

Helpful Hints for Voyager System Administration

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May 13, 2010



Session Goals

- Provide the new Voyager System Administrator with guidelines for adding/updating SysAdmin.
- Give the experienced Voyager System Administrator a “checklist” of SysAdmin steps for additions/changes which are done infrequently.



Session Topics

- Adding a New Location
- Location Limit Groups
- Changing Default Address
- New Patron Group
- Bulk Import Rules
- Fiscal Period Close



Adding a New Location

- Creating a new location in System Administration is only the beginning.
- Once the location is created, it must be moved to the “Selected” locations list in each module where it will be used.
- Missing one step can cause a “meltdown” in that module.
- Use a checklist to make sure nothing is missed.

**See Voyager® 7.1 System Administration User's Guide pg. 10-38*

New Location Steps

- Go to: System Administration ➤ System ➤ Locations
 - New
 - **Code***
 - **Name***
 - Spine Label Name
 - OPAC Display Name
 - **Owning Library*** □ Suppress in OPAC
 - ◆ Policies are grayed out until added to “Selected Locations” in Acquisitions, Cataloging, and Circulation policies.

*Required fields

(Hint: Enter an address for Circulation happening locations unless you want the Default Address to print on notices.)



Add Location to Security

- Add the new location to all security profiles that will be working with it.
- Start with Master Profiles.
- Locations can be added to multiple Security Profiles.
 - Can add 2 circulation happening locations to a security group to give a staff member the ability to work at 2 circ desks.

(Hint: A new location must be added to your Master Profile before it will appear under “available” locations for circulation policy definitions.)



Add Location to Policy Definitions

□ Policy Definitions

- A location is “available” to only one policy group per module.
- Once it is moved to “selected” locations it will not appear as “available” under other policy groups for that module.
- Make a location a “happening location” by checking the appropriate actions.

□ Add to a ledger in Acquisitions client.

(Hint: If someone reports they can no longer access a ledger, the new location may be missing from their Acquisition/Serials Security group profile.)



Happening Locations

The screenshot displays the Voyager System Administration interface. The main window is titled "Circulation - Policy Definitions". A "Location Settings" dialog box is open in the foreground. The dialog box contains the following fields and options:

- Default Location:
- Default Item Type:
- Default Print Location:
- Automated Storage
- Circulation Location
 - Collect Fines
 - Due Date Slip Print
 - Discharge Receipt Print
 - Courtesy Discharge
 - Hold Slip Print
 - Payment Receipt Print
 - Routing Slip Print
 - Pick Up Location
 - OPAC Suppress for Item on the Fly
- Shelving Interval:
- In Transit Interval:

Buttons at the bottom of the dialog box include "OK", "Cancel", and "Settings...".

(Hint: Print Locations must be established in SysAdmin>System>Print Locations before they will show in the "Default Print Location" drop down box.)

Print Locations

The screenshot shows the 'System - Print Locations' window in Voyager System Administration. The window has a menu bar with 'File', 'Functions', and 'Help'. On the left is a navigation pane with icons and labels for 'Acquisitions', 'Call Slips', 'Cataloging', 'Circulation', 'OPAC Configuration', 'Search', 'Security', 'System', 'Locations', 'Location Limit Groups', 'Miscellaneous', 'Owning Libraries', and 'Print Locations'. The main area contains a table of print locations and a form for adding a new one.

Default	Codes	Names
<input type="checkbox"/>	ACQ	Materials Acquisition
<input type="checkbox"/>	CAT	Cataloging
<input checked="" type="checkbox"/>	CIRC	Main Circulation Desk

New Print Location:

Code:

Name:

Default Print Location for:

- Default
- Cataloging
- Acquisitions
- Circulation
- Media Scheduling

Buttons: New, Edit, Delete, Save, Cancel

System: Print Locations | 10:56 AM

(Hint: Voyager Reporter uses the Print Locations definitions for print jobs for that module.)

Location Limit Groups

- A Location Limit Group provides a way to limit WebVoyage® searching to a specific group of locations.
- Go to System Administration ➤ System ➤ Location Limit Groups ➤ New
 - Code:
 - Name:
 - ◆ Suppress in OPAC?

(Hint: The “Name” goes after LOCA= in the limits.ini file for the Classic WebVoyage®)

Location Limit Groups

- Checking the “Suppress in OPAC?” option suppresses this limit in WebVoyage® but not in the staff modules.
- Choose the Locations tab.
- Move the desired locations from “Available Locations” to “Selected Locations” and save the new limit group.

(Hint: Unless “Suppressed in Opac” is checked, the new limit will show up immediately under Advanced Search Location Limit, but not in the Quick Limit for Basic Search.)



Location Limit Groups

The screenshot shows the Voyager System Administration interface. The main window is titled "System - Location Limit Groups". It features a menu bar with "File", "Functions", and "Help". A sidebar on the left contains various system management options, with "Location Limit Groups" selected. The main area displays a table of location limit groups:

Codes	Names
ELEC	E-Journal Collection
elenet	E-Book Collection
ILL	ILL
juvenile	Juvenile Collection
LEISURE	Leisure
..	..

Buttons for "New", "Edit", and "Delete" are located to the right of the table. Below the table is an "Edit Location Limit Group:" dialog box. The dialog has two tabs: "Name" and "Locations". The "Locations" tab is active, showing two lists: "Available Locations" and "Selected Locations".

Available Locations:

- Docs Microfilm
- Docs Non Circulating
- Docs Non-Circ Backlog
- Docs Online
- Docs Periodicals
- Docs Reference Desk
- E-Book--Career Collectio
- Ebscohost
- Electronic Dissertations
- Electronic Reserves
- Exhibit Case 3rd Floor
- Exhibit Case 4th Floor

Selected Locations:

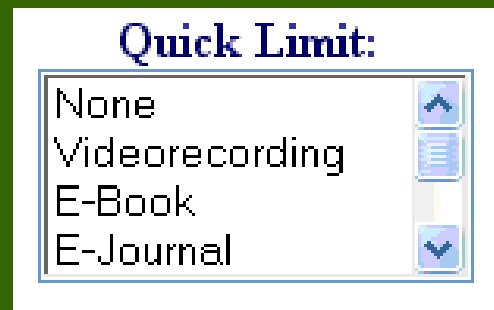
- eBrary Books
- Electronic Books
- Internet CogNet Database
- Internet NetLibrary
- Internet Safari Books

Navigation buttons (>, >>, <, <<) are between the lists. "Save" and "Cancel" buttons are at the bottom of the dialog. The status bar at the bottom shows "System: Location Limit Groups" and the time "11:19 AM".

(Hint: Remember to add a new location to any location limit group(s) already established.)

Add New Limit Group to WebVoyage®

- Location Limit Groups appear under the Classic WebVoyage® Quick Limits box.
- Their control is entered in the limits.ini file */m1/voyager/xxxdb/etc/webvoyage/local*.
- Add to the [Simple_Limits] stanza at the bottom of this file.



*See Voyager® 6.5 WebVoyage® User's Guide pg. 6-101

Sample [Simple_Limits] Stanza

[Simple_Limits]

None=None

Counter=8

1=DVD/Videos

2=Leisure Books

3=eBooks

4=Journals

5=Juvenile Collection

6=Career Collection

[DVD/Video]

1=LOCA=DVD/Video

[Leisure Books]

1=LOCA=Leisure Books

[E-Book]

1=LOCA=E-Book Collection

[Journals]

1=LOCA=Journals

[Juvenile Collection]

1=LOCA=Juvenile Collection

[Career Collection]

1=LOCA=Career Center Collection

(Hint: The names in the numbered list under [Simple_Limits] display in the Quick Limit drop-down list in WebVoyage®)

Voyager 7 New WebVoyage

- Location Limits Groups in SysAdmin controls available locations to limit
- The Limit to: dropdown on the Basic Search screen is defined in the webvoyage.properties file
- File is case sensitive.

**See Voyager® 7.1 System Administration User's Guide pg. 10-64*



Limit To:

page.search.limitTo.selected=none

page.search.limitTo.none=

page.search.limitTo.none.limit=none

page.search.limitTo.none.order=1

page.search.limitTo.none.text=All Material

page.search.limitTo.Videos=

page.search.limitTo.Videos.limit=LOCA=DVD/Video

page.search.limitTo.Videos.order=2

page.search.limitTo.Videos.text=DVD/Videos

Hint: *Make sure to type new entries **EXACTLY** as those already in the file. Each entry must have these 4 lines.*



Changing Default Address

- Go to System Administration ➤ System ➤ Default Address
- The “Library Name” is the Database Name: in WebVoyage® when a user selects Local Catalog.
- The default address is used for locations without one. Add an address to locations that will be different from the default one.
 - Define an address for an individual location under the address tab of System ➤ Locations.
 - The return address on overdue notices comes from circulation “happening” locations.

(Hint: Only an operator whose security is in a Master Profile with the System-Wide Configuration box checked in their Profile Values can change the default address.)



Adding a Location Address

System Address

Address1 | Address2 | Address3 | Address4 | Address5 | Address6

Contact Name:

E-mail:

Address:

City:

St/Province: Zip/Postal Code:

Country: SAN:

Address Type

Ship To
 Bill To
 Street
 Campus
 Circ Desk
 Other

Phone Numbers

Type	Number

(Hint: Each location can have up to six addresses, but if they are all the same as the default address there is no need to enter any address for a location.)

Establishing a New Patron Group

- Go to System Administration ➤ Circulation
 - Patron Groups ➤ New
 - **Code:**
 - **Name:**
 - Display Name: (Displays in Webvoyage®)
 - Display OPAC Messages for charged Items
 - ◆ This is used for Status Patron Groups.
 - ◆ The message displayed comes from the opac.ini in Classic WebVoyage. (See *Webvoyage® User's Guide* 6.5, pg. 9-53)

(Hint: Status Patron Groups display messages for special checkout purposes, such as, Sent to the bindery, etc.)

Add to Circulation Policy Definitions

- Appears in “Available Patron Groups” under
 - Access Control Groups
 - Circulation Policy Definitions
 - ◆ Patrons tab, Matrix tab, and Short Loan Matrix tab
- Go to the Patrons tab
 - Highlight the New Patron Group
 - Click on Rules
 - Choose Patron Rules for this group

(Hint: A Patron Group can be associated with more than one Circulation Policy Definition.)



Adding Patrons

- Before a patron is added to the new group add the group to:
 - each Circulation ➤ Policy Definition ➤ Patrons ➤ Rules where they will be allowed to borrow
 - the Matrix tab under each Policy Group
- If a Patron Group/Item Type is not entered under the Matrix tab, the default policy [all] will be applied.



Create Circ Matrix

- Open the Matrix tab and click on Add.
- Highlight the new Patron Group and the Item Type.
 - Fill in the Settings.
 - Click on the Intervals Tab and enter those.
 - Continue until all Item Types are set up for this group.

(Hint: Add a Patron Group/Item Type for items that do not circulate and leave the Charge/Renew box unchecked to keep them from circulating under the default (all) policy.)



Bulk Import Rules

□ Rule Name

– Code:

- ◆ used on command line after **–i** parameter when loading a file of records.
- ◆ Mnemonic codes are easier to remember when importing a file.

– Name:

- ◆ Name the rule for its action for ease of use, **MarciveUnconditional** and **MarciveMerge**.

□ Rules

- The type of records to be loaded determines which options are available.
- Choose Copy 852-855... radio button to make **Copy 856 Field from Bib to MFHD** available.

(Hint: Create a Bibliographic Duplicate Detection Profile first.)



Bulk Import Rules

The screenshot displays the 'Voyager System Administration' interface. The main window is titled 'Cataloging - Bulk Import Rules'. On the left is a navigation pane with various system modules. The main area contains a table of existing rules and a configuration panel for editing a rule.

Codes	Names
approval	BLACKWELL
cis	CIS
delete	Delete Bib Records
ebooks	NetLibrary
ebSCO	Ebscohost

Edit Bulk Import Rule:

Rule Name | Rules | Item Type | Mapping | Barcode

Bib Dup Profile: OCLCUnconditional
Auth Dup Profile: OCLCAddConditional
Owning Library: utd
Expected Character Set Mapping of Imported Records: MARC21 MARC-8

Batch Opac Suppress
 Cataloging Review

Load Bib / Auth Only
 Bibs, MFHDs
 Bibs, MFHDs, POs
 Bibs, MFHDs, Items
 Bibs, MFHDs, POs, Items

Create MFHD for existing Bibs
 Copy 852-855, 863-878 Fields From Bib to MFHD
 Copy 856 Field From Bib to MFHD

Loc Field: 949
Loc Subfield: a
Loc Indicator 1: *
Loc Indicator 2: *

Buttons: New, Edit, Delete, Orders..., Save, Cancel

System Status: Cataloging: Bulk Import Rules | 12:04 PM

Bulk Import Rules

- The Orders tab is available only after choosing Bibs, MFHD's, PO's or Bibs, MFHD's, PO's, items.
- Information required in the Orders tab must be provided by those using the Voyager Acquisition module.
- Item Type
 - Enter a bib tag that is not in the bib records to force the default item type into the record.
- Mapping
 - The Item Type and Location will be used from here if not found in the bib record.
- Barcode
 - Lists the bib tag where the barcode is located.



Adding PO During Bulk Import

Cataloging Bulk Import Order Settings

Order Location: Materials Acquisition **Order Type:** Approval

Line Item Type Field: 949 Subfield: x Ind 1: <input type="checkbox"/> Ind 2: <input type="checkbox"/> Default: Approval	Vendor Code: BNA Acct: <input type="text"/> Currency: USD	Fund Field: 949 Subfield: i Ind 1: <input type="checkbox"/> Ind 2: <input type="checkbox"/> Default Code: APP05
Price Field: 980 Subfield: e Ind 1: <input type="checkbox"/> Ind 2: <input type="checkbox"/> Default: <input type="text"/> \$0.00	Copy Field: 949 Subfield: i Ind 1: <input type="checkbox"/> Ind 2: <input type="checkbox"/> Default: 1	Notes Field: <input type="text"/> Subfield: <input type="checkbox"/> Ind 1: <input type="checkbox"/> Ind 2: <input type="checkbox"/>
Instructions Field: <input type="text"/> Subfield: <input type="checkbox"/> Ind 1: <input type="checkbox"/> Ind 2: <input type="checkbox"/>	Vendor Title Field: <input type="text"/> Subfield: <input type="checkbox"/> Ind 1: <input type="checkbox"/> Ind 2: <input type="checkbox"/>	Piece Id Field: <input type="text"/> Subfield: <input type="checkbox"/> Ind 1: <input type="checkbox"/> Ind 2: <input type="checkbox"/>

(Hint: Remember to change the Fund Default Code here after running Fiscal Period Close.)

Preparing for Fiscal Period Close

- Define the next Fiscal Period in System Administration
 - The Fiscal Period name appears in the dropdown box when creating a ledger in Voyager Acquisitions
- Identify open orders
 - Run Open Order Report on server and print from Reporter
- Determining why an order remains Open helps to establish Roll Over Rules
 - See Table 16-1, *Voyager® 7 Acquisitions User's Guide*, p. 16-5.
- Run the Fund Snapshot Report and review before running FPC.
- Not all “Open Orders” roll over.

(Hint: Fiscal periods can overlap allowing orders to be entered before the old FY ends and paying for orders that arrive after the new FY starts.)



Restrict Acquisitions Access

- If running Solaris 10, disabling Acquisitions from the server side creates a problem on restart.
- Two Choices:
 - Change Security in Sys Admin to view only until FPC completes and roll over is reviewed.
 - Copy and remove users under each Acquisitions Security Profile



Questions?

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