VOYAGER SYSTEM ADMINISTRATION IN I-SHARE LIBRARIES

PART 2: SECURITY



Security System Administration Workspace

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

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NOTE: Screen shots that appear throughout this document come from a variety of I-Share databases. The settings do not always represent the values your library should be using for your policies.

Page references refer to the *Voyager® 9.1.1 System Administration User's Guide.* http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V System Admin 9 1 1.pdf

II. Introduction

This chapter of the I-Share System Administration document is a concise and annotated supplement to the Security portion of the full *Voyager 9.1.1 System Administration User's Guide*. Use this document to learn the I-Share consortial requirements and recommendations for the settings in the Security portion of Voyager System Administration to guide your profiling and configuring in Voyager.

The *Voyager 9.1.1 System Administration User's Guide* contains additional information and explanations; consult Chapter 9, page 9-1 through page 9-125 for further detail. <u>http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_System_Admin_9_1_1.pdf</u>

The sections in this chapter are arranged in the order that they should be edited when a library is first implementing Voyager as an I-Share participant. Some parts of Security SysAdmin build upon each other, so doing the initial data entry work in the order outlined in this document should make this process more efficient for library staff.

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
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III. Security Overview

The different sections of Security are listed below in the order they appear on the screen when SysAdmin> Security is opened. Each section will be described in subsequent sections of this chapter in the order they should be edited by a library first implementing Voyager.

Acquisition/Serials Profiles	Acq/Serials Profiles	This section determines to whom you give various Acquisitions/Serials privileges and for which location(s).
Cataloging Profiles	Cataloging Profiles	This section determines to whom you give various Cataloging privileges and for which location(s).
Circulation Profiles	Circulation Profiles	This section determines to whom you give various Circulation privileges and for which location(s).
e Master Profiles	Master Profiles	This section determines to whom you give various System Administration editing privileges.
الکے Operator Profiles	Operator Profiles	In this section you establish Individuals' names or Generic Account names, e.g., Melvil Dewey, Circ Clerk, circstudent.
Global Data Change Profiles	Global Data Change Profiles	Not in use. This section determines to whom you give various Global Data Change privileges.
Security Options	Security Options	This section allows you to implement password requirements for operators at your library.

New I-Share libraries should start by editing the Security Options in SysAdmin> Security, then next creating the Operator Profiles. Once the Operators are defined, the next step is to create the different Profiles in each functional area (e.g., Cataloging Profiles, Circulation Profiles, and Acquisitions Profiles) that determine the level of privileges within each Voyager client.

An individual Operator can be included in only one profile within each of the four functional areas.

- For example, Melvil Dewey's Operator ID cannot be linked to both a "Copy Cataloging" and "Cataloging Supervisor" Cataloging Profile.
- However, Melvil Dewey's Operator ID can be linked to both a "Cataloging Supervisor" Cataloging Profile and "Circulation Supervisor" Circulation Profile.

It is possible to have staff with profiles in the Master, Acq/Serials, Cataloging, and/or Circulation categories. Any combination of these types is possible for one Operator.

Review pages 9-4 through 9-9 of the *Voyager 9.1.1 System Administration User's Guide* for more information about the common elements found in all Security Profiles.

- \oplus Consortial Rule for setting value(s)
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- \varnothing Does not apply; Or, Do not change this value

The information about creating Master Profiles is found at the end of this chapter because it is different from the rest of SysAdmin Security. Master Profiles determine the permissions for the System Administration module itself. Master Profiles are very powerful and should be carefully assigned.

IV. Security Options

The Security Options section allows you to implement password requirements for operators at your library. A few password minimum requirements are set; these requirements apply to any NEW or CHANGED password.

A. Password Requirements Tab

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File Functions Help	
Acquisitions	urity - Security Ontions
Call Slips	anty security options
Cataloging Pas	sword Uptions
Circulation	Password Requirements Password Requirements 2 Invalid Login Attempts
OPAC Configuration	
Search	New password cannot be same as previous 3 T passwords
Security	Minimum password age: 0 🗧 Days 💌
	Maximum password age (expiration): 0 😫 days
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Circulation Profiles	Aleir usei 0 💽 udys berore password will expire
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	Minimum - at least: 8 🗧 Maximum - at most: 25 🗧 🔽 User's Id 🔽 User's name
Master Profiles	
	Password must contain:
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Operator Profiles	
	At least 0 🗄 alphabetic character(s)
• • • • • • • • • • • • • • • • • • •	At least 0 🕂 uppercase character(s)
Global Data Change Profiles	At least 0 + lowercase character(s)
	At least 0 🕂 number character(s)
	At least 0 🕂 special character/symbol(s)
Security Options	
	Special / symbols: III@##\$% &^??```;;=.;
System	Current Current
Web Services	
Security: Security Options	2:15 PM 🔒

Security- Security Options- Password Requirements Tab

Review pages 9-118 through 9-123 of the *Voyager 9.1.1 System Administration User's Guide* for more information about the Security Options> Password Requirements Tab.

Libraries can determine which password requirements they want to require for their library staff member's operator passwords.

The options are granular in terms of number of alphanumeric, specific case, and special characters; password length; password age; and the ability to contain the operator's name or username.

The only required setting is password length. Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- Ø Does not apply; Or, Do not change this value

B. Password Requirements 2 Tab

🔔 Voyager System A	dministration		82
File Functions He	alp		
Acquisitions	Security - Security Ontions		
Call Slips	Security - Security Options		
Cataloging	Password Options		
Circulation	Password Requirements Password Requirements 2 Invalid Login Attempts		
OPAC Configuration			
Search	Account will be locked after 0 ≑ invalid login attempts		
security	If locked out, the lockout period will be 🛛 🖸 🔄 Days 💌		
1111	Account lockout counter will be reset after 🛛 🚊 Days 🖃		
Lirculation Profiles	Enter text that will be shown on the change password screen:		
e Master Profiles	Your new password must: - be a minimum of 8 and a maximum of 25 characters long - be different from the previous 3 passwords.	*	
0 Operator Profiles			
è.			
Global Data Change Profiles		Ŧ	
Security options			
System Web Services	<u>Save</u>		
Security: Security Option	ns	2:15 PM	<u> //</u>

Security- Security Options- Password Requirements 2 Tab

Review pages 9-123 through 9-124 of the *Voyager 9.1.1 System Administration User's Guide* for more information about the Security Options> Password Requirements 2 Tab.

Library staff members can change their passwords from within the File Menu of each Voyager client.

 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 to update it, or whose password is set to expire to change it before it does expire.

Most I-Share libraries have a balance of generic and user-specific usernames and passwords (operators).

- Voyager does not discriminate between which usernames can have the passwords changed in the clients. It would be possible for a single library staff member to change the password for one of the generic accounts, for example, "Circstudent".
- Should this happen, a Voyager System Administrator with Master Profile- Security (add, edit, delete) privileges retains the ability to update the password from within the SysAdmin client.

On this tab:

- Enter the text shown on the password change screen in the Voyager clients. You can edit the warning to be appropriate for your library; the same warning shows in all Voyager clients.
- Choose whether an operator will be blocked (and for how long) following incorrect/invalid login attempts. Zero (0) invalid login attempts means that the username will not be blocked.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

C. Invalid Login Attempts Tab

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File Functions Help		
Acquisitions Security - Security Ontions		
Call Slips Devend Science		
Cataloging Password Uptions		
Urculation Password Requirements Password Requirements 2 Invalid Login Attempts		
Search Record invalid login attempts		
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Circulation Profiles		
Master Profiles		
120g		
Operator Profiles		
Global Data Change		
Profiles		
Security options		
System		
Web Services Save Cancel		
Security: Security Options	2:18 Pi	vi //

Security- Security Options- Blank Logs, Invalid Login Attempts Tab

Review pages 9-124 through 9-125 of the *Voyager 9.1.1 System Administration User's Guide* for more information about the Security Options> Invalid Login Attempts Tab.

The Invalid Login Attempts Tab records invalid login attempts (incorrect username or password).

The "Record invalid login attempts" checkbox is checked by default. Uncheck the checkbox if you do not wish to log this information.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value

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Call Slips Sec	unity -	security Opt	.10115				
Cataloging Pas	sword Optic	ins					
Circulation	Password	Requiremente P	account Requirements	2 Invalid Log	in Attempte		
OPAC Configuration			assword riequirements		In Attempts		
Search	Record i	nvalid login attempts					
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	Ben	Eranklin Ben	2016-01-27 14:27:32	0		64.107.105.250	
Circulation Profiles	oire	Student Circ	2016-01-27 08:11:13	0		64.107.105.250	
	demen	Student, Circ	2016-01-23 15:31:24	0		216 125 123 149	
	Circdesk		2016-01-22 10:09-01	0		£4 107 105 250	
Master Profiles	Ben	Franklin Ben	2016-01-22 10:03:01	0		64 107 105 250	
indictor i romos	mdeweu	Dewey Melvil	2016-01-21 15:13:29	0		64 107 105 250	
	circstud	Student Circulation	2016-01-19 08:04:48	0		64 107 105 250	
199	circstud	Student, Circulation	2016-01-19 08:04:43	0		64 107 105 250	
Operator Profiles	circstud	Student, Circulation	2016-01-19 08:04:38	0		64 107 105 250	
	mdeweu	Dewey Melvil	2016-01-14 16:15:32	0		64 107 105 250	
- 🕰 👘	Circdesk	Dorrey, Moloi	2016-01-14 08:48:54	0		64 107 105 250	
	Circdesk		2016-01-14 08:48:38	0		64 107 105 250	
Iobal Data Change Profiles	Circdesk		2016-01-14 08:48:29	0		64 107 105 250	
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	Ben	Franklin, Ben	2016-01-12 09:02:40	0		64.107.105.250	-
							-
Security Options	•						
	Export	Clear	Befresh				
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System							_
Web Services			Save	Cancel			

Security- Security Options- Example logs, Invalid Login Attempts Tab

A few comments about the logs:

- The logs can be useful when library staff report login issues.
 - If the Operator Name column is blank, it means the entered UserID did not match an existing Operator, so the entered username was incorrect.
 - If the Operator Name column contains a name, it could either mean that the library staff member entered the incorrect password, or their account was already locked from previous login errors. Check the Lockout Counter column for the latter.
- The data from the log can be exported to Excel for local evaluation, if desired.
- You can clear the log as desired using the "Clear" button.
- You may occasionally see CARLI Staff usernames in the list ©

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V. Operator Profiles

Libraries performing their initial SysAdmin work for Security should next create *Operator Profiles* (i.e., accounts, or aka usernames/passwords) for all appropriate staff in the library.

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Circulation	Administrator, System	SYSADMIN	<u> </u>	<u>4</u> 600
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Search	CARLI, Debbie	debbiei		
Security	Cataloger, Copy	сору	D	
	Clerk, Acquisitions	Ack	+ <u> </u>	
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Acquisition/Serials				
Profiles				
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Master Profiles				
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Operator Profiles				
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System				
Web Services				
Security: Operator Prof	iles		1	2:22 PM

① Libraries should create as many Operator accounts as needed to support local operations.

Security- Operator Profile Workspace

When you click the *Operator Profiles* icon, the display includes both the full name and the login ID (username) for the accounts created previously.

Review pages 9-15 through 9-23 of the *Voyager 9.1.1 System Administration User's Guide* for more information about Operator Profiles.

- \oplus Consortial Rule for setting value(s)
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Overview

Your library can create a unique operator for each individual staff member, or you can create generic operators used by multiple staff members. You can also combine both approaches.

- I Balance the security needs and the transaction history functions in Voyager with the effort required to maintain the operator accounts.
- I CARLI recommends that functional area profiles with higher levels of privileges be linked to individual operator accounts rather than generic accounts.

Information about Specific Operators in Voyager

Ø When Ex Libris (ExL) creates a new Voyager database, Ex Libris staff add a default operator of "SYSADMIN".

- This operator is intended for use by ExL staff only; most of its values cannot be edited.
- CARLI staff will change the default password associated with the SYSADMIN operator upon the library's formal acceptance of their production bib load.
- Ø Do <u>NOT</u> change the password for the SYSADMIN operator locally.

⊕ When Ex Libris (ExL) creates a new Voyager database, they usually add two operators for the data review process: "test" and "demo."

- • You should delete these two operators once the library in live in production for all modules.
- ExL uses the same Operator ID and password for these accounts for all Voyager customers, and as a result, these Operators are inherently insecure and should be deleted.
- Ø CARLI staff will create operators in each I-Share library's database to be used by CARLI staff only, for troubleshooting purposes.
 - Ø Do <u>NOT</u> edit any operators with a last name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or deleting any profiles to which these operators are linked.

- \oplus Consortial Rule for setting value(s)
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- \varnothing Does not apply; Or, Do not change this value

Adding/Editing an Operator

🐊 Voyager System A	dministration		
File Functions He	elp		
Acquisitions	Security - Oper	rator Profiles	
Call Slips	Security oper		
Cataloging	Name	ID .	New
Circulation	Administrator, System	SYSADMIN	
UPAC Configuration	CARLI, Cathy	cathyi	<u>E</u> dit
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Security	Cataloger, Copy	copy	Delete
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Acquisition/Serials	New Operator Profile: -		
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	ID:		
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Circulation Profiles	rasswoiu.		
		Expire password immediately	
		This password never expires	
Master Profiles			
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<u>U</u> 250			
Operator Profiles			
- <u>*</u> 10 - 1		Caused	
System			
Web Services			
Security: Operator Profi	les		12:31 PM 🛛 🔒 🏑

Security- Operator Profiles- New Profile, Operator Tab

In Voyager SysAdmin> Security> Operator Profiles

- To Add a new operator, click [New].
- To Edit an existing operator's record, highlight the name and click [Edit].
- To Delete an operator, highlight the name and click [Delete].

Adding a New Operator:

- 1. On the Operator tab, enter the operator information:
 - Each of these may include alphanumeric characters, punctuation, and spaces.
 - Alphabetic characters are case-sensitive (e.g., mdewey is different from MDewey).
 - First Name (25 characters maximum)
 - Middle Initial, if desired (1 character maximum)
 - Last Name (25 characters maximum)
 - ID (10 characters maximum; this is the username that the operator enters when logging into Voyager)
 - Password (minimum of 8 characters, maximum of 25 characters); other criteria may apply as set in the SysAdmin> Security> Security Options section.
 - Decide whether the checkboxes for *Expire password immediately* or *This password never expires* should be checked.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

- *Expire password immediately* forces the staff member to change their password upon their next login to a Voyager client.
- *This password never expires* prevents an operator's password from expiring even if the criteria for expiration set in the *Security Options* have been met (see page 4 of this document).
- When finished entering a new Operator, click [Save].

Passwords:

- can be changed by the operator in any Voyager client. The File menu in each client has a "Change Password" option.
- should be changed regularly by your library's Sys Admin person for generic accounts.
- is masked and cannot be viewed within SysAdmin.

Reviewing an Operator's Voyager Permissions

After this Operator is linked with the appropriate functional area profiles, the Current Profiles tab will show the various profiles to which this account is linked.

Check the permissions established by the Operator's assigned profiles to determine that operator's privileges in Voyager. **Note:** Any operator entered in SysAdmin may use the Voyager Slip Daemon or Voyager Reporter Client, even if they have no current Profiles Assigned.

A Voyager System Administration				
File Functions Help				
Acquisitions Call Slips Security - Operator I	Profiles			
Circulation ID	*	New		
OPAC Configuration StaffMember, Example example				
Search Super, Media Media		<u>E</u> dit		
Supervisor, Acquisitions Acq				
supervisor, cataloging cat		Delete		
	•			
Edit Operator Profile:				
Profiles Occurrent Desiles				
Uperator Current Frontes	1			
Catalanina Basilas	ID Master			
Acquisitions Supervisor	Aca			
Full Access	Circ			
Cat View Only	Cat			
Circulation Profiles				
Master Profiles				
12a				
Operator Profiles				
System	<u>Save</u>			
Web Services				
Security: Operator Profiles		3:57 PM		
	,			

Security- Operator Profiles- Example operator, Current Profiles Tab

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

VI. Cataloging Profiles

Elibraries should create as many Cataloging Profiles as needed to support local operations.

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OPAC Configuration Search	Cartul Cat Data Review Cat Supervisor/SusAdmin	<u>E</u> dit
Security	Cataloging Assistant Circulation/LL Assistant	<u>D</u> elete
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Profiles		
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Cataloging Profiles		
Circulation Profiles		
Haster Profiles		
ുള്ള Operator Profiles		
System Web Services		
Security: Cataloging Pr	ofiles	10:15 AM 🏼 🔒 🏿

Security- Cataloging Profile- Current Profiles Tab

Overview

The Cataloging Profiles determine the assigned operators' permissions within the Cataloging Client. You should create cataloging profiles based on levels of permissions. Multiple operators can be assigned to the same Cataloging Profile.

Information about Specific Cataloging Profiles in Voyager

- ⊕ When Ex Libris (ExL) creates a new Voyager database, Ex Libris staff may add a Cataloging Profile called "data review" for the data review process.
- • You should delete this Cataloging Profile once the library in live in production for Cataloging.
- Ø CARLI staff will create a Cataloging Profile in each I-Share library's database to be used by CARLI staff only, for troubleshooting purposes.
 - Ø Do <u>NOT</u> edit any settings in the Cataloging Profile with the name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or adding/deleting any operators linked to these profiles.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

Adding/Editing a Cataloging Profile

In Voyager SysAdmin> Security> Cataloging Profiles

- To Add a new Cataloging Profile, click [New].
- To Edit an existing Cataloging Profile, highlight the name and click [Edit].
- To Delete a Cataloging Profile, highlight the name and click [Delete].

When adding a new Cataloging Profile, complete all 5 tabs in the order described below, and then click [Save].

A. Profile Name Tab

🔔 Voyager System A	dministration	
File Functions He	elp	
Acquisitions	Security - Cataloging Profiles	
Call Slips		
Circulation	Names	New
OPAC Configuration	CARLI Col Date Devices	
Search	Lat Data Heview Cat Supervisor/SusAdmin	Edit
Security	Cataloging Assistant	
	Circulation/ILL Assistant	Delete
and a second		_
Acquisition/Serials Profiles		
	Profile <u>Name</u> Uperator <u>Profile Values</u> Profile <u>Values</u> Cont. <u>Locations</u>	
E.c.s.		
Cataloging Profiles	Name:	
<u>11\\</u>		
Circulation Profiles		
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Master Profiles		
a a		
9		
Uperator Profiles		
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System		
Web Services		
Security: Cataloging Pro	ofiles	10:17 AM 🛛 🔒 🏿

Security- Cataloging Profile- New Profile, Profile Name Tab

\oplus Give the new Profile a Name that is indicative of the authorization levels associated with it (examples include: Cat Supervisor, Cat Student, Cat View Only).

- There is a 25 character limit to the profile name.
- If the profile will be limited to specific locations within the library, name the profile to denote the location distinction. For example, if the library has both a Main and Law library, and the cataloging profiles include limitations based on locations, the library may wish to create both a *Cat Main Supervisor* and a *Cat Law Supervisor* profile.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

B. Profiles Values Tab

(A) Voyager System Administration	
File Functions Help	
Acquisitions Security - Cataloging Profiles	
Call Slips Security Cuturoging Fromes	
Cataloging Names	New
Urculation CARLI	
Cat Data Review	<u>E</u> dit
Securitu Cat Supervisor/SysAdmin	
Circulation/III Assistant	Delete
Acquisition/Serials	_
Profiles Profile Name Operator Profile Values Profile Values Cont Continues	
Use Templated Forms	
Cataloging Profiles Bibliographic Record Holding Record	
Add I Lindate Add I Lindate	
T Delete View View	
Circulation Profiles I Report OK I Export OK	
Authority Record	
Master Profiles	
View View View	
IV Export UK	
Operator Reafiles	
Save Cancel	
System	
Web Services	
Security: Cataloging Profiles	10:58 AM 🔒 🏿

Security- Cataloging Profile- New Profile, Profile Values Tab

Review pages 9-54 through 9-67 of the Voyager 9.1.1 System Administration User's Guide for more information about Cataloging Profiles> Profile Values Tab.

Click the corresponding check boxes as appropriate to activate the particular authorized activity for each type of record (bib, MFHD, item, authority). The View option is automatically grayed out (i.e., de-activated) if the profile has Add, Delete, and/or Update checked/enabled.

 \square Cataloging profiles that are intended for staff that will copy ("Add") bib records from the I-Share Universal Catalog should have the *Export OK* option enabled.

- In the I-Share environment, Voyager's Export capability is typically used in association with Bibliographic records, for "backloading" functionality.
- When a bib record is marked as "OK to Export" in the Voyager cataloging client, that bib is later copied from the database and sent to OCLC to set the institution's holding symbol in WorldCat.

- \oplus Consortial Rule for setting value(s)
- ✓ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

C. Profiles Values Cont. Tab

🔔 Voyager System A	dministration	
File Functions He	₂lp	
Acquisitions	Security - Cataloging Profiles	
Call Slips	Security - Cataloging 1 tornes	
Cataloging	Names	New
Circulation	CARLI	<u>Til</u> Cvv
OPAC Configuration	Cat Data Review	Edit
Search	Cat Supervisor/SysAdmin	
Security	Cataloging Assistant	Delete
	Circulation/ILL Assistant	Delete
in a		
Acquisition/Serials	Edit Cataloging Profile:	
Profiles	Profile <u>Name</u> <u>Operator</u> <u>Profile Values</u> Profile <u>Values</u> Cont. <u>Locations</u>	
82.05		
i i i i i i i i i i i i i i i i i i i	Add/Update MARC Tag Table (Authority Format)	
Cataloging Profiles	View MARC Tag Table (Authorithy Format)	
	Add/Update MABC Tag Table (Bibliographic Format)	
<u>11/11</u>	✓ View MARC Tag Table (Bibliographic Format)	
Circulation Profiles	Add/Update MABC Tag Table (Holding Format)	
	View MARC Tag Table (Holding Format)	
•		
Master Profiles	🔲 Global Headings Change	
	Allow Bibliographic Ownership Change	
<u>a</u>	Attach Holdings to any Bibliographic Record	
Operator Profiles		
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Security: Cataloging Pro	ohles	4:13 PM 📋 🎢

Security- Cataloging Profile- New Profile, Profile Values Cont. Tab

Review pages 9-54 through 9-67 of the Voyager 9.1.1 System Administration User's Guide for more information about Cataloging Profiles> Profile Values Cont. Tab.

☑ In Voyager Cataloging, there are MARC Tag Tables (per record type) that are used to validate the structure of the MARC record when it is added to or edited within the database.

- For example, a bib record tag table would indicate that the 245 field (for main title) is mandatory in each record, and that it is not a repeatable field.
- CARLI recommends that only staff with high-level privileges have the option(s) to Add/Update any of the three record formats enabled.

If your library only has one Voyager Owning Library established:

- I recommended do not check "Allow Bibliographic Ownership Change" for appropriate profiles.
- If recommended check "Attach Holdings to any Bibliographic Record" for appropriate profiles.

If your library has more than one Voyager Owning Library established:

- I recommended check "Allow Bibliographic Ownership Change" for appropriate profiles.
- ☑ recommended do not check "Attach Holdings to any Bibliographic Record" for appropriate profiles.

- \oplus Consortial Rule for setting value(s)
- \square CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

☑ CARLI recommends that the "Global Headings Change" option be disabled/unchecked. Most I-Share libraries do not use Global Headings Change. Contact CARLI Support to discuss recommended settings if your library does use Global Heading Change.

D. Locations Tab

🐊 Voyager System A	Administration	
File Functions H	elp	
Acquisitions Call Slips	Security - Cataloging Profiles	
Cataloging	Names	New
Urculation	CARLI	
Search	CARLI Authority Loads	Edit
Security	Cat Lindate	
	Cat View	Delete
everal .		
Acquisition/Serials	Edit Cataloging Profile:	
Profiles	Profile <u>N</u> ame <u>O</u> perator <u>P</u> rofile Values Profile <u>V</u> alues Cont. <u>L</u> ocations	
	Ausilable Leastions	
Cataloging Profiles	Atlas Stand Music Stacks	
	Ready Reference Music Stacks - Mini Score	
105	>>> New Books	
Circulation Profiles		
	Periodical Stacks	
•	Reference	
Master Profiles	Reserves	
	Video Stacks	
0.20		
Operator Profiles		
System	<u>Save</u> <u>Cancel</u>	
Web Services		
Security: Cataloging Pro	ofiles	12:48 PM 🔒 🏿

Security- Cataloging Profile- New Profile, Locations Tab

Review pages 9-9 through 9-11 of the *Voyager 9.1.1 System Administration User's Guide* for more information about location limits.

The values entered on this tab determine which holding and HAPPENING locations are valid for the profile.

- The Available Locations box contains the locations that are not selected for this Cataloging Profile. Operators assigned to this Cataloging Profile are restricted from working with MFHDS/items in these locations.
- The Selected Locations box contains locations that have been selected for this Cataloging Profile. Operators assigned to this Cataloging Profile are able to work with MFHDS/items in these locations.

Use the arrow buttons to move the locations between the Available and Selected boxes. Individual locations can be selected for use in more than one Cataloging profile.

 \blacksquare Libraries that have no need to restrict cataloging activities based on holding locations should select all locations for that profile.

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

E. Operator Tab

A Voyager System Administration		
File Functions Help		
Acquisitions Security - Cataloging Profiles		
Call Slips Security Catalogning Fromes		
Cataloging Names	A	New
Circulation Bulk Import	<u> </u>	<u> </u>
	=	<u>E</u> dit
Security CARLI Authority Loads		
Lat All	[Delete
	· -	
Acquisition/Serials		
Profiles Profile Name Depretor Profile Values Profile Values Cont Locations		
	1	
Available Operators		
Cataloging Profiles Circ Student Ben Franklin		
Circulation Student > Meluil Dewey		
Interlibrary Student		
Circulation Profiles Student		
System Administration		
Master Profiles		
18m		
Operator Profiles		
Save Cancel		
System		
Web Services		
Security: Cataloging Profiles	1:25 PM	1 🔒 //

Security- Cataloging Profile- Example Profile, Operator Tab

This is where individual Operators are linked to their appropriate Cataloging profile. Use the arrow buttons to move the operators between the Available and Selected boxes.

An individual Operator can only be associated with one Cataloging profile.

- In other words, the list of Available Operators includes accounts that have <u>not</u> been selected for any other Cataloging Profile.
- If you do not see the operator you are looking for in the Available list, look at the operator's current profile tab in their SysAdmin> Security> Operator Profile to see which profile they currently belong to. Deselect them from that profile, to make them available for the new profile.

It is NOT necessary to assign every operator to a cataloging profile, depending on your library's workflow.

• For example, it is common for Circulation Student operators to not be linked to any cataloging profiles in SysAdmin Security, which means this operator will always remain in the *Available Operators* box.

F. After all tabs have been populated for this profile, click Save.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

VII. Circulation Profiles

실 Voyager System A	dministration	
File Functions H	elp	
Acquisitions	Security - Circulation Profiles	
Call Slips		
Circulation	Names	New
OPAC Configuration	CARLI Circ Student	Eda
Search	Circ/Reserves	
Security	Full Access	Delete
Acquisition/Serials		
Profiles		
E.e.		
Cataloging Profiles		
Circulation Profiles		
•		
Master Profiles		
<u>1</u> 20		
Operator Profiles		
è		
System		
Web Services		
Security: Circulation Pro	ofiles	1:59 PM 🔒 🏾

① Libraries should create as many Circulation Profiles as needed to support local operations.

Security- Circulation Profile- Current Profiles Tab

Overview

The Circulation Profiles determine the assigned operators' permissions within the Circulation Client. You should create circulation profiles based on levels of permissions. Multiple operators can be assigned to the same Circulation Profile.

Information about Specific Cataloging Profiles in Voyager

☑ When Ex Libris (ExL) creates a new Voyager database, Ex Libris staff may add two Circulation Profiles called "Full Access" and "Restricted."

• ☑ You can either edit these profiles to meet your library's needs, or delete them and create new Circulation Profiles that better suit your library's policies.

Ø CARLI staff will create a Circulation Profile in each I-Share library's database to be used by CARLI staff only, for troubleshooting purposes.

 Ø Do <u>NOT</u> edit any settings in the Circulation Profile with the name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or adding/deleting any operators linked to these profiles.

- \oplus Consortial Rule for setting value(s)
- ✓ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

Adding/Editing a Circulation Profile

In Voyager SysAdmin> Security> Circulation Profiles

- To Add a new Circulation Profile, click [New].
- To Edit an existing Circulation Profile, highlight the name and click [Edit].
- To Delete a Circulation Profile, highlight the name and click [Delete].

When adding a new Circulation Profile, complete all 8 tabs in the order described below, and then click [Save].

A. Profile Name Tab

🐊 Voyager System A	dministration	. . X
File Functions He	elp	
Acquisitions	Security - Circulation Profiles	
Call Slips		
Circulation	Names	New
OPAC Configuration	CARLI Ciri Chudean	
Search	Circ/Beserves	Edit
Security	Full Access	
		Delete
and a second		
Acquisition/Serials Profiles	New Circulation Profile:	
	Profile Name Uperator Locations Profile] Profile 2 Item Blocks Patron Blocks	P <u>a</u> tro.
E.		
Cataloging Profiles	Name:	
11/1		
Circulation Profiles		
•		
Master Profiles		
1 20		
Operator Profiles		
	Save Cancel	
System		
Web Services		
Security: Circulation Pro	, ofiles 2:	10 PM 🔒 🎾

Security- Circulation Profile- New Profile, Profile Name Tab

\oplus Give the new Profile a Name that is indicative of the authorization levels associated with it (examples include: Circ Supervisor, Circ Student, Reserve Clerk).

- There is a 25 character limit to the profile name.
- If the profile will be limited to specific locations within the library, name the profile to denote the location distinction. For example, if the library has both a Main and Branch library, and the circulation profiles include limitations based on locations, the library may wish to create both a *Circ Main Supervisor* and a *Circ Branch Supervisor* profile.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

B. Locations Tab

🔔 Voyager System A	dministration		8
File Functions He	łp		
Acquisitions	Security - Circulation Profiles		
Call Slips	Stearny Chedianon Promes		
Cataloging	Names	New	
Linculation	CARLI		
Secret	Circ Student	<u>E</u> dit	
Securitu		-	_
- Coounty	Full Access	<u>D</u> elete	
		I —	
Acquisition/Serials	Edit Circulation Profile		
Profiles	Incretion Dispersion D	une Ì	
		ups [
E.c.	Available Locations		
Cataloging Profiles	Atlas Stand Archives		
	Ready Reference Book Stacks		
103	CATALOGING	E	
Circulation Profiles	>> Cataloging Department		
Circulation romes	CIRCULATION DESK		
	Error		
Marta Daffer	Faculty Publications		
Master Profiles	Index Stacks		
	International Studies	Ψ	
<u>.</u>	✓ All Locations		
Operator Profiles			
	Saura Conned		
Sustem			
Web Services			
Convitor Circulation Dra	Glas	2.12 DM	A
Security: Lirculation Pro	rites	2:13 FM	

Security- Circulation Profile- Locations Tab

Review pages 9-9 through 9-11 of the *Voyager 9.1.1 System Administration User's Guide* for more information about location limits.

The values entered on this tab determine which circulation locations are valid for the profile.

- The Available Locations box contains the locations that are not selected for this Circulation Profile. Operators assigned to this Circulation Profile are restricted from working with resources from these locations.
- The Selected Locations box contains locations that have been selected for this Circulation Profile. Operators assigned to this Circulation Profile are able to work with resources from these locations.
- The *All Locations* checkbox means that all existing locations, whether selected or not, are to be considered part of this profile. This includes any future locations that might be added.
 - Libraries that have no current or future need to restrict circulation activities based on holding or HAPPENING locations should check the *All Locations* checkbox for that profile.
 - If the *All Locations* box is checked, removing a location from the *Selected Locations* box will have no effect.

Use the arrow buttons to move the locations between the Available and Selected boxes. Individual locations can be selected for use in more than one Circulation profile.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

C. Profile 1 Tab

2 Voyager System Administration				
File Functions Help				
Acquisitions	Security - Circulation Profiles			
Call Slips				
Circulation	Names	1	New	
OPAC Configuration	CARLI			
Search	Circ Student		Edit	
Security	Full Access			
			elete	
and a	,			
Acquisition/Serials	Edit Circulation Profile:	· · · · · · · · · · · · · · · · · · ·		
Fronies	Pro <u>f</u> ile Name <u>Op</u> erator <u>L</u> ocations Profile <u>1</u>	Profile <u>2</u> <u>I</u> tem Blocks Patron <u>B</u> locks P <u>a</u>	tro	
2000	Charge/Renew	Add Fines/Fees		
Cataloging Profiles	✓ Discharge	Modify Outstanding Fines/Fees		
100	Add/Update Recall/Hold Requests	Forgive/Error/Refund Fines/Fees		
Circulation Profiles	Resequence Recall/Hold Request Queues	Accept Payments		
	🔽 Change Due Date	Lost item return: refund overdue		
•	Backdate Due Date/Time at Discharge	✓ Lost item return: refund replacement fee		
Master Profiles	Mask Patron Social Security Number	Lost item return: refund processing fee		
<u>1</u> 29		Lost item return: decrement patron lost counter		
Operator Profiles				
System	Save	Cancel		
Web Services				
Security: Circulation Pro	ofiles	2:36 PM	<u> </u>	

Security- Circulation Profile- Profile 1 Tab

Review pages 9-73 through 9-85 of the Voyager 9.1.1 System Administration User's Guide for more information about Circulation Profiles> Profile 1 and Profile 2 Tabs.

Click each check box as appropriate to enable that particular authorized activity.

 \oplus All circulation profiles must have the *Mask Patron Social Security Number* option checked/enabled, for patron privacy purposes. There is a consortial policy prohibiting storing SSNs in patron records. Enabling masking of the SSN is an extra level of security to prevent unauthorized use of the SSN field in patron records.

There are no other required default Circulation Operator settings, although it makes sense that each profile (other than View-only profiles) have the "Charge/Renew" option enabled.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

D. Profile 2 Tab

A Voyager System Administration			
File Functions Help			
Acquisitions Security -	Circulation Profiles		
Call Slips	Circulation i formes		
Cataloging Names			New
DRAC Configuration CARLI			
Search Circ Student			<u>E</u> dit
Security Full Access			
			<u>D</u> elete
Acquisition/Serials	Profile:		
Profile Nam	e] <u>O</u> perator] <u>L</u> ocations] Profile	1 Profile <u>2</u> <u>I</u> tem Blocks Patron <u>B</u> loc	cks Patro
	ladata Datasa Dagarda	R Deserve Course Deserve	
Add/L	Jpdate Patron Necords	I♥ Frocess Course Reserve	
	Jpdate PINs	View Patron Info in Item Circulation	History
🗖 View-0	Only Patron Records	Add/Update Item Records	
Circulation Profiles	e Patron Records	🔲 Set/Change Item Status	
Add/L	Jpdate Proxy Patron	🗌 Attach Holdings To Any Bibliograph	ic Record
🗧 🛛 🔽 Reset	Patron Record Counters	🔲 Update Holding Record With Pick A	And Scan
Master Profiles 🔽 Edit S	tub Patrons	Delete Item Records	
🚛 🔽 Manua	ally Map Remote Patrons	Delete Holdings Records	
Operator Profiles Distribute	Item: No Access	🔲 Delete Bibliographic Records	
System	Save	Cancel	
Web Services			
Security: Circulation Profiles			2:35 PM 🔒 🎵

Security- Circulation Profile- Profile 2 Tab

Review pages 9-73 through 9-85 of the Voyager 9.1.1 System Administration User's Guide for more information about Circulation Profiles> Profile 1 and Profile 2 Tabs.

Click each check box as appropriate to enable that particular authorized activity.

⊕ All circulation profiles must have the *View Patron Info in Item Circulation History* option unchecked/disabled, for patron privacy purposes. There is a consortial policy prohibiting the retention of the patron's Circulation History. Disabling the ability to view the patron's Circulation History is an extra level of security.

There are no other required default Circulation Operator settings on the Profile 2 tab.

If library staff will be able to use Pick and Scan in the Voyager Circulation client, it may make sense to check (enable) these settings:

- Add/Update Item Records
- Update Holdings Record With Pick And Scan
- Delete Item Records
- Delete Holdings Records
- Delete Bibliographic Records

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

E. Item Blocks Tab

A Voyager System Administration			
File Functions Help			
Acquisitions Security - Circulation Profiles			
Call Slips			
Cataloging Names			New
Circulation			<u></u>
Circ Student			Edit
Security Circ/Reserves			
Full Access			Delete
Acquisition / Serials			
Profiles Profile Name Departor Locations Pro	ofile 1 D Profile	a 2] Item Blocks] Patron Blocks]	Patro
Available Item Blocks		Operator May Override	
Cataloging Profiles All items for title are lost or missing		End-of-term date not found for TERM	
There are no items for this title	. 1	loan.	=
105	>	Item does not circulate.	
Circulation Profiles	>>	Item has a loan period or U.	
		Applied	
	۲.	Item has an item status of Lost - System	
Master Profiles		Item has an item status of Missing	
		Item has been withdrawn.	
0 2 -		Item has call slip request for another	
Operator Profiles		patron.	-
Sav Sav	e <u>C</u>	ancel	
System			
Web Services			
Security: Circulation Profiles		2:34 F	м 🔒 //

Security- Circulation Profile- Item Blocks Tab

Review pages 9-85 through 9-89 of the Voyager 9.1.1 System Administration User's Guide for more information about Circulation Profiles> Item Blocks Tab.

The Item Blocks tab specifies which item-related blocks an operator linked to the profile is able to override during a circulation transaction.

Use the arrow buttons to move the item blocks between the *Available Item Blocks* and *Operator May Override* boxes.

Individual item blocks can be enabled for override in more than one Circulation profile.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

F. Patron Blocks Tab

Avoyager System Administration				
File Functions Help				
Acquisitions Security - (Tirculation Profile	e		
Call Slips Security - C		3		
Cataloging				New
Circulation				<u></u> cvv
OPAC Configuration Circ Student				Edit
Search Circ/Reserves				
Full Access				Delete
and a second				
Acquisition/Serials Edit Circulation P	rofile:			
Profile Name	<u>Operator</u> <u>L</u> ocations	Profile 1 Profile ;	2 <u>I</u> tem Blocks Patron <u>B</u> locks	Patro
		_		
Available f	Patron Blocks		Operator May Override	
Cataloging Profiles Charged It	tems Limit (includes hold		Call slip limit	
Charged It	ems Limit for Item's Item Type	>	Charged items limit Charged Items Limit for Item's Item	=
(includes h	nold requests)		Type	
Circulation Profiles Charged It	tems Limit for Item's Policy Group hold requests)	<u> </u>	Charged Items Limit for Item's Policy	
Charged It	ems Limit for Policy Group for		Charged Items Limit for Policy Group I	for
ltem's Item	Type (includes hold requests)	<	Item's Item Type	·
Master Profiles Hold reque	est limit	~~	Claims returned items limit	
UB maximi	um demerits limit		Lost items limit	
11B reques	r group must be manually mapped st items limit	1	Maximum demerits limit	_
Operator Profiles		_	j maximum rines limit	
🕰 🖸	<u>S</u>	ave <u>C</u> ar	ncel	
System				
Web Services				
Security: Circulation Profiles			2:3	3 PM 🔒 🌆

Security- Circulation Profile- Patron Blocks Tab

Review pages 9-89 through 9-92 of the Voyager 9.1.1 System Administration User's Guide for more information about Circulation Profiles> Patron Blocks Tab.

The Patron Blocks tab specifies which patron-related blocks an operator linked to the profile is able to override during a circulation transaction.

Use the arrow buttons to move the patron blocks between the *Available Patron Blocks* and *Operator May Override* boxes.

Individual patron blocks can be enabled for override in more than one Circulation profile.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

G. Patron Groups Tab

🐊 Voyager System A	dministration
File Functions He	elp
Acquisitions	Security - Circulation Profiles
Call Slips	Security Chediation Fromes
Cataloging	Names
Circulation	CARLI
UPAC Configuration	Circ Student Edit
Search	Circ/Reserves
security	Full Access
BARKE	E-B Cardeday De-Car
Acquisition/Serials Profiles	
	<u> Uperator Locations Profile Profile 2 Item Blocks Patron Blocks Patron Groups </u>
Cataloging Profiles	AC EMPLY
Cataloging Fronics	
	FACULTY
	GRAD STDNT
Lirculation Profiles	HIGHSCHOOL
-	
Master Profiles	Destrict Circulation
	Restrict Dirculation Restrict Record View
<u>0</u>	Restrict Record Maintenance
Operator Profiles	
- 📸 🗉	Save
System	
Web Services	
Security: Circulation Pro	ofiles 2:32 PM 🔒 🦯

Security- Circulation Profile- (Restricted) Patron Groups Tab

Review pages 9-92 through 9-94 of the Voyager 9.1.1 System Administration User's Guide for more information about Circulation Profiles> Patron Groups Tab.

The Patron Groups tab allows you three options for restricting library staff interactions with Voyager Patron Records: *Restrict Record Maintenance, Restrict Record View,* and *Restrict Circulation*.

Restrict Record Maintenance prevents the library staff members associated with the Circulation Security Profile from:

- editing the patron records associated with the Restricted Patron Groups.
- viewing the Outstanding Fines on an item, if the fines are associated with a patron from the Restricted Patron Group.

 \oplus Do not check *Restrict Circulation* or *Restrict Record View*. These settings are problematic because they prevent library staff members associated with the Circulation Security Profile from being able to search for a patron record from the Restricted Patron Group.

- Instead of receiving a warning that the patron record is restricted and cannot be viewed, library staff receive the error "Unable to find patron name" followed by "Unable to find patron."
- Example of problem: If you Restrict Record View for the "Problem Patron" patron group, and library staff search for a patron assigned to that patron group, they will not retrieve the patron's record. They will not know the patron is already entered in the system, and may manually add a new record for the patron, thus allowing that Problem Patron borrowing privileges.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

H. Operator Tab

🎍 Voyager System A	dministration
File Functions He	alp
Acquisitions	Security - Circulation Profiles
Call Slips	Security - Chediation i Tomes
Cataloging	Names
Circulation	CARLI
UPAC Configuration	Circ Student
Securitu	Circ/Reserves
Jecuny	Full Access Delete
Acquisition /Seriale	- Edit Circulation Profile:
Profiles	Profile Name] Operator] Locations] Profile 1] Profile 2] Item Plocks] Patron Plocks] Patro *
	Available Operators Selected Operators
Cataloging Profiles	Authority Deletes CARLI Ben Franklin
	Bulk Import Melvil Dewey
11XX	Serials Student
Circulation Profiles	System Administrator
Master Profiles	
master Fronies	
1 the	
Operator Profiles	
operator Profiles	
è 🖓 🗖	Save Cancel
System	
Web Services	
Security: Circulation Pro	, vfiles 2:25 PM 🔒

Security- Circulation Profile- Operator Tab

This is where individual Operators are linked to their appropriate Circulation profile. Use the arrow buttons to move the operators between the Available and Selected boxes.

An individual Operator can only be associated with one Circulation profile.

- In other words, the list of Available Operators includes accounts that have <u>not</u> been selected for any other Circulation Profile.
- If you do not see the operator you are looking for in the Available list, look at the operator's current profile tab in their SysAdmin> Security> Operator Profile to see which profile they currently belong to. Deselect them from that profile, to make them available for the new profile.

It is NOT necessary to assign every operator to a circulation profile, depending on your library's workflow.

 For example, it is common for Acquisitions Student operators to not be linked to any circulation profiles in SysAdmin Security, which means this operator will always remain in the "Available Operators" box.

I. After all tabs have been populated for this profile, click Save.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- Ø Does not apply; Or, Do not change this value

VIII. Acquisition/Serials Profiles

 \oplus Libraries should create as many Acquisition Profiles as needed to support local operations.

File Functions Help	
Acquisitions Security - Acquisition/Serials Profiles	
Call Slips	
Circulation Names	New
OPAC Configuration	
Search ACQ SysAdmin	
Security CARLI	Delete
Profiles	
Cataloging Profiles	
Circulation Profiles	
Master Profiles	
12 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
Operator Profiles	
Veb Services	
Security: Acquisition/Serials Profiles 10):43 AM 🔒 🏑

Security- Acquisitions Profile- Current Profiles Tab

Overview

The Acquisitions Profiles determine the assigned operators' permissions within the Acquisitions Client. You should create acquisitions profiles based on levels of permissions. Multiple operators can be assigned to the same Acquisitions Profile.

Information for New I-Share Libraries

- For a new I-Share library's Voyager implementation, the library can begin to use Acquisitions/Serials as soon after the formal acceptance of the production bib load as desired.
- However, many I-Share libraries wait to begin using Acq/Ser until after the beginning of a new fiscal period, which for many libraries is after they are live on Voyager for Circulation.
- In addition, some I-Share libraries never choose to use Voyager Acq/Serials, as it is considered an optional Voyager component.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

Information about Specific Acquisitions Profiles in Voyager

- Ø Because none of the new I-Share libraries in recent years have elected to convert any types of
- Acquisitions data to Voyager, there are no Acquisition/Serials profiles created by default by Ex Libris. Ø CARLI staff will create an Acquisitions Profile in each I-Share library's database to be used by CARLI
- staff only, for troubleshooting purposes.
 - Ø Do <u>NOT</u> edit any settings in the Acquisitions Profile with the name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or deleting any operators linked to these profiles.

Adding/Editing an Acquisitions Profile

In Voyager SysAdmin> Security> Acquisitions Profiles

- To Add a new Acquisitions Profile, click [New].
- To Edit an existing Acquisitions Profile, highlight the name and click [Edit].
- To Delete an Acquisitions Profile, highlight the name and click [Delete].

When adding a new Acquisitions Profile, complete all 5 tabs in the order described below, and then click [Save].

A Voyager System Administration		
File Functions Help		
Acquisitions Security	- Acquisition/Serials Profiles	
Call Slips	- Acquisition benais 1 tomes	
Cataloging Names		New
Circulation ACQ Assista	nt	<u></u>
UPAC Configuration ACQ Superv	isor	<u>E</u> dit
Search ACQ SysAdr	nin	
CARLI		Delete
NOTE:		
Acquisition/Serials New Acquis Profiles	sition/Serials Profile:	
Profile 1	<u>√</u> ame <u>O</u> perator <u>P</u> rofile Values Profile <u>V</u> alues Cont. <u>L</u> ocations	
	Name:	
Lataloging Profiles	,	
Circulation Profiles		
•		
Master Profiles		
<u>a</u>		
Operator Profiles		
🗛 🖬	<u>Save</u>	
System		
Web Services		
Security: Acquisition/Serials Profiles		10:45 AM 🔒 🏿

A. Profile Name Tab

Security- Acquisitions Profile- New Profile, Profile Name Tab

- Onsortial Rule for setting value(s)
 Onsortial Rule
 Onsortial Rul
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

\oplus Give the new Profile a Name that is indicative of the authorization levels associated with it (examples include: Acq Supervisor, Acq Student, Serials Student).

- There is a 25 character limit to the profile name.
- If the profile will be limited to specific locations within the library, name the profile to denote the location distinction. For example, if the library has both a Main and Branch library, and the acquisitions profiles include limitations based on locations, the library may wish to create both a *Acq Main Supervisor* and a *Acq Branch Supervisor* profile.

B. Profile Values Tab

🐊 Voyager System A	dministration		
File Functions Help			
Acquisitions Call Slips	Security - Acquisition/Serials Profiles		
Cataloging	Names	New	
OPAC Configuration	ACQ Assistant		
Search	ACQ Supervisor	Edit	
Security	CABLI		
		Delete	
EV278			
Acquisition/Serials	New Acquisition/Serials Profile:		
Profiles	Profile <u>N</u> ame <u>O</u> perator <u>P</u> rofile Values Profile <u>V</u> alues Cont.	Locations	
in the second	I Add/Update Purchase Orders	ld/Update Vendor	
Cataloging Profiles	✓ Delete Purchase Orders	elete Vendors	
	🔲 🗖 View-Only Purchase Orders 🛛 View-Only Item 🗖 Vie	ew-Only Vendors	
11 \\	Approve Purchase Orders		
Circulation Profiles	Process Claims from Acquisition	ons	
	ViewOnly Serials Check-In ViewOnly Process Claims from Serials Co	ontrol	
•		IS LISUS	
Master Profiles	✓ Add/Update Serial Patterns		
020	Delete Serial Patterns 🔽 Attach Holding to any Biblogra	aphic Record	
Operator Profiles			
System	Save		
Web Services			
Security: Acquisition/Se	arials Profiles	10:50 AM 🔒	11.

Security- Acquisitions Profile- New Profile, Profile Values Tab

Review pages 9-40 through 9-48 of the Voyager 9.1.1 System Administration User's Guide for more information about Acquisitions Profiles> Profile Values and Profile Values Cont. Tabs.

Click each check box as appropriate to enable that particular authorized activity.

When a new profile is being created, by default the View-Only options are always automatically grayed out (i.e., de-activated) if the profile has Add, Delete, and/or Update checked/enabled for each corresponding type of record. If Add, Delete, and/or Update is not checked/enabled for a record type, the View-Only option will remain greyed out, but will be considered activated.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

C. Profile Values Cont. Tab

🔔 Voyager System A	dministration		
File Functions Help			
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Circulation	ACQ Assistant		<u></u>
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Search	ACQ SysAdmin		
security	CARLI		Delete
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Acquisition/Serials Profiles	New Acquisition/Serials Profile:		
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	Add Lindate Lodger and Funde	Add/Update Invoices	
Cataloging Profiles	View-Only Ledgers and Funds	View-Only Invoices	
Cataloging Fronies	Delete Ledgers and Funds	Delete Invoices	
	Change Fund Allocations	Approve Invoices	
Circulation Profiles	Fiscal Close Operations	Bindery-View Volume And Issue	
	Currency Maintenance	I Bindery-Edit Volume Level Data	
•		Bindery-Edit issue sequence for volumes	
Master Profiles	EDI Incoming	i ondery fink	
	EDI Outgoing	Override Overexpend Warning	
۵۵	Modify EDI Outgoing Messages	Override Overcommit Warning	
Operator Profiles			
	Caus	Cancel	
🖌 🖓 🗖	<u>Dave</u>		
System			
Web Services			
Security: Acquisition/Se	erials Profiles		10:57 AM 🔒 加

Security- Acquisitions Profile- New Profile, Profile Values Cont. Tab

Review pages 9-40 through 9-48 of the Voyager 9.1.1 System Administration User's Guide for more information about Acquisitions Profiles> Profile Values and Profile Values Cont. Tabs.

Click each check box as appropriate to enable that particular authorized activity.

Note that the View-Only options are automatically grayed out (i.e., de-activated) if the profile has Add, Delete, and/or Update checked/enabled for each corresponding type of record.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

D. Locations Tab

🐊 Voyager System A	Administration			
File Functions Help				
Acquisitions	Security - Acquisition/Serials Profiles			
Call Slips	Security Trequisition Security Troumes			
Circulation	Names	New		
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-		-		
Acquisition/Serials	New Acquisition/Serials Profile:			
Profiles	Profile <u>N</u> ame <u>Operator</u> <u>Profile Values</u> Profile <u>V</u> alues Cont. <u>Locations</u>			
Cataloging Drofiles	Available Locations Selected Locations			
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	Music stacks - Mini score New Books			
LIN Circulation Profiles	Online			
Circulation Profiles	Oversize Shelves			
	Periodical Stacks Beference			
Master Profiles	<			
Master Fronies	Special Collections			
1 A	Video Stacks			
Operator Profiles				
🛛 🏊 🗉	<u>Save</u> <u>C</u> ancel			
System				
Web Services				
Security: Acquisition/S	erials Profiles	11:07 AM 🔒 🏿		

Security- Acquisitions Profile- New Profile, Locations Tab

Review pages 9-9 through 9-11 of the *Voyager 9.1.1 System Administration User's Guide* for more information about location limits.

The values entered on this tab determine which holding and HAPPENING locations are valid for the profile.

- The Available Locations box contains the locations that are not selected for this Acquisitions Profile. Operators assigned to this Acquisitions Profile are restricted from processing materials in Acquisitions for that location.
- The Selected Locations box contains locations that have been selected for this Acquisitions Profile. Operators assigned to this Acquisitions Profile are able to work with MFHDS/items in these locations.

Use the arrow buttons to move the locations between the Available and Selected boxes. Individual locations can be selected for use in more than one Acquisitions profile.

 \square Libraries that have no need to restrict acquisitions activities based on holding locations should select all locations for that profile.

- \oplus Consortial Rule for setting value(s)
- ✓ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

E. Operator Tab

A Voyager System Administration	
File Functions Help	
Acquisitions Security - Acquisition/Serials Profiles	
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Cataloging Names	New
DPAC Configuration ACQ Assistant	
Search ACQ Supervisor	<u>E</u> dit
Security CARLI	
	Delete
Acquisition/Serials	
Profile Name Departor Profile Values Profile Values Cont. Locations	
Available Operators Selected Operators	
Cataloging Profiles Circulation Student	
Interlibrary Student	
Circulation Profiles	
System Administrator	
٢	
Master Dufiles	
(A.	
Save Cancel	
System	
Web Services	
Security: Acquisition/Serials Profiles	11:05 AM 🔒 🏒

Security- Acquisitions Profile- Operator Tab

This is where individual Operators are linked to their appropriate Acquisitions profile. Use the arrow buttons to move the operators between the Available and Selected boxes.

An individual Operator can only be associated with one Acquisitions profile.

- In other words, the list of Available Operators includes accounts that have <u>not</u> been selected for any other Acquisitions Profile.
- If you do not see the operator you are looking for in the Available list, look at the operator's current profile tab in their SysAdmin> Security> Operator Profile to see which profile they currently belong to. Deselect them from that profile, to make them available for the new profile.

It is NOT necessary to assign every operator to an acquisitions profile, depending on your library's workflow.

- For example, it is common for Circulation Student operators to not be linked to any acquisitions
 profiles in SysAdmin Security, which means this operator will always remain in the "Available
 Operators" box.
- F. After all tabs have been populated for this profile, click Save.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

IX. Master Profiles

 \oplus Libraries should create ONLY as many Master Profiles as needed to support local operations.



Security- Master Profile- Current Profiles Tab

Review pages 9-23 through 9-38 of the *Voyager 9.1.1 System Administration User's Guide* for more information about Master Profiles.

Overview

Master Profiles determine access privileges to the different areas within System Administration itself (e.g., the ability to add/edit Acq/Ser Profiles, Cat Profiles, Circ Profiles, Call Slip queues and rules, System Locations, Security settings, etc...). You should create master profiles based on levels of permissions. Multiple operators can be assigned to the same Master Profile.

Information about Specific Master Profiles in Voyager

Ø When a new Voyager database is created, a default Operator of "SYSADMIN" is created by ExL, and it is always associated with a Master Profile called "System Administrator."

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

• This master profile is intended for use by ExL staff only, and its Operator and Profile values tabs cannot be edited.

Ø CARLI staff will create a Master Profile in each I-Share library's database to be used by CARLI staff only, for troubleshooting purposes.

• Ø Do <u>NOT</u> edit any settings in the Master Profile with the name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or adding/deleting any operators linked to these profiles.

Adding/Editing a Master Profile

In Voyager SysAdmin> Security> Master Profiles

- To Add a new Master Profile, click [New].
- To Edit an existing Master Profile, highlight the name and click [Edit].
- To Delete a Master Profile, highlight the name and click [Delete].

☑ Library staff should create at least one new Master Profile that allows access to all parts of System Administration, and then link the appropriate library operator(s) to this high level master profile.

- The library may also create additional master profiles as needed to allow access to specific parts of System Administration by library staff.
- For example, the library might create a master profile called "Circulation SysAdmin" that would have Profile values enabled for "Circulation Policy Groups" (and perhaps other values), but not "Cataloging Policy Groups". This would allow the operators associated with this profile to edit the library's Circulation Policy Definitions in SysAdmin, but prevent these operators from accessing the Cataloging section of SysAdmin.

When adding a new Master Profile, complete all 4 tabs in the order described below, and then click [Save].

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value

A. Profile Name Tab

🔔 Voyager System A	dministration	
File Functions He	elp	
Acquisitions	Security - Master Profiles	
Call Slips	Security - Master 1 Tornes	
Cataloging	Names	New
Circulation	Acquisitions	
UPAC Contiguration	Calendar Maintenance	Edit
Securitu	CARLI	
Jecuny	SysAdmin Sustan Administrator	Delete
	Jesistem Administrator	
Acquisition /S cripte	– New Master Profile: –	
Profiles	Brofile Name D Operator D Brofile Values D Locations D	
Cataloging Profiles	Name:	
11XX		
Circulation Profiles		
Master Profiles		
indistor Fronics		
<u>1</u> 299		
Operator Profiles		
System	<u>Save</u>	
Web Services		
Security: Master Profile:	\$	11:34 AM 🛛 🔒 🎵

Security- Master Profile- New Profile, Profile Name Tab

⊕ Give the new Profile a Name that is indicative of the authorization levels and SysAdmin modules associated with it (examples include: AllSysAdmin, CircSysAdmin, CatSysAdmin).

- There is a 25 character limit to the profile name.
- If the profile will be limited to specific locations within the library, name the profile to denote the location distinction. For example, if the library has both a Main and Branch library, and the Master profiles include limitations based on locations, the library may wish to create both a *MainCircSysAdmin* and a *BranchCircSysAdmin* profile.
- If the master profile is being created for an individual or staffing level, the name should be indicative of these titles (e.g., *Library Director, Circ Supervisor*).

Click on the Profile Values tab next. We'll come back to the Operator tab later.

- \oplus Consortial Rule for setting value(s)
- ✓ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

B. Profile Values Tab

🐊 Voyager System A	dministration	
File Functions He	٤lp	
Acquisitions	Security - Master Profiles	
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Cataloging	Names	New
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Terrat		
Acquisition/Serials	New Master Profile:	-
Profiles	Profile Name Deprator Profile Values Locations	
	Security (add, edit, delete) Circulation Policy Groups (add, edit, delete) Security (view) Circulation Policy Groups (view)	
Cataloging Profiles		
100	Acq/Serials Policy Groups (add, edit, delete) Acq/Serials Policy Groups (view) Patron Groups (view)	
Circulation Profiles	Cataloging Policy Groups (add, edit, delete)	
	Cataloging Policy Groups (view)	
•	edit, delete)	
Master Profiles	System-Wide and OPAC Configuration (view) 🔲 Media Policy Groups (view, add, edit, delete)	
<u>1</u> 29		
Operator Profiles		
ء 💫	<u>Save</u>	
System		
Web Services		
Security: Master Profiles	8	1:28 PM 📋 🎢

Security- Master Profile- New Profile, Profile Values Tab

Review pages 9-24 through 9-30 of the *Voyager 9.1.1 System Administration User's Guide* for more information about Master Profiles> Profile Values Tab.

When you create a new Master Profile, by default, all options are unchecked/disabled. Check the options that are applicable to the new master profile. Master profiles can be set up to include any combination of these options.

☑ CARLI recommends that a library have a minimum of two Operators with the Master *Profile Value* of *Security (add, edit, delete)* options enabled. However, enabling this value for more than two Operators should be carefully considered.

- The *Security (add, edit, delete)* option is extremely powerful and should not be assigned to many people.
- This authorization allows the operator to create, change, and delete individual Operator accounts in the database. It also has permission to change all Operators' passwords.

- \oplus Consortial Rule for setting value(s)
- ✓ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

If an Operator's login is not associated with any Master Profile (i.e., their account is not authorized to have access to any parts of System Administration), if they attempt to log in to the SysAdmin client, their connection fails.

 No error message is generated in this case; the SysAdmin client just closes automatically after the login and password are entered.

If an Operator's login is associated with a master profile that allows access to some, but not all, parts of System Administration, when they log in to the SysAdmin client, their resulting screen display will only include the parts of SysAdmin to which their master profile grants access.

- For example: The "Media Supervisor" master profile in a generic Voyager training database has the following profile values selected:
 - Circulation Policy Groups
 - Cluster View-Only
 - Edit Patron Groups
 - Media Policy Groups

When an operator linked to this "Media Supervisor" master profile logs into SysAdmin, she sees the following display in her SysAdmin client.



System Administration options for an operator with limited Master Profile permissions.

Note that this display contains many fewer options than the first screen shot in this document, which shows the display for an operator with access to all parts of SysAdmin.

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

C. Locations Tab

🐊 Voyager System A	dministration		
File Functions Help			
Acquisitions	Security - Master Profiles		
Call Slips			
Cataloging	Names	New	
Linculation	Acquisitions		
Search	Calendar Maintenance	<u>E</u> dit	
Security	CARLI Contractor		
	System Administrator	<u>D</u> elete	
Acquisition/Serials	Edit Master Profile:	_	
Profiles	Profile Name Deperator Profile Values Locations		
		1	
E.e.	Available Locations Selected Locations		
Cataloging Profiles	International Studies Acquisitions Department		
	Aldrich Collection		
<u>11///</u>	Altas Stand		
Circulation Profiles	Book Stacks		
	CATALOGING		
•	Cataloging Department		
Master Profiles			
	Error		
120			
Operator Profiles	 	1	
	Save		
- <u>- 1</u>			
System			
Web Services		2.00 PM	
Security: Master Profile:	S	2:09 PM 📋 🦯	

Security- Master Profile- New Profile, Locations Tab

Review pages 9-9 through 9-11 of the *Voyager 9.1.1 System Administration User's Guide* for more information about location limits.

Assigning Locations in the Master Profiles allows an individual location to be included in the list of *Available Locations* in the other parts of SysAdmin.

- An example may be the best way to describe this functionality:
 - The library created a master profile named *Circ-SysAdmin* that on the Profile Values tab only has the *Circulation Policy Groups (add/edit/delete)* option checked/enabled.
 - On the Location Tab, the International Studies location, as pictured above, is not included in the *Selected Locations* box for this master profile.
 - Any operator linked to this profile, who is doing the Circ SysAdmin configuration, will not see the *International Studies* location listed in the *Available Locations* listing for the Circulation Policy Groups settings.
- The Available Locations box contains the locations that are not selected for this Master Profile. Operators assigned to this Master Profile are restricted from seeing this location listed in other sections of Voyager SysAdmin.
- The Selected Locations box contains locations that belong to the Master Profile currently being defined. Operators assigned to this Master Profile are will see these locations listed in other sections of Voyager SysAdmin.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

Use the arrow buttons to move the locations between the Available and Selected boxes. Individual locations can be selected for use in more than one Acquisitions profile.

 \blacksquare Libraries that have no need to restrict access to the individual parts of SysAdmin by location should select all locations for that profile.

D. Operator Tab

실 Voyager System A	Administration	
File Functions H	elp	
Acquisitions Call Slips	Security - Master Profiles	
Cataloging	Names	New
OPAC Configuration	Acquisitions	
Search	CaRLI	<u>E</u> dit
Security	SysAdmin	Delete
Acquisition/Serials Profiles	System Administrator Edit Master Profile: Profile Name Operator Profile Values Locations	Delete
Cataloging Profiles	Available Operators Selected Operators Circ Student Een Franklin Circulation Student Melvil Dewey Serials Student >>	
Master Profiles		
Operator Profiles		
System Web Services	<u>S</u> ave <u>C</u> ancel	
Security: Master Profile	8	2:09 PM 🔒 🏿

Security- Master Profile- New Profile, Operator Tab

This is where individual Operators are linked to their appropriate Master Profile. Use the arrow buttons to move the operators between the Available and Selected boxes.

IMPORTANT NOTE: not all Operators in a database should be included in a Master Profile. Only those staff who should have access to SysAdmin should be associated with a Master profile.

An individual Operator can only be associated with one Master Profile.

- In other words, the list of Available Operators includes accounts that have <u>not</u> been selected for any other Master Profile.
- If you do not see the operator you are looking for in the Available list, look at the operator's current profile tab in their SysAdmin> Security> Operator Profile to see which profile they currently belong to. Deselect them from that profile, to make them available for the new profile.

E. After all tabs have been populated for this profile, click Save.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- \varnothing Does not apply; Or, Do not change this value

X. Global Data Change Profiles



Security- Global Data Change Profile- Current Profiles Tab

CARLI does not currently support Voyager's Global Data Change functionality.

$\ensuremath{\varnothing}$ CARLI recommends that you leave this section blank.

- \oplus Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- $\ensuremath{\varnothing}$ Does not apply; Or, Do not change this value