Voyager®
Universal Borrowing User's Guide

March 2014

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About This Document

Purpose

This document provides instructions for configuring and using Voyager's®
Universal Borrowing™ (UB) module.

This user's guide discusses the following:

- Circulation Clusters overview
- Universal Borrowing overview
    - Important concepts and responsibilities
    - Variations on the UB theme
- Configuring your Voyager system for Universal Borrowing
    - Database Definitions
    - Circulation related configuration
    - OPAC configuration: UB Request Form
    - WebVoyáge™ configuration
    - Call Slip configuration
- Reports, Notices and Circulation batch jobs
- Prepackaged Microsoft Access® reports
- Questions and Answers about UB

Intended Audience

This document is intended for Voyager customers who have the Universal Borrowing module.

Reason for Reissue

This document incorporates and is being reissued for the following reasons:

- Updated Procedure 4-10, Editing the UB Barcode Lookup Configuration File, on page 4-36, Table 4-3 on page 4-36, and Figure 4-28 on page 4-39 related to the barcode pattern

- Updated the guide format for consistency with the other user's guides

Document Summary

This document consists of the following chapters:

Chapter 1   "Getting Started"
               Chapter 1 provides information on the necessary installations to use Universal Borrowing.

Chapter 2   "Overview of Universal Borrowing"
               Chapter 2 provides an overview of Universal Borrowing.

Chapter 3   "Database Definitions Configuration"
               Chapter 3 details how to configure UB databases in the System Administration module.

Chapter 4   "Circulation Configuration"
               Chapter 4 details how to complete the circulation related configurations in the System Administration module.

Chapter 5   "OPAC Configuration: UB Request Form"
               Chapter 5 provides information on editing the UB Request Form in the System Administration module.

Chapter 6   "WebVoyáge"
               Chapter 6 provides information on configuring WebVoyáge for UB and how to make a UB Request.

Chapter 7   "Call Slip Configuration and the Call Slip Dæmon"
               Chapter 7 provides information on Call Slip configuration.

Chapter 8   "UB Reports, Notices, and Batch Jobs"
               Chapter 8 discusses the circulation batch jobs associated with Universal Borrowing.

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 *Curator 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 installations and skills necessary for working in Universal Borrowing.

Prerequisite Skills and Knowledge

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

- Basic Microsoft® Interface navigation
- Basic UNIX® commands and navigation
- Basic Voyager System Administration Module
- Basic WebVoyáge configuration

Before You Begin

Before configuring Universal Borrowing, the Universal Borrowing extension module must be purchased and installed on your Voyager server.

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Overview of Universal Borrowing

2

Introduction

Voyager's Universal Borrowing provides a structure for unmediated, reciprocal borrowing between the Voyager libraries.

With Universal Borrowing, a patron can request, borrow, and return materials from any library in their school's consortium or from any Voyager libraries with reciprocal borrowing agreements. These circulation transactions occur between the Circulation Clusters that comprise a Voyager database.

Internal tracking for all borrowing transactions is computed in real time for efficiency and accuracy of records in all libraries.

Universal Borrowing automates the requesting and tracking necessary to make that philosophy a reality.

UB Requests are placed after searching one library catalog or many, or one catalog that includes all resources, such as Voyager's Universal Catalog^{TM} (UC). Most importantly, UB Requests are patron-initiated and unmediated. This empowers not only the patrons, but library staff as well.

This chapter discusses the following:

- Circulation Clusters overview
- Universal Borrowing process
- Important concepts and responsibilities

- Variations on the UB theme
- Decision table for configuring UB

Circulation Clusters

Voyager's circulation subsystem is based on the concept of a Circulation Cluster. Circulation transactions, holds, recalls, and short loans all occur within the context of a Circulation Cluster. Additionally, fines and fees for a patron will be maintained per Circulation Cluster. Course reserve material will be retained by a Circulation Cluster as well.

A Circulation Cluster contains patrons, items, and the rules under which they function. Those rules are defined in the Circulation Policy Group Definitions and the Circulation Policy Matrix. The patrons are members of at least one patron group which is connected to a Circulation Policy Group. Items have a location which is connected to a Circulation Policy Group. They also have an item type which is connected to a Circulation Policy Matrix associated with a Circulation Policy Group.

Each Voyager library has a Voyager database that consists of at least one, possibly more, Circulation Clusters. The single cluster setup is traditional Voyager functionality. Other libraries may choose to have a multi-clustered database where each Circulation Cluster operates as an independent organization for circulation purposes.

shows a diagram of Voyager database containing two Circulation Clusters.

Voyager Database with Two Circulation Clusters
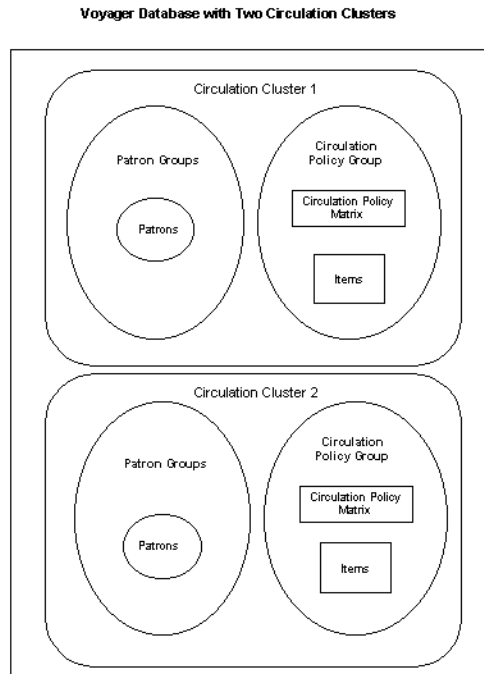
Figure 2-1.   Diagram of a Voyager database containing two Circulation Clusters

Types of UB Transactions

Taking Circulation Clusters into account, there can be three types of Universal Borrowing transactions.

- Transactions between a single cluster Voyager database and another single cluster Voyager database (see Figure 2-2)
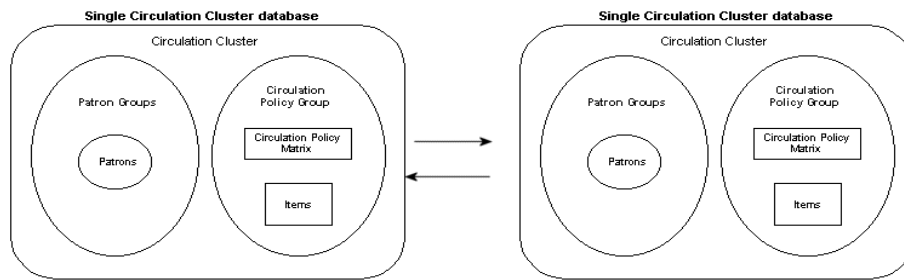
Figure 2-2.   Transaction between two single cluster Voyager databases

- Transactions between a single cluster Voyager database and a multi-cluster Voyager database (see Figure 2-3)
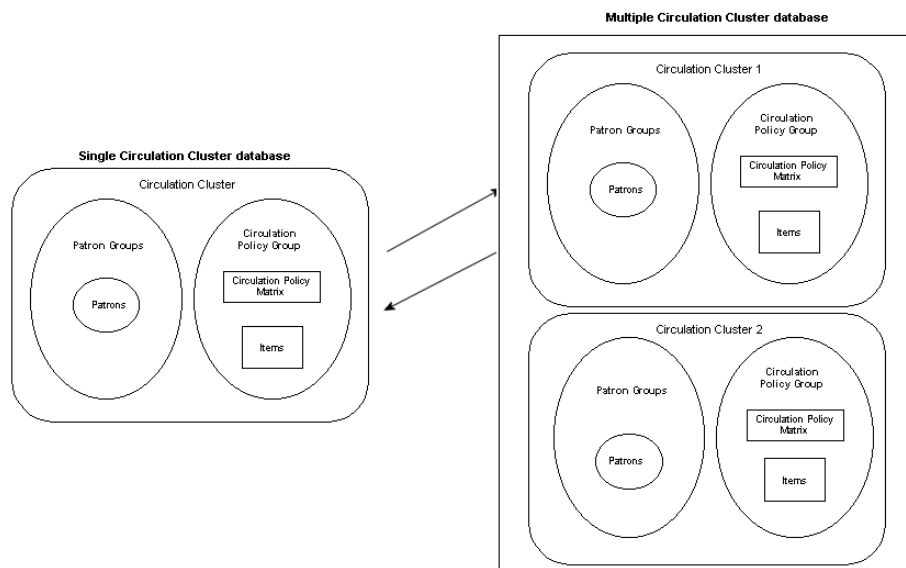
Figure 2-3.   Transaction between a single clustered Voyager database and a multi-cluster Voyager database

- Transactions between two multi-cluster Voyager databases (see Figure 2-4)
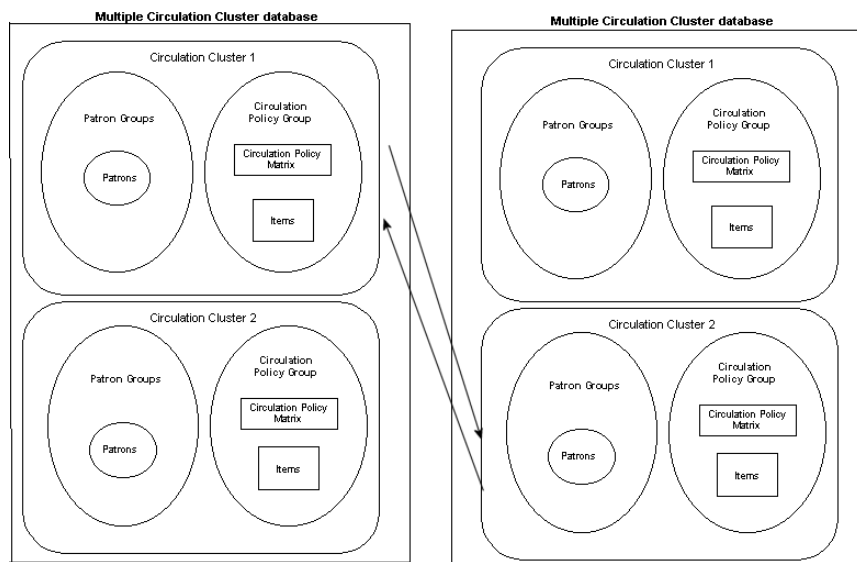
Figure 2-4.   Transaction between two multi-cluster Voyager databases

Circulation transactions are always governed by the item. When a patron at one library wants an item at another library, that is, wants to charge an item that does not belong to the Circulation Cluster to which their parent patron record belongs, a stub patron record must be created in the cluster to which the item belongs.

The creation of this stub record involves mapping patrons from one cluster into an appropriate patron group in the item's cluster. After the stub record is created, the charge transaction occurs according to the policies defined in the Circulation Policy Group and Circulation Policy Matrix connected to the item's and stub record's cluster.

See Patron Group Mapping on page 4-5 and the *Voyager Circulation Cluster User's Guide* for more information.

Names of the Circulation Clusters used in UB

Because UB circulation transactions take place between Circulation Clusters, in order to describe the UB process it is useful to define the four different types Circulation Clusters involved.

- The Home cluster is the Circulation Cluster to which the patron belongs.

- The Holding cluster is the Circulation Cluster to which the item belongs.

- The Visited cluster is the Circulation Cluster from which either the remote UB Request is placed **OR**, an item is returned.
- The Pickup cluster is the Circulation Cluster that is associated with the location at which the requested item is delivered for pick-up by the requesting patron.

Universal Borrowing Process

This section provides an example of the UB process from start to finish.

The patron:

- Searches for an item
- Places a UB Request for the item (if available)
- Picks the item up and charges it (UB Charge)
- Returns the item (discharged at the circulation desk)

The system:

- Maps the patron's patron group into a patron group belonging to the item's Circulation Cluster
- Determines all available requests
- Updates or creates the patron's stub patron record (when UB Request submitted)
- Checks for any block conditions (at time of request and charge)
- Routes the item as necessary
- Keeps circulation transaction statistics

To keep track of the different Circulation Clusters involved, we'll use names for the various clusters rather than Home, Holding, Visited, and Pickup (see).

Table 2-1.   Names given to the type of cluster in the example

Type of Circulation Cluster	Name in example
Home Circulation Cluster	Aimer University
Holding Circulation Cluster	Blake College
Visited Circulation Cluster	Cooper Community College
Pickup Circulation Cluster	Dyer State University

1. John Q. Student (his Home cluster is Aimer) visits the library at Dyer State University. He searches Dyer's OPAC for the title *Prologue* by Maston O'Neal.

   Dyer doesn't own the title so John clicks the **Databases** button in WebVoyáge. John selects the Aimer, Blake, and Cooper catalogs from the list of libraries that displays on the **Select Database** page. John repeats the search among the three catalogs (a simultaneous search) and finds that Blake owns a copy of *Prologue* (see Figure 2-5).

NOTE:
If Aimer, Blake, Cooper, and Dyer contributed to a Voyager Universal Catalog, John could have done his search in the UC database instead of performing a simultaneous search among three databases. In fact, WebVoyáge can be configured so then whenever a patron receives a `No Hits` message, a search redirect button displays. See the *Voyager WebVoyáge User's Guide* for information on this feature.
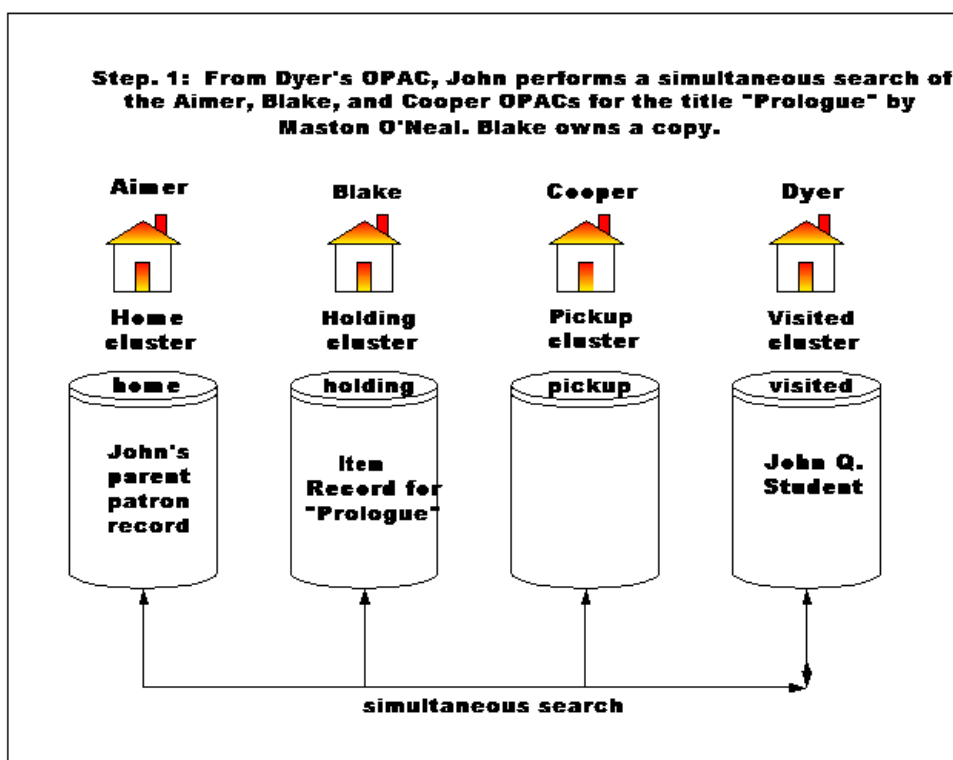
Figure 2-5.   Simultaneous search among three databases

2. John clicks the **Request** button in WebVoyáge and the **Patron Logon** page displays. He is asked to choose his **Home Library** from a drop-down list of Circulation Clusters in his and all the associated UB libraries. He chooses Aimer from the list then enters either his Barcode, Social Security Number (SSN), or Institution ID, enters his last name, and clicks the **Login** button.

Behind the scenes:

- Dyer (the Visited cluster) connects to Aimer (the patron's Home cluster) to collect patron information including John's patron group, and to identify if his patron group is UB eligible.

- Dyer checks the local settings to determine which local patron group his home patron group is mapped into, to identify the local patron group as eligible to borrow locally, and to determine which forms display in the **Type of Request** drop-down list (see Figure 2-6).
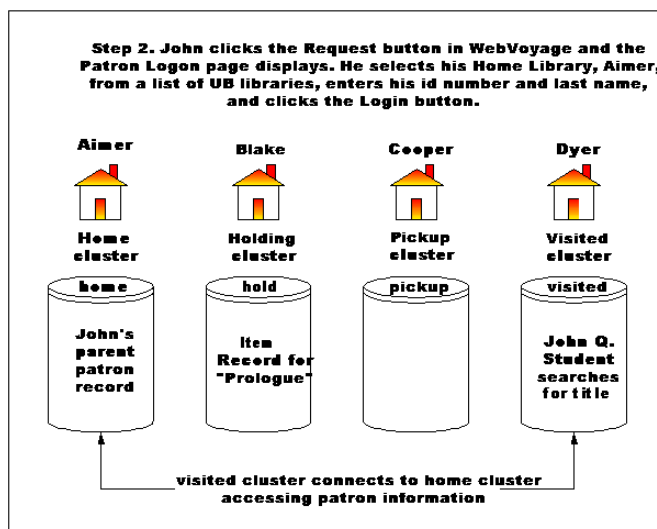
Figure 2-6.   Logging in to WebVoyáge to submit a UB Request

⚠ **IMPORTANT:**
If the patron cannot be automatically mapped into the item's Circulation Cluster they cannot make a request.

3. If John is not blocked, the **Request** page displays. From the **Type of Request** drop-down list, John selects the UB Request form and clicks **OK**.

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Behind the scenes:

- Armed with the patron's home patron group, Dyer (the Visited cluster) queries each database that owns the item and asks:

    - if any of the selected items in the database are eligible, that is their item status is either Discharged or Not Charged

    - if a patron in the mapped patron group is permitted to check out an item of that type (based on the item's circulation group matrix)

- Dyer collects the response from each potential holding cluster and if at least one eligible item can be borrowed from at least one holding cluster, it permits the UB Request form to display.

- The bibliographic information (title and author) for the record automatically displays. Because Blake is the only library which owns a copy of the item, Blake displays in the **Library** field. If John had found copies of the title in several different clusters, the Dyer cluster would choose one of the libraries to display at the top of the list in the **Library** field, followed alphabetically by the remaining eligible libraries. John could accept the first listed cluster or choose a different cluster from the list. If Blake owned more than one copy of the title, the **Copy** field would list all eligible copies.

NOTE:
To have only one holding cluster display in the **Library** field see .

4. John re-enters his identification information (either his Barcode, Social Security Number, or Institution ID whichever was used at login). The **Pick Up Library** field lists all UB defined databases. John chooses Cooper Community College from the pickup list. Based on that choice the system alphabetically lists all Pickup desks defined for Cooper in the **Pick Up At** field. John chooses the Main Circulation Desk.

5. The **Not Needed After** field defaults to the number of days defined for the UB Request form in the `opac.ini` file. See .

6. John clicks the **Submit Request** button when all the fields are complete.

    Behind the scenes:

    - Dyer double-checks that the item is still UB eligible.

    - Blake (the Holding cluster) takes John's patron information (home library, ID, and last name), connects to Aimer (his Home cluster), and checks Aimer's regular circulation policies for the patron group(s) to which John belongs. If John has any patron blocks based on those circulation policies, his UB Request is not accepted.

- If John does not have any patron blocks at Aimer, the Blake database next checks the UB polices at Aimer to see if John has any aggregate UB blocks. If John has any patron blocks based on the UB policies, his UB Request is not accepted.

- If John does not have any UB patron blocks at Aimer, the Blake database checks its own circulation polices and matrices to see if John has any patron blocks. If John has any patron blocks based on the Blake circulation policies and matrices, his UB Request is not accepted (see Figure 2-7).

NOTE:
If one of the databases involved goes offline for some reason, the request is not accepted.
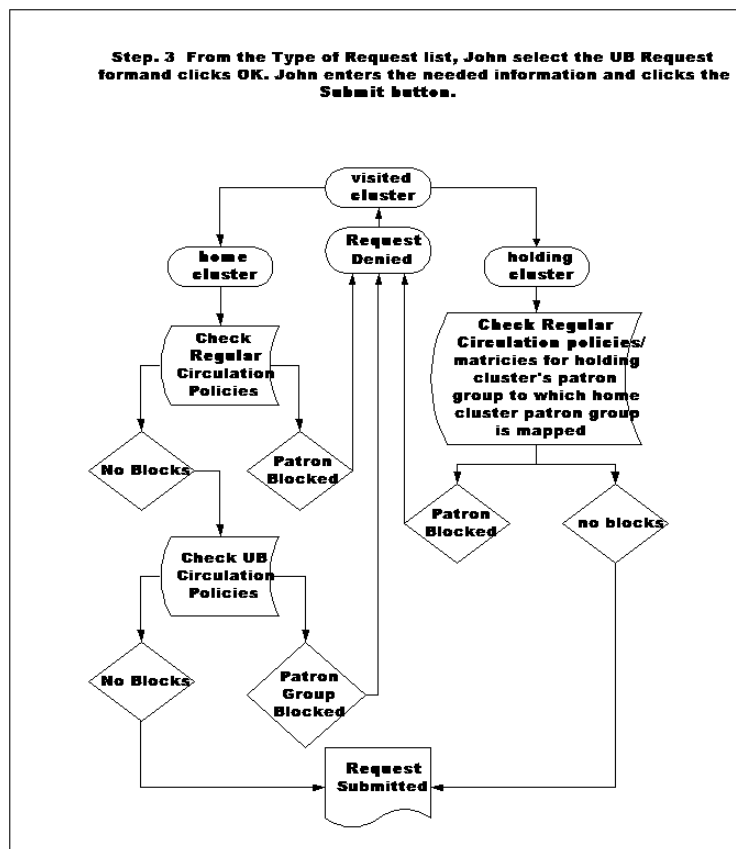
Figure 2-7.   Checking patron's circulation policies to allow UB Request

7. John is not blocked so WebVoyáge displays a message stating `Your Patron Initiated Request was Successful.` A stub patron record, populated with his patron information from Aimer (the Home cluster) is created at Blake (the Holding cluster). John waits to be notified that his request is available at Cooper (the Pickup cluster). The status of the item, at this point, is Pending. The Pending status makes this item ineligible for another UB Request. If John checked his **Patron Information** page in WebVoyáge, he would see his request in the **Requests Pending** section.

8. At Blake, a computer set to automatically print UB Requests prints out John's UB Request. A staff person takes the UB Request, finds the book on the shelf, processes the request in the Call Slip module and the status of the item changes to In Transit On Hold. When the item is processed, a stub patron record is created at Cooper (the Pickup library). The staff person sends the item to Cooper.

9. When the item arrives at Cooper, a staff person discharges the item in the Voyager Circulation module.

   Behind the scenes:

   - Cooper checks that the item is at the correct library and the correct circulation desk (as selected on the UB Request form).

     - If the item is at the correct pickup library but the wrong circulation desk, the person discharging the item sees a pop-up note displaying the correct circulation desk and a message to send to item to that circulation desk.

     - If the item is at the wrong pickup library, the person discharging the item sees a pop-up note displaying the correct library and a message to sent the item to that library.

     - If the UB Request has expired before reaching the correct pickup library, the person discharging the item sees a pop-up note displaying a message to send the item back to the Holding library.

   - If the item is at the correct library and the correct circulation desk, the item is discharged. The status of the item becomes Available for Pick-Up which queues an Item Available notice to be sent to John from Cooper (the Pickup library). In WebVoyáge, John's request would move from the **Requests Pending** section of the **Patron Information** page to the **Items Available** section (see Figure 2-8).
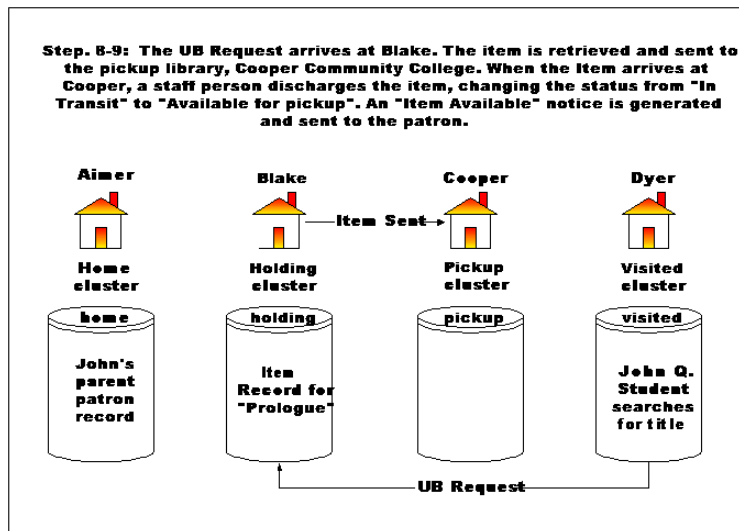
Figure 2-8.   Accepting the UB Request, retrieving and sending the item

10. After running Circjob 5 (see Standard Circulation Reports and Notices on page 8-2) the Item Available notice is generated. John receives the notice and goes to Cooper to pickup the item.

Behind the scenes:

- Cooper forwards the charge information to Blake (the Holding cluster). Blake contacts Aimer (the home cluster) and checks the regular circulation policies and UB circulation policies. These are checked at the time of charging to determine if John has incurred any blocks since his record was checked at the time his request was submitted and accepted.

- If John does not have any new blocks, the staff person proceeds with the transaction.

11. At the Main Circulation desk the item is charged (UB Charge) to John.

Behind the scenes:

- Cooper contacts Blake (the Holding cluster) to check the circulation policies and determine a due date. The item is charged to John's stub patron record at Blake and he takes the item (see Figure 2-9).
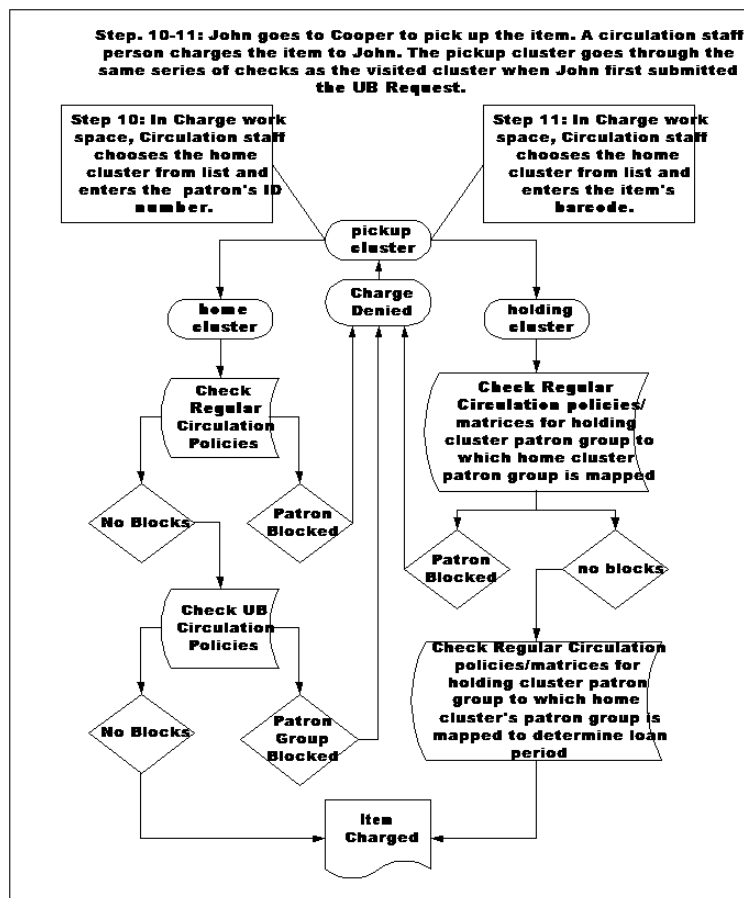
Figure 2-9. Checking circulation policies for charging the UB item

12. Upon the successful charge, Blake informs Aimer of the transaction. If John checks his patron information in WebVoyáge, the charged item would display in the **Charged Items** section of the **Patron Information** page.

13. John can return the item to any library in the consortium.

- If John returned the item to a library other than Blake (the Holding cluster), a staff person would select Blake from the drop-down list of UB libraries in the **Discharge** work space and scan the item's barcode into the **Barcode** field. The item is discharged, a pop-up note displays a message to return the item to Blake and a routing slip prints. The item now has a status of In Transit Discharged. When Blake receives the item, they discharge it, the status of the item changes to Discharged, and it is now available for another UB Request or circulation transaction.

- If John returns the item to Blake (the Holding cluster), circulation staff perform a regular discharge, and the status of the item would be Discharged.

- When discharged from the patron, the system removes the transaction from the stub patron record in the Blake cluster. The system also sends the discharge information to Aimer to update the UB patron counters on the parent patron record.

The above description is one example of a Universal Borrowing transaction. There are other variations depending on which cluster is the home, holding, visited, and pickup cluster. See .

Important Concepts in UB

- All Universal Borrowing transactions take place in real time, provided the databases involved are up and running.

- Universal Borrowing is available whether the patron is searching a single catalog, multiple catalogs via simultaneous searching, or Voyager's Universal Catalog.

- Universal Borrowing Requests can only be placed through WebVoyáge.

- WebVoyáge is the only place where all of a patron's UB Requests (pending or available), charges, or fines and fees are displayed.

Responsibilities of the Libraries

- Fines and fees are always the responsibility of the Holding cluster.

- Original patron records, including UB statistics, are always maintained by the Home cluster.

- The Pickup cluster is always responsible for charging the item to the patron.

- The Visited cluster at which the item is returned is responsible for the actual discharge of the item. For example, it removes the charge from any stub patron records and the home patron record. A subsequent discharge at the Holding cluster changes the item's status from In Transit Discharged to Discharged.

- Each library is responsible for defining other UB libraries and any associated polices in their own System Administration module.

Variations on the UB Theme

There are several different variations of the Universal Borrowing theme, depending on which cluster is the Holding, Home, Visited, and Pickup cluster. When each of these is specified, two questions can be answered.

- Is a UB Request possible?
- Is a UB Charge possible?

Visited Cluster is also the Holding Cluster

Four of the variations include the combination in which the Visited cluster is also the Holding cluster, examples of these variations are found in .
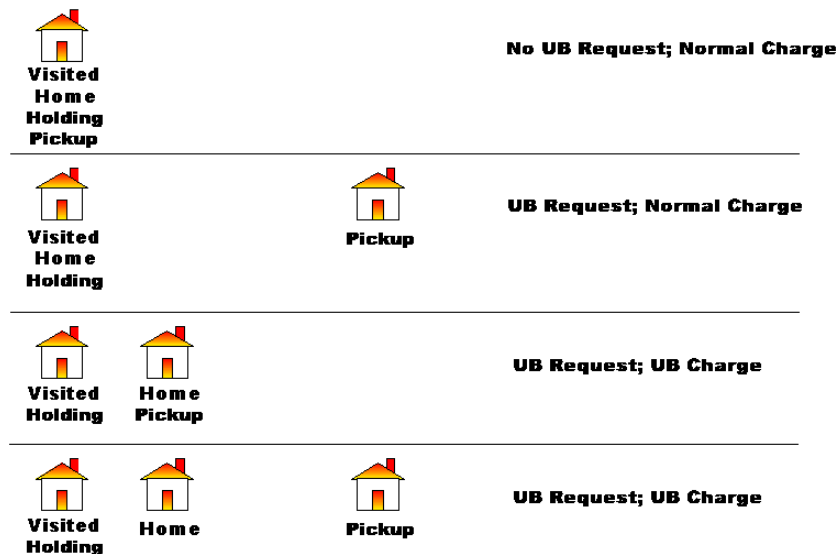
Figure 2-10.   **UB Variations - Visited cluster is also the Holding cluster**

In the first variation, the patron is not allowed to place a UB Request and the charge transaction would be considered a normal charge. In the second variation, the patron places a UB Request, however it is a normal charge. In the third and fourth variations UB Requests are placed and charging the item to the patron is a UB Charge because the patron's Home cluster is not the Holding cluster.

Holding Cluster is also the Pickup Cluster

The next four variations include combinations in which the Holding cluster is also the Pickup cluster. In this combination, a patron can submit a UB Request, if it has been configured in System Administration. See Circulation - Miscellaneous Work Space on page 4-32. This configuration allows a UB Request when the patron is connected to the Holding cluster's OPAC. This means that a patron would attempt to place a UB Request for an item in the Holding cluster's catalog and then, on the UB Request form, select the same cluster as the Pickup cluster. This is related to the ability to page an item for retrieval. Each cluster in the group can decide whether or not they want to retrieve items for a UB Request to be picked up in their library rather than being sent to a Pickup library.
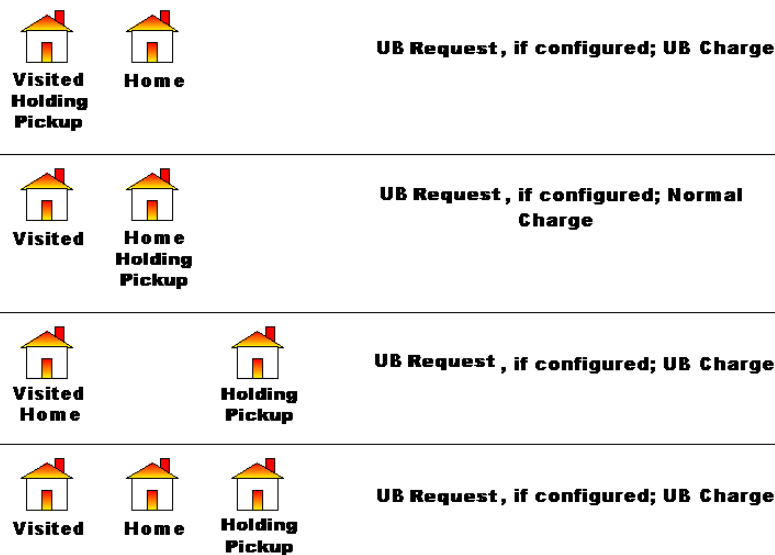
Figure 2-11.   UB Variations - Holding cluster is also the Pickup cluster

Figure 2-11 is a graphical representation of these four variations. In the first, third, and fourth variation, the patron is allowed to place a UB Request, if the library has configured their system to accept a UB Request. A charge transaction for these variations would be considered a UB Charge. In the second variation, the patron is also allowed to place a UB Request if it has been configured. However, a charge transaction would be considered a normal charge because the patron's Home cluster is also the Holding and Pickup cluster.

All Other Variations

In the remaining variations (Figure 2-12), UB Requests are allowed and charge transactions are considered UB Charges. The only exception is the last variation where a normal charge transaction takes place rather than a UB Charge transaction. This is because the Home cluster is also the Holding cluster.
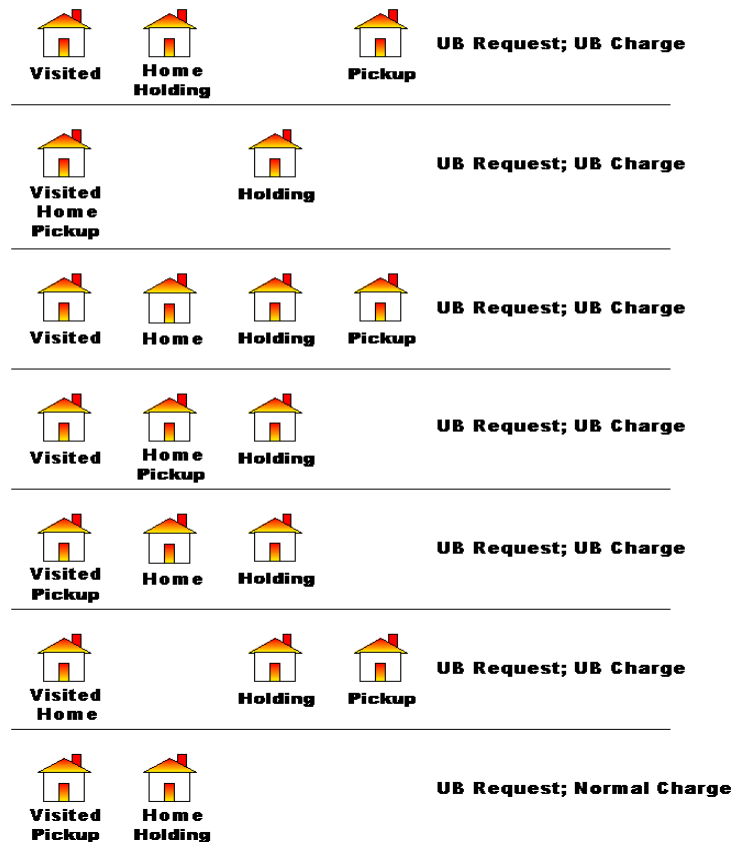
Figure 2-12. UB Variations for UB Requests and UB charges

Configuring Voyager for Universal Borrowing

The majority of the configuration for Universal Borrowing takes place in the System Administration module. Additional configuration occurs in the various files on the server used for WebVoyáge.

In System Administration you:

- Define the UB databases
- Add UB-specific patron groups and associate them with policies (if wanted)
- Define Patron Group Mappings
- Create UB Policy Definitions
- Edit the UB Request form seen in WebVoyáge (if wanted)
- Set up Call Slip Print Groups

In WebVoyáge edits in the following files are made to accommodate Universal Borrowing information:

- `opac.ini` file
- `connect.ini` file
- some `*.htm` and `image` files

⚠ **IMPORTANT:**
Universal Borrowing is dependent on cooperation between libraries. All libraries in the group must have information about each other in order to enable successful communication between databases. Undefined UB databases or undefined UB patron groups in System Administration result in unsuccessful UB Requests.

Use Table 2-2 through Table 2-5 to determine the required and optional configurations.

Voyager Configuration Table - System Administration

Table 2-2 details Universal Borrowing configuration in the Voyager System Administration module.

Table 2-2.   System Administration Module Configuration

Topic	Notes	Required	Page
Database Definitions	Define databases and connection information. This must be set in order for databases to communicate with each other and before remote patron groups can be mapped to local patron groups.	Yes	3-2
Patron Groups	Use if unique UB patron groups are preferred for mapping remote patron groups. Allows you to map remote patron groups to local patron groups with circulation policies and matrices that differ from your local patron groups.	No	4-4
Circulation Policy Definitions and Matrix	If new UB patron groups are created they must be added to a circulation policy group and added to the circulation policy matrices.	No	4-4
Patron Group Mappings	Must determine the mappings for remote patron groups. This defines which groups remote patrons will be mapped into.	Yes	4-5
UB Policy Definitions	Must be set for local patron groups to allow UB Requests and to set UB patron blocks.	Yes	4-24
Circulation - Miscellaneous	Configure if you want to allow UB Requests where the Holding library is also the Pickup Library.	No	4-32
OPAC Request Forms	You can change the name of the UB Request form and modify the instructions.	No	5-2
Call Slip Print Groups	Must be set to print request information, retrieve item, and produce UB routing slips.	Yes	7-3

WebVoyáge Configuration Table - opac.ini File

Table 2-3 details Universal Borrowing configuration in the `opac.ini` file.

Table 2-3.   UB-related configuration in the opac.ini file

Stanza	Notes	Required?	Page
`[Logon_Page]`	Includes the `HomeLibrary` variable which controls the text that displays in front of the database drop-down menu on the **Logon** page.	No	6-3
`[Patron_Info_Page]`	Allows you to define the various sections of the **Patron Information** page as well as control any labels and colors on the page.	No	6-4
`[Patron_Request_ Page]`	Allows you to define color settings for the page that displays after the successful submission of a UB Request.	No	6-9
`[Request_Dialogs]`	Includes three variables which must be defined for each library: `UBLibrary`, `UBPickupLibrary`, `UBPickupDesk`.	Yes	6-10
`[Request_Page]`	Allows you to define color setting for the page that displays if there is a validation error after a patron clicks the **Submit** button on the UB Request form.	No	6-9
`[Request_Select_ Page]`	Allows you to define color settings for the page on which a patron selects a request form.	No	6-9
`[Title_Bar]`	Contains variables that controls the text in the title bar of various WebVoyáge pages, including the **UB Request** page.	No	6-12
`[UB_Page]`	The `TurnOffLibraryDropDown` variable can be turned on or off to control the **Library** drop-down list on the UB Request form.	Yes	6-12
`[View_Record_Page]`	Enables the ability to jump from a list of holding libraries to the actual holding library information and then back to the list at the top of the holdings display	No	6-18

NOTE:
No in the required column in the table above indicates that default data elements are in place and do not need to be changed. However, you can modify any of the defaults if you want.

WebVoyáge Configuration Table - connect.ini File

Table 2-4 details Universal Borrowing configuration in the `connect.ini` file.

Table 2-4.   UB-related configuration in the connect.ini file

Stanza	Notes	Required?	Page
Add UB database information	Must be defined for simultaneous searching and for library (cluster) names to display on drop-down list on **Databases** page. The Universal Catalog must also be defined here, if applicable.	Yes	6-21

WebVoyáge Configuration Table - *.htm and image files

Table 2-5 details Universal Borrowing configuration of the `*.htm` and `images` files.

Table 2-5.   UB-related configuration of the *.htm and images files

*.htm/image file	Notes	Required	Page
ubb_addr.htm	Message for patrons that their patron record address is invalid.	No	6-33
ubb_citems.htm	Message for patrons who have reached the maximum number of charged items.	No	6-33
ubb_cret.htm	Message for patrons who have reached the maximum number of claims returned items.	No	6-33
ubb_dupl.htm	Message for patrons with UB Requests for the same item.	No	6-33
ubb_fines.htm	Message for patrons who have reached their maximum fine limit.	No	6-33
ubb_limit.htm	Message for patrons who have reached the maximum number of UB Requests allowed.	No	6-33

Table 2-5.   UB-related configuration of the *.htm and images files (Continued)

*.htm/image file	Notes	Required	Page
ubb_lost.htm	Message for patrons who have reached the maximum number of lost items.	No	6-33
ubb_odue.htm	Message for patrons who have reached their limit for overdue items.	No	6-33
ubb_paging.htm	Message for items whose home library is also the pickup library.	No	6-33
ubb_pexp.htm	Message for patrons with an expired patron record.	No	6-33
ubb_policy.htm	Message for patrons not authorized to borrow.	No	6-33
ubb_shelf.htm	Message for patrons who have reached the maximum number of self-shelved items.	No	6-33
ubb_unavail.htm	Message for items not available for Universal Borrowing.	No	6-33
ubnoitems.htm	Message that displays when no items are available for Universal Borrowing.	No	6-33
ubrequest.htm	This is the help *.htm for the UB Request form.	No	6-33
UpLocalDB.gif	This is the image for the **Local Database** button.	No	6-36

NOTE:
When no configuration is required, there are default data elements in place, modify any of the defaults if you want.

Database Definitions Configuration

3

Introduction

Database Definitions must be configured in the System Administration module in order to use Universal Borrowing. These definitions include connection information for each database to which you want to connect, as well as rules to govern the connections.

Security

Depending on your security profile, you may or may not be able to access the **Search - Database Definitions** work space. Operators that have the **System-wide** check box checked on the **Profile Values** tab in the **Security - Master Profiles** work space in the System Administration do have access to that work space (see Figure 3-1).
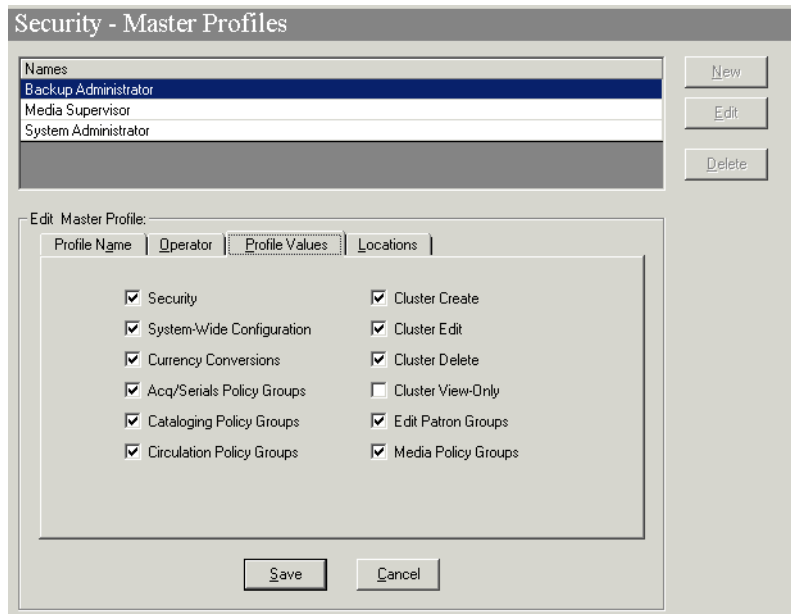
Figure 3-1.   System-wide check box

See Master Security Profiles in the *Voyager System Administration User's Guide* for more information.

Search - Database Definitions work space

The **Search - Database Definitions** work space (Figure 3-2) allows administrators to configure and maintain the Universal Borrowing databases.
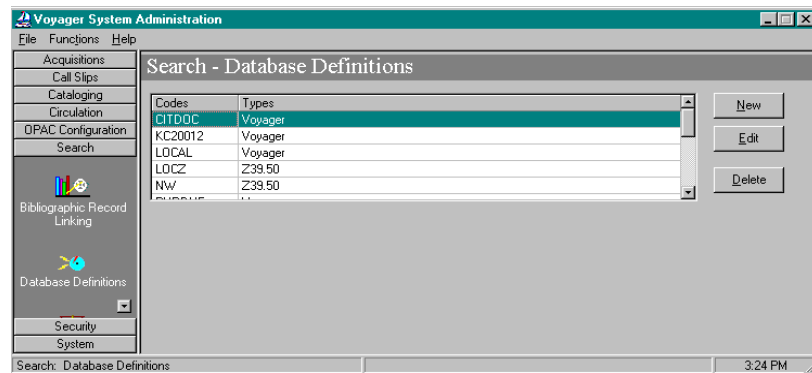
Figure 3-2.   Search - Database Definitions work space

Figure 3-3 shows the **New Database Definition** section of the **Search - Database Definitions** work space.

Figure 3-3.   New Database Definition section, Database tab

This section contains up to four tabs:

- **Database** tab
- **Definitions** tab
- **Access Control** tab (displays only if the **Public Use** check box is not checked)
- **Remote Cluster Cache** tab (displays only if **UB** check box is checked)

Database Tab

The **Database** tab contains the following database information.

- Database code, up to 8 alphanumeric characters
- Database name, up to 100 alphanumeric characters
- Description, up to 200 alphanumeric characters
- Protocol (Voyager or Z39.50)
- Type (bibliographic or citation)
- Public Access, UB, and Staff Suppress check boxes

Procedure 3-1. Configuring the Database Tab

Use the following to configure the **Database** tab.

1. In the Voyager System Administration module, select **Search** from the listbar, and click the **Database Definitions** button.

   Result: The **Search - Database Definitions** work space opens.

2.

If you are...	Then...
Adding a new database	1. Click the **New** button

   Result: The **New Database Definitions** section opens (see Figure 3-3).

Editing an existing database	1. Highlight the database
	2. Click the **Edit** button

   Result: The **Edit Database Definitions** section opens.

3. Select the **Database** tab (if needed).

   Result: The **Database** tab opens (see Figure 3-4).

Figure 3-4.   Database tab

4. Enter the database code in the **Code** field for the database you are adding.

    This is the same code entered into the `connect.ini` file to display this database for selection in the **Databases** page of WebVoyáge (see <u>Connect.ini File</u> on <u>page 6-21</u>).

5. Enter the database name in the **Name** field for the database you are adding.

6. Enter a description of the database in the **Description** field for the database you are adding, if wanted.

7. In the **Protocol** section, define the database as a Voyager database by selecting the **Voyager Database** radio button.

8. In the **Type** section, define the database as a bibliographic database by selecting the **Bibliographic** radio button.

9. Select the **Public Use** check box if you want this database to be available to all users.

    If the **Public Use** check box is checked, the **Access Control** tab does not display. If you do not select the **Public Use** check box, you must select access groups to be authorized to access the database on the **Access Control** tab. See <u>Access Control Tab</u> on <u>page 3-13</u> for more information.

⚠ **IMPORTANT:**
*If you do not select the **Public Use** check box and you do not select at
least one access group on the **Access Control** tab, the database is never
available through WebVoyáge.*

10. Select the **Staff Suppress** check box if wanted. That is the database is not available
    when using the **Remote** button in the Catalog or Acquisitions module.

11. Click the **Save** button to save this information, click the **Cancel** return to the work
    space.

    NOTE:
    The **Save** button is not active until IP address information is provided on the
    Definitions tab. If this is a new database the next step is to click the **Definitions**
    tab and configure it. If editing an already defined database the **Save** button is
    active.

    Result: If saved, the **Database** tab is configured.

Definitions Tab

The **Definitions** tab contains the following information for the UB database.

- Remote database server and port information
- Weight of the database
- Maximum connection settings
- License violation action

Figure 3-5. Definitions tab

Table 3-1 details the **Definitions** tab fields.

Table 3-1. Definitions tab fields (Page 1 of 3)

Field	Description	Possible Values	Notes
OPAC section			
Addr:	IP Address of the target server's database, that is the database to which you want to connect.	Valid IP address.	
Port:	Port of the target server's database.	Valid port number.	
Sysadmin			
Addr:	IP Address of the target server's database.	Valid IP address.	
Port:	Port of the target server's database.	Valid port number.	
Circ			
Addr:	IP Address of the target server's database.	Valid IP address.	
Port:	Port of the target server's database.	Valid port number.	

Table 3-1. Definitions tab fields (Page 2 of 3)

Field	Description	Possible Values	Notes
Call slip			
Addr:	IP Address of the target server's database.	Valid IP address.	
Port:	Port of the target server's database.	Valid port number.	
Database Name	Name of the target database, as required by the vendor. **NOTE:** The **Database Name** field is only used for Z39.50 connections. Because you are setting up a Voyager-to-Voyager connection, this field is disabled.		Obtain this information from the database vendor.
User ID	User ID for the target database, as required by the vendor. **NOTE:** The **User ID** field is only used for Z39.50 connections. Because you are setting up a Voyager-to-Voyager connection, this field is disabled.		Obtain this information from the database vendor.
Password	Password for the ID for the target database, as required by the vendor. **NOTE:** The **Password** field is only used for Z39.50 connections. Because you are setting up a Voyager-to-Voyager connection, this field is disabled.		Obtain this information from the database vendor.
Weight	Weight is a priority setting for the particular database when searching multiple databases. If a title comes from multiple databases, the one with the higher weight will be kept while the lesser is merged out.	0-500 Higher number= higher priority Default=100	Access to the lower priority record's holdings is still made available.

Table 3-1.   Definitions tab fields (Page 3 of 3)

Field	Description	Possible Values	Notes
Hook to Holdings	Indicate which Hook to Holdings profile to use with this database. Use if Citation Server is enabled.	Profiles created in Search> Hook to Holdings.	See the *Voyager System Administration User's Guide.*
Time-out	Amount of time Voyager will wait to connect to the database before quitting and producing an error message.		
Maximum Hits	Maximum number of titles to be retrieved during a search.	1-5000	
Maximum number of connections	Maximum number of concurrent connections allowed to the database.	0 to 9999 Determine this number based on your license provisions.	Use for general connection restrictions. Use Maximum staff connections and Maximum public connections to restrict more specifically.
Maximum staff connections	Maximum number of concurrent staff connections allowed to the database.	0 to 9999 Determine this number based on your license provisions.	Use in conjunction with Maximum public connections.
Maximum public connections	Maximum number of concurrent public (non-staff) connections allowed to the database.	0 to 9999 Determine this number based on your license provisions.	Use in conjunction with Maximum staff connections.
License violation action	Establish what Voyager does when maximum number of connections is exceeded.	Block= Prevents patron from connecting to database. Log= Allows patron to connect to database, logging the offending connection(s) to a log file.	The log file in which each license violation is recorded is: `/m1/voyager/xxxdb/log/log.voyager.`

Procedure 3-2. Configuring the Definitions tab

Use the following to configure the **Definitions** tab.

1. From the **Search - Database Definitions** work space select the **Definitions** tab.

   Result: The **Definitions** tab opens (see Figure 3-6).

Figure 3-6. Definitions tab

⚠️ **IMPORTANT:**
In order for the UB databases to communicate with one another, to access patron and circulation policy information, and to send charge, request, and routing information, you must specify the IP address and port information for the OPAC, System Administration, Circulation, and Call Slip modules of each database.

2. Enter the IP address of the target library's server where the database resides in the **Addr** field for each module.

3. Enter the port information for each module in the **Port** field (see Table 3-2).

Table 3-2. **Voyager server port series'**

Voyager server	Ending port series
Opac	XX00
Circulation	XX30
Sysadmin	XX50
Call slip	XX80

In the list above, the XX indicates the port prefix, typically 70 for a production database. However, if there are multiple databases located on one server, the prefixes might vary. The port suffixes for each of the modules listed are the same for all databases. These are the same port numbers that are defined for each module in the voyager.ini file.

4. Enter a database weight in the **Weight** field.

5. Enter the maximum number of titles to be retrieved during a search in the **Maximum Hits** field.

6. Complete the **Maximum number of connections**, **Maximum staff connections**, and **Maximum public connections** fields to govern connections to the UB database.

To...	Do This...
prevent or monitor excess connections on a general basis	Enter the maximum number of connections that your institution is licensed to offer in the **Maximum number of connections** field. Depending on what you select as your license violation action, any connection exceeding the number entered here will either be blocked or recorded in a log file. For example, if you enter ten as your maximum number of connections, and choose block as your license violation action, any connection over this limit will be blocked. **NOTE:** The limit in this field will be ignored if any number higher than zero is entered in the **Maximum staff connections** or **Maximum public connections** fields.

To...	Do This...
prevent or monitor excess connections to the database on a specific staff/public basis	Enter the maximum number of staff connections in the **Maximum staff connections** field
	Enter the maximum number of public connections in the **Maximum public connections** field
	These two numbers should add up to the total number of concurrent connections your institution is licensed to offer.
	You should enter zero in both of these fields if there are no restrictions on the number of connections your institution can have to the database, or if you want to prevent or monitor excess connections on a general basis.
	If your institution is obligated to not exceed ten concurrent connections to the database, it would be useful to set the limit on public connections to five in order to assure that five staff connections will be available at all times.

7. The **License violation action** field designates the action that will be taken when the limit for connections to a remote database has been exceeded.

   - Select **Block** from the drop-down menu if you wish to prevent excess connections to the database. In this case, the person attempting to connect will receive a block message and the actual connection to the remote database will not occur.

     Select **Log** from the drop-down menu if you wish to record each connection that exceeds the established limit for the database to a log file on the server. In this case, the actual connection to the remote database will not be prevented. The following is the path and name of the log file in which each license violation is recorded:

     ```
     /m1/voyager/xxxdb/log/log.voyager.
     ```

8. Click the **Save** button to save your information. Click the **Cancel** button to close without saving.

   Result: If saved, the **Definitions** tab is configured.

Access Control Tab

Access groups provide a way for your institution to control access to non-public databases through the **Voyager Connection Options** window in WebVoyáge. On the **Access Control** tab ([Figure 3-7](#)) of the **Search - Database Definitions** work space, you can select access groups to be associated with a non-public database.

The **Access Control** tab displays only if the **Public Use** check box on the **Database** tab has not been checked. Checking the **Public Use** check box specifies that the database is public and available to all users. Therefore if the **Public Use** check box is checked, there is no need for Access Control.
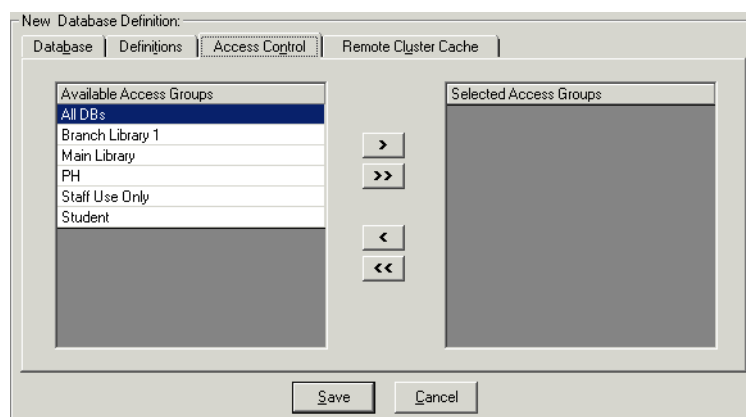
Figure 3-7.   Access Control tab

If a database is not public, access groups must be selected for the system to know who can search the database.

⚠ **IMPORTANT:**
*If you do not select the **Public Use** check box and you do not select at least one access group on the **Access Control** tab, the database is never available through WebVoyáge.*

See the *Voyager System Administration User's Guide* for information on creating the access control groups that populate this tab.

NOTE:
One type of access group controls access to non-public databases by patron group. For this type of access group, the non-public databases that a particular patron is authorized to search will display only after the patron has logged in. However, you can force patrons to login before accessing the **Databases** page in WebVoyáge. See the *Voyager WebVoyáge User's Guide* for more information.

Procedure 3-3. Assigning Access Control Groups

Use the following to assign or reassign Access Control Groups.

1. From the **Search - Database Definitions** work space select the **Access Control** tab.

   Result: The **Access Control** tab displays with the **Available Access Groups** list and the **Selected Access Groups** list (see).

Figure 3-8.   Access Control Groups tab
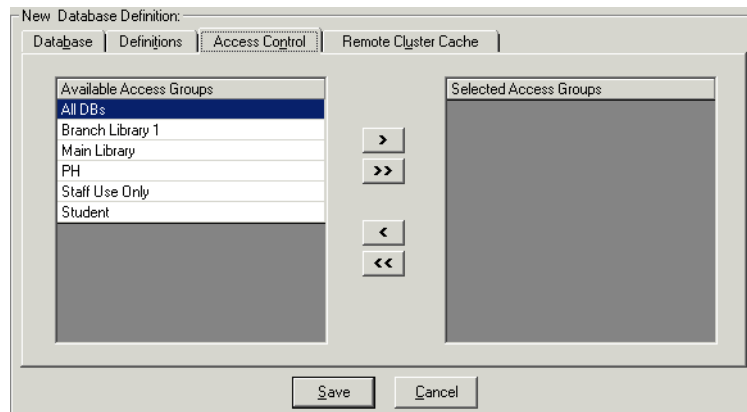
2. To add an access group, highlight the group in the **Available Access Groups** list and click the **>** button to add it to the **Selected Access Groups** list.

   Result: The selected group moves from the **Available Access Groups** list to the **Selected Access Groups** list.

   You can add all of the available groups to the **Selected Access Groups** list by clicking the **>>** button.

To remove a group from the **Selected Access Groups** list, highlight the group and click the **<** button. The group moves back to the **Available Access Groups** list.

To remove all groups from the **Selected Access Groups** list, click the **<<** button. All of the selected groups move back to the **Available Access Groups** list.

3. Click the **Save** button to save your information. Click the **Cancel** button to close without saving.

Result: If saved, the Access Control groups are assigned.

Remote Cluster Cache Tab

Voyager updates cluster and patron information for the clusters in remote databases when you refresh the remote cluster cache.

NOTE:
Be sure to refresh your remote cluster cache with your remote cluster libraries' schedules in mind, as refreshing the cache connects to their databases and retrieves the information.

Procedure 3-4. Updating the Remote Cluster Cache

Use the following to update the Remote Cluster Cache.

1. From the **Search - Database Definitions** work space select the **Remote Cluster Cache** tab.

Result: The **Remote Cluster Cache** tab displays (see <u>Figure 3-9</u>).
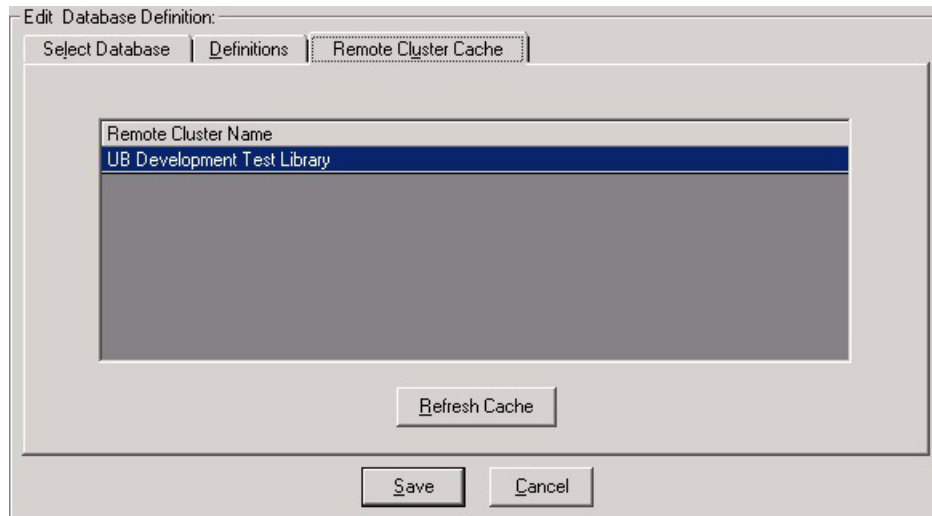
Figure 3-9.   Remote Cluster Cache tab

2. Click the **Refresh Cache** button.

    Result: The cache is updated. Any changes to the remote clusters are reflected in the Remote Cluster Name list.

3. Clicking the **Save** button, saves the information on the other tabs of the **Edit Database Definition** section.

    See Update Remote Circulation Cluster Cache (Circjob 33) on page 8-18, this discusses a circulation batch job for updating the remote cluster cache.

Circulation Configuration

4

Introduction

The configuration for Circulation in the System Administration module includes:

- Defining UB-specific patron groups and adding them to circulation policy groups and matrices (not required)

  Defining new patron groups to be used only for UB allows libraries more control over UB circulation transactions.

- Patron Group Mapping

  Patron Group Mapping defines which patron groups from another (remote) Circulation Cluster will be mapped into your active (local) Circulation Cluster. For example, faculty patrons at another library might be mapped into the staff patron group at your library.

- Universal Borrowing Policy Definitions

  UB Policy Definitions govern what the patrons in your Circulation Cluster are allowed to do in other Circulation Clusters. They apply separate UB limits for your local patrons when they request or charge remote items. That is, the UB policies tell your database how to handle your patrons who have submitted a UB Request for, or charge an item in a library other than your own.

- Allowing a UB Request when the Holding cluster is also the Pickup cluster (not required)

  If wanted libraries can allow UB Requests when the item's cluster and the Pickup cluster are the same.

Security

Depending on your security profile, you may or may not access the various Circulation work spaces in the System Administration module. Operators that have the **Circulation Policy Groups** check box checked on the **Profile Values** tab in the **Security - Master Profiles** work space in the System Administration have access to those work spaces (see Figure 4-1).
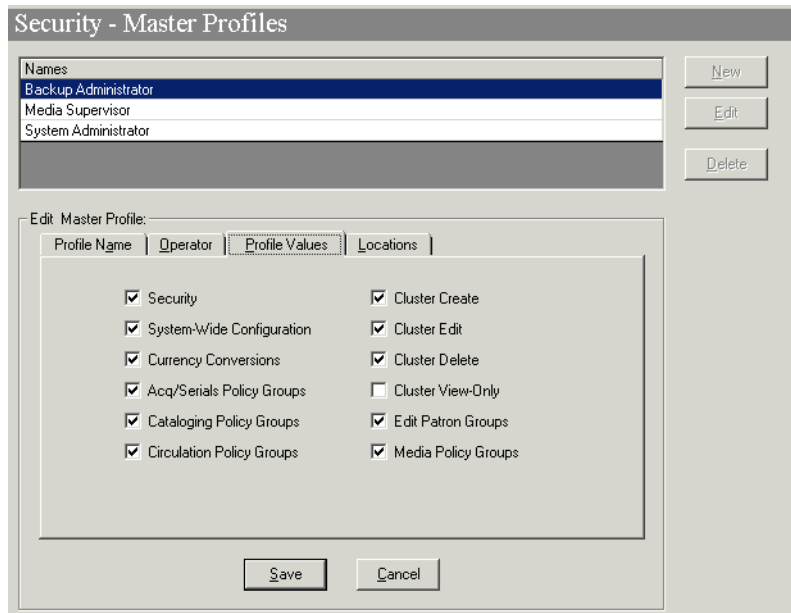
Figure 4-1. Circulation Policy Groups Check Box

These work spaces allow the operator to make the circulation related configurations. Therefore, when checked associated operators can configure:

- Patron Groups
- Circulation Policy Groups and Matrices
- Patron Group Mapping
- UB Policy Definitions
- UB pickup from the Holding library

Additionally, if the **Edit Patron Groups** check box is checked operators associated with this profile are able to add/edit patron groups.

See Master Security Profiles in the *Voyager System Administration User's Guide* for more information.

Operators are able to edit stub patron records if the **Edit Stub Patrons** check box is checked on the **Profiles** tab in the **Security - Circulation Profiles** work space.

They are able to manually map and remap patron groups if the **Manually Map Remote Patrons** check box on that tab is checked.

If the **Reset Patron Record Counters** check box is checked, operators can manually reduce the counters in the patron record. (see).

Figure 4-2.   Profiles Tab, Security - Circulation Profiles

See the *Voyager System Administration User's Guide* for more information.

UB Patron Groups and Circulation Policy Groups

Because Patron Groups are one factor that determines circulation privileges, creating separate Universal Borrowing patron groups in your database is an option. When associating these groups with unique circulation policy and matrix settings exclusively for Universal Borrowing one can:

- set higher fees for lost or overdue items
- charge fines for lost items but not for overdue items
- create patron blocks which are lower for remote patron groups than for your local patron groups
- create a circulation matrix for the remote group that would limit UB Requests to specific item types and allow you to specify exclusive loan policies for UB transactions

NOTE:
This is not a requirement for Universal Borrowing, remote patron groups can follow circulation polices and matrices already established for your local patron groups.

If you decide to create unique a Universal Borrowing patron group(s), you must add the new patron group to a (current or new) Circulation Policy Group(s), and define patron blocks and matrices for the group.

Circulation Policy Definitions and Circulation Matrix Settings

If you created UB patron groups in the System Administration module, you must add those patron groups to a Circulation Policy Group. This can be either a current group or you can create a new group(s).

You must also define the circulation matrices that determine patron block levels and loan policies for all the various combinations of Patron Groups and Item Types when an item presented for circulation belongs to a location in the Group.

Once the UB patron group has been associated with a circulation policy group and matrix, the next step is to map remote patron groups to the UB patron group. When the mapping is complete, any remote patron who wishes to borrow an item from your library is governed by the policies and matrices defined for the UB patron group.

☞ **TIP:**
When you are defining a circulation matrix for a UB patron group, you can determine values with regards to Universal Borrowing, in the context of the following: A remote patron group mapped to my UB patron group wants to borrow an item of the Item Type from one of my locations that belongs to the Circulation Policy Group. What policies should apply?

These activities are completed in the **Circulation - Patron Groups** work space, and **Circulation - Policy Definitions** work space in the System Administration. See the *Voyager System Administration User's Guide* for information on how to do this.

NOTE:
Add new UB patron groups to a circulation policy and create matrices in the same manner as you added your local patron groups. Nothing in circulation policies or matrices has been changed to accommodate Universal Borrowing.

Patron Group Mapping

For a circulation transaction to occur, the charging patron's patron record and the wanted item's item record must reside in the same Circulation Cluster. For circulation transactions between different Voyager databases, and therefore, different Circulation Clusters, the charging patron must be mapped to a patron group in the item's cluster, and a stub patron record must be created.

In the System Administration module, Patron Group Mapping defines which patron groups from another (remote) Circulation Cluster will be mapped into your active (local) Circulation Cluster. The active Circulation Cluster is the one selected in System Administration.

For every patron group administrators determine the type of mapping to occur. There are three choices for patron group mapping.

- A patron group in a remote Circulation Cluster may be automatically mapped to a patron group in the local cluster. With automatic mapping, Voyager creates a new patron record (stub) in the local cluster whenever a patron in a remote Circulation Cluster begins a circulation transaction.

- A patron group in a remote Circulation Cluster may require manual mapping to the local Circulation Cluster. With manual mapping, the circulation operator must assign the patron a patron group before the transaction can continue. The circulation operator can also control the expiration and purge dates as part of the mapping process.

⚠ IMPORTANT:
Manually mapped patrons are not able to place UB Requests until they have a stub record in the database where the item they want to request resides.

- All unmapped patron groups in a remote cluster can be mapped to a specific local patron group, or all unmapped patron groups can be manually mapped, the ALL OTHERS option.

⚠ IMPORTANT:
If a remote patron group has no mapping, then patrons in that group cannot be mapped into the local (destination) cluster at all, and therefore, they have no circulation privileges for items in the local cluster.

Patron Group Mapping is always in terms of a remote cluster (either a Circulation Cluster in a different database or a different Circulation Cluster in the same database) containing the patron record, to the local Circulation Cluster containing the item.

Since Patron Groups can be mapped automatically or manually, if a patron is associated with patron groups that are both automatically and manually mapped, the patron is mapped automatically.

If more than one patron barcode maps to the same local patron group the system will ensure that only one barcode will remain active in the stub record, the status of those other barcodes is changed to Other.

When circulation transactions take place between a patron in one Circulation Cluster and items in several other Circulation Clusters in remote clusters, a stub patron record is created once in each Circulation Cluster, even if those clusters reside in the same database.

NOTE:
It is possible, if a database has multiple clusters, that there could be multiple stub patron records within the database. However, a single Circulation Cluster only contains one stub patron record for any remote patron.

Also, if the pickup location belongs to a Circulation Cluster other than the item or patron, a stub patron record will be created in that cluster, with a UB hold entry applied.

Each stub patron record will maintain circulation transactions for items within its cluster.

Whenever a subsequent circulation transaction takes place, the existing stub patron records are updated against their parent record. If the records have been purged a new stub patron record is created.

Once a patron is mapped and their stub patron record created, they use the same stub patron record to request and charge items until it is purged from the database.

Circulation - Patron Group Mapping Work Space

In the **Circulation - Patron Group Mapping** work space administrators match the patron groups from the remote database to the local patron groups.

Mapping to your patron groups determines the circulation policies and matrices that are applied to any remote patron who wants to charge an item which lives in your library, that is, you are the Holding library (see).
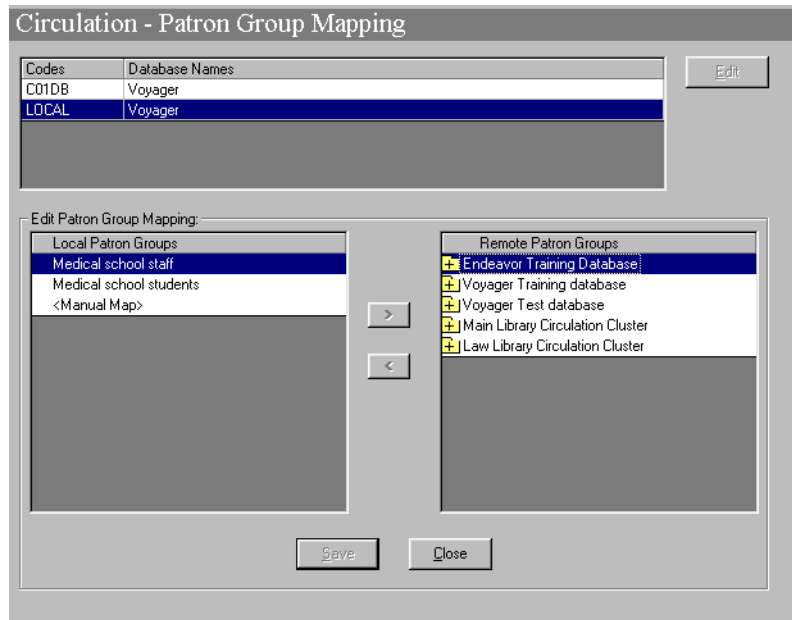
Figure 4-3.   Circulation - Patron Group Mapping Work Space

Table 4-1 provides names, descriptions, locations, if required, and type and range requirements for the fields in the **Circulation - Patron Group Mapping** work space.

Table 4-1.   Circulation - Patron Group Mapping Work Space

Name	Description	Required	Type and Range
Codes	These are the codes for each database.	The LOCAL database will be listed and any other Universal Borrowing databases.	Populated by databases defined in the System Administration module. See Search - Database Definitions work space on page 3-2.
Database Names	Name of each database, includes the local database and any remote databases.	The LOCAL database will be listed and any other Universal Borrowing databases.	Populated by databases defined in the System Administration module.

Table 4-1.   Circulation - Patron Group Mapping Work Space

Name	Description	Required	Type and Range
Local Patron Groups	Patron Groups in the active Circulation Cluster. This includes <Manual Map>. Manual Mapping allows sites more control over the mapping process. In this case, a circulation operator must intervene to create the stub record before the transaction can continue.	Yes.	Populated by Patron Groups defined in the Circulation Cluster.
Remote Patron Groups	Patron Groups in all of the destination Circulation Clusters, including those in the same database, and remote databases. This includes ALL OTHERS. ALL OTHERS mapping is useful if Patron Groups are added to the remote cluster. Therefore, they will be mapped and transactions can occur.	Yes.	Populated by Patron Groups defined in the remote Circulation Cluster.

Procedure 4-1.   Mapping Patron Groups- Automatic Mapping

Use the following to define automatic patron group mapping.

1. Access the **Circulation - Patron Group Mapping** work space.

    a. Click **Circulation** in the listbar.

    b. Click the **Patron Groups Mapping** button in the Circulation task bar.

    c. Select the Circulation Cluster (if necessary).

Result: The **Circulation - Patron Group Mapping** work space opens with all available databases in the list (see Figure 4-4).

Remote databases only appear on this screen if they have been designated as UB databases on the **Database** tab of **Search - Database Definitions** work space in the Voyager System Administration module.

In Figure 4-4, there are two databases, one local and one remote database (a UB enabled database) listed.
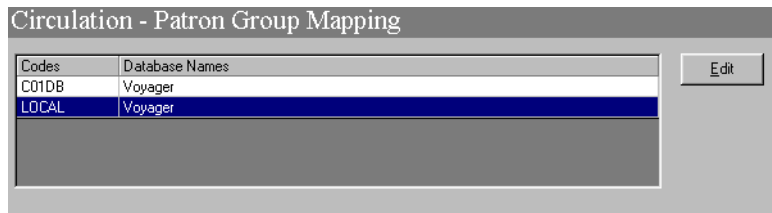
Figure 4-4.   Circulation - Patron Group Mapping Work Space Top Section

2. Click the **Edit** button.

    Result: The bottom half of the work space, the **Edit Patron Group Mapping**
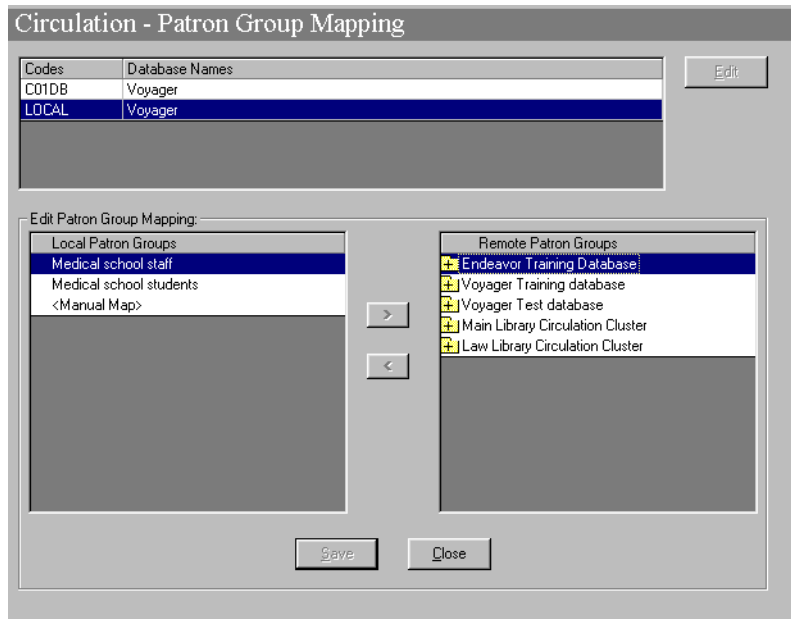   section opens (see Figure 4-5).

Figure 4-5.   Edit Patron Group Mapping Section

NOTE:
To view all patron groups in a remote database, click the **+** button next to the
database's description. To hide all patron groups in the database, click the **-**
button.

3. Select the remote cluster whose Patron Groups you want to map to the Patron Groups in the local cluster and click the **+** next to the name in the **Remote Patron Groups** list to display all of the patron groups (see Figure 4-6).
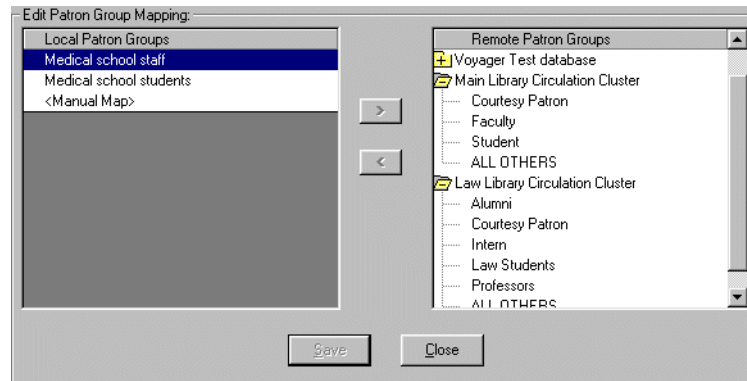

Figure 4-6.   Remote Patron Groups Available for Mapping

NOTE:
Voyager uses the database name in the **Remote Patron Groups** column from the Cluster Name of the remote cluster being connected to. This is configured in the remote database in Voyager **System Administration**> **Circulation - Cluster Maintenance** work space. See the *Voyager Circulation Clusters User's Guide* for more information.

4. To set up automatic mapping for a remote patron group to a local patron group,

    a. Select the Local Patron Group from the **Local Patron Groups** list on the left, this is the group into which you will map the remote patron group.

    b. Select the remote patron group from the **Remote Patron Groups** list on the right, this is the group you want to map to the local group.
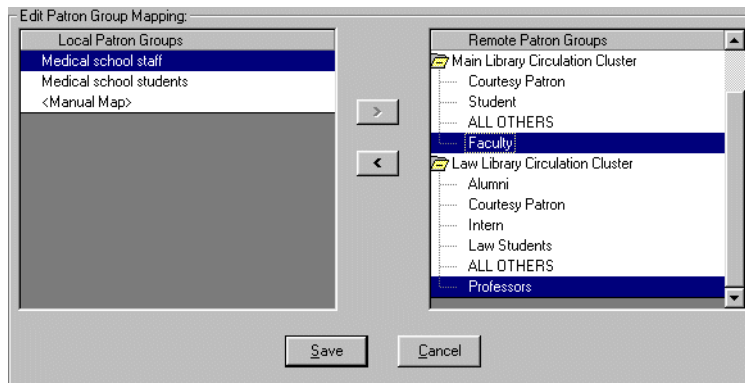
    c. Click the **<** button.

Figure 4-7.   Mapping the Remote Patron Groups

In the example shown in , the remote patron groups of Faculty and Professor are mapped into the Medical school staff patron group.

Result: The remote patron groups are mapped to the local patron group. Notice that displayed under the local Patron Group is the newly-mapped remote patron group and its corresponding Circulation Cluster (see).
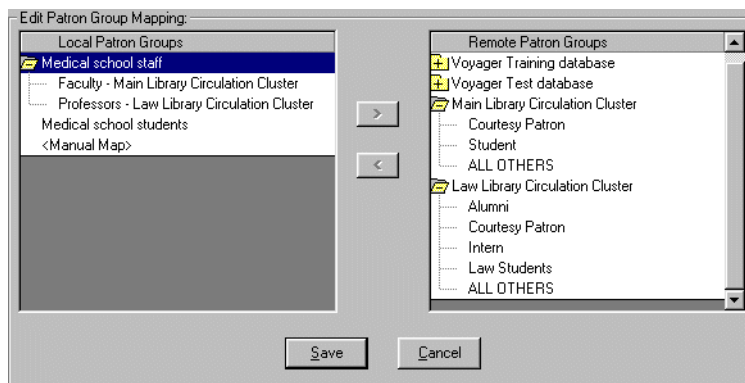

Figure 4-8.   Local Patron Group with Mapped Remote Patron Groups

5. Click the **Save** button if you want to save the mappings, click **Cancel** if you do not want to keep the mappings.

Result: If saved, defining automatic mapping of patron groups is completed.

Procedure 4-2. Mapping Patron Groups- Manual Mapping

Use the following to define manual patron group mapping.

1. Access the **Edit Patron Group Mapping** section of the **Circulation - Patron Group Mapping** work space, use steps one through five of Procedure 4-1, Mapping Patron Groups- Automatic Mapping, on page 4-9.

2. To set up manual mapping for a remote patron group to a local patron group,

   a. Select <Manual Map> from the **Local Patron Groups** list on the left.

   b. Select the remote patron group from the **Remote Patron Groups** list on the right.
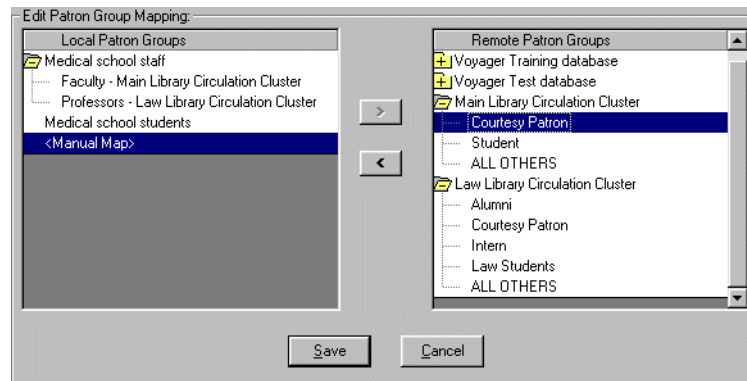
   c. Click the **<** button.

Figure 4-9.   Remote Patron Group to be Manually Mapped

In the example shown in Figure 4-9, the remote patron group Courtesy Patron of the Main Library Circulation Cluster is manually mapped in the Medical school Circulation Cluster.

Result: The remote patron group is set to be manually mapped. Therefore, when a patron from that remote patron group wants to charge an item, a circulation operator must intervene by manually mapping this patron before circulation activity can take place. Notice that displayed under the **Local Patron Groups** list

is the Manual Map section with this newly-mapped remote patron group of Courtesy Patron and its corresponding Circulation Cluster listed (see Figure 4-10).
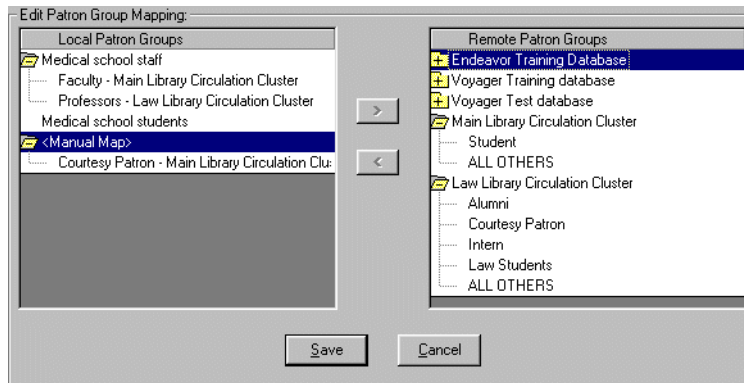

Figure 4-10. **Manually Mapped Remote Patron Group**

3. Click the **Save** button if you want to save the mappings, click **Cancel** if you do not want to keep the mappings.

   Result: If saved, defining manual mapping of patron groups is completed.

Procedure 4-3. Mapping Patron Groups- All Others Mapping

Use the following to define ALL OTHERS patron group mapping.

1. Access the **Edit Patron Group Mapping** section of the **Circulation - Patron Group Mapping** work space, use steps one through five of Procedure 4-1, Mapping Patron Groups- Automatic Mapping, on page 4-9.

2. To set up the ALL OTHERS mapping, for all other remote patron groups,

   a. Select the local patron group, or <Manual Map>, from the **Local Patron Groups** list on the left.

   b. Select ALL OTHERS from the **Remote Patron Groups** list on the right.
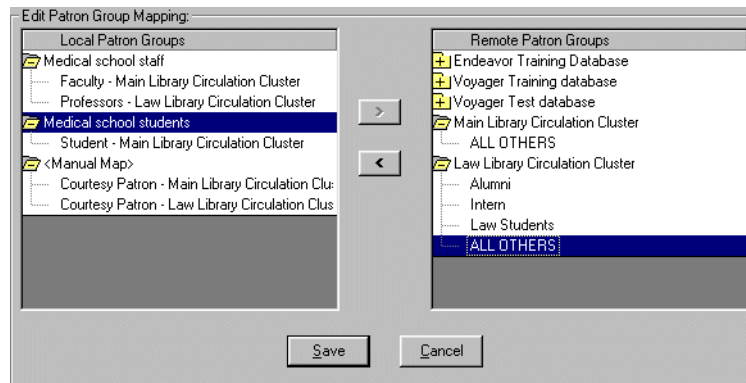
   c. Click the **<** button.

Figure 4-11.   Mapping the All Others Remote Patron Group to the Local

In the example shown in Figure 4-11, the ALL OTHERS remote patron group is mapped to the local patron group Medical school students.

Any remote patron groups from the Law Library Circulation Cluster not already automatically, or manually mapped, will be mapped to the local patron group that was selected (Figure 4-12) Medical school students.
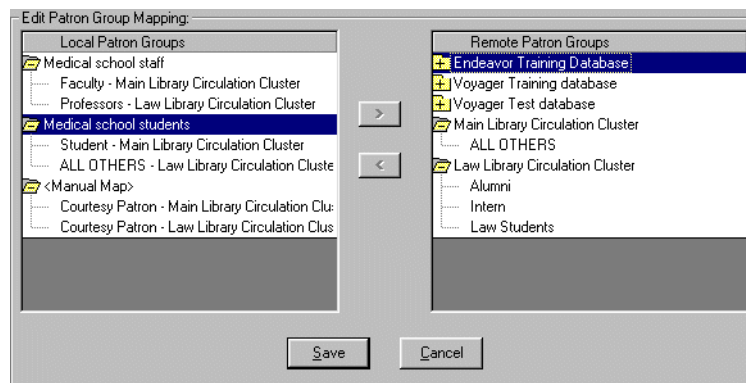

Figure 4-12.   All Others Patron Group Mapping

NOTE:
When new Patron Groups are created in the Law Library Circulation Cluster, they will be mapped as ALL OTHERS because they have no explicit mapping.

3. Click the **Save** button if you want to save the mappings, click **Cancel** if you do not want to keep the mappings.

   Result: If saved, defining ALL OTHERS mapping of patron groups is completed.

Editing Patron Group Mappings

You can edit the Patron Group Mappings at any time. When you access the **Patron Group Mapping** work space all current mappings display.

To edit the mappings you remove the current mapping and either mapping it to a different patron group in the local Circulation Cluster or do not map it at all.

⚠ **IMPORTANT:**
If patron group mapping is altered, it will not affect current circulation transactions. However, if a current item is renewed the new patron group's policies will be applied.

Procedure 4-4. Editing Patron Group Mappings

Use the following to edit Patron Group Mappings.

1. Access the **Circulation - Patron Group Mapping** work space.

   a. Click **Circulation** in the listbar.

   b. Click the **Patron Groups Mapping** button in the Circulation task bar.

   c. Select the Circulation Cluster (if necessary).

   Result: The **Circulation - Patron Group Mapping** work space opens with all available Circulation Clusters in the list.

2. Click the **Edit** button.

   Result: The bottom half of the work space, the **Edit Patron Group Mapping** section opens.

3. To remove a mapped patron group highlight it and click the **>** button to remove it (see Figure 4-13).
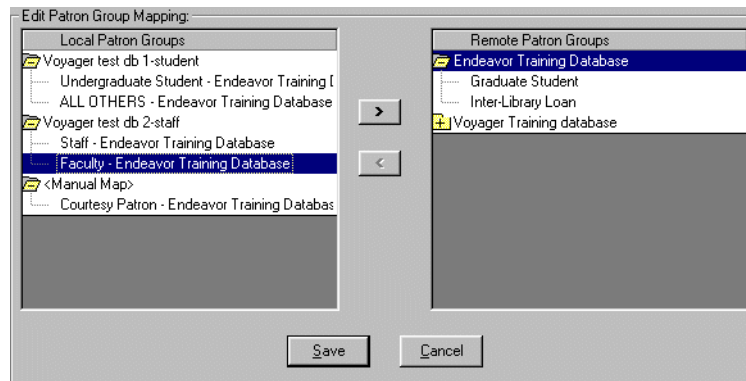
Figure 4-13.   Removing a Mapped Patron Group

Result: This places the remote patron group back in the **Remote Patron Groups**
list. In the example, the remote Faculty patron group will be moved from the local
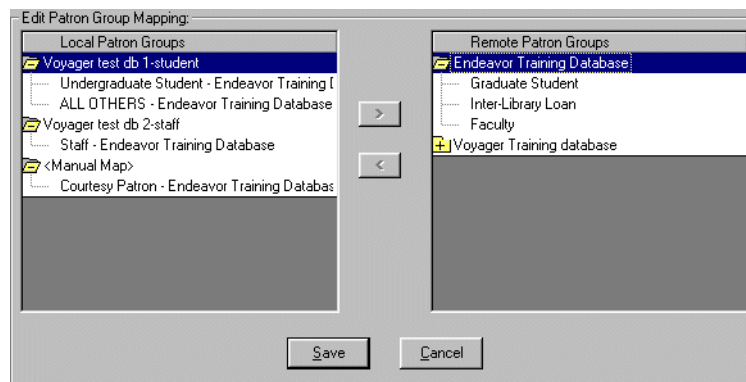staff patron group (see Figure 4-14).

**Figure 4-14.   Patron Group Removed from the Local Patron Group Section and
                Placed in the Remote Patron Group Section**

4. You can now map that remote patron group into a different local patron group, or
    <Manual Map> if you want.

Stub and Child Patron Records

When a patron makes a request for an item at a database (cluster) other than his or her home database (cluster), a stub patron record is created on that database (in that cluster).

Stub Patron Record

This stub patron record contains basic patron information, id, name, current active addresses, barcode associated with the transaction and their patron group. Additionally, these records retain a link to their parent record.

NOTE:
The patron PIN is not be mapped.

Child Patron Record

A child patron record is a stub patron record that is has been edited by a circulation operator such that it is different from it's parent patron record.

If circulation operators edit information in the stub patron record, the changed information is protected from update by changes in the parent patron record. This protection operates field-by-field, so if a single address is added to a child patron record, that address will be protected but addresses of other address types will still be updated in response to changes in the parent patron record. That is, anything *changed* in the child record will not be overwritten by a change in the patron record on the home database (the *parent* record). Everything left unchanged in the child record will be updated when the parent record changes.

Child patron records can have independent addresses, phone numbers, expiration dates and purge dates. The Institution ID, SSN and name information will always be replicated from the parent patron record. Patron group information is also replicated from the parent record, but operators can remap manually mapped patron groups.

NOTE:
Changes in a stub patron record do not affect the parent patron record.

Identifying a Stub or Child Patron Record

Stub and child patron records have in their title bars the words UB Patron as well as show their home Circulation Cluster (see).
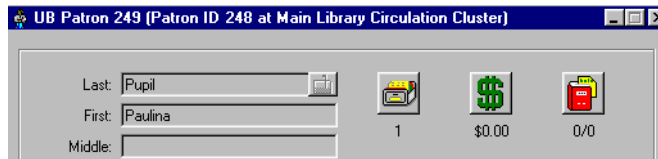
Figure 4-15.   Stub Record Title Bar

Also, on the **Patron ID** tab of the record, the Operator ID is SYS-UB (see Figure 4-16). The exception is when the patron was manually mapped, in this case the operator ID is the operator who performed the mapping.

Figure 4-16.   Stub Record Patron ID Tab with SYS-UB as the Operator

Counters

Universal Borrowing transactions are only counted and recorded at the Home library in the local patron record. As long as you have an active stub patron record in your database, regular transactions are recorded on the **Counters** tab. Regular transactions increment the Current Call Slips, Historical Call Slips, Historical Charges, Claims Returned, Lost Items, and Self-Shelved counters. Once you run Circjob 29 to delete stub patron record, the information from the **Counters** tab is also deleted. See Counters Tab of the Patron Record on page 4-40.

Address

A stub patron record pulls one mail address and one e-mail address. The e-mail address must be active to be pulled. If a patron has both a permanent address and an active temporary address, the system pulls the active temporary address. If the temporary address is not active, the permanent address is pulled.

If the patron address has changed and an e-mail address no longer exists, when the address is updated the system deletes the old e-mail information. When the addresses of a stub patron record are updated, information is deleted rather than overlaid. If the information was overlaid, the old e-mail information would remain in the record.

Editing a Stub Patron Record

Once a stub patron record is created, that is, after a patron is mapped and a circulation transaction has occurred, the stub patron record can be edited. Once a stub patron record is edited it is referred to as a child patron record.

The following fields can be edited. Operators can add or change, but not delete this information (except where noted).

- All address types and their associated phone numbers, including the effective and expire dates
- The expiration date of the stub patron record
- The purge date of the stub patron record
- Patron statistical categories (These are from the item's Circulation Cluster. These can be deleted.)
- UB Notes (These are in the stub patron record only and can be deleted.)
- Existing barcodes can be made inactive

The following fields are protected, they cannot be changed or deleted.

- The Institution ID
- The Social Security Number
- All name information, and name type

⚠ IMPORTANT:
For existing barcodes, operators may not change the patron group, or the barcode text/numbers. Also, they may not delete barcodes or add new barcodes since those would not link to the parent record.

You can add a Universal Borrowing note to a stub patron record. This is the only type of note available. The UB note only exists in your database and is deleted when Circjob 29 is run. See the *Voyager Circulation User's Guide* to the procedure to add a note to a patron record.

If an operator attempts to delete a stub record address they receive the message `You cannot delete Child patron record addresses. Check Hold Mail to stop this address from being used for mail.`

The **Hold Mail** check box instructs the system not to use the address for mailing purposes. See the *Voyager Circulation User's Guide* for more information.

Any time an operator edits a stub record the information on the record's **History** tab is updated with the date, operator who made the update, and desk where the update occurred.

Procedure 4-5. Editing a Stub Patron Record

Use the following to edit a stub patron record.

1. Access the stub patron record (see Figure 4-17). Note that the title bar reads: `UB Patron 216(Patron ID 209 at Main Library Circulation Cluster)`.

Figure 4-17.   Stub Patron Record Display

2. Choose the Edit Patron command from either the **Patron menu> Edit Patron**, or place the cursor in the patron record and right-click the mouse to bring up the menu, then select **Edit Patron**.

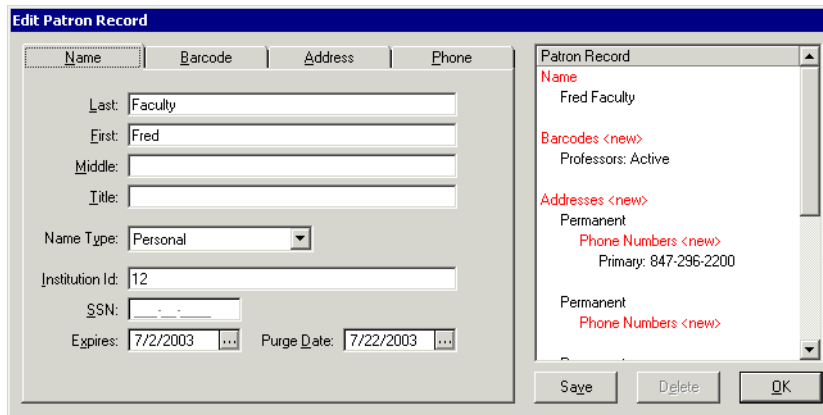   Result: The **Edit Patron Record** dialog box opens (see Figure 4-18).

Figure 4-18.   Edit Patron Dialog Box

3. Select the tab that contains the data you want to edit. For example, click the **Phone** tab.

   Result: The **Phone** tab opens (see Figure 4-19).
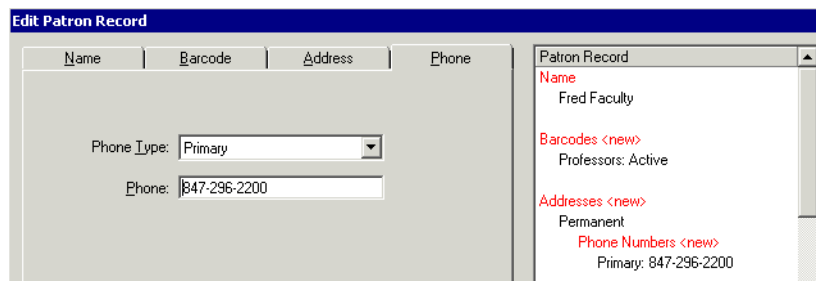

Figure 4-19.   Phone Tab of Stub Patron Record

4. To edit the field, place the cursor in the appropriate field and make the changes necessary, then click the **Save** button. In this example the phone number changed from Area Code 847 to Area Code 312.

   Result: The phone number changes immediately (see Figure 4-20).

Figure 4-20.   Phone Number Edited on the Phone Tab

5. Click the **OK** button.

    Result: The system returns to the patron record.

6. Click the **Address/Phone** tab of the patron record to see the changes (see Figure 4-21).

Figure 4-21.   Stub Patron Record after Edits

Result: The stub record is edited.

Deleting a Stub Patron Record

There is no way to manually delete a stub or child patron record within the Circulation module. You must run Circulation Batch job 29 to purge stub (or child) patron records. See Purge Universal Borrowing (UB) Patron Stub Records (Circjob 29) on page 8-4.

Universal Borrowing Policy Definitions

UB Policy Definitions must be configured to do Universal Borrowing (inter-cluster) circulation transactions.

UB Policy Definitions govern what the patrons in your library (Circulation Cluster) are allowed to do in other libraries (Circulation Clusters). These policies always concern the rules for patrons who belong to the active Circulation Cluster. Whereas, Patron Group Mapping defines what abilities patrons from other Circulation Clusters will have in your Circulation cluster. That is, sites control the circulation activity of their patrons using UB Policy Definitions, and the activity of other patrons using Patron Group Mapping.

The UB Policy Definitions determine which patron groups can perform UB transactions by defining which patron groups are UB eligible. Then, if UB eligible, various limits can be specified. The UB limits serve to block your patrons from submitting a UB Request or successfully charging a UB item.

UB policies are aggregate counters, that is, the UB policies count requests, charges, and fines, are totals from all the libraries in the group. For example, if a patron from Aimer has five overdue items at Blake and five overdue items at Cooper and the Maximum Overdue Items is set to ten, then the patron is blocked from any additional UB transactions.

To define the UB Policy Definitions use the **Circulation - UB Policy Definitions** work space (see Figure 4-22).
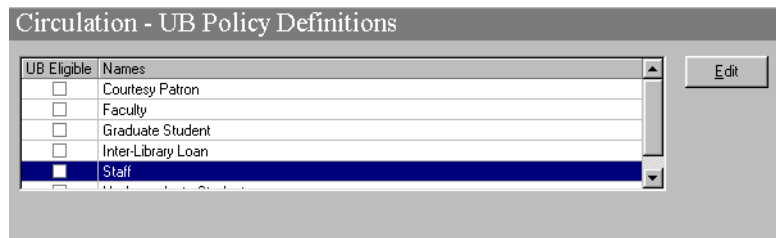
Figure 4-22.   Circulation - UB Policy Definition Work Space

When you access the **Circulation - UB Policy Definitions** work space, the patron groups in the active Circulation Cluster display. The bottom half of the **Circulation - UB Policy Definitions** work space opens after selecting a Patron Group and clicking the **Edit** button.

Figure 4-23 displays the specific settings that can be defined for a Patron Group that is UB Eligible. These settings allow you to specify limits and to apply these limits to local transactions by checking the **Block Local Transactions** checkbox.
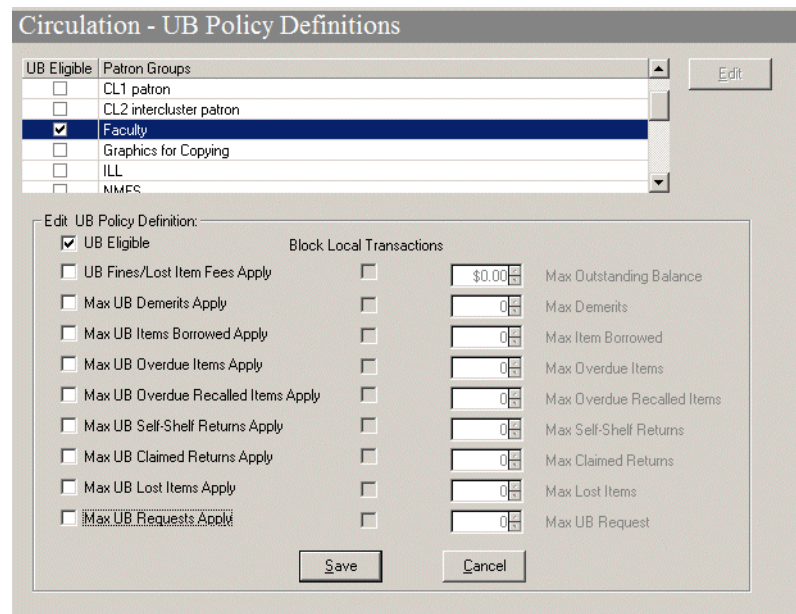

Figure 4-23.   Edit UB Policy Definitions section

Table 4-2 provides names, descriptions, if required, and type and range requirements for the fields and check boxes in the **Circulation - UB Policy Definition** work space, **Edit UB Policy Definition** section.

Table 4-2.   Circulation - UB Policy Definitions Work Space

Name	Description	Required	Type and Range
UB Eligible	When checked, members of this patron group are allowed to do inter-cluster circulation transactions.	No	Check box The default is unchecked.
Block Local Transactions	When checked, the corresponding block applies to local circulation transactions, also.	No	Check box The default is unchecked.
UB Fines/ Lost Items Fees Apply	When checked, patrons are liable for overdue fines/lost item fees for UB items. Leave blank if patrons are exempt from fines/fees.	No	Check box The default is unchecked.
Max[imum] Outstanding Balance	The amount at which the system blocks the use of the patron ID, if the patron has a total amount due (from all UB fines/fees) equal to or greater than this amount.	If UB Fines/Lost Items Fees Apply is checked	00.00 to 9999.99
Max[imum] UB Demerits Apply	When checked, this limits the patron from circulation transactions if the Max Demerits threshold is reached.	No Used if a site assess demerit points instead of monetary fines.	Check box The default is unchecked.
Max[imum] Demerits	The number at which the system will block the use of the Patron ID if the patron has a total number of UB Demerits equal to this number.	Used if Max UB Demerits Apply is checked.	00.00 to 9999.99
Max[imum] UB Items Borrowed Apply	When checked, this limits the total number of UB items charged to the patron at one time.	No	Check box The default is unchecked.
Max[imum] Items Borrowed	The number at which the system will block the use of the Patron ID if the patron has a total number of UB charged items equal to this number.	Used if Max Items Borrowed Apply is checked.	0 to 999 If 0, the system acts as if the related check box does not apply.

Table 4-2.   Circulation - UB Policy Definitions Work Space

Name	Description	Required	Type and Range
Max[imum] UB Overdue Items Apply	When checked, this limits the total number of overdue UB items charged to the patron at one time.	No	Check box The default is unchecked.
Max[imum] Overdue Items	The number at which the system blocks the use of the Patron ID if the patron has a total number of overdue items equal to this number.	Used if Max Overdue Item Apply is checked.	0 to 999 If 0, the system acts as if the related check box does not apply. Must be equal to or less than the Max UB Items Borrowed number.
Max[imum] UB Overdue Recalled Items Apply	When checked, this limits the total number of overdue recalled UB items charged to the patron at one time.	No	Check box The default is unchecked.
Max[imum] Overdue Recalled Items	The number at which the system will block the use of the Patron ID if the patron has a total number of overdue recalled UB items equal to this number.	Used if Max Overdue Recalled Items Apply is checked.	0 to 999 If 0, the system acts as if the related check box does not apply. Must be equal to or less than the Max Items Borrowed value.
Max[imum] UB Self-Shelf Returns Apply	When checked, this limits the number of UB Self-Shelves a patron can accumulate.	No	Check box The default is unchecked.

Table 4-2.   Circulation - UB Policy Definitions Work Space

Name	Description	Required	Type and Range
Max[imum] Self-Shelf Returns	The number at which the system will block the use of the Patron ID if the patron has a total number of UB Self-Shelves (displayed as a counter in the patron record) equal to this number. The system increments the patron's UB self-shelve counter every time an item presented for charge by another patron must first be discharged from the patron. If limit is reached this counter must be decreased manually, see the *Voyager Circulation User's Guide* for more information.	Used if Max Self Shelves Returns Apply is checked.	0 to 999 If 0, the system acts as if the related check box does not apply.
Max[imum] UB Claimed Returns Apply	When checked, this limits the number of UB Claimed Returns a patron can accumulate.	No	Check box The default is unchecked.
Max[imum] Claimed Returns	The number at which the system will block the use of the Patron ID if the patron has a total number of UB Claimed Returns (displayed as a counter in the patron record) equal to this number. When a staff member adds the item status of Claims Returned to a UB item, the system increments this counter by one. If limit is reached this counter must be decreased manually, see the *Voyager Circulation User's Guide* for more information.	Used if Max Claimed Returns Apply is checked.	0 to 999 If 0, the system acts as if the related check box does not apply.
Max[imum] UB Lost Items Apply	When checked, this limits the number of UB lost items the patron can accumulate.	No	Check box The default is unchecked.

Table 4-2.   Circulation - UB Policy Definitions Work Space

Name	Description	Required	Type and Range
Max[imum] Lost Items	The number at which the system blocks the use of a Patron ID if the patron has a total number of UB Lost Items (displayed as a counter in the patron record) equal to this number. When the system processes a lost item of a staff member adds the item status of Lost Item to an item, the system increments the UB lost item counter by one. If limit is reached this counter must be decreased manually, see the *Voyager Circulation User's Guide* for more information.	Used if Max Lost Items Apply is checked.	0 to 999 If 0, the system acts as if the related check box does not apply.
Max[imum] UB Requests Apply	When checked, this limits the number of UB Requests the patron can submit.	No	Check box The default is unchecked.
Max[imum] UB Request	The number at which the system blocks the submission of UB Requests if the patron has a total number of pending UB Requests (displayed as a patron counter) equal to this number. When a UB Request is made, the UB Request counter increments by one. When a UB Request is processed or expired or otherwise assigned a reason for not being processed, the counter decreases by one. **NOTE:** The number of UB Requests a patron submits also counts toward the Max UB Items Borrowed limit. Therefore the number of UB Requests submitted plus the number of UB charged items may not exceed the UB Items Borrowed limit.	Used if Max UB Requests Apply is checked.	0 to 999 If 0, the system acts as if the related check box does not apply. Since this does count toward the Max UB Items Borrowed limit, the number for the Max UB Requests should not exceed the Max Borrowed Items.

Procedure 4-6. Defining the UB Policy Definitions

Use the following to define UB Policies for a specific Patron Group.

1. Access the **Circulation - UB Policy Definitions** work space.

    a. Click **Circulation** in the listbar.

    b. Click the **UB Policy Definitions** button in the Circulation task bar.

    c. Select the Circulation Cluster (if necessary).

    Result: The **Circulation - UB Policy Definitions** work space opens.

2. Select the Patron Group for which you want to specify UB Policy Definitions, and click the **Edit** button.

    Result: The **Edit UB Policy Definition** section opens.

3. Specify the UB Policies for this Patron Group,

    a. Check the **UB Eligible** check box.

    b. Check any of the additional check boxes displayed to select the feature.

    c. Enter numbers in the corresponding fields to provide the specific information.

    Result: Figure 4-24 shows the UB Policy Definitions selected for the Faculty Patron Group.

Figure 4-24.   UB Policy Definition Section with Selections Made

4.   Click the **Save** button to save these settings, click the **Cancel** button to cancel these settings.

Result: If saved, the settings are applied. The system returns to the **Circulation - UB Policy Definitions** work space (see Figure 4-25).

Figure 4-25.   Circulation - UB Policy Definitions Completed for the Faculty Patron Group

NOTE:
There is now a check mark in the check box next to the Faculty Patron Group in the Names listing. When checked, the Patron Group is UB eligible. That is, they are able to do inter-cluster circulation transactions.

Editing UB Policy Definitions

UB Policy definitions may be edited. Any change affects future circulation transactions only.

Procedure 4-7. Editing UB Policy Definitions

Use the following to edit a UB Policy Definitions.

1. Access the **Circulation - UB Policy Definitions** work space.

   a. Click **Circulation** in the listbar.

   b. Click the **UB Policy Definitions** button in the Circulation task bar.

   c. Select the Circulation Cluster (if necessary).

   Result: The **Circulation - UB Policy Definitions** work space opens.

2. Highlight the Patron Group you want to edit and click the **Edit** button.

3. Edit any UB Policies for this Patron Group if wanted.

4. Click the **Save** button to save these edits, click the **Cancel** button to cancel them.

   Result: If saved, the UB Policy Definitions are edited. The system returns to the **Circulation - UB Policy Definitions** work space.

Circulation - Miscellaneous Work Space

The **Circulation - Miscellaneous** work space includes one option that can be configured for Universal Borrowing:

- Allow UB pick-up from Holding library

At the beginning of the user's guide, all the different variations of UB transactions were discussed. Variations in which the Holding library is also the Pickup library are discussed in Holding Cluster is also the Pickup Cluster on page 2-16. For the four variations discussed there, whether or not a UB Request is available to a patron is configured in the **Circulation - Miscellaneous** work space.

Procedure 4-8. Configure the Availability of the UB Request Form when Holding Library is the Pickup Library

Use the following to configure the availability of the UB Request form when the Holding Library is the Pickup library.

1. In the Voyager System Administration module, select **Circulation** from the listbar, and click the **Miscellaneous** button.

   Result: The **Circulation - Miscellaneous** work space displays (see Figure 4-26).

Figure 4-26.   Circulation -- Miscellaneous Dialog Box

2. To allow UB Requests for items that you own, check the **Allow UB Pick-ups from Holding Library** check box.

   NOTE:
   This option is useful for distance learners because it allows patrons to place UB Requests for local items and pick them up at the same library. In other words, the Home library is also the Holding library and the Pickup library.

When you select this check box:

- A local patron can search your database from a remote location (simul-search databases), locate an item that your library owns, and can make a UB Request
- Your library displays in the **Pick Up Library** field and, as a result, all of your Pick-up desks display in the **Pick Up At** field.
- At the circulation desk, a call slip prints out. A staff member retrieves the item and the item is held for the patron at that circulation desk.

3. Click the **Save** button to save your edits. Click the **Cancel** button to close without saving.

   Result: If saved, UB Pick-Ups are allowed from the Holding library.

UB Barcode Lookup Tables

The UB Barcode Lookup Tables feature reduces Circulation client and WebVoyáge workload by automatically determining the cluster to which a patron or item belongs. It does this by comparing the patron or item barcode entered into the Circulation client to unique barcode string portion mappings in barcode lookup tables on the Voyager server.

Each cluster can have item and patron barcode strings associated with them, also contained in the barcodes of all patrons or items in that cluster. Whenever an operator charges or discharges an item containing a patron or item barcode string, Voyager selects the appropriate cluster automatically.

Configuring UB Barcode Lookup Tables consists of the following components:

1. Enabling the UB Barcode Lookup Tables feature.

2. Running the `PgenUBBarcodeConfig` utility to create a partial UB Barcode Lookup Table configuration file.

3. Directing the `voyager.env` file to the UB Barcode Lookup Table configuration file created in 2. This step is only necessary if not using the default PgenUBBarcodeConfig configuration and settings. (See Figure 4-27).

4. Editing the generic UB Barcode Lookup Table configuration file with your consortium's cluster information (see Procedure 4-10, Editing the UB Barcode Lookup Configuration File, on page 4-36).

5. Setting various UB Barcode Lookup Table options (see Procedure 4-10, Editing the UB Barcode Lookup Configuration File, on page 4-36).

6. (Optional) Setting the remaining WebVoyáge-related configuration options (.)

Enabling the UB Barcode Lookup Tables Feature

Enable the UB Barcode Lookup Tables feature by setting the **BriefLogon** variable in the `Options` stanza of the `opac.ini` file (`/m1/voyager/`*xxx*`db/etc/ webovyage/`*webovyage display directory*) to **Y**.

Running The PgenUBBarcodeConfig Utility

The `PgenUBBarcodeConfig` utility (`/m1/voyager/`*xxx*`db/sbin`) creates a generic UB Barcode Lookup Table file to which you must add your consortium's cluster information.

Use the following to create a skeleton UB Barcode Lookup Table file with the PgenUBBarcodeConfig utility:

Procedure 4-9. Creating the UB Barcode Lookup Configuration File

1. Navigate to the `PgenUBBarcodeConfig` file (`/m1/voyager/`*xxx*`db/sbin` by default).

2. Run the PgenUBBarcodeConfig utility.

   Type **`PgenUBBarcodeConfig`** and press **enter**.

   Result: By default, the utility creates the following file:

   - `/m1/voyager/`*xxx*`db/ini/ub_barcode_config.xml`

3. Uncomment the `UB_BARCODE_CONFIG` variable in the *voyager.env* file (`/m1/voyager/`*xxx*`db/ini`) file (see).

   Also make sure the variable contains the correct path to the configuration file previously created, as well as the correct filename.

```
################################################################
         ###########
##       UB Barcode Lookup Configuration (uncomment to enable)


export  UB_BARCODE_CONFIG=$VOYAGER/$DATABASE/ini/
         ub_barcode_config.xml


################################################################
         ##########
```

Figure 4-27.   UB_BARCODE_CONFIG Entry in voyager.env (uncommented)

4. Save the voyager.env file.

5. Edit the ub_barcode_config.xml file. (see).

Procedure 4-10. Editing the UB Barcode Lookup Configuration File

Use the following to edit the ub_barcode_config.xml file after creating it using the PgenUBBarcodeConfig utility:

1. Open the ub_barcode_config.xml file.

2. Set the elements detailed in .

Table 4-3.   Elements of the ub_barcode_config.xml File

Element	Data Source	Notes
TryLocalClusterFirst	None: Institution prefer-ence	When TRUE, Voyager attempts to perform transaction with circ cluster associated with circ desk.

Table 4-3.   Elements of the ub_barcode_config.xml File

Element	Data Source	Notes
UseFirstMatchingPatronCluster	None: Institution preference	When TRUE, When at least one cluster in configuration file contains a pattern matching the barcode entered by the user, Voyager performs a transaction with the first cluster in the config file whose barcode pattern at *Consortium/Cluster/Patron/BarcodePattern* matches the barcode entered by the user.
UseFirstMatching-ItemCluster	None: Institution preference	PgenUBBarcodeConfig sets to FALSE When TRUE, if at least one cluster in the configuration file contains a pattern that matches the barcode entered by the user, Voyager performs a transaction with the first cluster in the config file whose barcode pattern at *Consortium/Cluster/Item/BarcodePattern* matches the barcode entered by the user.
DatabaseName	VOYAGER_DATABASES.DB_NAME	Not used by Voyager. Helps system administrator identify cluster
DatabaseKey	VOYAGER_DATABASES.DB_KEY	Uniquely identifies a database
ClusterName	REMOTE_CIRC_CLUSTER_CACHE.*cluster_name*	Not used by Voyager. Helps system administrator identify cluster
ClusterID	REMOTE_CIRC_CLUSTER_CACHE.REMOTE_CIRC_CLUSTER_ID	Uniquely identifies a cluster within a database.

Table 4-3.   Elements of the ub_barcode_config.xml File

Element	Data Source	Notes
Item:BarcodePattern	Manually supplied by system administrator	PgenUBBarcodeConfig creates two pairs of empty tags for each cluster. **NOTE:** Barcode pattern prefixes should be terminated by a period and an asterisk (. *).
Patron:BarcodePattern	Manually supplied by system administrator	PgenUBBarcodeConfig creates two pairs of empty tags for each cluster. **NOTE:** Barcode pattern prefixes should be terminated by a period and an asterisk (. *). See Figure 4-28.

The file must be updated when any of the following events occur:

- Cluster is added.
- Cluster is deleted.
- UB database is added.
- UB database is deleted.
- Changes to any patron or item barcode pattern.

After the PgenUBBarcodeConfig utility creates the partial file, the system-wide consortium administrator must edit the file. This consists of adding barcode patterns for every cluster within the consortium, which has a uniquely identified barcode pattern. The UB Barcode Lookup Table feature will then use this barcode pattern to automatically determine which cluster a patron or item belongs to.

So for example, if one cluster in a consortium (say State College) uses a patron barcode prefix of 554, that cluster's barcode configuration section would look like Figure 4-28.

```
<Cluster>
                <DatabaseName>State College</DatabaseName>
                <DatabaseKey>ST14567</DatabaseKey>
                <ClusterName>State College</ClusterName>
                <ClusterId>2</ClusterId>
                <Patron>
                        <BarcodePattern>554.*</BarcodePattern>
                </Patron>
</Cluster>
```

Figure 4-28.   Example <Cluster> Element

Now whenever a Circulation operator enters a patron barcode containing **554** into the Voyager Circulation client, Voyager selects the appropriate cluster automatically (in this case, database key ST14567, Cluster ID 2).

Setting the Remaining WebVoyáge-Related Configuration Options

Configure the remaining WebVoyáge display and error components, according to Table 4-4.

Table 4-4.   Additional UB Barcode Lookup Table WebVoyáge Configuration

Component	Variable(s)	Found in
UB Barcode Lookup Table Switch	BriefLogon= • **Y** enables UB Barcode Lookup tables	[Options] stanza of opac.ini file

Table 4-4. Additional UB Barcode Lookup Table WebVoyáge Configuration

Component	Variable(s)	Found in
General Page display options	• Background= • Text= • BGCOLOR= • LINK= • VLINK= • ALINK=	[Brief_Logon_Page] stanza of the opac.ini file
Brief Logon Page Field Labels	• LastName= • SubmitButton= • ResetButton= • PIN= • ID=	

Patron Logon Page Error file	Not Applicable	patronbriefnomatch.htm file (`/m1/voyager/`
		`xxxdb/etc/webvoyage/`
		`webvoyage display`
		`directory`)

Circulation Module Activity Related to UB

In the Circulation module, the stub patron record is visible. Authorized operators may edit the stub patron record. See the *Voyager Circulation User's Guide* for information on editing patron records.

On the **Counters** tab of the patron record the UB Counters are found. This section discusses those UB-related counters.

This section also details the procedure for manually mapping a patron in the Circulation module, .

Counters Tab of the Patron Record

The **Counters** tab in the patron record contains 20 counters (see Figure 4-29). Some of these counters are specifically for Universal Borrowing.

Figure 4-29. **UB Counters on the Counters Tab in a Patron Record**

All of the counters on the **Counters** tab are listed in Table 4-5.

Table 4-5. **Counters in the Patron Record**

Counter Name	Description
Recalls Placed	Number of pending recalls.
Holds Placed	Number of pending holds.
Items Recalled	Number of items charged to the patron for which there is a pending recall request.
Current Call Slips	Number of pending call slip requests.
Current Short Loans	Number of pending short loan requests.
Unclaimed Short Loans	Total number of unclaimed loan requests.
Historical Call Slips	Total number of call slip requests that have been charged and discharged.
Historical Short Loans	Total number of short loan requests that have been charged and discharged
Historical Charges	Total number of items that have been charged and dis-charged.
Historical Distributions	Total number of items distributed to patron.
Claims Returned	Total number of times a patron claims to have returned an item.
Lost Items	Total number of items recorded as lost.

Table 4-5. Counters in the Patron Record

Counter Name	Description
Self-Shelves	Total number of times a patron has apparently self-shelved an item.
UB Charges	Total number of times a patron has charged an item that belongs to a different cluster.
UB Requests	Total number of UB Requests made for items that belong to a different cluster than the patron.
UB Historical Charges	Total number of times an item from a different cluster than the patron is discharged.
UB Historical Requests	Total number of UB Requests processed (either filled or not filled) for an item that belongs to a different cluster than the requesting patron.
UB Claims Returned	Total number of times a patron claims to have returned an item that belongs to a different cluster.
UB Lost Items	Total number of items, that belong to a different cluster, recorded as lost.
UB Self-Shelved	Total number of times a patron has apparently self-shelved an item that belongs to a different cluster.

UB transactions are only counted and recorded at the Home library in the local patron record. As a result, UB counters in a stub patron record are never populated with anything but zero. However, non-UB counters on a stub patron record contain data specific to the cluster in which the stub record resides.

Some of the UB counters are editable from the **Set Patron Counter** dialog box, they are the UB Historical Charges, UB Historical Requests, UB Claims Returned, UB Lost Items, and UB Self-Shelved counters. They are identified on the **Counters** tab with an asterisk following the counter name.

Manually Reducing Patron Counters

In some cases, patron counters will need to be manually reduced or edited to correct a block condition. See the *Voyager Circulation User's Guide* for information on how to manually reduce the counters.

UB Counters

The **Counters** tab includes the following counters for Universal Borrowing:

UB Charges

This is the total number of current UB charges. The counter increments at the time of charge and decrements at the time of first discharge. A patron block is applied when this counter exceeds the Max Items Borrowed limit set in UB Policy Definitions.

UB Requests

This is the total number of current UB Requests. The counter increments at the time of the successful submission of a UB Request and decrements when:

- the item is processed as not filled in Call Slip, or

- the request expires, or

- the item is charged to the requesting patron. A patron block is applied when the counter exceeds the Max UB Requests limit set in UB Policy Definitions.

UB Historical Charges (editable)

This is strictly an informational counter displaying the total historical number of times the patron has charged a UB item. It has no effect on the activities of the patron. The counter increments at the time of first discharge. The counter can be manually reset.

UB Historical Requests (editable)

This is strictly an informational counter displaying the total historical number of UB Requests. It has no effect on the activities of the patron. The counter increments when:

- the request is processed as filled or not filled, or

- the request expires, or

- the item is charged to the requesting patron.

The counter can be manually reset.

UB Claims Returned (editable)

This is the total number of times a patron has claimed to have returned a UB item even though the system does not recognize the item as returned. Typically, when a patron speaks with a circulation operator and claims to have returned an item

that is not accounted for by the system, the circulation operator applies the status of Claims Returned to the item. For Universal Borrowing, the patron must contact the Holding library to initiate the Claims Returned process.

The counter increments by 1 when the Holding library manually changes the item status to Claims Returned.

Once a patron's UB Claims Returned counter has reached the maximum number of claimed returns allowed for that patron's patron group, the system blocks the patron until the UB Claims Returned counter is manually reduced.

NOTE:
This increment is not automatically removed when the Claims Returned status is removed from the item. If it is determined that the patron did indeed return the item, a circulation operator must remove the Claims Returned status from the item and then manually reduce the UB Claims Returned counter by 1.

UB Lost Items (editable)

This is the total number of UB items that have been recorded as lost by the patron. There are two ways a UB item can be recorded as lost:

- the Lost Interval is surpassed and the item status Lost-System applied is applied to the item after running the Circulation batch job 2

- a staff member manually applies the status of Lost to the item.

The counter increments by 1 whenever the status of the item is set to Lost by either method.

Once a patron's UB Lost Items counter has reached the maximum number of lost items allowed for that patron's patron group, the system blocks the patron until the UB Lost Items count is manually reduced.

NOTE:
This increment is not automatically removed when the Lost status is removed from the item, that is, the item has been found or returned. A circulation operator must remove the Lost status from the item and then manually reduce the UB Lost Items counter by 1.

UB Self-Shelved (editable)

This is the total number of times a patron has apparently self-shelved a UB item without turning the item in to be discharged.

If a circulation operator attempts to charge an item to a patron and finds that the item is still charged out to another person, the previous patron's UB Self-Shelved counter increments by 1 when the operator completes the new charge transaction.

Once a patron's UB Self-Shelved counter reaches the maximum number of UB self-shelves allowed for that patron's patron group, the system blocks the patron until the UB Self-Shelved counter is manually reduced.

⚠ **IMPORTANT:**
*Depending on your security profile, you may or may not be allowed to reset patron counters. In **System Administration>
Security> Circulation Profiles** there is a Profile Value for Reset Patron Record Counters. Your operator name must be included in a Circulation Profile with that value selected in order for you to reset patron counters. See the Voyager System Administration User's Guide for more information.*

Manually Mapping Patron Groups in the Circulation Module

If a remote patron's patron group is defined as manually mapped to a local cluster's patron group, a circulation operator must perform the mapping before the patron can make UB Requests in WebVoyáge.
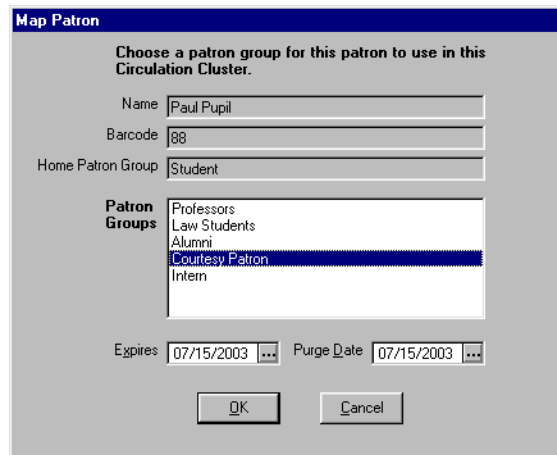
Procedure 4-11. Manually Mapping Patron Groups in the Circulation Module

Use the following to manually map patron groups in the Circulation module.

The **Map Patron** dialog box opens during the course of a circulation transaction when the patron attempting to charge an item does not have a patron record in the item's cluster and the patron's patron group is defined as manually mapped.

1. When the **Map Patron** dialog box opens

   a. Select the Patron Group into which you want to map the patron named in the dialog box. In this example, a student, Paul Pupil, is mapped to the Courtesy Patron patron group in the Law Circulation Cluster.

   b. Enter a date in the **Expires** field if wanted.

   c. Enter a date in the **Purge Date** field if wanted (see Figure 4-30).

Figure 4-30.   Map Patron Dialog Box

2. Click the **OK** button.

    Result: The manual map is complete and the patron stub record has been saved.
    The transaction that was interrupted by mapping the patron continues. Notice that
    in the patron's record the Patron Group listed is the group you just selected (see
).

Figure 4-31.   Transaction Complete after Manually Mapping

⚠️   **IMPORTANT:**
If the circulation operator does not have security privileges to manually map patrons the transaction cannot continue.

See the *Voyager Circulation Clusters User's Guide* for more information on mapping and remapping.

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OPAC Configuration: UB Request Form

5

Introduction

The UB Request form is a system-defined form. This form is only available if your library has Universal Borrowing installed. This form displays in WebVoyáge when a patron wants to place a UB Request. An example of the form is shown in [Figure 5-1](#).

Figure 5-1. Example of the UB_Request form

Security

Depending on your security profile, you may or may not be able to access the **Search - OPAC Configuration** work space. Operators that have the **System-wide** check box checked on the **Profile Values** tab in the **Security - Master Profiles** work space in the System Administration do have access to that work space and can edit the UB Request form (see Figure 5-2).
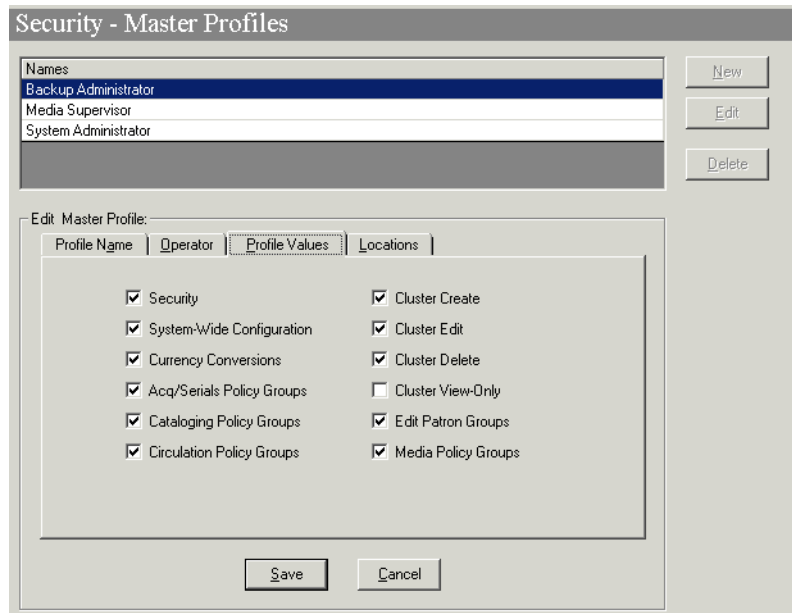
Figure 5-2.   System-wide check box

See Master Security Profiles in the *Voyager System Administration User's Guide* for more information.

OPAC Configuration - Request Forms work space

Authorized operators can edit the UB Request form's name and any instructions for the form in the **OPAC Configuration - Request Forms** work space in the System Administration module (see Figure 5-3). The rest of the information found on that form is drawn from the database and is not editable.

Figure 5-3.   OPAC Configuration - Request Forms work space

The **OPAC Configuration - Request Forms** work space contains two tabs, the
Select Form tab and the **UB Databases** tab.

Select Form tab

The **Select Form** tab is shown in .
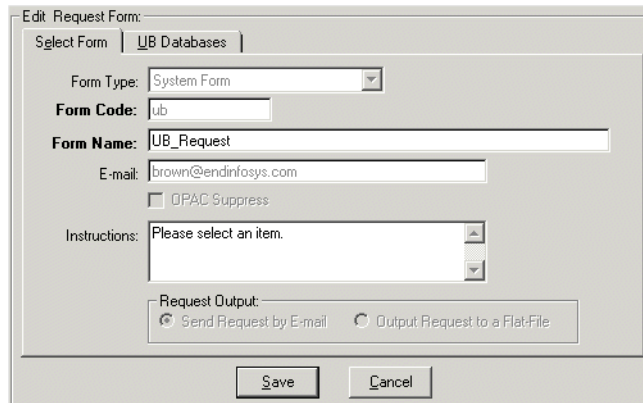
Figure 5-4.   Select Form tab

Table 5-1 describes the **Select Form** tab.

Table 5-1.   Select Form tab

Component	Description
Form Type	The UB Request form is a System Form.
	This field is not editable.
Form Code	The UB Request form is ub.
	This field is not editable.
Form Name	The name of the UB Request form. It displays in WebVoyáge as the a selection choice in the **Type of Request** drop-down list.
	This field is editable. Up to 40 alphanumeric characters are allowed.
E-mail	This field is not applicable to the UB Request form.
OPAC Suppress	This check box not applicable to the UB Request form.
Instructions	Enter any instructional text that you want to display on the form.
	This field is editable. Up to 1000 alphanumeric characters are allowed.
Request Output	This field is not applicable to the UB Request form.

UB Databases tab

The **UB Databases** tab contains the UB eligible databases (all eligible Circulation Clusters in the databases) available for selection. Operators move wanted databases from the **Available Databases** list to the **Selected Databases** list.

When connected to the databases found in the **Selected Databases** list on this tab, the form is available in WebVoyáge.

⚠ **IMPORTANT:**
*If you do not include at least one database in the **Selected Databases** list box, the request form will not be available to anyone.*

Figure 5-5 shows the **UB Databases** tab.
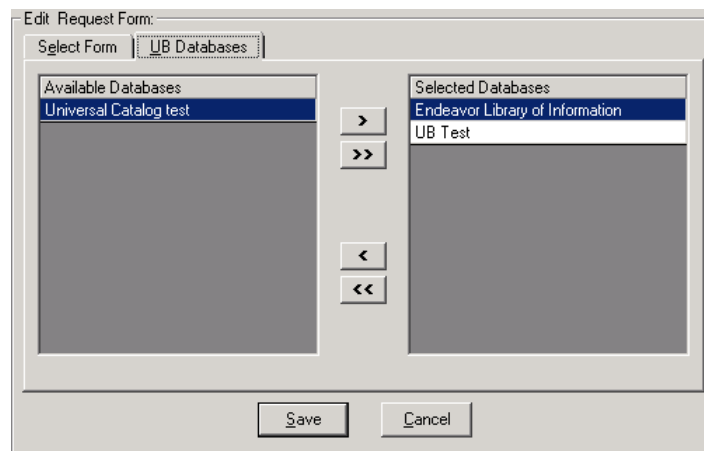
Figure 5-5.   UB Databases tab

Procedure 5-1. Editing the UB Request Form

Use the following to edit the UB Request form.

1. In the Voyager System Administration module, select **OPAC Configuration** from the listbar, and click the **Request Forms** button.

    Result: The **OPAC Configuration - Request Forms** work space opens.

2. Select the UB Request form and click the **Edit** button.

    Result: The **Edit Request Form** section displays, including the **Select Form** and **UB Databases** tabs (see Figure 5-6).

.

Figure 5-6.   OPAC Configuration - Request Form work space

3. On the **Select Form** tab edit the **Form Name** field and/or the **Instructions** field if wanted.

4. On the **UB Databases** tab, add or remove databases using the **>**, **>>**, **<** and **<<** buttons.

    - To add a database, highlight the database in the **Available Databases** list and click the **>** button to add it to the **Selected Databases** list.

      You can add all of the available databases to the **Selected Databases** list by clicking the **>>** button.

    - To remove a database from the **Selected Databases** list, highlight the database and click the **<** button. The database moves back to the **Available Databases** list.

      To remove all databases from the **Selected Databases** list, click the **<<** button. All of the selected databases move back to the **Available Databases** list.

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

    Result: The form has been edited.

    See Placing UB Requests in WebVoyáge on page 6-37 for information on how this form is populated.

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WebVoyáge

6

Introduction

Universal Borrowing requests can only be placed through WebVoyáge after a patron performs a search of a single remote database, a simultaneous search, or a search of a Universal Catalog, to identify a needed item.

This chapter discusses

- WebVoyáge configuration files used to accommodate UB
    - `opac.ini`
    - `connect.ini`
    - `*.htm` files and files in the `/images` directory
- Placing a UB Request in WebVoyáge

Security

In order to edit the various WebVoyáge configuration files operators must have access to the `/m1/voyager/xxxxdb` directory on the server where the Voyager database resides.

WebVoyáge Configuration Files

The WebVoyáge configuration files are located on your server in the `/m1/voyager/xxxdb/etc/webvoyage` directory and subdirectories. The configuration files have the extensions `*.ini` and `*.htm` and can be edited using a text editor on your server.

The files needing to be configured for UB are the `opac.ini` file, the `connect.ini` file, and several `*.htm` files.

Opac.ini File

The `opac.ini` file is located in each database sub-directory of the `/m1/voyager/xxxdb/etc/webvoyage` directory, that is, the `/local`, `/vcit`, `/zcit`, and `/z3950` sub-directories.

The `opac.ini` controls much of the functionality with WebVoyáge, as well as the visual configuration of the many WebVoyáge pages. Almost all of the text found on the WebVoyáge pages can be configured.

Stanzas related to UB are:

- `[Logon_Page]`
- `[Patron_Info_Page]`
- `[Patron_Request_Page]`
- `[Request Dialogs]`
- `[Request_Page]`
- `[Request_Select_Page]`
- `[Title_Bar]`
- `[UB Page]`
- `[View_Record_Page]`

There are additional stanzas and variables included in the `opac.ini` file that are not discussed in this user's guide. For more information about the `opac.ini` file and customizing WebVoyáge see the *Voyager WebVoyáge User's Guide*.

NOTE:
Many of the variables described below have default data elements. You can change the data elements if you wish or keep the defaults.

[Logon_Page] Stanza

The `HomeLibrary` variable allows you to define the text that displays in front of the database drop-down menu on the **Logon** page. The other variables in the stanza accommodate color settings for the **Logon** page.

```
[Logon_Page]
Background=
Text=
BGCOLOR=
LINK=
VLINK=
ALINK=
LastName=Last Name:
SubmitButton=Login
ResetButton=Reset
HomeLibrary=Home Library:
DefaultCluster=CLUSTER1
```

Figure 6-1.   Sample [Logon_Page] Stanza in the opac.ini

The `HomeLibrary` variable may contain alphanumeric text. It should be no longer than 22 characters so it fits on the login form. The `HomeLibrary` variable default is Home Library.

The cluster listed in the `DefaultCluster` variable always displays first in the drop-down menu following the text defined for the `HomeLibrary` variable. The other clusters display alphabetically beneath it.

See for an example of how the `HomeLibrary` and `DefaultCluster` variables display in WebVoyáge.
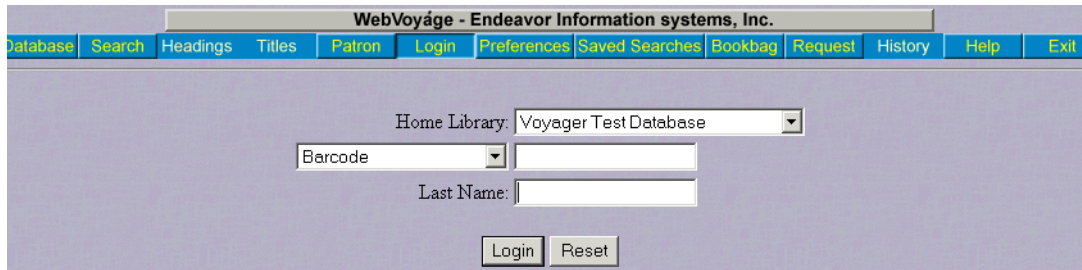
Figure 6-2. Logon Page Display in WebVoyáge

For more information about the other variables in the [Logon_Page] stanza, see the *Voyager WebVoyáge User's Guide.*

[Patron_Info_Page] Stanza

The **Patron Information** page in WebVoyáge contains several sections of information including:

- Personal information

- Charged item information

- Fines and fees information

- Request information

- UB specific variables

⚠ **IMPORTANT:**
*The **Patron Information** page in WebVoyáge is the only place where a patron can view all charges, requests, and fines and fees associated with his patron record.*

The [Patron_Info_Page] stanza of the opac.ini file allows you to define which of the sections and subsections display in the **Patron Information** page, the name of each section, the messages that display on each section when there is no available information, and what specific information displays.

The Personal Information Section Includes:

- Name, address and phone

- Preferences, book bag, save search, and change PIN buttons (if these are turned on and the logged in cluster is the patron's home cluster)

The Charged Items Section Shows:

- all charges, beginning with the patron's home library charges, followed alphabetically by any charges at UB libraries

  For example, if a patron had charges at his home library at Dyer, plus charges at Aimer and Cooper, the display would be Dyer, Aimer, Cooper. Voyager sorts by the database name that is entered in the **Name** field on the **Definitions** tab for each of the databases, see Definitions Tab on page 3-6. Within each library section, charges are sorted in chronological order by the current due date, soonest to latest.

The Request Information Section Displays:

- requests ordered by status, active or pending

  Active requests display in the **Pending Requests** section, and pending requests display in the **Items Available** section.

  Within each of those sections, home library requests display first followed alphabetically by any requests at UB libraries. Within each library section, requests are sorted by type in the following order: holds, recalls, call slips, and short loans.

The Fines and Fees Section Shows:

- all fines and fees from the home library and UB libraries

  The fines and fee information includes the create date. The create date is the date on which the overdue item is discharged or the date the fine/fee is manually added to the patron's record.

The [Patron_Info_Page] stanza is divided into sections which are separated by pound signs (#) and labeled. The following figure (Figure 6-3) shows an example of this stanza.

```
[Patron_Info_Page]
##### Page Appearance #####
Background=
Text=
BGCOLOR=
LINK=
VLINK=
ALINK=


###### Personal Information Section ######
Personal=Personal Information
PersonalInfoSectionLabelColor=#0000FF
PersonalInfoDataFontColor=#000000


###### Charged Items Section ######
Charged=Charged Items
SelfRenew=Y
ItemInfo=\a \t \i Location: \l \c
ChargedItem=Charged: Due \d \u
RenewedItem=Renewed: Due \d \u
RecalledItem=Recalled: \d \u (\f)
Renew=Renew?
RenewalStatus=Renewal Status
RenewedDue=Renewed: Due
NotRenewed=Not Renewed
NoCharges=You have no charged items.
SubmitButton=Renew Items
ChargedItemsBorderVal=1
ChargedItemsSectionLabelColor=#0000FF
ChargedItemsDatabaseNameColor=
ChargedItemsHeaderColor=#990000
ChargedItemsHeaderFontColor=#FFFFFF
ChargedItemsDataColor=#CCCCFF
ChargedItemsDataFontColor=#000000
```

```
##### Requests Section #####
Requests=Request Information
CancelRequests=Y
ReqPending=Requests Pending
Cancel=Cancel?
Pick_Up_At=Pick up at
-=-
Position=Position:
Expires=Expires:
ReqAvail=Items Available
PickupLocation=Pickup Location
NoReqAvail=You have no items available.
NoReqPending=You have no requests pending.
CancelButton=Cancel Requests
RequestedFrom=Requested from
InTransitTo=In transit to
RequestsBorderVal=1
RequestsSectionLabelColor=#0000FF
RequestsDatabaseNameColor=
RequestsHeaderColor=#990000
RequestsHeaderFontColor=#FFFFFF
RequestsDataColor=#CCCCFF
RequestsDataFontColor=#000000

##### Fines & Fees Section #####
Fines=Fines and Fees
Date=Date
FeePostingType=Fee/Posting Type
Fee=Fee
Posting=Posting
Balance=Balance
TotalAmountDue=Total Amount Due
NoFines=You have no fines or fees.
FinesFeesBorderVal=1
```

```
FinesFeesSectionLabelColor=#0000FF

FinesFeesDatabaseNameColor=

FinesFeesHeaderColor=#990000

FinesFeesHeaderFontColor=#FFFFFF

FinesFeesDataColor=#CCCCFF

FinesFeesDataFontColor=#000000


##### Misc #####

Status=Status

Item=Item

ResetButton=Reset

FailedToConnect=Unable to retrieve data from

RequestedFrom=Requested from

InTransitTo=In transit to
```

Figure 6-3.   Example of the [Patron_Info_Page] stanza in the opac.ini file

The Three UB Specific Variables

There are three variables in this stanza that can be defined for Universal Borrowing. The `RequestedFrom` and `InTransitTo` variables are located in the `Requests Section` of the stanza, and the `FailedToConnect` variable is located in the Misc. section of the stanza. Table 6-1 describes these variables.

Table 6-1.   RequestedFrom, InTransitTo, and FailedToConnect Variables in the [Patron_Info_Page] Stanza

Variable	Description
RequestedFrom	The `RequestedFrom` variable controls the text that displays in the title column of the Requests section for all UB items requested from a library other than the Patron's home library.
	The default text is `Requested from`.
	The system appends the appropriate database name to the end of the text. For example, if a patron's home library is Aimer, and he has several UB Requests for items at Blake, the title column of the Request section will display the title of the item followed by Requested from BlakeCat.
	You can change the text or use the default text.

Table 6-1.   RequestedFrom, InTransitTo, and FailedToConnect Variables in the [Patron_Info_Page] Stanza

Variable	Description
InTransitTo	The `InTransitTo` variable controls the text that displays in the status column of the Pending Requests section for all UB items that are in transit from the holding library to the pickup library.
	The default text is `In transit to`. The system appends the appropriate database name to the end of the text. For example, if a patron has requested an item from Blake to be picked up at Dyer, and Blake has processed the item in Call Slip, the status column of the Pending Requests for that item will display In Transit to Dyer.
	You can change the text or use the default text.
FailedToConnect	The `FailedToConnect` variable controls the message which displays when the home library is unable to connect to, retrieve, and display information from another library regarding the patron's UB charges, requests, and fines/fees.
	The default message is `Unable to retrieve data from`. The system appends the appropriate database name to the end of the message.
	For example, if a patron has UB Requests for items at Aimer, Blake, and Dyer but the system is unable to connect to Dyer when the patron checks his patron information in WebVoyáge, the Requests section of the Patron Information page will display the message Unable to retrieve data from DyerCat. You can change the message or use the default message.

For more information about the other variables in the [Patron_Info_Page] stanza, see the *Voyager WebVoyáge User's Guide*.

[Patron_Request_Page], [Request_Page] and [Request_Select_Page] Stanzas

The [Patron_Request_Page] stanza of the opac.ini allows you to define color settings for the page that displays after the successful submission of a UB Request. This stanza only needs to be configured if you want to change the colors of the page.

The [Request_Page] stanza of the opac.ini allows you to define color settings for the page that displays if there is a validation error after a patron clicks the **Submit** button on the UB Request form. This stanza only needs to be configured if you want to change the colors of the page.

The [Request_Select_Page] stanza of the opac.ini allows you to define color settings for the page on which a patron selects a request form. This stanza only needs to be configured if you want to change the colors of the page.

There are numerous stanzas within the opac.ini file that control the colors of specific pages within WebVoyáge. The [Html_Body] stanza contains the variables that are used for pages that have not been configured. If you want each page to have identical color settings, you need only to configure the variables in the [Html_Body] stanza. If you want any page within WebVoyáge to have unique color settings, you need to configure the stanza within the opac.ini that applies to that specific page.

This stanza contains the same variables as the [UB_Page] stanza for controlling color settings. For more information about defining color settings for this particular page, see [UB_Page] Stanza on page 6-12 and the *Voyager WebVoyáge User's Guide.*

[Request_Dialogs] Stanza

The [Request_Dialogs] stanza of the opac.ini file allows you to define all of the labels that display on the different varieties of WebVoyáge request forms.

There are three variables in the [Request_Dialogs] stanza that are specific to Universal Borrowing. They are UBLibrary, UBPickupLib, and UBPickupDesk.

```
[Request Dialogs]
#
NotNeededAfter=Not Needed After
NotNeededAfterDays=
#
# These are labels for the UB Request form
#
UBLibrary=Library:
UBPickupLib=Pick Up Library:
UBPickupDesk=Pick Up At:
```

Figure 6-4.   UB Section of the [Request_Dialogs] Stanza of the opac.ini File

NOTE:
Figure 6-4 is a truncated display of the [Request_Dialogs] stanza. There are many more variables in the stanza related to other types of requests. For more

information about all the variables in the [Request_Dialogs] stanza, see the *Voyager WebVoyáge User's Guide*.

⚠ **IMPORTANT:**
These three fields display on the UB Request form. The variables do not have default values so you must define each label if you want that label to display on the WebVoyáge UB Request form.

Table 6-2.   Variables in the [Request_Dialogs] Stanza of the opac.ini File

Variable	Description
NotNeededAfter and NotNeededAfter-Days	Both the NotNeededAfter and the NotNeededAfterDays variables have default values which display on the UB Request form. The default value for the NotNeededAfter variable is: Not Needed After. The default value for NotNeededAfterDays is 30. You can change the values for either of these variables.
UBLibrary	The **Library** field only displays on the system defined UB Request form. The information entered after the UBLibrary variable displays as the label beside the field that contains the list of locations at which UB eligible items exist. For example, if you wanted Owning Library to display beside the drop-down list, you would enter that text after the variable, that is, UBLibrary=Owning Library. If nothing is entered after the UBLibrary variable, no label displays beside the drop-down list of libraries.
UBPickupLib	The **Pick Up Library** field only displays on the system defined UB Request form. The information entered after the UBPickupLib variable displays as the label beside the field that contains the list of UB locations at which a patron may pickup a UB Requested item. For example, if you wanted Pick Up Library to display beside the drop-down list, you would enter that text after the variable, that is, UBPickupLib=Pick Up Library. If nothing is entered after the UBPickupLib variable, no label displays beside the drop-down list of libraries.
UBPickupDesk	The **Pickup Desk** field only displays on the system defined UB Request form. The information entered after the UBPickupDesk variable displays as the label beside the field that contains the list of Pickup locations for the library selected from the **Pickup Library** drop-down list. For example, if you wanted Pick Up At to display beside the drop-down list, you would enter that text after the variable, that is, UBPickupDesk=Pick Up At. If nothing is entered after the UBPickupDesk variable, no label displays beside the drop-down list of happening locations.

[Title_Bar] Stanza

The [Title_Bar] stanza contains the variables that control the text in the title bars of various WebVoyáge pages. The title bar is the bar at the very top of the Web Browser which usually contains the title of the page currently displayed (see Figure 6-5). In that WebVoyáge example the title bar is the top portion of the display with the text Universal Borrowing.

The UB_Requests variable controls the text that displays in the title bar whenever the UB Request form ([UB_Page]) displays in WebVoyáge. Enter the information you want to display in the title bar of the UB Request page after the UB_Requests variable. If nothing is entered after this variable, Universal Borrowing is used as the default.
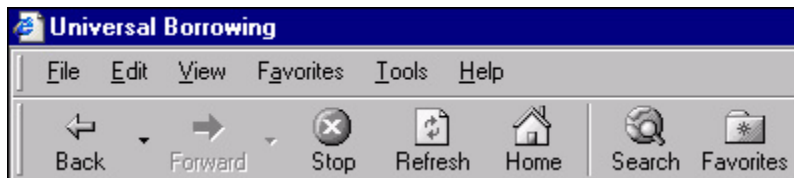
Figure 6-5.   Example of a Title Bar Display in WebVoyáge

This stanza contains the UB_Requests variable for Universal Borrowing (see Figure 6-6).

```
[Title_Bar]
UB_Requests=Universal Borrowing Request
```

Figure 6-6.   Sample [Title_Bar] Stanza of the opac.ini File

NOTE:
The sample stanza in Figure 6-6 is truncated and shows the UB variable only. There are many more variables included in this stanza. For more information see the *Voyager WebVoyáge User's Guide.*

[UB_Page] Stanza

The [UB Page] stanza is the web page on which the UB Request form displays. This stanza is specifically for Universal Borrowing. Figure 6-7 shows and example of this stanza.

```
[UB_Page]

Background=

Text=

BGCOLOR=

LINK=

VLINK=

ALINK=

TurnOffLibraryDropDown=N

Copy=Copy

SupplyDefaultPickupLocs=Y

SelectPickupLocs=You must provide a Pick Up Library and Desk
        before your request is complete!
```

Figure 6-7.   Sample [UB_Page] Stanza of the opac.ini File

The [UB_Page] stanza allows you to:

- control the **Library** drop-down list on the UB Request form for serial and non-serial bibliographic records

- control the **Library** drop-down list on the UB Request form to display only one randomly selected item

- add or change any background images or colors for the UB page display in WebVoyáge

- control the text which displays before the **Copy** field on the UB Request form

- control default pickup location selection.

Table 6-3 details the variables in the `[UB_Page]` stanza of the `opac.ini file`.

Table 6-3.   Variables in the [UB_Page] Stanza of the opac.ini File

Variable	Description
Background	If you want the background of a page to display as an image, enter the path and name of the image after the `Background` variable. For example, if you wanted to use an image called `bg4.gif` from the `/images` directory, you would enter `/images/bg4.gif` after the `Background` variable (***Background=/images/bg4.gif***). If an image is entered after the `Background` variable of a specific page's stanza, it overrides any color that may be entered after the `BGCOLOR` variable in that stanza. Also, if an image is entered after the `Background` variable in the `[Html_Body]` stanza, that image overrides any color that is entered after the `BGCOLOR` variable in any of the specific pages' stanzas. However, if an image is entered after the `Background` variable in any of the specific pages' stanzas, that is used in place of the image specified in the `[Html_Body]` stanza.
Text	The `Text` variable controls the color of the text on a page. You must use a hexadecimal rgb color code to specify a color. Enter a hexadecimal color code after the `Text` variable to configure the color of the text on a page. For example, if you wanted to make the text on a page white, you would enter ffffff (the hexadecimal color code for white) after the `Text` variable (***Text=ffffff***). Entering a hexadecimal color code after the `Text` variable in a specific page's stanza overrides the hexadecimal color code that may be entered after the `Text` variable in the `[Html_Body]` stanza. If nothing is entered after the `Text` variable in the specific page's stanza or the `[Html_Body]` stanza, the text color defaults to the settings of the web browser.
BGCOLOR	The `BGCOLOR` variable controls the color of the background of a page. You must use a hexadecimal rgb color code to specify a color. Enter a hexadecimal color code after the `BGCOLOR` variable to configure the background color of a page. For example, if you wanted to make the background of a page white, you would enter ffffff (the hexadecimal color code for white) after the `BGCOLOR` variable (***BGCOLOR=ffffff***). Entering a hexadecimal color code after the `BGCOLOR` variable in a specific page's stanza overrides the hexadecimal color code that may be entered after the `BGCOLOR` variable in the `[Html_Body]` stanza. If an image is entered after the `Background` variable of a specific page's stanza, it overrides any color that may be entered after the `BGCOLOR` variable in that stanza. Also, if an image is entered after the `Background` variable in the `[Html_Body]` stanza, that image overrides any color that is entered after the `BGCOLOR` variable in a specific page's stanza. If nothing is modifying the background color of a page, the background color defaults to the settings of the web browser.

Table 6-3. Variables in the [UB_Page] Stanza of the opac.ini File

Variable	Description
LINK	The LINK variable controls the color of unclicked (unvisited) links on a page. You must use a hexadecimal rgb color code to specify a color. Enter a hexadecimal color code after the LINK variable to configure the color of unvisited links on a page. For example, if you wanted to make the unvisited links on a page red, you would enter ff0000 (the hexadecimal color code for red) after the LINK variable (***LINK=ff0000***). Entering a hexadecimal color code after the LINK variable in a specific page's stanza overrides the hexadecimal color code that may be entered after the LINK variable in the [Html_Body] stanza. If nothing is entered after the LINK variable in the specific page's stanza or the [Html_Body] stanza, the color of unvisited links defaults to the settings of the web browser.
VLINK	The VLINK variable controls the color of clicked (visited) links on a page. You must use a hexadecimal rgb color code to specify a color. Enter a hexadecimal color code after the VLINK variable to configure the color of visited links on a page. For example, if you wanted to make the visited links on a page yellow, you would enter ffff00 (the hexadecimal color code for yellow) after the VLINK variable (***VLINK=ffff00***). Entering a hexadecimal color code after the VLINK variable in a specific page's stanza overrides the hexadecimal color code that may be entered after the VLINK variable in the [Html_Body] stanza. If nothing is entered after the VLINK variable in the specific page's stanza or the [Html_Body] stanza, the color of visited links defaults to the settings of the web browser.
ALINK	The ALINK variable controls the color of a link at the time it is clicked. You must use a hexadecimal rgb color code to specify a color. Enter a hexadecimal color code after the ALINK variable to configure the color of visited links on a page. For example, if you wanted to make the visited links on a page yellow, you would enter ffff00 (the hexadecimal color code for yellow) after the ALINK variable (***ALINK=ffff00***). Entering a hexadecimal color code after the ALINK variable in a specific page's stanza overrides the hexadecimal color code that may be entered after the ALINK variable in the [Html_Body] stanza. If nothing is entered after the ALINK variable in the specific page's stanza or the [Html_Body] stanza, the color of visited links defaults to the settings of the web browser.
TurnOff Library-DropDown	The TurnOffLibraryDropDown variable controls the drop-down list of UB libraries that displays in the **Library** field on the UB Request form in Web-Voyáge. See Setting the Library Lock Down Variable: TurnOffLibraryDrop-Down on page 6-16

Table 6-3. Variables in the [UB_Page] Stanza of the opac.ini File

Variable	Description
Copy	The information entered after the `Copy` variable displays as the label beside the field that contains the list of UB eligible copies. For example, if you wanted Available Copies to display beside the drop-down list, you would enter that text after the variable, for example, ***Copy=Available Copies***. If nothing is entered after the `Copy` variable, the label defaults to Copy.
SupplyDe-faultPick-upLocs	Indicates that a default pick up cluster and desk is supplied to the patron in some scenarios when the UB Request form is rendered in WebVoyáge. If this field is set to `N` and the customer's home cluster is not a valid pick up location, the customer must select a pick up location to complete the UB request. For more information, see <u>Controlling the Default Pickup Location Selection</u> on <u>page 6-18</u>. The default value is `Y`, which allows the same functionality as provided in Voyager 6.2 and earlier releases.
Select-PickupLocs	The message that is returned to the customer when a pick up location is not specified for a UB Request in WebVoyáge. The following message is used as the default: `You must provide a Pick Up Location and Desk before your request is complete!`

Setting the Library Lock Down Variable: TurnOffLibraryDropDown

The `TurnOffLibraryDropDown` variable is the lock down variable that controls the drop-down list of UB libraries that displays in the **Library** field on the UB Request form in WebVoyáge.

This variable allows you to control whether only one UB library displays in the field or many UB libraries display in the drop-down list. If you have the variable turned on, the system also checks the bibliographic level of the item. Byte 07 of the bibliographic record's leader field is examined and the absence or presence of an **s**, indicating a serial title, determines what displays in the **Library** field of the UB Request form.

The `TurnOffLibraryDropDown` variable controls the switch

- to allow a list of UB libraries to display, enter a **N** (no) after the equals sign.
- to lock down the drop-down list so that only one randomly-selected library displays, enter a **Y** (yes) after the equals sign.

The default for the `TurnOffLibraryDropDown` variable is **N**.

An example of how this variable works follows:

1. A patron, using simultaneous searching, searches multiple databases or searches a UC in WebVoyáge. The results of the search indicate that multiple copies of the requested item exist. The patron clicks the **Request** button, enters his patron information, and selects the UB Request form.

2. Before the UB Request form displays, the system checks the status of the items to make sure they are UB eligible items, that is, the item status is either Not Charged or Discharged.

3. The contents of the drop-down list is determined:

   - If the `TurnOffLibraryDropDown` variable is set to No, the **Library** field of the UB Request form is populated by a randomly-generated list of all the UB libraries that own UB eligible copies of the requested item. The patron may accept the first library (cluster) from in the **Library** field or click the drop-down arrow and select another cluster from the list.

   - If the `TurnOffLibraryDropDown` variable is set to Yes, and byte 07 of the bibliographic record's leader field is an s, indicating a serial, the form displays in the same manner. All UB libraries with UB eligible copies of the requested item display in the list. Again, the patron may accept the first library from the **Library** field or click the drop-down arrow and select another library from the list. The drop-down list includes the enumeration/chronology of the serial item so that the patron is able to select the correct item.

   - If the `TurnOffLibraryDropDown` variable is set to Yes, and byte 07 of the bibliographic records' leader field is not an s, then only one randomly-selected library displays in the **Library** field of the UB Request form and a drop-down list is not available. The patron must make their request from the library that displays.

Adding or Changing Background Images or Colors

The `[UB_Page]` stanza has been added to the `opac.ini` to accommodate color settings for the UB Request page that displays in WebVoyáge. There are numerous stanzas within the `opac.ini` that control the colors of specific pages within WebVoyáge. The [Html_Body] stanza contains the variables that are used for pages that have not been configured. If you want each page to have identical color settings, you need only to configure the variables in the `[Html_Body]` stanza. If you want any page within WebVoyáge to have unique color settings, you need to configure the stanza within the `opac.ini` that applies to that specific page.

Controlling the Default Pickup Location Selection

The `SupplyDefaultPickupLocs` and the `SelectPickupLocs` fields of the `[UB_Page]` stanza are used to control the selection of the default pickup location.

If the home cluster is a valid pickup location, the home cluster always appears as the default in the **Pickup Location** drop-down menu, followed by the other pickup locations listed in alphabetical order.

If the home cluster is *not* a valid pickup location, the default pickup location is determined by the setting of the `SupplyDefaultPickupLocs` field as follows:

- If set to `Y`, the default pickup location is set to the first pickup location in the drop-down menu.

- If set to `N`, the pickup locations are listed alphabetically in the drop-down menu, but a default is not selected. If the user does not select a pickup location before submitting the UB request, the error message defined in the `SelectPickupLocs` field is displayed.

[View_Record_Page] Stanza

This stanza in the `opac.ini` file contains three variables to allow patrons to view a list of libraries which own a particular item and then to jump to the holdings information for one of the libraries on the list. These variables, `DBHoldingsJumpBar`, `DBHoldingsJumpBarText`, and `DBHoldingsJumpBarBack`, simply allow the patron to move easily around the holdings display to find the information they need. shows a truncated example of the `[View_Record_Page]` stanza.

```
[View_Record_Page]
DBHoldingsJumpBar=Y
DBHoldingsJumpBarText=Held at:
DBHoldingsJumpBarBack=Back to library list
```

Figure 6-8.   Sample [View_Record_Page] stanza of the opac.ini file

For example, if a patron performs a search for a title and Aimer, Blake, Cooper, and Dyer all own copies if the item, each library would be listed at the top of the holdings display as hyperlinks. If the patron clicks on the Dyer hyperlink, then Dyer's holdings information displays. In addition, a hyperlink to move back to the list at the top of the page displays beneath the individual holdings information for

each library. Without the hyperlink in place, patrons are forced to scroll up and down a very long web page, depending on how many databases have been searched.

Table 6-4 describes these variables.

Table 6-4.   Variables in the [View_Record_Page] Stanza of the opac.ini File

Variable	Description
DBHoldingsJumpBar	The DBHoldingsJumpBar variable controls the switch which enables the jump bar functionality. To allow the jump bar feature, enter a *Y* (yes) after the equals sign. If you do not want the jump bar feature to be available in WebVoyáge, enter a *N* (no) after the equals sign. The default for the DBHoldingsJumpBar variable is N.
DBHoldingsJumpBar-Text	The DBHoldingsJumpBarText variable controls the text which precedes the list of holding databases. For example, if you enter Held at: after the equals sign, then Held at: displays to the left of the list of holding databases (see DBHoldingsJumpBarText Variable in WebVoyáge on page 6-20). If you have enabled the jump bar feature by setting the DBHoldingsJumpBar variable to Yes, but do not enter anything after the DBHoldingsJumpBarText variable, no text precedes the list. **NOTE:** The database names that display in the jump bar list are pulled from the **Name** field defined in System Administration (see Database Tab on page 3-4).
DBHoldingsJumpBar-Back	The DBHoldingsJumpBarBack variable controls the text for the hyperlink following each individual holdings statement. For example, if you enter Back to library list after the equals sign, then Back to library list displays as a hyperlink beneath the individual holdings statements (see DBHoldingsJumpBar-Text Variable in WebVoyáge on page 6-20). If you have enabled the jump bar feature by setting the DBHolding-sJumpBar variable to Yes, but do not enter anything after the DBHoldingsJumpBarBack variable, no hyperlink displays.

There are more variables included in this stanza. For more information see the *Voyager WebVoyáge User's Guide*.

⚠️ **IMPORTANT:**
In order for the Jump Bar feature to work correctly, the 9000 routine (for holdings information) must be included in one of the DisplayN.cfg files and the DBHoldingsJumpBar variables must be set to "Y" (yes).

For more information about the `DisplayN.cfg` files see the *Voyager WebVoyáge User's Guide*.

Notes Regarding the Jump Bar Feature

- The Jump Bar displays as a list of hyperlinks (see Figure 6-9 and Figure 6-10). The list displays at the top of the holdings display, preceded by any text added to the `DBHoldingsJumpBarText` variable.

- Each hyperlink in the list links to the first line of holdings information for the particular database.

- The list of databases displays in the order sent back by the server.

- The list of databases is vertical, that is, each database displays on a separate line in the display.

If holdings information exists for only one database, or there is no holding information associated with a title, the Jump Bar feature does not display.
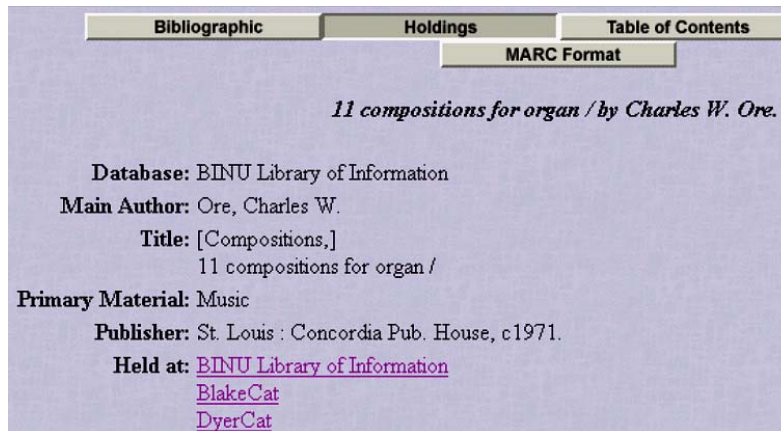
Figure 6-9.   DBHoldingsJumpBarText Variable in WebVoyáge
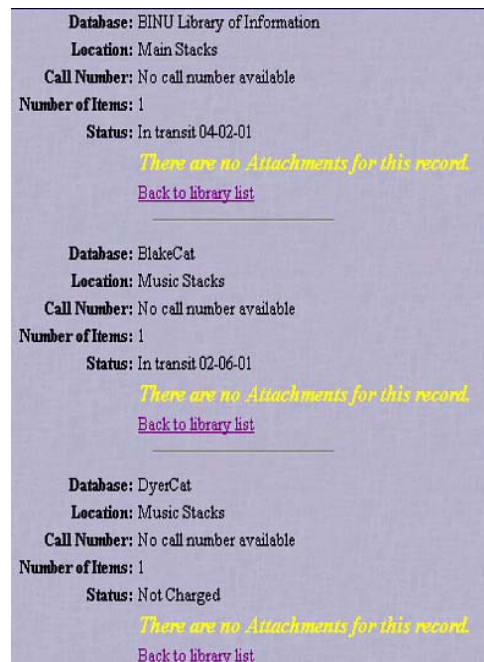
Figure 6-10.   DBHoldingsJumpBarBack Variable in WebVoyáge

Connect.ini File

The `connect.ini` file is the configuration file that specifies the connections to the databases (Voyager, Z39.50, or Citation) that display on the **Select Database** page in WebVoyáge. You can access the **Select Database** page by clicking the **Database** button in WebVoyáge.

The `connect.ini` file is located in the `/m1/voyager/xxxdb/etc/webvoyage` directory.

You must add the database code for each of the databases that are defined in System Administration (see <u>Search - Database Definitions work space</u> on <u>page 3-2</u>) to the `connect.ini` file in at least one place before you can connect to the database in WebVoyáge. That is, a database does not display on the **Select Database** page unless defined in the `connect.ini` file. There is no limit to the number of databases that may be listed in the `connect.ini` file.

The entry for a UB database can be configured in three different places in the `connect.ini` file:

1. You can have the UB databases display in an existing group on the **Select Database** page. This requires adding the UB database code(s) to an existing `[Set Name]` stanza.

2. You can create a new group that displays on the **Select Database** page and have all the UB databases display in a list following the group name. Patron's can choose one or more databases from the list to perform a simultaneous search.

    This requires:

    - adding the name of the new group to your existing `[Folders]` stanza

    - creating a new `[Set Name]` stanza specifically for the UB databases

    - adding the UB database codes to the new stanza

3. You can combine the UB databases into a group of databases which can be searched simultaneously by highlighting the name of the group on the **Select Database** page.

    This requires:

    - adding the group name to an existing `[Set Name]` stanza

    - adding a `[Location]` stanza for the group

    - adding the UB database codes to a `[List Location]` stanza

Figure 6-11 displays a sample `connect.ini` file incorporating each of these options.

```
[Folders]                          [FOLDERS] STANZA
1=Voyager Libraries
2=UB Libraries
3=Citation Databases


[Voyager Libraries]                [SET NAME] STANZA
1=LOCAL
2=ALLEN
3=EASTERN
4=Single Search UB Libraries


[UB Libraries]                     [SET NAME] STANZA
1=AIMER
2=BLAKE
3=COOPER
4=DYER


[Citation Databases]               [SET NAME] STANZA
1=WEBED


[Single Search UB Libraries]    [LOCATION] STANZA
Config=ublib
Type=G
Name=Universal Borrowing Libraries


[List Single Search UB Libraries]    [LIST LOCATION] STANZA
1=AIMER
2=BLAKE
3=COOPER
4=DYER
```

Figure 6-11.   Sample connect.ini File

The sample connect.ini file in Figure 6-11 would display in WebVoyáge as in Figure 6-12.
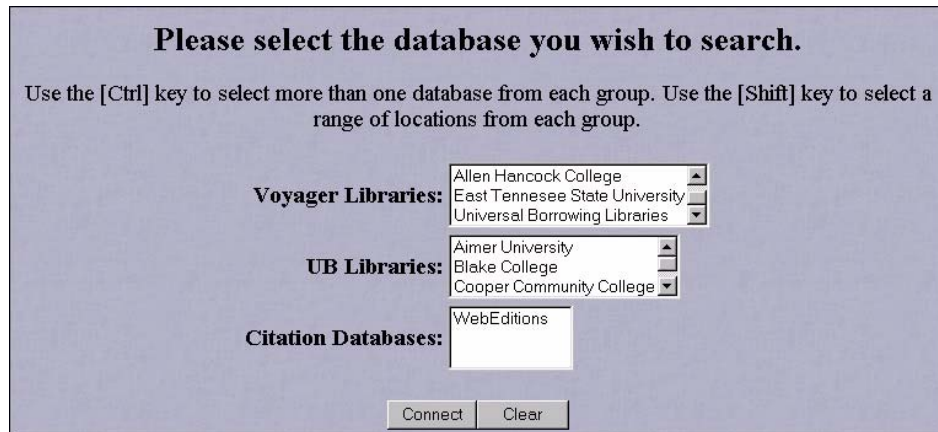
Figure 6-12.   Sample Select Database Page in WebVoyáge

Overview of the connect.ini file

The first stanza in the `connect.ini` file is the `[Folders]` stanza, which contains the name of each set of connections that displays on the **Select Database** page in WebVoyáge.

There is no limit to the number of set names that can be within the `[Folders]` stanza. Each name displays next to a list on the **Select Database** page in WebVoyáge.

In <u>Figure 6-11</u>, the set names are Voyager Libraries, UB Libraries, and Citation Databases.

The contents of each set is defined by a stanza bearing that set's name (for example, `[Voyager Libraries]`). A maximum of 20 items can be contained within each `[Set Name]` stanza. Each item listed in the `[Set Name]` stanza is either a database code or the name of a group of databases. A `[Set Name]` stanza must be created for each set before defining specific locations.

After defining all the set names, the next stanza, the [Location] stanza, bears the names of the locations exactly as entered into the lines of the set definitions stanzas. These locations contain additional optional information about a location, or information that defines the locations as a group of locations to be searched simultaneously.

If the locations is to be a group, a fourth type of stanza, the [List Location] stanza, follows. The stanza is defined as a list stanza by placing the word List before the name of the location stanza, and contains all the names of the locations to be simultaneously searched.

⚠️ **IMPORTANT:**
Stanza names may NOT be repeated. Each name of each stanza should be unique. Using any stanza name more than once may cause your connections to fail. Any names that refer to other stanzas in the file must not be repeated.

The database code for a database may be specified more than once within the lists in the connect.ini (that is, you may add the database code to more than one list). If a database code is used as the name of a stanza, however, you may only have one stanza named after that database code.

[Folders] Stanza

The [Folders] stanza defines the name of each set of databases that you want to display on the **Select Database** page.

To create each set, the following must be specified in the [Folders] stanza: a line indicator, an equals sign, and the name of the set. The set's name must be entered exactly as you want it to display beside the set on the **Select Database** page in WebVoyáge.

The [Folders] stanza shown in

```
[Folders]
1=Voyager Libraries
2=UB Libraries
3=Citation Databases
```

Figure 6-13.   Sample [Folders] Stanza

display on the **Select Database** page in WebVoyáge as shown in .
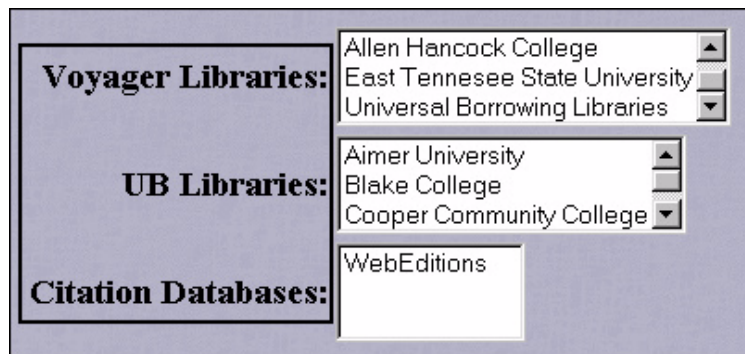
Figure 6-14.   [Folders] Stanza as Displayed in WebVoyáge

NOTE:
If you are creating a new set, you must also add a new `[Set Name]` stanza for the group and enter the database code into your new `[Set Name]` stanza.

Each line's indicator may be a number or a character, as long as line indicators are not used more than once within the stanza.

The line is entered as follows:

- Enter a character (for example, enter 1 or A for the first folder), then an equals sign (=), followed by the name of the folder.

Repeat the previous instructions for each set that you want to display. The order (from the top of the file) in which the sets are entered is the order (from the top) that the sets display on the **Select Database** page in WebVoyáge.

For more information on the `[Folders]` stanza, see the *Voyager WebVoyáge User's Guide*.

[Set Name] Stanzas

For every set name specified in the `[Folders]` stanza, a `[Set Name]` stanza must define the contents of the set.

You can choose to define UB databases in two ways:

- create a new set for the UB databases by creating a new `[Set Name]` stanza.
- add a UB database to an existing set of databases by adding the UB database code to one of the existing `[Set Name]` stanzas.

The name of this stanza must match the *name* of the set entered after the equals sign in a line of the [Folders] stanza. If you entered UB Libraries in the [Folders] stanza, then you must enter [UB Libraries] for the set name stanza.

This [Set Name] stanza contains the database codes defined for the UB databases that allow connections on the **Select Database** page in WebVoyáge.

To create the connection, the following must be specified in the set name stanza: a line indicator, an equals sign, and the database code that you established for the UB databases in Database Definitions in the System Administration module (see Search - Database Definitions work space on page 3-2 for more information).

Example 1

If you were creating a new [Set Name] stanza to accompany a new set in which UB databases display, the stanza that you would add would be similar to that shown in Figure 6-15.

```
[UB Libraries]
1=AIMER
2=BLAKE
3=COOPER
4=DYER
```

Figure 6-15.   Sample Folder List Stanza

In WebVoyáge, the contents of this stanza would display in the UB Libraries list as shown in Figure 6-16.
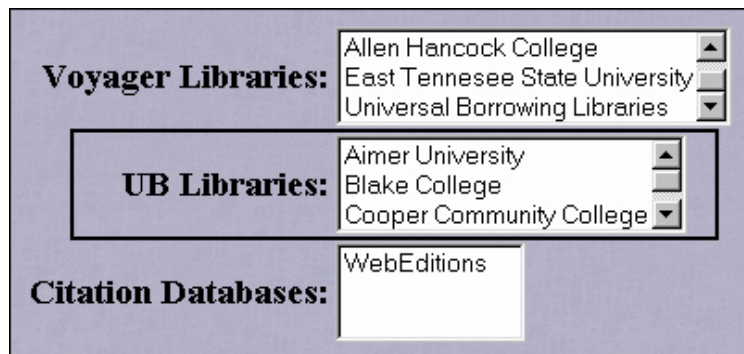
Figure 6-16. **[Set Name] Stanza as Displayed in WebVoyáge**

Example 2

If you were adding the UB databases to an existing [Set Name] stanza, you could:

- add individual UB database codes to an existing set name stanza, or
- add a group name to an existing set name stanza if you want the UB databases to be searched simultaneously as a group

If you want to add individual UB database codes to an existing set name stanza, your [Set Name] stanza might look like .

```
[Voyager Libraries]
1=LOCAL
2=AIMER
3=BLAKE
4=COOPER
5=DYER
```

Figure 6-17. **Database Added to Existing Set Name Stanza**

If you want to add a group name to an existing set name stanza in order to simultaneously search a group of UB databases, your [Set Name] stanza might look like .

```
[Voyager Libraries]
1=LOCAL
2=ALLEN
3=EASTERN
4=Single Search UB Libraries
```

Figure 6-18.   New Group Name in a Set Name Stanza

In WebVoyáge, the contents of the above stanza would display on the **Select Database** page in the Voyager Libraries list (see Figure 6-19).
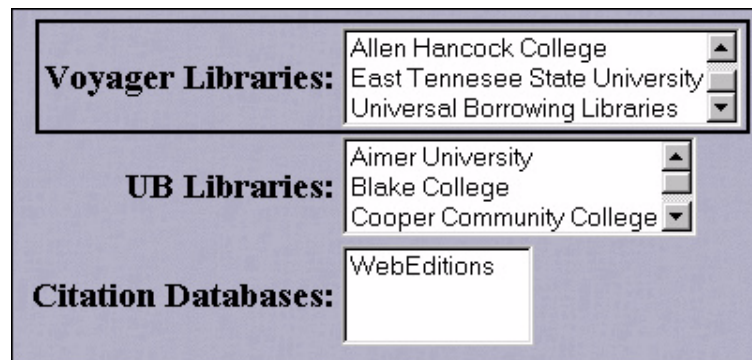
Figure 6-19.   [Set Name] Stanza as Displayed in WebVoyáge

Each line's indicator may be a number or a character, as long as within the stanza line indicators are not repeated.

Procedure 6-1.   Creating a New Location in a Set Name Stanza

Use the following to create a new location in a [Set Name] stanza.

1. In the connect.ini file, using a server side text editor,

    a. enter a character (for example, enter 2 or A for the first location)

    b. enter an equals sign (=)

c. followed by the code of the database or the name of the group of databases

There is a limit of 20 locations codes per [Set Name] stanza, whether the code is itself for a single database or a group of databases.

If you need to specify optional configuration information for a location, or to define the database codes for a group of databases, then you must create a new [Location] stanza using the code as the stanza name. For example, in Figure 6-19 the name "Universal Borrowing Libraries" in the Voyager Libraries list is defined in the [Locations] stanza for the "Single Search UB Libraries" group. You must create a [Location] stanza if you plan to use any customized configuration files.

For more information on the [Set Name] stanza, see the *Voyager WebVoyáge User's Guide*.

[Location] Stanza

You can use the [Location] stanza to supply additional connection information about a database or to customize WebVoyáge when connected to a database. [Location] stanzas do not display in WebVoyáge, they are used by WebVoyáge to configure a connection.

You can also use the [Location] stanza to create a group of sites that can be selected as a whole on the **Select Database** page in WebVoyáge. After you have created the [Folders] stanza and all of the [Set Name] stanzas, the next stanza to define is the [Location] stanza.

Each [Location] stanza corresponds to a location listed in one of the [Set Names] stanzas. This stanza is optional if you want to use the stanza to supply additional connection information. The stanza is required if the location is in fact a group of locations.

The name of this [Location] stanza is the name of the database code or group name that you added to a [Set Name] stanza. That is, if the database code was AIMER, then the location stanza would be called [AIMER].

Using the [Location] Stanza to Supply Connection Information

You can specify the location of the configuration file for a particular connection or define a new bitmap for the WebVoyáge window. The location stanza can contain either or both (or neither) the Config and Bitmap variables.

- The Config variable specifies the display config directory.

- The Bitmap variable specifies the name of the new bitmap that displays in the background once the patron has connected to that database. The bitmap file must be in the directory specified by the Config variable.

For example, if the database code were AIMER, you might create the following stanza (see Figure 6-20).

```
[AIMER]
Config=aimer
Bitmap=aimerLogo.bmp
```

Figure 6-20.   List Location Stanza

Because [Location] stanzas do not display in WebVoyáge, this stanza is not displayed on the **Select Database** page in WebVoyáge.

Using the [Location] Stanza to Group Search Locations

You can group sites (databases) within the menu so that you can select a group of sites at once when designating search locations. The [Location] stanza is used to specify that the name refers to a group and not a specific location. Creating a group also requires an additional stanza to define the list [List Location] Stanza on page 6-32.

In the location stanza, you must include the Type and Name variables.

- The Type variable must be equal to G. This defines the stanza as a group stanza.

- The Name variable may be anything (other than the name of another stanza). The test you specify after the Name variable shows up as the name of the group on the **Select Database** page in WebVoyáge.

The [Location] stanza name must be identical to its entry in one of the line of the [Set Name] stanza. For example, if you added the group Single Search UB Libraries to the [Voyager Libraries] set name stanza, the corresponding location stanza would be created as shown in Figure 6-21.

```
[Single Search UB Libraries]
Type=G
Name=Universal Borrowing Libraries
```

Figure 6-21.   Sample Location Stanza

For more information on the `[Location]` stanza, the *Voyager WebVoyáge User's Guide*.

[List Location] Stanza

The final stanza in the `connect.ini` file is the `[List Location]` stanza. This stanza is optional. It is only used when defining a group of search locations. You need one `[List Location]` stanza for every group of search locations that you wish to define.

The name of the stanza must begin with the word List, and is followed by the name of the group exactly as it displays in the name of the `[Location]` stanza.

The contents of the `[List Location]` stanza are a numbered list of locations that can all be searched if this option is chosen in the **Select Database** page in WebVoyáge.

For example, if the `[Location]` stanza was named Single Search UB Libraries, the list locations stanza is shown in .

```
[List Single Search UB Libraries]
1=AIMER
2=BLAKE
3=COOPER
4=DYER
```

Figure 6-22.   List Locations Stanza

WebVoyáge checks to see that the members of the list actually exist, that is, they must be defined in Database Definitions in System Administration see .

If not defined, the group name is not visible on the **Select Database** page in WebVoyáge. The list may contain only Voyager or Z39.50 databases. The list may not contain codes that are other groups.

NOTE:
The contents of this stanza does not display in WebVoyáge. The databases listed in this stanza can only be searched as a group by selecting the group name from one of the lists on the **Select Database** page. Only the group name displays in WebVoyáge, not the individual search locations. If you want to be able to search a database(s) individually, you must enter the database code(s) in a [Set Name] stanza.

In WebVoyáge, the group name displays but the contents of the group do not (see Figure 6-23).
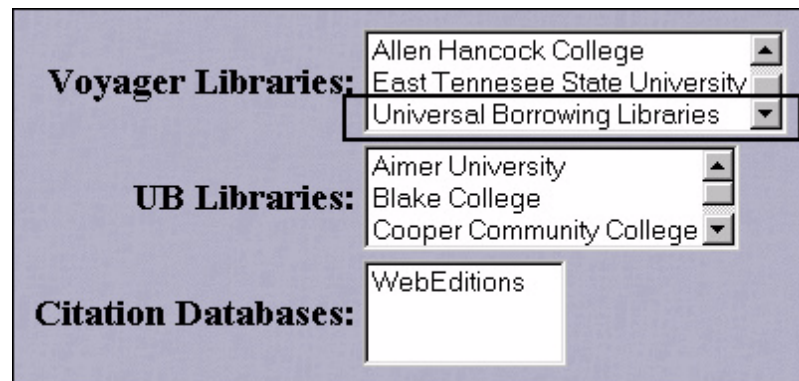
Figure 6-23.   [List Location] Stanza (not displayed directly) in WebVoyáge

When configured in this manner, patrons choose Universal Borrowing Libraries to search the Aimer, Blake, Cooper, and Dyer databases simultaneously. If a patron wanted to search only the Aimer and Cooper databases, they could select them from the UB Libraries list. For more information on the [List Location] stanza, see the *Voyager WebVoyáge User's Guide*.

For more information on the connect.ini file, see the *Voyager WebVoyáge User's Guide*.

*.htm and Image Files

The *.htm files are used by WebVoyáge for a variety of reasons and in a variety of different circumstances. Some *.htm files contain error, assistance or block messages that are displayed when necessary. Some *.htm files correspond to

pre-built individual context-sensitive help pages that display when a user clicks the **Help** button on any page within WebVoyáge; some contain general information that is used on a number of pages in WebVoyáge; and some `*.htm` files correspond to other pre-built pages that can be connected to through buttons on the WebVoyáge tool bars or the WebVoyáge introduction page. You can modify or delete everything in the `*.htm` files.

Error, Assistance, and Block Messages

The following `*.htm` files correspond mainly to error, assistance, or block messages that display when errors occur within the contents of other pages within WebVoyáge.

Many of these messages are related to the patron reaching maximum limits defined in the UB policy definitions. These are specific to Universal Borrowing.

You can modify or delete everything in these `*.htm` files, including changing the text, the font size or color, and the position.

You can include anything in the `*.htm` files, including Java/JavaScript (and VBSCRIPT with 20 lines of text maximum).

⚠️ **IMPORTANT:**
Do not include <BODY>, <FORM>, </FORM>, or </BODY> tags because WebVoyáge provides these when the pages are dynamically built.

Each line in these files must not be longer than 80 characters and each file may contain no more than 20 lines.

In addition, you cannot change where these messages display on the built WebVoyáge pages. Use standard HTML codes to modify these files.

The files are located in the `/m1/voyager/xxxdb/etc/webvoyage` subdirectories (`/local`, `/Z3950`, `/vcit`, and `/zcit`).

NOTE:
There are many other `*.htm` messages that can be configured for WebVoyáge. For more information see the *Voyager WebVoyáge User's Guide.*

Table 6-5 lists the `*.htm` message used in Universal Borrowing.

Table 6-5.   *.htm Messages for Universal Borrowing

File Name	Default Message
`ubb_addr.htm`	Your Patron Initiated Universal Borrowing Request failed. Your patron record address is invalid.
`ubb_citems.htm`	Your Patron Initiated Universal Borrowing Request failed. You have reached your maximum number of charged items.
`ubb_cret.htm`	Your Patron Initiated Universal Borrowing Request failed. You have reached your limit for claims returned items.
`ubb_dupl.htm`	Your Patron Initiated Universal Borrowing Request failed. You already have a Universal Borrowing or Call Slip request for this item.
`ubb_fines.htm`	Your Patron Initiated Universal Borrowing Request failed. You have reached your maximum fine limit.
`ubb_limit.htm`	Your Patron Initiated Universal Borrowing Request failed. You have placed the maximum number of Universal Borrowing requests.
`ubb_lost.htm`	Your Patron Initiated Universal Borrowing Request failed. You have reached your limit for lost items.
`ubb_odue.htm`	Your Patron Initiated Universal Borrowing Request failed. You have reached your limit for overdue items.
`ubb_paging.htm`	Your Patron Initiated Universal Borrowing Request failed. This item is located at the library where you intend to pick it up. You are not permitted to use universal Borrowing to request an item that can be borrowed directly from the pickup library.
`ubb_pexp.htm`	Your Patron Initiated Universal Borrowing Request failed. Your patron record has expired.
`ubb_policy.htm`	Your Patron Initiated Universal Borrowing Request failed. You are not authorized to place a Universal Borrowing request for this item.
`ubb_shelf.htm`	Your Patron Initiated Universal Borrowing Request failed. You have reached your limit for self-shelved items.
`ubb_unavail.htm`	Your Patron Initiated Universal Borrowing Request failed. This item is not available for Universal Borrowing requests.
`ubnoitems.htm`	There are not items available to satisfy your Universal Borrowing Request or your borrowing privileges may have been suspended. Please check your patron information page to be sure you have no outstanding fines or fees.

Help Pages

Each page within WebVoyáge has a corresponding help page that can be displayed by clicking the **Help** button or Help link text. The `ubrequest.htm` file corresponds to a pre-built individual context-sensitive help page that displays when a user clicks the **Help** button or Help link text from the UB Request page in WebVoyáge. You can modify or delete everything in this file. Help files are located in the `/m1/voyager/xxxdb/webvoyage/html/help` directory.

Table 6-6 lists the Help page for Universal Borrowing.

Table 6-6. Help Page .htm File for Universal Borrowing

File Name	Description
`ubrequest.htm`	Universal Borrowing help page.

NOTE:
There are many other help pages which can be configured for WebVoyáge. For more information, please see the *Voyager WebVoyáge User's Guide.*

Image Files

You can customize many of the images within WebVoyáge. The `/m1/voyager/xxxdb/webvoyage/html/images` directory initially contains all of the image files as they are distributed. You can substitute your own `*.gif` files for the `*.gif` files that Ex Libris provides. However, you must give the substitute `*.gif` file the exact same name as the original `*.gif` file.

Table 6-7 table lists the image file for Universal Borrowing that is contained within the above mentioned directory. The Up prefix means it is the image of a button in its raised, unpressed or available state.

Table 6-7. Image File for Universal Borrowing

File Name	Description
`UpLocalDB.gif`	Button that connects you back to the local database after a simultaneous search or UC search.

NOTE:
There are many other image files which can be customized for WebVoyáge. For more information, please see the *Voyager WebVoyáge User's Guide.*

Placing UB Requests in WebVoyáge

A UB Request is a request to send an item that belongs to a Circulation Cluster other than the patron's home Circulation Cluster, to a patron-designated <u>pickup location</u>. When picked up and charged it is a UB Charge.

⚠️ **IMPORTANT:**
UB Requests must be made in WebVoyáge, they cannot be made using the Circulation module.

Patrons place requests for items that belong to another Circulation Cluster, be they within the database or in another Voyager database in WebVoyáge using the UB Request form (see <u>Figure 6-24</u>).

Figure 6-24.   UB Request Form

The UB Request form lists:

- Title of the item
- Instructions on how to complete the request form
- **Library** drop-down list and list of clusters that hold the item

- [Patron] **Barcode** field

- **Comment** field

- **Pick Up Library** drop-down list from the list of available clusters

- **Pick Up At** drop-down list, a list of pickup desks for the Pickup Library selected

- **Not needed After** field

See OPAC Configuration - Request Forms work space on page 5-2 for more information.

Process of Making a UB Request

There are several steps the patron and the system take when making a UB Request.

It is important to note that regardless of the path the patron takes to make the request, that is, a single remote connection, a simultaneous search across multiple databases, or using a Universal Catalog, there is no difference in requesting functionality.

1. The patron searches for an item in WebVoyáge. This search returns items that belong to every Circulation Cluster in the databases searched.

2. To begin the request process the patron must log in to the system. To do this they can either click the **Login** button to bring up the **Patron Login** screen, or they can click the **Request** button which also brings up the **Patron Login** page (see Figure 6-25).

Figure 6-25. Patron Login Screen

The patron logs in to WebVoyáge, selecting a Home Library that contains either their parent patron record or a stub/child patron record. See the *Voyager WebVoyáge User's Guide* for information on logging in.

3. The user selects the UB Request (or whatever it is named at the site) from the drop-down list (see Figure 6-26).

Figure 6-26.   Selecting UB_Request from the Drop-down List of Request Types

The Type of Request options are created after determining all of the available requests. To do this the system takes the following behind the scenes actions.

- Since the patron has logged on, the system retrieves their home patron information, including the patron group to which they belong.

- Using this patron group information, for each item's Circulation Cluster, the system determines the patron group into which the patron should be mapped based on the settings in the item's Circulation Cluster's Patron Group Mapping.

    - If there is only one item, and it's in a Circulation Cluster where the patron must be manually mapped, the UB Request form is not available.

    - If there are multiple items from multiple Circulation Clusters and the patron selects an item on the UB Request form for which they must be manually mapped, they cannot make the request.

    ⚠ **IMPORTANT:**
    If the patron cannot be automatically mapped they will not be able to make a UB Request. A message will display stating their request failed.

- Using the mapped patron group information and the item type, the system applies the appropriate Circulation Policy Matrix and determines for which requests the patron is eligible. That is, if the **Charge/Renew** check box is checked on this matrix.

    If the patron is eligible for at least one request, the system displays a drop-down list of the system request types the patron can make and how many of each type remain.

If the patron has no requests available to them, the message `You have no requests available on this database` displays.

If the patron's home cluster was included in their search, then other forms, in addition to UB Request form are available.

To make a UB Request, the patron then selects the UB_Request type and the UB Request form opens (see Figure 6-27).

Figure 6-27. UB Request Form

4. To generate the information in the **UB Request form** drop-down lists, the system does the following.

   a. Determines the contents of the **Library** drop-down list.

   The system finds all the Circulation Clusters for all the items linked to the bibliographic record.

   b. Determines the contents of the **Item** drop-down list.

   These are the requestable items from the cluster selected in the **Library** drop-down. It displays the barcode, location, and enumeration/chronology information, of the items the user can select.

    c. Determines the contents and ordering of the **Pick Up Library** drop-down list. By default, the pick-up location information contains the following:

        1. A list of all of the Circulation Clusters with whom the cluster does business.

        2. It lists the patron's home Circulation Cluster first (if valid pickup location), followed by other clusters in alphabetical order.

NOTE:
The default setting of the **Pick Up Library** drop-down menu is determined by the availability of the home cluster and the setting of the `SupplyDefaultPickupLocs` key in the `[UB_Page]` stanza of the `opac.ini` file. For more information, see <u>Controlling the Default Pickup Location Selection</u> on <u>page 6-18</u>.

    d. Determines the contents and ordering of the **Pick Up At** drop-down list.

    This alphabetical list contains all circulation desks for the Circulation Cluster selected in the **Pick Up Library** drop-down list that have the **Pickup Location** check box checked in System Administration. See the *Voyager System Administration User's Guide* for more information.

5. The patron completes the appropriate information on the UB Request form and submits the request. At the time of submission the system does the following.

- The system looks for the patron's stub patron record (the one that belongs in the Circulation Cluster that the item is being requested belongs to) and makes a UB Request.

- If the system does not find a stub record, the system automatically creates one based on the Patron Group Mappings in the item's Circulation Cluster and makes the UB Request.

  Also at this time the patron's home Circulation Cluster is contacted and their patron record accessed.

- The system checks for block conditions. If none are found the request is placed. If a block condition exists the request cannot continue.

- If there was a stub, its information is updated. If a new stub patron record is created it uses the information from the parent patron record.

- The system places the UB Request in the appropriate Call Slip Queue, the one that is associated with the item, as defined by the Call Slip Rules set in the System Administration module. See Call Slip Print Groups on page 7-3 for more information.

If the request was placed, the message `Your Patron Initiated Request was Successful` displays.

After successful submission, if the patron views their Patron Information page in WebVoyáge, the request is listed as pending in the Request Information section.

NOTE:
The system only allows the patron to make one request during a single request operation. If additional requests need to be made the patron must begin the requesting process again.

6. The UB Request is processed through the Call Slip module at the item's Circulation Cluster. The item's status is updated to In Transit on Hold, and routing information is exchanged between the Circulation Clusters. Once the item arrives at the destination pickup desk, it is discharged and placed on the hold shelf. The On Hold status is applied and a message is sent to the requesting patron that the item is available.

If the patron were to view their patron information page in WebVoyáge, it would now list this request as available in the Request Information section.

Call Slip Configuration and the Call Slip Dæmon

7

Introduction

UB requested items are routed to the pickup library using the Voyager Call Slip module.

Traditionally, call slips are used to retrieve items located in areas closed to the public. For example, a patron would place a call slip request for an item in closed stacks, the call slip would print out at a circulation desk, a staff member would retrieve the item and hold it for the requesting patron.

The same type of functionality exists for Universal Borrowing. A patron places a UB Request, a UB routing slip is printed at a circulation desk at the Holding library, a staff member retrieves the item and sends it to the Pickup library. If the Holding library's system has been configured to accept UB Requests when they are also the Pickup library <u>Circulation - Miscellaneous Work Space</u> on <u>page 4-32</u>, the item is held at a circulation desk for pickup.

When setting up your UB routing system consider these factors:

- which circulation happening locations are responsible for printing UB routing slips and, at which locations in your library do UB eligible items live
- how soon you want requests to be archived and expired
- what types of no-fill reasons do you want to create for UB requested items

This chapter discusses the configuration of:

- Call Slip Print Groups

- Call Slip Queues
- Call Slip Rules
- No-Fill reasons
- Running the Call Slip Dæmon.

Security

Depending on your security profile, you may or may not be able to access the **Call Slips** work spaces. Operators that have the **System-wide** check box checked on the **Profile Values** tab in the **Security - Master Profiles** work space in the System Administration do have access to these work spaces and can create and edit Call Slip print group information (see Figure 7-1).
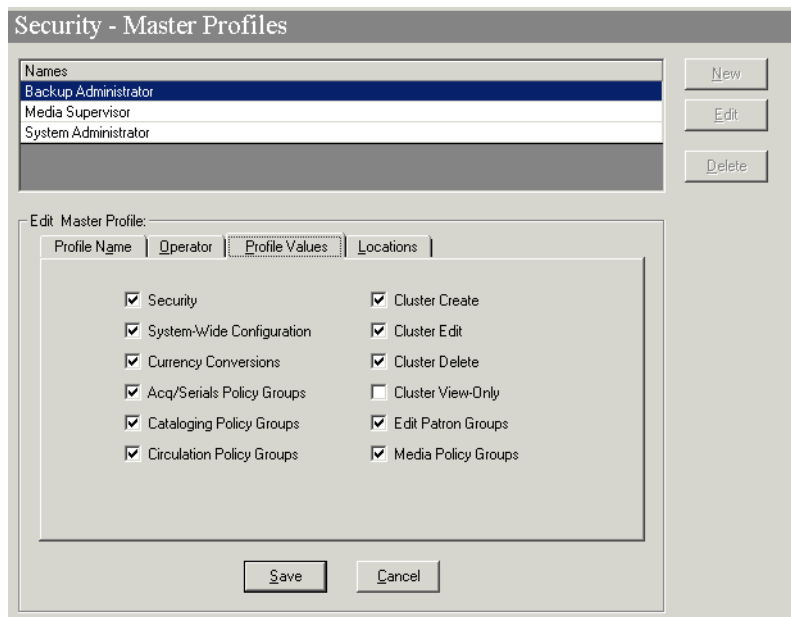
Figure 7-1.   System-wide check box

See Master Security Profiles in the *Voyager System Administration User's Guide* for more information.

Call Slip Print Groups

The Call Slip Dæmon queues the UB Requests that are sent to the Voyager Call Slip module.

In the System Administration module, you can create rules that specify where messages are to be directed depending on what the request is for.

- For regular call slips you would set up print groups for the closed stacks areas in your library.

- For UB, you must set up print groups for any circulation happening location which is responsible for processing UB Requests. You must also specify which holdings locations (as defined in the Holdings record attached to the bibliographic record) belong to which print groups.

For example, if you have two separate circulation desks which are processing UB Requests, one in the undergraduate library and another in the graduate library, you can make a rule that all UB Requests for items in the graduate library be directed to the Graduate print group and another rule stating that all requests for items in the undergraduate library be directed to the Undergrad print group. When UB Requests are submitted, the system routes them to one call slip print group or the other depending on which rule applies.

Setting up Call Slip Print Groups occurs in the **Call Slip Queues**, **Call Slip Rules** and **No-Fill Reasons** work spaces.

- The **Call Slip Queues** work space is where you create the Call Slip Print Groups and add general information about what happens to messages sent to the group.

- The **Call Slip Rules** work space establishes what kinds of requests are routed to each print group defined in Call Slip Print Groups Definition.

- The **No-Fill Reasons** work space lets you create reasons explaining why a UB Request is not able to be filled.

Call Slip Queues

The **Call Slip - Queues** work space allows you to create new UB Call Slip Print Groups and add general information for each group. You can set up the group name and code and specify information such as what happens when the message is processed and when messages should expire or be archived.

The **Call Slip - Queues** work space contains the **Group** tab and the **Values** tab. The **Group** tab allows you to create new UB call slip groups and edit or delete existing groups and the **Values** tab lets you provide information about the UB call slip group.

Procedure 7-1. Creating a New UB Call Slip Queue

Use the following to create UB call slip queues in the Voyager System Administration module.

1. In the Voyager System Administration module, select **Call Slips** from the listbar, and click the **Queues** button.

   Result: The **Call Slips - Queues** work space opens.

2.

If you are...	Then
creating a new Queue	1. Click the **New** button.

   Result: The **New Queue** section displays (see <u>Figure 7-2</u>).

editing an existing Queue	1. Select the Queue 2. Click the **Edit** button.

   Result: The **Edit Queue** section displays.

Figure 7-2. New Queue section, Group tab

3. On the **Group** tab, enter the code you want to use for the group in the **Code** field.

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4. Enter a name for the group in the **Name** field.

5. Check the **Default** check box to make the queue the default call slip queue.

6. Select the **Values** tab.

   Result: The **Values** tab displays (see Figure 7-3).

Figure 7-3.   Values tab

7. In the **Processing Code** block, there are three radio buttons for different actions that can be applied when a UB Request is processed in the Call Slip module.

   For Universal Borrowing, you must select the **In Transit For Hold to dest. location** radio button.

   Result: This applies the In Transit For Hold item status to the item after it is processed as filled in the Call Slip module. When it arrives at the Pickup library, staff discharges the item and place it on the hold shelf.

8. In the **Location** field, choose the location which is responsible for printing and retrieving UB items for this print group.

9. Because Universal Borrowing requires all items to have an existing item record(s), the Default Item type is not applicable. As a result, you can choose any item type as a default because you won't create any items records for UB Requests in the Call Slip module.

10. Enter a number in the **Archive Period** field and change the units drop-down in order to set the length of time that filled, not filled, or expired requests are displayed in WebVoyáge. This period sets the amount of time that the requests display in WebVoyáge.

After this length of time has elapsed, the requests are archived by running circulation batch job 8, Archive and Expire Call Slip Requests.

If this is set to 0, expired requests are archived immediately after running circjob 8. See Archive and Expire Call Slip Requests (Circjob 8) on page 8-3 and the *Voyager Technical User's Guide* for information on this batch job.

11. Enter a number in the **Expire Period** field and choose a unit of measurement from the drop-down list.

This sets the length of time that must pass before a UB Request that is not processed or marked with a no-fill reason is assigned a status of Expired after running circulation batch job 8, Archive and Expire Call Slip Requests. See Archive and Expire Call Slip Requests (Circjob 8) on page 8-3 and the *Voyager Technical User's Guide* for information on this batch job.

If the Expire Period is set to 0, requests never expire.

After a request has expired, it will no longer be available to be filled.

You *can* set the Archive Period to display the request history in WebVoyáge, even after the request has expired due to the Expire Period being completed.

⚠ **IMPORTANT:**
An Expired Period of 0 and an Archive Interval of 0 indicate settings at opposing ends of the interval spectrum. To avoid confusion, remember that these two periods control two different functions. An Expire Period of 0 designates the request as being available to fill indefinitely, while an Archive Period of 0 will remove the request history from display in WebVoyáge as soon as Circjob 8 is run.

The **Set circulation review status on new item** and the **Set cataloging review status on new items** check boxes are related to creating item records and do not apply to Universal Borrowing.

12. Select the **Include patron info in call slip display** check box to determine whether you want to include the patron's name and barcode in the display window of the Call Slip module.

13. Click the **Save** button to save this information. Click the **Cancel** button to close without saving.

    Result: If saved, the Call Slip Queue is created.

Call Slip Rules

Call Slip Rules tell Voyager where certain kinds of UB Requests are to be routed. Call Slip Rules link a Call Slip Print group with a holdings location as well as items:

- with a particular call number type
- within a range of call numbers
- published between certain dates
- at a certain location
- of a certain type

If a UB Request matches a particular rule, it is routed to the Call Slip Print Group selected for the rule.

Call Slip Rules are listed and applied in order of importance. If there is a rule which should take precedence over another, it must display earlier in the list.

An item record must match exactly all of the details specified for the rule in order for the rule to apply to that record. When an item record matches a rule, then the record is sent to the call slip print group specified in the rule. If a record matches none of the rules, then it is sent to the default print group specified in the **Call Slips - Queues** work space (see Call Slip Queues on page 7-3).

Procedure 7-2. Adding or Editing a Call Slip Rule

Use the following to add or edit a Call Slip Rule.

1. In the Voyager System Administration module, select **Call Slips** from the listbar, and click the **Rules** button.

    Result: The **Call Slips - Rules** work space opens (see Figure 7-4).
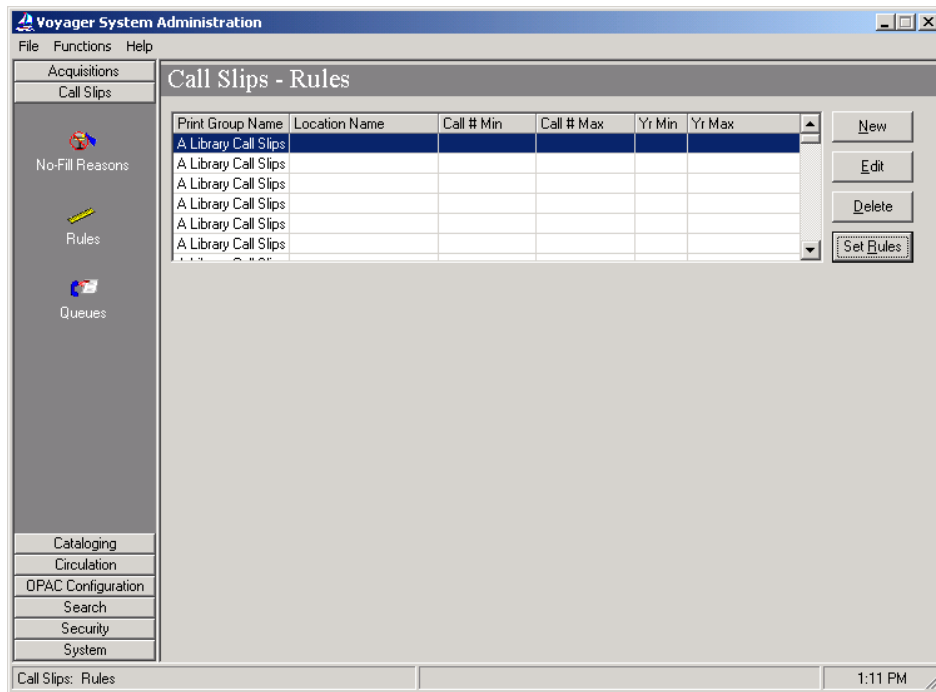
Figure 7-4. Call Slip Rules dialog box

2.

If you are...	Then...
Adding a new rule	1. Click the **New** button

Result: The **New Rule** section displays (see Figure 7-5).

Editing an existing rule	1. Select the Rule
	2. Click the **Edit** button

Result: The **Edit Rule** section displays.

Figure 7-5. New Rule

3. In the **Print Group** field, click the drop-down arrow to select the print group where the message is to be routed.

4. In the **Holdings Location** field, click the drop-down arrow to select a location. The list includes all the locations defined in **System Administration**> **System**> **Locations**. The Call Slip Rules apply to all items linked to a holdings record to which this location is associated.

> ⚠ **IMPORTANT:**
> *You must create a rule for all of your locations from which items can be borrowed with UB.*

For example, if you have defined 30 locations in System Administration, and 20 of those locations have UB eligible items, you must create 20 call slip rules, one for each location.

Result: The minimum settings for Call Slip rules are configured.

NOTE:
The preceding steps provide the minimum setup required for Call Slip Rules to apply to UB Requests. The remaining steps are optional and should only be set if you need to be more specific about the items that may be requested with a UB Request.

OPTIONAL:

5. *You can apply the rule only to holding records that have call numbers within a certain range, or to any holding records that have call numbers above or below a particular number. In the **Call Number Type** field, click the drop-down arrow to select a call number type then enter the lowest call number in the range in the **Call Number Minimum** field and the highest call number in the range in the **Call Number Maximum** field. Either one can also be left blank, but if either is used, you must select a call number type.*

For example, if all of the LC call numbers in the K's should be selected for a rule, enter LC as the call number type, a Call number minimum of K, and a call number maximum of L. If the collection is split at a more arbitrary point, such as the first book at the second location has call number LB101.A323, you may have two rules, one with a minimum of A and a maximum of LB101.A323, and a second with a minimum of LB101.A323 and no maximum entered.

NOTE:

When deciding what holding records fall under a certain rule, Voyager looks for holding records with call numbers equal to or greater than the number entered into the **Call Number Minimum** field and less than (but **not** equal to) the number in the **Call Number Maximum** field.

OPTIONAL:

6. *Click the drop-down arrow in the **Item Location** field to select the location where the item must be stored for the rule to apply. This is the permanent location defined in the item record.*

OPTIONAL:

7. *Click the drop-down arrow in the **Temporary Location** field to select the location where the item must be temporarily stored for the rule to apply.*

This is the temporary location defined in the item record. If both Item Location and Temporary Location are set, the item record must match *exactly*, that is, both locations must be defined in the item record to match the call slip rule.

If you have some items permanently located and some temporarily located in a holdings location, and you want to route all of these to the same place, you need two rules, one for items located permanently in closed stacks and one for items located temporarily in closed stacks, and route them both to the same print group location.

Adding one rule that lists both temporary and permanent locations as closed stacks does not do the same thing.

NOTE:
If you select a Holdings, Item, and Temporary location for your Call Slip Rule then the item is required to match on all three locations in order for the rule to apply.

OPTIONAL:
8. *Click the drop-down arrow in the **Item Type** field to select the type of item to which this is to be applied.*

If you specify a holdings location that includes many item types, (for example, Main) you can use the **Item Type** field to further specify which items at the Main location match the call slip rule. You have to define separate rules for different item types, however. For example, you would create multiple rules using UB Routing/Main for the call slip print group and Holdings Location combination. Then use Item Type to specify Book, Video, Microform, or any other item type.

OPTIONAL:
9. *Click the drop-down arrow in the **Temporary Item Type** field to select the temporary item type to which this is to be applied. The same issues apply as for Item Location and Temporary Location.*

OPTIONAL:
10. *Select a minimum year and/or a maximum year for the item in the **Minimum Year** and **Maximum Year** fields to limit a call slip rule by publication date. One or both years may be entered. When deciding what records fall under a certain rule, Voyager looks for any date matching or greater than the Minimum Year and matching or less than the Maximum Year.*

The date that Voyager is examining is actually the contents of the year field as it is fed directly from the item record. It is a 20 character alphanumeric string and is useful for serial collections where older issues may be sent to storage by date. It must exactly match the beginning of the number entered in the fields.

Voyager sequentially compares each letter in each string in the date field in the records. If a record has a date of 1965, and the minimum date is 1965, it is considered a match because each record contains the same exact string of text (the "1965" part). If the date in the record is 1965-66, or even 19657648, it is a match. If the date in the record is 65, however, it is not recognized as a match.

11. Click the **Save** button to save your changes, or click the **Cancel** button to close the dialog box without saving your changes.

Result: The Call Slip Rule has been created.

The Order of Call Slip Rules

Call Slip Rules are listed and applied in order of importance. If there is a rule which should take precedence over another, it must display earlier in the list.

Voyager applies each rule one at a time to a request in the order provided. Voyager starts its sorting by reading the first rule and deciding whether it applies, and if it does not, moves on to the next rule until it finds a rule that applies.

It is possible for a number of rules to apply to the same item, so in order to make sure that the right rule gets applied over certain other rules, you may need to move rules up or down in the list to set priorities. A rule-of-thumb is to list specific rules before broader rules.

For example, the first call slip rule in the order could include a holdings location and a call number range, followed by a second call slip rule including just a holdings location. When a request is compared to the rules, Voyager tries to match the request to the specific rule first and then the second, more generic rule. If the generic rule was first on the list, all requests would match.

Procedure 7-3. Setting the Order of Call Slip Rules

Use the following to order Call Slip rules.

1. In the Voyager System Administration module, select **Call Slips** from the listbar, and click the **Rules** button.

   Result: The **Call Slips - Rules** work space opens.

2. Click the **Set Rules** button.

   Result: The **Sort Call Slips - Rules** dialog box opens (see).
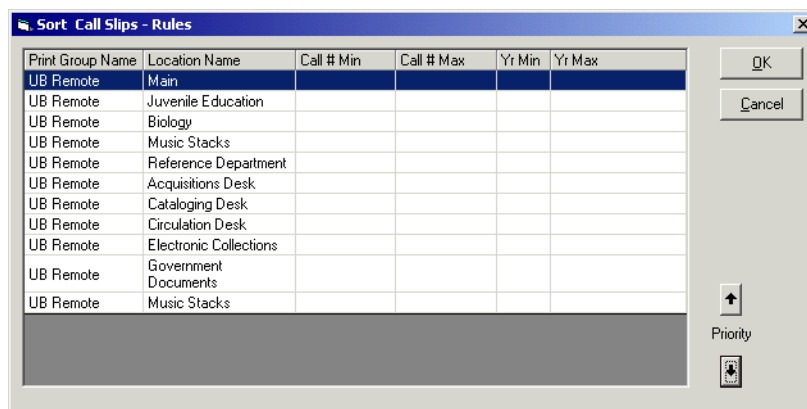
Figure 7-6.   Sort Call Slips - Rules dialog box

3. Highlight the rule you want to move and use the priority arrows to move it up and down the list.

4. Click the **OK** button to save the new order, click the **Cancel** button to close without saving the new order.

   Result: If clicked **OK**, a new sort order is established.

No-Fill Reasons

The **Call Slips - No-Fill Reasons** work space allows you to create reasons to be used in the Call Slip module when processing requests. When a request cannot be filled, the operator must select a reason as to why it cannot be filled. Any reason that displays on the drop-down list in the Call Slip module comes from this list. You must have a minimum of one No-Fill Reason.

Table 7-1 describes the No-Fill Reasons fields.

Table 7-1.   No-Fill Reasons fields explanation

Option	Description
Code	Enter a unique name up to 10 characters in length that identifies the No-Fill Reason. Making the first letter of the code unique enables the call slip operator to select the code by keying only the first letter.

Table 7-1.   No-Fill Reasons fields explanation

Option	Description
Description	Enter a description up to 40 characters in length of the No-Fill Reason. The **Description** displays in WebVoyáge to inform the requester why the call slip request was not filled.
Suppress	Select this option to prevent the No-Fill Reason from displaying is the list of reasons from which the call slip operator makes a selection. **NOTE:** No-Fill Reasons may not be deleted if they are in use. Use the **Suppress** option to keep the No-Fill Reason from displaying in the list of No-Fill Reasons from which the call slip operator selects.

Procedure 7-4.   Creating No-Fill Reasons

Use the following to create a No-Fill reason.

1. In the Voyager System Administration module, select **Call Slips** from the listbar, and click the **No-Fill Reasons** button.

Result: The **Call Slips - No-Fill Reasons** work space opens (see Figure 7-7).
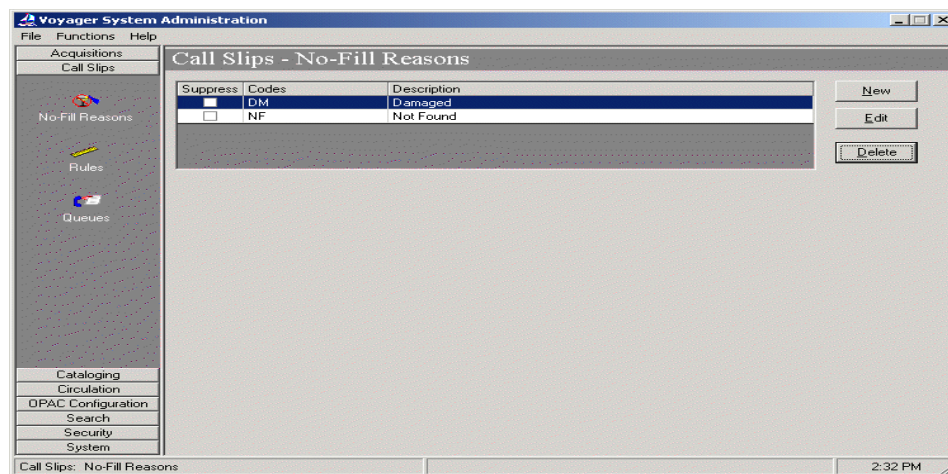
Figure 7-7.   Call Slips - No-Fill Reasons work space

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2.

If you are...	Then...
Adding a new reason	1. Click the **New** button

Result: The **New No-Fill Reason** section displays (see Figure 7-8).

Editing an existing reason	1. Select the Reason 2. Click the **Edit** button

Result: The **Edit No-Fill Reason** section displays.
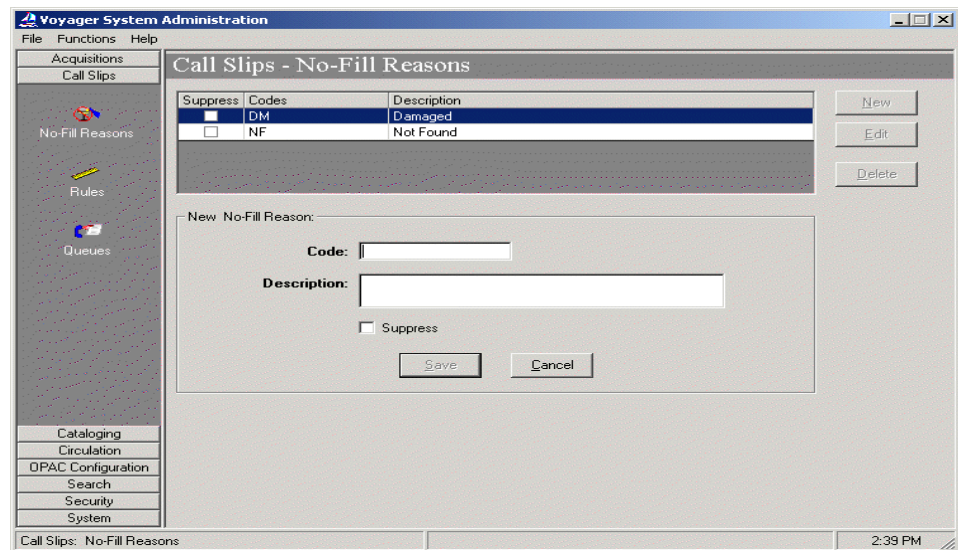
Figure 7-8.   No-Fill Reasons options

3. Enter the code in the **Code** field.

4. Enter the description of the reason in the **Description** field.

5. Check the **Suppress** check box, if wanted.

6. Click the **Save** button to save your changes, or click the **Cancel** button to close without saving your changes.

Result: The No-Fill Reason is created.
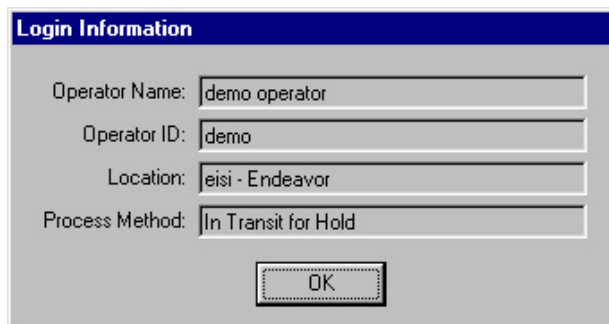
The Call Slip Dæmon

The Voyager Call Slip Dæmon is used to print Universal Borrowing routing slips as well as traditional call slips. Staff can distinguish between the two types of slips by checking the text in the heading of the slip. Staff is also alerted to a UB Request through a pop-up note that displays when the request is processed. You can configure both kinds of slips.

The Voyager Call Slip Dæmon contains a **Pending** tab and a **History** tab. The **Pending** tab displays a list of current requests that have been placed by patrons through WebVoyáge for items located at Holding library. The **History** tab displays a list of requests that have been processed during the current Call Slip session.

NOTE:
After logging in, access the **Login Information** dialog box, the **Process Method**, defined when creating the Call Slip Queue, must be In Transit On Hold (see Figure 7-9). For more information see .

Figure 7-9.   Login Information dialog box

Retrieving Pending Requests (Pending Tab)

A list of new pending requests is automatically retrieved and placed on the **Pending** tab whenever you login to the Call Slip Dæmon. To retrieve new requests after you have logged in, select **Get Requests** from the **File** menu. This queries the server and returns a list of all new pending requests that have been placed by patrons in WebVoyáge and displays on the **Pending tab**. The **Get**

Requests function is useful for making sure that the displayed list of pending requests is the most up-to-date. Two numbers display on the top left corner of the **Pending Item Information** list box on the **Pending** tab. The first number is the total amount of requests on the **Pending** tab. The second number is the total amount of requests that have not yet been printed. For example, if the two numbers were 3/1, there would be three total requests on the **Pending** tab, one of which would be a request that has not yet been printed.

When the **Update Interval** (specified in Preferences) elapses, the server is automatically queried for new pending requests and a list of all new pending requests is returned to the **Pending** tab. How you set this interval depends on the number of requests you process and your procedures. See the *Voyager Call Slip Dæmon User's Guide* for more information.
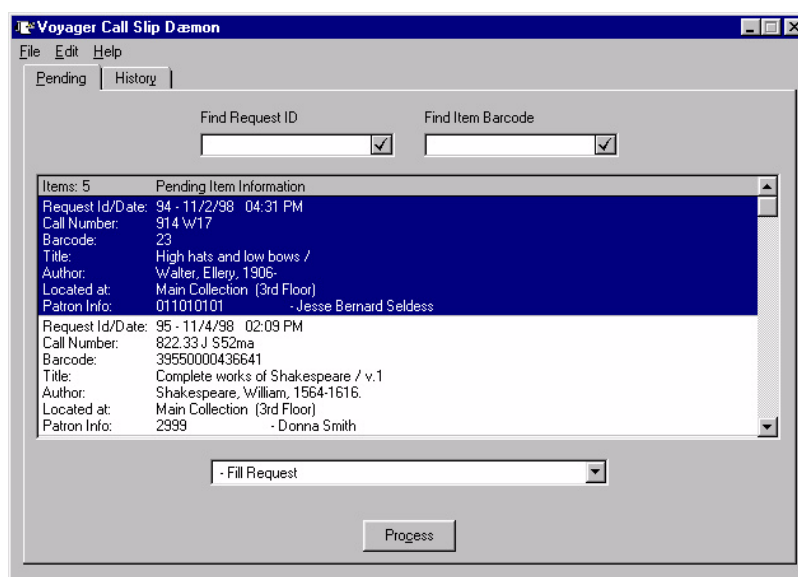
Figure 7-10.   Call Slip Dæmon - Pending Tab

Processing a Pending Request

A request may be processed whether it has been printed or not. When a request is processed from the **Pending** tab, the request is either filled or not filled.

What it means to fill a pending request may vary depending on what Call Slip Print Group your Call Slip module is directed towards, and how that Call Slip Print Group has been configured in the System Administration module.

When you process a request but do not fill it, you assign the request a No-Fill Reason, for example, Damaged Materials or Not Found (see Call Slip Print Groups on page 7-3 for more information).

The request is moved from the **Pending** tab to the **History** tab.

The **History** tab displays all of the requests that you have processed during your current Call Slip session. Once you end your current Call Slip session, these requests no longer display on the **History** tab. Also on the **History** tab, you can use the **Unprocess** button to unprocess requests that you have processed during your current Call Slip session.

Changing the Item to which the Request is Linked

Universal Borrowing requires an existing item record before a patron can submit a successful UB Request. As a result, the option to link a UB Request to a newly-created item is not available. However, the **Link Item** dialog box also displays any time you attempt to process and fill a request if you have checked the **Force Item Search on Process** check box in your **Preferences**. In this case you can change the item to which the request is linked.

For example, if a new request comes into Call Slip associated with a particular item, and you want to link the request to a different item (for example, copy 1 was requested but only copy 2 is available), you can override the item that it is associated with by linking the request to a different item. The request is then processed as linked to the newly chosen item.

Also, it is possible for a request to be linked to an existing item that does not have a barcode. You can add a barcode to such an item before processing the request.

All UB items are required to have a barcode assigned to them in order to be discharged at the pickup library. If a patron requests an item for UB and the item does not have a barcode, a barcode must be added to the item before it is shipped to the pickup library.

See the *Voyager Call Slip Dæmon User's Guide* for more information.

Displaying Processed Requests (History tab)

From the **History tab**, you can:

- view the list of requests that you have processed during your current Call Slip session
- unprocess requests that you have processed during your current Call Slip session

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Unprocess a Request

There are numerous reasons why you may want to unprocess a request that you have processed during your current Call Slip session.

You may have processed the wrong request, processed a request with the wrong No-Fill reason, or linked a request to the wrong item.

See the *Voyager Call Slip Dæmon User's Guide* for more information.

The Callslip.ini File

The Voyager Call Slip Dæmon initialization file, `callslip.ini`, is located in the `/misc` directory on the local computer.

NOTE:
Your library may have customized the name of the main directory under which Voyager resides.

The `callslip.ini` file contains several stanzas:

- `[General]`
- `[Preferences]`
- `[Print Options]`
- `[Routing Slip Print Template]`
- `[Call Slip Print Template]`

The `[General]`, `[Preferences]`, and `[Print Options]` stanzas do not need to be configured in the `callslip.ini` file itself. These three stanzas directly reflect configurations that you make in the Call Slip module.

The `[Routing Slip Print Template]` and `[Call Slip Print Template]` stanzas determine what specific information prints and how that information displays when an operator prints a Call Slip.

See the *Voyager Call Slip Dæmon User's Guide* for more information.

UB Reports, Notices, and Batch Jobs

8

Introduction

This chapter discusses the Circulation Batch jobs used with Universal Borrowing.

- Standard Circulation Reports and Notices
- Archive and Expire Call Slip Requests (Circjob 8)
- Purge Universal Borrowing (UB) Patron Stub Records (Circjob 29)
- Request Promotion (Circjob 32)
- Update Remote Circulation Cluster Cache (Circjob 33)

Circulation batch jobs related to Universal Borrowing are listed in .

Table 8-1.   Circulation batch jobs and responsible library

Circ-job #	Job Title	Responsible Library
2	Overdue Notices	Holding
3	Recall Notices	Holding
4	Fine/Fee Notices	Holding
5	Hold Recall Available Notices	Pickup
6	Hold Recall Canceled Notices	Pickup
7	Courtesy (Due) Notices	Holding

Table 8-1. Circulation batch jobs and responsible library

Circ-job #	Job Title	Responsible Library
8	Archive and Expire Call Slip Requests	Holding
14	Fine/Fee Statements (all)	Holding
22	Missing in Transit Report	All
24	Transaction Exceptions Report	All
29	Purge UB Patron Stub Records	All
32	Universal Borrowing (UB) Request Promotion	Home
33	Update Remote Circulation Cluster Cache	All

For more information about running batch jobs, adding parameters, and printing reports and notices with the Voyager Reporter module, see the *Voyager Reporter User's Guide* and the *Voyager Technical User's Guide.*

Security

In order to run the various Circulation batch jobs, operators must have access to the `/m1/Voyager/xxxxdb` directory on the server where their Voyager database resides. Some jobs can be run using WebAdmin. See the *Voyager Technical User's Guide* for more information.

Standard Circulation Reports and Notices

Universal Borrowing uses both standard Circulation reports and notices as well as prepackaged reports, see <u>Prepackaged Access Reports</u> on <u>page 9-1</u>.

The responsible Library means the library who, after running the job, prints notices or reports based on UB transactions. For example, Overdue Notices for UB items are printed by the Holding library, that is, the library at which the borrowed item lives.

For example, the Holding library is responsible for Overdue Notices and Fine/Fee Notices while the Pickup library is responsible for Hold/Recall Available Notices.

See the *Voyager Reporter User's Guide* for information on standard reports and notices.

Archive and Expire Call Slip Requests
(Circjob 8)

This batch job archives any requests with the status Processed, Not Found or Expired and changes the status of unprocessed requests to Expired. An expire period of zero would indicate that the request should never expire.

It expires unprocessed requests after the interval specified in the Voyager System Administration module has elapsed. These requests will display in WebVoyáge until the job archives them.

NOTE:
Circjob 8 expires call slip (UB) requests based on two intervals, the Not Needed After interval on the UB Request form and the Expire Period defined in the Call Slip Print Group. When circjob 8 is run, the system checks both intervals and the lower interval expires the request.

For example, if the Not Needed After interval is 30 days and the Expire period is 7 days, the request expires based on the Expire period. Conversely, if the Not Needed After interval is 10 days and the Expire period is 15 days, the request expires based on the Not Needed After interval.

The frequency with which this job should be run depends on the interval your site has set in **System Administration**> **Call Slips - Queues** work space, see Call Slip Queues on page 7-3.

To run the job on your Voyager server, at the `sbin>` prompt, enter

    Pcircjob -j8

The `circjob.log` file should include the day, date, time entry, and possibly the following messages.

> *Thu Mar 21 13:18:13 2002 Archive and Expire Callslip Requests...*
>
> *Thu Mar 21 13:18:14 2002 ...COMPLETED*

NOTE:
This job can be run using WebAdmin. Also, if wanted this job can be set up on a cron.

Purge Universal Borrowing (UB) Patron Stub Records (Circjob 29)

This batch job purges any empty UB patron stub records that exist in the database.

The system looks for patron records in which the Patron ID indicates a UB patron, and then checks for the existence of fines and fees, holds, UB Requests, and charged items. The -f parameter instructs the system to check for historical fines and fees.

If the system finds an empty stub patron record and you did not include the -f parameter, the stub record is deleted from the database. If the system finds an empty stub record and you did include the -f parameter, the system checks for historical fines and fees. If fines ever existed in the stub patron record, the system skips to the next stub patron record. If they never existed, the record is deleted.

Also, operators may use the -m parameter to retain stub records that were manually mapped.

To run the job without parameters, at the `sbin>` prompt, enter

```
Pcircjob -j29
```

To run the job with both parameters, at the `sbin>` prompt, enter

```
Pcircjob -j29 -f -m
```

NOTE:
This job can be run using WebAdmin. Also, if wanted this job can be set up on a cron.

See the *Voyager Circulation Clusters User's Guide* for more information.

Universal Borrowing (UB) Request Promotion (Circjob 32)

If you have configured Universal Borrowing Request Promotion, Universal Borrowing requests (including call slip requests for local UB-eligible patrons) that cannot be filled at one holding cluster will automatically be sent to other holding clusters for fulfillment according to the `promoteXXX.cfg` file.

Sites configure as many `promoteXXX.cfg` files as there are call slip queues. Each call slip queue promotes its own requests to other clusters in the local database or to clusters in remote databases.

This job promotes requests automatically to other clusters, adhering to all existing validation checks for UB requests and cluster mapping rules for the patron in question.

This circjob should be run on the database that wants to promote requests.

NOTE:
The Universal Borrowing Request Promotions circjob takes some time, and is resource-intensive, so choose a suitable time to run it (suitable both to you and your fellow UB partners, whose databases you may be searching, All databases must be up).

This section discusses the UB Request Promotion circulation batch job including:

- The UB Request promotion process
- The `promoteXXX.cfg` file
- Running the job
- Error messages

The UB Request Promotion Process

When you run Circjob 32, Voyager:

Retrieves the list of UB Requests and Call Slip requests for the specified queue, with a Not Filled or Expired status but not past the Not Needed After date.

For each request:

1. If the request is a local callslip request, Voyager checks to make sure that the patron is UB eligible. If not, the request cannot be promoted.

2. If the request is a UB Request, the system makes sure that the request is not sent to the patron's home cluster for promotion or anywhere else it has been.

3. Connects to the first database and cluster listed in the `[DBCODE]` stanza of the `promoteXXX.cfg` file (provided the request hasn't been there).

4. Verifies that the patron can be mapped into the remote cluster, whether local or not. The databases must be UB-enabled, mapping must be configured, and the patron must be UB eligible.

5. Retrieves the first index in the appropriate (`[SERIALS]` or `[MONOGRAPHS]`) stanza.

6. Checks to see if the requested item is a monograph or a serial, depending on the leader code and leader code specifications in the `[MONOGRAPHS]` and `[SERIALS]` stanzas of the `promoteXXX.cfg` file.

7. Searches this index of the database and cluster connected to for an appropriate matching value in a bibliographic record.

- If there is no match found in that index on that database and cluster, the next index in the appropriate stanza of the `promoteXXX.cfg` file is checked.

- If there is no match found on this database and cluster using any of the indexes, a connection to the next database and cluster listed in the `promoteXXX.cfg` file is made. (This can be the same Voyager database, but different cluster).

- If no match is found using all indexes on all databases and clusters, the system goes to the next request and starts the process again. Circjob 32 continues to attempt to promote this request the next time it is run, until the request expires or passes its not needed after date.

- If no match is found for any records, using all indexes, on any database, an error message is written to the log file.

- For each match it finds, it promotes the request.

Promoting a request:

8. Once a match is found for an item, Voyager performs UB patron validation checks, to make sure that the patron is allowed to charge the item (circulation matrix). Also, the item must have a not charged, or discharged item status.

9. The patron validation takes place at the home, UB aggregate, and holding levels.

- If a patron is blocked at the home or UB aggregate level, they are blocked for all items at all participating databases. Voyager will move on the next request.

- If the patron is blocked at the holding cluster (because a stub record for this patron already exists and has fines associated with it, for example) the search is attempted at any remaining databases and clusters. Voyager will begin searching for a matching item in the next cluster.

10. When the patron has passed all verification checks, the request is promoted to the holding cluster. The request is archived at the promoting cluster with the status promoted.

11. The promoted request is an item-less request at the remote cluster. The holding cluster must attach an item barcode to it.

⚠ **IMPORTANT:**
This request is item-less, so the holding library must attach an item barcode to it. For more information see the Voyager Call Slip Dæmon User's Guide.

The promoteXXX.cfg file

`Circjob 32` requires a configuration file named `promoteXXX.cfg`. The `XXX` corresponds to the call slip print group code of the callslip queue promoting the requests. Multiple `promoteXXX.cfg` files may reside on the server for a single database.

This file indicates which databases (and clusters within those databases) to promote callslips and UB Requests, the leader codes used to search for the requested items, and the left-anchored index codes to search by.

Figure 8-1 shows the default `promoteXXX.cfg` file.

```
[DBCODE]  (No default database codes are provided)


[MONOGRAPHS]
a,m
010A
020A
035A


[SERIALS]
b,s
010A
022A
035A
```

Figure 8-1.   Default promoteXXX.cfg file

This file resides in the `/m1/voyager/xxxdb/ini` directory and this is where `Circjob 32` looks for the file. If you move the `promoteXXX.cfg` file, you must enter the full path of the file into the command line to tell circjob where to find the `promoteXXX.cfg` file.

> ⚠ **IMPORTANT:**
> *For Universal Borrowing Request Promotions to be performed, the* [DBCODE] *stanza must contain valid UB database codes and cluster codes, as listed in the promotion database's System Administration module. For more information, see [DBCODE] stanza on page 8-8.*

Figure 8-2 shows a sample `promoteXXX.cfg` file.

```
Line#
  1    [DBCODE]
  2    XSTATEUB,CLUSTER1
  3    UOFXUB,CLUSTER1,CLUSTER2
  4    XCOLUB,CLUSTER1
  5    UOFXUB,CLUSTER4
  6
  7    [MONOGRAPHS]
  8    a,m
  9    010A
 10    020A
 11    035A
 12
 13    [SERIALS]
 14    b,s
 15    010A
 16    022A
 17    035A
```

Figure 8-2.   Sample promoteXXX.cfg file with [DBCODE] stanza

[DBCODE] stanza

The first stanza in the `promoteXXX.cfg` file is the [DBCODE] stanza, providing the database and cluster codes.

The codes of the databases to which the request should be promoted are listed on each line. These codes are established in the promoting database's **Search - Database Definitions** work space of the Voyager System Administration module, see Search - Database Definitions work space on page 3-2.

The database codes are followed by the Circulation Cluster codes of the cluster within the database to which the request should be promoted. These codes are established for each cluster in the promoting database's **Circulation - Cluster Maintenance** work space of the Voyager System Administration module, see the *Voyager System Administration User's* Guide for more information.

List the database and cluster codes of all databases and clusters in the order you want to promote requests to in this stanza. The codes are case sensitive. The databases and clusters are connected to in the order presented in the [DBCODE] stanza.

NOTE:
Use a comma to separate the codes. The system expects the first code to be the database code, followed by cluster code(s)

Sites wanting to promote requests to clusters within their database include LOCAL in the [DBCODE] stanza.

⚠ **IMPORTANT:**
To perform Universal Borrowing Request Promotions, this stanza must contain at least one database and cluster code. All databases listed here must be UB enabled.

Based on the sample [DBCODE] stanza in Figure 8-2, the database corresponding to the XSTATEUB database code, cluster 1 is connected to first. If the request cannot be filled there, UOFXUB is connected to next, checking cluster 1 first, then cluster 2 and so on until either a request has been filled or all databases and clusters in the [DBCODE] stanza have been connected to and all are unable to fill the request.

[MONOGRAPHS] stanza

The next stanza in the promoteXXX.cfg file is the [MONOGRAPHS] stanza. This stanza contains two sections.

- Leader byte 07 position value specification
- Index Specification

Leader byte 07 position value specification

This stanza determines which leader byte 07 values to treat as monographs when searching potential promotion databases for matches (see Figure 8-2). Enter the values of the leader byte 07 position to treat as monographs on the first line of the [MONOGRAPHS] stanza separated by commas.

Only monograph records containing one of the letters specified here are searched for a match with the UB Request being promoted.

NOTE:
To perform UB Request Promotions, this stanza must contain at least one leader value.

Index Specification

This is where you specify which indexes to search for records to match to the UB Request (see Figure 8-2).

NOTE:
To perform UB Request Promotions, this stanza must contain at least one index.

Create a line for each index to search. You may use multiple index codes to search, so an item has more potential match points.

These indexes must be single field, left-anchored indexes. For a list of these indexes, see the *Voyager System Administration User's Guide.*

In the example, the indexes to be searched are:

- `010A`- The LCCN (Library of Congress Card, or Catalog, Number)
- `020A`- ISBN
- `035A`- System Number

[SERIALS] stanza

The next stanza in the `promoteXXX.cfg` file is the `[SERIALS]` stanza. This stanza contains two elements:

- Leader byte 07 position value specification
- Index Specification

Leader byte 07 position value specification

This stanza determines which leader byte 07 values to treat as serials when searching potential promotion databases for matches (see Figure 8-2).

Only serials records containing one of the letters specified here, are searched for a match with the UB Request being promoted.

NOTE:
To perform UB Request Promotions, this stanza must contain at least one leader value.

Enter the values of the leader byte 07 position to treat as serials on the first line of the [SERIALS] stanza separated by commas.

Index Specification

In this stanza. list the indexes to search for records to match to the UB Request (see Figure 8-2).

NOTE:
To perform UB Request Promotions, this stanza must contain at least one index.

Create a line for each index to search for a match to the UB Request record. You may use multiple index codes to search, so an item has more potential match points. Also, select the most unique indexes.

⚠ **IMPORTANT:**
These indexes must be single field, left-anchored indexes. For a list of these indexes (see Table 8-2).

In the example in Figure 8-2 the indexes to be searched are:

- 010A- The LCCN (Library of Congress Card, or Catalog, Number)
- 022A- ISSN
- 035A- System Number

Left-Anchored Index Codes

Table 8-2 contains a list of left anchored index codes that can be used in the promoteXXX.cfg file.

Table 8-2.   Valid Left-Anchored Search Codes (Page 1 of 5)

Search Index	Search Name
010A	LCCN (010a)
010Z	LCCN (010z): Canceled/Invalid
020A	ISBN (020a)
020Z	SBN (020z): Canceled/Invalid
022A	ISSN (022a)
022Z	ISSN (022z): Canceled
024A	Other Std.Ident.(024a)
024Z	Other Std Ident.(024z): Canceled/Invld

Table 8-2.   Valid Left-Anchored Search Codes (Page 2 of 5)

Search Index	Search Name
027A	Std Tech.Rpt No.(027a)
027Z	Std Tech.Rpt No.(027z): Canceled/Invld
028A	Publisher Number (028a)
028B	Publisher Number (028b): Source
030A	CODEN (030a)
030Z	CODEN (030z): Canceled/Invalid
035A	System Number (035a)
035Z	System Number (035z): Canceled/Invalid
0359	Original System Number (0359)
074A	GPO Item Number (074a)
074Z	GPO Item Number (074z): Canceled/Invld
1300	Uniform Title ME <
1301	Uniform Title ME: Title <
1302	Uniform Title ME: Name of Pt <
2100	Title, Key Abbreviated <
2110	Title, Shortened <
2120	Title, Variant Access <
2220	Title, Key <
2400	Uniform Title <
2401	Uniform Title: Title <
2402	Uniform Title: Name of Part <
2450	Title Statement <
2451	Title Statement: Title <
2452	Title Statement: Medium <
2460	Title, Varying Form <
2470	Title, Former <
260D	Music Number (260d)
4000	Series Title: Personal <
4100	Series Title: Corporate <

Table 8-2. Valid Left-Anchored Search Codes (Page 3 of 5)

Search Index	Search Name
4400	Series Title: Title AE <
7300	Uniform Title AE <
7301	Uniform Title AE: Title <
7302	Uniform Title AE: Name of Part <
7400	Uncont. Title AE <
7401	Uncont. Title AE: Name of Part <
7600	Main Series Entry <
7620	Subseries Entry <
7670	Translation (767) <
7720	Parent Record Entry <
7721	Parent Record Entry: Title <
7730	Host Item Entry <
7731	Host Item Entry: Title <
7800	Preceding Title (780t) <
7850	Succeeding Title (785t) <
8000	Series AE: Personal <
8100	Series AE: Corporate <
8300	Series AE: Uniform Title <
8302	Series AE: UT: Name of Part <
100H	Personal Name
110H	Corporate Name
111H	Conference
400H	Personal Name Series
411H	Conference Series
700H	Personal Name AE
710H	Corporate Name AE
711H	Conference AE
800H	Personal Name Series AE
810H	Corporate Name Series AE

Table 8-2. Valid Left-Anchored Search Codes (Page 4 of 5)

Search Index	Search Name
811H	Conference Series AE
6500	Subject: LCSH
6501	Subject: Children's LCSH
6502	Subject: MESH
6503	Subject: NAL
6504	Subject: Unspecified
6505	Subject: Canadian English
6506	Subject: Canadian French
6507	Subject: Other
600H	Subject: Name
610H	Subject: Corporate
611H	Subject: Conference
630H	Subject: Title
651H	Subject: Geographic
654H	Subject: Faceted
655H	Subject: Genre/Form
022Y	ISSN (022y): Incorrect
2140	Title, Augmented <
4110	Series Title: Conference <
8110	Series AE: Conference <
8301	Series AE: UT: Title <
410H	Corporate Name Series
008D	Publication Date(008)
008L	Language(008 coded)
008P	Publication Place(008 coded)
0350	System Number for de-duping (035a)
600T	Personal Name Subject: Title <
700X	Other Personal Name: Title <
710X	Other Corporate Name: Title <

Table 8-2.   Valid Left-Anchored Search Codes (Page 5 of 5)

Search Index	Search Name
711X	Other Conference Name: Title <
6900	Local Subject
7402	Uncont. Title AE ($a)<

Running the UB Request Promotions batch job (Circjob 32)

To run the UB Request Promotions circulation batch job operators have three options.

- command line
- WebAdmin
- cron

From the command line, you must use the -p parameter to identify the callslip queue from which items are being promoted. The `XXX` in `promoteXXX.cfg` file is the code for the callslip queue.

The command line to run Circjob 32 is:

`Pcircjob -j32 -ppromoteXXX.cfg`

To run using WebAdmin see the *Voyager Technical User's Guide*.

The job can be set to run as a cron. This cron does take some time, and is resource-intensive, so choose a suitable time to run it (suitable both to you and your fellow UB partners, whose databases you may be searching).

NOTE:
These options assume that the `promoteXXX.cfg` file is in the `/m1/voyager/xxxdb/ini` directory on your server. If it is not, then you must specify the full path to the `promoteXXX.cfg` file.

UB Request Promotion Error Messages

Errors occurring during UB Request promotion are detailed in the `circjob.log` file located in the `/m1/voyager/xxxdb/rpt` directory.

Table 8-3 lists the possible error messages, along with a description of each.

Table 8-3.   UB Request Promotion Error Messages

Error message	Error resolution	See...
No database code was found in the `promoteXXX.cfg` file.	Make sure at least one valid database code is in the `promoteXXX.cfg` file.	[DBCODE] stanza on page 8-8.
The database code XXXX is invalid.	Make sure that the database code in the `promoteXXX.cfg` file is the same as the one in **Database Definitions** (Voyager System Administration) for that database.	[DBCODE] stanza on page 8-8. **NOTE:** These are case sensitive. *Voyager System Administration User's Guide.*
Unable to connect to XXXX.	Check if the database could be (or could have been) down.	
XXXX is not a Universal Borrowing database.	Make sure that the **UB Database** check box is checked for that database in Voyager System Administration.	*Voyager System Administration User's Guide.*
Unable to locate `promoteXXX.cfg`.	Make sure the `promoteXXX.cfg` file is in the `/m1/voyager/xxxdb/ini` directory. If it is not, move it, or specify the entire path in the Circjob 32 command line.	The promoteXXX.cfg file on page 8-7.
The index code XXXX is invalid.	Check index codes in the `promoteXXX.cfg` file.	Index Specification on page 8-10 or Index Specification on page 8-11.
No monograph index code was found in the `promoteXXX.cfg` file.	Enter at least one valid index code specification in the `[MONOGRAPHS]` stanza in the `promoteXXX.cfg` file. This is just a warning if the serial code is present.	[MONOGRAPHS] stanza on page 8-9.

Table 8-3.   UB Request Promotion Error Messages

Error message	Error resolution	See...
No serial index code was found in the `promoteXXX.cfg` file.	Enter at least one valid index code specification in the `[SERIALS]` stanza in the `promoteXXX.cfg` file. This is just a warning if the monograph code is present.	[SERIALS] stanza on page 8-10.
Unable to search for the item in request XXXX using the indexes listed.	Make sure all potential indexes are listed in the `promoteXXX.cfg` file. The value is not found in the source bibliographic record.	[MONOGRAPHS] stanza on page 8-9 or [SERIALS] stanza on page 8-10.
No leader codes have been specified for monograph requests in the `promoteXXX.cfg` file, or they were configured incorrectly.	Enter at least one valid leader code specification in the `[MONOGRAPHS]` stanza in the `promoteXXX.cfg` file.	[MONOGRAPHS] stanza on page 8-9.
No leader codes have been specified for serial requests in the `promoteXXX.cfg` file, or they were configured incorrectly.	Enter at least one valid leader code specification in the `[SERIALS]` stanza in the `promoteXXX.cfg` file.	[SERIALS] stanza on page 8-10.
Unable to promote request XXXX. Leader code not found in the *promoteXXX.cfg* file.	The byte 7 of the leader of the record being promoted does not match either of the leader specifications in the `promoteXXX.cfg` file. Make sure that all possible leader (byte 7) values are listed in the correct stanza (`[MONOGRAPHS]` or `[SERIALS]`).	The promoteXXX.cfg file on page 8-7.
Unable to promote request XXXX because item not found in databases.	None: No match for the record in the specified request could be found in any of the databases searched, using all indexes specified. Circjob 32 will attempt to promote request again next time (unless request archived or past not needed after date).	

Table 8-3. **UB Request Promotion Error Messages**

Error message	Error resolution	See...
Unable to promote request XXXX. Patron is blocked from placing UB Requests.	Patron must resolve issue causing UB block, home or UB aggregate.	
Unable to promote request XXXX. Patron is blocked at the holding library.	Patron must resolve issue causing UB block.	

Displaying Canceled UB Requests WebVoyáge

There are a couple of notes relating to canceling requests, as it pertains to displaying in WebVoyáge:

1. For a pending request, even one that has been promoted to a new library, if you cancel the request from the WebVoyáge Patron Information page, the pending request still appears with the status of canceled until running Circjob 8, removes it.

2. For a processed request, that is, one with a status of Intransit on Hold, the request appears and the status reads In transit to holding library. If you cancel the request from the WebVoyáge Patron Information page it is automatically canceled.

3. For a processed request one that has the status of items available in WebVoyáge if you cancel the request, it is automatically removed.

4.

In each case, if the request cannot be promoted, the circjob attempts to promote the request the next time you run it, unless the request has been archived or is past its not needed after date.

5.

Update Remote Circulation Cluster Cache (Circjob 33)

For sites that participate in Voyager's Universal Borrowing this batch job will contact all remote UB databases and retrieve their Circulation Clusters and patron groups such that they are available for use in the Circulation module or WebVoyáge.

Once contacted the tables in the local database are updated with information from the remote databases. The system then checks that no patron groups mappings are orphaned. That is, if a remote site had deleted a patron group the system updates that information in the local database.

⚠ **IMPORTANT:**
This job should be run after your upgrade to have the Circulation Cluster and Patron Group information available locally.

The job can be run as often as the site wants. Lastly, it should be run any time that a remote database has altered its patron groups if you are aware of this change.

NOTE:
This job can be run using WebAdmin. It can be set up on a cron.

For additional information regarding Circjob 33, Update Remote Circulation Cluster Cache, see the *Voyager Circulation Clusters User's Guide*.

Updating the Remote Cluster Cache manually

The **Refresh Cache** button on the **Remote Cluster Cache** tab for each UB database in **Voyager System Administration>Search> Database Definitions** is used to updates Circulation Cluster and patron information from that database.

NOTE:
Be sure to refresh your remote cluster cache with your remote cluster libraries' schedules (as well as yours) in mind, as refreshing the cache connects to their databases and retrieves the information.

Prepackaged Access Reports

9

Introduction

Prepackaged Access reports provide operational and statistical information to Circulation administrators about Universal Borrowing activity. The reports run as part of the `reports.mdb` collection. They are responsible for gathering information about active and historical UB transactions for both home library patrons (borrowing) and remote patrons (lending). In addition, these reports collect fine and fee information and shipping statistics, and provide in transit information for UB items.

Based on consortia needs, aggregate (warehouse) reports provide tools and support for gathering statistical information from multiple Voyager databases that participate in a Universal Borrowing consortium (see Universal Borrowing Consortium Reports on page 9-23).

For more information about using and setting up Prepackaged Access reports, as well as additional inter-cluster reports, see the *Voyager Reporter User's Guide*.

Universal Borrowing Reports

The Universal Borrowing reports have been divided into current and historical transactions for home patrons, remote patrons, and UB items.

The tables in this chapter provide an overview of each report, the data the report collects, parameters, report queries, notes, and a sample copy of the printed report.

UB Home Patron Reports - Current Transactions

These reports keep track of current UB activities for local (home) patrons.

UB Home Patrons with Active UB Charges

Table 9-1 describes this report and Figure 9-1 shows an example of the report.

Table 9-1.   UB Home Patrons with Active UB Charges

Overview	This report lists current outstanding UB charges for all home patrons by Holding Library.
Report Data	Holding library, patron name and barcode, total charges.
Base Query	Patron name, database name, charges.
Parameters	None.
Notes	None.

UB Home Patrons with Active UB Charges
AimerCat

Lending Library: BlakeCat   Charges

Arms, M. Michele (2675)	3
Cohen, Steve (8686)	2
Dill, Jens M (4428)	9
Lock, Steve W ()	2
Rounds, Laura A ()	1
Venckus, Bradley (EISI2618)	1
Venckus, Christopher A (EISI1234)	23
Wentworth, Phillip (781054)	1
	42

Figure 9-1.   Example UB Home Patrons with Active UB Charges report

UB Home Patrons with Outstanding Requests (x days)

Table 9-2 describes this report and Figure 9-2 shows an example of the report.

Table 9-2.   UB Home Patrons with Outstanding Requests (x days)

Overview	This report lists the total number of current requests for home patrons that have not been filled for any reason.
Report Data	Patron name and barcode, status of request, request date, Holding library.
Base Query	Database ID, database name, request status, status date, status description, patron name.
Parameters	Number of days outstanding; zero days means all requests.
Notes	None.

UB Home Patrons with Outstanding Requests (30 days)

Arms, M. Michele (2675)
In transit
2/9/01	BlakeCat
2/9/01	BlakeCat
2/9/01	BlakeCat
2/12/01	BlakeCat
2/12/01	BlakeCat
2/12/01	BlakeCat
4/10/01	DyerCat

Atkins, Chet ()
In transit
2/21/01	BlakeCat

Brown, Aura ()
In transit
3/5/01	BlakeCat

Figure 9-2.   Example UB Home Patrons with Outstanding Requests (x days) report

UB Home Patrons with UB Fines and Fees

Table 9-3 describes this report and Figure 9-3 shows an example of the report.

Table 9-3. UB Home Patrons with UB Fines and Fees

Overview	This report lists current fine and fee balances at Holding library for home patrons, sorted by patron.
Report Data	Patron name and barcode, Holding library, fine and fee balance for Holding library, fine and fee total balance for patron.
Base Query	Patron name, patron ID, database name, fine/fee total.
Parameters	None.
Notes	None.

Figure 9-3.   Example UB Home Patrons with UB Fines and Fees report

UB Home Patrons with UB Fines and Fees (Grouped by database)

Table 9-4 describes this report and Figure 9-4 shows an example of the report

Table 9-4.   UB Home Patrons with UB Fines and Fees (Grouped by db)

Overview	This report lists current fine and fee balances at Holding library for home patrons, sorted by Holding library.
Report Data	Holding Library, patron name and barcode, fine and fee balance for patron, fine and fee balance total for Holding library.
Base Query	Patron name, patron ID, database name, fine/fee total.
Parameters	None.
Notes	None.

UB Home Patrons with UB Fines and Fees (grouped by db)

BlakeCat

Aimer, Virginia (1135)	$25.00
Arms, M. Michele (2675)	$3.15
BBB, UB Patron (BBB)	$55.00
Dill, Jens M (4428)	$225.00
Rounds, Laura A ()	$50.00
Venckus, Christopher A (EISI1234)	$110.90
	$469.05

DyerCat

Wentworth, Phillip (781054)	$1.50
	$1.50

Figure 9-4.   Example UB Home Patrons with UB Fines and Fees report

UB Home Patron Reports - Historical Transactions

These reports keep track of historical UB transactions for local (home) patrons.

UB Home Patrons - Historical Charges by Holding Library

Table 9-5 describes this report and Figure 9-5 shows an example of the report.

Table 9-5.   UB Home Patrons - Historical Charges by Holding Library

Overview	This report counts total number of historical UB charges to home patrons by Holding library.
Report Data	Holding library, total charges.
Base Query	Database name, charges, start date, end date, database ID.
Parameters	Start date and end date based on the discharge date of the item. The end date parameter is 12:01 on the date indicated. If you want to include historical charges for a particular end date, use an end date that is the day after the "real" end date.
Notes	Historical means the UB item has been charged from the Holding library and discharged from a Visited library (the library to which the item was returned).

UB Home Patrons - Historical Charges by Holding Library
01/01/01 to 05/31/01

Holding Library	Charges
BlakeCat	37
DyerCat	2
Total	*39*

Figure 9-5.   Example UB Home Patrons - Historical Charges by Holding Library report

UB Home Patrons - Historical Charges by Home Patron Groups

Table 9-6 describes this report and Figure 9-6 shows an example of the report.

Table 9-6.   UB Home Patrons - Historical Charges by Home Patron Groups

Overview	This report counts total number of historical UB charges to home patrons by home patron group.
Report Data	Home patron group, total charges.
Base Query	Patron group name, charges, start date, end date.
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical charges for a particular end date, use an end date that is the day after the "real" end date.
Notes	Historical means the UB item has been charged from the Holding library and discharged from a Visited library (the library to which the item was returned).

UB Home Patrons - Historical Charges by Home Patron Group
01/01/01 to 05/31/01

Home Patron Group	Charges
Faculty	38
Staff	1
Test Patron Group	7
Undergraduate Student	10
Total:	*56*

Figure 9-6.   Example UB Home Patrons - Historical Charges by Home Patron Group report

UB Home Patrons - Historical Requests by Holding Library

Table 9-7 describes this report and Figure 9-7 shows an example of the report.

Table 9-7.   UB Home Patrons - Historical Requests by Holding Library

Overview	This report counts the total number of historical UB Requests made by home patrons listed by Holding Library.
Report Data	Holding library, total number of historical UB Requests.
Base Query	Database name, requests, start date, end date, database ID.
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the "real" end date.
Notes	Historical means the UB item has been requested from the Holding library and either processed as not filled, expired, or charged to the patron at the Pickup library.

UB Home Patrons - Historical Requests by Holding Library
01/01/01 to 05/31/01

Holding Library	Requests
BlakeCat	50
Total	**50**

Figure 9-7.   Example UB Home Patrons - Historical Requests by Holding Library report

UB Home Patrons - Historical Requests by Home Patron Group

Table 9-8 describes this report and shows an example of the report.

Table 9-8.   UB Home Patrons - Historical Requests by Home Patron Group

Overview	This report counts the total number of historical UB Requests made by home patrons listed by home patron group.
Report Data	Home patron group, total number of historical UB Requests.
Base Query	Patron group name, requests, start date, end date.
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the "real" end date.
Notes	Historical means the UB item has been requested from the Holding library and either processed as not filled, expired, or charged to the patron at the Pickup library.

UB Home Patrons - Historical Requests by Home Patron Group
01/01/01 to 05/31/01

Home Patron Group	Requests
Faculty	50
Test Patron Group	14
Undergraduate Student	5
Total:	*69*

Figure 9-8.   Example UB Home Patrons - Historical Requests by Home Patron Group report

Remote Patron Reports - Current Transactions

These reports keep track of current UB transactions for remote patrons in the local database.

UB Stub Patrons

Table 9-9 describes this report and Figure 9-9 shows an example of the report.

Table 9-9.   UB Stub Patrons

Overview	This report lists all stub patron records in the local database, sorted by the stub patron's Home library.
Report Data	Home library, patron name and barcode, total number of stub patron records per Home library in the local database, create date of in local database, patron home database patron ID.
Base Query	Patron ID, patron name, ID, database name, patron ID UB, create date.
Parameters	None
Notes	None

UB Stub Patrons

Home Library: BlakeCat	Create Date	Home DB Patron ID
AAA, UB TestPatron (AAA)	10/31/00	217
Arms, Michele (1860)	6/4/01	334
Brown, Aura ()	5/30/01	314
James, Skip ()	7/29/99	26
Korzh, Lev ()	1/25/01	276
Murray, Ted Bert ()	10/25/00	203
Ng, Mei (100081)	11/21/00	138
Palsir, Amy (100084)	1/26/01	141
Taylor, Debra (100115)	1/11/01	172
Venckus, Debra (100123)	9/11/00	180
Wettstein, Eric (100127)	1/2/01	2

11 patrons from BlakeCat

Home Library: CooperCat	Create Date	Home DB Patron ID
Salvator, Bock ()	4/24/01	9763

1 patrons from CooperCat

Home Library: DyerCat	Create Date	Home DB Patron ID
Cupcake, Bill ()	4/25/01	322
Patron, B. ()	5/3/01	285
Patron, C. ()	5/3/01	286

3 patrons from DyerCat

Figure 9-9.   Example UB Stub Patrons report

UB Stub Patrons with Active Charges

Table 9-10 describes this report and Figure 9-10 shows an example of the report.

Table 9-10.   UB Stub Patrons with Active Charges

Overview	This report lists current outstanding charges for stub patron records in the local database.
Report Data	Home library, patron name and barcode, item barcode and title, charge date, due date.
Base Query	Database name, patron name, current due date, charge date, item ID, brief title, item barcode.
Parameters	None.
Notes	None.

UB Stub Patrons with Active Charges

Patron Home Library: BlakeCat

AAA, UB TestPatron (AAA)
39550000349430   Frog and toad together.   Charged: 12/14/00 Due: 1/12/01

Arms, Michele (1860)
39550000395904   Atmospheric processes /   Charged: 6/4/01   Due: 6/11/01

James, Skip ()
39550000083492   Long hot summer /   Charged: 4/13/00 Due: 4/18/00

Korzh, Lev ()
39550000365691   Car thief.   Charged: 1/25/01 Due: 2/24/01

Murray, Ted Bert ()
159   One minute after you die : a preview of your final destination /   Charged: 10/25/00 Due: 11/8/00
1235   Bride of heaven, pride of hell /   Charged: 10/25/00 Due: 11/1/00

Figure 9-10.   Example UB Stub Patrons with Active Charges report

UB Stub Patrons with Fines and Fees

describes this report and shows an example of the report

Table 9-11.   UB Stub Patrons with Fines and Fees

Overview	This report lists all stub patron records in the local database with outstanding fines and fees. Fine details (for example, overdue or lost) are included.
Report Data	Home library, patron name and barcode, circulation location, status date, type of fine/fee, amount of fine/fee and total amount, fine/fee balance and total balance, fine/fee subtotal by circulation location and patron, fine/fee total for Home library, grand total for all Home libraries.
Base Query	Create date, operator ID, fine/fee location, item ID, fine/fee balance, first name, middle name, last name, fine/fee amount, fine/fee description, patron home database.
Parameters	None.
Notes	Sorted and totaled by Home library.

UB Stub Patrons with Fines and Fees

Patron Home Library: BlakeCat   **Amount**   **Balance**
AAA, UB TestPatron

   brown campus
                 11/8/00 Overdue $25.00 $5.00
                 11/16/00 Overdue $7.50 $1.50
                 11/17/00 Overdue $15.00 $3.00
                                                      $47.50   **$9.50**
   Circulation Desk
                 4/3/01 Lost Item Processing $25.00 $5.00
                 4/3/01 Lost Item Replacement $50.00 $10.00
                 4/3/01 Overdue $25.00 $5.00
                                                      $100.00   **$20.00**
                                                      $147.50   **$29.50**

  James, Skip

   Circulation Desk
                 6/8/00 Lost Item Replacement $50.00 $10.00
                 6/8/00 Lost Item Processing $25.00 $5.00
                 6/8/00 Overdue $50.00 $10.00
                                                      $125.00   **$25.00**
                                                      $125.00   **$25.00**

Figure 9-11.   Example UB Stub Patrons with Fines and Fees report

Patron Fines and Fees - UB Stub Patrons Only

Table 9-12 describes this report and Figure 9-12 shows an example of the report.

Table 9-12.   Patron Fines and Fees - UB Stub Patrons Only

Overview	This report lists all stub patron records in the local database with outstanding fines and fees. Fine details (for example, overdue or lost) are included.
Report Data	Patron name, barcode, and Home Library, circulation location, status date, type of fine/fee, amount of fine/fee and total amount, fine/fee balance and total balance, fine/fee grand total for all stub patrons.
Base Query	Create date, operator ID, fine/fee location, item ID, fine/fee balance, first name, middle name, last name, fine/fee amount, fine/fee description, patron home database.
Parameters	None.
Notes	Sorted and totaled by UB stub patrons.

Patron Fines and Fees - UB Stub Patrons Only

		Amount	Balance
AAA, UB TestPatron (AAA) - BlakeCat			
brown campus			
11/8/00	Overdue	$5.00	$5.00
11/16/00	Overdue	$1.50	$1.50
11/17/00	Overdue	$3.00	$3.00
		$9.50	$9.50
Circulation Desk			
4/3/01	Lost Item Processing	$5.00	$5.00
4/3/01	Lost Item Replacement	$10.00	$10.00
4/3/01	Overdue	$5.00	$5.00
		$20.00	$20.00
		$29.50	$29.50
James, Skip () - BlakeCat			
Circulation Desk			
6/8/00	Lost Item Replacement	$10.00	$10.00
6/8/00	Lost Item Processing	$5.00	$5.00
6/8/00	Overdue	$10.00	$10.00
		$25.00	$25.00
		$25.00	$25.00

Figure 9-12.   Example Patron Fines and Fees - UB Stub Patrons Only report

Remote Patron Reports - Historical Transactions

These reports keep track of historical UB transactions for remote patrons in the local database.

UB Historical Charges by Patron Home Database

Table 9-13 describes this report and Figure 9-13 shows an example of the report.

Table 9-13.   UB Historical Charges by Patron Home Database

Overview	This report counts total number of historical charges at the local library by the patron home library.
Report Data	Patron home library, total charges per home library, total charges for all home libraries.
Base Query	Database ID, charges, database name, start date, end date.
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the real end date.
Notes	Historical means the UB item has been charged from the Holding library and discharged from a Visited library (the library to which the item was returned).

UB Historical Charges by Patron Home Database
AimerCat
01/01/01 to 05/31/01

Patron Home Database	Charges
BlakeCat	21
CooperCat	2
Total:	*23*

Figure 9-13.   Example UB Historical Charges by Patron Home Database report

UB Historical Charges by Stub Patron Group

Table 9-14 describes this report and Figure 9-14 shows an example of the report.

Table 9-14.   UB Historical Charges by Stub Patron Group

Overview	This report counts total number of historical charges at the local library by the local patron group to which remote patron groups are mapped.
Report Data	Local patron group, charges for individual local patron groups, total charges for all local patron groups.
Base Query	Patron group name, charges, start date, end date.
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the "real" end date.
Notes	If all remote patron groups are mapped to one local patron group, you will only receive historical charge data for the one patron group. Historical means the UB item has been charged from the Holding library and discharged from a Visited library (the library to which the item was returned). Not a very interesting report if all remote patron groups are mapped to a single local patron group.

UB Historical Charges by Stub Patron Group
AimerCat
01/01/01 to 05/31/01

Local Patron Group	Charges
Faculty	23
Total:	*23*

Figure 9-14.   Example UB Historical Charges by Stub Patron Group report

UB Historical Requests by Patron Home Database

describes this report and shows an example of the report

Table 9-15.   UB Historical Requests by Patron Home Database

Overview	This report counts total number of historical requests at the local library by the patron home library.
Report Data	Patron home library, total requests per home library, total requests for all home libraries.
Base Query	Database name, requests, start date, end date.
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the "real" end date.
Notes	Historical means the UB item has been requested from the Holding library and either processed as not filled, expired, or charged to the patron at the Pickup library.

UB Historical Requests by Patron Home Database
AimerCat
01/01/01 to 05/31/01

Patron Home Database	Requests
BlakeCat	12
CooperCat	2
DyerCat	2
Total:	*16*

Figure 9-15.   Example UB Historical Requests by Patron Home Database report

UB Historical Requests by Stub Patron Group

Table 9-16 describes this report and shows an example of the report

Table 9-16.   UB Historical Requests by Stub Patron Group

Overview	This report counts total number of historical requests at the local library by the stub patron group.
Report Data	Local patron group, requests for individual local patron groups, total requests for all local patron groups.
Base Query	Patron group name, requests, start date, end date.
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the "real" end date.
Notes	Historical means the UB item has been requested from the Holding library and either processed as not filled, expired, or charged to the patron at the Pickup library.

UB Historical Requests by Stub Patron Group
AimerCat
01/01/01 to 05/31/01

Local Patron Group	Requests
Faculty	16
Total:	*16*

Figure 9-16.   Example UB Historical Requests by Stub Patron Group report

UB Item Reports - Current Transactions

These reports keeps track of local (holding) items currently in the shipping process.

UB Holding Library Items in Transit (all)

Table 9-17 describes this report and Figure 9-17 shows an example of the report

Table 9-17.   UB Holding Library Items in Transit (all)

Overview	This report lists all UB items currently with an "In Transit" status.
Report Data	Items shipped from the Holding library and shipped to the Pickup Library, date and time (see Notes), title, author, and item barcode. Items shipped from the Visited library and shipped to the Holding library, date and time (see Notes), title, author, and item barcode.
Base Query	Shipped date, voyager databases from database name and sort key, voyager databases "to" database name and sort key, title, item barcode.
Parameters	None.
Notes	In Transit means the UB item has been either processed in Call Slip as "filled" by the Holding library, or discharged from the Visited library (the library to which the UB item was returned). The date and time information in the report comes from that action.

UB Holding Library Items in Transit (all)

Shipped from: AimerCat

Shipped to: BlakeCat

2/6/01 4:11:46 PM	*Recognizing biography / William H. Epstein.*	39550000185933
2/6/01 5:03:12 PM	*American autobiography : the prophetic mode / G. Thomas Couser.*	39550000102482
2/6/01 5:15:07 PM	*Psychology, religion, and healing.*	39550000256056
3/13/01 3:13:16 PM	*25 sacred songs : for voice and piano / Bach, J.S. ; (Roth).*	39550000224369

Shipped to: CooperCat

2/7/01 9:27:40 AM	*Wisdom of insecurity.*	39550000253491
2/7/01 9:32:30 AM	*Dance band era; the dancing decades from ragtime to swing: 1910-1950 / [by] Albert McCarthy.*	39550000055185
4/24/01 4:09:22 PM	*Piggins / by Jane Yolen ; illustrated by Jane Dyer.*	39550000176221

Shipped from: BlakeCat

Shipped to: AimerCat

3/13/01 11:08:31 PM	*India : a world in transition / Beatrice Pitney Lamb.*	39550000458975

Shipped from: CooperCat

Shipped to: AimerCat

5/21/01 7:52:55 PM	*This is Stevie's story. Introd. by Pearl S. Buck.*	39550000296391

Figure 9-17.   Example UB Holding Library Items in Transit (all) report

UB Holding Library Items in Transit (over x days)

Table 9-18 describes this report and Figure 9-18 shows an example of the report

Table 9-18.   UB Holding Library Items in Transit (over x days)

Overview	This report lists all UB items with an In Transit status for a specific time period to identify missing items.
Report Data	Items shipped from the Holding library and shipped to the Pickup Library, date and time (see Notes), title, author, and item barcode.
	Items shipped from the Visited library and shipped to the Holding library, date and time (see Notes), title, author, and item barcode.
Base Query	Shipped date, voyager databases from database name and sort key, voyager databases "to" database name and sort key, title, item barcode, over x days in transit.
Parameters	Number of days in over which the item has been in transit.
Notes	In Transit means the UB item has been either processed in Call Slip as "filled" by the Holding library, or discharged from the Visited library (the library to which the UB item was returned). The date and time information in the report comes from that action.

UB Holding Library Items in Transit (over 30 days)

Shipped from: AimerCat

Shipped to: BlakeCat

2/6/01 4:11:46 PM	*Recognizing biography / William H. Epstein.*	39550000185933
2/6/01 5:03:12 PM	*American autobiography : the prophetic mode / G. Thomas Couser.*	39550000102482
2/6/01 5:15:07 PM	*Psychology, religion, and healing.*	39550000256056
3/13/01 3:13:16 PM	*25 sacred songs : for voice and piano / Bach, J.S. ; (Roth).*	39550000224369

Shipped to: CooperCat

2/7/01 9:27:40 AM	*Wisdom of insecurity.*	39550000253491
2/7/01 9:32:30 AM	*Dance band era; the dancing decades from ragtime to swing: 1910-1950 / [by] Albert McCarthy.*	39550000055185
4/24/01 4:09:22 PM	*Piggins / by Jane Yolen ; illustrated by Jane Dyer.*	39550000176221

Shipped from: BlakeCat

Shipped to: AimerCat

3/13/01 11:08:31 PM	*India : a world in transition / Beatrice Pitney Lamb.*	39550000458975

Figure 9-18.   Example UB Holding Library Items in Transit (over x days) report

UB Item Reports - Historical Transactions

These reports track local (holding) items which have completed the shipping circuit and how well the delivery system is working.

UB Holding Library Items in Transit (all)

Table 9-19 describes this report and Figure 9-19 shows an example of the report

Table 9-19.   UB Inbound Shipping Statistics

Overview	This report calculates the average and maximum shipping times (in days) between libraries for a specific time period.
Report Data	Local library, shipping library, average number of days in transit, maximum number of days in transit, total average, and total maximum.
Base Query	Database name, average days in transit, maximum days in transit, start date, end date.
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the real end date.
Notes	In this report, you are the local database and the shipping libraries listed are either: Visited libraries shipping your local items back to you as the Holding library, or Holding libraries shipping UB items to you as the Pickup library. See also the UB Average Receiving Time by Day (warehouse)report on 9-25.

UB Inbound Shipping Statistics

AimerCat		From: 1/1/01 to 5/31/01
Shipping Library	*Avg. Days In Transit*	*Max Days In Transit*
BlakeCat	15.98	123.88
DyerCat	0.00	0.00
Average	7.99	61.94
Maximum	15.98	123.88

Figure 9-19.   Example UB Inbound Shipping Statistics report

UB Outbound Shipping Statistics

Table 9-20 describes this report and Figure 9-20 shows an example of the report

Table 9-20.   UB Outbound Shipping Statistics

Overview	This report calculates the average and maximum shipping times (in days) between libraries for a specific time period.
Report Data	Local library, receiving library, average number of days in transit, maximum number of days in transit, total average, and total maximum.
Base Query	Database name, average days in transit, maximum days in transit, start date, end date.
Parameters	None.
Notes	In this report, you are the local database and the receiving libraries listed are either:
	Pickup libraries receiving your local items from you as the Holding library, or
	Holding libraries receiving UB items from you as the Visited library.
	See also the UB Average Receiving Time by Day (warehouse)report on 9-25.

UB Outbound Shipping Statistics

AimerCat		From: 1/1/01 to 5/31/01
Receiving Library	*Avg. Days In Transit*	*Max Days In Transit*
BlakeCat	0.50	5.92
CooperCat	0.00	0.00
DyerCat	0.13	0.13
Average	0.21	2.02
Maximum	0.50	5.92

Figure 9-20.   Example UB Outbound Shipping Statistics report

UB Call Slip Statistics

These reports provide statistics for how well call slip processing is working.

UB Call Slip Processing Statistics by Date Range

Table 9-21 describes this report and Figure 9-21 shows an example of the report.

Table 9-21.   UB Call Slip Processing Statistics by Date Range

Overview	This report counts and averages fill and no-fill times (in hours) for UB Requests at the Holding library.
Report Data	Call Slip group, fill/no-fill reason, requests processed per fill/no-fill reason, average hours per fill/no-fill reason, maximum hours per fill/no-fill reason, total requests processed for all call slip groups, total average hours, total maximum hours.
Base Query	Status type, status description, reason description, start date, end date, group name, average processing hours, maximum processing hours, requests processed.
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the real end date.
Notes	See also the UB Call Slip Processing Statistics by Day (warehouse)report on 9-27.

AimerCat
UB Call Slip Processing Statistics
01/01/01 to 05/31/01

Call Slip Queue: *UB_REQUEST*

Status	*Requests Processed*		*Avg. Hours*	*Max Hours*
Filled	12		0.20	1.55
Not Filled: Lost	1		0.62	0.62
Cancelled	2		431.46	431.48
	15			
		Avg	144.09	144.55
		Max	431.46	431.48
All Call Slip Queues	15			
		Avg	*144.09*	*144.55*
		Max	*431.46*	*431.48*

Figure 9-21.   Example UB Call Slip Processing Statistics by Date Range report

Universal Borrowing Consortium Reports

The Universal Borrowing Consortium Reports (warehouse reports) have been designed to provide a method for gathering UB statistical information from all participating libraries. These statistical reports are compiled from data collected from multiple Voyager databases.

Each local library is required to collect data which is generated by a query built into the standard reports.mdb application. The results exist as an independent Access database. Once the data is collected, you must send the results to the location or person which is responsible for compiling the aggregate reports (the master database). The master database is responsible for importing the individual library results into a master report.

Procedure 9-1. Gathering and Exporting Consortium Statistics

Use the following to gather and export the statistics.

1. Double-click the Access Reports folder in the Voyager directory.

2. Double-click the reports.mdb file in the Access Reports directory.

3. Select **Tables** from the **Objects** toolbar (or select **View**> **Database Objects**> **Tables** from the menu).

4. Double-click the specific table. For example, UB Charges by Day (warehouse).

5. If the table contains any data, delete all rows in the table.

6. Close the table.

7. Double-click the specific query (or select **View**> **Database Objects**> **Queries** from the menu), for example, UB Charges by Day (warehouse) to run the query.

   For the UB Charges by Day (warehouse) query, you will be prompted to enter a start date and an end date. Running this query will populate the now empty UB Charges by Day table in your local reports.mdb file.

8. Select **Tables** from the **Objects** toolbar (or select **View**> **Database Objects**>**Tables** from the menu).

9. Highlight the UB Charges by Day (warehouse).

10. Export (**File**> **Export**) the UB Charges by Day (warehouse) table as a delimited text file.

11. Mail or ftp the exported file to the consortium statistics collector.

    Result: The reports are exported.

Procedure 9-2. Importing Consortium Statistics

Use the following to import the local library files.

1. Double-click the Access Reports folder in the Voyager directory.

2. Double-click the reports.mdb file in the Access Reports directory.

3. Select **Get External Data**> **Import** from the **File** menu.

    Result: The **Import** dialog box displays.

4. Select **Text Files (*.txt)** from the drop-down list in the **Files of Type** box.

5. Click the arrow to the right of the **Look In** box and navigate to the directory where the *.txt files containing the local library's table data resides.

6. Double-click the appropriate *.txt file.

    Result: The **Import Text Wizard** dialog box opens.

7. Follow the directions in the **Import Text Wizard** dialog box.

    a. Choose Delimited for the file format.

    b. Choose Comma as the delimiter symbol.

    c. Choose In an Existing Table as a place to store the data.

8. Select the appropriate UB warehouse report from the drop-down list of existing tables.

9. Click the **Finish** button.

    Result: You will receive an message if the import was successful.

10. Click the **Reports** button from the **Objects** toolbar.

11. Double-click the UB Charges by Day report to produce the report.

   Result: The consortium report is created.

Warehouse Reports

The following section discusses warehouse reports.

UB Average Receiving Time by Day (Warehouse)

Table 9-22 describes this report and Figure 9-22 shows an example of the report.

Table 9-22.   UB Average Receiving Time by Day (warehouse)

Overview	Aggregate report which averages the in transit period between shipping and receiving libraries for all participating libraries.
Report Data	Shipping library, receiving library, receipt date, average shipping time, maximum shipping time, summary for shipping library, summary for all
Base Query	Receiving database name, receiving database key, shipping database name, shipping database key, average shipping days, maximum shipping days, receipt date
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the real end date.
Notes	The report contains the same information as displayed in Figure 9-22 for each participating library plus Average and Maximum totals for all libraries.

UB Average Receiving Time by Day
01/01/01 to 06/29/01

Shipping Library   BlakeCat

Receiving Library	ReceiptDate	Avgerage	Maximum
AimerCat	3/15/01	0.01	0.03
AimerCat	3/15/01	0.01	0.03
AimerCat	3/21/01	1.75	1.75
AimerCat	3/21/01	1.75	1.75
AimerCat	3/23/01	0.01	0.01
AimerCat	3/23/01	0.01	0.01
AimerCat	3/29/01	0.00	0.00
AimerCat	3/29/01	0.00	0.00
AimerCat	4/9/01	0.00	0.00
AimerCat	4/9/01	0.00	0.00
AimerCat	4/23/01	0.00	0.00
AimerCat	4/23/01	0.00	0.00
AimerCat	4/26/01	0.03	0.04
AimerCat	4/26/01	0.04	0.05
AimerCat	5/7/01	0.01	0.01
AimerCat	5/7/01	0.01	0.01
AimerCat	5/10/01	0.00	0.00
AimerCat	5/10/01	0.00	0.00
AimerCat	5/14/01	0.00	0.00
AimerCat	5/14/01	0.00	0.00
AimerCat	5/21/01	0.01	0.01
AimerCat	5/21/01	0.01	0.01
AimerCat	5/24/01	2.12	2.12
AimerCat	5/24/01	2.12	2.12
AimerCat	5/30/01	0.00	0.00
AimerCat	5/30/01	0.00	0.00
AimerCat	6/5/01	121.16	123.88
AimerCat	6/5/01	121.16	123.87

Summary for BlakeCat (28 detail records)

Avg		8.94	9.13
Max		121.16	123.88

Figure 9-22.   Example UB Average Receiving Time by Day (warehouse) report

**UB Call Slip Processing Statistics by Day
(Warehouse)**

Table 9-23 describes this report and Figure 9-23 shows an example of the report.

Table 9-23.   UB Call Slip Processing Statistics by Day (warehouse)

Overview	Aggregate report with counts and averages fill and no-fill times (in hours) for UB Requests for the Holding libraries for all participating libraries.
Report Data	Holding library, status, date, number of requests, average processing hours, maximum processing hours, summary for holding library, summary for all
Base Query	Status type, status description, reason description, average processing hours, maximum processing hours, requests processed, status date, database name, database key
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the real end date.
Notes	The report contains the same information as displayed in Figure 9-23 for each participating library plus Summary, Average, and Maximum totals for all libraries.

UB Call Slip Processing Statistics by Day (warehouse)

01/01/01 to 06/29/01

Holding	AimerCat			
Status	Date	Requests	Avg. Hours	Max Hours
Filled	1/30/01	3	0.02	0.02
Filled	4/24/01	1	0.06	0.06
Filled	4/25/01	1	0.04	0.04
Filled	6/4/01	1	0.08	0.08
Filled	1/26/01	3	0.56	1.55
Filled	2/22/01	1		
Filled	3/13/01	2	0.15	0.21
Filled	1/29/01	1	0.07	0.07
Filled	1/26/01	3	0.55	1.54
Filled	2/22/01	1		
Filled	3/13/01	2	0.14	0.20
Filled	4/24/01	1	0.06	0.06
Filled	4/25/01	1	0.04	0.04
Filled	6/4/01	1	0.07	0.07
Filled	1/29/01	1	0.08	0.08
Filled	1/30/01	3	0.02	0.03
Not Filled: Lost	3/13/01	1	0.62	0.62
Not Filled: Lost	3/13/01	1	0.61	0.61
Cancelled	5/21/01	2	431.46	431.47
Cancelled	5/21/01	2	431.46	431.48
Summary for AimerCat (20 detail records)	Sum	32		
	Avg	2	48.12	48.23
	Max	3	431.46	431.48
Summary for all (20 detail records)	Sum	32		
	Avg	2	48.12	48.23
	Max	3	431.46	431.48

Figure 9-23.   Example UB Call Slip Processing Statistics by Day (warehouse) report

UB Charges by Day (Warehouse)

Table 9-24 describes this report and Figure 9-24 shows an example of the report.

Table 9-24. UB Charges by Day (warehouse)

Overview	Aggregate report which counts UB by day for the Holding library and Home library for all participating libraries
Report Data	Holding library, charge date, patron home library number of charges per charge date, total charges for Holding library, grand total of all charges
Base Query	Holding database, holding database key, patron home database, patron home database key, charge date, charges
Parameters	Start date and end date. The end date parameter is 12:01 on the date indicated. If you want to include historical requests for a particular end date, use an end date that is the day after the real end date.
Notes	The report contains the same information as displayed in Figure 9-24 for each participating library plus a Grand Total for all libraries.

UB Charges by Day
01/01/01 to 06/29/01

Loans from Holding Library   AimerCat

Charge Date	Patron Home Library	Charges
1/25/01	BlakeCat	1
1/25/01	BlakeCat	1
1/26/01	BlakeCat	1
1/26/01	BlakeCat	1
1/30/01	BlakeCat	2
1/30/01	BlakeCat	2
1/31/01	BlakeCat	2
1/31/01	BlakeCat	2
2/7/01	CooperCat	3
2/7/01	CooperCat	3
2/16/01	BlakeCat	1
2/16/01	BlakeCat	1
2/20/01	BlakeCat	1
2/20/01	BlakeCat	1
3/1/01	BlakeCat	1
3/1/01	BlakeCat	1
3/2/01	BlakeCat	1
3/2/01	BlakeCat	1
4/2/01	BlakeCat	9
4/2/01	BlakeCat	9
4/4/01	BlakeCat	5
4/4/01	BlakeCat	5
4/25/01	CooperCat	2
4/25/01	CooperCat	2
5/21/01	DyerCat	1
5/21/01	DyerCat	1

Summary for AimerCat (26 detail records)

60

Grand Total   *60*

Figure 9-24.   Example UB Charges by Day (warehouse) report

UB Questions and Answers

10

UB Questions and Answers

This chapter addresses questions that might arise when using Universal Borrowing.

Question: When a patron clicks the **Databases** button in WebVoyáge in order to search one or more databases, he is presented with one or more drop-down lists from which to choose a database(s) (see Figure 10-1). How are the libraries (databases) placed on this list?
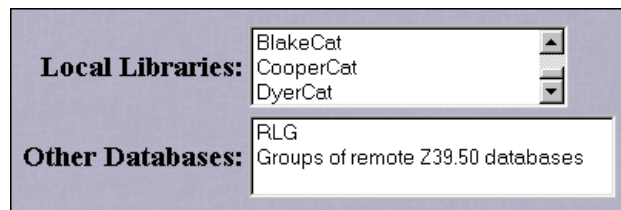
Figure 10-1.   Drop-down lists on Select Database page in WebVoyáge

Answer: In order for libraries (databases) to display in the drop-down list(s) on the **Select Database** page in WebVoyáge, the databases must be defined in System Administration (see Search - Database Definitions work space on page 3-2) and then added to the connect.ini file (see Connect.ini File on page 6-21).

Question: When a patron clicks the **Request** button in WebVoyáge in order to select an OPAC request form, he is presented with the **Patron Logon** page. The **Patron Logon** page (Figure 10-2) includes one drop-down list populated by UB libraries and another list of ID options, for example, barcode, social security number, or institution ID. How do those two lists get populated and can I change the label in front of the library list?

Figure 10-2. Drop-down lists from Patron Logon page in WebVoyáge

Answer: The drop-down list of UB libraries is defined in System Administration (see Search - Database Definitions work space on page 3-2). The drop-down list of ID options is set in the [Login_Types] stanza of the opac.ini file, see the *Voyager WebVoyáge User's Guide*. The label displayed as Home Library in Figure 10-2 can be changed in the [Logon_Page] stanza in the opac.ini file (see [Logon_Page] Stanza on page 6-3).

Question: After the patron logs in, he is presented with a drop-down list of request forms (see Figure 10-3). How does the UB Request get on that list?

Figure 10-3. Drop-down list on Request Select page in WebVoyáge

Answer: When the patron logs in, the system verifies that the Holding cluster has been defined as a UB cluster in the Home cluster's Database Definitions. The system also verifies that the patron has been defined as UB eligible at the Home library. If both are true, then the UB Request form displays in the drop-down list. Also, after John selects UB Request form the drop-down list and clicks **OK**, the

system checks the Patron Group-Item Type combination for all libraries owning the item. Based on these circulation matrices (charge/renew privileges must exist), John may or may not be able to retrieve the UB Request form.

Question: When the UB Request form displays, the **Library** drop-down may include one or more libraries (see Figure 10-4). How is that list populated?

Figure 10-4.   Library and Copy fields on UB Request form in WebVoyáge

Answer: It depends on whether or not you have the lock down option activated in the [UB_Page] stanza of the `opac.ini` file. If you have the lock-down variable set to No, the system randomly selects a library from all the libraries which own a copy of the item. The randomly-selected library displays first on the list followed alphabetically by any other libraries which owns a copy of the item. If the lock-down variable is set to Yes (and the item is not a serial), only one randomly-selected library displays in the **Library** field, see [UB_Page] Stanza on page 6-12 for more information. Once a patron chooses a library, the **Copy** field is automatically populated with all eligible copies of the title.

Question: What makes an item eligible for Universal Borrowing?

Answer: The status of the item must be either Discharged or Not Charged in order to be eligible for Universal Borrowing.

Question: Can any of the labels on the UB Request form (Figure 10-5) be changed?

Figure 10-5.   UB Request form in WebVoyáge

Answer: Most of the labels on the UB Request form can be changed in the `[Request Dialogs]` stanza of the opac.ini file (see [Request Dialogs] Stanza on page 6-10). In Figure 10-5, all of the labels except for Copy and Barcode can be changed in that stanza. You can change the Copy field in the `[UB_Page]` stanza of the `opac.ini` file (see [UB Page] Stanza on page 6-12). The **Barcode** field displays the login type selected by the patron see [Logon Page] Stanza on page 6-3).

Question: How do the **Pick Up Library** and **Pick Up At** fields on the UB Request form get populated (see Figure 10-6)?

Figure 10-6.   Pick Up Library/Pick Up At fields of the UB Request form in WebVoyáge

Answer: The **Pick Up Library** drop-down is populated with all UB defined (in System Administration) libraries (see Search - Database Definitions work space on page 3-2) and defaults to the Home cluster. Once the patron chooses a Pick Up Library, the **Pick Up At** drop-down is populated with all pickup locations for that cluster. See the Circulation Policy Groups section of the *Voyager System Administration User's Guide.*

Question: Can the number of days that displays in the **Not Needed After** field be changed (see Figure 10-7)?
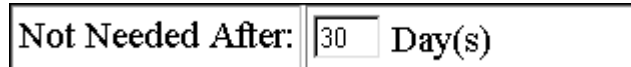
Figure 10-7. Not Needed After field on UB Request form in WebVoyáge

Answer: Yes, in the [Request Dialogs] stanza of the opac.ini file. The NotNeededAfterDays variable defaults to 30 but can be changed (see [Request Dialogs] Stanza on page 6-10). Also, patrons can enter their own Not Needed After - Day(s) on the WebVoyáge request form.

Question: How does the system know whether to block a patron from placing a UB Request?

Answer: The system attempts to verify the UB patron at several different points in the UB process: when the patron first logs in, when the patron clicks the **Submit** button on the UB Request form, and when the item is charged to the patron. Patron blocks can come from the circulation policies of the Holding cluster. See Circulation Policy Definitions and Circulation Matrix Settings on page 4-4, Patron Group Mapping on page 4-5, and Universal Borrowing Policy Definitions on page 4-24.

Question: Where can the patron see all of his regular and UB charges, fines and fees, and requests?

Answer: The only place to view all patron charges, fines and fees, and requests, is on the **Patron Information** page in WebVoyáge.

Question: How does a staff person at the pickup library discharge the UB item?

Figure 10-8. Library drop-down/item barcode fields in Discharge work space

Answer: In the **Discharge** work space of the Voyager Circulation module, the staff person would select the Holding cluster from the **Library** drop-down list then scan or type in the item's barcode in the **Item Barcode** field (see Figure 10-8).

Question: How do I charge a UB item to a remote patron?

**Figure 10-9.   Charge work space of the Voyager Circulation module for UB
libraries**

Answer: In the **Charge** work space of the Voyager Circulation module (Figure 10-
9), you would select the patron's Home cluster from the **Library** drop-down list in
the Patron block then scan or type the patron's barcode in the **Barcode** field. If
the patron is not blocked, you would then select the Holding cluster from **Library**
drop-down list in the Item block then scan or type the item's barcode in the **Item
Barcode** field. Again, if the patron is not blocked, the charge would be successful.

Question: What happens to the stub patron record? Are they in the database
forever?

Answer: You can purge empty stub patron records from your database with
Circulation batch job 29, Purge Universal Borrowing (UB) Patron Stub Records
(see Purge Universal Borrowing (UB) Patron Stub Records (Circjob 29) on
page 8-4).

Question: What happens if I forget to choose the remote patron's home library in
the drop-down list on the **Charge** work space?

Answer: The **Library** drop-down list in the Patron block of the **Charge** work
space defaults to the local database. If you scan the remote patron's barcode into
the **Barcode** field without first selecting the patron's home library, the system tries
to find that barcode in the local database. If that particular patron had an active
stub patron record in the local database then the record displays. The stub patron
record is linked internally to the Home cluster patron record. If the system does
not find the patron in your local database, you see the message shown in
Figure 10-10.
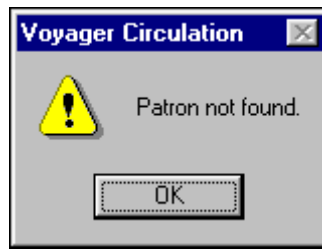
Figure 10-10. Patron not Found message

Question: When I perform a patron search, either from the **Charge** work space or the patron **Search** dialog box in Circulation, do all patrons from the remote library display on the results list?

Answer: No. When you perform a patron search, only those patrons who belong to UB defined patron groups (see UB Patron Groups and Circulation Policy Groups on page 4-4) display in the results list. All patrons at remote libraries that do not have UB borrowing privileges are invisible to any search done from a local library.

Question: If a remote patron comes to my circulation desk and wants to check out one of my items, is that a UB Charge?

Answer: Yes. In this instance, you are the Holding, Visited, and Pickup cluster. If you have the **Allow UB Pick-up from Holding Library** check box selected in the **Circulation - Miscellaneous** work space (see Circulation - Miscellaneous Work Space on page 4-32), then the patron could place the UB Request in WebVoyáge and charge the item at your Circulation desk. If you do not have the check box selected, you can still charge the item to the patron if he brings the item to the desk. However, the patron must belong to a UB eligible patron group in order to charge the item.

Question: If a remote patron returns an UB item to my circulation desk, can I print a discharge receipt for the patron?

Answer: Yes. If you have the **Print Discharge Slips** check box selected for circulation **Preferences**. You can select the check box just before printing the receipt or at the beginning of the circulation session.

You can also select the **Discharge Receipt Print** check box for the Circulation happening location's **Location Settings** dialog box, see the *Voyager System Administration User's Guide*.

Question: When an UB item is returned to and discharged from its Holding cluster, what happens to that item information on the **Patron Information** page?

Answer: Once the item is discharged at the Holding cluster, the information is removed from the **Charged Items** section of the **Patron Information** page.

Question: I noticed the **Proxy Patron** button does not display whenever I enter a remote patron barcode in the **Charge** work space. Can Proxy Patrons, for example, a graduate assistant working for a professor, pickup a UB item for the professor at a remote library?

Answer: No. The only time a Proxy Patron can pickup a UB item for their sponsor is when the Home cluster is also the Pickup cluster. For example, a professor at Aimer University searches WebVoyáge for an item and finds that Blake owns the item. He places a UB Request for the item and selects Aimer as the pickup library. When the professor receives the Item Available notice, he sends his graduate assistant to pickup the book. The circulation operator would scan in the graduate assistant's barcode in the **Charge** work space. The **Proxy Patron** button displays so the operator can click the button and charge the item to the professor.

Question: If a patron brings back a UB item for renewal but the renewal is blocked, can I override the block and renew the item any way?

Answer: Yes, if your local Circulation security settings allow you to override the block. See the *Voyager System Administration User's Guide* for more information.

Question: What happens if a remote item is returned to my library, I discharge the item and send it to the Holding cluster, but then it ends up at the wrong library?

Answer: When the item is discharged the first time from your library, the item status changes from Charged to In Transit Discharged. If a library other than the Holding cluster discharges the item a second time, the FYI column of the **Discharge** work space displays the message `Browse. Route to Aimer University......` The item status remains In Transit Discharged until the item is discharged at the Holding cluster. The Browse transaction at the wrong library is logged in the UB Archive table of the Holding cluster, so if the item remains lost, you can track down the location of the last transaction.

Question: When I display a remote patron record, in either the **Charge** or **Patron** work space, can I click on the buttons and see the patron's charges, fines and fees, and request information?

Answer: You can only see charges, fines and fees, and request information that are related to items in your local cluster. If you are the Pickup cluster (that is, charging a remote item to a remote patron), when you charge the item you see the charge in the lower portion of the **Charge** work space and the charge counter beneath the **Charged Items** button increments by one. However, if you close the

Charge work space and re-display the same patron, the **Charged Items** button only counts the number of *local* items charged to the patron. The only library that is able to see the information related to that charge is the Holding cluster.

Question: Can a patron cancel a UB Request in WebVoyáge?

Answer: Yes. They must click the **Cancel** check box in front of the item they want to cancel then click the **Cancel Requests** button.

Question: What happens if I print a UB Request and then don't find the item? I want to look for the item again the next day rather than process the item as un-filled. Is the request still be listed in Call Slip?

Answer: Yes, the UB Request is still listed on the **Pending** tab in Call Slip. The UB Request remains on the **Pending** tab until it is processed as filled or un-filled or expired. You can print the request many times. If you have your Preferences set to print automatically, it prints when the request is submitted. The word Printed in parenthesis displays after the title afterwards. You can print a request a second time by highlighting the item then selecting **Print**> **Selected** from the **File** menu or right-click and select **Print**> **Selected** from the sub-menu.

Question: If I do not have the **Count Closed Days/Hours/Minutes For Loan** check box selected on the **Policies** tab in Circulation Policy Definitions (that is, due dates for loaned items do not fall on a closed day), does the system take that into consideration when calculating days for the Expire period?

Answer: No, the system does not ignore closed days when calculating the Expire date. The Expire date is calculated from the date on which the UB Request was submitted and the date on which a notices circjob is run. So, if you don't run a notices circjob on the days the library is closed, then the request does not expire. For example, if the Expire date is set to 10 days, day 10 after a UB Request is submitted falls on a Sunday, the library is closed on Sunday, a notices circjob is run on Saturday and then again on Monday, then the request expires at the time the notices circjob on Monday is run. You might want to take this into consideration when determining the Expire date.

Question: What happens if the Not Needed After date passes while the item is in transit to the Pickup cluster?

Answer: When the Pickup cluster discharges the item, staff sees a message to route the item pack to the Holding cluster.

Question: If one of my patrons is unable to successfully submit a UB Request, what does he see in WebVoyáge?

Answer: The error message, `Patron initiated UB Request has failed` (`ubnoitems.htm`). You can configure the message to say anything you want.

Question: What would cause the request to fail?

Answer: Assuming Universal Borrowing has been completely configured for all libraries involved, the major reason the request might fail is patron blocks. The patron should check his patron information in WebVoyáge for overdues, fines, or maximum UB Requests. You might want to configure the error message to suggest the patron check his patron information and possibly, check with his Home cluster.

Question: I already have databases defined in Database Definitions and the connect.ini file for simultaneous searching. What else do I have to do to make these database ready for UB?

Answer: In **System Administration**> **Search**> **Database Definitions**:

1. Highlight an existing database

2. Click the **Edit** button

3. On the **Database** tab, click the **UB** check box. See Configuring the Database Tab on page 3-4.

4. On the **Definitions** tab, add the IP address and port information for Circulation, System Administration, and Call Slip. See Configuring the Definitions tab on page 3-10.

   See also Assigning Access Control Groups on page 3-14.

Question: What happens if a patron performs a simultaneous search among multiple databases and the only database to own the item is one that is not UB defined?

Answer: The patron is able to search the database but he cannot place a UB Request for the item. The **UB** check box must be selected on the **Database** tab of Database Definitions in the local library's System Administration (see Database Tab on page 3-4).

Question: What happens if one of my local patrons charges a UB Requested item before we can pull it and process it in the Call Slip module?

Answer: In that case, you would process the item in the Call Slip module as "not filled". You can create your own "no-fill reasons" (see No-Fill Reasons on page 7-13). You might want to create a no-fill reason like "Charged to Another Patron". The no-fill reason displays on the Patron Information page in WebVoyáge (Figure 10-11) until the Archive Period is past and Circjob 8 is run (see Call Slip Queues on page 7-3).

Figure 10-11.   No-fill reason display in WebVoyáge

Question: Can holds, recalls, or renewals be applied to a UB item?

Answer: Renewals are available if they have been allowed in the Circulation matrix for the Holding cluster's patron group to which the remote patron is mapped (see Circulation - Patron Group Mapping Work Space on page 4-7). Holds and recalls are not allowed for items that belong in clusters other than the patron's home cluster.

Question: We would like to use both regular call slips and UB Requests. Can I set up my call slip rules so that both types of requests are printed from the same PC, at the same location? Also, in the Call Slip module, how can I tell the difference between the two types of requests?

Answer: Yes, you can print both regular call slip requests and UB Requests from the same PC. You have two options:

- If both types of requests are going to use the In Transit for Hold processing code (see Call Slip Print Groups on page 7-3), you can create a default call slip print group that can be used for both request types.

- If you want to use In Transit for Hold for UB Requests, and either Autocharge to Requesting Patron or Place on Hold Shelf for call slip requests, you should create two separate call slip print groups. This will send the requests to two different queues.

NOTE:
If you choose the second option, you will have to switch from one call slip print group to another in order to process requests from the correct call slip queue. See the *Voyager Call Slip Dæmon User's Guide* for more information about changing print groups.

A Call Slip request and a UB Request look the same when you are viewing the requests in the Call Slip module. However, when you process a UB Request as Filled, you see a pop-up note indicating the pickup library to which the item is to be sent. Also, you can configure the UB routing slip with different information than a call slip (see The Callslip.ini File on page 7-19).

Question: If a patron is blocked at their home library, is he still be able to borrow items from the other libraries in the group?

Answer: No, patrons in poor standing at their home library are blocked from Universal Borrowing.

Question: How does the Archive Period and the Expire Period set in **Call Slip - Queues** work space work together?

Answer: The Archive Period determines how long UB Request information displays on the **Patron Information** page in WebVoyáge. The Expire Period determines the length of time that must pass before a UB Request that is not processed or marked with a no-fill reason is assigned a status of Expired by the circulation batch job 8.

Assume the following: the Expire Period is set to three days, the Archive Period is set to five days, and circjob 8 is run everyday. John Q. Student places a UB Request for an item which cannot be found so the UB Request is marked with a no-fill reason. When circjob 8 is run on the third day after the request was made, the request is expired. The request displays in WebVoyáge with a status of expired until five days after the request was *expired*. When circjob 8 is run after the five days have elapsed, the request is removed from the patron information page in WebVoyáge.

Question: If I created special patron groups for remote borrowers, and those patron groups display in UB Policy Definitions, should I make those groups UB eligible?

Answer: No, you should only define your local patron groups as UB eligible. Any special patron groups that you created for remote borrowers are used for Patron Group Mapping.

Question: Can a patron request more than one item, for example, a 2 volume set, using just one UB Request form?

Answer: The patron must request each item separately, placing two UB Requests.

Question: I don't want my video collection to be available for Universal Borrowing. How do I set that up?

Answer: First, create one or more UB patron groups (to be used for mapping remote patron groups). Then you can create a separate Circulation matrix in which the UB patron group/video item type can be defined as non-circulating. See the *Voyager System Administration User's Guide* for more information on the circulation matrix.

Question: Why do the numbers on my historical charges reports differ from the numbers on my historical requests reports?

Answer: Two reasons:

- Requests can be placed but not charged (that is, processed as not filled or expired)
- walk-in remote patrons produce UB Charges but not UB Requests.

Question: If my library is the Pickup cluster, what do I see in Circulation when I discharge the item when it arrives, then charge the item to the requesting patron?

Answer: When the item arrives at your library, you must first discharge the item in Circulation. Choose the appropriate cluster from the **Library** drop-down list then scan or type the item's barcode in the **Barcode** field. First, you see the dialog box in Figure 10-12.
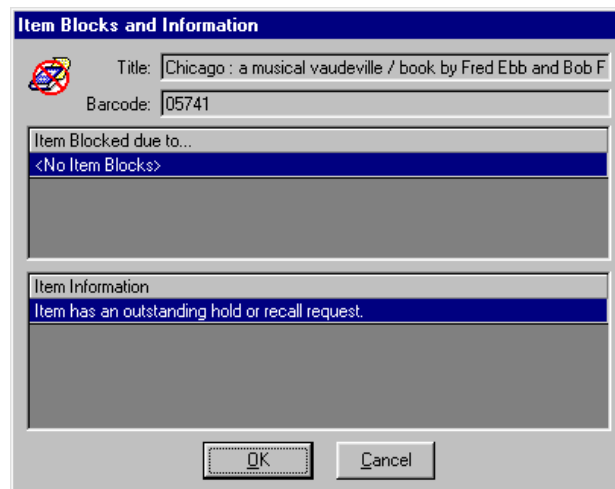
Figure 10-12.   Item Blocks and Information dialog box

The message alerts your staff to the outstanding hold. Click the **OK** button and the item displays in the lower portion of the **Discharge** work space (see Figure 10-13).
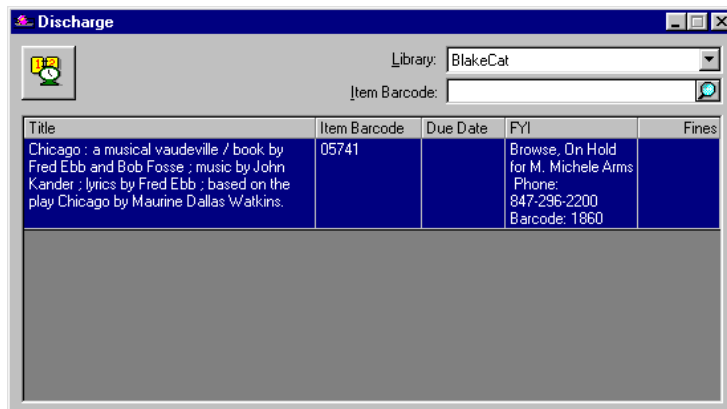
Figure 10-13.   Discharge work space after discharging a UB item at Pickup library

Note the FYI column of the display includes the patron's name, telephone number, and barcode. If you have Print Hold Slips selected in **Options**> **Session Preferences** for the Circulation module, an Item On Hold slip automatically prints with the hold information.

When the patron arrives to pickup the item, you select the patron's Home cluster from the **Library** drop-down list in the patron block of the **Charge** work space then scan or type the patron's barcode in the **Barcode** field.

If there are no blocks on the patron, the system displays the patron information. The usual patron information buttons display any charges, fines/fees, or requests the patron has at your library.

Next, select the Holding cluster from the **Library** drop-down list in the Item block of the **Charge** work space then scan or type the item's barcode in the **Barcode** field. At this point, the **Charge** work space displays (see Figure 10-14).

Figure 10-14.   Charge work space before charging a UB item at Pickup library

When you enter the item's barcode and press Enter, the charge information displays in the lower portion of the **Charge** work space and the counter beneath the **Charged Items** button increments by one. However, if you close the **Charge** work space re-display the patron, only local items will display if you click the **Charged Items** button.

UB Process: What Happens When, Where, Why, and by Whom?

Table 10-1 through Table 10-6 track the actions and changes that take place throughout one UB transaction. They use the same scenario as the Universal Borrowing Process described at the beginning of this document. In this example the Home cluster is Aimer, the Holding cluster is Blake, and the Pickup cluster is Cooper.

Table 10-1.   Action: Patron successfully submits a UB Request using WebVoyáge

Database	Process
Aimer (Home)	• In the patron record on the **Counters** tab, the UB Requests counter increments by 1. • On the **Patron Information** page in WebVoyáge, item title including the library from which the item was requested, accepted (printed), and date/time stamp displays under **Requests Pending** section. • Regular circulation policies and matrices and UB circulation policies are checked for blocks.
Blake (Holding)	• In the item record, the item status before submission is either Not Charged or Discharged. • The item status after submission of UB Request is Call Slip Request. • A stub patron record is created. The status of the request is Accepted. • Circjob 8 examines the Expire Period from Call Slip Print Group Definitions. • The item is still located at Blake. • Local circulation policies and matrices to which remote patron group is mapped checked for blocks.
Cooper (Pickup)	
Dyer (Visited)	• The patron performs a simultaneous search in WebVoyáge, finds items, and places a UB Request.

Figure 10-15 shows the **Request Information** section of the **Patron Information** page in WebVoyáge.

Requests Pending

Cancel?	Item	Status
☐	Canyons and mesas, by Jerome Doolittle and the editors of Time-Life Books. With photos. by Wolf von dem Bussche. **Requested from Blake Cat**	Accepted - 07-18-01 09:23

Cancel Requests   Reset
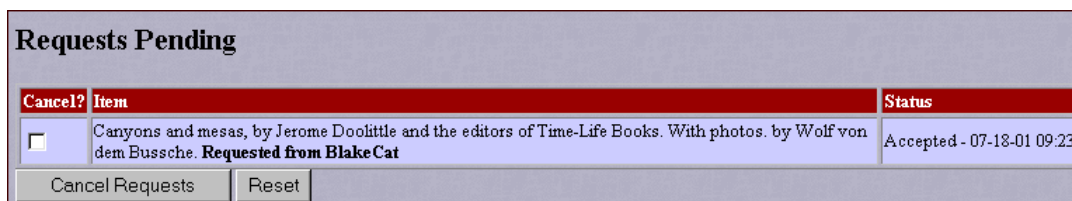
Figure 10-15.   Requests pending in WebVoyáge

Table 10-2.   Action: UB Request processed as "Filled"

Database	Process
Aimer (Home)	• No counters increment/decrement. • On the **Patron Information** page in WebVoyáge, item title and status displays under **Requests Pending** section. • If item is not processed as filled, Circjob 8 examines the Not Needed After Days interval from the UB Request form.
Blake (Holding)	• In Call Slip module, request is processed as Filled. • In the item record, item status is In Transit on Hold; request status is Active in Request Maintenance. • In the stub patron record, **Patron Request Information> Call Slip** tab, the request displays as Filled; **Patron Request Information> Hold/Recall** tab, the item displays under the Requests Pending section. • If item is not processed as filled, Circjob 8 examines the Expire Period from **Call Slip Queue> Values** tab. • Item in transit from Blake to Cooper.
Cooper (Pickup)	• Stub patron record created. • A hold is created for the pickup stub patron record. • System checks the routing entry from Blake.
Dyer (Visited)	• Nothing.

Figure 10-16 shows the **Request Information** section of the **Patron Information** page in WebVoyáge.

Figure 10-16.   Requests pending in WebVoyáge

Table 10-3.   Action: Item arrives at Cooper

Database	process
Aimer (Home)	• No counters increment/decrement. • On the **Patron Information** page in WebVoyáge, item title, expiration date, and pickup location display under **Items Available** section.
Blake (Holding)	• In the item record, item status is On Hold; request status is Pending in Request Maintenance.
Cooper (Pickup)	• Item arrives at Cooper. • Staff discharges item in Circulation module. • The Hold Shelf Life is checked in the Circulation policy for the Circulation happening location. • In the stub patron record, **Patron Request Information> Hold/Recall** tab, the item displays under the **Items Available** section. • Circjob 5 generates Item Available notice for patron.
Dyer (Visited)	• Nothing

Figure 10-17 shows the **Items Available** section of **Patron Information** page in WebVoyáge.
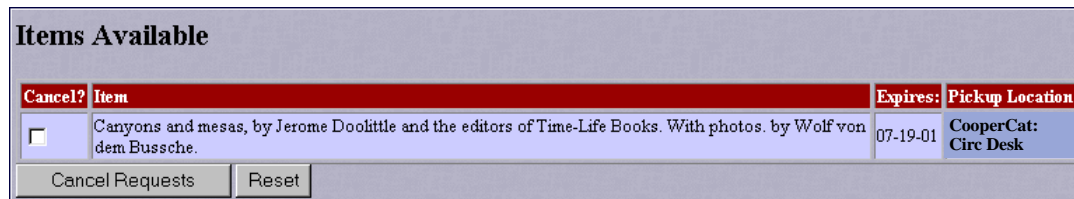
Figure 10-17.   Items Available section of WebVoyáge

Table 10-4.   Action: Item charged to patron

Database	process
Aimer (Home)	• In the patron record on the **Counters** tab, the UB Requests counter decrements by 1; the UB Historical Request counter increments by 1; the UB Charges counter increments by 1. • On the **Patron Information** page in WebVoyáge, item title, status, and due date display under **Charged Items** section.
Blake (Hold-ing)	• In the item record, item status is Charged. • In the stub patron record, the item displays in the Charged Items Index.
Cooper (Pickup)	• Staff charges the item to the patron in the Circulation module. • Loan period is applied based on Circulation matrix for the patron group/item type at Blake. • Patron has the item.
Dyer (Vis-ited)	• Nothing

Figure 10-18 shows the **Charged Items** section of the **Patron Information** page in WebVoyáge.
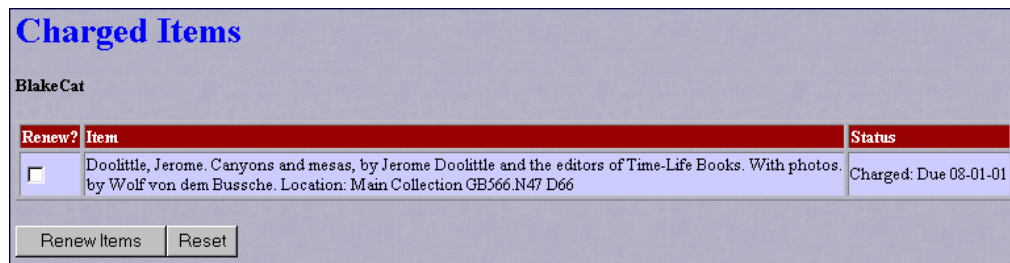
Figure 10-18.   Charged Items section in WebVoyáge

Table 10-5. Action: Patron returns item to Dyer

Database	process
Aimer (Home)	- In the patron record on the **Counters** tab, the UB Charges counter decrements by 1; the UB Historical Charges counter increments by 1. - On the **Patron Information** page in WebVoyáge, the item information is removed from the **Charged Items** section; if fines/fees have accrued, they display in the **Fines/Fees** section.
Blake (Holding)	- In item record, item status is In Transit Discharged. - In the stub patron record, the item is removed from the Charged Items Index; if fines/fees have accrued, they display in the **Fines/Fees** section. - Item in transit from Dyer to Blake.
Cooper (Pickup)	Nothing.
Dyer (Visited)	- Patron returns item. - Staff discharges item in Circulation module; sends item back to Blake.
No display change on **Patron Information** page in WebVoyáge unless fines/fees accrued.	

Table 10-6. Action: Item arrives at Blake

Database	Process
Aimer (Home)	- No counters increment/decrement. - Nothing displays on the **Patron Information** page in WebVoyáge unless fines/fees have accrued.
Blake (Holding)	- Staff discharges item in Circulation module. - In item record, item status is Discharged until Shelving Interval passes; then item status is Not Charged. - In the stub patron record, nothing displays unless fines/fees have accrued. - Circjob 29 deletes the stub patron record if no fines/fees have accrued.
Cooper (Pickup)	Circjob 29 deletes the stub patron record.

Table 10-6.   Action: Item arrives at Blake

Database	Process
Dyer (Visited)	• Nothing
No display change on **Patron Information** page in WebVoyáge unless fines/fees accrued.	

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