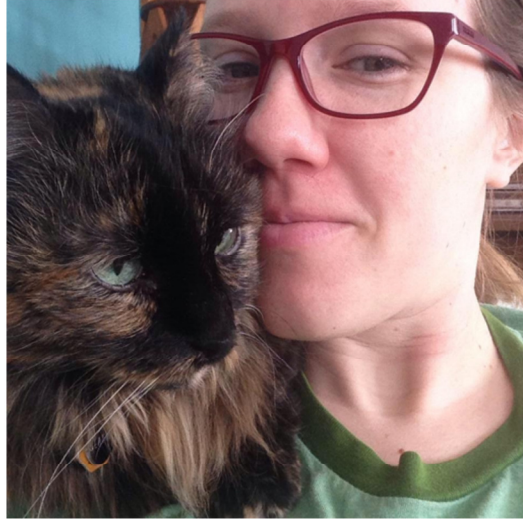


## Your Host

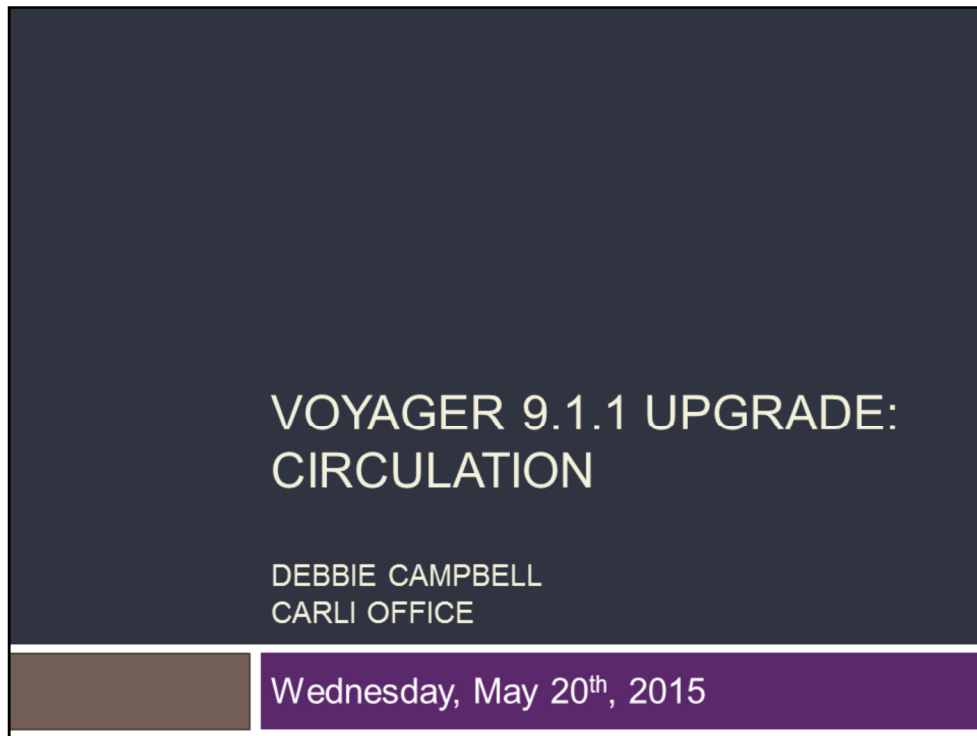


CARLI Consortium of Academic and Research Libraries in Illinois

Hello and welcome to the CARLI Voyager Circulation: What's New in 9.1.1 Webinar.

My name is Debbie Campbell; I'm a Library Services Coordinator here at the CARLI Office. I'm joined by my colleagues Lorna Engels and Jen Masciadrelli who will be helping to monitor questions. I have a few housekeeping tips to get us started, then I will begin the recording.

If you have any questions about the Voyager upgrade following this webinar, please send them in an email to CARLI support. The email address is included on the last slide in this presentation.



During the weekend of June 13<sup>th</sup> through Monday June 15<sup>th</sup>, CARLI has planned a Voyager upgrade from our current version of 7.2.5 to the most recent version released by our vendor, Ex Libris, version 9.1.1.

As a result of this upgrade, the CARLI I-Share Libraries will gain all of the enhancements and bug fixes from Voyager versions 8.0, through the most recently released version, 9.1.1.

This webinar is specifically focused on modifications to the Voyager Circulation Client functionality, and I'm excited to say that there is some great functionality coming!

## Voyager Upgrade Webinar Series

Date	Time	Topic
Tuesday, May 12	2:00 - 3:00	Upgrade Basics & General Voyager 9.1.1 Features
Wednesday, May 13	2:00- 3:00	Voyager Cataloging: What's new in 9.1.1
Monday, May 18	2:00 - 3:00	Voyager Acquisitions: What's new in 9.1.1
<b>Wednesday, May 20</b>	<b>10:00 - 11:00</b>	<b>Voyager Circulation: What's new in 9.1.1</b>
Thursday, May 21	2:00 - 3:00	Voyager Pick & Scan: Changes in 9.1.1
Thursday, May 28	10:00 - 11:00	Voyager System Administration: What's new in 9.1.1
Tuesday, June 2	10:00 - 11:00	Voyager Access Reports: Changes in 9.1.1



CARLI is conducting and recording additional webinars for the topics of Upgrade Basics, Voyager Cataloging, Voyager Acquisitions, Voyager Pick and Scan, Voyager System Administration, and Voyager Access Reporting.

Information about these webinars is listed on CARLI's Voyager Upgrade website; a link to the Upgrade website is included on the last slide in this presentation.

## Webinar Overview

1. Login Security Settings
2. Overall Settings
3. Item Records
4. Patron Records
5. Basic Circulation Functions
  - Charging
  - Discharging
6. Fines and Fees
7. Holds and Recalls
8. Pick and Scan
9. Voyager Reporter
10. Voyager Media Scheduling Client and Short Loan Functionality
  - Questions?



For the purpose of this webinar, I've divided the upgrade changes for Voyager Circulation functionality into 10 broad categories.

Some of these categories have more enhancements than others, also, the information for some of these categories will be discussed in more depth through another webinar, or through upgrade documentation.

Let's begin!

# 1: Login Security Settings

- Displaying Login Information
- Changing Passwords in the Voyager Clients
- New Password Options
  - Configurable Password Requirements
  - Password Expiration
  - Password Expiration: Customizable Alert
  - Invalid Login Attempts: Lockout Feature
  - Invalid Login Attempts: Log



This slide shows a list of the Login Security Setting changes coming with Voyager 9.1.1, we'll discuss these specific changes on the following slides including some specific implications for the Voyager Circulation Client.

## Login Security Settings Displaying Login Information

- When an operator is logged in to any client, view server and database login specifics

Login Information	
Operator Name:	CARLI, Debbie
Operator ID:	debbiei
Location:	DP CIRCULATION
Encryption:	Disabled
Server:	voyager.carli.illinois.edu
Database:	Dakton Comm C
Cluster:	Dakton Community College

OK

CARLI Consortium of Academic and Research Libraries in Illinois

Our current version of Voyager, 7.2.5, already has the option to go to the File Menu and choose the Login Information option to view the logged-in Operator's Name, Username, Circ Happening Location, and Encryption Status.

Since different circulation operators (and happening locations) have different privileges, this can be good information to check if it seems a library staff member may have too many privileges while logged in, or not enough.

Voyager 9.1.1 includes the additional display of Server and Database Login specifics.

>>>CLICK<<<

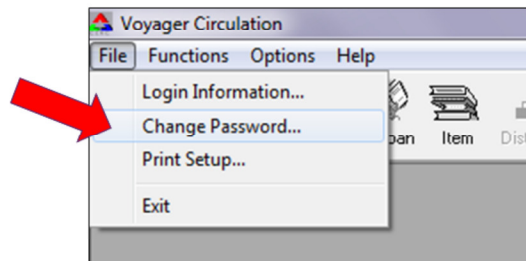
The Server data is pulled from the server line in the voyager.ini. With this information, you can see quickly if you are on the production server (voyager.carli.illinois.edu) or the training/test server (voyager-test.carli.illinois.edu).

The Database line will display your institution's database definition name.

The Circulation Login Information will also include the cluster name that's associated with the circ happening location you chose when you logged in.

## Login Security Settings Changing Passwords in the Client

- Operators can now change passwords from the File menu of each client



Library staff members can now change passwords from the file menu of each client, which in my opinion, is both good and bad.

This option does not allow staff members who have forgotten their password to reset it; rather, it allows a staff member who is unsatisfied with their known password, or whose password is set to expire to change it before it does expire.

Most libraries have a balance of generic and user-specific usernames and passwords.

With the upgrade, Voyager does not discriminate between which usernames can have the passwords changed in the client.

It would be possible for a single library staff member to change the password for one of the generic accounts- like for example, "circstudent".

Should this happen, a Voyager System Administrator retains the ability to update the password from within the SysAdmin client.

New password requirements are available, and I'll discuss those briefly on the next slide; they are applied to any CHANGED password or NEW Password.

When a user attempts to change a password they will be warned of the requirements for their new password.

This warning can be configured in SysAdmin as we will see shortly.



## Login Security Settings New Password Options

- System Administrator is now able to configure password options, for example:
  - Passwords can be set to expire.
  - Password minimum and maximum length
  - What combination of alphanumeric characters are required
- A password expiration alert can be displayed in the client.
- Accounts can be locked after X number of invalid login attempts



All of these password settings are set in Voyager System Administration.

You may or may not be the person who takes care of System Administration updates at your institution.

CARLI's Voyager 9.1.1 SysAdmin updates webinar is scheduled for Thursday, May 28<sup>th</sup> and the specifics of making these, and other changes, will be covered then.

A few examples of the new options are: passwords can be set to expire (or never expire), to have min/max length, and to have specified alphanumeric content.

Accounts can also be locked after a certain number of failed attempts, and log files of failed attempts are available.

All of these options are the same sort of rules we've all been used to with online banking, shopping, etc.

# Login Security Settings

## New Password Options

Security - Security Options

Password Options

Password Requirements Password Requirements 2 Invalid Login Attempts

New password cannot be same as previous 3 passwords

Minimum password age: 1 Days

Maximum password age (expiration): 50 days

Alert user 5 days before password will expire

Password Length

Minimum - at least: 8 Maximum - at most: 15

Password may contain:

User's Id  User's name

Password must contain:

All of the selected requirements  At least 1 of the requirements selected below

At least 5 alphabetic character(s)

At least 1 uppercase character(s)

At least 1 lowercase character(s)

At least 1 number character(s)

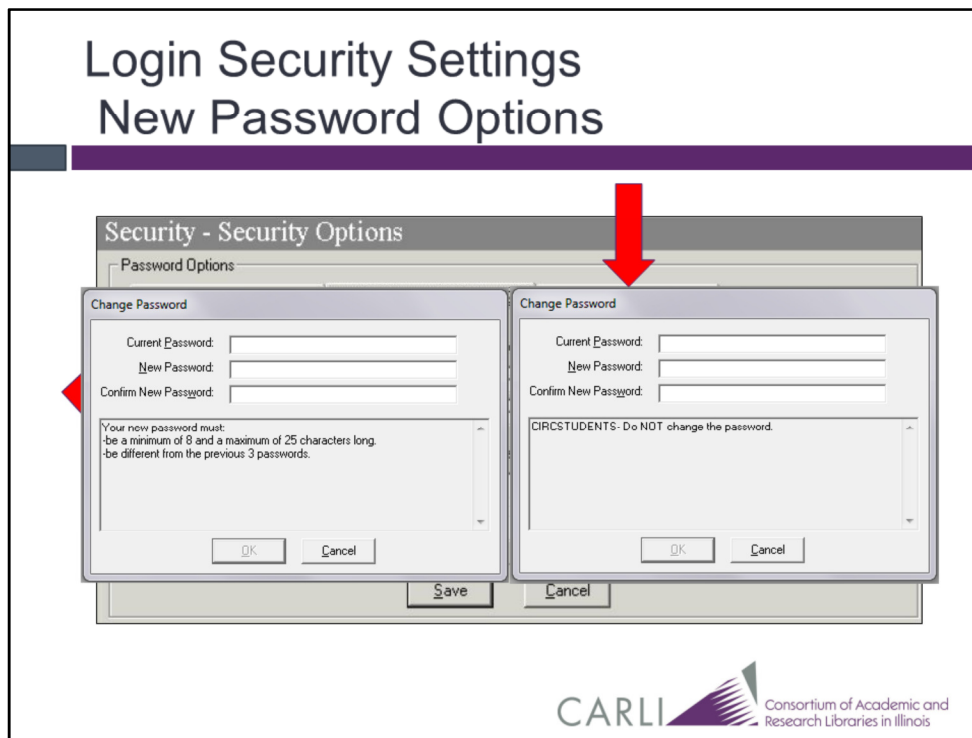
At least 1 special character/symbol(s)

Special / symbol: |@#%&\*~?^!.,=-\_

Save Cancel

This screenshot is from SysAdmin > Security > Security Options. It shows the first Tab of the new Password security settings.

Here you can see the first set of possible password requirements.



The second Tab of the Password Requirements has more granular settings for account lockout following invalid login attempts.

The third tab will record an audit log of invalid login attempts. <<<click>>>

This Password Requirements second tab is also where you customize the text that will be shown on the change password screen in all of the Voyager Clients.

>>>click<<< This is the default, out of the box message.

You could add wording to the “Change password” screen that warns those logging in with a “generic” username NOT to change the password.

While they will not be prevented from changing the password, they will have been warned.

<<<click>>> This is an example of a customized warning. This same message will show in all of the Voyager clients, so your library staff may want to decide on the wording together.

## 2: Overall Settings Session Preferences

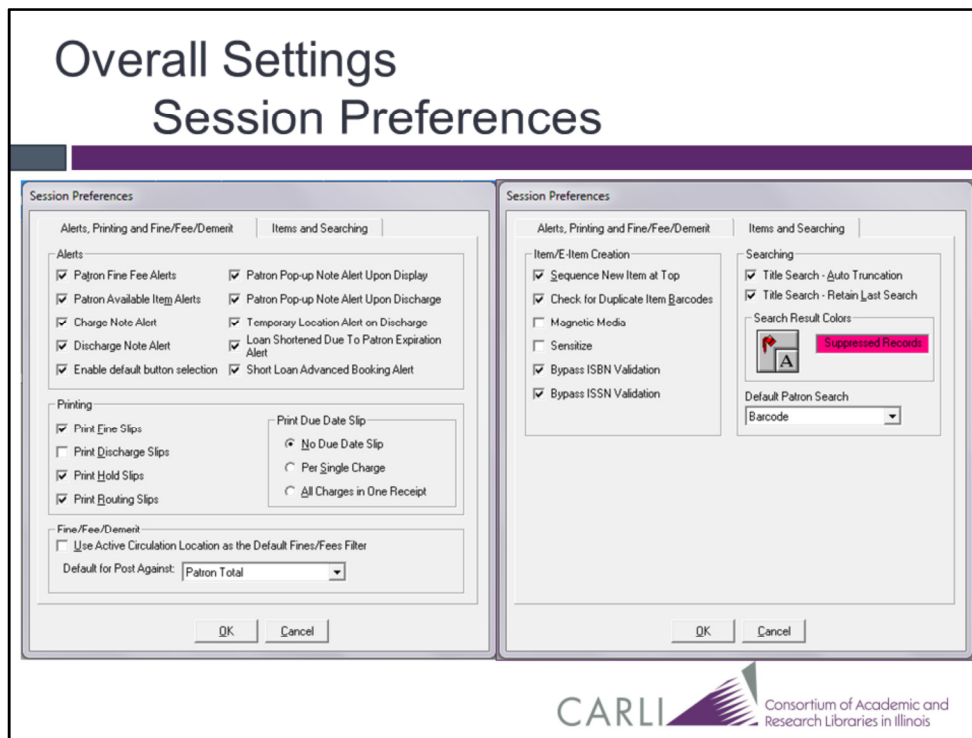
The screenshot shows a dialog box titled "Session Preferences" with several sections of settings:

- Item/E-Item Creation:**
  - Sequence New Items at Top
  - Check for Duplicate Item Barcodes
- Searching:**
  - Auto Truncation
  - Retain Last Search
- Fine/Fee/Demerit:**
  - Use Active Circulation Location as the default fines/fees filter
- Alerts:**
  - Patron Fine Fee Alerts
  - Patron Available Item Alerts
- Standard Number Validation:**
  - Bypass ISBN validation
  - Bypass ISSN validation
- Printing:**
  - Print Due Date Slips
  - Print Fine Slips
  - Print Discharge Slips
  - Print Hold Slips
  - Print Routing Slips
- Search Result Colors:**
  - Suppressed Records (highlighted in pink)

Buttons: OK, Cancel

Moving now into our topic of “Overall Settings”, you’ll hear me mention updates to some preferences throughout the remainder of this webinar.

Version 7.2.5 of Voyager has a single page set of Session Preferences, seen here; with the Voyager Upgrade there will be two tabs of preferences.



With these additional options, there also comes some inconsistency.

Some of the settings on these two tabs are truly “Session Preferences”. This means that any changes made while logged in are reset when you log out to the default determined in Voyager System Administration.

Other settings are NOT truly session preferences. They persist from one login to the next.

Following some more testing, I will create a document to highlight which preferences persist, and which reset when you logout.

Once created, I will post this document to the CARLI upgrade webpage.

Following the June upgrade, the document will be linked with the other Circulation documentation on the CARLI website, so that you may refer back to it later as needed.

# Overall Settings

## Disable Smart Defaults

The screenshot shows the 'Session Preferences' dialog box with the 'Alerts, Printing and Fine/Fee/Demerit' tab selected. The 'Alerts' section contains several checkboxes, all of which are checked. The checkbox for 'Enable default button selection' is highlighted with a red rectangular box. Below the 'Alerts' section are sections for 'Printing' and 'Fine/Fee/Demerit'. The 'Printing' section has checkboxes for 'Print Fine Slips', 'Print Discharge Slips', 'Print Hold Slips', and 'Print Booking Slips', all checked. There are also radio buttons for 'Print Due Date Slip' (selected), 'Per Single Charge', and 'All Charges in One Receipt'. The 'Fine/Fee/Demerit' section has a checkbox for 'Use Active Circulation Location as the Default Fines/Fees Filter' which is unchecked, and a dropdown menu for 'Default for Post Against' set to 'Patron Total'. At the bottom are 'OK' and 'Cancel' buttons.

A new overall session preference is the ability to disable smart defaults.

Many alerts display in the Circulation client during the course of normal workflows.

By default, these alerts have some action preselected, which enables the operator to quickly acknowledge the alert or take a default action.

However, these defaults can lead to incomplete transactions when an operator is not paying attention.

Unchecking the “Enable default button selection” checkbox will force the operator to acknowledge alert messages.

Library staff can disable the default button selection in the Session Preferences.

To disable the default buttons, remove the check box selection for “Enable default button selection”.

### 3. Item Records

- Suppressed Records: Call Number Search Results
- Pop-up Charge and Discharge Notes for Item Records
- Sort Items on the Item Display

This slide shows an overview list of the Item Record-related changes coming with Voyager 9.1.1, we'll discuss these specific changes on the following slides.

# Item Records

## Suppressed Records



The Voyager clients display suppressed records in call number search results.

Now, suppressed records will be highlighted in those results based on the library staff member's preference setting.

This is not a TRUE session preference; this setting does NOT reset when you log out.

This slide shows the setting in the client preferences; the next slide will show example highlighting.



## Item Records Suppressed Records

Titles Index

Font: Arial Black Sort By:

Call Number	Full Title	Date	Format
LB1027.28 .B641997	Classroom observer : developing observation skills in early childhood settings / Ann E. Boehm, Richard A. Weinberg ; foreword by Jeanne Brooks-Gunn.	1997	Book
LB1027.28 .C87 2000	Art of awareness : how observation can transform your teaching / by Deb Curtis and Margie Carter.	2000	Book
LB1027.28 .M45 2002	Thinking like a teacher : using observational assessment to	2002	Book

OK Cancel Search

61 Records Found Search: Call Number=LB 1027



As you can see on this slide, suppressed records are highlighted in **pink, based on my preferences.**

While we're on this slide, I thought I'd point out the one option in the Circulation Client for adjusting the font.

<<<click>>>

On this second screenshot of item records, I've noted the "Font" drop-down menu in the item search box. You can see change.

There are limited locations in the client where this change displays, but it can be helpful to know about nonetheless. This change persists from one session to the next.

For reading diacritics and other fancy characters in the bib titles, Arial Unicode MS or Lucida Sans Unicode are good font choices, but you may choose any font as desired for readability.

## Item Records Pop-Up Charge and Discharge Notes

Notes

Barcode: 3260260146226060

Copy: 1

Enumeration:

Chronology:

Title: Listening : a framework for teaching across difference

Note Type: charge

Last Modified: 2015-05-12 22:48:14

Check pocket for 1 guide and 2 sets of notes.  
-DMC 01-05-2015

New Save Delete Close

CARLI Consortium of Academic and Research Libraries in Illinois

As an exciting feature, new pop-up item note types of “charge” and “discharge” have been added to Voyager.

These new note types pop-up when the items are Charged, Renewed, and Discharged.

Display of the alerts is controlled by a session preference within the Circulation client. By default, these alerts are turned on, but they can be disabled by library staff.

This is not a TRUE session preference; this setting does NOT reset when you log out. If you disable this setting, please remember to re-enable it.

These notes could be ideal for recording item damage, a description of the included pieces to check for, warnings about non-typical replacement pricing, or other item-specific messages for local circulation staff.

If you want the note to display both at Charge and Discharge, you will need to add one note of each type, with the same content.

The regular item note (the non-pop-up, that you are used to) is still available and will

continue to function in the same way.

If you are satisfied with a current workflow relating to item notes, you do not need to change it.

Circulation staff will see two pop-ups if the item has BOTH a “number of pieces note” AND a charge or discharge note.

The number of pieces note pops up first, followed by the charge or discharge note.

Item notes remain visible ONLY to the item’s home library; I-Share institutions cannot see another library’s item notes.

**<<<click>>>**

A “Last Modified” field identifies the most recent date and time the item note was added or updated; it is still a good idea to include the initials of the staff member who is adding the note.

## Item Records Sort Item Display

The screenshot shows a window titled 'Item Record' with a title field containing 'Journal of conflict resolution.' Below the title field is a toolbar with icons for various actions. A table of item records is displayed below the toolbar. A red arrow points to the 'Location' column header, and a red box highlights the table headers. The table has the following data:

	Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
1	Periodicals Room	periodical	Not Charged	v. 1	no. 1 Jan. 20 2005	1	2005
2	Periodicals Room	serial	In Process+	v. 43, no. 4	2000 Apr.	1	
3	Periodicals Room	serial	At Bindery+	v. 153, no. 2063 -- v. 153 -- 2007	(1997 Jan. 4 -- 1997 Feb.	1	153156

Library staff can now sort items on the item information display by clicking a column header. This is a simple feature which will be useful.

<<<click>>>

Clicking the header again re-sorts in reverse order.

<<<click>>>

<<<click>>>

A new column has been added to indicate the default sort order.

This column can be used to return the display to the original sort.

Sorting functionality is already present in our current version of Voyager in the "Patron Charged Items" Lists and in the patron's VuFind MyAccount pages.

You can sort the items that a patron has checked out by clicking on those headers.

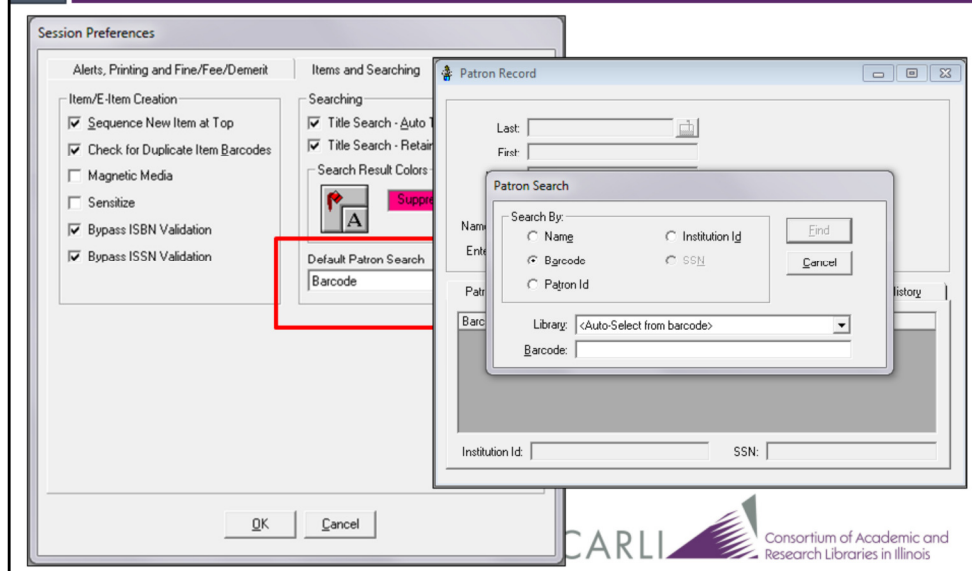
## 4. Patron Records

- Patron Search: Preferences
- Patron Search: Patron ID
- Patron Note Types: Pop-Up Note
- Patron Note Types: New Types
- Patron Information: Add Department, Major, and Birthdate
- Improved Functionality: Duplicating Patron Record
- Improved Functionality: Proxy Patrons



This slide shows a list of the Patron Record-related changes coming with Voyager 9.1.1, we'll discuss these specific changes on the following slides.

# Patron Records Patron Search



You can now set a default preference for the patron search in the session preferences. Previously, the default was always to search by Patron Name.

<<<click>>>

This next image shows the patron search in Voyager 9.1.1- my search defaulted to patron barcode as set in my preferences.

This is not a TRUE session preference; this setting does NOT reset when you log out. If you disable this setting, please remember to re-enable it.

## Patron Records Patron Search

The screenshot shows a 'Patron Search' dialog box. It features a 'Search By:' section with five radio button options: 'Name', 'Barcode', 'Patron Id', 'Institution Id', and 'SSN'. The 'Barcode' option is currently selected. A red rectangular box highlights the 'Patron Id' option. To the right of these options are 'End' and 'Cancel' buttons. Below the search options is a 'Library:' dropdown menu set to '<Auto-Select from barcode>' and a 'Barcode:' text input field.

Additionally, a new option has been added to the patron search window so that library staff may search for patrons by Patron ID.

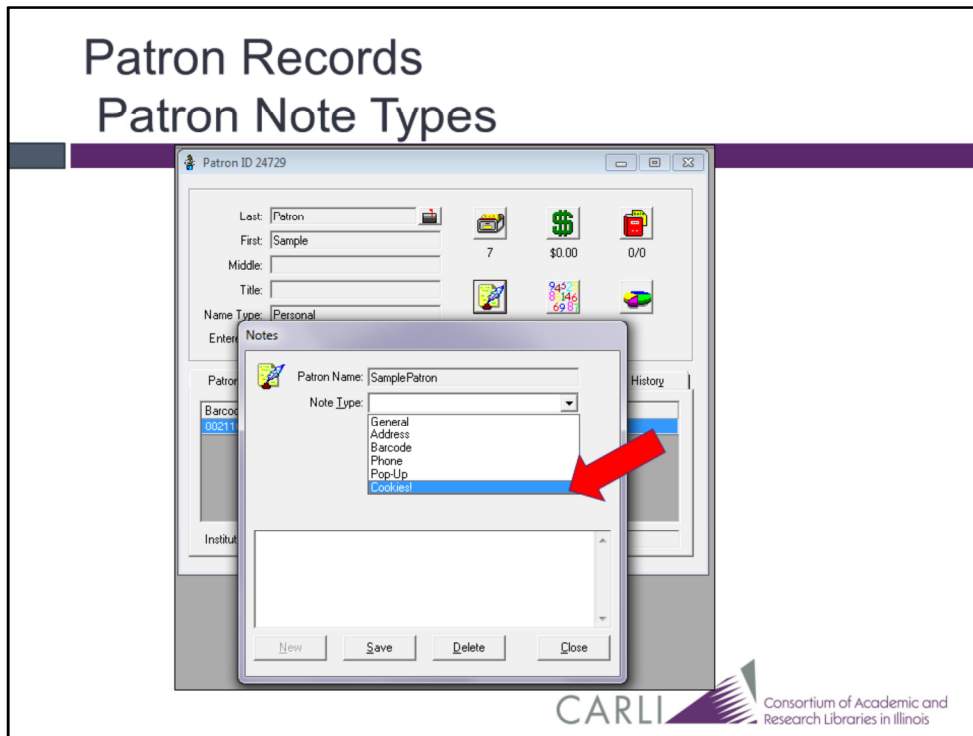
While this probably will not be useful to most circulation staff on a daily basis, for those of you who work with Voyager Access Reports it will likely come in handy.

The PATRON\_ID is incrementally assigned by Voyager for each new patron record added to the system; it's an "internal" number.

The PATRON\_ID remains consistent as long as the patron record remains in Voyager, while other fields, such as barcode, name, or institution ID can be edited by library staff.

# Patron Records

## Patron Note Types



With the upgrade, libraries can define new patron notes types in System Administration.

Once the note type has been created, it displays in the note type dropdown within Circulation and can be used by library staff to add notes to any patron record.

This configuration option allows you to create, edit, and delete your own custom note types and view the complete list that includes the following system-provided types:

- Address
- Barcode
- General
- Phone
- Pop-Up

<<<click>>>

Note that any new note type added is NOT a pop-up note. So my note type of Cookies is only visible if a staff member clicks on the patron note icon to read it.



**Regarding Patron Pop-up Notes:** The patron pop-up note will now display whenever the patron record is retrieved. Previously, the patron pop-up note was displayed only when the patron record was retrieved in the Charge window.

A preference setting can be selected to allow the Patron Pop-up notes to display when a charged item is discharged.

This is not a TRUE session preference; this setting does NOT reset when you log out.

Remember, patron notes are ONLY visible to the patron's home library; I-Share institutions cannot see another library's patron's notes.

# Patron Records

## Patron Information

Patron ID 24729

Last: Patron  
First: Sample  
Middle:  
Title:  
Name Type: Personal  
Entered At:

8 \$0.00 0/0  
0 945 146 62

Patron Id | Details | Address/Phone | Counters | Proxy Patrons | History

SMS Number:  
Expires: 1/31/2016 Purge: 1/31/2016  
Department: Biology  
Major: Molecular  
Birth Date: 5/12/1993

CARLI Consortium of Academic and Research Libraries in Illinois

An enhancement has been made to record the patron's department <<<click>>>, major<<<click>>>, and birthdate<<<click>>> in the patron profile.

The SIF file has not changed, so this information cannot be added using the current Patron Batch Load process.

The XML patron loader has the option to include the new fields.

As mentioned in the first "Upgrade Basics" webinar, CARLI is still investigating the XML patron loader.

<<<click>>> I'll briefly talk about SMS Numbers later in this presentation.

# Patron Records

## Patron Information

**Edit Patron Record**

Name | **Details** | Barcode | Address | Phone

SMS Number:

Expires: 1/31/2016 [...] Purge Date: 1/31/2016 [...]

Department:

Major:

Birth Date:

**Patron Record**

**Name**  
Sample Patron

**Details**

**Barcodes <new>**  
FACULTY: Active

**Addresses <new>**  
Permanent

**Phone Numbers <new>**  
Primary: 4343434343

EMail 1/30/2015 - 1/31/2016

Save Delete OK

The new patron information fields we just saw in the patron record can be added manually.

They are located on the new Details tab within the “add or edit patron record” windows.

# Patron Records

## Patron Information

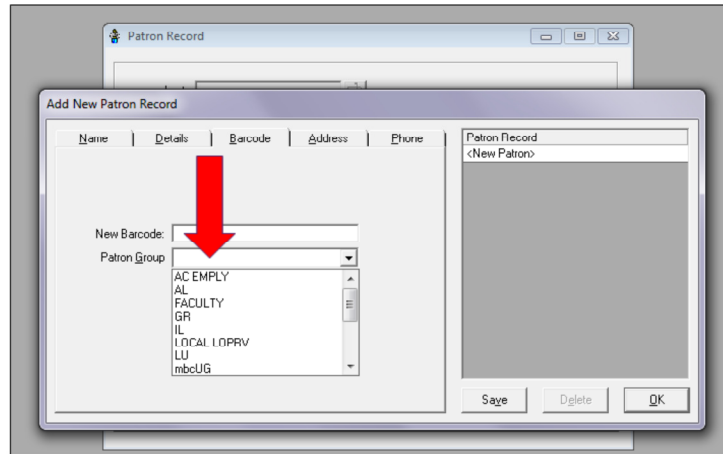
The screenshot shows a software window titled "Edit Patron Record" with a tabbed interface. The "Name" tab is active, displaying input fields for Last (Patron), First (Sample), Middle, Title, Name Type (Personal), Institution Id (053330533305333), and SSN (xxx - xx - xxxx). A summary pane on the right shows "Patron Record" with "Name: Sample Patron", "Details: FACULTY: Active", "Addresses <new>: Permanent", "Phone Numbers <new>: Primary: 333343434", and "EMail 1/30/2015 - 1/31/2016". Buttons for "Save", "Delete", and "OK" are at the bottom.

Since the Expiration and Purge date information was moved onto the Details tab of the "Add Edit Patron Record" window, the "Name Tab" is now different.

You'll want to update any training documentation or handouts that you have created for your library's staff on manually adding or editing patron records.

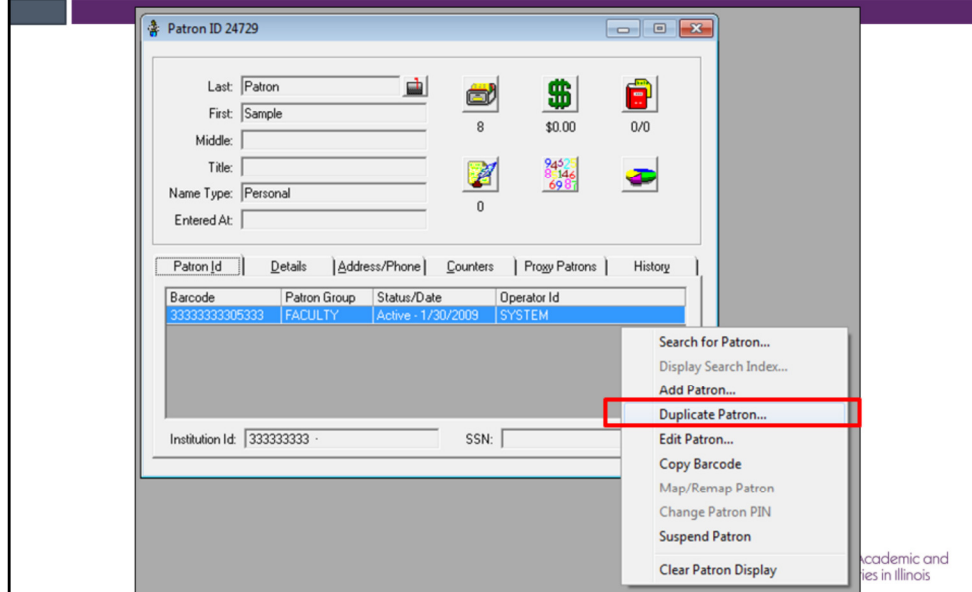
# Patron Records

## Patron Information



On the barcode tab, the patron group drop-down menu is now listed in alphabetical order!

## Patron Records: Improved Functionality Duplicating Patron Records

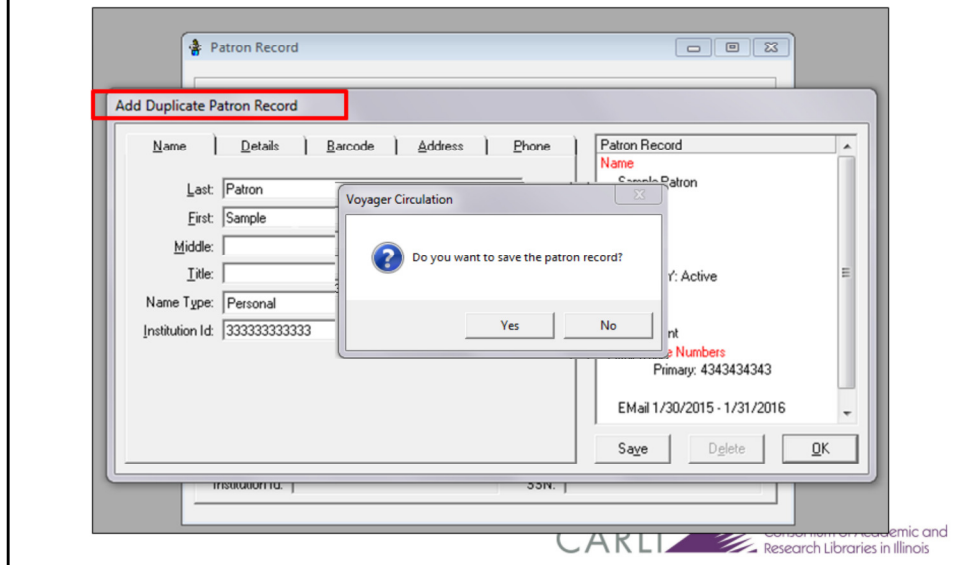


New "Duplicate Patron Record" functionality allows a library staff member to manually copy a patron record, to create a new patron record.

Now, this is an interesting enhancement with the potential for good and evil.

To duplicate a patron record, you retrieve the record you'd like to copy, and then right click to select "Duplicate Patron".

## Patron Records: Improved Functionality Duplicating Patron Records



This could be useful when manually adding patrons who all have similar information-like from within a family (with the same address), or a group of people living in the same campus housing.

But it is fraught with the possibility for error, so be careful!

Make sure that you do not accidentally enter duplicate records for the same patron, or to accidentally give multiple patrons the same barcode number or institution ID.

If you right click to add a duplicate patron record, and then change your mind, go ahead and click OK. Then a second screen should ask

**<<<click>>>**

“Do you want to save the patron record?” click NO to cancel the duplication.

## Patron Records: Improved Functionality Proxy Patrons



<https://flic.kr/p/bHW3H8>

- When a patron barcode is deleted, any associated proxy relationships are fully removed.
- Yay!

**Regarding Proxy Patrons:** Previously, if a proxy's barcode was deleted, the sponsor barcode was orphaned. This prevented the sponsor's patron record from being able to be deleted.

Ex Libris fixed the code to remove all proxy and proxy sponsor relationships (including any expired proxy relationships) related to the selected barcode.



## 5. Basic Circulation Functions: Charging

### Charging

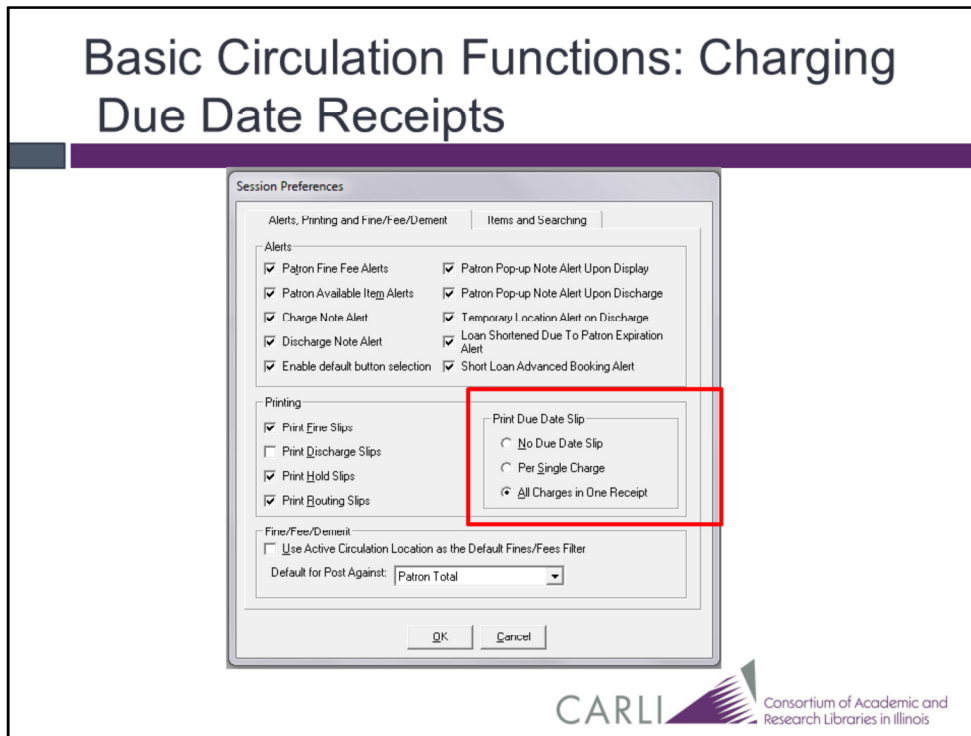
- Due Date Receipts by Charge Session
- Modify Due Date from Charged Items Index
- Check Calendar When Modifying Due/Return Date
- Alert when Loan Period Shortened due to Patron Record Expiration Date
- Overnight Loan Functionality



This slide shows a list of the basic circulation functions: charging-related updates coming with Voyager 9.1.1

We'll discuss these specific changes on the following slides.

## Basic Circulation Functions: Charging Due Date Receipts



A new setting has been added to the preference menu so that library staff can print a single due date slip for all items charged in a single session.

This provides the ability to toggle between three due date slip printing options: No Due Date Slip, Per Single Charge, All Charges in One Receipt.

This IS a TRUE session preference; the settings revert back to the default set in Voyager SysAdmin with each logout.

## Basic Circulation Functions: Charging Modify Due Date

The screenshot shows the 'Charged Items Index' window in the Voyager library system. The window title is 'Charged Items Index' and it displays a search for 'DEBORAH MARIE CAMPBELL' with a total of 3 items. A table lists the items with columns for Title, Call Number, Item Location, Item Type, Item Barcode, Due Date, and Status. A 'Modify Due Date...' dialog box is open over the table, allowing the user to set a new date and time. The dialog box has fields for 'Date' (set to 5/12/2015) and 'Time' (set to 11:15 PM), with 'OK' and 'Cancel' buttons. The table has three rows, with the third row selected. The buttons at the bottom of the window are 'Item Info...', 'Print', 'Select All', 'Discharge', 'Modify Due Date...', 'Renew', and 'Close'.

Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Kurt Vonnegut's crusade, or, How a postmodern harlequin preached a new kind of humanism / Todd F. Davis.	PS3572.05 Z65 2006	DP Stacks	Book	33211001630395	6/9/2015 09:00 AM	Charged 5/12/2015
Voices for the future : essays on major science fiction writers / Thomas D. Clareson, editor.	PN3448.S4 5 C55	DP				Charged 5/12/2015
Vonnegut : a preface to his novels / Richard Giannone.	PS3572.05 Z68	DP				Charged 5/12/2015



In our current version of Voyager, the due date can only be modified in the charge screen, at the time an item is charged or renewed.

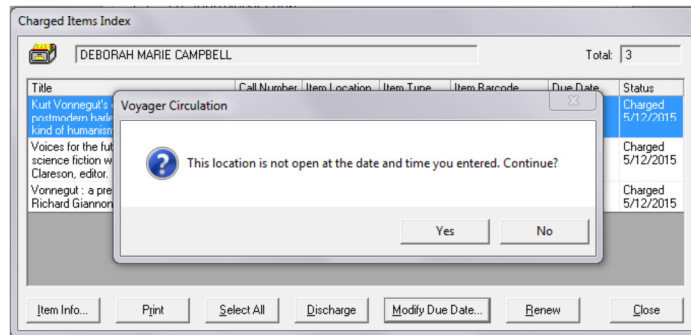
It is now possible for an authorized circulation operator to modify the due date on one or more items already charged to a patron.

To use this feature, select one or more items in the Charged Items Index display and right-click one of the entries.

A Modify Due Date window will open and the operator can set the specific due date and time for the item.

NOTE that the patron does NOT receive a notice of this modified due date.

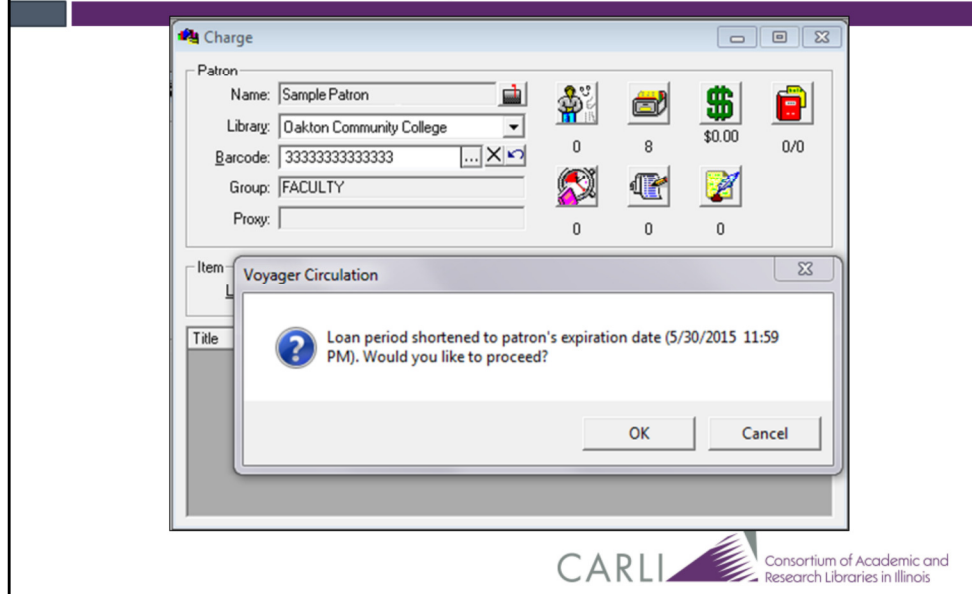
## Basic Circulation Functions: Charging Check Calendar for Modify Due Date



When modifying a due date, either from the charge window or from the patron's charged item index, a new enhancement will alert the circ operator if the manually-entered due date is outside the library's operating hours as reported in the Circulation Calendars.

This screenshot shows the error message which says, "This location is not open at the date and time you entered. Continue?"

## Basic Circulation Functions: Charging Alert when loan period shortened...



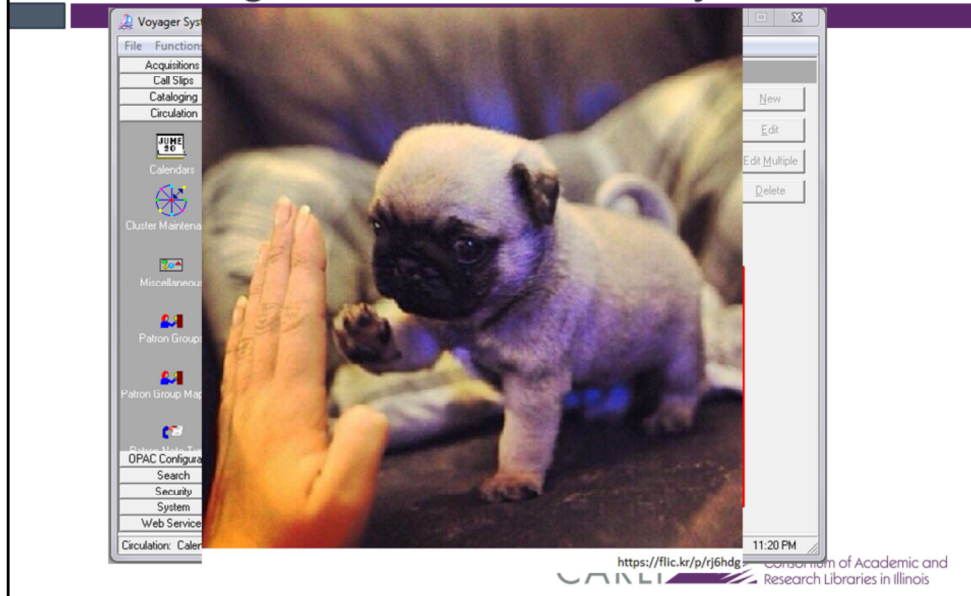
An additional new pop-up alert will notify the circ operator when an item's loan period has been shortened due to the patron's expiration date.

The patron's expiration date is shown, and the operator is able to proceed with or cancel the transaction.

The alert for the "Loan Shortened Due to Patron Expiration Date" is controlled by a preference setting in the File> Preferences menu.

This is not a TRUE session preference; the settings do NOT reset when you log out. If you disable this setting, please remember to re-enable it.

## Basic Circulation Functions: Charging Overnight Loan Functionality



While the “Overnight Loan” functionality has been present in Voyager for a long time, it has not correctly calculated the due dates/times.

With the upgrade, if a library uses the Overnight Loan functionality, the loan periods should be calculated as expected for hourly and minute loans.

<<<click>>>

Setup will be discussed in the SysAdmin webinar.

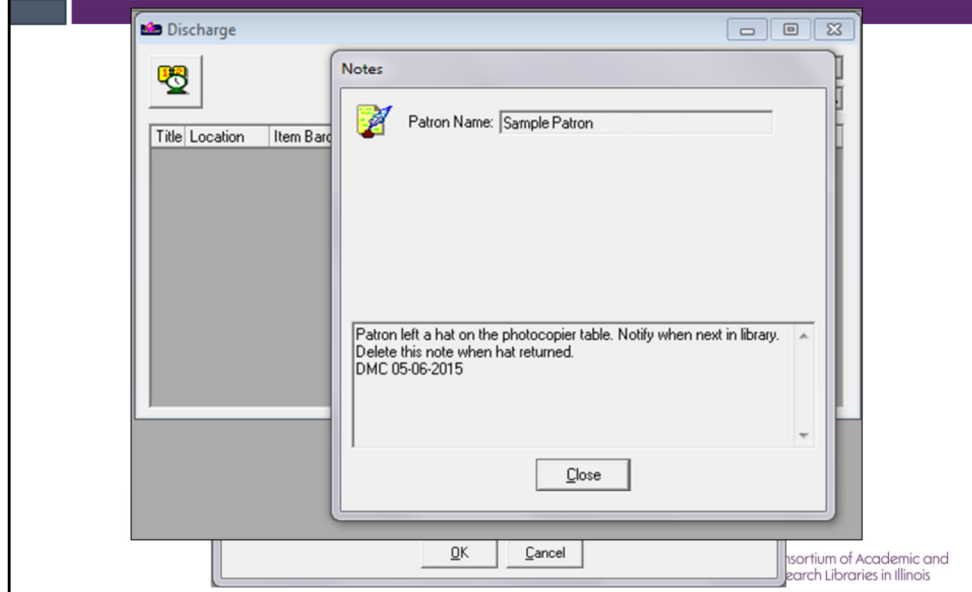
## Basic Circulation Functions: Discharging

### Discharging

- Show Patron Pop-up Notes Upon Discharge
- Display Item's Location in the Discharge Window
- Record "Browse" Date and Time
- Remove Fines/Fees When Lost Item Is Discharged

This slide shows a list of the basic circulation functions discharging-related changes coming with Voyager 9.1.1, we'll discuss these specific changes on the following slides.

## Basic Circulation Functions: Discharging Patron Pop-Up Notes upon Discharge



Mentioned briefly in the patron record section of this webinar, a new session preference allows the user to view a patron pop-up note when an item is discharged.

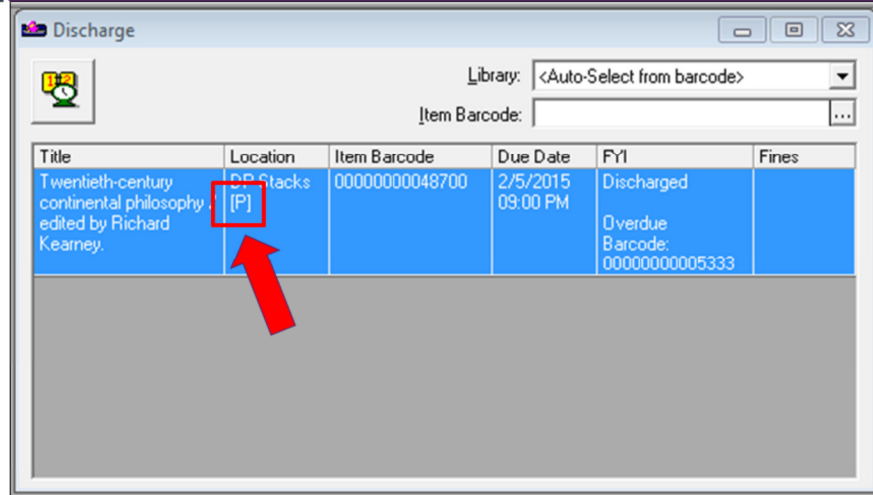
<<<click>>>

This may or may not be useful depending on how pop-up notes are used at your library, or how your patrons return charged materials.

This is not a TRUE session preference; the settings do NOT reset when you log out. If you disable this setting, please remember to re-enable it, if desired at your library.



## Basic Circulation Functions: Discharging Display Item Location



Discharge

Library: <Auto-Select from barcode>

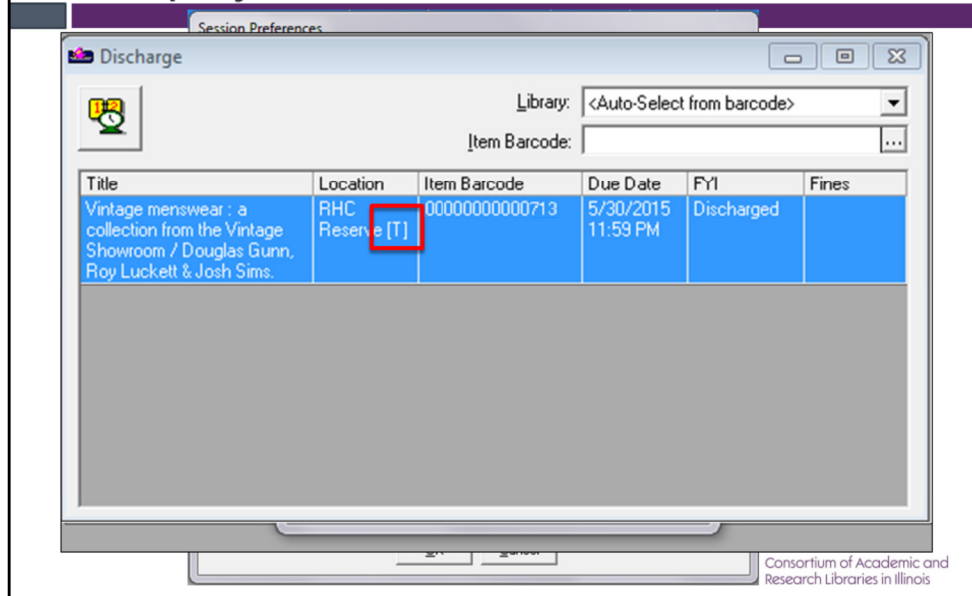
Item Barcode: ...

Title	Location	Item Barcode	Due Date	FYI	Fines
Twentieth-century continental philosophy edited by Richard Kearney.	PP Stacks [P]	00000000048700	2/5/2015 09:00 PM	Discharged  Overdue Barcode: 00000000005333	

A new feature will display the item's current shelving location in the Discharge window.

A [T] or [P] displays with the location to indicate the item should be returned to a temporary or permanent shelving location.

## Basic Circulation Functions: Discharging Display Item Location



Additionally, a new pop-up Alert can be displayed to tell the operator when the discharged item should be reshelved in a temporary location.

The alert for notifying library staff of a temporary item shelving location is determined by Preferences in the Circulation Client.

This is not a TRUE session preference; the settings do NOT reset when you log out. If you disable this setting, please remember to re-enable it.

<<<click>>>

After acknowledging the Temporary Location alert, the current location of this item is then displayed in the Discharge window.

<<<click>>>

## Basic Circulation Functions: Discharging Record Browse Date and Time



<https://flic.kr/p/ad8Xje>

- Ability to save the date and time for browse transactions.
- Yay!



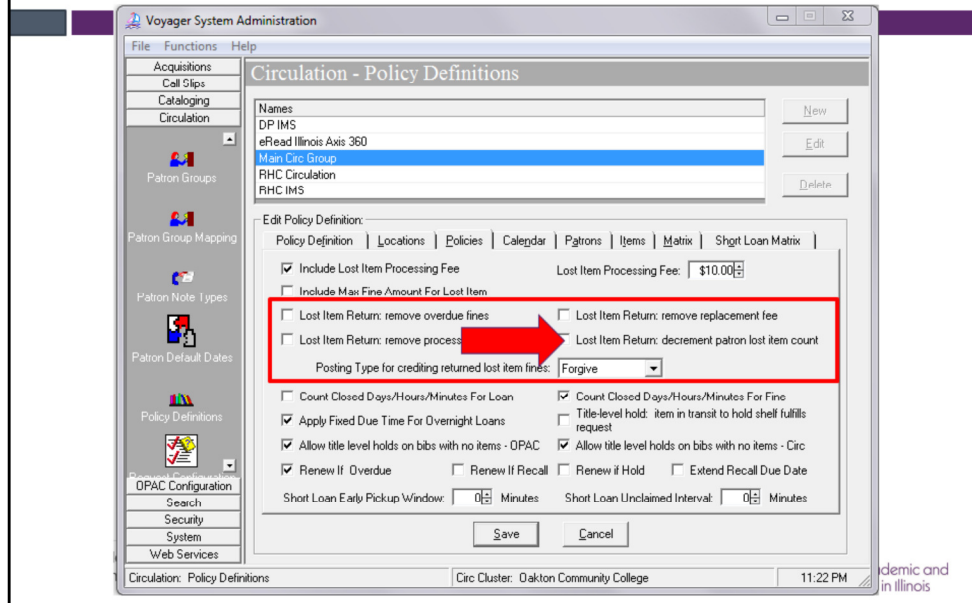
Enabling a new SysAdmin setting will make it possible to save the date and time for browse transactions.

While this enhancement cannot retroactively enter previous browse dates, once enabled, the browse date and time will be recorded going forward.

This could be useful for recording usage of non-circulating material that is discharged before being reshelfed.

The CARLI Access Reports webinar on Tuesday June 2<sup>nd</sup> and the SysAdmin webinar on Thursday May 28<sup>th</sup> will discuss this setting in more depth.

## Basic Circulation Functions: Discharging Remove Fine/Fees for Lost Items



New enhancements allow authorized circ operators the opportunity to automatically adjust a user's fines and fees and the lost item counter when a lost item is returned.

This screenshot shows the Voyager System Administration screen where these options are configured for the Circ Happening Location. By default, they are not enabled.

Additional security settings allow you to configure which specific Circ Operators have the ability to perform these tasks at the time of discharge. These SysAdmin settings will be discussed more during the System Administration webinar.

We'll discuss what some example workflows using these options could look like in Circ on the next few slides.

The three sample workflows in this presentation, showing these settings, represent the steps you could take with YOUR library's items.

CARLI staff will update the "Lost Item Best Practices" to reflect these new settings, including how they should be used for lost I-Share material.

<<<click>>>

The “Lost Item Return: decrement patron lost item count” setting will be valuable for streamlining these processes.

## Basic Circulation Functions: Discharging Remove Fine/Fees for Lost Items

- Steps for Circulation Staff with these **permissions not enabled** in security look like the current Voyager 7.2.5 steps.
- These staff members would follow your current workflow for dealing with lost items.

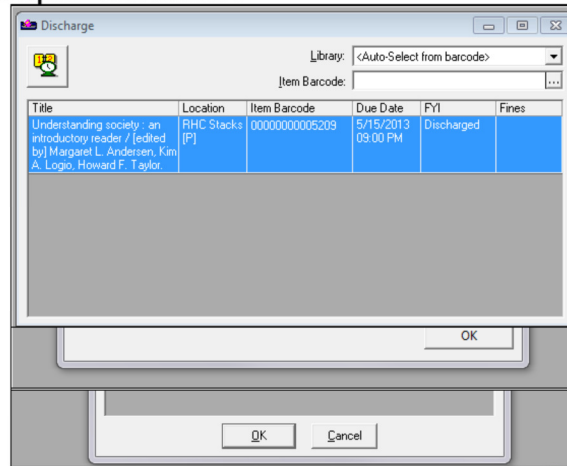


This first workflow shows steps for circulation staff where these permissions are NOT enabled in the SysAdmin Security profile.

These staff members would follow your current workflow for dealing with lost items.

## Basic Circulation Functions: Discharging Remove Fine/Fees for Lost Items

- Example workflow:



CARLI Consortium of Academic and Research Libraries in Illinois

### Example workflow for an operator without these fine/fee removal permissions.

Note that in this workflow, the example library has an alert enabled to show when a patron has fines/fees.

Your library may or may not have this alert enabled at your Circ Happening Location.

The item barcode is entered in the Discharge Screen. An item block notifies the staff member that the item is lost.

<<<click>><<<click>>>

The library staff member is prompted to decide whether to remove the status or not.

Maybe at this point, for example, you decide to still have library student workers click "Cancel" and place the item on a supervisor's desk. That supervisor may have more of the security permissions enabled.

<<<click>><<<click>>>

Due to that aforementioned circ alert, the library staff is informed that the patron has fines/fees/demerits.

<<<click>><<<click>>>

They receive a second warning about outstanding fines and fees, due to the fines and fees NOT being removed by the new settings.

<<<click>><<<click>>>

The item is now discharged. The fines and fees are still applied to the patron record and the lost item counter was NOT decremented.



## Basic Circulation Functions: Discharging Remove Fine/Fees for Lost Items

- Steps for Circulation Staff **with all permissions enabled** in security.
- These staff members would follow an updated workflow at your library.



This second workflow shows steps for circulation staff where these fine/fee removal permissions are ALL enabled in the SysAdmin Security profile.

These staff members would follow an updated workflow for dealing with lost items.

## Basic Circulation Functions: Discharging Remove Fine/Fees for Lost Items

- Example workflow:

Title	Location	Item Barcode	Due Date	FYI	Fines
Invisible children in the society and its schools / edited by Sue Books.	RHC Stacks [P]	0000000000003	2/19/2010 06:30 PM	Discharged	

Consortium of Academic and  
Research Libraries in Illinois

Note that in this workflow, the example library has an alert enabled to show when a patron has fines/fees.

Your library may or may not have this alert enabled at your Circ Happening Location.

<<<click>>>

The item barcode is entered in the Discharge Screen. An item block notifies the staff member that the item is lost.

<<<click>>><<<click>>>

The library staff member is prompted to decide whether to remove the status or not.

<<<click>>><<<click>>>

Due to that circ alert, the library staff member is informed that the patron has fines/fees/demerits.

<<<click>>><<<click>>>

They are presented with the new options to remove the associated fines/fees and to reset the lost item counter. In this example, they keep all four options selected.

<<<click>>>

The item is now discharged. The fines and fees are all forgiven and the lost item counter is decremented.

## Basic Circulation Functions: Discharging Remove Fine/Fees for Lost Items

- Steps for Circulation Staff **with some permissions enabled** in security.
- These staff members would follow an updated workflow at your library.

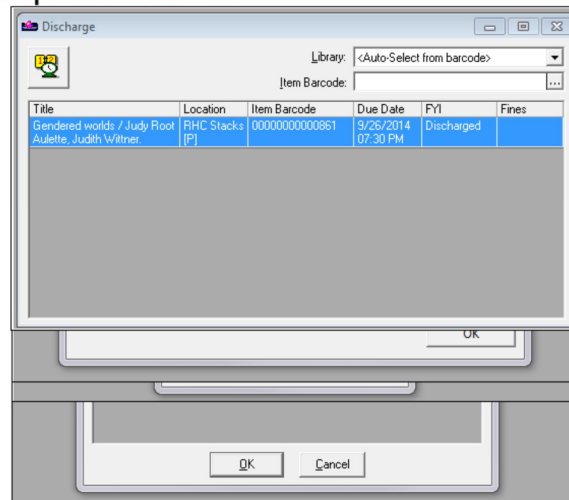


This third example workflow shows steps for circulation staff where some of the permissions are enabled in the SysAdmin Security profile.

These staff members would follow an updated workflow for dealing with lost items.

## Basic Circulation Functions: Discharging Remove Fine/Fees for Lost Items

- Example workflow:



Consortium of Academic and  
Research Libraries in Illinois

### Workflow for an operator with some security permissions.

Note that in this workflow, the example library has an alert enabled to show when a patron has fines/fees. Your library may or may not have this alert enabled at your Circ Happening Location.

<<<click>>>

The item barcode is entered in the Discharge Screen. An item block notifies the staff member that the item is lost

<<<click>>><<<click>>>

The library staff member is prompted to decide whether to remove the status or not.

<<<click>>><<<click>>>

Due to that aforementioned circ alert, the library staff member is informed that the patron has fines/fees/demerits.

<<<click>>><<<click>>>

This example takes into consideration a workflow where the library does not forgive the Lost Item Processing fines/fees when a lost item is discharged. As such, the SysAdmin settings are configured so that the library staff are presented with only 3 of the four new options at discharge. They can remove the associated Overdue Fine and Lost Item Replacement Fees and/or reset the lost item counter.

<<<click>><<<click>>>

Since the Item Processing Fee is still on the patron record, they receive a notification of outstanding fines/fees.

<<<click>>>

The item is now discharged. The fines and fees, except the Lost Item Processing Fee, are forgiven, and the lost item counter is decremented.

## Basic Circulation Functions: Discharging

### Many pop-ups possible!

- An item may have multiple alerts at discharge, each of which needs to be acknowledged. Examples:
  - Number of pieces
  - Patron pop-up notes
  - Item discharge note
  - Item temporary location alert
  - Item routing
  - Item fulfills holds or recalls
  - Exceptional status alerts (Lost-System Applied, etc.)
  - Fines and fees alerts
  - Other CIRC HAPPENING location alerts as determined by the SysAdmin settings.

<https://tic.kr/p/inebNP>

Depending on the alerts configured, an item may have multiple alerts at discharge, each of which needs to be acknowledged. Some examples of those pop-ups have been discussed during this webinar, others you may remember from using Voyager Circulation at your own library.

## 6. Fines and Fees

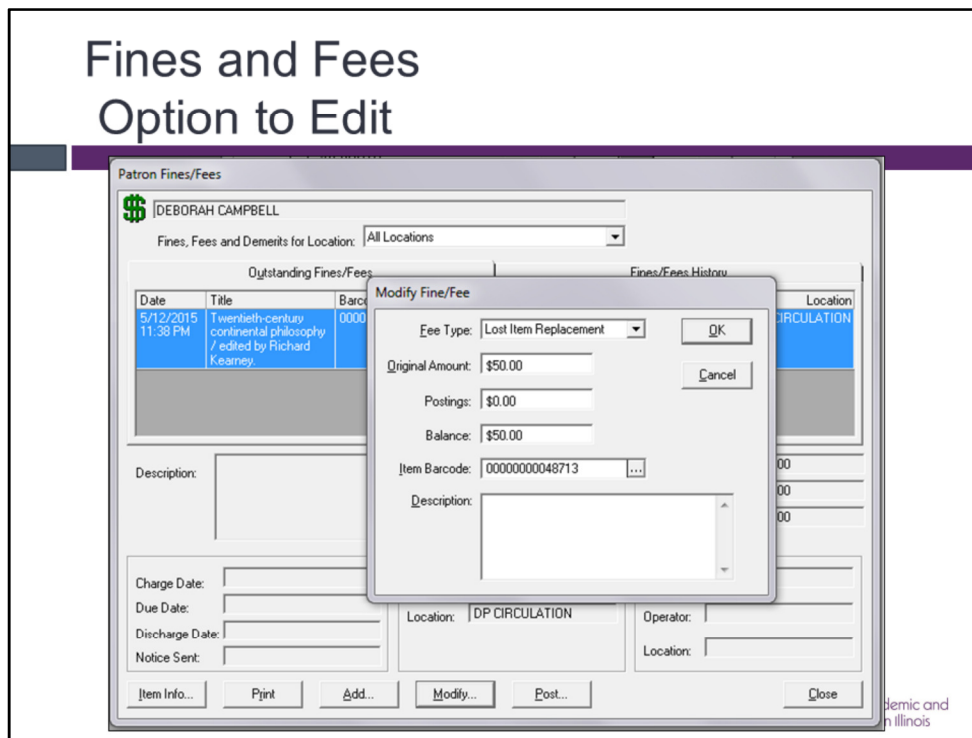
- Discharging: Remove Fine/Fees for Lost Items (discussed on previous slides)
- Option to Edit Fines/Fees
- Calculate the Sum When Posting Fines and Fees
- Default Setting for Posting Fines and Fees
- New Posting Types
- Display Notice Date in Fines and Fees Window
- Enhancements to Fine/Fee Notice and Statement of Fines and Fees



This slide shows a list of the Fines and Fees related changes coming with Voyager 9.1.1, we'll discuss these specific changes on the following slides.

Remember the Fine and Fee setting that we've already discussed, Remove Fine/Fees for Lost Items when Discharging.

## Fines and Fees Option to Edit



Authorized Circulation staff may now edit current fines and fees charged to a patron.

A 'Modify' button has been added to the Patron Fines/Fees window.

When clicked, the circ operator can update the fee type, original amount, item barcode, and description of an outstanding amount.

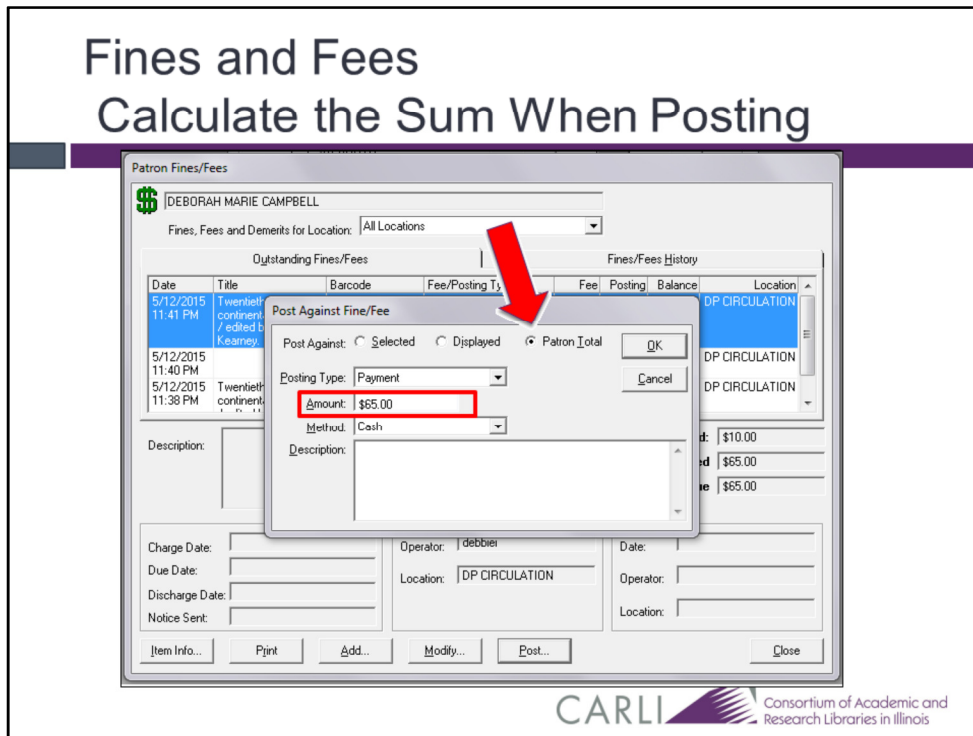
Note that historical (aka cleared or paid) fines and fees cannot be edited.

There is some SysAdmin setup needed for this new feature; that will be discussed in the System Administration webinar.



# Fines and Fees

## Calculate the Sum When Posting



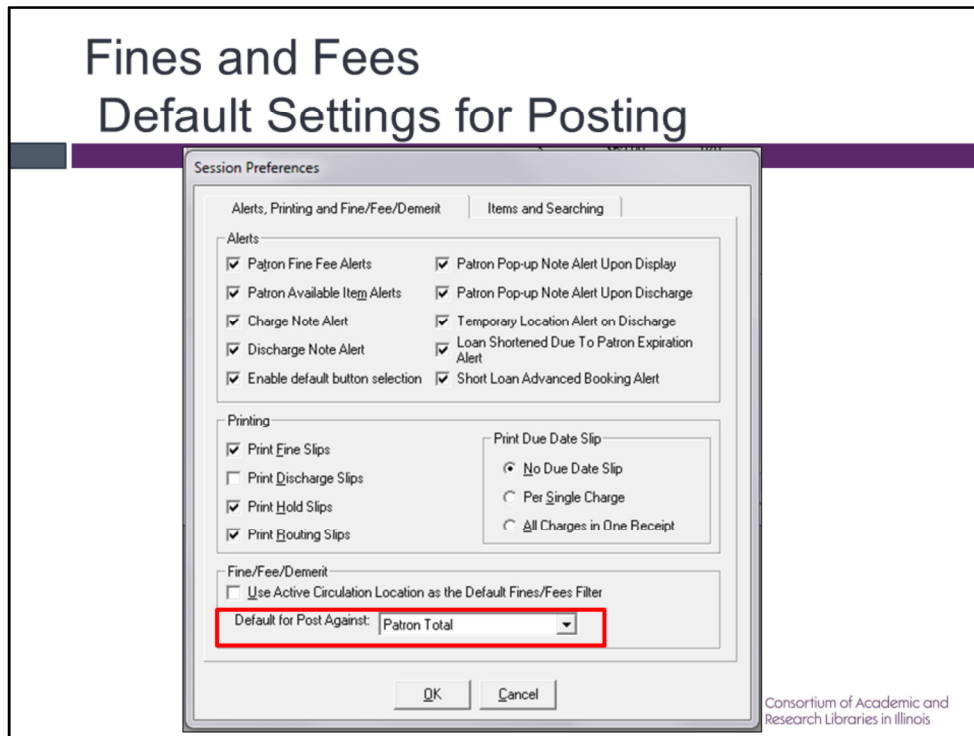
An authorized operator can easily post a transaction against selected amounts, displayed amounts, or the patron total by selecting the appropriate radio button.

I will now click to switch between the "Selected" and the "Patron Total". Notice that changing the radio button will automatically change the amount to be posted.

<<<click>>>

Once the operator has manually entered an amount, however, Voyager will not change the amount if a different radio button is chosen.

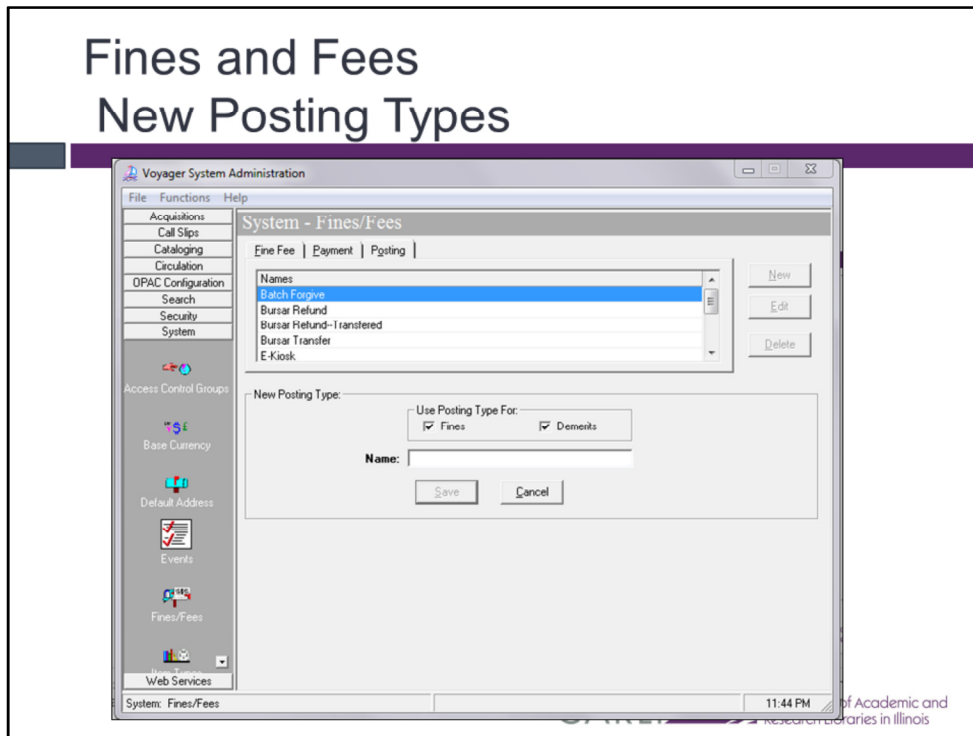
# Fines and Fees Default Settings for Posting



The “Default for Post Against” enhancement provides a user-defined preference for automatically selecting a radio button when working with a patrons’ fines and fees. The available choices are selected, displayed, or patron total.

# Fines and Fees

## New Posting Types



The “New Posting Type” enhancement allows the library to use new posting types in Circulation. Libraries can define new posting types in System Administration.

Once the posting type has been created, it displays in the posting type dropdown within Circulation and can be used for fines and fees or demerits.

Note that CARLI libraries do not use demerits.

# Fines and Fees

## Display Notice Date

Patron Fines/Fees

Sample Patron

Fines, Fees and Demerits for Location: All Locations

Outstanding Fines/Fees				Fines/Fees History			
Date	Title	Barcode	Fee/Posting Type	Fee	Posting	Balance	Location
1/17/2014 09:30 AM	Managerial accounting / Karen Wilken Braun, Wendy M. Tietz.	0000000002360	Overdue	\$1.00		\$0.00	DP CIRCULATION
1/17/2014 09:32 AM			Forgive		\$1.00		DP CIRCULATION
1/7/2014 07:47 AM	Harnessing AutoCAD 2012 / G.V. Krishnan, Thomas A. Stellman.	0000000000552	Overdue	\$10.00		\$0.00	DP CIRCULATION

Description:

Total Selected: \$0.00  
Total fines displayed: \$0.00  
Total Due: \$0.00

Charge Date: 1/3/2014 10:47 AM  
Due Date: 1/3/2014 10:49 AM  
Discharge Date:  
Notice Sent: 1/8/2014 01:35 AM

Create: Operator: jack, Location: DP CIRCULATION  
Modify: Date: , Operator: , Location:

Item Info... Print Add... Modify... Post... Close

The “Display Notice Date on Fines and Fees Window” enhancement does what it says; it displays the date of the billing notice on the Fines and Fees window.

The Notice Date has been added to both the Outstanding Fines/Fees and the Fines/Fees History tabs.

## Fines and Fees Enhancements to Notices & Statements

- Two new fields (“Due Date” and “Due Date when Fined”) have been added to the Fines and Fees notice and the Statement of Fines and Fees printed by Voyager’s Reporter module.
  - These additional fields apply to emailed versions of the notices as well.



Two new fields (“Due Date” and “Due Date when Fined”) have been added to the Fines and Fees Notice and the Statement of Fines and Fees.

These new due date fields are included in both the notices that print from the Voyager Reporter client, as well as the emailed version of the notices.

As discussed during the “Upgrade Basics” webinar, CARLI will review the enhancement and provide more information about changes to the Reporter configuration files needed to incorporate any modifications.

## Fines and Fees Bursar Transfer

- Enhancement: Logic has been added to the bursar transfer to extract records by fine and fee type.
- Enhancement: Filter bursar refund process based on input location and patron group configuration.
- Fix: The bursar refunds will not exceed the total bursar transfer.
- Fix: Bursar refunds may be able to transfer if the bib, MFHD, and item with the original fine has been deleted.



If your library uses the bursar transfer program to transfer local fines and fees to patron campus accounts, there have been some updates.

CARLI will create documentation about these enhancements and bug fixes for the Bursar Transfer process to post on the Voyager upgrade website.

## 7. Holds and Recalls

- Title Level Holds
- Comment Field
- Patron Name on Hold Slips

This slide shows a list of the Hold and Recall related changes coming with Voyager 9.1.1, we'll discuss these specific changes on the following slides.

## Holds and Recalls Title Level Holds

Place Request

Patron Information

Name: Sample Patron

Barcode: 3333333305333

Group: FACULTY

Library Administrative Request

Twentieth-century continental philosophy / edited by Richard Kearney. 0000000048713 copy 1

Request Type:

Hold  Recall  Call Slip  Request Storage  Short Loan

Title or Copy Level:

Title: For Items At: Any Location

Copy

Pickup At: DP CIRCULATION Expires: 6/11/2015

Comment:

OK Cancel

CARLI Consortium of Academic and Research Libraries in Illinois

When placing holds or recalls in the Voyager Circulation client on behalf of a library patron, or material for the library's reserves, the circ operator is provided with the option to place either a Title or Copy Level hold.

A copy level hold requires your library's exact copy, the exact item, to be returned for the hold or recall to be fulfilled.

A title level hold was supposed to allow any copy of your library's title to be returned for the hold or recall to be fulfilled.

In our current version of Voyager, placing a Title-level hold or recall can be glitchy and unpredictable. As such, CARLI has recommended only placing "Copy" level holds and recalls in our current version of Voyager.

With the Voyager upgrade, the Title-level hold and recall process has been updated so that when the first item is discharged to fulfill the hold, the hold is actually fulfilled. Woo-hoo! The hold or recall is then complete, and the other items associated with the title are no longer targeted by a duplicate request.



# Holds and Recalls Comments Field

ITEM ON HOLD	
Title:	Vintage menswear : a collection from the Vintage Showroom / Douglas Gunn, Roy Luckett & Josh Sims.
Author:	Gunn, Douglas.
Enumeration:	
Chronology:	
Copy:	1
Item Barcode:	
Item Being Held For:	
Patron:	Patron, Sample
Patron Barcode:	
Patron Phone:	4343434343
Hold Expires:	6/11/2015
Patron Comment:	This item is being recalled to put on reserve for TH315.

consortium of Academic and  
Research Libraries in Illinois

If a library staff member places a hold or a recall in the Circulation client for a patron or for the course reserves, and the staff member enters a comment in the “Comment” box for the request, that comment will now display in a pop-up alert when the item is discharged to fulfill the request. It will also print on the hold slip.

<<<click>><<<click>>>

Here’s an example of the comment displaying in a pop-up alert

<<<click>>>

Here’s an example of the comment displaying on the Hold Slip that prints from the Circulation client.

## Holds and Recalls Patron Name on Hold Slip

ITEM ON HOLD	
<b>Title:</b>	Vintage menswear : a collection from the Vintage Showroom / Douglas Gunn, Roy Lockett & Josh Sims.
<b>Author:</b>	Gunn, Douglas.
<b>Enumeration:</b>	
<b>Chronology:</b>	
<b>Copy:</b>	1
<b>Item Barcode:</b>	
<b>Item Being Held For:</b>	
<b>Patron:</b>	Patron, Sample
<b>Patron Barcode:</b>	
<b>Patron Phone:</b>	4343434343
<b>Hold Expires:</b>	6/11/2015
<b>Pickup At:</b>	RHC CIRCULATION
<b>Patron Comment:</b>	This item is being recalled to put on reserve for TH315.

consortium of Academic and  
Research Libraries in Illinois

If your library has the Circ Happening Alerts configured in Voyager SysAdmin to display the patron's name in the Discharge window when a hold is fulfilled, the name will now display in last name, first name format.

<<<click>>>

The patron's name will also now be displayed as last name, first name on a printed hold slip. This makes it easier to identify a patron's surname for organizing items on the hold shelf.

## 8. SMS Notices

- Short Message Service (SMS), aka Text messaging functionality, has been incorporated into Voyager for sending certain circulation notices to patrons.
- CARLI has no current plans to implement, but will test in the future.



Short Message Service (SMS), aka Text messaging functionality, has been incorporated into Voyager for sending certain circulation notices to patrons.

CARLI has no current plans to implement SMS, but will test the functionality in the future.

## 9. Pick and Scan

- With Pick and Scan, authorized users can make changes to one or more item, holdings, and/or bibliographic records in a single process.
- It's a powerful tool, with many new upgrades!
- Pick and Scan webinar, Thursday, May 21
  - Webinar will be recorded and posted to CARLI website.



With Pick and Scan, authorized users can make changes to one or more item, holdings, and/or bibliographic records in a single process.

Pick and Scan functionality is available in the cataloging client and the circulation client.

It's a powerful tool, with many new upgrades!

To learn more about it, please watch the Pick and Scan webinar, on Thursday, May 21.

The Pick and Scan webinar will be recorded and posted to CARLI website.

## 10. Voyager Media Scheduling Client and Short Loan Functionality

- The Voyager upgrade brings many new enhancements to the Voyager Media Scheduling Client and to the Short Loan Functionality.
- CARLI will create documentation about the enhancements to post on the Voyager upgrade website.

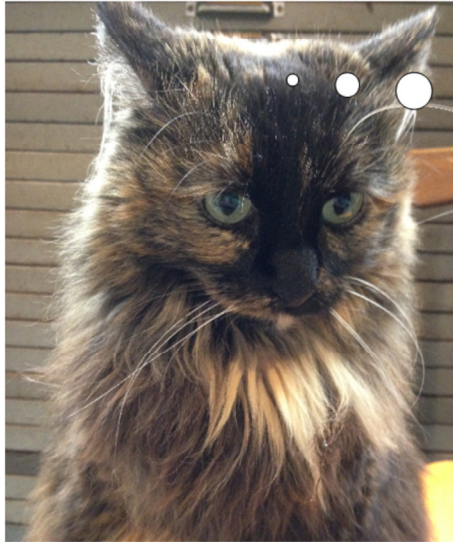


The Voyager upgrade brings many new enhancements to the Voyager Media Scheduling Client and to Short Loan Functionality.

CARLI will post documentation about these enhancements to the Voyager upgrade website.

When the documentation is ready, we will contact the I-Share Liaison at those libraries who use the Media Scheduling Client and/or Short Loans.

## Questions?



Please type any  
questions  
in the chat.

## Contact CARLI

- CARLI Main website:
  - <http://www.carli.illinois.edu/>
- Voyager 9.1.1 Upgrade Information:
  - <http://www.carli.illinois.edu/products-services/i-share/execute/upgrade>
- e-mail: [support@carli.illinois.edu](mailto:support@carli.illinois.edu)
- phone: (217) 244-7593
- toll free phone: (866) 904-5843

