost for this media type.
Media type Requestable using OPAC?	Select this option to indicate that this type of media is requestable through the OPAC.

   Result: The options are selected for the **Media Type Rules**.

4. Click the **Finish**, **<Back**, or **Cancel**.

   Result: This allows you to save, edit, or cancel the **Media Type Rules** options.

Procedure 2-49. Editing Rules for a Media Type

Use the following to edit the rules for a media type.

1. Select the Media Type and click the **Edit** button.

Result: The **Media Type Rules** workspace displays.

2. Enter a dollar value into the **Default Replacement Value** cell.

3. Click the **Save** button to save the rules, or click **Cancel** to discard your changes.

Procedure 2-50. Deleting Rules for a Media Type

Use the following to delete the rules for a media type.

1. Select the media type.

2. Click **Delete**.

3. In the **Delete Media** confirmation dialog box, click **Yes** to delete the rules or **No** to not delete the rules.

Policy Group Media

The Media Type dialog box (Figure 2-45) allows you to set a hierarchy of equipment types for each media type in a policy group. This allows you to specify what equipment is suggested to accompany a particular kind of media and what order in which they display. For example, if someone is charging out a videotape, you would want to suggest that they might need a VCR, or a TV, or an AV cart, or a TV/VCR unit.

In the **Media Types** dialog box, you can establish a list of media types, for each of which you can create a list of compatible equipment. This list displays under the Media Item Types for Booking option in the Media Equipment block on the Equipment tab of the booking.
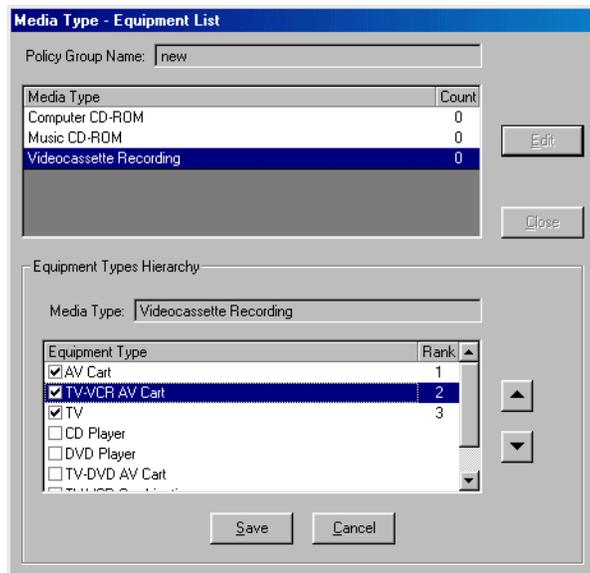
Figure 2-45.   Media Types - Equipment List Dialog Box

The procedure for editing a hierarchy for a media type is shown in Procedure 2-51, Edit a Hierarchy for a Media Type, on page 2-64.

Procedure 2-51. Edit a Hierarchy for a Media Type

Use the following to edit a hierarchy for a media type.

1.   Highlight a media type and click the **Edit** button.

    Result: The **Equipment Types Hierarchy** block opens.

2.   Place a check mark in the box next to the equipment types that you want to be related to this media type. Deselect the check box to remove it from the list.

3.   Arrange the hierarchy of equipment types with equipment types that can read the media type with the most useful equipment at the top of the list. You can move items up and down in the list by highlighting the item and clicking the up and down arrows. This is the order in which the categories display in the list in the booking dialog box.

4. Click **Save** when you are done ordering the equipment types; click **Cancel** to discard your changes.

5. Click **Close** when you are done editing media rules.

Menu Items

The following menus display when you open the Voyager Media System Administration module.

File

The **File** menu contains the functions shown in Table 2-4.

Table 2-4.   File Menu

Login Info	displays the login operator's name and ID and location	
Exit	closes this session of Media System Administration	

Functions

The **Functions** menu contains the functions shown in Table 2-5.

Table 2-5.   Functions Menu

Operator Security	switches the view to one of the Operator Security screens: Security Profiles, Locations, or Operators	
Media Scheduling	switches the view to one of the Media Scheduling screens: Equipment, Media, Maintenance, Media Room, or Media Room Detail Types; Policy Settings; or Policy Groups	

Help

The **Help** menu contains the functions shown in Table 2-6.

Table 2-6.   Help Menu

Help Topics	displays the table of contents for Media System Administration and opens the Help window	
Endeavor on the Web	connects to Endeavor Support Web or to the Endeavor home page	
About System Administration	displays information on the Media System Administration module	

Security Profiles and Policy Groups

A

Introduction

The security profiles and policy groups defiinitions determine operator authorization for the following:

- Viewing/processing equipment.
- Viewing/processing rooms.
- Viewing/processing items.

The following guidelines apply when setting these definitions.

- Locations always determine when a room or equipment can be viewed/processed in.
- The policy group the operator is logged into must provide authorization to the same location as specified in the definitions in order to book an item, room, or equipment. Otherwise, the warning message "Item belongs to a foreign policy group" displays. This message can be overridden and the booking can be completed.
- When the location is not specified in both the and definitions, the operator cannot process inventory or book items, rooms, and equipment.

The following tables summarize the operator authorizations for the different combinations of settings in the Security Profiles and Policy Groups definitions.

- Table A-1 contains information on Item Authorizations.
- Table A-2 contains information on Room Authorizations.

- [Table A-3](#) contains information on Equipment Authorizations.

Table A-1.   Item authorizations

Y	Y	Booking allowed
Y	N	Booking allowed with override
N	Y	Booking allowed
N	N	No booking allowed

Table A-2.   Room authorizations

Y	Y	Booking allowed Inventory privileges
Y	N	Booking allowed with override Inventory privileges
N	Y	Booking allowed No inventory privileges
N	N	No booking allowed No inventory privileges

Table A-3.   Equipment authorizations

Y	Y	Booking allowed Inventory privileges
Y	N	Booking allowed with override Inventory privileges
N	Y	Booking allowed No inventory privileges

Table A-3. Equipment authorizations

N	N	No booking allowed No inventory privileges

The Policy Groups definition is determined by the login location the operator selects when signing on to the Media Scheduling module.

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