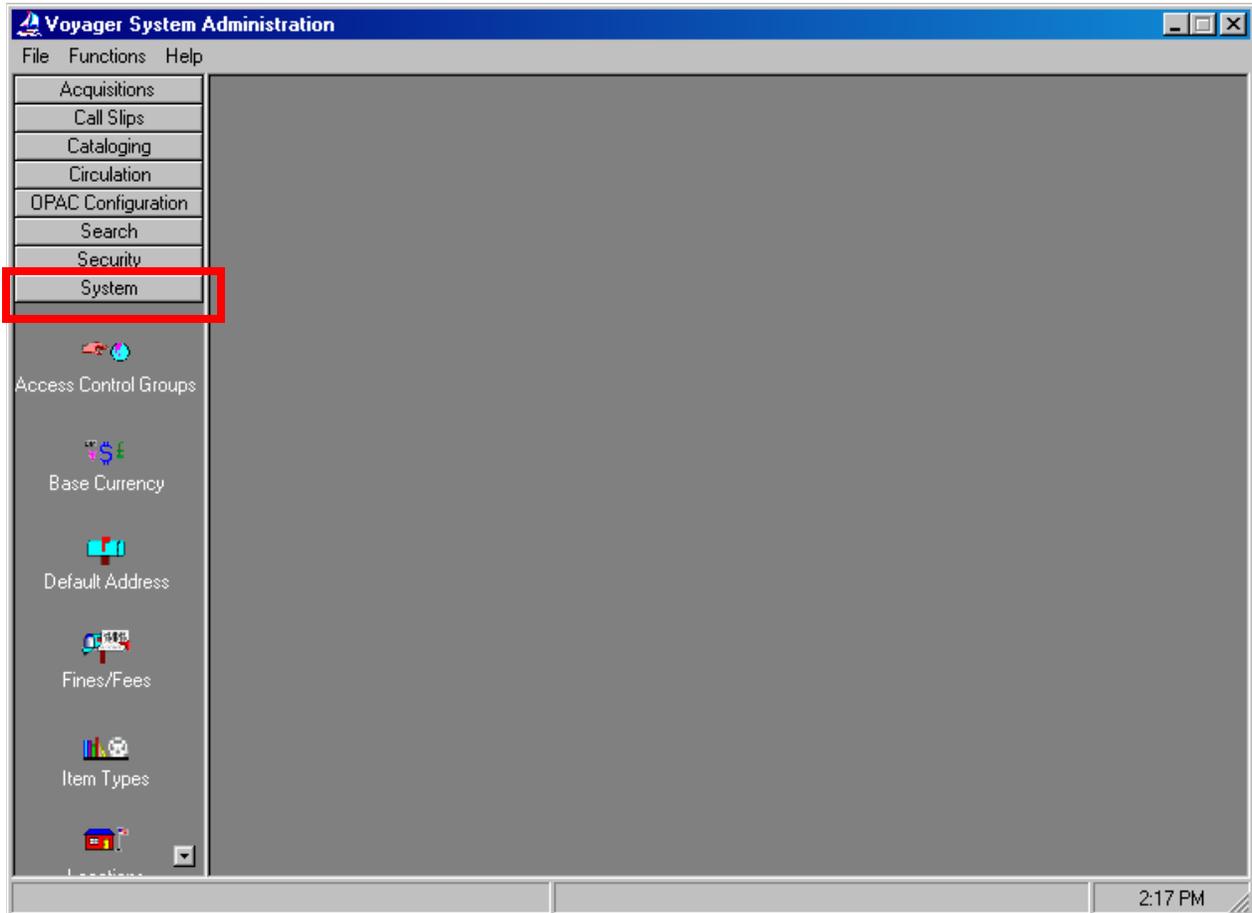


Voyager System Administration in I-Share Libraries

PART 1: SYSTEM



System Administration - System Workspace

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ 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

I. Introduction

This chapter of the I-Share System Administration document is a concise and annotated supplement to the System 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 System 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 10 for further detail.

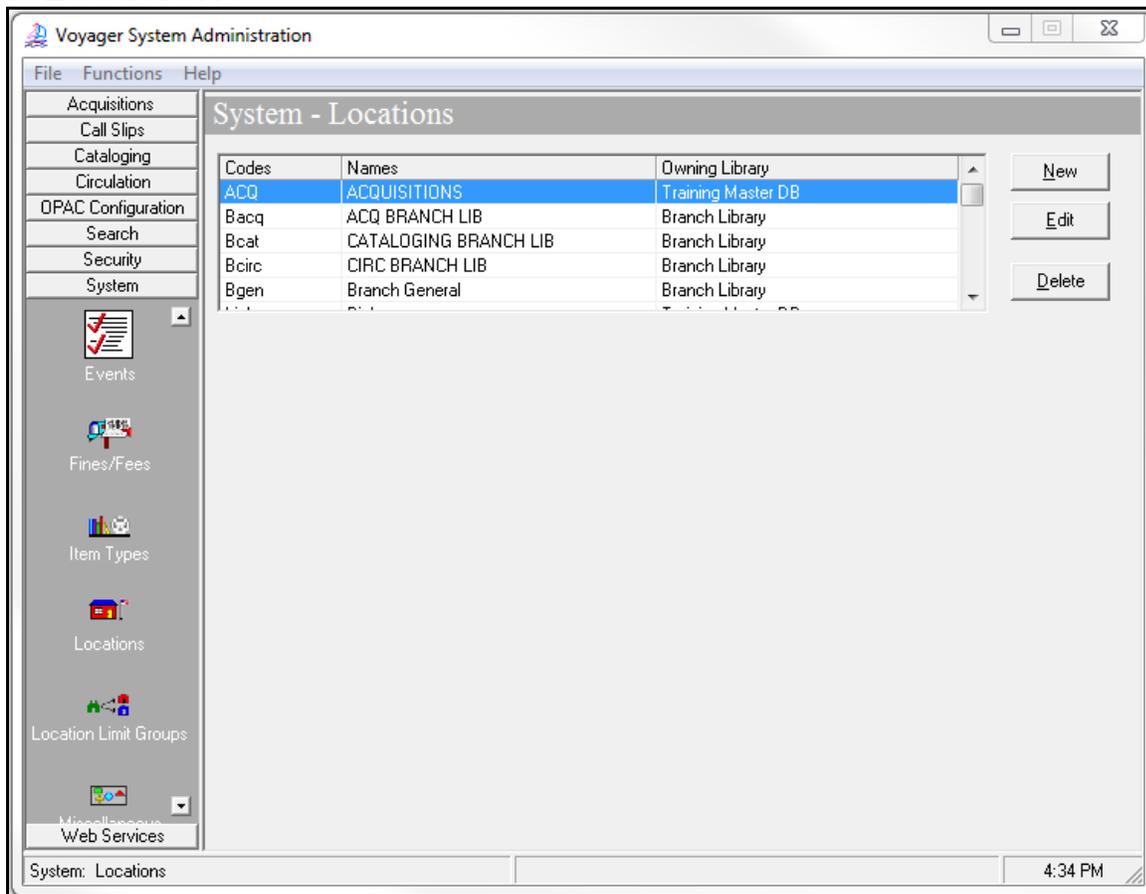
http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_System_Admin_9_1_1.pdf

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 System 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.

Legend:

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

II. Locations



System Locations Workspace

Review pages 10-39 through 10-64 of the Voyager 9.1.1 System Administration User's Guide for more information about System > Locations.

In the Locations section of SysAdmin, your library's system administrators may add, edit and deactivate locations, create location display names for staff modules and public interfaces, and enter addresses for selected Locations.

One of the early tasks of system administrators will be to translate Location Codes that Ex Libris entered during the bib load, from the library's location mapping table (i.e., the ABBA table) into more meaningful names for display in the staff clients and public interfaces. You will also need to add addresses for selected locations.

If your library wishes to add additional locations in the future, please consult the *Adding a Location in Voyager SysAdmin* documentation for the full profiling workflow:

<https://www.carli.illinois.edu/products-services/i-share/sysadmin/secure/addlocations>

⊕ Do not enter or edit any Location information until after your production Bib Load has been completed and accepted.

Legend:

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

Location Types

Locations are the foundation of the Voyager system. They define where library staff are allowed to perform circulation, cataloging, and acquisitions/serial functions. They decide where notices and reports are grouped. They become part of Policy Groups for Circulation, Acquisitions/Serials, and Cataloging. They are also referenced throughout the system in various ways: Storage Location, Destination Location, Permanent Location, Temporary Home, HAPPENING Location, Print Location, to name a few. However, Voyager Locations can be defined into three primary groups: *HAPPENING Locations*, *Storage Locations*, and *Print Locations*.

- A **HAPPENING Location** is where work activity takes place. Such Locations typically include circulation desks, a service point, a cataloging area, or an acquisitions area.

⊕ CARLI recommends that your library names your HAPPENING Locations with all capital letters (as described on page 6 of this document) to help distinguish them from Storage Locations. To reinforce this concept, we've capitalized all "HAPPENING" references in this document.

- A **Storage Location**, aka a Shelving Location, is where items are physically shelved, stored, or located. When Ex Libris initially creates your Voyager database, it is populated with the Storage locations your library identified in your "Location and Item Type Mapping Table" (i.e., the ABBA table).
- A **Print Location** is not a physical location, but rather a queue into Voyager directs files for the printing of notices and reports. For example, when the Circulation Server job that generates Patron Overdue Notices is run, Voyager will run the job against your library's whole database. Voyager will divide the output into the Print Locations each institution has defined. The output notices and reports can then be printed from any PC set up to run the Voyager Reporter Client.

It is imperative that you link the correct *Print Locations* to each *HAPPENING Location*. **Each HAPPENING Location must be assigned one Print Location.** The directions for assigning the print locations are found in the *Part 3: Circulation and Universal Borrowing SysAdmin Guide*, *Part 6: Cataloging*, and *Part 7: Acquisitions SysAdmin Guide*.

There is no limitation on the number of Locations a library may have.

Voyager usually sorts lists of locations in alphabetical order; however, you can force locations to the top of a list. Since periods come before spaces in the alphabet, and spaces come before letters, use periods and spaces to adjust the order in which locations are listed if your library has more than one circulation HAPPENING Location that staff will need to choose between.

Example:

```
..MAIN CIRCULATION DESK  
.CIRC DESK WELCOME CENTER  
BRANCH LIBRARY CIRC DESK  
GOV DOCS CIRC DESK  
MUSIC CIRC DESK
```

Legend:

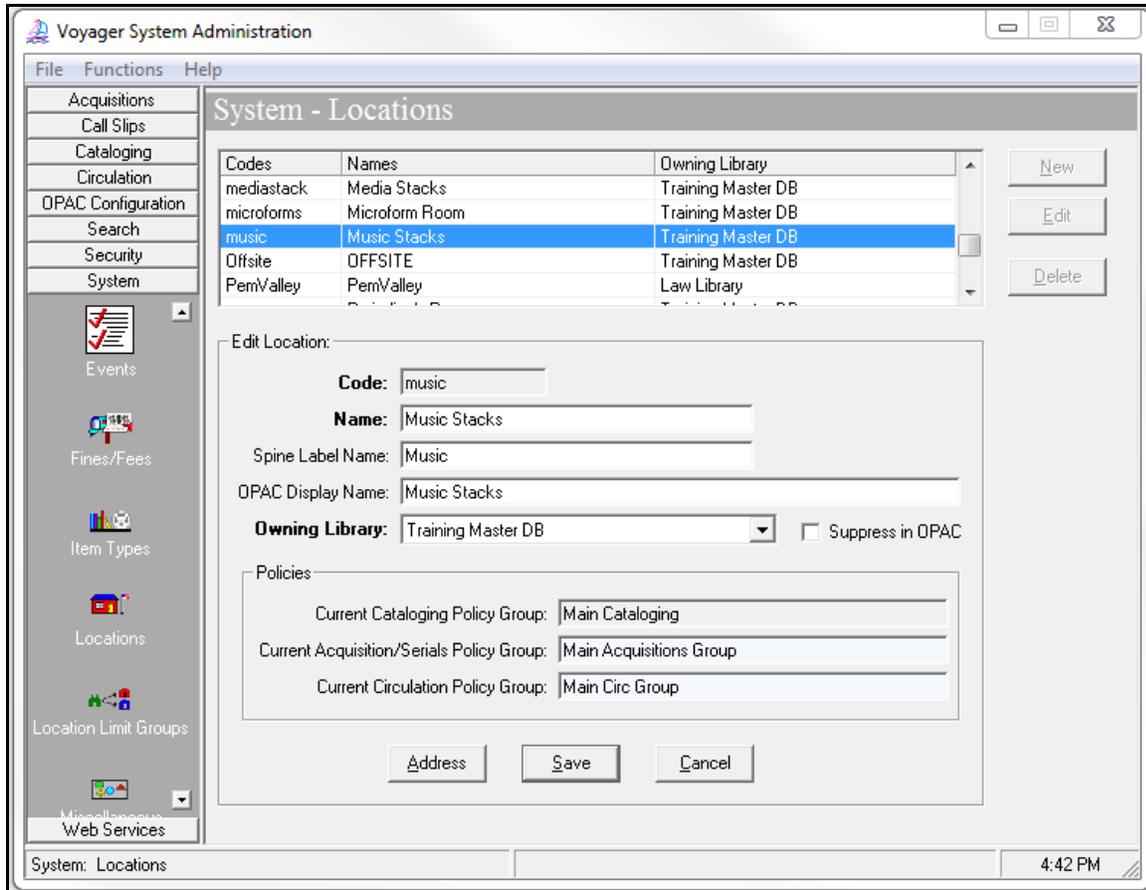
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

Adding/Editing Locations

As an early task in system administration, you will want to provide meaningful display names in the staff clients, and, if desired, informative display names in public catalogs.

In Voyager SysAdmin> System> Locations

- To Add a new location, click [New].
- To Edit an existing location, highlight the name and click [Edit].
- CARLI does not recommend deleting locations that have been previously used at your library. Instead, rename the location (for example: zzzStorageDONOTUSE) to denote its “Do Not Use” status, and adjust its availability for library staff in the SysAdmin> System> Security Profiles.



System- Locations Workspace

Description

<p>⊕ Location Code:</p>	<p>The location code displays for library staff in the MARC holdings records. Choose codes that make sense for your library and that will be easy for your catalogers.</p> <ul style="list-style-type: none"> • Required, up to 10 characters. • You cannot edit location codes once they have been saved.
--------------------------------	--

Legend:

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

<p>⊕ Location Name:</p>	<p>This name will display alphabetically in drop-down lists in the Voyager staff clients. Unless you enter an OPAC Display Name, Voyager will also display this name as your OPAC holdings location descriptions.</p> <ul style="list-style-type: none"> • Required, up to 25 characters • Do NOT use the ampersand (&) character. • If the location will be a HAPPENING location (see definition of HAPPENING on page 4 of this document), please enter the Location name in all Capital letters. • For the Circulation HAPPENING locations you will additionally enable to be patron request pick-up locations in Voyager> Circulation> Policy Definitions> Location tab, this Location Name will be shown in the OPAC in the list of available pick-up locations.
<p>Spine Label Name:</p>	<p>If you use Voyager to print spine labels for your materials, enter a name for a prefix that will print before the call number.</p> <ul style="list-style-type: none"> • Optional, up to 10 characters. • Multiple Locations may share the same Spine Label Name.
<p>OPAC Display Name:</p>	<p>If you enter an OPAC display name, this name will display in the OPAC. This enables libraries to enter a name that would be more meaningful/helpful to patrons trying to locate the item.</p> <ul style="list-style-type: none"> • Optional, up to 60 characters. • If you leave the OPAC Display Name blank, Voyager will display the <i>Location Name</i> in the OPAC.
<p>⊕ Owning Library:</p>	<p>An Owning Library provides an additional security mechanism for cataloging. Library staff with permissions to make edits at one Owning Library cannot change another owning library's bibliographic records without security access. Each Location must have an assigned Owning Library.</p> <ul style="list-style-type: none"> • Owning Libraries are defined in SysAdmin> System> Owning Libraries (as described on pages 23-24 of this document). • Voyager lists the available Owning Libraries here in drop-down list boxes.
<p>Suppress in OPAC:</p>	<p>If you check this box, holdings records cataloged into this Location will not display in the OPAC. This becomes the default suppression status for records being created for this Location.</p> <ul style="list-style-type: none"> • Checking this box does not retroactively update records previously created for this location. You would need to use the Cataloging client to suppress manually those holdings records (MFHDs) created before this option was enabled.
<p>Policies:</p>	<p>This section indicates which Cataloging, Acquisitions/Serials, or Circulation policy groups have the location assigned.</p>

Legend:

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

Adding an Address for HAPPENING Locations

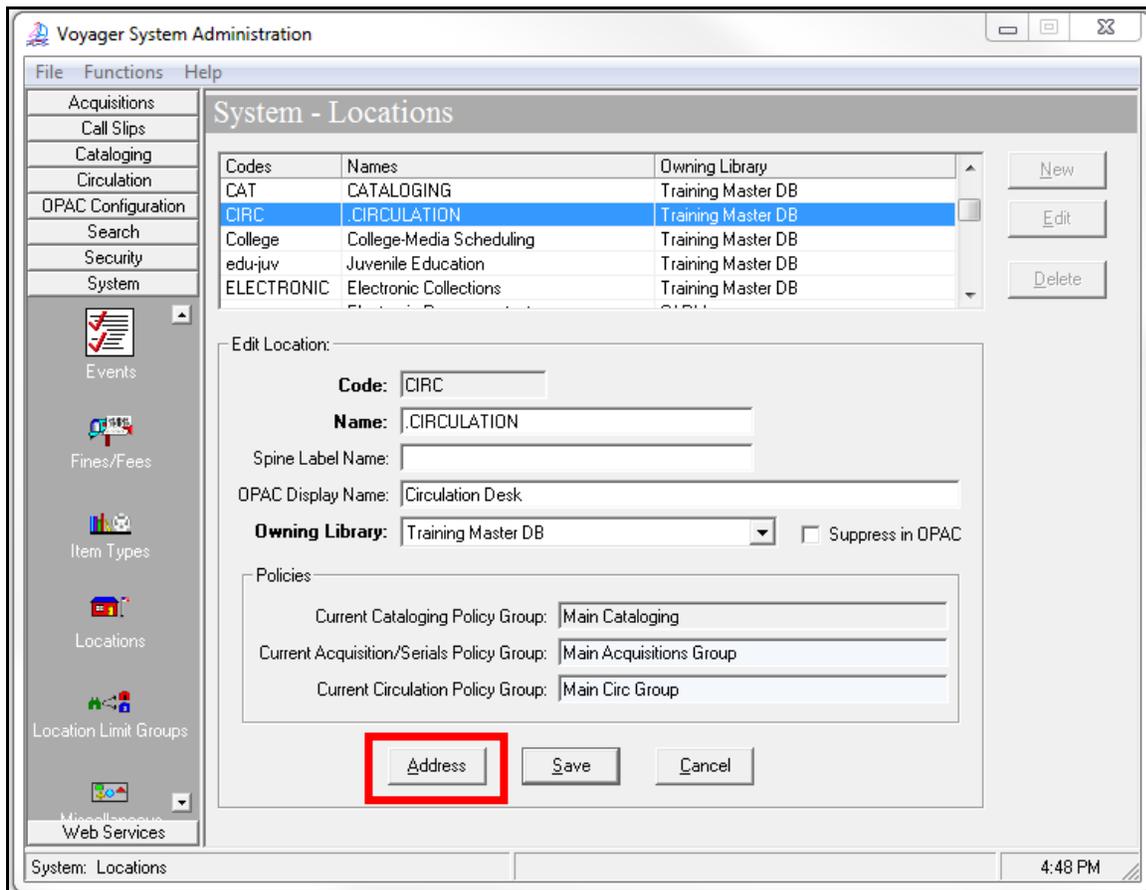
You should enter an address for each HAPPENING Location. To learn more about how Voyager uses the addresses you enter, review the document *Library Addresses in Voyager: How and When they Appear*:

<https://www.carli.illinois.edu/products-services/i-share/circ/secure/LibraryAddressInVoyager>

- If you do not enter an address for your HAPPENING Locations, the system uses the Default Address on reports and notices. See page 13 of this document.

Review pages 10-51 through 10-56 of the Voyager 9.1.1 System Administration User's Guide for more information about adding an address for a HAPPENING Location.

To add/edit a HAPPENING Location's address, click on the [Address] button at the bottom of the Edit Location screen:



System- Locations – Address button for HAPPENING location

Legend:

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

The edit Address window will open:

The screenshot shows the 'System Address' window with the following details:

- Address Type:** Street (checked), Circ Desk (checked), Ship To (unchecked), Bill To (unchecked), Campus (unchecked), Other (unchecked).
- Address:** ILDS: CAR, 100 Trade Centre Drive.
- City:** Champaign
- St/Province:** IL, **Zip/Postal Code:** 61820
- Phone Numbers Table:**

Type	Number
Primary	[217] 244-7593

System- Locations – Edit Address window for HAPPENING location

You may add up to 6 addresses for a single HAPPENING Location.

Description of Address Type Checkboxes:

<p><i>Ship to Address:</i></p>	<p>Check this box to enable the address to appear on a purchase order. This address will display for all Locations in the Acquisitions Policy Group.</p> <ul style="list-style-type: none"> ⊕ Required for Acquisitions HAPPENING locations.
<p><i>Bill to Address:</i></p>	<p>Check this box to enable a separate billing address to appear on a purchase order. This address is linked to the order/claim/pay Locations in the Acquisitions Policy Group. If the Bill to Address is not checked, the address defaults to the Bill to Address for the order location.</p> <ul style="list-style-type: none"> ⊕ Required for Acquisitions HAPPENING locations.

Legend:

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

Street Address:	Check this box to link the address to the Circulation Policy Group. Check this checkbox so that it can print on patron circulation notices. <ul style="list-style-type: none"> ⊕ Required for Circulation HAPPENING locations.
Campus Address:	[Optional] Check this box to link the address to the Acquisitions Policy Group. If the Location has a campus address, it prints on the routing list.
Circ Desk Address:	Check this box to link the address to the Circulation Policy Group. This is the address that will print on holds and recalls. <ul style="list-style-type: none"> ⊕ Required for Circulation HAPPENING locations.
Other Address:	[Optional] This address type can be used for institution specific needs. Some institutions use this for a campus administrative office or the registrar's office.

Description of Address Fields:

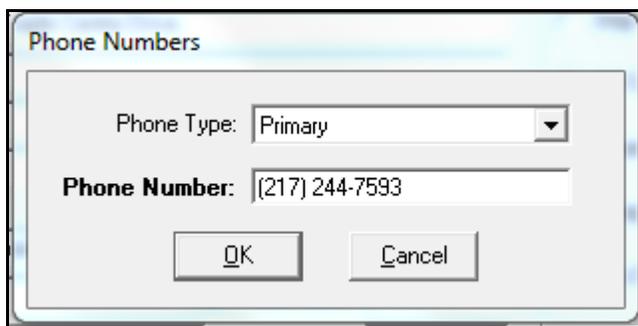
Contact Name:	[Optional, up to 50 characters] CARLI will need to do more testing to see if this name is still used by Voyager 9.1.1. <ul style="list-style-type: none"> If you enter a Contact Name, enter a title, such as "Patron Billing Coordinator".
E-mail:	[Optional, up to 50 characters] CARLI will need to do more testing to see if this email address is used by Voyager 9.1.1. <ul style="list-style-type: none"> If you enter an e-mail address, enter a departmental email address, such as refdesk@school.edu
⊕ Address Line 1:	<ul style="list-style-type: none"> If this is a Circulation HAPPENING Location, enter your library's ILDS code as the first line of the address. If this is a Cataloging or Acquisitions HAPPENING Location, enter the first line of your mailing address. <ul style="list-style-type: none"> ○ Required, up to 50 characters.
Address Lines 2-6:	[Optional, up to 50 characters] Review the document <i>Library Addresses in Voyager: How and When they Appear</i> : https://www.carli.illinois.edu/products-services/i-share/circ/secure/LibraryAddressInVoyager to help you decide which information to enter on which subsequent address lines.
⊕ City:	Enter your City name. <ul style="list-style-type: none"> Required, up to 30 characters.
⊕ State/Province:	Enter your state postal abbreviation (IL). <ul style="list-style-type: none"> Required, up to 7 characters.

Legend:

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

⊕ Zip/Postal Code:	Enter your zip code. <ul style="list-style-type: none"> • Required, up to 10 characters.
Country:	[Optional] Enter your country, up to 20 characters.
SAN:	[Optional, up to 10 characters] In the U.S., SANs are assigned by R. R. Bowker. <ul style="list-style-type: none"> • Most SANs are eight characters but two-character prefixes are sometimes used. • Vendors typically use SANs. If you have a SAN, you can enter it.

To enter a phone number, click the [Add] button and complete the Phone Numbers pop up box.



System- Locations – Edit Address for HAPPENING location, Phone Number option

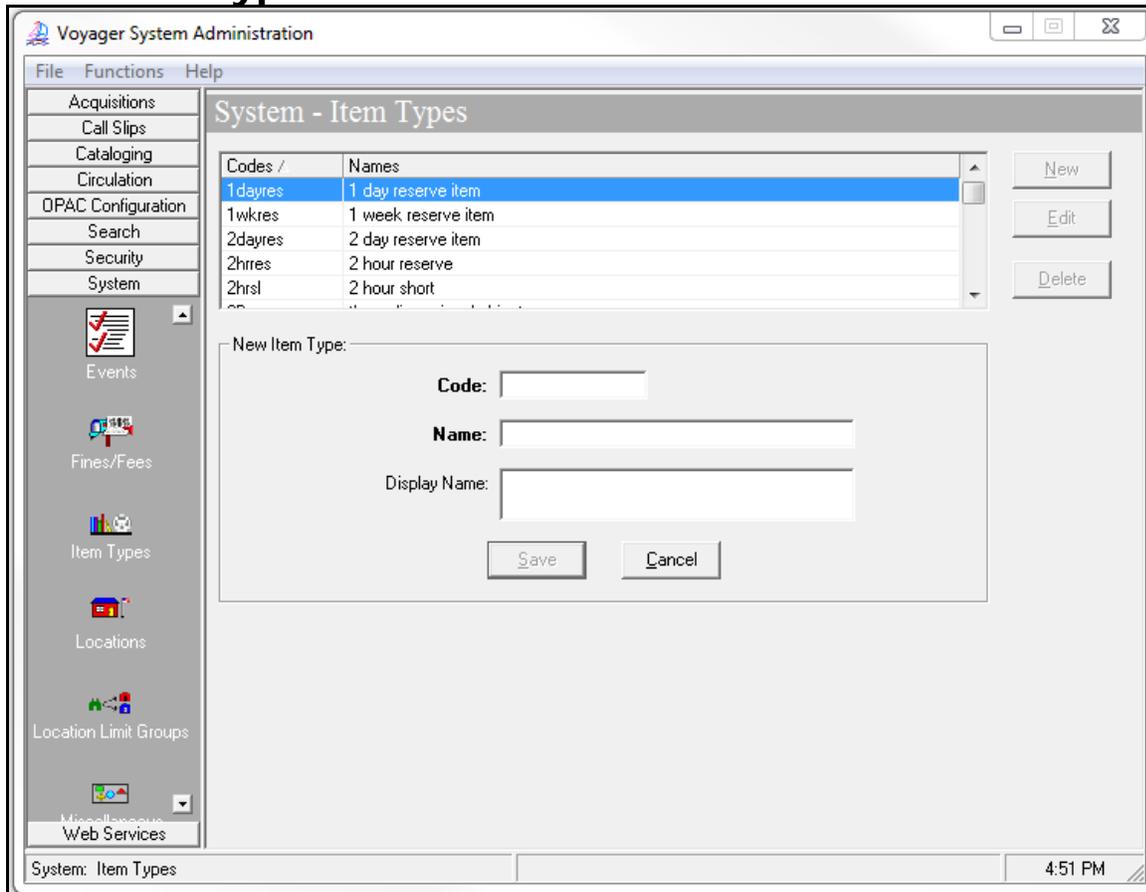
Description:

Phone Number Type:	[Optional] Review the document <i>Library Addresses in Voyager: How and When they Appear</i> : https://www.carli.illinois.edu/products-services/i-share/circ/secure/LibraryAddressInVoyager to see where phone numbers are used. <ul style="list-style-type: none"> • The drop-down list box contains four phone types: Primary, Mobile, Fax, Other.
Phone Number:	[Optional, up to 25 characters] You may enter as many phone numbers of any type as you need. Be sure to include the area code.

Legend:

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

III. Item Types



System- Item Types- Add/Edit Workspace

Review pages 10-34 through 10-38 of the **Voyager 9.1.1 System Administration User's Guide** for more information about System > Item Types.

You may also review the *I-Share Voyager Item Type Codes* documentation:
<https://www.carli.illinois.edu/products-services/i-share/cat/itemtypes>

Description:

<p>⊕ Item Type Code:</p>	<p>You cannot change the Item Types Codes that are loaded during the initial conversion to Voyager.</p> <p>⊕ If your library would like to add additional Item Type Codes in the future, select previously unused codes from the CARLI list of Item Type Codes (listed on page 12 of this document).</p>
<p>Item Type Name:</p>	<p>This is how the item type will display in the staff clients. You may change this Name as needed for your library.</p> <ul style="list-style-type: none"> • Alphanumeric, up to 25 characters.

Legend:

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

∅ <i>Display Name:</i>	∅ Voyager no longer uses this functionality. Leave blank.
------------------------	---

⊕ **Use only the following item type codes:**

Book1	AV3	VideoRE	Map1	Reserve3	Archive2
Book2	AVN	VideoLR	Map2	Reserve4	Archive3
Book3	AVRE	Micro1	Map3	Reserve5	ArchiveN
BookN	AVLR	Micro2	MapN	Reserve6	ArchiveRE
BookRE	Recording1	Micro3	MapRE	Reserve7	ArchiveLR
BookLR	Recording2	MicroN	MapLR	Reserve8	Electronic1
Serial1	Recording3	MicroRE	Software1	ReserveN	Electronic2
Serial2	RecordingN	MicroLR	Software2	Realia1	Other1
Serial3	RecordingRE	Score1	Software3	Realia2	Other2
SerialN	RecordingLR	Score2	SoftwareN	Realia3	Other3
SerialRE	Video1	Score3	SoftwareRE	RealiaN	OtherN
SerialLR	Video2	ScoreN	SoftwareLR	RealiaRE	OtherRE
AV1	Video3	ScoreRE	Reserve1	RealiaLR	OtherLR
AV2	VideoN	ScoreLR	Reserve2	Archive1	Error

The "ERROR" code is intended for fall-out types during the conversion and will also be used as a default for records loaded by Bulk Import when an appropriate Item Type mapping has not been made.

The meanings of the suffixes on the list of codes above are: N for Non-circulating, RE for Request Exempt, and LR for Local Request. The numbers are a basic way to differentiate between similar types of an item. As an example, your library may name Reserve1 and Reserve2, "2 Hour Reserve" and "1 Day Reserve".

- N (Noncirculating) is often used to denote items which cannot be borrowed nor requested, such as Reference or Special Collections materials.
- RE (Request Exempt) is often used to denote items which cannot be requested through I-Share Interlibrary Loan, but that can be checked out by UB patrons if borrowed on site.
- LR (Local Request) is often used to denote items which can be borrowed by local patrons on site, can be requested by local patrons through the OPAC for local pick-up, but cannot be requested through I-Share, nor checked out by UB patrons even if they are on site.
- All three of these item types have been interpreted differently when considering local call slips (local patrons requesting local items to be pulled for easy pickup at the local happening location). However, most commonly libraries use RE (Request Exempt) to mean that the item cannot be requested through either I-Share or Local Call slip. They then use LR (Local Request) to mean that local patrons can still use Local Call slip. Items with the code of N (Noncirculating) cannot be requested through either I-Share or Local Call slip.

For catalogers:

- The chart lists the valid Voyager item type code abbreviations for use in any of the modes that create item records. The abbreviated codes in the chart are to be used for data entry in the MARC Item Type field, which corresponds to the 049 \$I (the letter EL, not the number 1).

Legend:

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

IV. Default Address

The screenshot shows the 'System - Default Address' configuration window. The form contains the following fields and values:

- Library Name:** Consortium of Academic and Research Libraries
- Contact Name:** (empty)
- E-mail:** support@carli.illinois.edu
- Address:** ILDS: CAR
100 Trade Centre Dr.
- City:** Champaign
- State/Province:** IL
- Zip/Postal Code:** 61820
- Country:** USA
- SAN:** (empty)

Buttons: Save, Cancel, Clear

System- Default Address edit workspace

Review pages 10-15 through 10-20 of the **Voyager 9.1.1 System Administration User's Guide** for more information about **System > Default Address**.

The default address is most commonly used with UB reports and notices, as well as Acquisitions Purchase Orders where only the *Site* is selected, and the *Ship To* and *Bill To* locations are not chosen.

- Review the document *Library Addresses in Voyager: How and When they Appear*: <https://www.carli.illinois.edu/products-services/i-share/circ/secure/LibraryAddressInVoyager> for more information on where the default address will be used in Voyager.
- Review pages 7-10 of this document to learn more about location-specific addresses.

⊕ **You MUST enter a complete Default Address.**

- You should choose your library's primary mailing address as your Default Address. If your campus has multiple branches, choose the address for the branch that handles the most interlibrary loan and patron billing transactions.

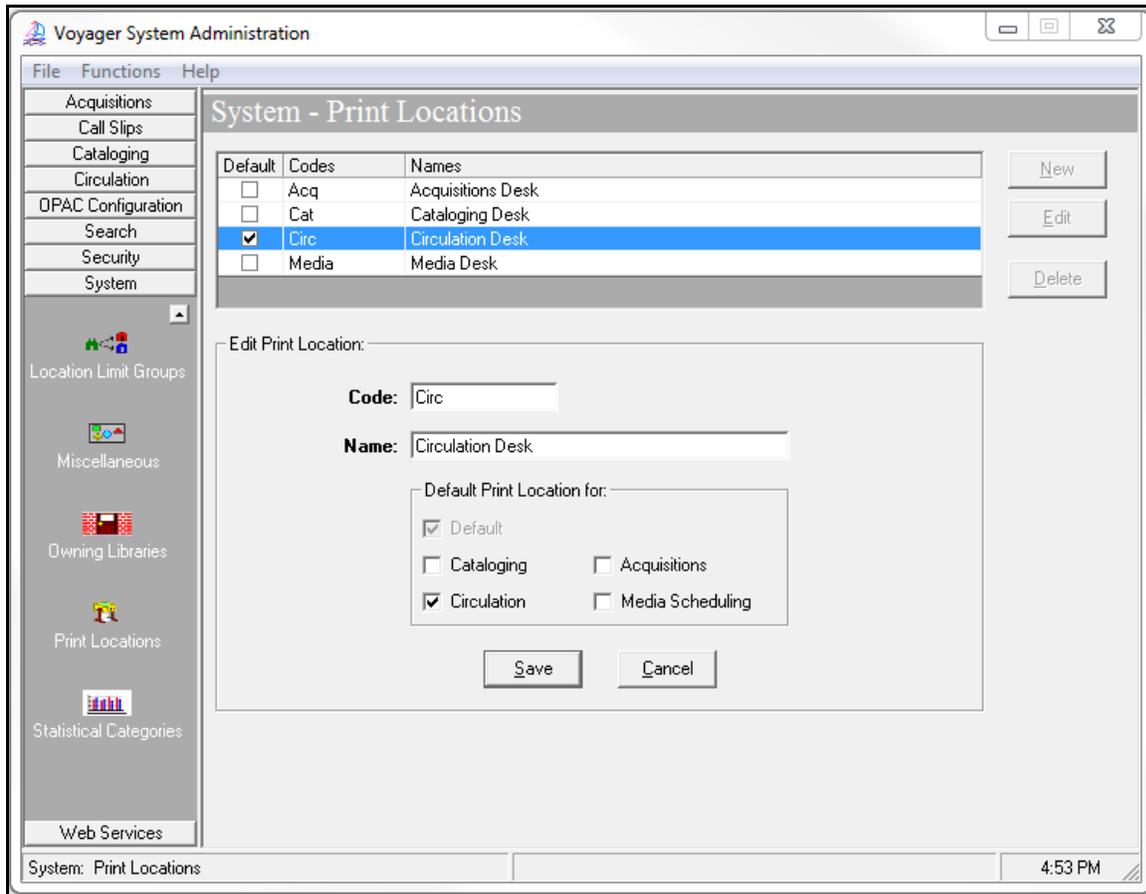
⊕ **Include your ILDS routing info for the first line of the address.**

The save button remains greyed out until you have filled in all required fields (those with bold labels).

Legend:

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

V. Print Locations



System- Print Locations, Edit Print Location workspace

Review pages 10-80 through 10-92 of the Voyager 9.1.1 System Administration User's Guide for more information about System > Print Locations.

Print Locations are used to group reports and notices together for printing in the Voyager Reporter client. (They are not physical printing locations.) You will assign a Print Location for each Circulation HAPPENING Location and Acquisitions HAPPENING Location in the associated Policy Definitions.

When certain actions take place in Voyager, for example, Voyager generates a claim for a missing issue or updates an item's status to "Overdue", when CARLI runs the corresponding "job" on our servers, Voyager electronically generates a report of claimed items or an overdue notice. Print Locations are queues into which the reports and notices are organized. Library staff must then, in the Voyager Reporter client, choose a Print Location to access and print out the reports and notices gathered in that Print Location.

To review what Print Locations are used for queueing, review the *Voyager Reporter Client: Instructions and FAQ* documentation: <https://www.carli.illinois.edu/products-services/i-share/execute/secure/VoyagerReporter> under the section, "What will the Reporter Client generate?"

Legend:

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

⊕ Create four initial Print Locations, one for each of the four Voyager modules that can generate content for the Voyager Reporter Client (even if your library will not be using all modules at the beginning of your Voyager implementation):

- Acquisitions
- Cataloging
- Circulation
- Media Scheduling

If your library has more than one branch location for Circulation, Cataloging, Acquisitions, or Media Scheduling, contact CARLI Support at support@carli.illinois.edu before entering your Print Locations to discuss the most efficient initial print location setup.

- To review your library's existing Circulation Print Locations, read the *Patrons Receiving Circulation Notices* documentation: <https://www.carli.illinois.edu/products-services/i-share/circ/secure/PatronCircNotices> under the "Part 1: Proper Print Location Set-Up" section.

Description:

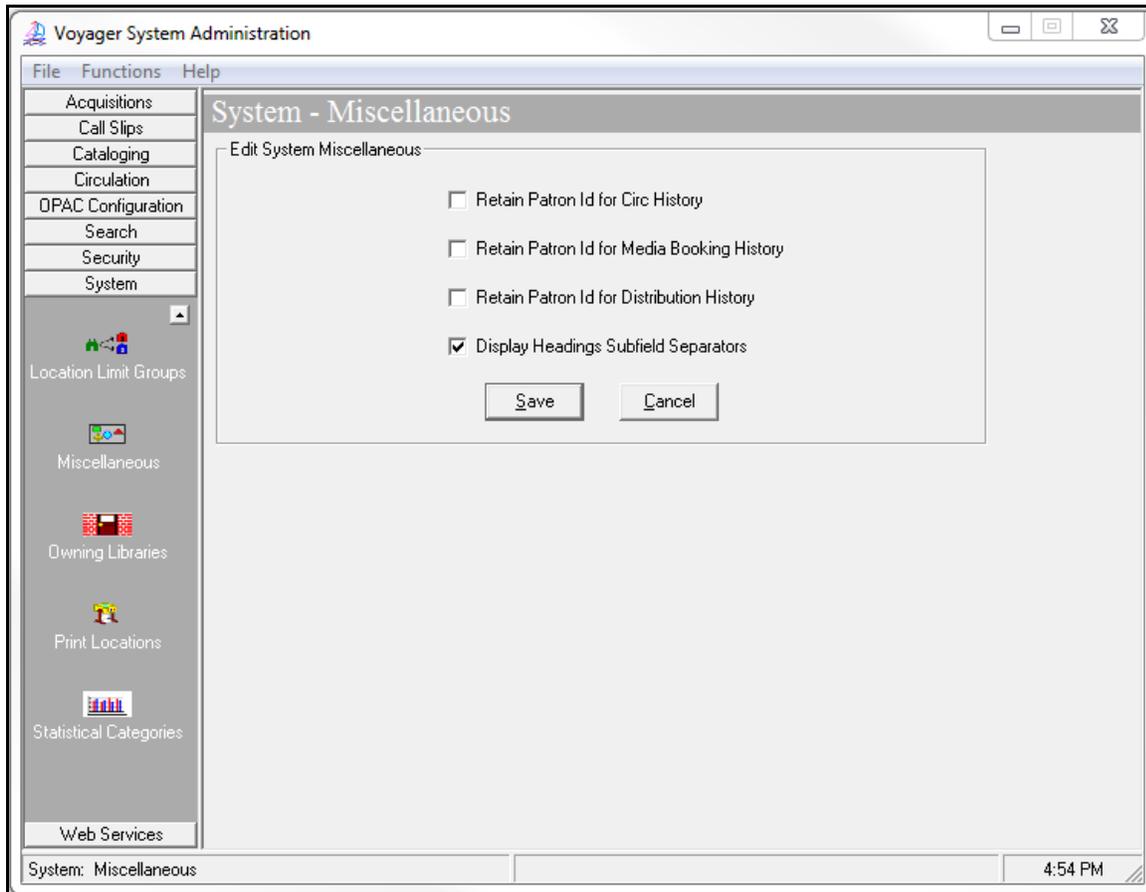
<i>Location Code:</i>	This code becomes part of the input file name of the files used by the Reporter Client. <ul style="list-style-type: none"> • The code can be alphanumeric, up to 10 characters, • Do not use the slash (/) or space.
<i>Location Name:</i>	Choose a meaningful name that describes what area this Print Location covers. <ul style="list-style-type: none"> • This Name will display within the Circulation and Acquisitions Policy Groups when you choose the "Default Print Location" for a Location. • This name also displays in Voyager Reporter when you choose the "Processing Location" in the Reporter Client. • Alphanumeric, up to 25 characters.
<i>Default Print Location For:</i>	For the primary print location of each client type, check the checkbox for the corresponding client. ⊕ For your primary Circulation Print Location, in addition to the "Circulation" checkbox, check the "Default" checkbox.

Only one Print Location can serve as the Default Default Print Location. The Default Default Print Location is denoted by a checkmark on the opening Print Location screen.

Legend:

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

VI. Miscellaneous



System- Miscellaneous workspace

Review pages 10-69 through 10-74 of the Voyager 9.1.1 System Administration User's Guide for more information about System > Miscellaneous.

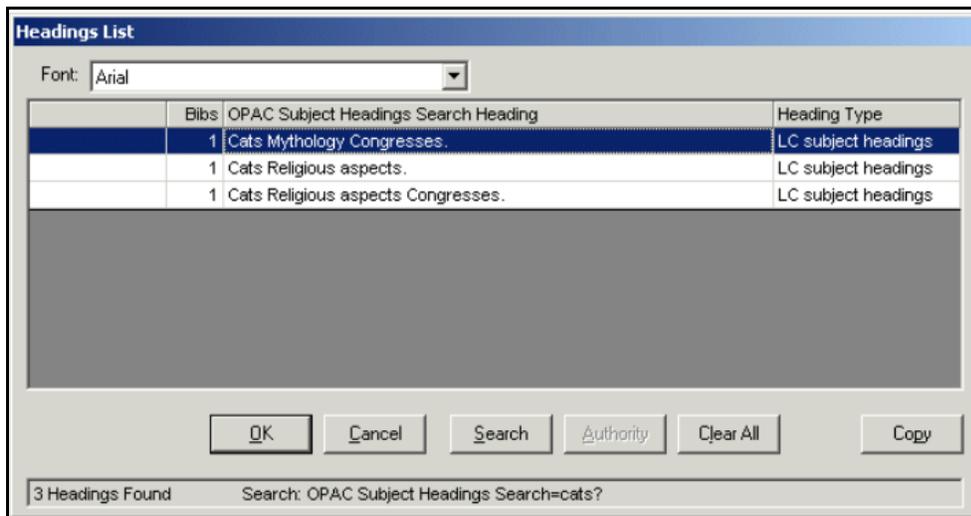
Description:

<p>⊕ Retain Patron ID for Circ History: ⊕ Retain Patron ID for Media Booking History: ⊕ Retain Patron ID for Distribution History:</p>	<p>If any of the three "Retain Patron Id" boxes is checked, a patron's identity is tracked along with circulation history. The I-Share consortial requirement is that patron information will <i>not</i> be retained with circulation history.</p> <p>⊕ All three "Retain Patron Id" items MUST be UN-checked.</p>
---	---

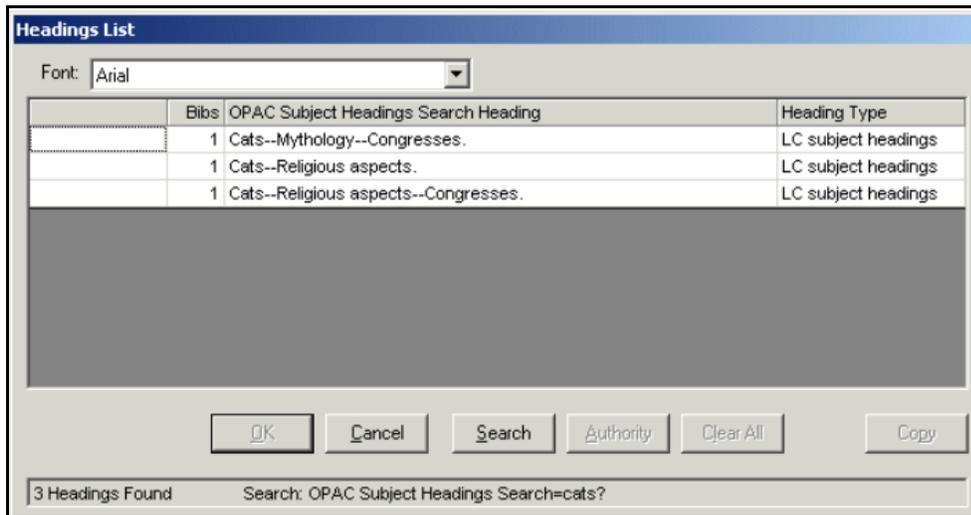
Legend:

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

<input checked="" type="checkbox"/> Display Headings Subfield Separators:	<p>When you check the “Display Headings Subfield Separators” feature, Voyager displays a double dash (--) separator between heading subfields in search results in the Voyager staff clients to enhance readability.</p> <ul style="list-style-type: none"> • If you do not check this checkbox, new records added to the database will not have the subfield separator added to the display. This will result in inconsistent displays in the staff clients. <p><input checked="" type="checkbox"/> CARLI recommends check this box.</p>
--	---



Screenshot shows the results of a subject headings search of the keyword "cats?" **without** subdivision separators.

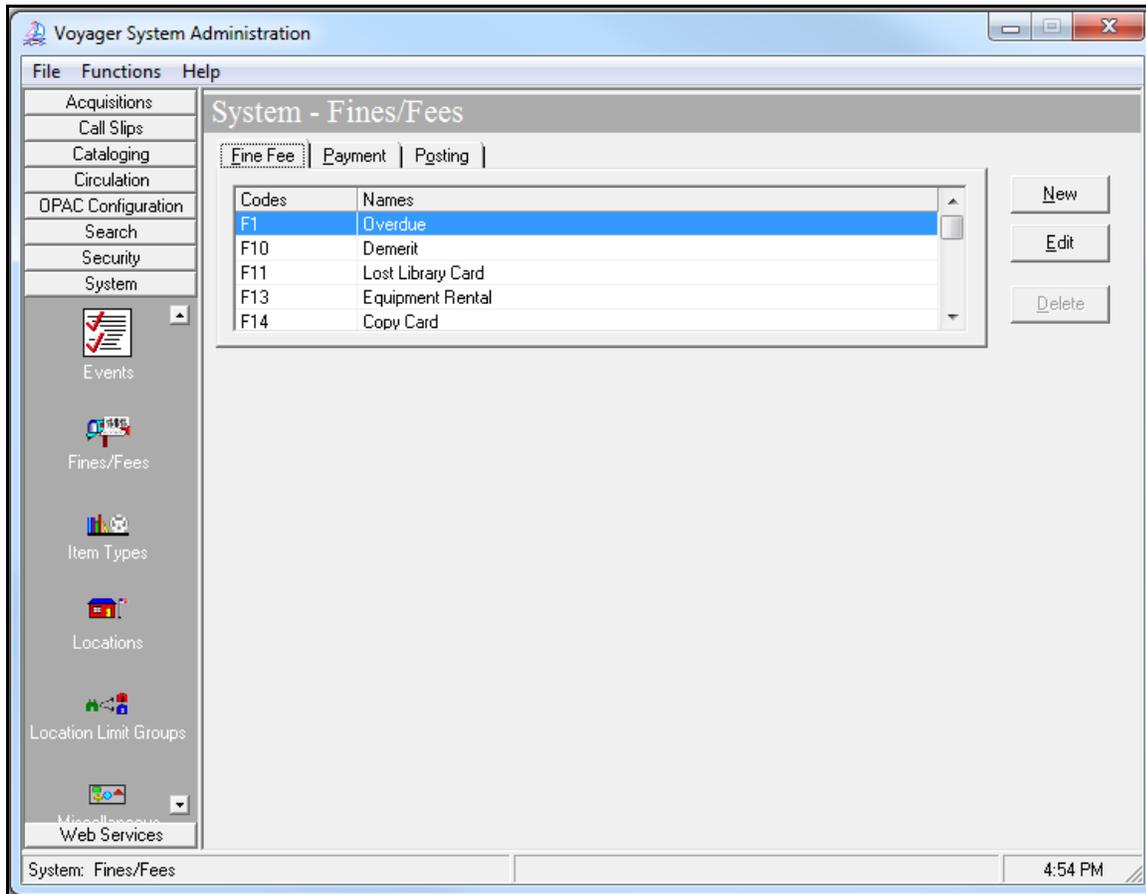


Screenshot shows the results of a subject headings search of the keyword "cats?" **with** subdivision separators.

Legend:

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

VII. Fines/Fees



System- Fines/Fees workspace

Review pages 10-23 through 10-34 of the Voyager 9.1.1 System Administration User's Guide for more information about System > Fines/Fees.

In this section, you can define:

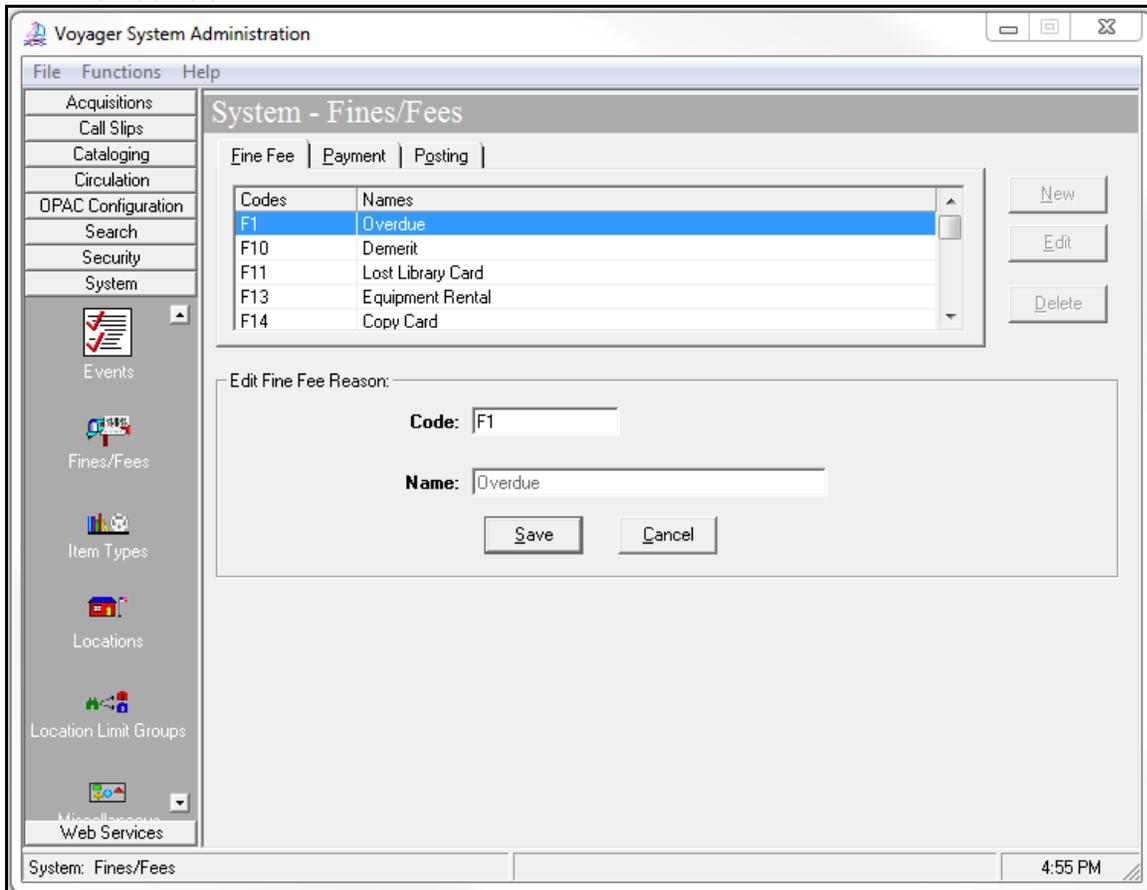
- Fine/fee reasons: This refers to a penalty fine or a service/product fee that you assess against patrons.
- Payment types: This defines what forms of payment are accepted by your library when you collect fines/fees from your patrons and post payments in the Voyager circulation module.
- Posting types: This identifies the posting types that are System provided or are uniquely created for your institution.

For all three tabs, click the appropriate button to [Edit] or add a [New] reason.

Legend:

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

A. Fine Fee Tab



System- Fines/Fees- Fine Fee Tab, Edit screen

⊕ You may edit and/or add fine/fee reasons only *after* the fine/fee load (or circ transaction load, if no fine/fee load is done) has been accepted.

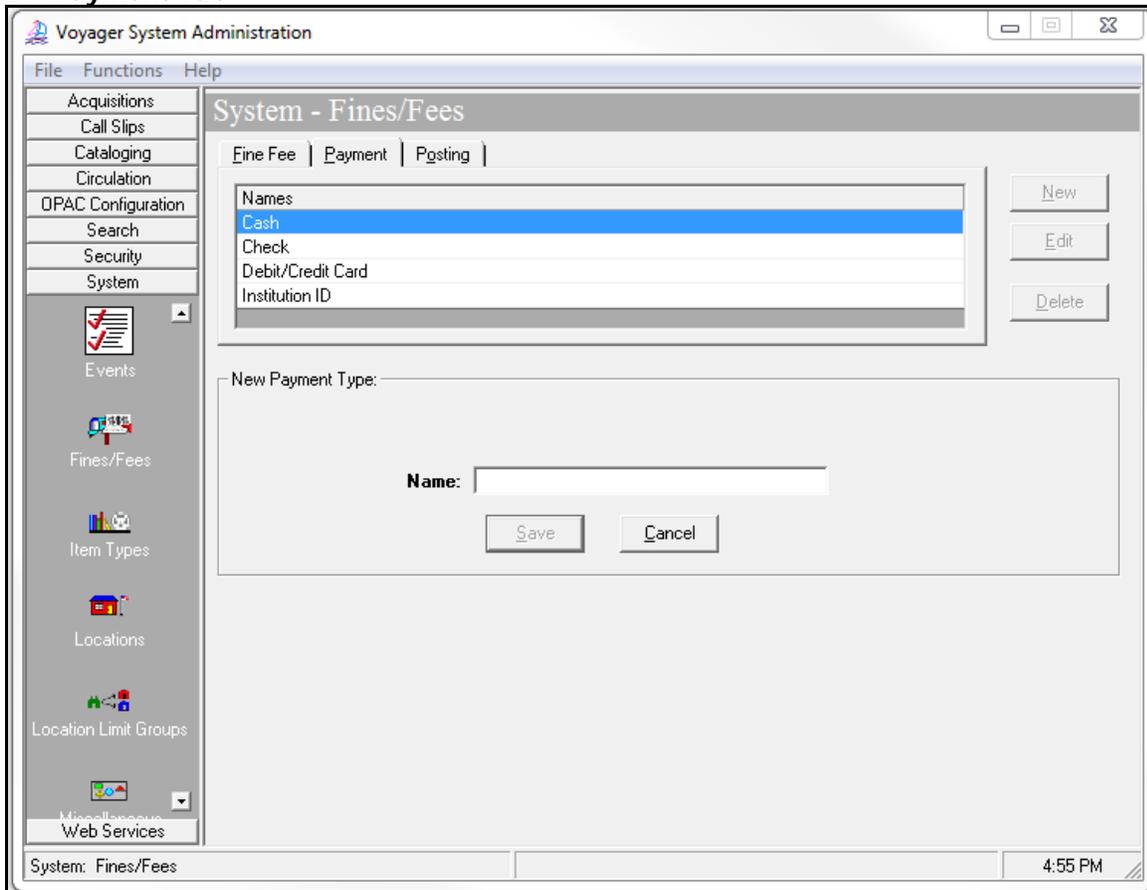
The following Fine/Fee Reasons are created by the Voyager installation and cannot be deleted. If your library has elected to do a fine/fee load, any additional codes you may have used will be populated during the load. Other codes may be added as you need them.

Fine/Fee Reason Code	Fine/Fee Reason Name
F1	Overdue
F2	Lost Item Replacement
F3	Lost Item Processing
F4	Media Booking Late Charge
F5	Media Booking Usage Fee
F6	Equipment Replacement
F7	Lost Equipment Processing
F8	Accrued Fine
F9	Accrued Demerit
F10	Demerit

Legend:

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

B. Payment Tab



System- Fines/Fees- Payment Tab, New screen

The Cash and Check fee payment types are installed with Voyager; they cannot be edited. After your library's circ load is accepted, you may add other payment types as needed.

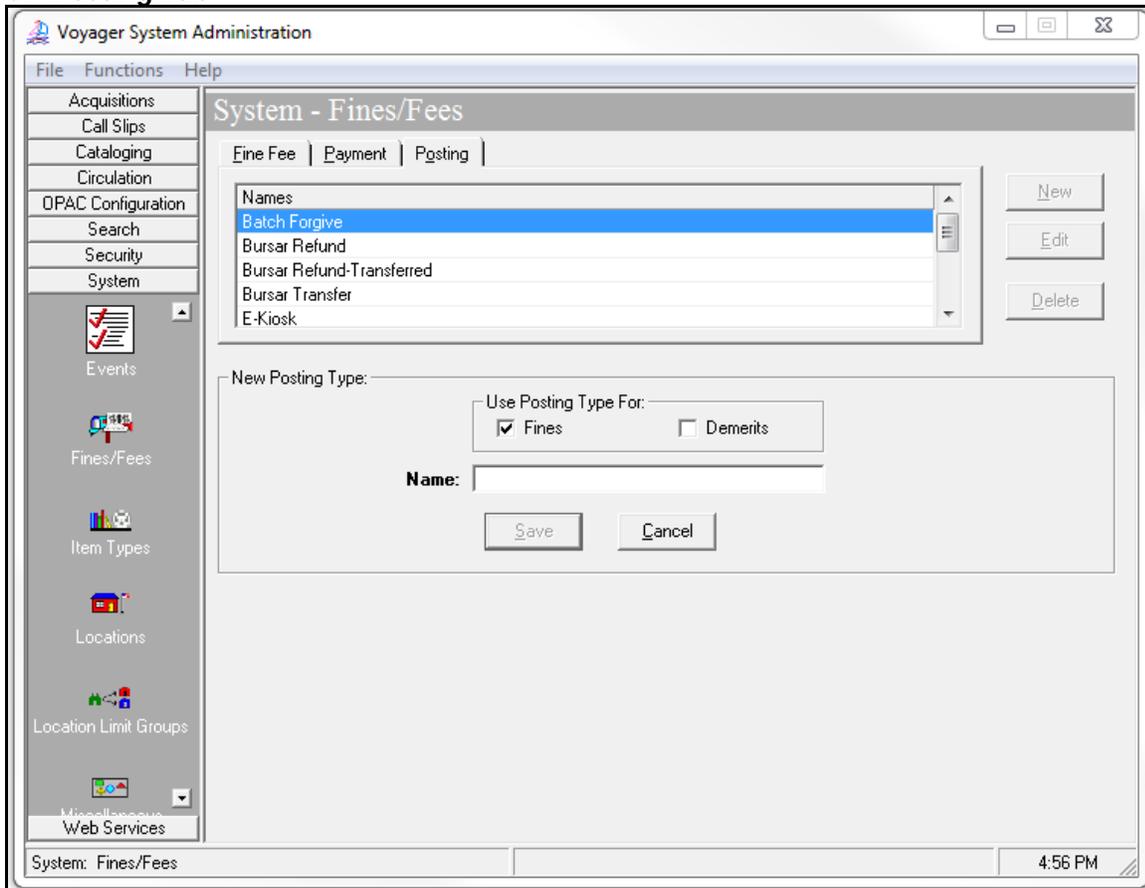
Description:

Name:	Name of the payment type. <ul style="list-style-type: none"> • Alphanumeric, maximum 25 characters.
--------------	--

Legend:

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

C. Posting Tab



The

System- Fines/Fees- Posting Tab, New screen

Use the Posting tab to view the complete list of posting types (including the system-provided types) and create/manage your site-specific posting types.

The system-provided posting types are:

- Batch Forgive
- Bursar Refund
- Bursar Refund-Transferred
- Bursar Transfer
- E-Kiosk
- Error
- Forgive
- Payment
- Refund
- Suspension

Some of the system-provided posting types that display in System Administration on the Posting tab are not available in the Circulation client. These serve other purposes. System processes use the bursar transfer posting type, for example.

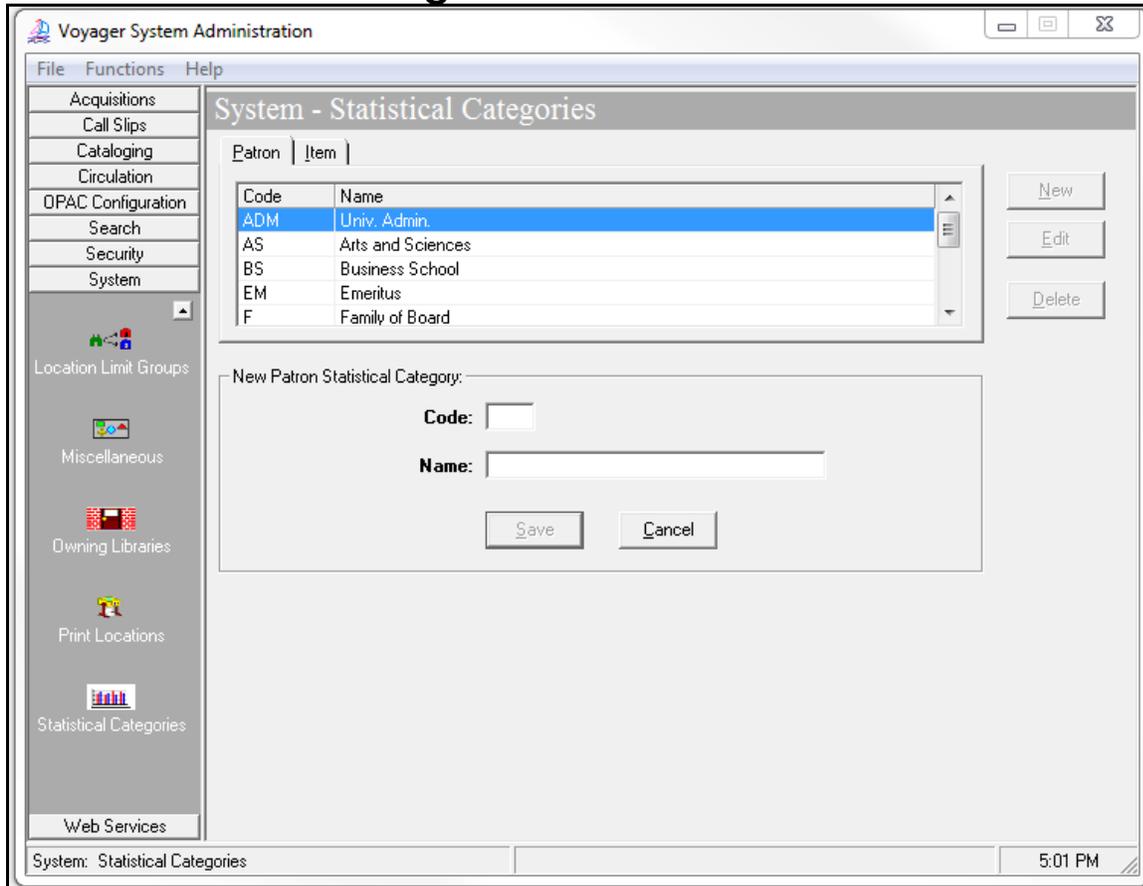
Description:

Name:	Name of the posting type. <ul style="list-style-type: none"> • Alphanumeric, maximum 25 characters.
Use Posting Type For:	I-Share libraries do not use Demerits. Check the checkbox to denote that the Posting can be used against Fines.

Legend:

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

VIII. Statistical Categories



System- Statistical Categories, new

Review pages 10-92 through 10-103 of the Voyager 9.1.1 System Administration User's Guide for more information about System> Statistical Categories (Patron and Item).

OPTIONAL: There are two types of statistical categories: patron and item. These do not affect circulation policies, but they can be used for data collection and analysis, via reports.

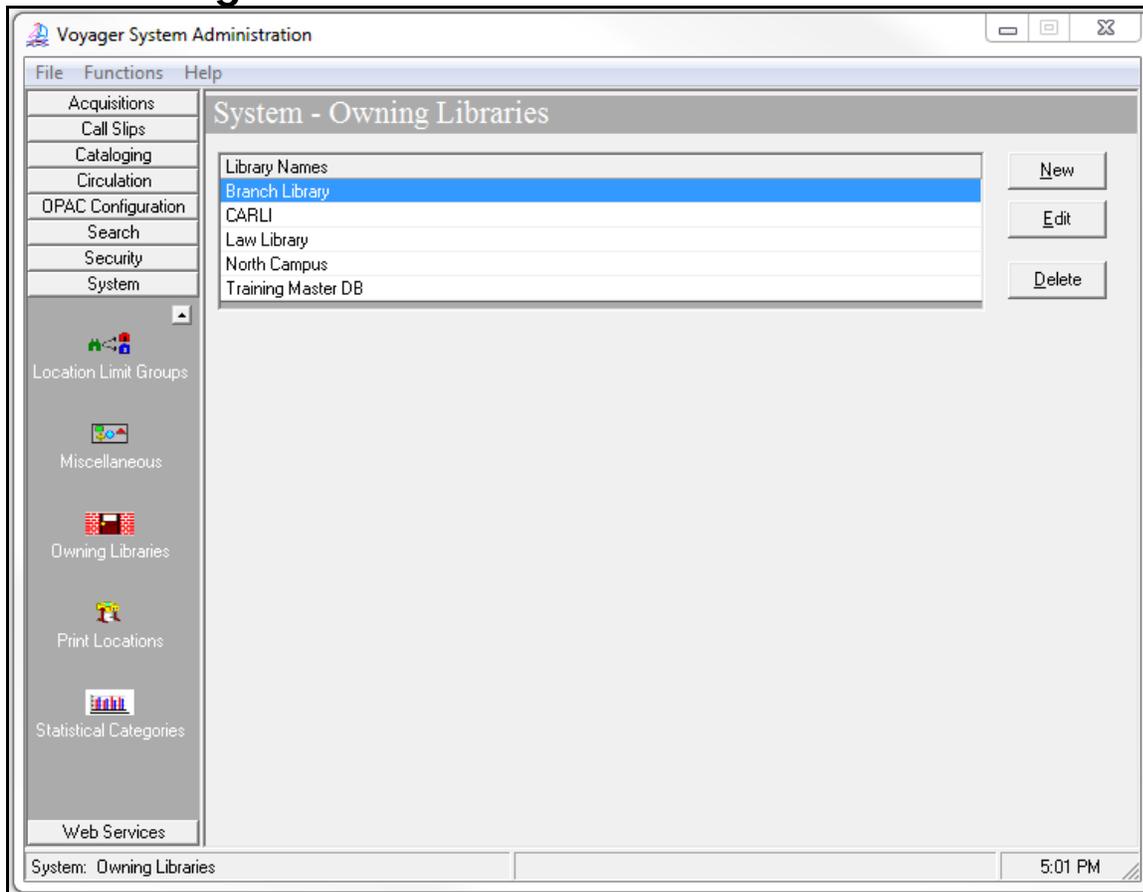
- New patron or item statistical category codes can be up to 3 alphanumeric characters in length.
- Their display names can be up to 25 alphanumeric characters, including spaces and punctuation.
- A new Voyager database contains the following patron statistical categories by default: ADM, AFF, FAC, LIB, STF, and STU. No item statistical categories are generated by default.
- If your library elected to assign either item or patron statistical category values during your data load, you may edit the display names after acceptance of the applicable data load.

⊕ Do not create any new item statistical categories before you've accepted your library's production bib load. Do not create any new patron statistical categories before you've accepted your library's production patron load.

Legend:

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

IX. Owning Libraries



System- Owning Libraries

Review pages 10-74 through 10-80 of the Voyager 9.1.1 System Administration User's Guide for more information about System > Owning Libraries.

An Owning Library provides an additional security mechanism for cataloging. You cannot change another owning library's bibliographic records without security access. Owning Libraries do not impact searches in either the staff clients or the OPAC.

- **Centralized cataloging** -- If your institution has a main library, a music library, a medical library, and a law library, but all cataloging is centralized, you could designate a single *Owning Library* for all Storage Locations, and a single cataloging HAPPENING Location.
- **Decentralized cataloging** -- If your institution has a main library, a music library, a medical library, and a law library, but cataloging is done separately by each library, you could designate four separate owning libraries with the appropriate Storage Locations identified for each *Owning Library*, and a cataloging HAPPENING Location for each owning library.

Owning Libraries cannot be deleted if Locations are attached.

Unless the library designates multiple owning libraries during the initial data conversion to Voyager, when your cataloging data is loaded into the database, all of your records will be owned by the same Owning

Legend:

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

Library. The name of the initial Owing Library will be your institution's 3-letter I-Share Voyager database name. Example Owing Library names: COD, LNC, JKM, MMC.

CARLI recommends that unless the institution requires the additional level of security in cataloging provided through the use of multiple Owing Libraries, that the initial implementation of a single Owing Library per database be retained.

- If the library is retaining a single Owing Library, verify on the Locations tab that all locations have been selected.
- The "NUC Code" associated with an Owing Library can be edited to be the library's three-character OCLC institution code.

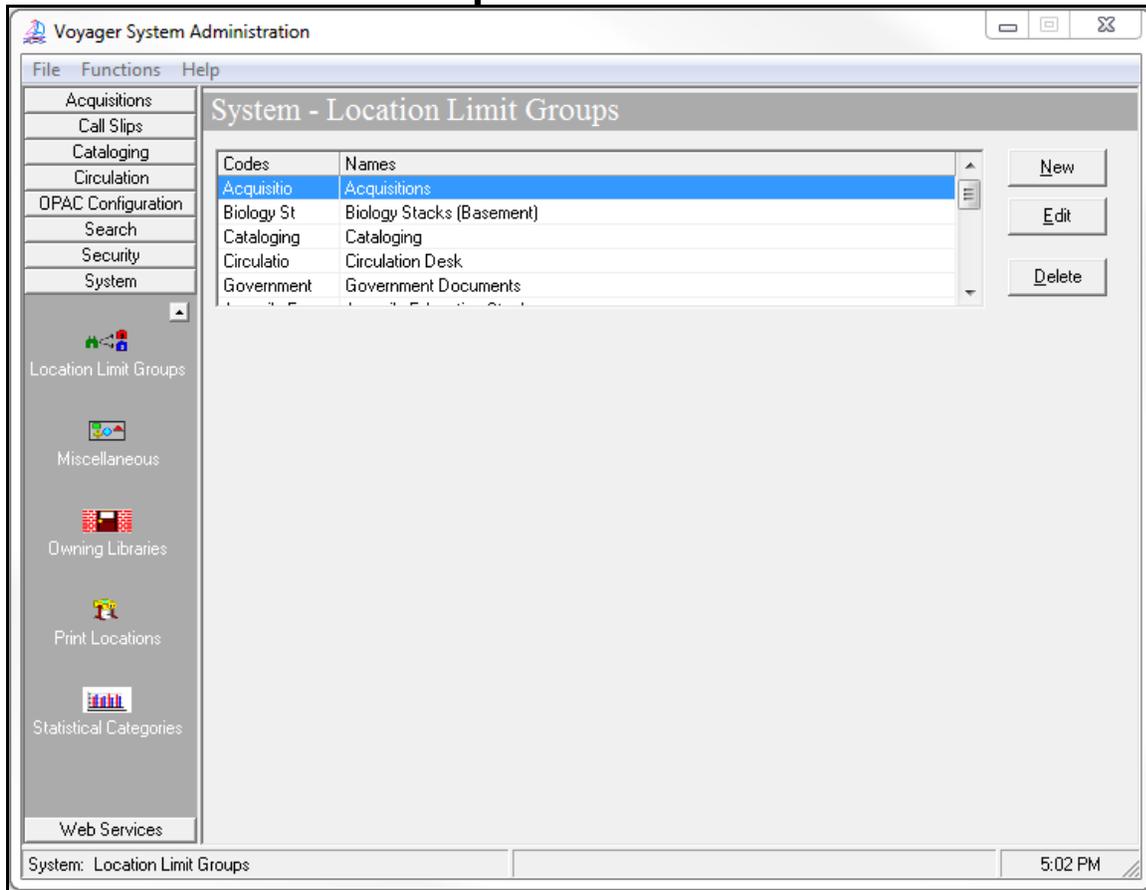
The Voyager 9.1.1 System Administration User's Guide instructions describe how to create a new Owing Library and how to reassign locations to the appropriate Owing Library.

- Reassignment only affects the holdings, it is not retroactive.
- Unless you manually modify each bib record to reflect the correct Owing Library, the bib records and associated holdings will then be owned by separate Owing libraries.'
- In the future, if two Owing Libraries each purchase a copy of a new item, they may each create a new cataloging record for that item; that will cause duplicate bib records in your Voyager database. The duplication, however, will not impact the I-Share Union Catalog or de-duped searches.

Legend:

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

X. Location Limit Groups



System- Location Limit Groups- Overview window

Review pages 10-64 through 10-68 of the Voyager 9.1.1 System Administration User's Guide for more information about System> Location Limit Groups.

For additional information, including a helpful video, review the documentation, *Location Facets in VuFind Local Catalogs*: <https://www.carli.illinois.edu/products-services/i-share/opac/vf-loc-facets>

OPTIONAL: The use of Location Limit Groups within I-Share means the local library's public catalogs (WebVoyage and VuFind) will allow the user to limit search results to Locations narrower than a single I-Share institution.

- Users of the DePaul Law Library, for example, can limit their search results to titles held only in DePaul Law Library locations when they are searching the DePaul catalog.

Libraries can decide what Location Limits might be useful for their institution.

- Each Location Code may correspond to its own Limit, or Codes can be grouped to make a Limit option. Example: DePaul could put each suburban campus as its own Limit, or put all suburban campuses into one Limit, called "Suburban Libraries."

There are no restrictions on the number of Location Limit groups.

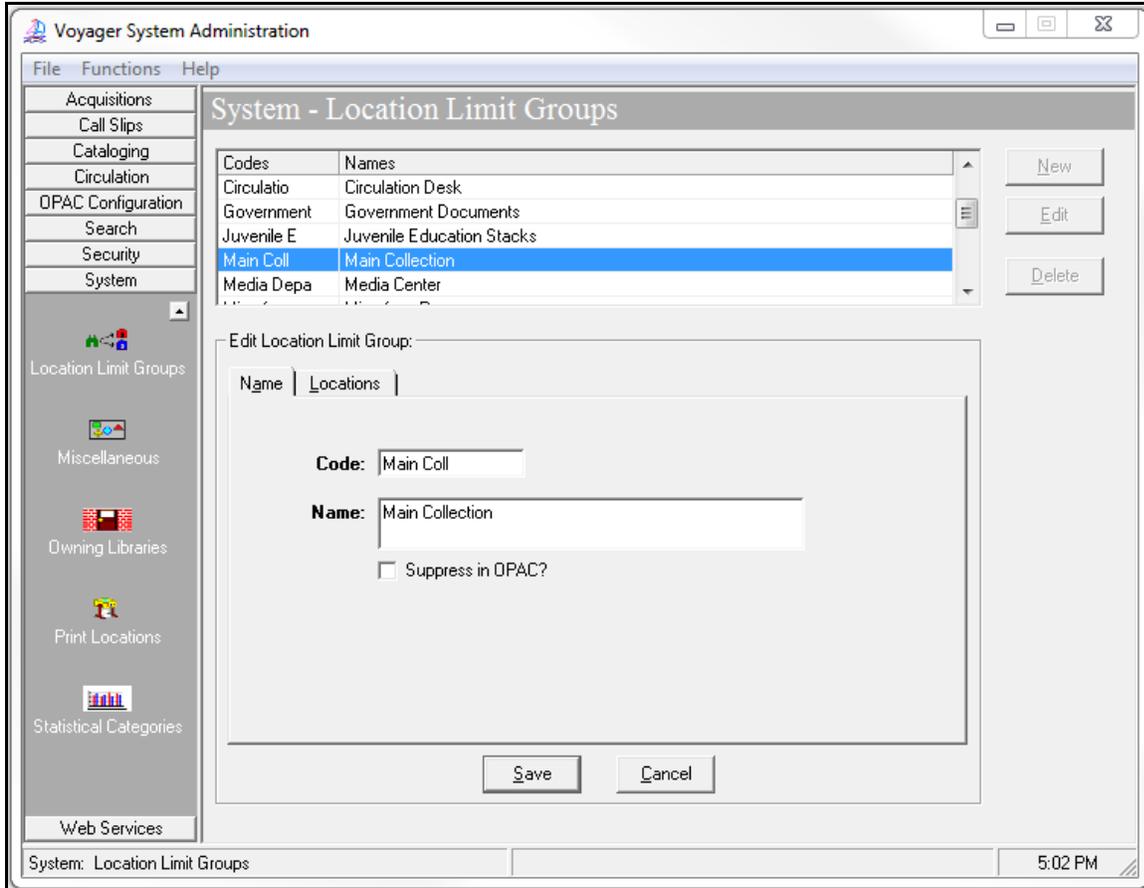
Legend:

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

In Voyager SysAdmin> System> Location Limit Groups

- To Add a new Location Limit Group, click [New].
- To Edit an existing Location Limit Group, highlight the name and click [Edit].
- To Delete a Location Limit Group, highlight the name and click [Delete].

A. Name Tab



System- Location Limit Groups- Name Tab

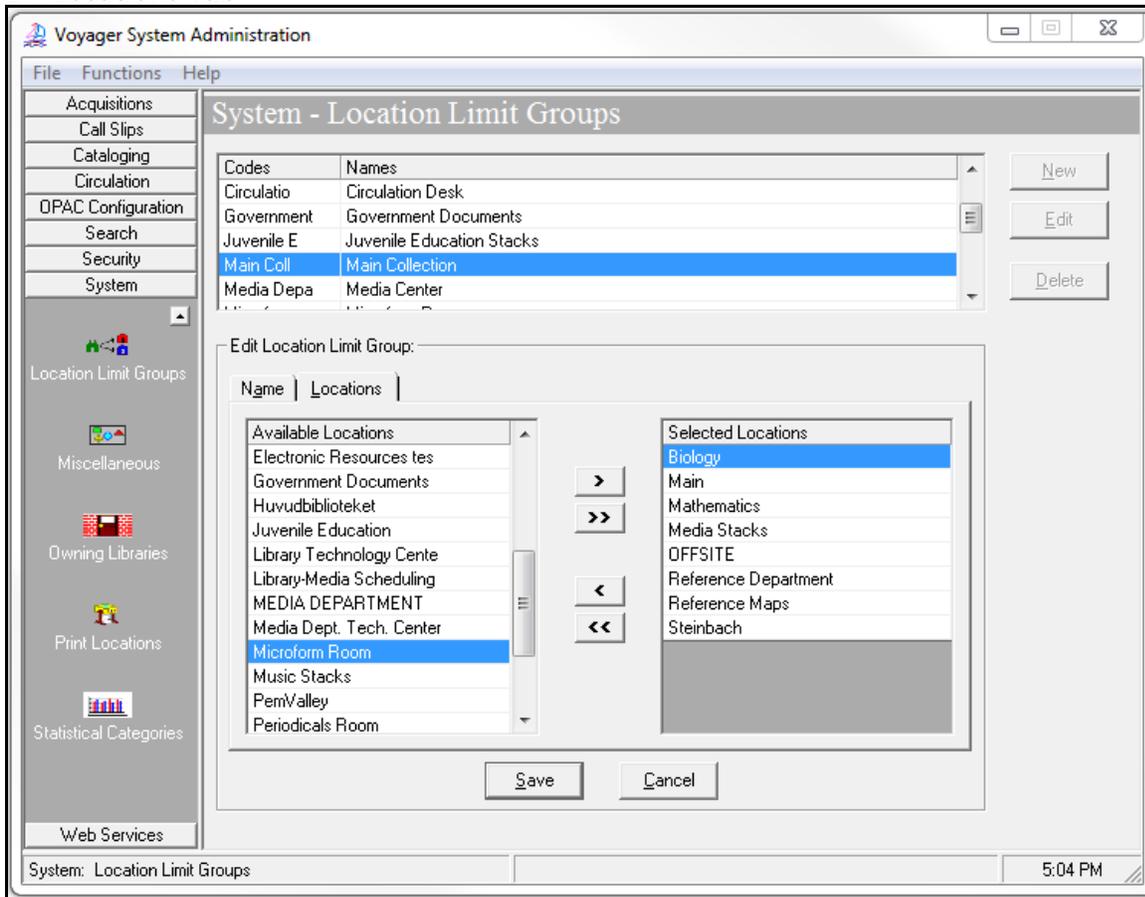
Description:

<i>Location Limit Code:</i>	Each Location Limit Group must have a code. <ul style="list-style-type: none"> • Required, up to 10 characters.
<i>Location Limit Name:</i>	The Location Limit Name is what displays to the public in the OPAC. <ul style="list-style-type: none"> • Required, up to 60 characters.
<i>Suppress in OPAC:</i>	[Optional] Clicking this checkbox suppresses the Location Limit in WebVoyage and VuFind. The Location will not be suppressed from staff clients.

Legend:

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

B. Locations Tab



System- Location Limit Groups- Locations Tab

For each group, go to the Locations tab and select which Locations will be included in that search group.

- For example a Limit group called "Main Collection" may have as its selected Locations: Main, Media Stacks, Microform Room and Government Documents.

A location can belong to more than one Location Limit Group.

XI. Access Control Groups

Review pages 10-2 through 10-12 of the Voyager 9.1.1 System Administration User's Guide for more information about System > Access Control Groups.

OPTIONAL: Access Control Groups provide a way to control access to non-public databases via Voyager staff clients and WebVoyage. Access Control Groups are also used in conjunction with Holding Sort Groups. Access Control Groups are entirely optional; presently no I-Share libraries uses Access Control Groups.

- A new Voyager database contains the following access control groups by default: FACULTY, GUEST, STAFF, STUDENT.

Legend:

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

XII. Base Currency

The screenshot shows the 'System - Base Currency' dialog box in the Voyager System Administration application. The dialog has a title bar with 'Voyager System Administration' and standard window controls. Below the title bar is a menu bar with 'File', 'Functions', and 'Help'. A vertical sidebar on the left contains icons and labels for various system functions: Acquisitions, Call Slips, Cataloging, Circulation, OPAC Configuration, Search, Security, System, Access Control Groups, Base Currency (highlighted), Default Address, Events, Fines/Fees, and Web Services. The main area of the dialog is titled 'System - Base Currency' and contains an 'Edit Base Currency:' section with the following fields: 'Country Name' (United States), 'Currency Name' (U.S. Dollar), 'Currency Code' (USD), 'Base Decimals' (2), and 'Decimal Delimiter' (.). At the bottom of the dialog are 'Save' and 'Cancel' buttons. The status bar at the bottom of the window shows 'System: Base Currency' and the time '5:04 PM'.

System- Base Currency

Review pages 10-12 through 10-14 of the Voyager 9.1.1 System Administration User's Guide for more information about System > Base Currency.

The Base Currency

- determines the currency used in your fund records.
- is the currency to which all foreign currencies entered in purchase orders and invoices are converted before postings are made to your fund records.
- is the currency for reflecting item prices in the system.
- is the currency used for patrons' fines/fees and payments.

⊕ Enter these values:

Country Name: United States

Currency Name: U.S. Dollar

Currency Code: USD

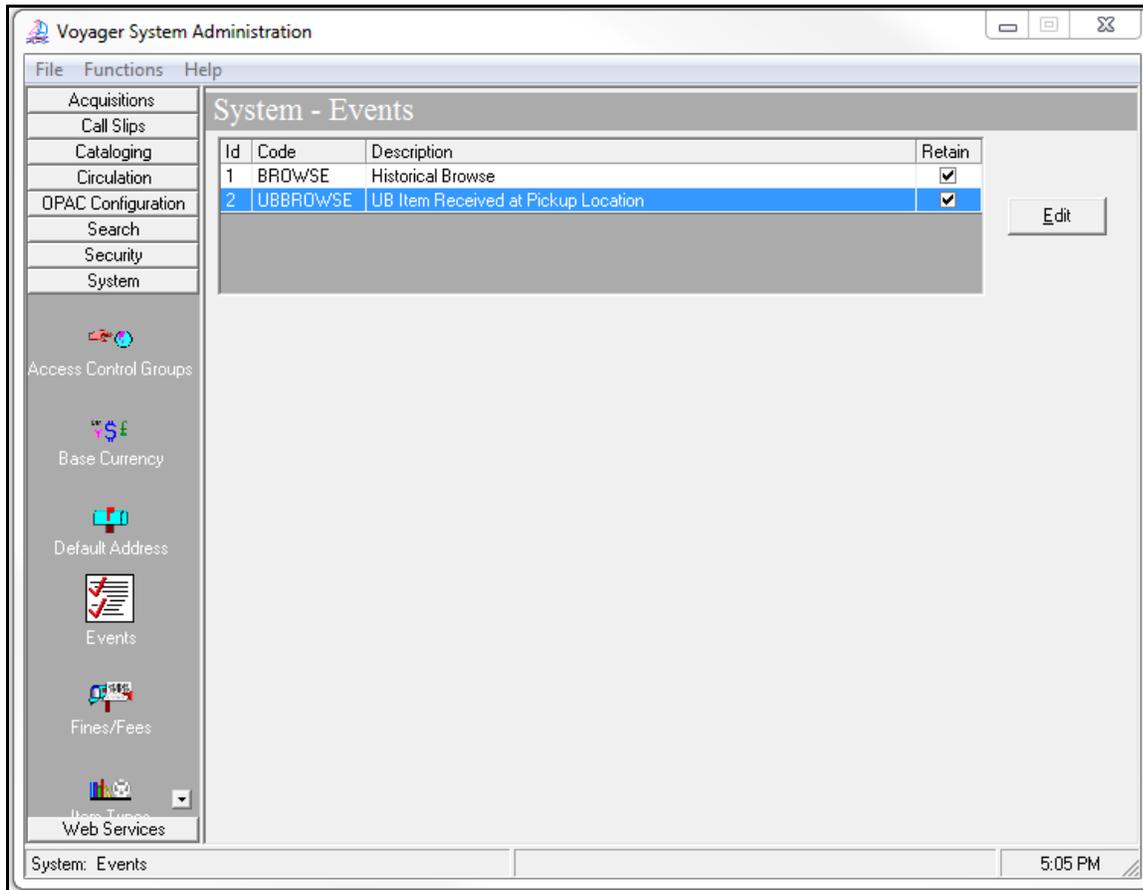
Base Decimals: 2

Decimal Delimiter: period (.)

Legend:

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

XIII. Events



System- Events

Review pages 10-20 through 10-22 of the Voyager 9.1.1 System Administration User's Guide for more information about System> Events.

When you enable BROWSE and/or UBBROWSE, Voyager records additional data that can enhance your reporting statistics on patron browse activity locally and via UB transactions.

CARLI recommends that you enable the recording of both browse types, BROWSE and UBBROWSE.

To enable the retention of Browse statistics:

1. Select the System> Events type and click the [Edit] button.
2. Check the "Retain Event" checkbox.
3. Click Save.

Legend:

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