

Circulation Checklist: System Administration Configuration

Preface

This document provides an overview of the material covered by the I-Share Voyager System Administration workshop—specific to Circulation. Please review this material and use it as a checklist to ensure that your library’s database will be “ready” for circulation. See the document *Voyager System Administration in I-Share Libraries: Part 3: Circulation and Universal Borrowing* for screen shots of the configuration screens cited within this checklist.

Highpoints:

- Circulation Security**
- Expand Names**
- Print Locations**
- Circulation:**
 - Calendars**
 - Miscellaneous**
 - Policy Definitions**

Circulation Security

Top priority is to create your staff Operators and their privileges as soon as possible **after you accept the production circ load.**

- Screens to configure for circ security:
 - SysAdmin > Security > Operator Profiles
 - SysAdmin > Security > Master Profiles
 - SysAdmin > Security > Circulation Profiles

Expand Names

Once the patron data are loaded, circulation profiling and configuration can commence. The bib and patron loads create the short codes for patron groups, locations, and item types. Voyager also comes with some pre-configured fine/fee reasons, to which you can add other codes if needed locally. You should expand the names in System Administration for both client and OPAC display readability. Use intuitive naming conventions that make sense for your library. This can be done at any time after the production patron load, **prior to going “live” in Voyager circulation.**

- Screens to configure for patron group names:
 - SysAdmin > Circulation > Patron Groups icon
- Screens to configure for location names:
 - SysAdmin > System > Locations icon
- Screens to configure for item type names:
 - SysAdmin > System > Item Types icon
- Screens to configure for locally defined fine/fee reason names:
 - SysAdmin > System > Fines/Fees icon

Print Locations

Prior to your circulation transaction load, create the four recommended Print locations. Print locations are not a “physical” concept, but can be thought of as data folder or receptacles to which notices and reports are deposited and accessed by the clients for printing receipts and notices, for example. Print locations must exist before you can complete the configuration of a circ “happening” location(s), which must be done before the circulation transaction load.

- Screens to configure for Print locations
[SysAdmin > System > Print Locations icon](#)

Circulation: Calendars

Each Library needs at least ONE calendar configured prior to your circulation transaction load. There are several options for establishing calendars [from simple to more complex], but you still need a calendar to cover the oldest charges from your former system. Without the historical coverage, these items will not be able to be discharged for further circulation.

- Screens to configure for calendars
[SysAdmin > Circulation > Calendars icon](#)

Circulation: Miscellaneous

Verify that options are configured according to your local practices. These settings should be configured prior to going “live” in Voyager circulation.

- Screen to configure for Circ: Miscellaneous
[SysAdmin > Circulation > Miscellaneous icon](#)

Circulation: Policy Definitions

Libraries must define their own circulation policy groups within the Policy Definitions category. A policy group is a group of locations that share certain, circulation-related characteristics – e.g., policies, items and locations. You can have as many policy groups for each independent operating group as you need, but the simpler the better.

If the same circulation privileges and policies apply to all patron groups for all item types and all of the circ desks have the same hours, you’ll only need one circulation policy group.

Items, Patron Groups, Locations, etc.: Areas in the Circulation Policy Definitions that must be configured include the tabs for:

- **Locations**
- **Policies**
- **Calendar**
- **Patrons**
- **Items**

Locations

You must have at least one “Happening” Location for each policy group. Configure that location prior to your circulation transaction load. Add/expand other locations [shelving, Happening] as needed. Happening locations are where “work” gets done (charge/discharge, etc.) Happening locations work in conjunction with print locations for the printing of circulation slips, notices and reports.

- Screens to configure for Locations
[SysAdmin > Circulation > Policy Definitions > Locations tab](#)

Policies

These settings should be configured according to your local policies and **prior to going “live” in Voyager circulation.**

- Screen to configure for Policies
[SysAdmin > Circulation > Policy Definitions > Policies tab](#)

Calendar

Within the Policy Definitions, the Calendar tab is used to select the active calendar(s) for each particular policy group. Have at least one calendar selected **prior to your circulation transaction load**, whose Start Date is at least as far back as the earliest charge date in your converted data.

- Screens to configure for Calendar

[SysAdmin > Circulation > Policy Definitions > Calendar tab](#)

Patrons

Within the Policy Definitions, the Patrons tab is used to configure the rules and policies for each of your local patron groups and your UB patron groups. At least configure the [all] rules to act as the default **prior to your circulation transaction load**, and then configure the remaining groups when you are able, **prior to going "live" in Voyager circulation**

- Screen to configure for Patrons

[SysAdmin > Circulation > Policy Definitions > Patrons tab](#)

Items

Prior to your circulation transaction load, at least configure the [all] settings for your item type default replacement cost. Configure other item type replacement costs when you are able, **prior to going "live" in Voyager circulation**.

- Screen to configure for Items

[SysAdmin > Circulation > Policy Definitions > Items tab](#)

Matrix

Patron Groups + Item Types + Transaction Values = Circulation Transaction

Patron Group/Item Type combinations within Matrix determine item availability and loan period. Configure at least the [all] values **prior to your circulation transaction load**. The values include: loan period, fine intervals and rates, Lost interval, notice intervals, etc.

Complete the remaining combinations **prior to going "live" in Voyager circulation**.

- Screens to complete for Matrix

[SysAdmin > Circulation > Policy Definitions > Matrix tab](#)