



# **Voyager<sup>®</sup> 10.0**

## **Circulation User's Guide**

May 2017

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# Contents

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## About This Document

• Purpose	xix
• Intended Audience	xix
• Reason for Reissue	xix
• Document Summary	xx
• Conventions Used in This Document	xxi
• Document Reproduction/Photocopying	xxii
• Comment on This Document	xxiii

---

## 1 Getting Started

• Introduction	1-1
• Prerequisite Skills and Knowledge	1-1
• Before You Begin	1-1
• Installing the Circulation Client	1-2
• Logging in to the Circulation Module	1-2
Selecting a Location	1-3
Single Client Login	1-5
Viewing Login Information	1-5
Closing a Circulation Function	1-6
Exiting Circulation	1-6
• Configuring the voyager.ini file for Charge time-out	1-6
The Time-out Timer	1-7
ChargeTimeout Key	1-7
• E-mailing Patrons from the Circulation module	1-8
Creating the Mailto URL	1-9

---

## 2 Overview of the Circulation Process

• Introduction	2-1
• Purpose of this Chapter	2-1

## Contents

• Overview of the Circulation Process	2-2
• Terms Used in Circulation	2-4
Patron and Patron Group	2-4
Item and Item Type	2-4
Circulation Policy Group	2-4
Circulation Policy Matrix	2-4
Circulation Cluster	2-5
Home Circulation Cluster	2-5
Parent Patron Record	2-5
• The Circulation Workspace	2-5

---

## 3 Searching in the Circulation Module

• Introduction	3-1
• Purpose of this Chapter	3-1
• Searching for a Patron Record	3-2
• Searching for a Patron from the Patron Workspace	3-2
• Searching for a Patron from the Charge Workspace	3-8
Multiple Patrons Match the Search Criteria	3-9
• Searching for an Item	3-11
• Searching for an Item by Barcode	3-11
• Searching for an Item Using Keyword, Headings/Index Selection, and Builder Searches	3-15
• Search Dialog Box	3-15
Keyword Tab and Keyword Searching	3-16
Command Line Searching	3-19
Other Keyword Search Considerations/Options	3-20
Index Selection Tab	3-20
Find and Browse Searches	3-25
Heading Searches by Call Number	3-26
Headings Keyword Searches	3-26
Builder Tab and Builder Searching	3-27
History Tab	3-31
• Titles Index Dialog Box	3-31
Search Results List Re-Sort Options	3-33
Re-Sort Configuration Options	3-35
Considerations for Re-sorting Search Results	3-36
• Holdings Index Dialog Box	3-37
• Headings List Dialog Box	3-39

## Contents

Reference Information Dialog Box	3-42
Scope Notes	3-44
Narrower Term	3-44
See Also	3-45
Select one or more authority records Dialog Box	3-46
• Perform a Keyword Search	3-47
• Perform an Index Selection Search	3-49
• Perform a Builder Search	3-52
• Access/Review the History Tab	3-54
• User-Defined Alternate Search Button	3-55
• Setting Search Preferences	3-56
Retain Last Search	3-56
Automatic Truncation for Index Selection Searches	3-56
• Search Limits	3-56
Search Limits Dialog Box	3-57
Limits.ini File	3-59
Limits Stanza	3-60
Search Limits Stanzas	3-60
Limiting a Search	3-67
• MFHD-Bibliographic Combined Keyword Search (optional feature)	3-70
Setup	3-72
Search Options	3-73
Search Results Display	3-73
User Considerations	3-73
• Searching in Circulation Examples	3-74
Keyword Searching in the Circulation Module	3-74
Index Selection Searching in the Circulation Module	3-80
Builder Searching in the Circulation Module	3-84
• Searches Available from the Item Menu	3-86
Multiple Items Match the Search Criteria	3-87
Multiple Holdings Display	3-88
Multiple Items Display	3-89

## 4

### Patron Records

• Introduction	4-1
• Purpose of This Chapter	4-1
• The Patron Record	4-2

## Contents

Patron Record Buttons	4-4
E-mail Control Button	4-4
Charged Items Index	4-5
Patron Fines/Fees	4-6
Patron Request Information	4-7
Notes	4-8
Counters	4-10
Statistics	4-11
Patron Record Tabs	4-11
Patron ID Tab	4-11
Details Tab	4-12
Address/Phone Tab	4-14
Counters tab	4-15
Proxy Patrons Tab	4-16
History Tab	4-17
• Creating a Patron Record	4-19
Security	4-20
Name Tab	4-20
Details Tab	4-22
Barcode Tab	4-24
Address Tab	4-25
Phone Tab	4-27
Error and Warning Messages	4-39
• Editing a Patron Record	4-41
Security	4-41
Name Tab	4-41
Details Tab	4-43
Barcode Tab	4-45
Barcode Status Error Messages	4-47
Address Tab	4-48
Phone Tab	4-51
• Copying Barcodes from the Patron Record	4-54
• Adding Multiples Barcodes, Addresses, and Phone Numbers to a Patron Record	4-54
Address Types	4-55
• How Voyager Chooses a Patron Address for a Circulation Notice	4-55
Example of Selecting an Address for a Notice	4-57
• Deleting Information from the Patron Record	4-62
Security	4-63
• Deleting Patron Records	4-66

## Contents

• Duplicating Patron Records	4-69
• Adding or Changing PINs in the Circulation Module	4-70
Security	4-71
Change Patron PIN Dialog Box	4-71
• Charged Items Index	4-74
Security	4-74
Charged Items Index Dialog Box	4-74
• Patron Fines/Fees	4-86
Fines, Fees and Demerits for Location	4-91
Adding Fines/Fees	4-92
Security	4-92
Add Fine/Fee Dialog Box	4-92
Adding a Fine/Fee from the Charge Workspace	4-96
Modifying Fines/Fees	4-97
Posting Against Fines/Fees	4-99
Security	4-99
Post Against Fine/Fee	4-99
Printing Fines/Fees	4-104
Bursar Transfer System	4-105
• Patron Request Information	4-106
Security	4-108
Holds and Recalls Tab	4-108
Patron Call Slips	4-115
Patron Short Loans	4-121
• Patron Notes	4-126
Security	4-127
Notes Dialog Box	4-127
Adding a Note to a Patron Record	4-130
Deleting a Note from a Patron Record	4-132
• Setting Patron Counters	4-134
Security	4-134
Set Patron Counters Dialog Box	4-134
• Patron Statistical Information	4-139
Security	4-140
Patron Statistical Categories Dialog Box	4-140
• Creating Proxy Patrons	4-145
Security	4-146
Proxy Patron Maintenance Dialog Box	4-147
Updating Proxy Patrons	4-152
Deleting Proxy Patrons	4-153

## Contents

- Clearing Patron Display 4-154
- E-mailing from the Circulation Module 4-154
  - E-mailing from the Patron Record 4-155
  - E-mailing from the Charge Workspace 4-156
  - E-mailing from the Charged To Dialog Box of a Charged Item 4-158
  - E-mailing from the Charged to Dialog Box of a Charged Reserve Item 4-159

---

## 5 Item Records

- Introduction 5-1
- Purpose of This Chapter 5-1
- The Item Record 5-2
  - Sorting Items by Column Headings 5-4
  - Bib Brief Tab 5-5
  - Holdings Tab 5-6
  - Item/Holdings Tab 5-7
  - Item Details Tab 5-8
  - Item History Tab 5-9
  - Charged To Dialog Box 5-11
  - Notes Dialog Box 5-12
  - Item Statistical Categories Dialog Box 5-15
  - Item Status Dialog Box 5-19
    - List of Possible Item Statuses 5-20
  - Assigning a New Barcode to an Item Record 5-26
- Copying Barcodes from the Item Record 5-29
- Viewing an Item's Circulation History 5-30
- Viewing an Item's Outstanding Fines 5-34
- Adding Bibliographic, Holdings, and Item Records 5-37
  - Security 5-37
  - Add Bib/Item Dialog Box 5-38
    - Circbib.cfg file - Customizing the Bib Tab Fields 5-39
    - Bib Tab 5-47
    - Holdings Tab 5-50
    - Item Tab 5-51
- Adding, Editing, and Deleting Item Records 5-55
  - Security 5-55
  - Add Item Dialog Box 5-56
  - Editing an Existing Item Record 5-64



## Contents

Deleting an Item Record	5-66
Resequencing Item Records	5-67
Viewing the MARC Bibliographic Record	5-71
• Http POST request - Sending the MARC Record to a Web Server	5-74
Viewing MARC Holdings	5-75
• Requests in the Circulation Module	5-77
Holds	5-77
Recalls	5-77
Call Slip Request	5-78
Remote Storage Request	5-78
Short Loan Request	5-79
Security	5-79
Place Request Dialog Box	5-79
Blocked Requests	5-83
• Maintaining Item Requests	5-86
Security	5-86
Request Maintenance Dialog Box	5-86
• OPAC Call Slip Messages	5-98

## 6

### Charge and Renew Function

• Introduction	6-1
• Purpose of this Chapter	6-3
• Security	6-3
• The Charge Workspace	6-4
Patron Search	6-7
Item Search	6-7
• Charging Items	6-8
• Renewing Items	6-11
• Charging Items using a Proxy Patron	6-14
• Modifying Due Dates	6-18
Security	6-18
• Pasting Barcodes into the Charge Workspace	6-20
• Additional Activities from the Charge Workspace	6-21
Clear Display	6-21
Beep on Charge	6-21
Viewing Charged Item Information	6-21
Adding a New Patron Record	6-22

## Contents

Adding New Bib Information to an Item	6-23
Viewing Patron Request Information	6-24
• Alerts at Charge	6-25
• Offline Charge	6-25
Charging in Offline Circulation	6-28
Uploading the Offline Capture File	6-30

---

## 7

### Discharge Function

• Introduction	7-1
• Purpose of This Chapter	7-1
• Security	7-2
• The Discharge Workspace	7-2
Item Search	7-4
Activities at Discharge	7-6
• Backdating Due Dates	7-6
Security	7-7
• Collecting Fines	7-10
Security	7-10
• Removing Item Statuses	7-13
Security	7-13
• Processing Returned Lost Item Refunds	7-15
Security	7-15
• Clearing Your Display	7-18
• Prompting Fines/Printing Discharge Slips	7-18
• Pasting Barcodes into the Discharge Workspace	7-19
• Alerts at Discharge	7-19
• On-Line Tracking of In-Transit Items	7-20
In-Transit Details Dialog Box	7-21
Exceptions in Item Tracking	7-23
Tracking an In-Transit Item	7-23
• Accessing the Patron's Record at Discharge	7-26
• Setting a Beep on Discharge	7-30

---

## 8

### Course Reserve

• Introduction	8-1
----------------	-----

## Contents

• Purpose of This Chapter	8-2
• Security	8-2
• Reserve Workspace	8-3
Reserve List Header Section	8-4
Items and E-Items Tabs	8-5
Linked Courses Section	8-7
• Creating Reserve Lists	8-7
Editing the Reserve List Header	8-11
• Searching for a Course Reserve List	8-12
Searching for a Course Reserve List from an Open List	8-18
Displaying a Search Index	8-20
• Adding Items to a Reserve List: Physical Items	8-21
Adding Additional Items	8-30
Creating and Adding a Bib / Item “On-the-fly”	8-30
Copying Physical Items from Another List	8-32
• Removing Physical Items from a Reserve List	8-33
• Changing Physical Item Types and Locations	8-34
• Placing Items On Reserve (Reserving Items)	8-36
• Unreserving Items	8-38
• Adding Items to a Reserve List: E-Items	8-39
Adding New E-Items to a Reserve List	8-40
Removing E-Items from a Reserve List	8-50
• Deleting E-Items	8-51
• Linking Reserve Lists to Course Information	8-52
The Dept/Inst/Course/Section Dialog Boxes	8-53
Department Section	8-53
Instructor Section	8-54
Course Section	8-55
Section Section	8-56
Adding Course Information	8-60
Editing Course Information	8-63
Deleting Course Information	8-64
• Deleting a Reserve List	8-66
• Viewing Course Reserve History	8-67
• Printing a Reserve Pick List	8-69
• Course Reserve Batch Jobs	8-70

## Contents

---

<b>9</b>	<b>Patron and Item Blocks</b>	
	• Introduction	9-1
	• Purpose of This Chapter	9-1
	• Patron Blocks	9-2
	• Item Blocks	9-3
	• Security	9-3
	• Block Condition Summary	9-5
	• Overriding Blocks	9-14
	• Patron Blocks	9-15
	Override of Patron Blocks	9-15
	Supervisor Override of Patron Blocks	9-16
	• Item Blocks	9-18
	Comment Field Alert	9-18
	Overriding Item Blocks	9-19
	Supervisor Override of Item Blocks	9-21
<b>10</b>	<b>Short Loans</b>	
	• Introduction	10-1
	• Purpose of This Chapter	10-1
	• Short Loan Configuration	10-1
	Minimum System Administration Configuration	10-2
	Additional System Administration Configuration Considerations	10-3
	Short Loan Location	10-3
	Short Loan Circulation Happening Location	10-4
	Short Loan Print Location	10-4
	Short Loan Item Type	10-4
	Making an Item Short Loanable	10-5
	Short Loan Desk Calendar	10-5
	Short Loan Circulation Policy	10-5
	Other Short Loan Related Settings in the System Administration	
	Module	10-7
	Short Loan Request Form	10-8
	• Circulation Batch Job 27 - Archive Short Loans	10-8
	• Placing a Short Loan Request	10-9
	• Short Loan Maintenance	10-16
	• Viewing Short Loans - The Short Loan Search List	10-19

---

## Contents

- Charging a Short Loan 10-24

---

### 11

#### Item Distribution

- Introduction 11-1
- Purpose of This Chapter 11-1
- Security 11-2
- Item Distribution Workspace 11-2
- Searching and Viewing Items for Distribution 11-4
- Distributing Items Through the Charge Workspace 11-6
- Distributing Items Through the Item Distribution Workspace 11-7
- Completing the Item Distribution Inventory Dialog Box 11-12
  - Updating Inventory Information 11-23
- Automatically Ordering Distributable Items 11-25
- Deleting a Distributable Item 11-26
- Viewing Distributed Items 11-27
  - Item's Distribution History 11-29
- Printing a Distributable Item List 11-30

---

### 12

#### SMS Messaging

- Introduction 12-1
- Implementation 12-2
- SMS Gateway/Service Providers 12-3
- Ex Libris SMS Proxy 12-4
- Voyager Setup/Configuration 12-4
  - Circulation Notices 12-5
  - webvoyage.properties 12-6
  - voyager.env 12-7
  - SmsProxyConf.xml 12-7
  - Pcircjob/Pmediajob 12-9
- Patron SMS Number 12-9
- SMS Send Status Log 12-11

## Contents

---

<b>13</b>	<b>Session Preferences</b>	
	• Overview	13-1
	• Alerts, Printing, and Fines/Fees/Demerits	13-2
	Printing	13-6
	• Items and Searching Tab	13-7

---

<b>14</b>	<b>Circulation Menus</b>	
	• Introduction	14-1
	• Purpose of This Chapter	14-1
	• Keyboard Equivalents For Selecting Options	14-2
	• Keyboard Equivalents for Entering Information	14-2
	• Circulation Windows Functions	14-2
	• Circulation Editing Functions	14-3
	• Circulation Main Menu	14-3
	File Menu (Alt + f)	14-4
	Functions Menu (Alt + u)	14-4
	Options Menu (Alt + o)	14-6
	Help Menu (Alt + h)	14-7
	Charge/Renew Menu (Alt + c)	14-8
	Discharge Menu (Alt + d)	14-10
	Reserve Menu (Alt + r)	14-12
	Patron Menu (Alt + p)	14-15
	Item Menu (Alt + i)	14-17

---

<b>A</b>	<b>Printing Templates</b>	<b>A-1</b>
	• Introduction	A-1
	Customization Information	A-1
	• CIRC.INI	A-3
	Due Date Slip Stanza	A-4
	Due Dates Slips for Specific Patron Groups	A-7
	Due Date Slip Session Stanza	A-7
	Discharge Slip Stanza	A-9
	Hold Slip Stanza	A-11

## Contents

Routing Slip Stanza	A-15
Fine/Fee Payment Receipt Stanza	A-18
Fine/Fees Statement Stanza	A-21
Patron Charged Items Stanza	A-25
Patron Requests (Holds and Recalls) Stanza	A-29
Patron Call Slips Stanza	A-32
Circulation History Stanza	A-34
Reserve Pick List Stanza	A-37
MARC Record Stanza	A-39
Short Loan Info Stanza	A-42
Short Loan Search Stanza	A-45
Item Distribution Stanza	A-49

<b>B</b>	<b>Printing Labels</b>	<b>B-1</b>
	• Introduction	B-1
	Printing Bibliographic Record Information	B-1
	Printing Holdings Record Information	B-2
	Printing Item Record Information	B-2
	• Spine and Piece Label Print Template	B-2
	Templates Stanza	B-3
	Print Options... Stanza	B-3
	Print Template Label/Print Template Piece Stanza	B-4
	Action Codes	B-6
	Initiating and Ending Action Codes	B-6
	Printing Field Information	B-7
	Printing in the Alternate Font	B-7
	Changing Font Size	B-8
	Inserting a Blank Line	B-8
	Inserting a Tab	B-8
	Spine Label Field Codes	B-8
	• Sample Spinelabel.cfg File	B-10
	• Printing Spine and Piece Labels	B-16
	• Changing Printer Settings	B-17

## Contents

---

<b>C</b>	<b>Circulation Self Check</b>	C-1
	• Introduction	C-1
	• Purpose of This Chapter	C-1
	• Setting up Self Check	C-1
	System Administration Settings	C-2
	Creating a New Operator and Location for Self Check	C-2
	• CIRCSC.INI	C-6
	General Stanza	C-6
	Security Stanza	C-9
	Language Stanza (Language List)	C-10
	Specific Language Stanza	C-11
	Due Date Slip Stanza	C-14
	Sample CircSC.ini File	C-16
	• Charging Items with Self Check	C-21
<b>D</b>	<b>Demerits</b>	D-1
	• Introduction	D-1
	• Purpose of This Chapter	D-2
	• Demerits	D-2
	Definition of Terms	D-2
	Demerit	D-2
	Accrued Demerits/Fines	D-2
	Suspension	D-3
	Exception Dates	D-3
	Circjob 30: Accrued Fines and Demerits	D-3
	Circjob 31: Patron Suspension	D-3
	Circjob 37: Forgive Demerits	D-3
	Overview of Demerits Functionality	D-3
	Module Workspaces, Dialog boxes, Fields, and Messages Used in Demerits	D-4
	System Administration Module Workspaces, Dialog Boxes and Fields	D-4
	Circulation Module Dialog Boxes and Fields	D-10
	Circulation Module Messages Regarding Demerits	D-14
	WebVoyage Messages Regarding Demerits	D-15
	Defining How to Implement Demerits	D-17



## Contents

• Enabling and Configuring Demerits	D-18
System Administration Settings	D-18
WebVoyage Settings	D-23
Displaying Demerit Information in WebVoyage	D-23
Displaying Suspension Information in WebVoyage	D-24
Suspension Exception Dates	D-24
• Circulation Batch jobs	D-25
Circjob 30 Accrued Fines and Demerits	D-25
Circjob 31 Patron Suspension	D-26
Example of Circjobs 30 and 31	D-29
Circjob 37 Forgive Demerits	D-29
• Circulation Module Activity	D-31
Checking for Suspensions and Summing Demerits	D-31
Applying Real Demerits	D-34
Posting Against Demerits	D-34
Adding Demerits/Fines Manually	D-36
Manually Suspending a Patron Record	D-38
Editing Patron Suspension End Dates	D-40

---

**IN****Index****IN-1**

## **Contents**

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## About This Document

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### Purpose

This document provides instructions for using Voyager's Circulation module. The Voyager® Circulation Module allows you to perform circulation activities for your library using convenient workspaces that display patron and item information. You can access the Circulation functions from the Voyager Circulation toolbar or from the Circulation menu bar.

### Intended Audience

This document is intended for Voyager customers.

### Reason for Reissue

This user's guide incorporates and is being reissued for the following reasons:

- Updated the section [Item Status Dialog Box](#) on [page 5-19](#) with the new Applied By item status information.

## Document Summary

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This document consists of the following:

- |            |   |
|------------|---|
| Chapter 1  | <a href="#">“Getting Started”</a><br>This chapter describes the prerequisite installations and configurations necessary for beginning work in Voyager's Circulation module. |
| Chapter 2  | <a href="#">“Overview of the Circulation Process”</a><br>This chapter provides an overview of Circulation in the Voyager system.  |
| Chapter 3  | <a href="#">“Searching in the Circulation Module”</a><br>This chapter provides instructions on searching from within the Circulation module.                                |
| Chapter 4  | <a href="#">“Patron Records”</a><br>This chapter contains information about patron records.   |
| Chapter 5  | <a href="#">“Item Records”</a><br>This chapter contains information about item records.   |
| Chapter 6  | <a href="#">“Charge and Renew Function”</a><br>This chapter provides information on charging and renewing items.  |
| Chapter 7  | <a href="#">“Discharge Function”</a><br>This chapter provides information on discharging items.   |
| Chapter 8  | <a href="#">“Course Reserve”</a><br>This chapter provides information about course reserve functions.   |
| Chapter 9  | <a href="#">“Patron and Item Blocks”</a><br>This chapter provides information on Patron and Item blocks and how to override them.   |
| Chapter 10 | <a href="#">“Short Loans”</a><br>This chapter provides information about Short Loan functions.  |
| Chapter 11 | <a href="#">“Item Distribution”</a><br>This chapter provides information about distributing items to patrons.   |
| Chapter 12 | <a href="#">“Session Preferences”</a><br>This chapter provides information about session preference options in the Circulation module.                                      |
| Chapter 13 | <a href="#">“Circulation Menus”</a><br>This chapter provides information about the Circulation module's menus.  |

Appendix A	<a href="#">“Printing Templates”</a> This appendix provides information on how to change the appearance of various slips that are printed in the Circulation module.
Appendix B	<a href="#">“Printing Labels”</a> This appendix provides information on how to print spine and piece labels in the Circulation module.
Appendix C	<a href="#">“Circulation Self Check”</a> This appendix provides information on how to configure and use Voyager’s Self Check system.
Appendix D	<a href="#">“Demerits”</a> This appendix provides information on configuring and using Demerits instead of monetary fines.
Index	The <a href="#">Index</a> is an alphabetical, detailed cross-reference of topics.

## **Conventions Used in This Document**

The following conventions are used throughout this document:

- Names of commands, variables, stanzas, files, and paths (such as `/dev/tmp`), as well as selectors and typed user input, are displayed in `constant width` type.
- Commands or other keyboard input that must be typed exactly as presented are displayed in **`constant width bold`** type.
- Commands or other keyboard input that must be supplied by the user are displayed in ***constant width bold italic*** type.
- System-generated responses such as error messages are displayed in `constant width` type.
- Variable *portions* of system-generated responses are displayed in *constant width italic* type.
- Keyboard commands (such as **Ctrl** and **Enter**) are displayed in **bold**.
- Required keyboard input such as “Enter **vi**” is displayed in **`constant width bold`** type.
- Place holders for variable portions of user-defined input such as **ls -l *filename*** are displayed in ***italicized constant width bold*** type.
- The names of menus or status display pages and required selections from menus or status display pages such as “From the **Applications** drop-down menu, select **System-wide**,” are displayed in **bold** type.
- Object names on a window’s interface, such as the **Description** field, the **OK** button, and the **Metadata** tab, are displayed in **bold** type.

- The titles of documents such as *Curator Web Client User's Guide* are displayed in *italic* type.
- Caution, and important notices are displayed with a distinctive label such as the following:

**NOTE:**

Extra information pertinent to the topic.



**IMPORTANT:**

*Information you should consider before making a decision or configuration.*



**CAUTION:**

*Information you must consider before making a decision, due to potential loss of data or system malfunction involved.*



**TIP:**

*Helpful hints you might want to consider before making a decision.*

**RECOMMENDED:**

*Preferred course of action.*

**OPTIONAL:**

*Indicates course of action which is not required, but may be taken to suit your library's preferences or requirements.*

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### Introduction

---

To use Voyager's Circulation module, it must be installed on the operators computer. Also, operators who want to email from the Circulation client must make additional configurations.

The purpose of this chapter is to provide information regarding installing and configuring the Circulation module and login.

### Prerequisite Skills and Knowledge

---

To use this document effectively, you need knowledge of the following:

- Basic Microsoft® Interface navigation

### Before You Begin

---

Before you can work in the Circulation module, the following must occur:

- Install the Circulation client.
- Log in to the module.
- If wanted, operators can configure the `voyager.ini` file to create a user-defined time-out value for the **Charge** workspace.

- If wanted, operators set up the ability to e-mail from the Circulation module.

## **Installing the Circulation Client**

---

For instructions on installing the Voyager clients, see the *Voyager Technical User's Guide*.

## **Logging in to the Circulation Module**

---

Operators must log in to the Circulation module in order to use it. Users log in using the **Circulation Login** dialog box (see [Figure 1-1](#)).



---

**Figure 1-1. Circulation Login Dialog Box**

[Table 1-1](#) describes the fields and buttons of the **Circulation Login** dialog box.

**Table 1-1. Circulation Login Dialog Box**

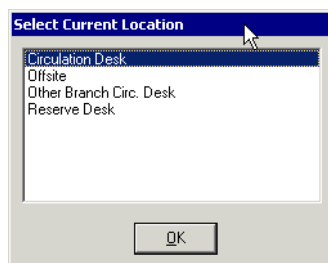
Field Name	Description
Operator ID	The Operators identification defined in the System Administration module.  <b>NOTE:</b> This is case sensitive.
Password	The Operators password defined in the System Administration module.  <b>NOTE:</b> This is case sensitive.
OK button	Continues the login process.
Exit button	Stops the login process.

**NOTE:**

The system allows three attempts to log in before closing the **Login** dialog box.

### Selecting a Location

Users who are authorized to perform circulation tasks at more than one Circulation desk (happening location) are presented with the **Select Current Location** dialog box (see [Figure 1-2](#)).



**Figure 1-2. Select Current Location Dialog Box**

[Table 1-2](#) describes the fields and buttons of the **Select Current Location** dialog box.

**Table 1-2. Select Current Location Dialog Box**

Field Name	Description
Locations list box	List of all Circulation happening locations for which the operator is authorized.  Configured in the System Administration module.  See <i>Locations</i> in the <i>Voyager System Administration User's Guide</i> , for more information.
OK button	Logs the operator in to the selected circulation desk.

**NOTE:**

Operators authorized to work at only one location do not see this dialog box.

The procedure to log in to the Circulation module is shown in [Procedure 1-1, Logging in to the Circulation Module and Selecting a Location](#).



---

### Procedure 1-1. Logging in to the Circulation Module and Selecting a Location

---

Use the following to log in to the Circulation module:

1. Launch the application by clicking the Voyager Circulation icon in your Voyager program group.

Result: The **Circulation Login** dialog box opens (see [Figure 1-3](#)).



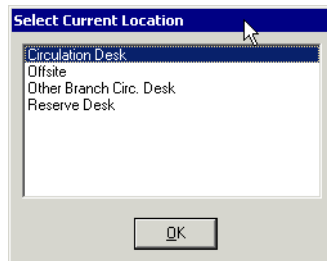
---

**Figure 1-3. Circulation Login Dialog Box**

2. Enter your Operator ID in the **Operator ID** field.
3. Enter your password in the **Password** field.
4. Click **OK** to continue or click **Exit** to close.

Result: If clicked **OK**, and if the user is authorized for a single Circulation happening location, they are logged in to the Circulation module.

If the user has authority to work at more than one Circulation happening location, the **Select Current Location** dialog box opens, as shown in [Figure 1-4](#). To set up Circulation happening locations, see *Circulation Happening Location* in the *Voyager System Administration User's Guide* for more information.



**Figure 1-4. Select Current Location**

5. Select the Circulation happening location that you want to log in to and click **OK**.

Result: The user is logged in to the Circulation module.

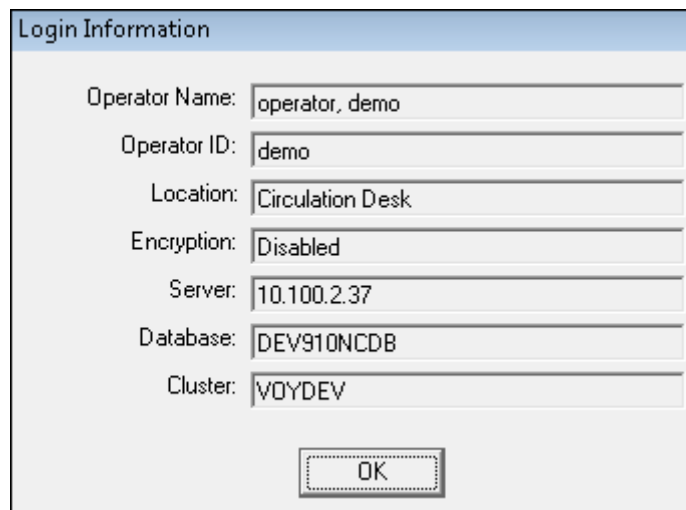
### Single Client Login

If the operator is already logged in to another Voyager module, and the operator has the `SingleLogin=` key of the `[GlobalLog]` stanza in the `voyager.ini` file set to Y (yes), then the operator simply runs the circulation executable file and will automatically be logged in to Circulation. For information about the Single Client Login feature, see the *Voyager Technical User's Guide*.

### Viewing Login Information

After successfully logging in, the following information can be displayed at any time during the circulation session using the **Login Information** dialog box (see [Figure 1-5](#)).

- Operator name
- Operator ID
- Location (the happening location to which the operator is logged in)
- Encryption (enabled/disabled)
- Server (as defined in the `Server=` parameter in the `voyager.ini` file)
- Database
- Circulation cluster



The image shows a 'Login Information' dialog box with a light blue header. It contains seven text input fields arranged vertically, each with a label to its left. The labels and their corresponding values are: 'Operator Name:' with 'operator, demo', 'Operator ID:' with 'demo', 'Location:' with 'Circulation Desk', 'Encryption:' with 'Disabled', 'Server:' with '10.100.2.37', 'Database:' with 'DEV910NCDB', and 'Cluster:' with 'VOYDEV'. At the bottom center of the dialog is an 'OK' button.

Field	Value
Operator Name:	operator, demo
Operator ID:	demo
Location:	Circulation Desk
Encryption:	Disabled
Server:	10.100.2.37
Database:	DEV910NCDB
Cluster:	VOYDEV

---

**Figure 1-5. Login Information Dialog Box**

---

### Closing a Circulation Function

You can close any Circulation function without exiting the Circulation module by selecting **Close** or **Close All** from the **File** menu.

---

### Exiting Circulation

You can exit the Voyager Circulation module by selecting **Exit** from the **File** menu.

---

### Configuring the voyager.ini file for Charge time-out

Once a patron is loaded into the **Charge** workspace and their patron record information displays, operators set a specific amount of time, within which if no activity occurs, the **Charge** workspace clears of the patron and charged item information.

This allows for additional security as well as, making it more difficult to accidentally charge an item to the wrong patron.

## The Time-out Timer

A timer starts when the patron information is displayed in the **Charge** workspace.

The following actions reset the timer:

- an item is charged
- a form related to the patron, such as their Charged Items Index is closed
- a new patron is displayed.

The following actions inactivate the timer:

- an operator manually clears the **Charge** workspace
- another form related to the patron is opened

For example, the **Fines/Fees** button on the **Charge** workspace is clicked and the patron's Fines/Fee information displays.

## ChargeTimeout Key

The ChargeTimeout= key is in the [Circulation] stanza of the `voyager.ini` file (typically found in `c:\voyager`). The default is set at 60 seconds (see [Figure 1-6](#)). This can be edited if wanted.

```
[Circulation]
Server=12.345.678.90
Port=xx30
Timeout=60
ChargeTimeout=60
NewVersion=
```

**Figure 1-6. Circulation Stanza Example**

[Table 1-3](#) shows the possible time-out values and Voyager's response.

**Table 1-3. Circulation ChargeTimeout Key Values**

ChargeTimeout Value	System Response
ChargeTimeout=(Blank)	No charge time-out, the timer will not count.
ChargeTimeout=0	No charge time-out, the timer will not count.

**Table 1-3. Circulation ChargeTimeout Key Values**

ChargeTimeout Value	System Response
ChargeTimeout=1-4 seconds	Counts 5 seconds.
ChargeTimeout=5 seconds or more	Counts the number of seconds specified.  <b>NOTE:</b> The default charge time-out value is 60 seconds.  There is no maximum value.

For additional information regarding the `voyager.ini` file see the *Voyager Technical User's Guide*.

The procedure for editing the charge time-out value is shown in [Procedure 1-2, Editing the Circulation Charge Time-out Value](#).



---

**Procedure 1-2. Editing the Circulation Charge Time-out Value**

---

Use the following to edit the time-out value:

1. From the `c:\voyager` directory on the computer, open the `voyager.ini` file.

**NOTE:**

Use Notepad® or some other text editor to edit this file.

2. Find the `[Circulation]` stanza, enter the number of seconds you want to set for the time-out value at the `ChargeTimeout=` key (see [Figure 1-6](#) on [page 1-7](#)).
3. Save, then close the `voyager.ini` file.

Result: The `ChargeTimeout=` value is edited.

---

## **E-mailing Patrons from the Circulation module**

---

Operators can e-mail patrons from the following areas in the Circulation module:

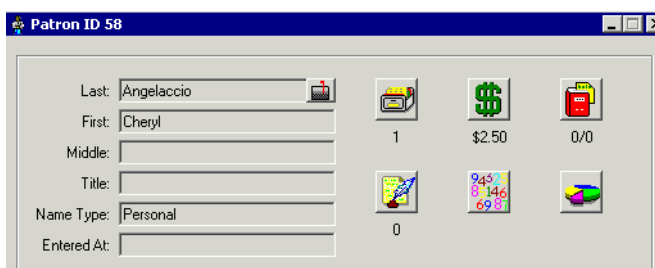
- **Patron Record** workspace, see [E-mailing from the Patron Record](#) on [page 4-155](#)



- **Charge** workspace, see [E-mailing from the Charge Workspace](#) on [page 4-156](#)
- **Charged to** dialog box accessed from the **Item** dialog box, see [E-mailing from the Charged To Dialog Box of a Charged Item](#) on [page 4-158](#)
- **Charged to** dialog box accessed from the **Course Reserve** dialog box, see [E-mailing from the Charged to Dialog Box of a Charged Reserve Item](#) on [page 4-159](#)

The **E-mail control** button will be active in those places, allowing operators to e-mail patrons from the Circulation module, if the patron's patron record has an active e-mail address. That is, when the effective dates include the system date.

[Figure 1-7](#) displays a patron record with an active **E-mail control** button.



**Figure 1-7. E-mail Control Button on the Patron Record**

Before an operator can send an e-mail from the Circulation module, he or she must have a valid email address and an e-mail program installed on the computer.

**NOTE:**

This does not need to be a MAPI compliant e-mail program.

## Creating the Mailto URL

When the user clicks the **E-mail control** button, the system creates a mailto URL using the text of the e-mail address.

The mailto URL format is 'mailto:' followed immediately by the e-mail text. It is mapped exactly, no punctuation is added, although internal spaces are allowed. For example, `mailto:Sue Student <student@yourschool.edu>`

**NOTE:**

The system will validate that the @ symbol is in the e-mail address, but it will do no other validation.

The URL handler is responsible for accepting spaces appropriately. It uses the e-mail program set up on the local computer. Therefore, e-mails will come from the local computer user.

After creating the mailto URL, the circulation client is no longer involved in the e-mail process. The computer's operating system contains the instructions on what to do with the mailto URL and with which e-mail client it is associated. The instructions in the operating system and the configuration of the e-mail client determines what occurs after the mailto URL is generated. Please refer to your Windows and e-mail client documentation for additional information.

---

## Overview of the Circulation Process

# 2

---

### Introduction

This chapter provides an overview of Circulation in the Voyager system.

---

### Purpose of this Chapter

This chapter discusses the following main functions of the circulation module:

- charging items to patrons
- requesting items for patrons
- maintaining course reserves
- maintaining patron information on the patron record
- maintaining circulation transaction information using patron counters
- maintaining patron fine and fee information

The System Administration module is where the rules regarding circulation activity are defined, and it is in the Circulation module where those rules are applied and the work of circulating items to patrons and related activities occur. See *Circulation Policy Definitions* in the *Voyager System Administration User's Guide* for information regarding defining circulation policies and rules.

Voyager's circulation subsystem is based on the concept of a Circulation Cluster. Circulation transactions, holds, recalls, and short loans all occur within the context of a Circulation Cluster. Additionally, fines and fees for a patron will be maintained per Circulation Cluster. Course reserve material will be retained by a Circulation Cluster as well.

A Circulation Cluster contains patrons, items, and the rules under which they function. Those rules are defined in the **Circulation - Policy Definitions** workspace. The patrons are members of at least one patron group which is connected to a Circulation Policy Group. Items have a location which is connected to a Circulation Policy Group. They also have an item type which is connected to a Circulation Policy Matrix associated with a Circulation Policy Group.

Your Voyager database consists of at least one Circulation Cluster.

For many libraries the single cluster setup, which is traditional Voyager functionality, is sufficient for their circulation needs.

## Overview of the Circulation Process

---

A patron's ability to charge and request items depends on the patron group to which the patron belongs and the type of item the patron wants to charge or request.

Rules are set up in a Circulation Policy Group and an associated Circulation Policy Matrix to govern circulation transactions. A Circulation Policy Group is a set of locations and circulation policies. These locations include both the circulation desks (happening locations) and the shelving locations.

The policies defined in a Circulation Policy Group are in effect for all patrons who are members of the patron groups within that Circulation Policy Group regardless of the item involved in the circulation transaction. Many of these policies involve the block points for patrons, such as the maximum number of items a patron can borrow.

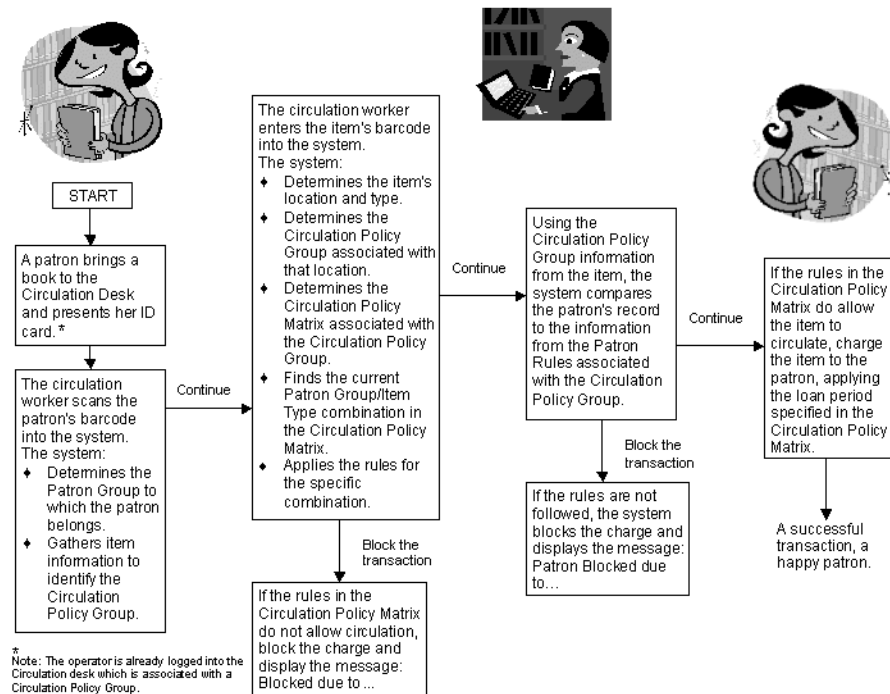
Additionally, each Circulation Policy Group is associated with a Circulation Policy Matrix. A Circulation Policy Matrix connects a patron group-item type combination to a set of policies. The policies in the Circulation Policy Matrix provide the rules for circulation transactions between specific patron groups and specific item types, such as the length of the loan period for a CD-ROM charged to a staff member.

An item has two important characteristics that relate to circulation, its location and its item type. The location, where the item is shelved, connects the item to its Circulation Policy Group through the locations that are defined as part of that group. That is, an item belongs to a Circulation Policy Group if it is shelved in one

of the locations included in the Circulation Policy Group. The item type, such as a book or CD-ROM, is one part of a Circulation Policy Matrix that is associated with a Circulation Policy Group. The Circulation Policy Matrix contains specific patron group-item type combinations and provides the rules which govern transactions.

The key to circulation in Voyager is to bear in mind that the item essentially governs the transaction.

The circulation process is shown in [Figure 2-1](#).



**Figure 2-1. The Circulation Process**

Additionally, each Circulation Desk also belongs to a Circulation Policy Group. It is possible for the item used in a circulation transaction to belong to a different Circulation Policy Group than the Circulation Desk where the transaction is taking place. In this case the transaction is an 'exception' transaction and will require an operator override. The policies for this transaction will still come from the Circulation Policy Group to which the item belongs.

## **Terms Used in Circulation**

---

This section defines the terms that are used in the Circulation module.

### **Patron and Patron Group**

---

A patron is someone that uses the services of the library. Each patron has a patron record that contains personal data.

A patron group refers to a group of patrons that share similar characteristics and circulation privileges.

### **Item and Item Type**

---

An item is a piece of library material that may be borrowed or used by a patron.

Each item must have an item type. Item types define the kinds of materials owned by a library. For example, an item type could be a CD-ROM, book, or map.

### **Circulation Policy Group**

---

A Circulation Policy Group is a set of locations and policies that are applied to patron groups. The locations include both the circulation desks and the shelving locations.

The policies attached to a Circulation Policy Group are policies that are in effect for a patron group regardless of the item type involved in a circulation transaction. Many of these policies involve the block points for patrons, such as the maximum number of items a patron can borrow.

An item belongs to a Circulation Policy Group if it is shelved in one of the locations in the Circulation Policy Group.

### **Circulation Policy Matrix**

---

The Circulation Policy Matrix associates a specific Patron Group and a specific Item Type with a set of policies. Each Circulation Policy Group is associated with a set of Circulation Policy Matrices. The policies in the Circulation Policy Matrices are rules for circulation transactions between specific patron groups and specific item types.

## Circulation Cluster

---

A Circulation Cluster is a group of Patron Groups and Circulation Policy Groups. By extension, the cluster also contains the patrons belonging to those Patron Groups, the items with locations belonging to the Circulation Policy Group, and the Circulation Policy Matrices associated with the Circulation Policy Group.

## Home Circulation Cluster

---

The home Circulation Cluster is the Circulation Cluster to which a patron or an item belong.

## Parent Patron Record

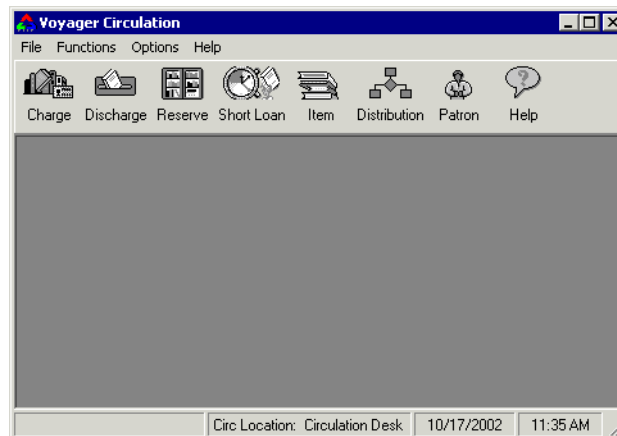
---

A parent patron record is the patron record that resides in the patron's home cluster.

## The Circulation Workspace

---

After logging in to the Circulation module, the **Circulation** workspace opens (see [Figure 2-2](#)). It contains a listbar with the **Charge**, **Discharge**, **Reserve**, **Short Loan**, **Item**, **Distribution**, **Patron**, and **Help** buttons from which users access the various workspaces within the Circulation module.



---

**Figure 2-2. Circulation Workspace and Listbar**





### Introduction

---

Operators may search for patron records as well as, items in the Circulation module.

### Purpose of this Chapter

---

This chapter provides instructions on searching from within the Circulation module, specifically

- Searching for a patron record
  - Searching from the **Patron** workspace
  - Searching from the **Charge** workspace
- Searching for an item
  - Keyword searches
  - Headings/Non-Keyword searches
  - Builder searches
  - Searching from the Item menu

## Searching for a Patron Record

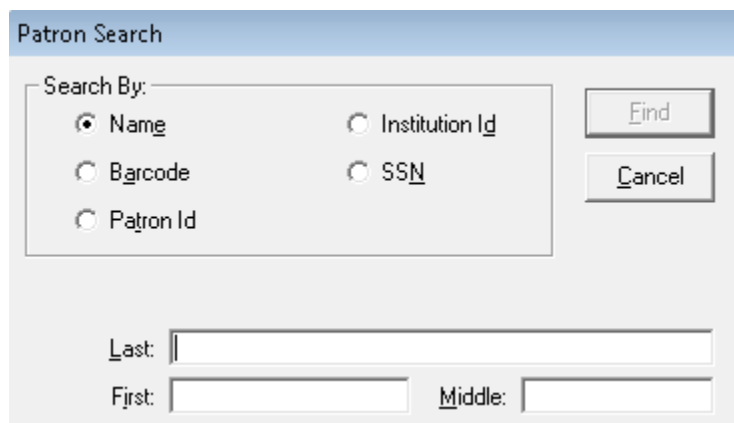
---

In the Circulation module, operators can search for a Patron Record from the **Patron** or the **Charge** workspaces.

## Searching for a Patron from the Patron Workspace

---

The **Patron Search** dialog box allows you to search for a patron record (see [Figure 3-1](#)).



The image shows a 'Patron Search' dialog box. It has a title bar 'Patron Search'. Below the title bar, there is a 'Search By:' section with five radio buttons: 'Name' (selected), 'Barcode', 'Patron Id', 'Institution Id', and 'SSN'. To the right of these buttons are two buttons: 'Find' and 'Cancel'. Below the search options, there are three text input fields: 'Last:', 'First:', and 'Middle:'.

---

**Figure 3-1. Patron Search Dialog Box**

[Table 3-1](#) describes the fields in the **Patron Search** dialog box.

**Table 3-1. Patron Search Dialog Box**

Option	Description	Required	Range
Search By	<p>Determines the type of search to be conducted</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Barcode</li> <li>• SSN</li> <li>• Institution ID</li> <li>• Voyager patron ID number</li> </ul> <p>Use Session Preferences to identify the Default Patron Search. See the <a href="#">Items and Searching Tab</a> section starting on page <a href="#">13-7</a> regarding this setting.</p>	One button must be selected to determine the fields in the lower half of the <b>Patron Search</b> dialog box.	Radio button
Find	Executes the search.	Yes, activates when information is entered in a search field.	Button
Cancel	Exits the <b>Patron Search</b> dialog box without searching.		Button
If the <b>Name</b> radio button is selected in the Search By section:			
Library	Name of the Circulation Cluster in which you are searching.	This field is only visible when there is more than one circulation cluster available to search.	Drop-down list of all available clusters.
Last	Last name of the patron for whom you want to search.	Yes	30 characters Auto-truncates
First	First name of the patron for whom you want to search.	No	Alphanumeric, punctuation, and spaces Upper and lower cases allowed 20 characters

**Table 3-1. Patron Search Dialog Box**

Option	Description	Required	Range
Middle	Middle name of the patron for whom you want to search.	No	Alphanumeric, punctuation, and spaces  Upper and lower cases allowed  20 characters
If the <b>Barcode</b> radio button is selected in the Search By section:			
Barcode	Barcode of the patron for whom you want to search.	Yes	Alphanumeric, punctuation, and spaces  Upper and lower cases allowed  25 characters
If the <b>SSN</b> radio button is selected in the Search By section:			
SSN	Social security number of the patron for whom you want to search.  <b>NOTE:</b> If the <b>Mask Patron Social Security Number</b> check box is selected in the circulation operators profile, the <b>SSN</b> radio button is unavailable.	Yes	Numeric  9 characters
If the <b>Institution ID</b> radio button is selected in the Search By section:			
Institution ID	Institution ID number of the patron for whom you want to search.	Yes	Alphanumeric, punctuation, and spaces  Upper and lower cases allowed  20 characters  Auto-truncates
If the <b>Patron ID</b> radio button is selected in the Search By section:			
Patron ID	Voyager patron ID number of the patron for whom you want to search.	Yes	Numeric  0-9

**NOTE:**

When searching for a patron by name, the focus always appears in the **Last Name** field.

The procedure for searching for a patron record is shown in [Procedure 3-1, Searching for a Patron Record from the Patron Workspace](#).



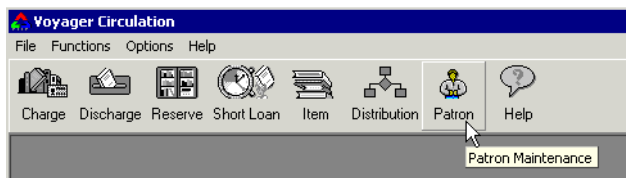
---

**Procedure 3-1. Searching for a Patron Record from the Patron Workspace**

---

Use the following to search for and display a patron record.

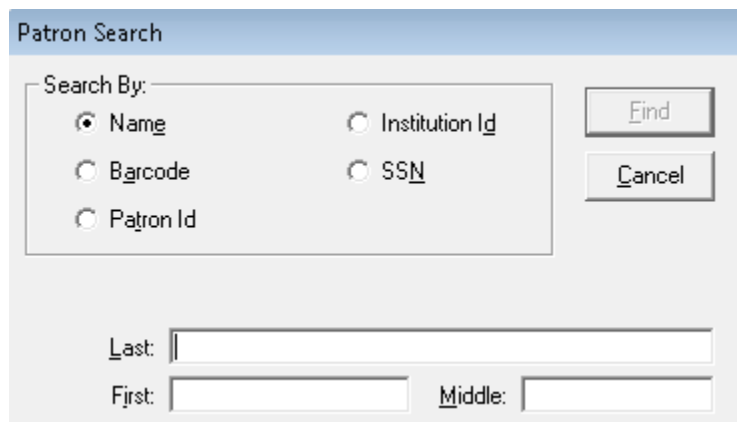
1. After logging in to the Circulation module, click the **Patron Maintenance** button ([Figure 3-2](#)) from the Circulation toolbar, or select **Patron (Ctrl + P)** from the **Functions** menu.



---

**Figure 3-2. Patron Maintenance Button**

Result: The **Patron Search** dialog box opens (see [Figure 3-3](#)).

The image shows a 'Patron Search' dialog box. It has a title bar 'Patron Search'. Below the title bar, there is a 'Search By:' section with five radio buttons: 'Name' (selected), 'Barcode', 'Patron Id', 'Institution Id', and 'SSN'. To the right of these buttons are two buttons: 'Find' and 'Cancel'. Below the 'Search By:' section, there are three text input fields: 'Last:', 'First:', and 'Middle:'. The 'Last:' field is currently empty, while the 'First:' and 'Middle:' fields are also empty.

---

**Figure 3-3. Patron Search Dialog Box**

2. Choose a search method by selecting the **Name**, **Barcode**, **SSN**, **Institution ID** , or **Patron ID** radio button in the **Search By** section. To search by:
  - a. Name, click the **Name** radio button.
  - b. Barcode, click the **Barcode** radio button.
  - c. Social Security Number, click the **SSN** radio button.
  - d. Institution ID number, click the **Institution ID** radio button.
  - e. Patron ID number, click the **Patron ID** radio button.

**NOTE:**

You can also display the **Patron Search** dialog box from an open patron record by selecting **Search for Patron** from the **Patron** menu (or right-click and select the same command from the submenu).

3. If searching by
  - a. Name, enter the patron's last name in the **Last** field. If wanted enter the patron's first name in the **First** field and the patron's middle name or initial in the **Middle** field.
  - b. Barcode, enter the patron's barcode in the **Barcode** field.
  - c. SSN, enter the patron's social security number in the **SSN** field.
  - d. Institution ID, enter the patron's institution ID number in the **Institution ID** field.
  - e. Patron ID, enter the patron's Voyager ID number in the **Patron ID** field.

4. Click **Find** to execute the search, or click **Cancel** to exit without searching.

Result: If the search was executed, there are three search result options.

1. A patron matching the search criteria was not found (see [Figure 3-4](#)).



**Figure 3-4. Patron Not Found Message**

2. A single patron was found and their patron record automatically displays (see [Figure 3-5](#)).

 A screenshot of a software window titled "Patron ID 245". The window contains a form with the following fields: Last (Professor), First (Paula), Middle (empty), Title (empty), Name Type (Personal), and Entered At (Circulation Desk). To the right of these fields are several icons and numerical values: a book icon with "2", a dollar sign icon with "\$10.00", a red book icon with "0/2", a blue book icon with "0", a colorful icon with "945 146 69", and a green icon. Below the form is a tabbed interface with tabs for "Patron Id", "Address/Phone", "Counters", "Proxy Patrons", and "History". The "Patron Id" tab is active, showing a table with the following data:
 

Barcode	Patron Group	Status/Date	Operator Id
454545	Faculty	Active - 10/18/2002	demo

 At the bottom of the window, there are fields for "Institution Id:" and "SSN: 545454545".

**Figure 3-5. Patron Found and Their Patron Record Displays**

3. Multiple patrons that match the search criteria are found (see [Figure 3-6](#)). The operator needs to select the appropriate patron from the list. See [Multiple Patrons Match the Search Criteria](#) on [page 3-9](#) for more information.

The image shows a 'Patron Search' dialog box. At the top, there's a 'Search By:' section with four radio buttons: 'Name' (selected), 'SSN', 'Barcode', and 'Institution Id'. To the right of these are 'Find' and 'Clear' buttons. Below this, there are input fields for 'Last:' (containing 'sm?'), 'First:', and 'Middle:'. At the bottom, there's a table with three columns: 'Patron Name', 'SSN', and 'Institution Id'. The table contains three rows of data. Below the table is a large empty rectangular area, and at the very bottom are 'OK' and 'Cancel' buttons.

Patron Name	SSN	Institution Id
Smith, Donna		100106
Smith, Sandy		6209
Smorch, Tom		100107

---

**Figure 3-6. Multiple Patrons Found That Match the Search Criteria**

---

## Searching for a Patron from the Charge Workspace

---

Operators can also search for patrons from the **Charge** workspace when attempting to charge an item.

The procedure for searching for a patron from the **Charge** workspace is shown in [Procedure 3-2, Searching for a Patron from the Charge Workspace](#).



### Procedure 3-2. Searching for a Patron from the Charge Workspace

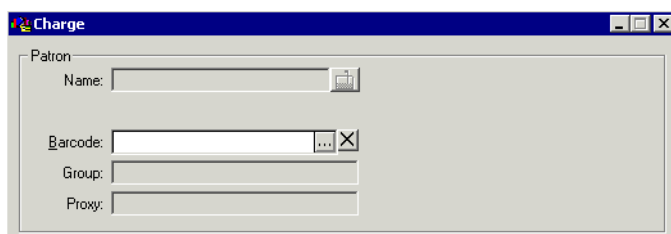
---

Use the following to search for and display a patron record.

1. After logging in to the Circulation module, click the **Charge** button from the Circulation toolbar, or select **Charge/Renew (Ctrl + H)** from the **Functions** menu.

Result: The **Charge** workspace opens (see [Figure 3-7](#)).





**Figure 3-7. Charge Workspace**

2. Click the ellipsis button in the **Patron Barcode** field.
3. The **Patron Search** dialog box opens.
4. Choose a search method in the **Search By** section.
5. Enter the search criteria specific to the search method option that you selected.
6. Click **Find** to execute the search, or click **Cancel** to exit without searching.

Result: If the search was executed, there are three search result options.

1. A patron matching the search criteria was not found.
2. The patron was found and their patron record displays
3. Multiple patrons that match the search criteria are found. See [Multiple Patrons Match the Search Criteria](#) on [page 3-9](#).

---

### Multiple Patrons Match the Search Criteria

---

If you search for a patron and more than one patron matches your search criteria, the **Patron Search** dialog box updates and lists all matches (see [Figure 3-8](#)).

The Patron Search dialog box has a title bar 'Patron Search'. Below it, a 'Search By:' section contains four radio buttons: 'Name' (selected), 'Barcode', 'SSN', and 'Institution Id'. To the right are 'Find' and 'Clear' buttons. Below this is a 'Library' dropdown menu set to 'Local Database'. There are input fields for 'Last:' (containing 'd'), 'First:', and 'Middle:'. A table displays search results with columns 'Patron Name', 'SSN', and 'Institution Id'. The first row, 'Davis, Maryellen', is highlighted. At the bottom are 'OK' and 'Cancel' buttons.

Patron Name	SSN	Institution Id
Davis, Maryellen		100022
Dean, Corey		100023
Dempsey, David A.		100024
Denault, Daniel		100025
Dill, Jens		100027
Doe, Jane		123
Dong, Louise		100028
Drescher, Robert		3333

**Figure 3-8. Multiple Patrons Match Search Criteria**



**TIP:**

To facilitate easier identification and access to relevant information, you can sort all display columns in Voyager Circulation. A click of the column header (for example, Patron Name) organizes the display in ascending or descending sort order; a second click of the same header reverses the sort.

The procedure for selecting the correct patron after a search where several patrons matched the search criteria is shown in [Procedure 3-3, Selecting a Patron When Multiple Patrons Match the Search Criteria](#).



**Procedure 3-3. Selecting a Patron When Multiple Patrons Match the Search Criteria**

Use the following to select the correct patron after a search where several patrons matched the search criteria.

1. From the updated **Patron Search** dialog box listing several patrons, select one of the patrons.
2. Click the **OK** button (or double-click the patron's name). Or click **Cancel** to close the **Patron Search** dialog box without selecting a patron.

Result: If you are searching from the **Patron** workspace, the patron record displays.

If you are searching from the **Charge** workspace, the patron name information displays in the **Charge** workspace.

---

## Searching for an Item

---

There are several ways to search for an item in the circulation module.

- Item barcode
- Keyword
- Headings/Non-Keyword
- Item menu searches

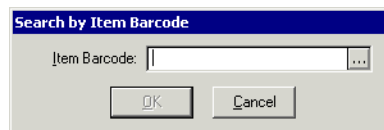
## Searching for an Item by Barcode

---

The **Search by Item Barcode** dialog box ([Figure 3-9](#)) allows you to search for and display an item record.

It contains a single field for the item's barcode, and an ellipses button.

---



---

**Figure 3-9. Search by Item Barcode Dialog Box**

Selecting the ellipses button opens the **Search** dialog box (see [Searching for an Item Using Keyword, Headings/Index Selection, and Builder Searches](#) on [page 3-15](#)).

The procedure for searching for an item record by barcode is shown in [Procedure 3-4, Searching for an Item Record by Barcode](#).



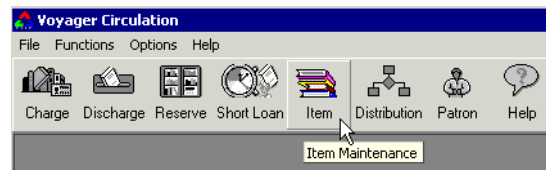
---

### Procedure 3-4. Searching for an Item Record by Barcode

---

Use the following to search for an item record by barcode.

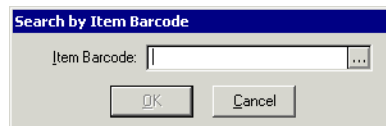
1. Select **Item (Ctrl + I)** from the **Functions** menu or click the **Item Maintenance** button on the Circulation toolbar (see [Figure 3-10](#)).



---

**Figure 3-10. Item Button**

Result: The **Search by Item Barcode** dialog box opens (see [Figure 3-11](#)).



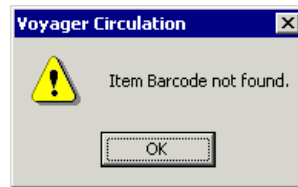
---

**Figure 3-11. Search by Item Barcode Dialog Box**

2. Enter the item's barcode by scanning or entering it into the **Item Barcode** field, then press enter or click **OK**.

Result: There are three search result options.

1. An item matching the search criteria was not found (see [Figure 3-12](#)).



**Figure 3-12. Item Record Not Found Message**

2. A single item was found and the item record automatically displays (see [Figure 3-13](#)).

 A screenshot of the "Item Record" window. The title bar says "Item Record". Below the title bar is a text area containing the title "Papers of Martin Luther King, Jr. / senior editor, Clayborne Carson ; volume editors, Ralph E. Luker, Penny A. Russell ; advisory editor, Louis R. Hailan." To the right of the title bar are several icons and two numeric fields, both showing "0". Below the title bar is a table with the following data:
 

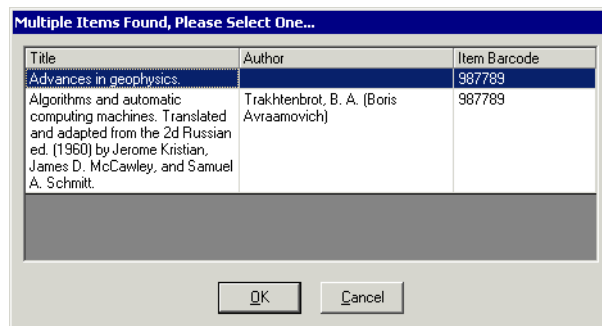
Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
Main	Book	Not Charged			0	26158

 Below the table are several tabs: "Bib Brief", "Holdings", "Item/Holdings", "Item Details", and "Item History". The "Bib Brief" tab is selected, showing a form with the following fields:
 

- Author: King, Martin Luther, Jr., 1929-1968.
- Edition:
- Publisher: University of California Press.
- Place/Date: Berkeley : 1992
- Pub. No.:
- Series:
- ISSN:
- System No.: ocm24847922
- ISBN: 0520079507 (cloth : alk. paper)
- LCCN: 91042336
- Owning Library: Training Master DB

**Figure 3-13. Item Found and the Item Record Displays**

3. Multiple items that match the barcode are found (see [Figure 3-14](#)). Select the appropriate match and click **OK**.



---

**Figure 3-14. Multiple Items Found That Match the Search Criteria**

Result: The item record displays (see [Figure 3-15](#)).

---

The "Item Record" window displays the following information:

- Title:** Advances in geophysics.
- Location:** Main
- Item Type:** serial
- Item Status:** Not Charged
- Enum:**
- Chron:**
- Copy:** 0
- Barcode:** 987789

Below the table are tabs for Bib Brief, Holdings, Item/Holdings, Item Details, and Item History. The Item Details tab is active, showing:

- Author:**
- Edition:**
- Publisher:** Academic Press,
- Place/Date:** New York, 1952
- Pub. No.:**
- Series:**
- ISSN:** 00652687
- System No.:** [CaQTULAS]121011324
- ISBN:**
- LCCN:** 52012266 /v66
- Owning Library:** Training Master DB

---

**Figure 3-15. Item Record Display**

---

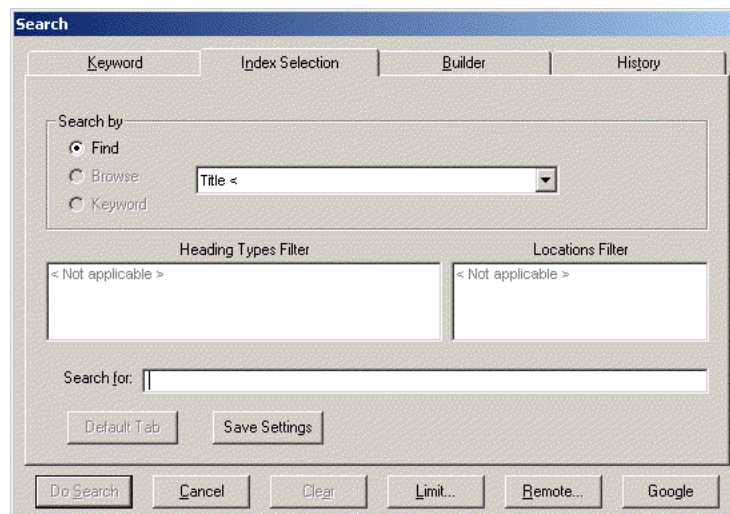
## Searching for an Item Using Keyword, Headings/Index Selection, and Builder Searches

If the barcode is not available, clicking the ellipses button in the **Search by Item Barcode** dialog box opens the **Search** dialog box.

### Search Dialog Box

The **Search** dialog box ([Figure 3-16](#)), available in all of the Voyager staff modules, provides a way to search your library's catalog. It contains the following tabs.

- **Keyword** tab (see [Keyword Tab and Keyword Searching](#) on [page 3-16](#))
- **Index Selection** tab (see [Index Selection Tab](#) on [page 3-20](#))
- **Builder** tab (see [Builder Tab and Builder Searching](#) on [page 3-27](#))
- **History** tab (see [History Tab](#) on [page 3-31](#))



**Figure 3-16.** Search dialog box

#### NOTE:

By default, the **Index Selection** tab displays when the **Search** dialog box opens. To navigate between search tabs, you can either click the appropriate tab or press the **Alt** key plus the letter underlined in the tab name.

If configured, there can be another feature, a user-defined search, available on each tab regardless of the type of search. See [User-Defined Alternate Search Button](#) on [page 3-55](#).

User-defined limits can be applied to some searches. See [Search Limits](#) on [page 3-56](#).

## Keyword Tab and Keyword Searching

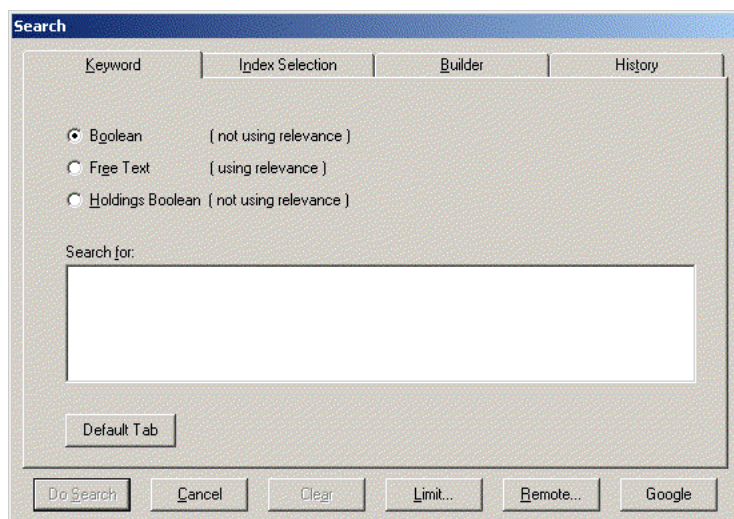
---

The **Keyword** tab ([Figure 3-17](#)) of the **Search** dialog box allows you to conduct keyword searches of all MARC fields and subfields in the bibliographic and holdings records. Users can specify the tag/subfields to search or specify an index to search by including the tag/subfield or index code before the search term.

### NOTE:

The **Holdings Boolean** radio button is an optional feature which your site may or may not have chosen to implement.

---



---

**Figure 3-17. Keyword tab of the Search dialog box**

Limits can be applied to the Boolean and Free Text Keyword searches. However, they cannot be applied to the Holdings Boolean search. See [Search Limits](#) on [page 3-56](#).

Users must select a search type radio button and enter search criteria in the **Search for** field to enable the **Do Search** button. See [Table 3-2](#) for a description of the options available on the **Keyword** tab to invoke a keyword search.



**NOTE:**

An (R) in the first column of the table designates a required entry. Unless otherwise specified, characters can be alphabetic or numeric, uppercase and/or lowercase, and may include punctuation and spaces.

**Table 3-2. Description of the Keyword tab**

Option	Description
Boolean	<p>Performs a keyword search of the bibliographic record using Boolean terms (and, or, not) without using relevance.</p> <p>When you select <b>Boolean</b>, remember to insert Boolean terms. Otherwise, you receive a <code>Malformed Query</code> error message.</p>
Free Text	<p>Performs a keyword search of the bibliographic record using relevance without Boolean operators.</p>
Holdings Boolean (optional feature)	<p>Performs a keyword search, without using relevance, of holdings records in your local database.</p> <p>Provides the flexibility to locate coded data, for example, inside the call number of MARC holdings records.</p> <p>Must use Boolean operators if using more than one search term.</p> <p>The default index searched is HKEY.</p> <p><b>NOTE:</b> This search is not available for remote searching.</p>

**Table 3-2. Description of the Keyword tab**

Option	Description
Search for (R)	<p>Enter search criteria in this field. Search criteria separated by spaces may require quotation marks to achieve the intended result. Example:</p> <p>“world war” “41051654 //r944”</p> <p>Wildcard characters are as follows.</p> <ul style="list-style-type: none"><li>• ? (question mark) Use the question mark for multiple-character, wildcard searches at the beginning, middle, or end of your search terms.</li><li>• % (percent sign) Use the percent sign for single-character wildcard searches.</li></ul> <p><b>NOTE:</b> Wildcard characters can be used in Free Text searches, Builder searches, and command line searches (that do not use a subfield-limited keyword index). Wildcard characters are not available for use with Z39.50 searches.</p> <p>Add one of the following operators before the search term (in a Free Text search) to specify additional characteristics.</p> <ul style="list-style-type: none"><li>• + (plus sign) The term must display in the record.</li><li>• ! (exclamation point) Records with the term are to be excluded.</li><li>• * (asterisk) The term is important.</li></ul> <p>You can also do command line searching. See <a href="#">Command Line Searching</a> on <a href="#">page 3-19</a>.</p>

**Table 3-2. Description of the Keyword tab**

Option	Description
Default Tab	<p>Identifies which tab displays as the default when the Search function is initiated.</p> <p>This button is inactive on the tab selected as the default.</p> <p>At installation, the <b>Index Selection</b> tab is the default.</p> <p>This option is available on the following tabs: <b>Keyword</b>, <b>Index Selection</b>, and <b>Builder</b>.</p> <p><b>NOTE:</b> This button does not display when <b>Retain Last Search</b> is selected.</p>
Do Search	Executes the search.
Cancel	Cancels the search and closes the <b>Search</b> dialog box.
Clear	Deletes the search term(s) in the <b>Search for</b> text box.
Limit	<p>Opens the <b>Search Limits</b> dialog box, where you can limit your search by language, location, date, or other variables you've configured.</p> <p><b>NOTE:</b> Limits cannot be applied to holdings keyword searching.</p> <p>See <a href="#">Search Limits</a> on <a href="#">page 3-56</a>.</p>
URI Search	<p>If configured, this button invokes a user-defined URI (Uniform Resource Identifier) to search outside the Voyager database.</p> <p>See <a href="#">User-Defined Alternate Search Button</a> on <a href="#">page 3-55</a>.</p>

Results of Boolean and Free Text searches are displayed in a **Titles Index** dialog box, and results of Holdings Boolean searches are displayed in a **Holdings Index** dialog box. See [Titles Index Dialog Box](#) on [page 3-31](#).

### Command Line Searching

Users can do command line searching by specifying MARC record tags/subfields to search or an index to search and the existing rules for Boolean searching.

- To search keyword composite indexes use the 4 letter code (see the *Voyager System Administration User's Guide*). For example, the search code NKEY (author name) searches by tags 100 aqd, 110 abcdefgl, and so forth. Another command line search example using GKEY as the keyword index code is as follows.

**GKEY pinnochio and GKEY disney**

- To search tags, use the three-numeric character of the tag followed by the single subfield (245b, 010a, 035a, 650x). The search is keyword except for number fields such as LCCN, ISBN, and ISSN which are left-anchored.

Truncation as well as boolean operators and quotation marks for phrase searching may be used (245a text? AND commentary) for the keyword indexed searches. You may also search for more than one tag at a time (650a "middle eastern literature" AND 100a pritchard).

### **Other Keyword Search Considerations/Options**

Optionally, your system administrator may implement dynamic noise word reduction to improve performance of keyword searches. This option eliminates common words from a user's query for the purpose of searching but retains them for the purpose of relevance ranking.

The following is a list of stop words used with this feature.

- AND
- OR
- NOT
- OF
- IN
- THE
- WITH
- TO
- FOR

The dynamic noise word reduction capability is set with NOISEWORDFILTER in the server-side voyager.ini file. Refer to the *Voyager Technical User's Guide* or see your system administrator for more information.

### **Index Selection Tab**

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Headings/Index Selection searching allows users to perform left-anchored bibliographic searches, holdings searches, authorities searches, and headings searches. In addition to system defined searches, your institution can define additional searches. Search types are created in System Administration. See the *Voyager System Administration User's Guide* for details.

Limits can be applied to those Index Selection searches conducted on left-anchored indexes. However, they cannot be applied to headings searches. See [Search Limits](#) on [page 3-56](#).

[Figure 3-18](#) displays the **Index Selection** tab of the **Search** dialog box.

**Figure 3-18. Index Selection tab of the Search dialog box**

[Table 3-3](#) describes the **Index Selection** tab. When a heading search is selected from the drop-down menu, the user must select either the **Find** or **Browse** radio button to govern the search. See [Find and Browse Searches](#) on [page 3-25](#).

**NOTE:**

An (R) in the first column of the table designates a required entry. Unless otherwise specified, characters can be alphabetic or numeric, uppercase and/or lowercase, and may include punctuation and spaces.


**Table 3-3. Description of the Index Selection tab**

Name	Description
Find	Find searches match specific records of the <b>Search by</b> type to the terms entered in the <b>Search for</b> field.  The result is a finite number of records.  See <a href="#">Find and Browse Searches</a> on <a href="#">page 3-25</a> for more information.

**Table 3-3. Description of the Index Selection tab**

Name	Description
Browse	<p>Displays an index of headings that can be browsed based on the <b>Search by</b> selection, any corresponding filter selections, and a <b>Search for</b> value.</p> <p>Available with headings or call number searches.</p> <p>See <a href="#">Find and Browse Searches</a> on <a href="#">page 3-25</a> for more information.</p>
Keyword	<p>Displays a headings list from which to select when exact word order or the initial words are unknown.</p> <p>See <a href="#">Headings Keyword Searches</a> on <a href="#">page 3-26</a> for more information.</p>
Search type drop-down list (R)	<p>Unlabeled field containing a drop-down menu of searches available.</p> <p>The list is determined by search usage with the most used search at the top of the drop-down.</p> <p>The types of searches are system defined and user defined in the System Administration module. See the <i>Voyager System Administration User's Guide</i>.</p> <p><b>NOTE:</b> OPAC headings searches and Staff headings searches are available in the Cataloging module. However, only OPAC headings searches are available in the Acquisitions and Circulation modules.</p>
Heading Types Filter	<p>Users can select a Heading Type filter to further limit a heading or a headings keyword search. Resulting records must contain the heading type selected and match the search criteria.</p> <p>The types of searches are system defined.</p> <p><b>NOTE:</b> These filters may be suppressed in the System Administration module.</p>

**Table 3-3. Description of the Index Selection tab**

Name	Description
Locations Filter	<p>Users can select a Locations filter to further limit a search when doing call number searches.</p> <p>Locations are defined locally in the System Administration module. See the <i>Voyager System Administration User's Guide</i>.</p> <p> <b>TIP:</b> By limiting a call number search by location, you can get an online shelf list.</p>
Search for (R)	<p>Enter your search term(s) or phrase(s) in the <b>Search for</b> field (1-149 characters).</p> <p>Use Boolean operators (and, or, not) to achieve the best match with your search string.</p> <p>Use quotation marks to identify phrases.</p> <p>Use a question mark (?) to truncate the search term if not automatically truncated. See <a href="#">Automatic Truncation for Index Selection Searches</a> on <a href="#">page 3-56</a> for more information.</p>
Default Tab	<p>Identifies which tab displays as the default when the Search function is initiated.</p> <p>This button is inactive on the tab selected as the default.</p> <p>At installation, the <b>Index Selection</b> tab is the default.</p> <p>This option is available on the following tabs: <b>Keyword</b>, <b>Index Selection</b>, and <b>Builder</b>.</p> <p><b>NOTE:</b> This button does not display when <b>Retain Last Search</b> is selected.</p>

**Table 3-3. Description of the Index Selection tab**

Name	Description
Save Settings	<p>Saves values on the current search tab.</p> <p>The search code for the index is saved.</p> <p>The saved settings display each subsequent time this tab is accessed.</p> <p>To change settings, enter new values on the tab and click <b>Save Settings</b>.</p> <p><b>NOTE:</b> When the index is deleted, the index code is changed, or it is suppressed, a standard error message is displayed. When the user responds by clicking <b>OK</b>, the default setting is cleared and the first index in the list and the first connector display.</p> <p>This option is available on the following tabs: <b>Index Selection</b> and <b>Builder</b>.</p> <p><b>NOTE:</b> This button does not display when <b>Retain Last Search</b> is selected.</p>
Do Search	Executes the search.
Cancel	Cancels the search.
Clear	Deletes the search term(s) in the <b>Search for</b> field.
Limit	<p>Opens the <b>Search Limits</b> dialog box, where you can limit your search by language, location, date, or other variables you've configured.</p> <p><b>NOTE:</b> The <b>Limits</b> button is not available for Headings or Holdings Keyword searches.</p> <p>See <a href="#">Search Limits</a> on <a href="#">page 3-56</a>.</p>
URI Search	<p>If configured, this button invokes a user-defined URI (Uniform Resource Identifier) to search outside the Voyager database.</p> <p>See <a href="#">User-Defined Alternate Search Button</a> on <a href="#">page 3-55</a>.</p>

Results of searches from the **Index Selection** tab display in either the **Titles Index** dialog box or **Headings List** dialog box. See [Titles Index Dialog Box](#) on [page 3-31](#) and [Headings List Dialog Box](#) on [page 3-39](#).



## Find and Browse Searches

The radio buttons of either **Find** or **Browse** are available if you are performing a heading or call number search. Selecting Find or Browse affects the search results received.

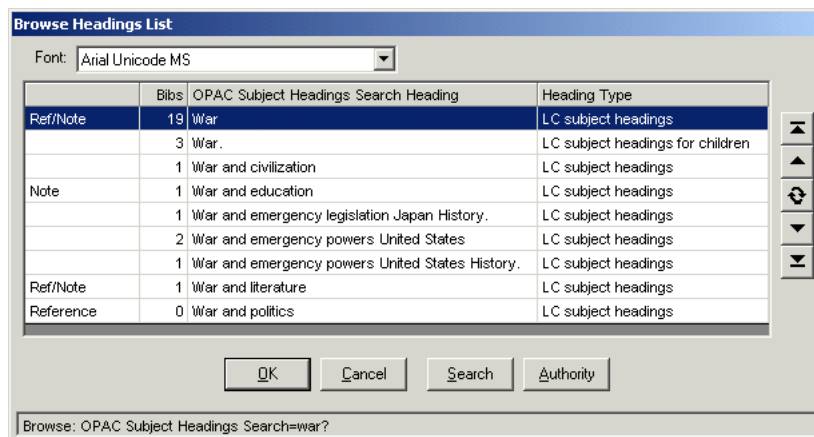
A Find search returns specific, finite results that match the search criteria. For example, a Find subject heading search (OPAC Subject Headings Search) for **war?** returns the results shown in [Figure 3-19](#).

Ref/Note	Bibs	OPAC Subject Headings Search Heading	Heading Type
	19	War	LC subject headings
	3	War.	LC subject headings for children
	1	War and civilization	LC subject headings
Note	1	War and education	LC subject headings
Reference	0	War and emergency legislation	LC subject headings
	1	War and emergency legislation Japan History.	LC subject headings
Reference	0	War and emergency powers	LC subject headings
	2	War and emergency powers United States	LC subject headings
	1	War and emergency powers United States History.	LC subject headings

343 Headings Found      Search: OPAC Subject Headings Search=war?

**Figure 3-19.** Search results after doing a find subject heading search for war?

The Browse search allows users to scroll through an institution's list of headings. For example, a Browse subject heading search (OPAC Subject Headings Search) for **war?** returns the results shown in [Figure 3-20](#).



**Figure 3-20. Search results after doing a browse subject heading search for war?**

In this example, the system displays the **Browse Headings List** that users can scroll through using the arrow buttons ([Table 3-9](#)) to find the wanted heading.

### Heading Searches by Call Number

When doing an Index Selection search by call number, Voyager accepts Dewey call numbers that have more than one decimal point as well as call numbers that only have a decimal point after the Dewey root/Cutter combination such as 305.1 M887 no.2 and 506 N56 v.8. Also, normalization of Dewey call numbers including dates was adjusted to ensure proper sorting in call number indexes such as 321 A65 1998.

Regarding the display of call numbers with 852 $\pm$ k and 852 $\pm$ m (call number prefix and suffix) fields, you can include prefixes and suffixes in all of Voyager's call number displays.

When you perform a Browse search for a call number with a prefix or a suffix, you see the prefix or suffix in the results list as well as in the actual record itself.

### Headings Keyword Searches

The **Keyword** radio button is active on the **Index Selection** tab when the following indexes are selected from the drop-down list.

- OPAC Name Headings Search
- OPAC Title Headings Search
- OPAC Name/Title Search

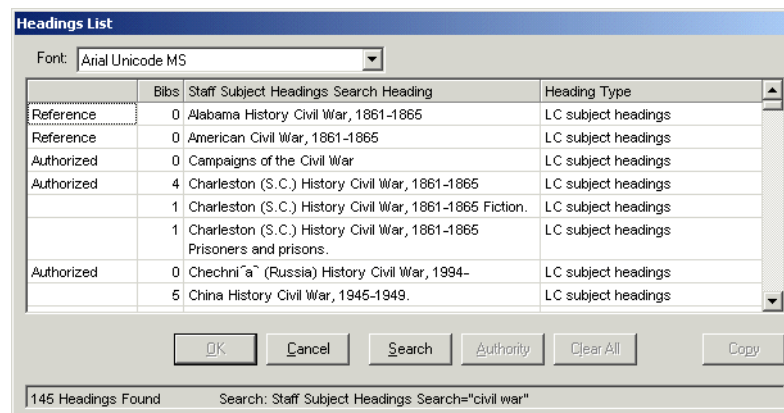
- OPAC Subject Search

Consistent with all headings searches, the **Limit** button is disabled when a headings index is selected from the drop-down list.

Command line syntax may be used with headings keyword searches. Boolean operators such as **and**, **or**, or **not** should be used to combine search strings.

Search terms in quotation marks are searched as a phrase. For example, "**civil war**" is not the same search as **civil AND war**.

Search results display in the Headings List dialog box without relevance ranking. See [Figure 3-21](#). The headings are ordered alphabetically by normal heading.



**Figure 3-21. Headings List for Headings Keyword Search**

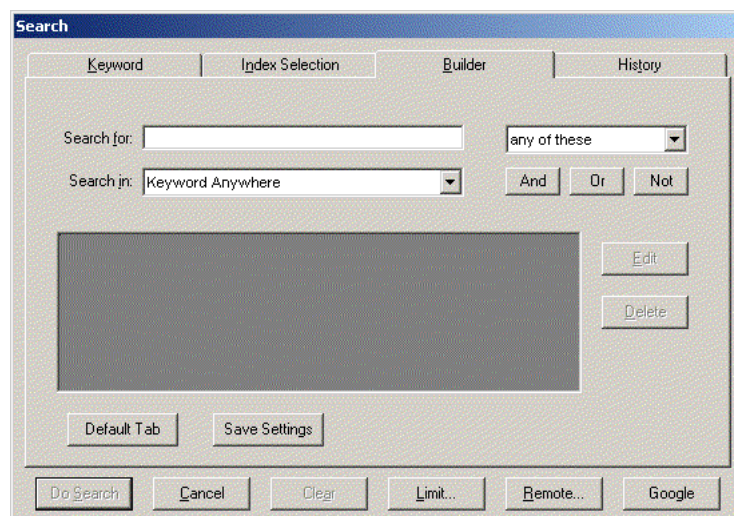
Headings Keyword Searches are not available on the **Builder** tab.

### Builder Tab and Builder Searching

The **Builder** tab of the **Search** dialog box allows you to build complex searches using multiple fields, search terms, and Boolean operators.

Builder searches are Keyword searches. Therefore, limits can be applied. See [Search Limits](#) on [page 3-56](#).

[Figure 3-22](#) shows the **Builder** tab of the **Search** dialog box.



**Figure 3-22. Builder tab of the Search dialog box**

[Table 3-4](#) describes the **Builder** tab.

**NOTE:**

An (R) in the first column of the table designates a required entry. Unless otherwise specified, characters can be alphabetic or numeric, uppercase and/or lowercase, and may include punctuation and spaces.

**Table 3-4. Description of the Builder tab**

Name	Description
Search for (R)	<p>Enter your search term(s) or phrase in the <b>Search for</b> field (1-149 characters).</p> <p>Wildcard characters are as follows.</p> <ul style="list-style-type: none"> <li>• ? (question mark) Use the question mark for multiple-character, wildcard searches at the beginning, middle, or end of your search terms.</li> <li>• % (percent sign) Use the percent sign for single-character wildcard searches.</li> </ul> <p><b>NOTE:</b> Wildcard characters are not available for use with Z39.50 searches.</p>

Table 3-4. Description of the Builder tab

Name	Description
Search term options drop-down list	<p>Unlabeled drop-down menu allowing the operator to determine how to search. Values are preset by the system.</p> <ul style="list-style-type: none"> <li>• <b>Any of these</b> places an implied <b>or</b> between the search terms.</li> <li>• <b>All of these</b> places an implied <b>and</b> between terms.</li> <li>• <b>As a phrase</b> searches an if the terms are placed in quotes.</li> </ul>
Search in	<p>Drop-down menu of keyword search types.</p> <p>Values are preset by the system and user-defined Keyword indexes.</p> <p><b>NOTE:</b> MFHD keyword index searching and Journal index searching are not available in builder searching because they cannot be combined with bibliographic keyword indexes. The Journal index is a title keyword search with a journal type limit applied to it.</p>
Boolean buttons	Use the <b>And</b> , <b>Or</b> , or <b>Not</b> buttons to conduct a boolean search with additional search criteria.
Search terms	Unlabeled box containing your search terms and, if used, accompanying Boolean operators.
Edit	Allows you to edit any search term or phrase you select from the unlabeled search term box.
Delete	Deletes any selected search term from the unlabeled search term box.
Default Tab	<p>Identifies which tab displays as the default when the Search function is initiated.</p> <p>This button is inactive on the tab selected as the default.</p> <p>At installation, the <b>Index Selection</b> tab is the default.</p> <p>This option is available on the following tabs: <b>Keyword</b>, <b>Index Selection</b>, and <b>Builder</b>.</p> <p><b>NOTE:</b> This button does not display when <b>Retain Last Search</b> is selected.</p>

**Table 3-4. Description of the Builder tab**

Name	Description
Save Settings	<p>Saves values on the current search tab.</p> <p>The search code for the index is saved.</p> <p>The saved settings display each subsequent time this tab is accessed.</p> <p>To change settings, enter new values on the tab and click <b>Save Settings</b>.</p> <p><b>NOTE:</b> When the index is deleted, the index code is changed, or it is suppressed, a standard error message is displayed. When the user responds by clicking <b>OK</b>, the default setting is cleared and the first index in the list and the first connector display.</p> <p>This option is available on the following tabs: <b>Index Selection</b> and <b>Builder</b>.</p> <p><b>NOTE:</b> This button does not display when <b>Retain Last Search</b> is selected.</p>
Do Search	Executes the search.
Cancel	Cancels the search.
Clear	Deletes the search term(s) in the <b>Search for</b> field.
Limit	<p>Opens the <b>Search Limits</b> dialog box.</p> <p><b>NOTE:</b> The <b>Limits</b> button is not available for Heading searches.</p> <p>See <a href="#">Search Limits</a> on <a href="#">page 3-56</a>.</p>
URI Search	<p>If configured, this button invokes a user-defined URI (Uniform Resource Identifier) to search outside the Voyager database.</p> <p>See <a href="#">User-Defined Alternate Search Button</a> on <a href="#">page 3-55</a>.</p>

Results from Builder searches display in the **Titles Index** dialog box, see [Titles Index Dialog Box](#) on [page 3-31](#).

## History Tab

The **History** tab (Figure 3-23) gives you access to all searches you performed during the current session. For each search you performed, it lists the search parameters and the number of records returned (**#Hits**).

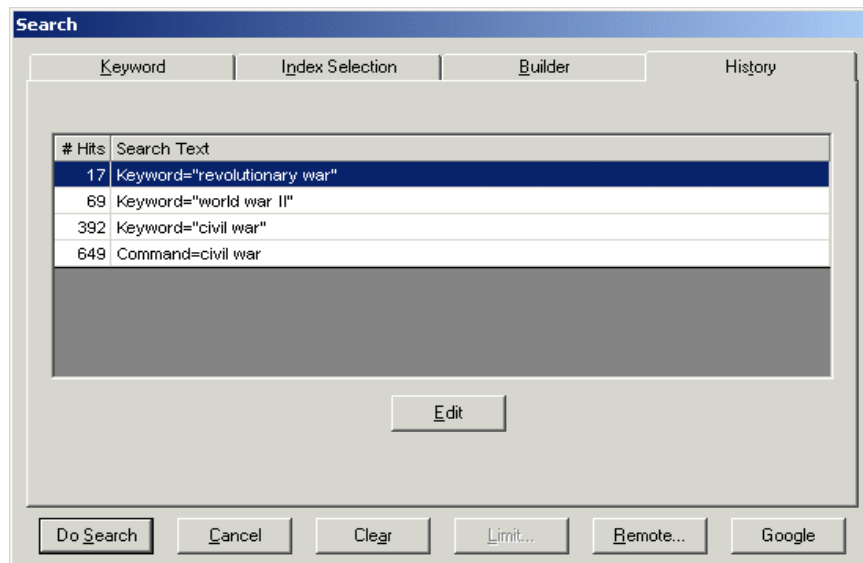


Figure 3-23. History tab of the Search dialog box

From the **History** tab, you can re-execute searches previously performed or edit previous search statements.



### IMPORTANT:

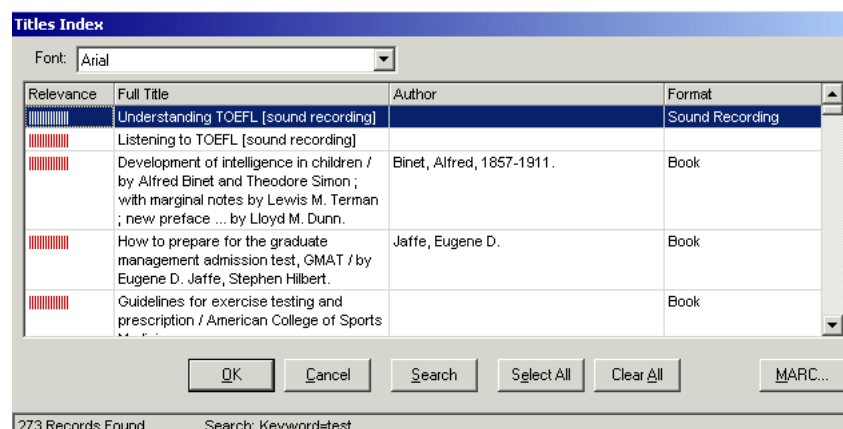
*The **History** tab does not retain information about search limits. If you re-execute or edit a search from the **History** tab, any current limits in effect are used instead of any limits you previously specified.*

## Titles Index Dialog Box

The **Titles Index** dialog box (Figure 3-24) displays the results of Keyword searches, whether conducted from the **Keyword** tab (a Boolean or Free Text search) or the **Builder** tab, and the results of left-anchored searches conducted from the **Index Selection** tab.

**NOTE:**

The maximum number of records returned is 10,000.



**Figure 3-24. Titles Index dialog box**

By default the **Titles Index** dialog box displays the following. (See [Search Results List Re-Sort Options](#) on [page 3-33](#) for a description of sort options for displaying **Titles Index** results.)

- Relevance column (for free text searches)
- Title
- Author
- Date

The title, author, and date columns can be reconfigured to display other bibliographic data. These columns are configured on the **Search Results** tab when defining indexes in the System Administration module. See the *Voyager System Administration User's Guide* for more information.

**NOTE:**

If your search retrieves more than 100 titles, a **Stop** button becomes active. You can then click the **Stop** button to cancel the retrieval of more records ([Figure 3-25](#)).





**Figure 3-25. Stop button seen with more than 100 search results**

See [Table 3-5](#) for a description of the **Titles Index** dialog box.

**Table 3-5. Description of the Titles Index dialog box**

Name	Description
Font	Select the font used to display text in the <b>Titles Index</b> dialog box.  <b>NOTE:</b> These boxes display the Unicode character set in all Voyager modules.
Sort By	Displays drop-down list of options to re-sort search results. See <a href="#">Search Results List Re-Sort Options</a> on <a href="#">page 3-33</a> .
Relevance Column	Displays relevance bars for Free Text searches.
Bibliographic Information Column(s)	Columns containing bibliographic information (for example, full title, author, and format).  These are specified when defining searches in the System Administration module.
OK	After clicking the <b>OK</b> button, the response of the system varies depending on the type of search conducted.  See <a href="#">Keyword Searching in the Circulation Module</a> on <a href="#">page 3-74</a> .
Cancel	Closes the <b>Titles Index</b> dialog box.
Search	Returns to the <b>Search</b> dialog box cleared of previous entries unless the <b>Retain Last Search</b> check box is selected in session preferences.

### **Search Results List Re-Sort Options**

The following options are available for re-sorting a search results list.

- Author
- Publish Date
- Publish Date Descending
- Relevance (if used for the search)
- Title
- Search results column headers such as Format, for example  
(depending on the [Global Log] settings in the `Voyager.ini` file; see [Re-Sort Configuration Options](#) on [page 3-35](#) for more information)

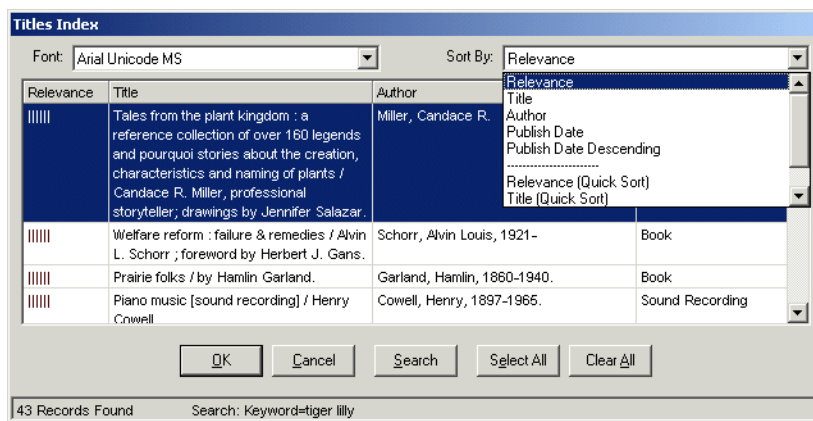
See [Figure 3-26](#).

These options display when a non-headings search is performed against the local database or a single remote Voyager database.

Click one of the options from the **Sort By** drop-down list to execute a new sort.

Optionally, you may click a column heading to invoke a Quick Sort of the search results list using the column data. See [Re-Sort Configuration Options](#) on [page 3-35](#) for more details of configurable options.

Selecting a Quick Sort value once re-sorts the list in ascending order based on the value selected. Selecting the same Quick Sort value a second time re-sorts the list in descending order. This applies to the Quick Sort capability selectable from both the **Sort By** drop-down list and by clicking a column heading when configured for sort options use. See [Re-Sort Configuration Options](#) on [page 3-35](#) for more information.



**Figure 3-26. Search results sort options**

## Re-Sort Configuration Options

The **Sort By** options that display in the **Titles Index** dialog box are determined by sort options configured in the [Global Log] stanza in the `Voyager.ini` file. The configurable sort options are as follows.

- `ServerSortList=Y/N`
- `ASCIISortList=Y/N`
- `ASCIISortColumn=Y/N`

See the *Voyager Technical User's Guide* for more information regarding configuring the [Global Log] stanza in the `Voyager.ini` file.

See [Table 3-6](#) for the system default when no options are configured in the [Global Log] stanza.

**Table 3-6. Default Re-Sorting Options (when none are configured)**

Option	Variable
ServerSortList	Y
ASCIISortList	N
ASCIISortColumn	N

### ServerSortList

When **`ServerSortList=Y`** is implemented, the sort function utilizes Voyager indexes that follow certain rules to handle punctuation and other non-alphanumeric characters that exist in a MARC record. For example, O'Connor becomes OConnor.

When one of the following **Sort By** options is selected from the drop-down list (see [Figure 3-26](#)), the system automatically executes a Voyager search on the server and displays new search results based on the sort order selected.

- Author
- Publish Date
- Publish Date Descending
- Relevance (if used for the search)
- Title

### **ASCIISortList**

When **ASCIISortList=Y** is implemented, the system does an alphabetic sort with diacritics removed using Visual Basic on the client to process the existing search results list into the new sort order determined by the selection of one of the following **Sort By** options (below the line).

- Relevance (Quick Sort)
- Title (Quick Sort)
- "Column Heading Name" (Quick Sort)  
such as Format (Quick Sort)

This method is faster because it does not re-execute the search query against Voyager indexed data on the server. Instead, it uses facilities on the client to process the sort. As a result, for example, leading articles are considered part of the data to sort versus ignored data as in a Voyager server sort.

### **ASCIISortColumn**

When **ASCIISortColumn=Y** is implemented, the system does an alphabetic sort with diacritics removed using Visual Basic on the client to process the existing search results list into the new sort order determined by the selection (mouse click) of one of the column headings.

This method is faster because it does not re-execute the search query against Voyager indexed data on the server. Instead, it uses facilities on the client to process the sort. As a result, for example, leading articles are considered part of the data to sort versus ignored data as in a Voyager server sort.

#### **NOTE:**

The Quick Sort facility may be accessed through either of the following methods when the appropriate configuration is implemented in the [Global Log] stanza.

- Click the column heading for the desired sort
- Select one of the Quick Sort (below the line) options from the **Sort By** drop-down list

### **Considerations for Re-sorting Search Results**

The following list highlights some considerations.

- When a re-sort is executed, the original sort order is lost except when relevance is used.

- If a search result is truncated to a maximum of 10,000 results, the re-sort option retrieves different results than the original set since the sort order by value is different.

The re-sort drop-down list options only display with bibliographic result sets that display a list of titles. The following are examples of types of searches that provide re-sort options.

- Keyword, Index Selection, or Builder searches
- Keyword searches with relevance and without relevance
- MFHD keyword searches
- Command line searches with relevance and without relevance
- Date searches
- Find searches
- Left-anchored, non-headings searches
- Selections on headings lists of headings with multiple titles

The **Sort By** drop-down list does not display with bibliographic results sets meeting any of the following criteria.

- A list of headings
- Browse searches
- Remote Z39.50 connections
- Remote connections to non-Voyager catalogs
- Remote connections to multiple Voyager catalogs

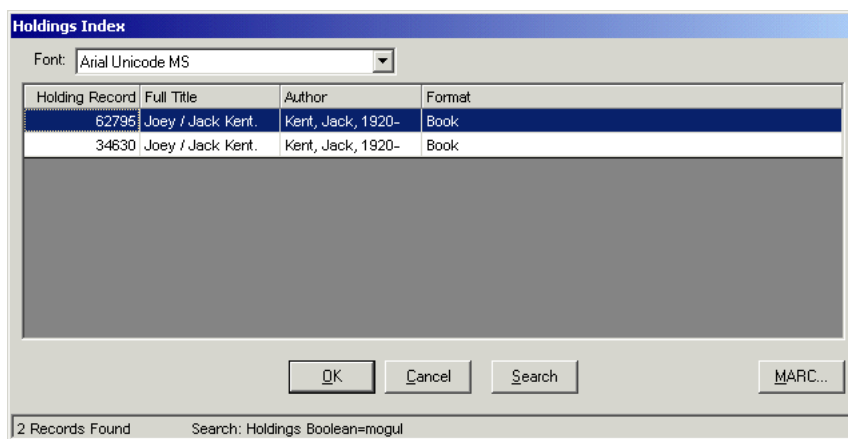
## **Holdings Index Dialog Box**

---

The **Holdings Index** dialog box ([Figure 3-27](#)) returns results of a Holdings Boolean search conducted from the **Keyword** tab.

**NOTE:**

The maximum number of records returned is 10,000.



---

**Figure 3-27. Holdings Index dialog box**

The **Holdings Index** dialog box displays the following:

- Holdings Record ID
- Title
- Author
- Date

The title, author, and date columns can be re-configured to display other bibliographic data on the **Holdings Index** dialog box. These columns are configured on the **Search Results** tab when defining indexes in the System Administration module. See the *Voyager System Administration User's Guide* for more information.

**NOTE:**

If your search retrieves more than 100 titles, a **Stop** button becomes active. You can then click the **Stop** button to cancel the retrieval of more records ([Figure 3-25](#)).



---

**Figure 3-28. Stop button seen with more than 100 search results**

See [Table 3-7](#) for a description of the **Holdings Index** dialog box.

**Table 3-7. Description of the Holdings Index dialog box**

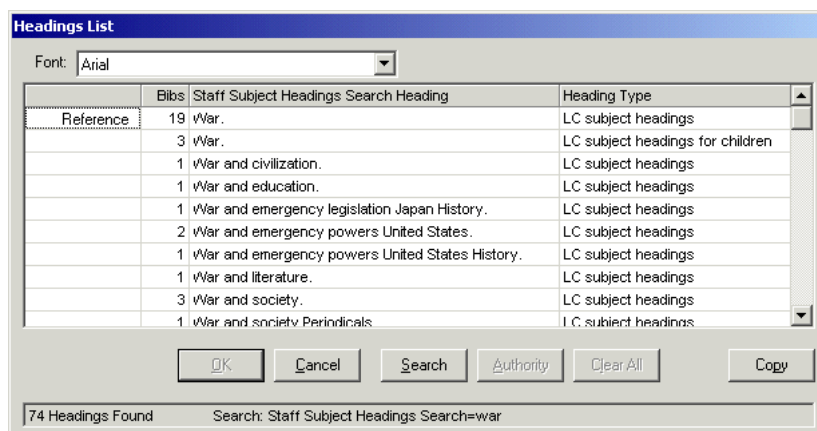
Name	Description
Font	Select the font used to display text in the <b>Holdings Index</b> dialog box.  <b>NOTE:</b> These boxes display the Unicode character set in all Voyager modules.
Holdings Record Column	Displays the holdings record ID for holdings keyword searches.
Bibliographic Information Column(s)	Columns containing bibliographic information (for example, full title, author, and format).  These are specified when defining searches in the System Administration module.
OK	After clicking the <b>OK</b> button, the response of the system varies depending on the type of search conducted.  See <a href="#">Keyword Searching in the Circulation Module</a> on page 3-74.
Cancel	Closes the <b>Holdings Index</b> dialog box.
Search	Returns to the <b>Search</b> dialog box cleared of previous entries unless the <b>Retain Last Search</b> check box is selected in session preferences.

## Headings List Dialog Box

Results of Index Selection headings searches display in a **Headings List** dialog box ([Figure 3-29](#)).

**NOTE:**

A left-anchored or non-headings search from the **Index Selection** tab returns results in a **Titles Index** dialog box. See [Titles Index Dialog Box](#) on [page 3-31](#).



**Figure 3-29. Headings List dialog box**

In a **Headings List** dialog box, you can view the following.

- References
- Ref/Notes
- Notes/Scope Notes
- Narrower terms
- See and/or See Also reference(s) associated with the heading

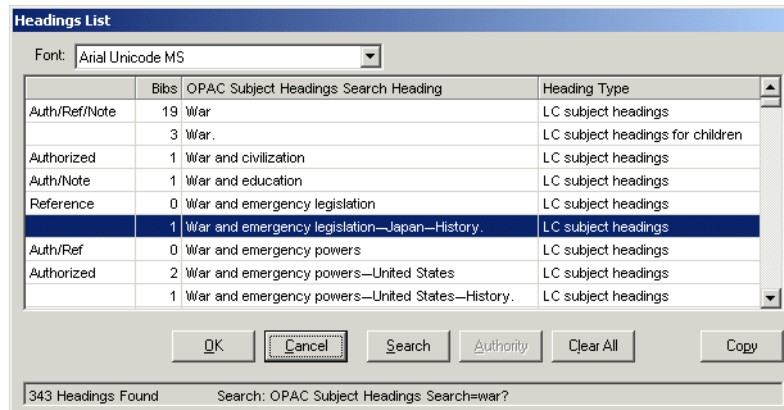
See [Table 3-8](#) for a description of associated Headings List information.

**Table 3-8. Headings List Information**

Type	Description
Authorized	This term displays if the heading is in the <b>1XX</b> field of the authority record.
Reference	This term displays if the heading is not an authorized heading but is a <i>see from</i> reference from the <b>4XX</b> fields.
Auth/Ref	This term displays if the heading is in the <b>1XX</b> in an authority record and has references ( <b>5XX</b> fields) in that same record and/or is itself a cross-reference in another authority record.
Note	This term displays if the heading's authority record contains scope notes.



Optionally, headings with subdivisions display with dashes. See [Figure 3-30](#). To implement the display of dashes for headings with subdivisions, see the description of System>Miscellaneous options in the *Voyager System Administration User's Guide*.



**Figure 3-30. Optional dashes for headings with subdivisions**

**NOTE:**

If your search retrieves more than 100 headings, the **Stop** button becomes active. You can then click the **Stop** button to cancel the retrieval of more headings ([Figure 3-31](#)).



**Figure 3-31. Stop button seen with more than 100 search results**

[Table 3-9](#) describes the **Headings List** dialog box containing the search results.

**Table 3-9. Description of the Headings List dialog box**

Name	Description
Font Drop-down	Select the font used to display text in the <b>Headings List</b> dialog box.  <b>NOTE:</b> These dialog boxes display the Unicode character set in all Voyager modules.
[additional references]	Unlabeled column identifying if there are References, Ref/Notes, Notes as well as Scope Notes, Narrower terms, See and/or See Also reference(s).
Bibs Column	Number of bibliographic records associated with this heading.
Heading Column	Name of the Heading returned.
Heading Type Column	Type of heading returned.
OK Button	Active once a heading is selected.  Opens the <b>Titles Index</b> dialog box if there are bibliographic records associated with the heading.  See <a href="#">Titles Index Dialog Box</a> on <a href="#">page 3-31</a> .
Cancel Button	Closes the <b>Headings List</b> .
Search Button	Opens the <b>Search</b> dialog box.
Authority Button	Opens the <b>Reference Information</b> dialog box. Active if there is a Ref/Note, Reference, or Note, and so on.  See <a href="#">Reference Information Dialog Box</a> on <a href="#">page 3-42</a> .
Clear All Button	Clears the selected headings. This button is not active in the Circulation module.

### **Reference Information Dialog Box**

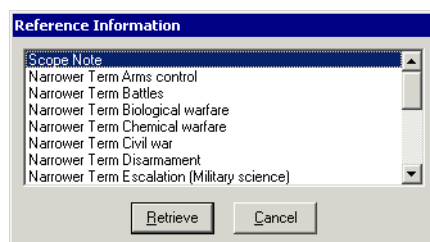
---

Additional Reference Information can be displayed for titles that display the following in the **Headings List** dialog box.

- Authorized
- Reference
- Note

- Ref/Note

By clicking the **Authority** button or right clicking the row, the **Reference Information** dialog box opens ([Figure 3-32](#)).



**Figure 3-32. Reference Information dialog box**

This dialog box lists whether authority record information is available as well as Scope Notes, Narrower terms, See and/or See Also reference(s) for the selected heading.

**NOTE:**

Multiple Scope Notes display in the order in which they occur in the MARC record.

The **Reference Information** dialog box displays information in order by type of reference and then alphabetically by heading text. The reference types should be ordered as follows.

1. Authorized Record
2. Scope Note
3. See Reference
4. Earlier Heading
5. Acronym
6. Musical Composition
7. Broader Term
8. Narrower Term
9. See Also Reference

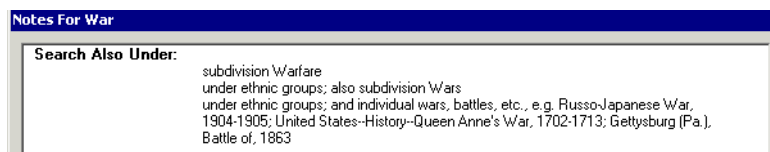
To retrieve information about one of the references, select the appropriate reference and click the **Retrieve** button.

**NOTE:**

When the headings are retrieved from the server, they are normalized using the standard authority normalization rules to ensure that the alphabetic sort returns the headings in the proper order.

**Scope Notes**

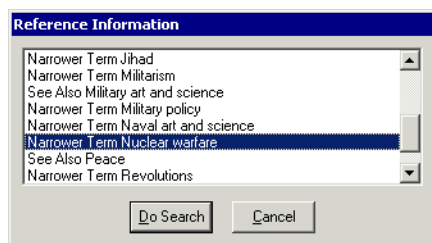
Retrieve the scope notes for the heading by selecting it and clicking the **Retrieve** button ([Figure 3-33](#)).



**Figure 3-33. Scope Notes for a heading**

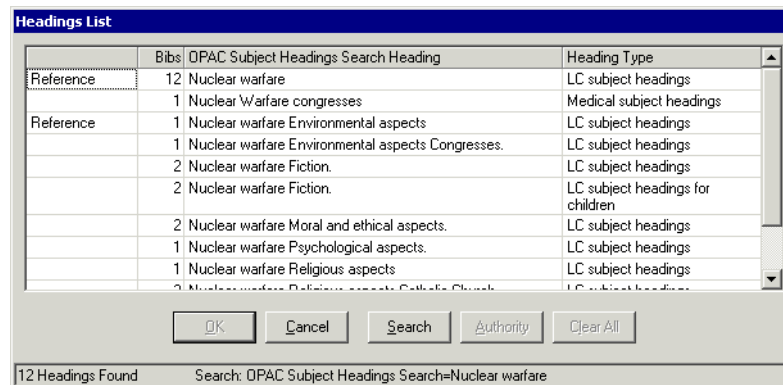
**Narrower Term**

Find a narrower term by selecting it and clicking the **Do Search** button. See [Figure 3-34](#).



**Figure 3-34. Narrower term for a heading**

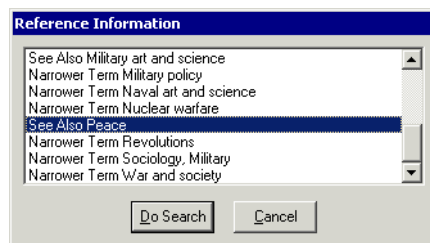
The system does a new search for the narrower term. See [Figure 3-35](#).



**Figure 3-35. Search results from the narrower term**

### See Also

From the **Reference Information** dialog box, the operator can do a new search for the see also term by selecting it and clicking the **Do Search** button. See [Figure 3-36](#).



**Figure 3-36. See Also for a heading**

The system then does a new search for the see also term. [Figure 3-37](#) displays the search results of the See Also term.

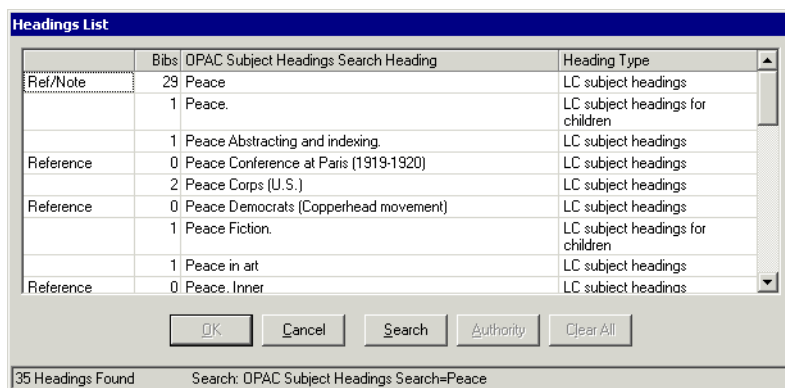


Figure 3-37. See Also search results

### Select one or more authority records Dialog Box

The **Select one or more authority records** dialog box displays when an Authorized record is selected from the **Headings List** dialog box or when an Authority Record is selected and you click **Retrieve** from the **Reference Information** dialog box. See [Figure 3-38](#).

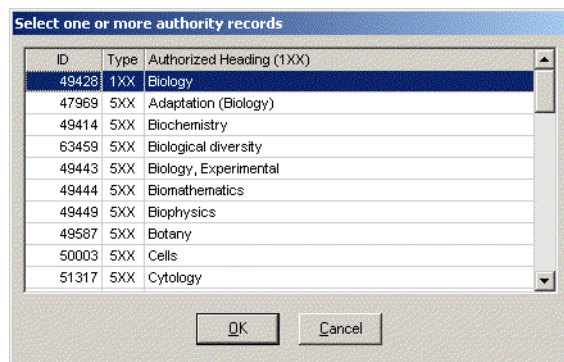


Figure 3-38. Select one or more authority records dialog box

The records in the **Select one or more authority records** dialog box sort by tracing tag of the reference such as 4XX and 5XX and then alphabetically by heading within each tracing type.

**NOTE:**

Headings are deduped prior to being displayed on the **Select one or more authority records** dialog box. Therefore, fewer entries display in this dialog box than the actual count of headings.

## **Perform a Keyword Search**

---

The procedure for performing a keyword search in the Voyager modules is shown in [Procedure 3-5, Performing a keyword search](#).



### **Procedure 3-5. Performing a keyword search**

---

Use the following to conduct a keyword search.

1. From the **Search** dialog box, click the **Keyword** tab.

Result: The **Keyword** tab opens (see [Description of the Keyword tab](#) on [page 3-17](#) for more information).

2. Select the wanted search option, either the **Boolean** radio button, the **Free Text** radio button, or the **Holdings Boolean** radio button.
3. Enter your search term(s) or phrase(s).

Result: The search can now be executed (see [Figure 3-39](#)).

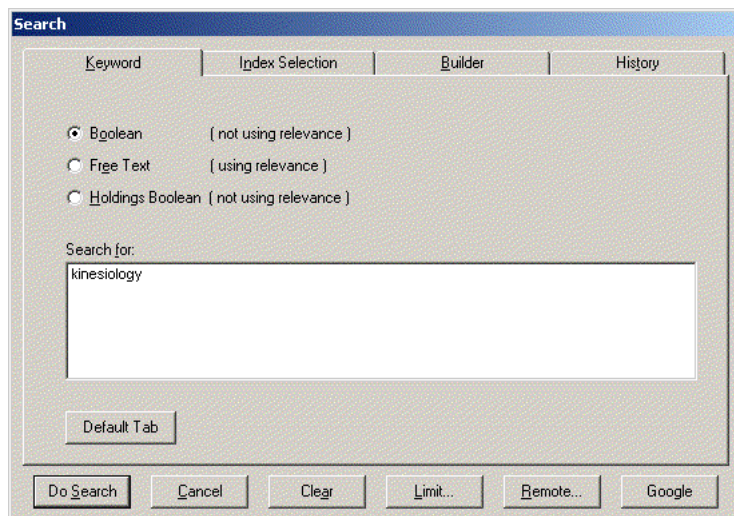


Figure 3-39. Completed Keyword tab

4. Select **Do Search** to execute the search, **Cancel** to cancel the search, **Clear** to delete the search terms, or **Limit** to set limits for this search. See [Setting Search Limits](#) on [page 3-67](#).

Result: If the above search is performed, a **Titles Index** dialog box opens with the results (see [Figure 3-40](#)).

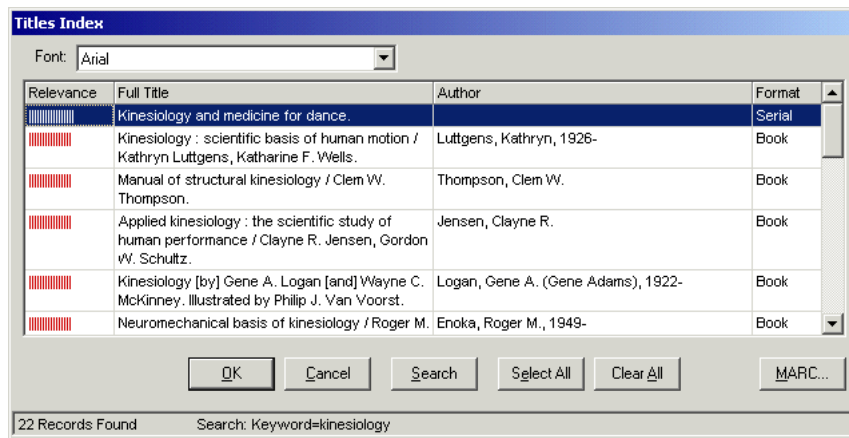
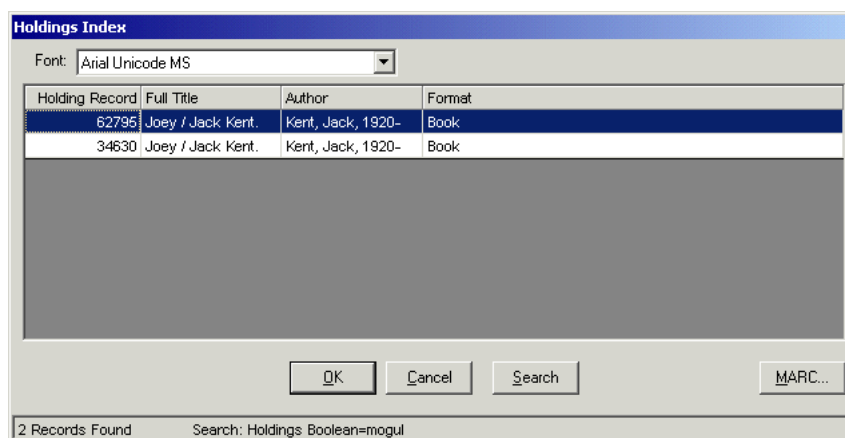


Figure 3-40. Titles Index dialog box after performing a free text keyword search



If a Holdings Boolean search has been conducted the **Holdings Index** dialog box shows the results (see [Figure 3-41](#)).



**Figure 3-41. Holdings Index dialog box**

5. Select the title or holdings record you want and select one of the option buttons. See [Description of the Titles Index dialog box](#) on [page 3-33](#) for information.

Result: If the **OK** button is clicked, the response of the system varies depending on the type of search conducted.

See [Keyword Searching in the Circulation Module](#) on [page 3-74](#).

## Perform an Index Selection Search

The procedure for performing an Index Selection search is shown in [Procedure 3-6, Index Selection Searching](#).

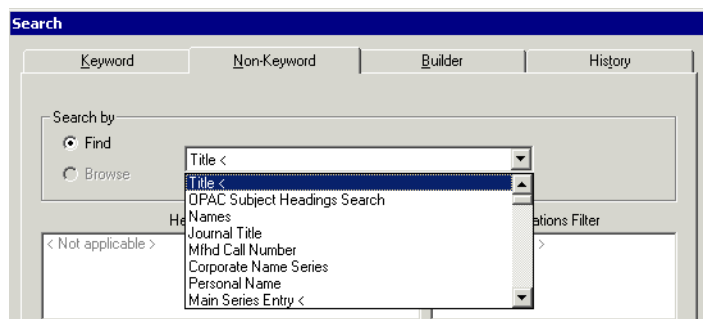


### Procedure 3-6. Index Selection Searching

Use the following to perform an Index Selection search.

1. Access the **Search** dialog box and click the **Index Selection** tab.

2. Select the type of search wanted from the drop-down menu (see [Figure 3-42](#)).



---

**Figure 3-42. Type of search**

**OPTIONAL:**

3. Select an option button of either **Find**, or **Browse** if you are performing a heading or call number search.

**OPTIONAL:**

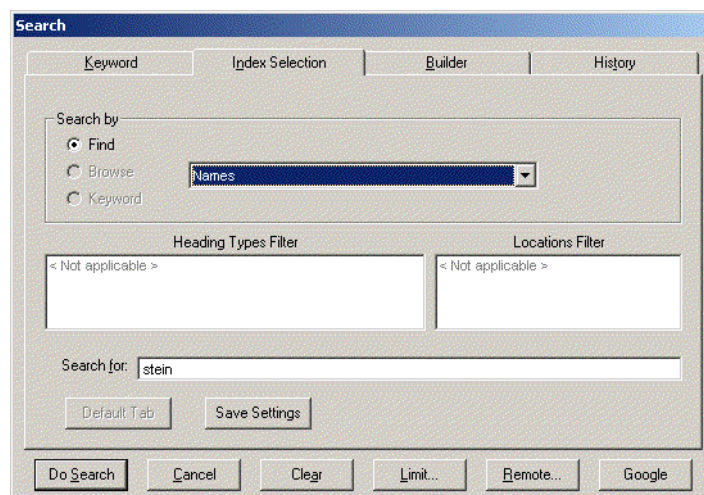
4. Select a *Heading Types Filter* (if doing a heading or call number search). Hold the **Ctrl** key down to select more than one filter.

**OPTIONAL:**

5. Select a *Locations Filter* (if applicable) from the list box(es). Hold the **Ctrl** key down to select more than one filter.

**OPTIONAL:**

6. Click the **Limits** button to display the **Search Limits** dialog box and further limit your search. See [Search Limits](#) on [page 3-56](#).
7. Enter your search term in the **Search For** field (see [Figure 3-43](#)).



**Figure 3-43. Completed Index Selection tab**

8. Click the **Do Search** button to perform the search.

Result: If you performed a Non-Heading search, the **Titles Index** dialog box shows matching titles.

If you performed a Heading search, the **Headings List** dialog box shows all matching headings. Click the heading that most closely matches what you are searching for, then click the **OK** button (or double-click the heading.) The **Titles Index** dialog box then shows the matching titles. See [Titles Index Dialog Box](#) on [page 3-31](#).

9. Click the item you want to select it in the **Titles Index** dialog box and click **OK**. Optionally, double-click the title to select it.



**TIP:**

*To view the MARC record for the item, click the **MARC...** button.*

Result: If the **OK** button is clicked, the response of the system varies depending on the type of search conducted.

See [Index Selection Searching in the Circulation Module](#) on [page 3-80](#).

## Perform a Builder Search

---

The procedure for Performing a Builder search is shown in [Procedure 3-7, Performing a Builder search](#).



### Procedure 3-7. Performing a Builder search

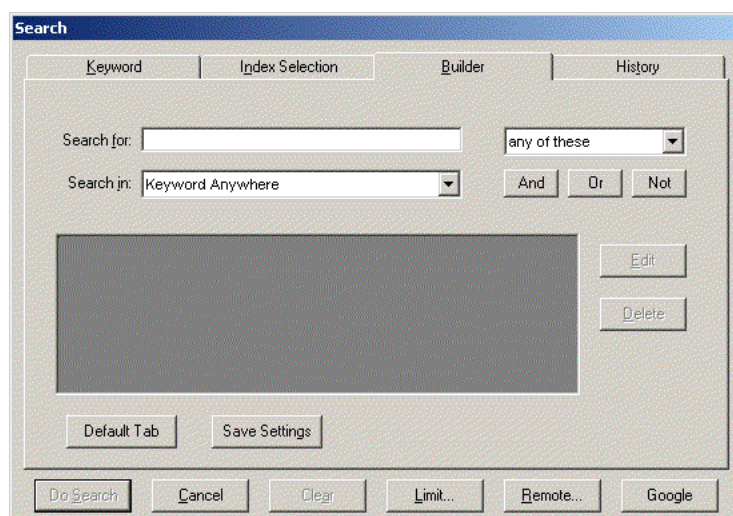
---

Use the following to perform a Builder search.

1. Click the **Builder** tab from the **Search** dialog box.

Result: The **Builder** tab opens (see [Figure 3-44](#)).

---



---

**Figure 3-44. Builder search tab**

2. Enter a search term(s) or phrase(s) in the **Search for** field.
3. Select the “any,” “all,” or “phrase” option from the drop-down list to the right of the **Search for** field. See [Description of the Builder tab](#) on [page 3-28](#) for a description of the options.
4. Select a **Search In** field for matching the search terms.

**OPTIONAL:**

5. Click any of the Boolean operator buttons, **And**, **Or**, or **Not**, to use multiple search rows. Repeat steps 3 - 5.

Result: The row of search terms displays in the pane below the **Search In** field.

**NOTE:**

The Boolean operator does not display in the row until you enter another search term and click an additional Boolean operator button (to be used with the next search term, if you enter another).

[Figure 3-45](#) shows a search using multiple search terms in combination with the following.

- All three options for relationships between terms (any, all, phrase)
- Various **Search In** fields (**Title**, the default **Keyword Anywhere**, **Subject**, and **Author Name**)
- Two Boolean operators (**AND** and **OR**)

The screenshot shows the 'Search' window with the 'Builder' tab selected. The 'Search for:' field is empty, and the 'Search in:' dropdown is set to 'Keyword Anywhere'. The 'any of these' dropdown is also visible. The main area displays a list of search terms and Boolean operators: '(lake AND effect) [in Title] AND', '"lake michigan" AND', '(snow OR rain OR weather) [in Subject] OR', and 'smith [in Author Name]'. The 'smith [in Author Name]' term is highlighted. To the right of the list are 'Edit' and 'Delete' buttons. At the bottom of the window are buttons for 'Default Tab', 'Save Settings', 'Do Search', 'Cancel', 'Clear', 'Limit...', 'Remote...', and 'Google'.

**Figure 3-45. Builder tab with multiple search terms and relationships**

**OPTIONAL:**

6. *Edit any row of search terms by clicking the row, then the **Edit** button, then repeating steps 3 - 5.*

*Delete any row of search terms by clicking the row, then clicking the **Delete** button.  
Delete the entire pane by clicking the **Clear** button.*

**OPTIONAL:**

7. *Click the **Limits** button to display the **Search Limits** dialog box and further limit your search. See [Search Limits](#) on [page 3-56](#).*
8. *To search, click the **Do Search** button. (To cancel and close the **Search** dialog box, click the **Cancel** button.)*

Result: The **Titles Index** or **Headings List** displays the results of the search.

See [Builder Searching in the Circulation Module](#) on [page 3-84](#).

---

## **Access/Review the History Tab**

---

The procedure for accessing searches from the **History** tab is shown in [Procedure 3-8, Accessing searches from the History tab](#).



### **Procedure 3-8. Accessing searches from the History tab**

---

Use the following to access a search from the **History** tab.

1. Click the **History** tab from the **Search** dialog box.

Result: The list of previous searches displays.

2. Click the row of the search you want to access.

Result: The row highlights.

**OPTIONAL:**

3. *Click the **Limits** button.*

Result: The **Search Limits** dialog box displays. For information about setting limits. See [Search Limits](#) on [page 3-56](#).

**OPTIONAL:**

4. Click the **Edit** button.

Result: The correct tab opens on the **Search** dialog box and you can edit and re-execute the search from there.

5. Click the **Do Search** button.

Result: This executes the previous search that you selected.

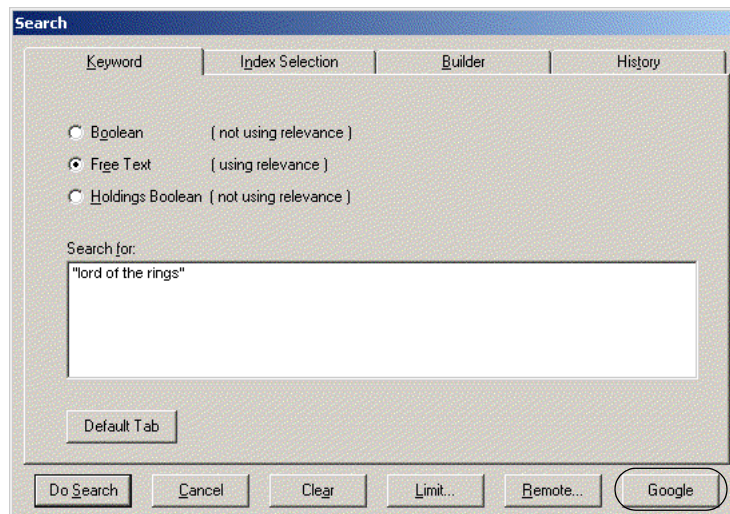
---

## User-Defined Alternate Search Button

---

Users can add another button on the **Search** dialog box, providing the capability to invoke a URI (Uniform Resource Identifier) to search outside the Voyager database.

An example of this user-defined feature is shown in [Figure 3-46](#). The button labeled Google has been set up as a URI search option to access the Google™ search page.



**Figure 3-46.** Search dialog box with user-defined alternate search button

This alternate search function can be configured to do either of the following:

- Take the text string entered in the **Search for** field and pass it to the alternate search facility to execute when you click this uniquely-defined alternate search button
- Access the search facility without including the text string

The URI search option is defined in the `voyager.ini` file. For more information, about the setup for this feature, see the description of the `[SearchURI]` stanza in the *Voyager Technical User's Guide*.

## Setting Search Preferences

---

Users can create session searching defaults to increase their searching efficiency.

### Retain Last Search

---

Selecting the **Retain Last Search** check box causes the search information from your last search to be saved until the current Voyager session is exited. That way, if you want to perform the same search again, you do not have to redefine your search type and text. This check box is found in the **Session Preferences** workspace in the Circulation module.

### Automatic Truncation for Index Selection Searches

---

Selecting the **Automatic Truncation for Index Selection Searches** check box causes an Index Selection search to be automatically truncated without requiring the question mark for a truncation character. This check box is found in the **Session Preferences** workspace in the Circulation module.

## Search Limits

---

Search limits can be applied to the following searches:

- Boolean and Free Text Keyword searches from the **Keyword** tab
- Left-anchored searches from the **Index Selection** tab
- **Builder** tab searches



**IMPORTANT:**

*Limits cannot be applied to the Holdings Boolean (MFHD Keyword), Subject headings, Author headings, or Call Number headings searches.*

Users access the **Search Limits** dialog box to limit searches. Searches can be limited by Language, Location, Date, Medium, Type, Place, or Status.

In a limited search, the system compares the limit criteria selected to the code or value in the corresponding field of the bibliographic record. For example, if a search is limited to the publication date of 1960, the system checks the 008 control field in the MARC bibliographic record, date of publication field ([Figure 3-47](#)) and returns the matching results.

**MARC** | System | History

Leader: 00683nam a2200217 45@0 006

005: 007

008: 721201 s 1960 nyu h \_ \_ b \_ \_ 0 0 0 \_ 0 \_ eng \_ \_

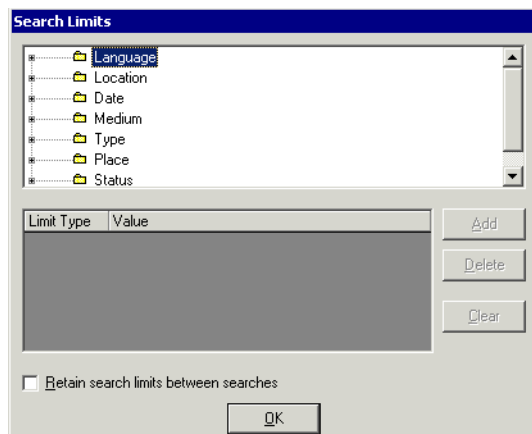
Tag	11	12	Subfield Data
010			\$a 60012583
035			\$a CNV01338516
049			\$a SHCM
050	0		\$a JX1952 \$b .E44
082			\$a 341.1
092			\$a 341.1 E35
100	1		\$a Einstein, Albert, \$d 1879-1955.
245	1	0	\$a Einstein on peace / \$c edited by Otto Nathan and Heinz Norden ; Pref. by Bertrand Russell.

**Figure 3-47. Bibliographic record**

User's can configure the limits available in the **Search Limits** dialog box by configuring the `limits.ini` file. See [Limits.ini File](#) on [page 3-59](#).

### Search Limits Dialog Box

[Figure 3-48](#) shows the **Search Limits** dialog box.



**Figure 3-48. Search Limits dialog box**

[Table 3-10](#) describes the **Search Limits** dialog box.

**Table 3-10. Description of the Search Limits dialog box**

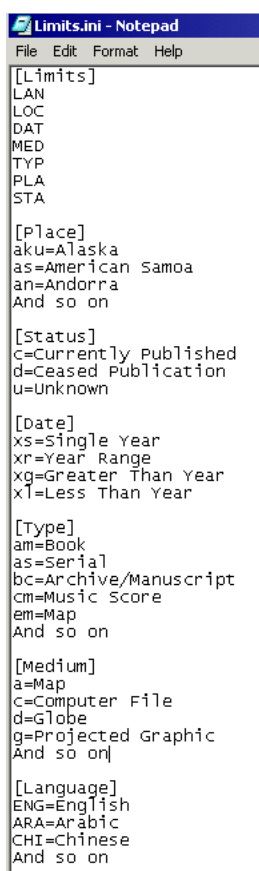
Name	Description
List of Limits	Types of limits that can be imposed.
Limit Type Column	Type of limit selected.
Value	Value of the limit selected.  For example, if a language limit is applied, English is a possible value.
Add Button	Applies the limit selected in the top portion of the dialog box and displays in the bottom portion of the dialog box.
Delete Button	Deletes the selected limit from the bottom half of the dialog box.
Clear Button	Clears the selected limit from the top half of the dialog box.
Retain search limits between searches	Applies the limit(s) to the current search and all future searches.
OK Button	When clicked the system returns to the <b>Search</b> dialog box and the search limits defined are in effect.

## Limits.ini File

Search limits are configured in the `limits.ini` file located in the `c:\Voyager\Misc.` directory on the user's computer. This file contains various stanzas which govern the type of limits available (`[Limits]` stanza), and the limiting criteria (search limits stanzas) seen in the **Search Limits** dialog box. [Figure 3-49](#) provides an example of the `limits.ini` file.

### NOTE:

Use a text editor to edit the `limits.ini` file such as Notepad or Wordpad.



```

Limits.ini - Notepad
File Edit Format Help
[Limits]
LAN
LOC
DAT
MED
TYP
PLA
STA

[Place]
aku=Alaska
as=American Samoa
an=Andorra
And so on

[Status]
C=Currently Published
d=Ceased Publication
u=Unknown

[Date]
xs=Single Year
xr=Year Range
xg=Greater Than Year
xl=Less Than Year

[Type]
am=Book
as=Serial
bc=Archive/Manuscript
cm=Music Score
em=Map
And so on

[Medium]
a=Map
C=Computer File
d=Globe
g=Projected Graphic
And so on

[Language]
ENG=English
ARA=Arabic
CHI=Chinese
And so on

```

**Figure 3-49.** Sample `limits.ini` file

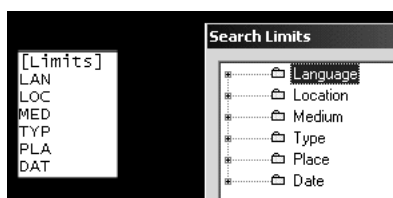
## Limits Stanza

The `[Limits]` stanza defines the type and order of limits available in the **Search Limits** dialog box. It lists a three letter code for each type of limit:

- Language (LAN)
- Location (LOC)
- Date (DAT)
- Medium (MED)
- Type (TYP)
- Place (PLA)
- Status (STA)

If any codes are misspelled or not present, that limit type is not available. Also, the order in which the codes are listed in the stanza is the order in which the limits are listed in the **Search Limits** dialog box.

[Figure 3-50](#) shows a `[Limits]` stanza and the corresponding **Search Limits** dialog box list of limits.



**Figure 3-50.** `[Limits]` stanza and the list of limits in the **Search Limits** dialog box

Also, for each type of limit except the location limit, there is an associated search limit stanza defining the limit criteria. For example, users wanting to limit by medium would include MED in the `[Limits]` stanza, and include a `[Medium]` stanza in the `limits.ini` file.

## Search Limits Stanzas

The search limit stanzas in the `limits.ini` file correspond to the types of limits listed in the `[Limits]` stanza. These provide the limiting criteria for each limit type. The search limits stanzas are as follows:

- `[Language]`
- `[Date]`

- [Medium]
- [Type]
- [Place]
- [Status]

**NOTE:**

Operators may limit by location if LOC is listed in the [Limits] stanza. However since locations are locally defined there is no locations stanza, the list of locations to choose from is derived from the locations defined in the System Administration module, see the *Voyager System Administration User's Guide*.

**Rules for Search Limit Stanzas**

- Stanzas can be in any order in the `limits.ini` file, they do not have to be in the same order as in the [Limits] stanza.
- Users can delete criteria by deleting the line, using the hash mark before the criteria does not work.
- Removing a search limit stanza prevents those limits from being available.
- The [Date] stanza cannot be edited.

**IMPORTANT:**

See the MARC standards for information regarding the MARC Leader, 007, and 008 fields, as well as, the available codes used for languages, status, medium, and places of publication, <http://www.loc.gov/marc/>.

**[Language] Stanza**

Users can limit searches to items published in a particular language by configuring this stanza. Any language you want to limit by must be listed in this stanza.

[Figure 3-51](#) shows an example of part of the [Language] stanza. This stanza is editable and additional languages may be added.

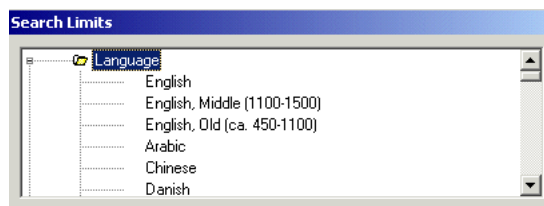
```
[Language]
ENG=English
ENM=English, Middle (1100-1500)
ANG=English, old (ca. 450-1100)
ARA=Arabic
CHI=Chinese
DAN=Danish
DUT=Dutch
DUM=Dutch, Middle (ca. 1050-1350)
FRE=French
FRM=French, Middle (ca. 1400-1600)
FRO=French, old (ca. 842-1400)
GER=German
```

---

**Figure 3-51. Language stanza example**

[Figure 3-52](#) shows some of the language limits that correspond to the [Language] stanza ([Figure 3-51](#)) as they display in the **Search Limits** dialog box.

---



**Figure 3-52. Language limits**

When a language limit is applied, the system compares the language code in the **008 control** field (positions 35-37) of the MARC record with the language selected in the **Search Limits** dialog box to find matching records.

### **[Date] Stanza**

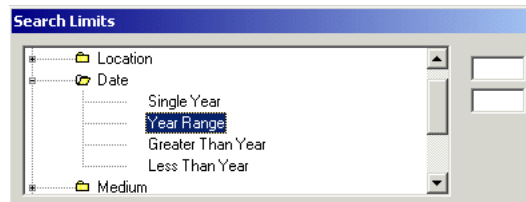
Users can limit searches to items published in a particular year, range of years, or before or after a particular year.

[Figure 3-53](#) shows the [Date] stanza. This stanza is not editable.

```
[Date]
xs=Single Year
xr=Year Range
xg=Greater Than Year
xl=Less Than Year
```

**Figure 3-53. Date stanza example**

[Figure 3-54](#) shows the date limits that correspond to the [Date] stanza ([Figure 3-53](#)) as they display in the **Search Limits** dialog box.



**Figure 3-54. Date limits**

When a date limit is applied, the system compares the date in the **008 control** field (positions 07-10) of the MARC record with the date provided in the **Search Limits** dialog box to find matching records.

### [Medium] Stanza

Users can limit searches to the medium in which the item is published by configuring this stanza. Any medium you want to limit by must be listed in this stanza.

[Figure 3-55](#) shows an example of the [Medium] stanza. This stanza is editable and additional medium limit codes may be added.

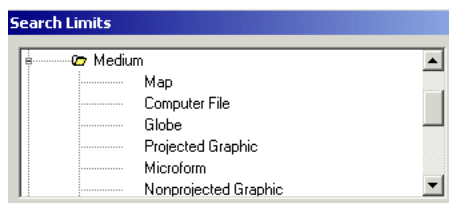
```
[Medium]
a=Map
c=Computer File
d=Globe
g=Projected Graphic
h=Microform
k=Nonprojected Graphic
m=Motion Picture
s=Sound Recording
t=Text (Eye-Readable)
v=videorecording
```

---

**Figure 3-55. Medium stanza example**

[Figure 3-56](#) shows some of the medium limits that correspond to the [Medium] stanza ([Figure 3-55](#)) as they display in the **Search Limits** dialog box.

---



---

**Figure 3-56. Medium limits**

When a medium limit is applied, the system compares the medium code in the first position in the **007 control** field of the MARC record with the medium selected in the **Search Limits** dialog box to find matching records.

### [Type] Stanza

Users can limit searches to the type of item by configuring this stanza. In Voyager, types are a combination of the type of record and the bibliographic level. Any type you want to limit by must be listed in this stanza.

[Figure 3-57](#) shows an example of the [Type] stanza. This stanza is editable and additional type limit codes can be added.



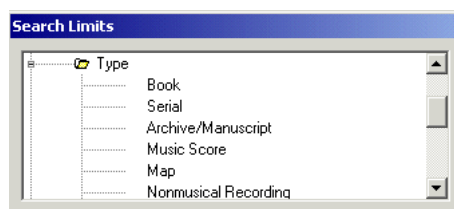
```

[Type]
am=Book
as=Serial
bc=Archive/Manuscript
cm=Music Score
em=Map
fm=Nonmusical Recording
jm=Musical Recording
mm=Computer File/Software
om=Kit
pc=Mixed Material/Collection
pm=Mixed Material
rm=Visual Material

```

**Figure 3-57. Type stanza example**

[Figure 3-58](#) shows some type limits that correspond to the [Type] stanza ([Figure 3-57](#)) as they display in the **Search Limits** dialog box.



**Figure 3-58. Type limits**

When a type limit is applied, the system creates a 2-letter code using the type of record code in the **Leader control** field (position 06) and bibliographic level code in the **Leader control** field (position 07) of the MARC record. This code is then compared to the type selected in the **Search Limits** dialog box to find matching records.

### [Place] Stanza

Users can limit searches to items published in a particular place by configuring this stanza. Any place you want to limit by must be listed in this stanza.

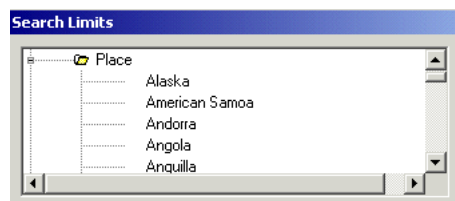
[Figure 3-59](#) shows an example of part of the [Place] stanza. This stanza is editable and additional places can be added.

```
[Place]
aku=Alaska
as=American Samoa
an=Andorra
ao=Angola
am=Anguilla
ay=Antarctica
aq=Antigua and Barbuda
ag=Argentina
azu=Arizona
aru=Arkansas
ai=Armenia (Republic)
air=Armenian S.S.R.
aw=Aruba
at=Australia
au=Austria
aj=Azerbaijan
air=Azerbaijan S.S.R.
bf=Bahamas
ba=Bahrain
bg=Bangladesh
bb=Barbados
bw=Belarus
be=Belgium
bh=Belize
dm=Benin
```

---

**Figure 3-59. Place stanza example**

[Figure 3-60](#) shows some of the place limits that correspond to the [Place] stanza ([Figure 3-59](#)) as they display in the **Search Limits** dialog box.



---

**Figure 3-60. Place limits**

When a place limit is applied, the system compares the place code in the **008 control** field (positions 15-17) of the MARC record to the place selected in the **Search Limits** dialog box to find matching records.

### [Status] Stanza

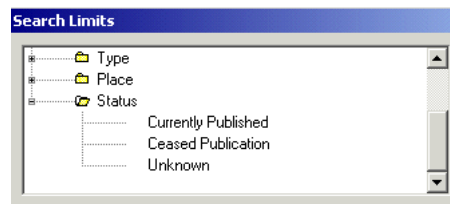
Users can limit searches of serial records by the publication status by configuring this stanza. Any status you want to limit by must be listed in this stanza.

[Figure 3-61](#) shows the [Status] stanza. This stanza is editable and additional status limit types may be added.

```
[Status]
c=Currently Published
d=Ceased Publication
u=Unknown
```

**Figure 3-61. Status stanza example**

[Figure 3-62](#) shows the status limits that correspond to the [Status] stanza ([Figure 3-61](#)) as they display in the **Search Limits** dialog box.



**Figure 3-62. Status limits**

When a status limit is applied, the system compares the status code in the **008 control** field (position 06) of the MARC record with the status selected in the **Search Limits** dialog box to find matching records.

## Limiting a Search

The procedure for setting search limits is shown in [Procedure 3-9, Setting Search Limits](#).

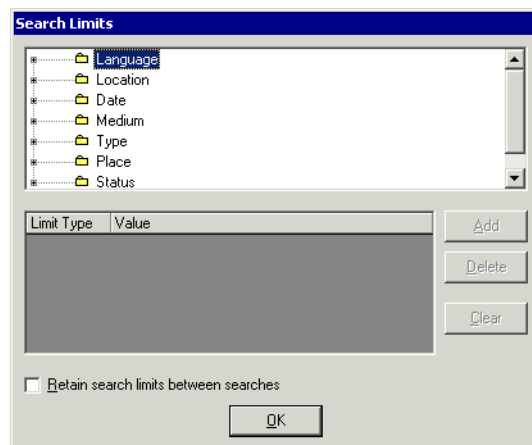


### Procedure 3-9. Setting Search Limits

Use the following to set search limits.

1. Click the **Limit** button to limit your search.

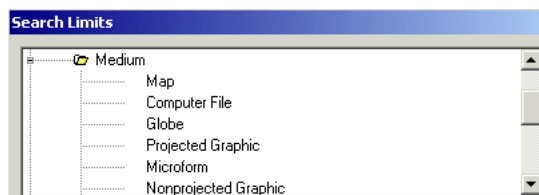
Result: The **Search Limits** dialog box opens (see [Figure 3-63](#)).



**Figure 3-63. Search Limits dialog box**

2. Click the plus sign ( + ) for the limit type you want to select.

Result: This expands the list and displays the list of limit type values (see [Figure 3-64](#)).



**Figure 3-64. Expanded list of limits**

3. Select any values from the list you want to use as limits for your search. [Figure 3-65](#) shows the Medium limit of Computer File selected.

**NOTE:**

The **Add** button is not active until a specific limit is selected.

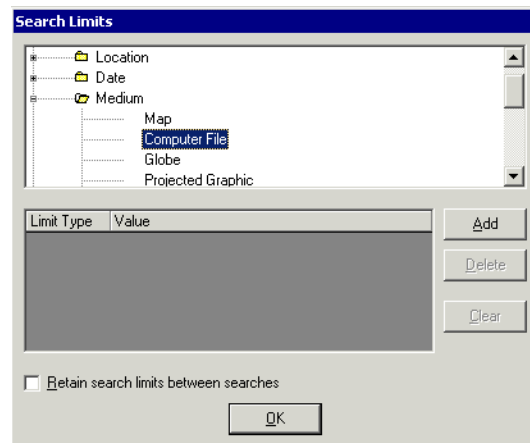


Figure 3-65. Computer File selected as search limit

4. Click the **Add** button (or double-click the value) to add the limit to the list.

Result: The limit type value you selected displays in the **Limit Type** and **Value** columns (see [Figure 3-66](#)).

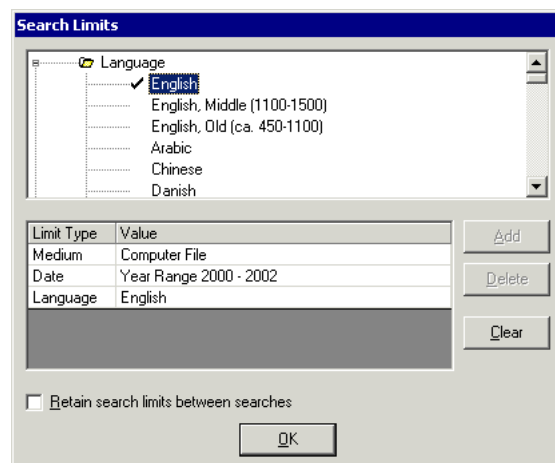


Figure 3-66. Selected search limits listed in the bottom portion of the dialog box

**OPTIONAL:**

5. Click the **Retain search limits between searches** check box.

**OPTIONAL:**

6. *To edit the limits you have chosen, select a limit type value from the **Value** column and click the **Delete** button to remove the value from the limits to be applied or click the **Clear** button to remove all limit type values from the **Value** column.*
7. Click **OK** to accept the limiting criteria and return to the **Search** dialog box.

Result: The search limits are set.

---

## **MFHD-Bibliographic Combined Keyword Search (optional feature)**

---

The MFHD-Bibliographic Combined Keyword Search provides the ability to combine holdings and bibliographic search criteria into one keyword search. This function is available through Voyager client and OPAC search facilities. (The focus of this user's guide description is about the Voyager client capabilities.)

**NOTE:**

The MFHD-Bibliographic Combined Keyword Search is an optional feature that requires headings keyword indexes to be built. Contact Ex Libris Customer Support for more information.

In the Voyager client, the combined search may be performed as a command-line Boolean Keyword search or the Builder search function may be used.

Example: The following is an example of a command-line search for “102 Dalmatians” or “African Queen” in the motion picture collection where SPAC is the Voyager code for the indexed 901 \$a holdings field and MP is the code representing the motion picture collection stored in the 901 \$a . See [Figure 3-67](#) and [Figure 3-68](#).

**Search**

Keyword   Index Selection   Builder   History

☒ Boolean   ( not using relevance )  
☐ Free Text   ( using relevance )  
☐ Holdings Boolean   ( not using relevance )

Search for:  
SPAC MP and ("African Queen" or "102 dalmatians")

Default Tab

Do Search   Cancel   Clear   Limit...   Remote...   Google

**Figure 3-67. MFHD-Bibliographic Combined Keyword Search - command line example**

**Titles Index**

Font: Arial Unicode MS   Sort By:

Full Title	Author	Dates
102 Dalmatians [videorecording] / Walt Disney Pictures presents an Edwards, Feldman production.		2001
African Queen [videorecording] / Horizon Pictures.		1984

OK   Cancel   Search   Select All   Clear All

2 Records Found   Search: Command=SPAC MP and ("African Queen" or "102 dalmatians")

**Figure 3-68. Results of MFHD-Bibliographic Combined Keyword Search**

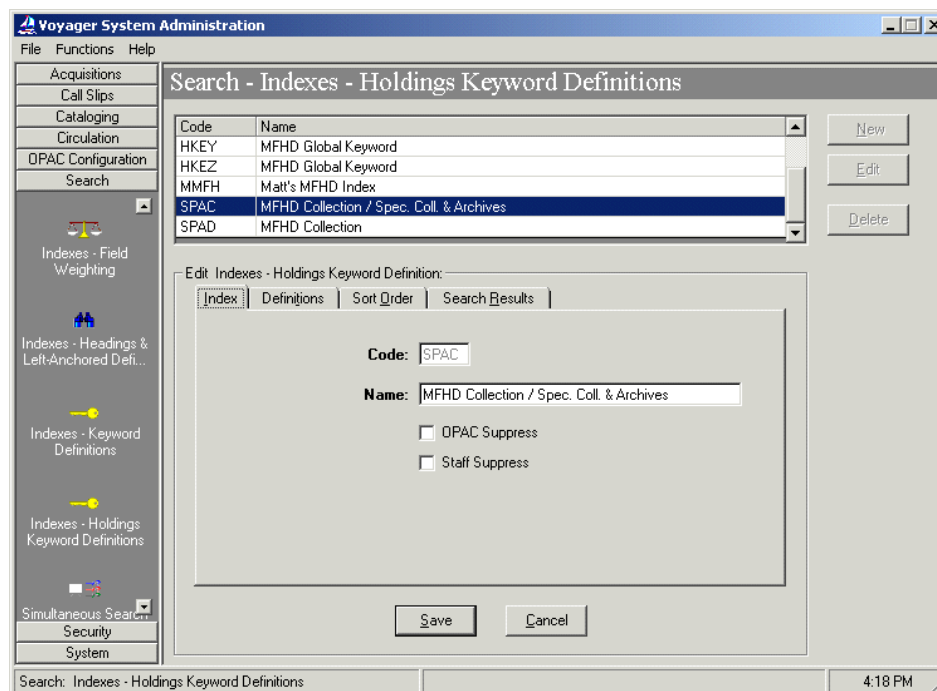
**NOTE:**

The 901 ʒa is used for local cataloging conventions and examples of MFHD-Bibliographic Combined Keyword Search vary from institution to institution based on what is indexed.

**Setup**

Voyager provides the SPAC holdings keyword definition in Voyager System Administration for use with the MFHD-Bibliographic Combined Keyword Search. See [Figure 3-69](#). The SPAC definition may be edited and/or additional definitions may be created depending on what you have indexed in your database.

Follow the normal procedures for defining holdings keyword definitions. See the *Voyager System Administration User's Guide* for more information.



**Figure 3-69. SPAC holdings keyword definition**

The SPAC code may be used in a command-line search to identify the index to be searched. See [Figure 3-67](#).



## Search Options

---

The MFHD-Bibliographic Combined Keyword Search incorporates the following functional search options/characteristics.

- Boolean operators to include parentheses for grouping and quotes for phrases
- And, or, or not boolean logic may be used to separate each index and term/phrase combination in a command line search as in [Figure 3-67](#)

**NOTE:**

Free-text search syntax of the plus sign and asterisk is not available for command-line boolean searches.

- Search limits
- Remote searching via a Voyager-to-Voyager connection is available

**NOTE:**

The MFHD-Bibliographic Combined Keyword Search feature must be installed on each remote Voyager server and the search codes (such as SPAC) must be compatible for remote Voyager searching to work.

## Search Results Display

---

The MFHD-Bibliographic Combined Keyword Search incorporates the following search results display characteristics.

- Search results sets display the associated bibliographic record for the MFHD-bibliographic combined search
- Search results set limit continues to be 10,000
- Search results are de-duplicated by bibliographic ID
- Search results display in the Titles Index format
- Search results columns displayed are determined by the first index in the search when multiple indexes are combined in a search per pre-existing functionality

## User Considerations

---

In utilizing the MFHD-Bibliographic Combined Keyword Search function, be aware of the following considerations.

- MFHD keyword indexes are not available to the Z39.50 server. As a result, there is no way to incorporate a Z39.50 search into a combined MFHD-bibliographic search.
- Holdings-only search criteria (without the combined bibliographic criteria) generate bibliographic results sets. See [Search Results Display](#) on [page 3-73](#) for more information. Use the optional Holdings Boolean Keyword search function to generate holdings results sets.

## **Searching in Circulation Examples**

---

This section discusses and provides examples of searching in the Circulation module.

In the Circulation module, users access the **Search** dialog box by selecting the **ellipsis** button from the **Item Barcode** or **Barcode** field when searching in the **Charge**, **Discharge**, **Reserve List Search**, and **Item Record** workspaces.

After conducting a search, the item automatically populates the **Item Barcode/Barcode** field and the Circulation activity occurs. For example, the item is charged or discharged.

Additionally, users access the **Search** dialog box when adding an item to an open reserve list by selecting **Add by Headings/Keyword** from **Items** on the **Reserve** menu. After this search is conducted, the item is added to the list.

## **Keyword Searching in the Circulation Module**

---

<b>If the Keyword search is</b>	<b>Then the results display in... and the activity is...</b>
Boolean	The <b>Titles Index</b> dialog box displays. Clicking the <b>OK</b> button populates the <b>Item Barcode</b> or <b>Barcode</b> field and automatically either charges, discharges, opens the item record, creates a secondary search for a reserve list containing that item, or adds the item to the reserve list depending on the workspace in Circulation from which the search was conducted. See the <a href="#">Boolean search</a> example on <a href="#">page 3-75</a> .
Free text	The <b>Titles Index</b> dialog box displays with relevance bars. Clicking the <b>OK</b> button populates the <b>Item Barcode</b> or <b>Barcode</b> field and automatically either charges, discharges, opens the item record, creates a secondary search for a reserve list containing that item, or adds the item to the

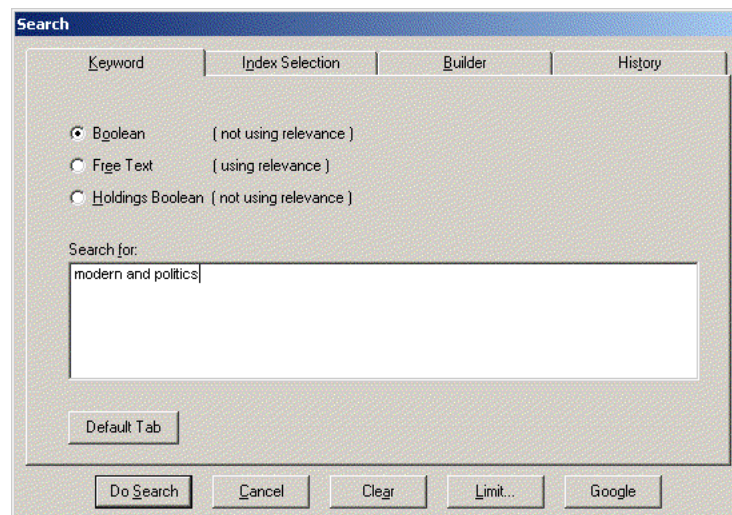
reserve list depending on the workspace in Circulation from which the search was conducted. See the [Free Text search](#) example on page [3-76](#).

Holdings  
Boolean

The **Holdings Index** dialog box displays. Clicking the **OK** button populates the **Item Barcode** or **Barcode** field and automatically either charges, discharges, opens the item record, creates a secondary search for a reserve list containing that item, or adds the item to the reserve list depending on the workspace in Circulation from which the search was conducted. See the [Holdings Boolean search](#) example on page [3-78](#).

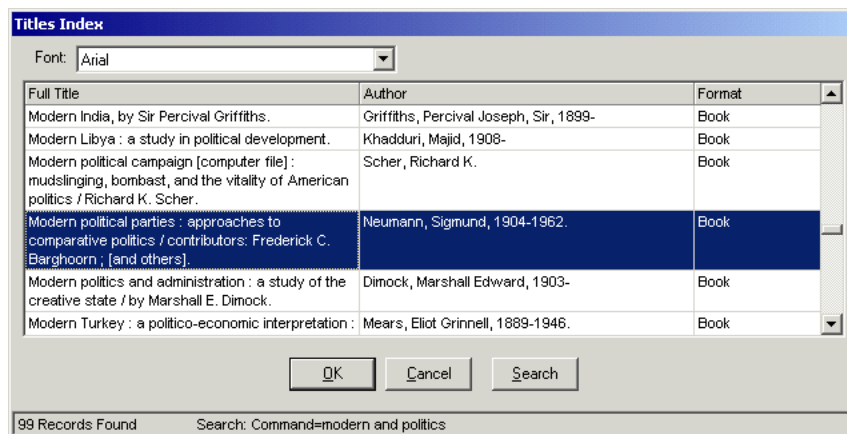
Example: Boolean search

Conduct a Boolean search to charge an item containing the words **modern** and **politics** ([Figure 3-70](#)).



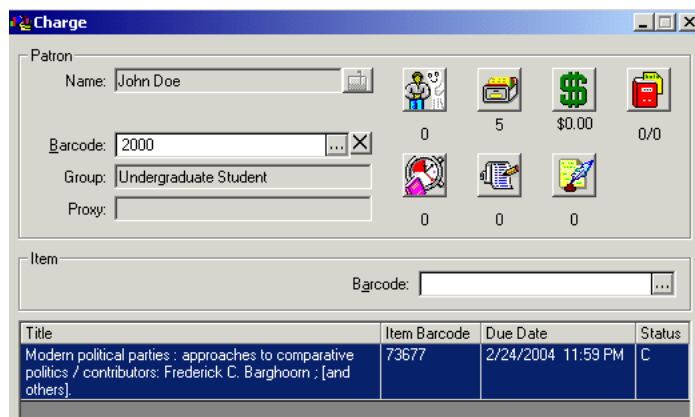
**Figure 3-70. Boolean search for an item**

After the search is conducted, a **Titles Index** dialog box lists the results ([Figure 3-71](#)).



**Figure 3-71. Titles Index dialog box listing the results of the Boolean search**

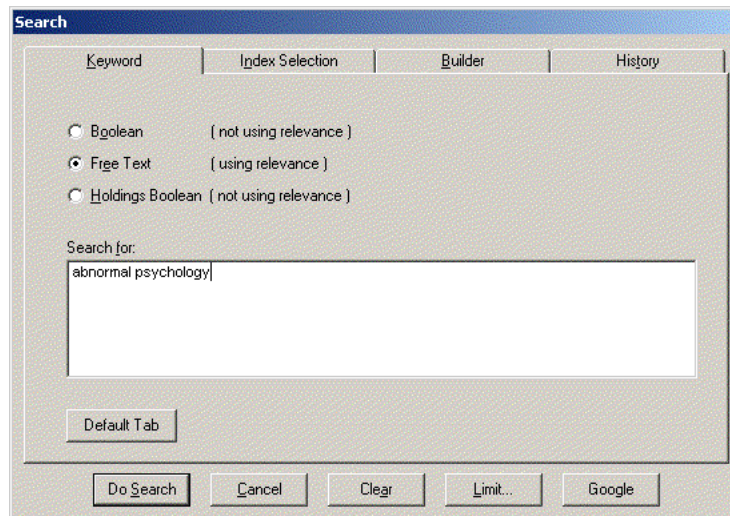
After a title is selected and the user clicks **OK**, the title populates the **Barcode** field and is immediately charged to the patron ([Figure 3-72](#)).



**Figure 3-72. Selected item is charged**

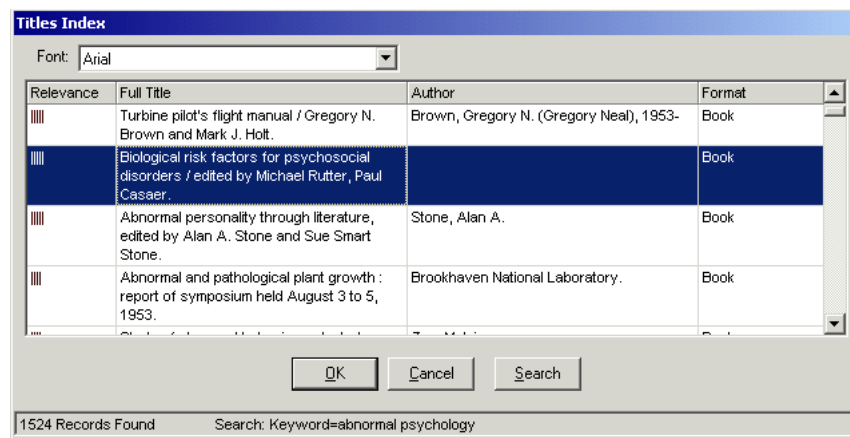
Example: Free Text search

Conduct a Free text search to find a reserve list relating to **abnormal psychology** ([Figure 3-73](#)).



**Figure 3-73. Free-text search for a reserve list**

After the search is conducted, a **Titles Index** dialog box lists the results ([Figure 3-74](#)).



**Figure 3-74. Titles Index dialog box listing the results of the Free Text search**

After a title is selected and the user clicks **OK**, the secondary search occurs for a reserve list containing the selected item. If a list is found, it displays ([Figure 3-75](#)).

The screenshot shows a window titled "Reserve" with a "Reserve List Header" section. It contains fields for "List Name" (Psychology 201), "Effective" dates (1/1/2004 to 6/1/2004), "Location" (Circulation Desk), "Item Type" (Book), "Item Count" (3), and "E-item Count" (0). Below this is a table with two tabs: "Items" and "E-Items". The "Items" tab is active, showing a table with columns: Title, Author, Barcode, Call Number, Location, and Item Type. Two items are listed.

Title	Author	Barcode	Call Number	Location	Item Type
Abnormal personality through literature, edited by Alan A. Stone and Sue Smart Stone.	Stone, Alan A.	88513	PN6071.M4 S76 1966	Main	Book
Biological risk factors for psychosocial disorders / edited by Michael Rutter, Paul Casaer.		21290	RC455.4.R56 B56 1991	Main	Book

**Figure 3-75. Reserve list found after conducting a Free Text search**

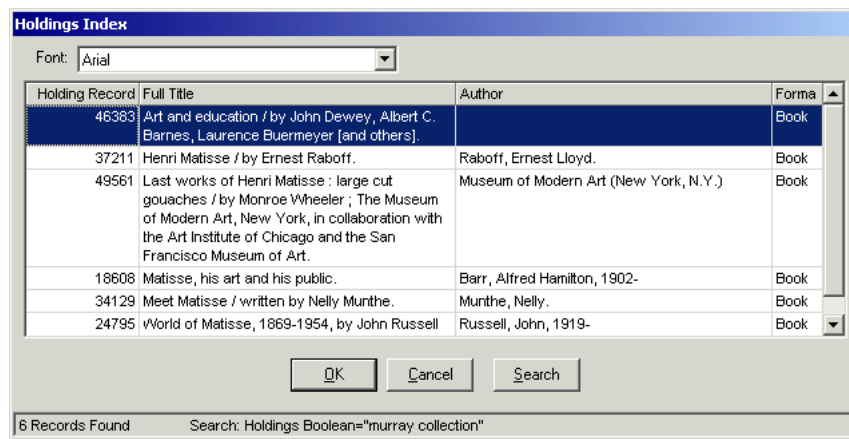
Example: Holdings Boolean search

Conduct a Holdings Boolean search to find an item belonging to the **Murray collection** ([Figure 3-76](#)). In this case, holdings records contain an additional tag with collection information.

The screenshot shows a "Search" dialog box with four tabs: "Keyword", "Index Selection", "Builder", and "History". The "Index Selection" tab is active. It contains three radio buttons: "Boolean (not using relevance)", "Free Text (using relevance)", and "Holdings Boolean (not using relevance)". The "Holdings Boolean" option is selected. Below the radio buttons is a text box labeled "Search for:" containing the text "murray collection". At the bottom are buttons for "Default Tab", "Do Search", "Cancel", "Clear", "Limit...", and "Google".

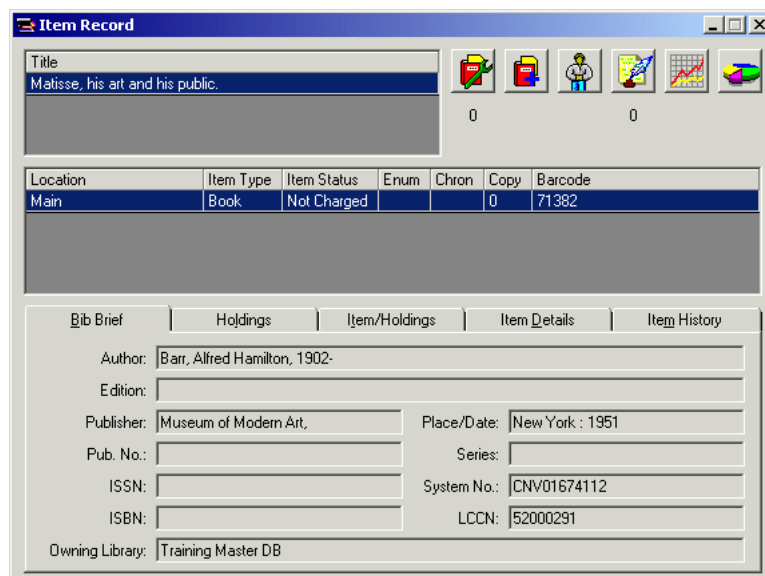
**Figure 3-76. Holdings Boolean search for items belonging to the Murray collection**

After the search is conducted, a **Holdings Index** dialog box lists the results ([Figure 3-77](#)).



**Figure 3-77. Holdings Index listing the results of the Holdings Boolean search**

After a holdings record is selected and the user clicks **OK**, the item record linked to that holdings record displays ([Figure 3-78](#)).



**Figure 3-78. Selected holdings record item record displays**

**NOTE:**

If more than one item record is linked to the selected holdings record, the user needs to choose the wanted item record.

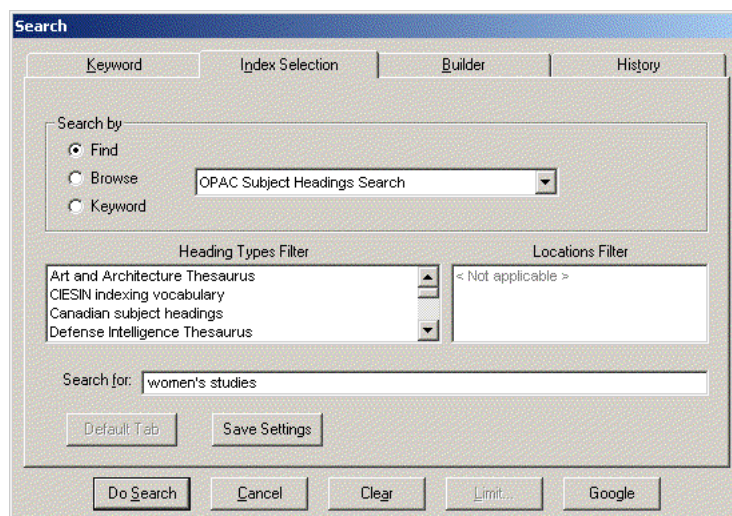
**Index Selection Searching in the Circulation Module**

<b>If the Index Selection search is</b>	<b>Then the results display in... and the activity is...</b>
Headings	The <b>Headings List</b> dialog box displays. Clicking the <b>OK</b> button opens the <b>Titles Index</b> dialog box. Selecting a title then populates the <b>Item Barcode</b> or <b>Barcode</b> field and automatically either charges, discharges, opens the item record, creates a secondary search for a reserve list containing that item, or adds the item to the reserve list depending on the workspace in Circulation from which the search was conducted. See the <a href="#">Headings search</a> example on page <a href="#">3-80</a> .
Left-Anchored	The <b>Titles Index</b> dialog box displays. Selecting a title and clicking the <b>OK</b> button populates the <b>Item Barcode</b> or <b>Barcode</b> field and automatically either charges, discharges, opens the item record, creates a secondary search for a reserve list containing that item, or adds the item to the reserve list depending on the workspace in Circulation from which the search was conducted. See the <a href="#">Left-Anchored search</a> example on page <a href="#">3-82</a> .

**Example: Headings search**

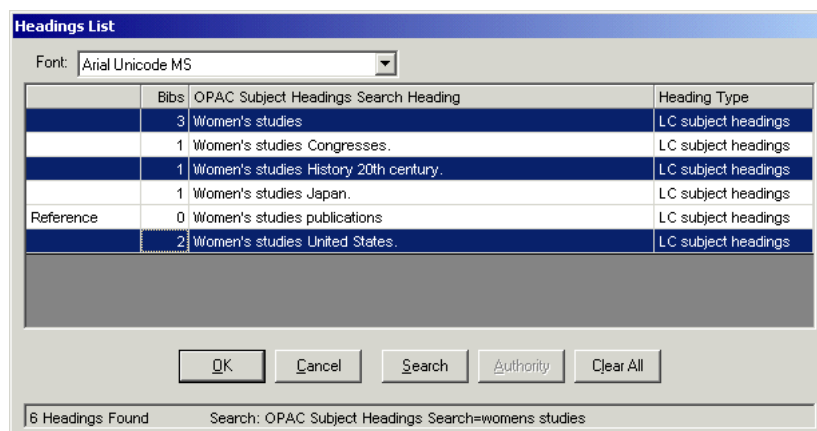
Conduct a headings search to add items to a reserve list for a Women's Study course ([Figure 3-79](#)).





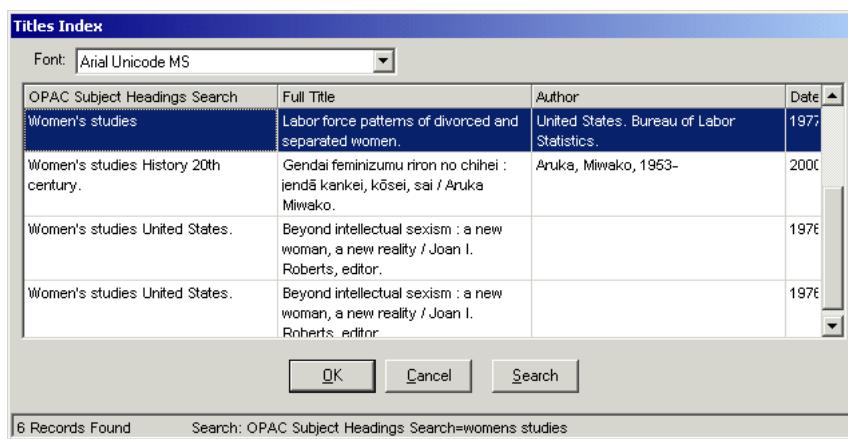
**Figure 3-79. Headings search**

After the search is conducted, a **Headings List** dialog box lists the results ([Figure 3-80](#)).



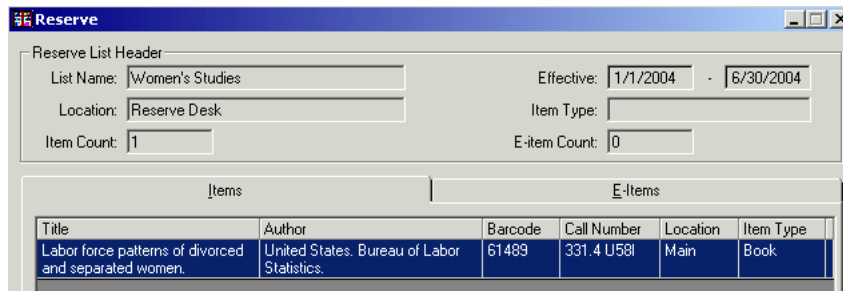
**Figure 3-80. Headings List dialog box listing the results of the search**

After headings are selected and the user clicks **OK**, the **Titles Index** dialog box lists the records associated with the selected headings ([Figure 3-81](#)).



**Figure 3-81. Titles Index dialog box listing the results of the Free Text search**

After a title is selected and the user clicks **OK**, the item is added to the reserve list ([Figure 3-82](#)).



**Figure 3-82. Reserve list with newly-added item**

Example: Left-Anchored search

Conduct a Title left-anchored search to discharge an item ([Figure 3-83](#)).

Search

Keyword Index Selection Builder History

Search by

☒ Find

☐ Browse

☐ Keyword

Title <

Heading Types Filter

< Not applicable >

Locations Filter

< Not applicable >

Search for: photography a facet?

Default Tab Save Settings

Do Search Cancel Clear Limit... Google

**Figure 3-83. Left Anchored Title search**

After the search is conducted, a **Titles Index** dialog box lists the results ([Figure 3-84](#)).

Titles Index

Font: Arial Unicode MS

Title <	Author	Date	Title Brief
Photography, a facet of modernism : photographs from the San Francisco Museum of Modern Art /	San Francisco Museum of Modern Art.	1986	Photography, a facet of modernism : photographs from the San Francisco Museum of Modern Art /

**Figure 3-84. Titles Index dialog box listing the results of the Boolean search**

After a title is selected and the user clicks **OK**, the item populates the **Item Barcode** field of the **Discharge** workspace and is immediately discharged ([Figure 3-85](#)).

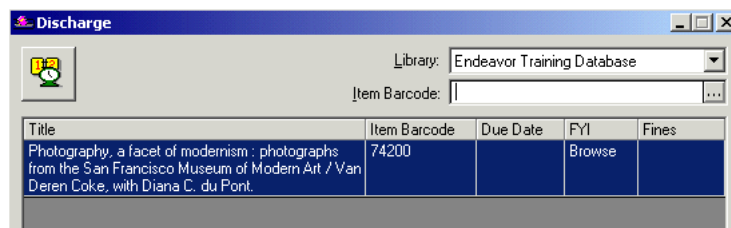


Figure 3-85. Selected item is discharged

### Builder Searching in the Circulation Module

---

All **Builder** tab searches are keyword searches. Therefore, the results are displayed in the **Titles Index** dialog box. Additionally, limits can be applied. See [Search Limits](#) on [page 3-56](#). See the [Builder search](#) example on [page 3-84](#).

Example: Builder search

Conduct a Builder search for items related to activism and the United States ([Figure 3-86](#)).

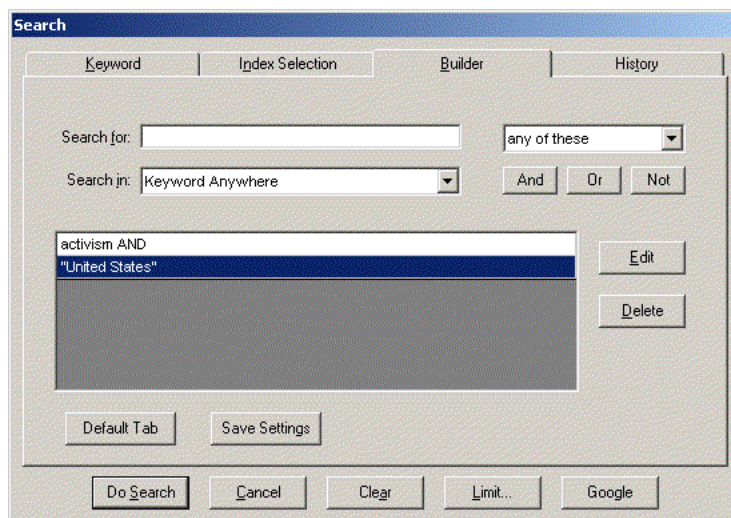
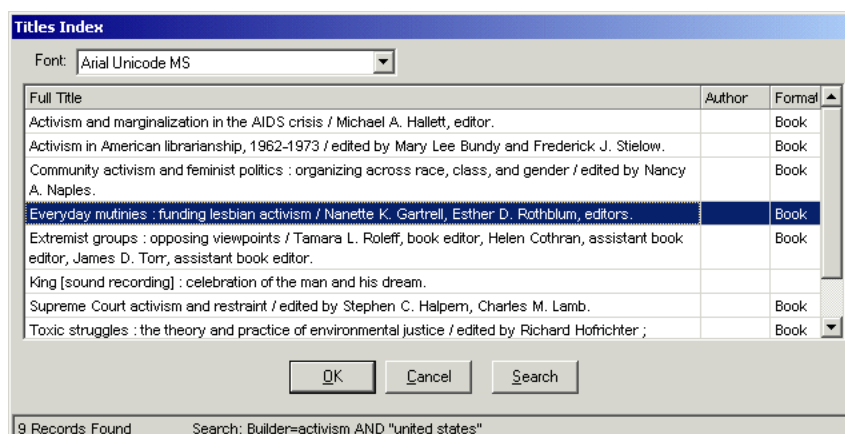


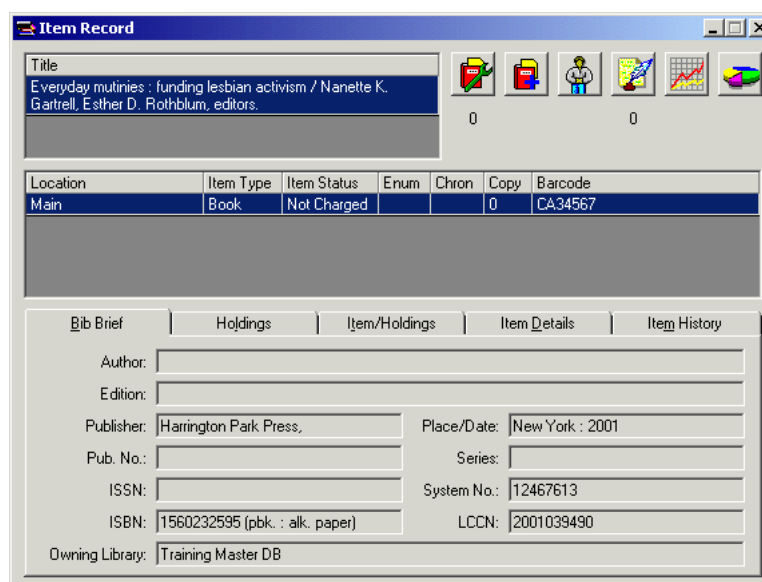
Figure 3-86. Builder search for items

After the search is conducted, a **Titles Index** dialog box lists the results ([Figure 3-87](#)).



**Figure 3-87.** Titles Index dialog box listing the results of the Builder search

After a title is selected and the user clicks **OK**, the item record associated with this title displays ([Figure 3-88](#)).



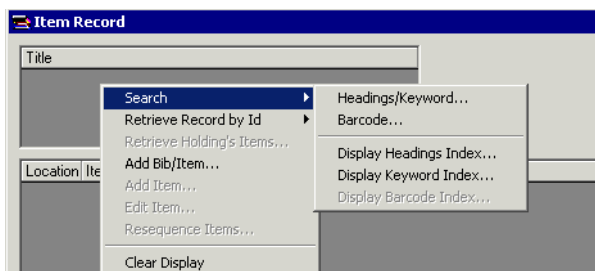
**Figure 3-88.** Selected item displays

## Searches Available from the Item Menu

---

When the Item Record displays, the **Item** menu on the **Circulation** menu bar becomes active providing other means of accessing ways to search for an item record. These same options are available with a right-click when an item record displays (see [Figure 3-89](#)).

---



---

**Figure 3-89. Searches Available on the Item Menu**

The following options are found on the Item menu

- **Item> Search> Headings/Keyword** (Ctrl + F1) opens the **Search** dialog box
- **Item> Search> Barcode** (Ctrl + F2) opens the **Search for Item Barcode** dialog box
- **Item> Search> Display Headings Index** (Shift + F6) opens the last **Headings Index** resulting from a headings search
- **Item> Search> Display Keyword Index** (Ctrl + F7) opens the last **Keyword Index** resulting from keyword search
- **Item> Search> Display Barcode Index** (Shift + F8) opens the last **Barcode Index** resulting from a barcode search
- **Item> Retrieve Record by ID> Bib or Item** opens the **Retrieve Record by Id** dialog box. Users can access item records by using either their system generated Bibliographic record ID, or their system generated Item record ID.



### Procedure 3-10. Retrieving an Item by Record ID

---

Use the following to retrieve an item by either the Bibliographic or item record ID.

1. From the Circulation toolbar click the **Item** button (or select Item from the Functions menu).

Result: The **Search by item barcode** dialog box opens.

2. Click the **Cancel** button.
3. From the **Item** menu select **Retrieve record by ID** (or right-click and select it from the menu that displays).
4. Select either the **Bib ID** or **Item ID** radio button.

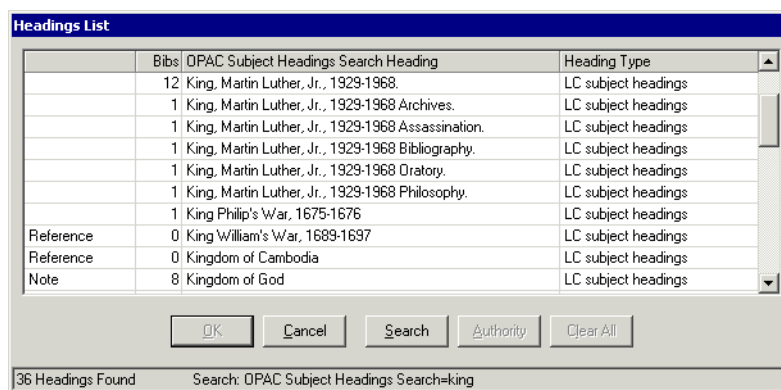
Result: The **Retrieve record by ID** dialog box opens.

5. Click the **Bib** radio button if you want to search using a bibliographic record ID or the **Item** radio button if you want to search using the item record ID.
6. Enter the record id in the **Record Id** field and click **OK**.

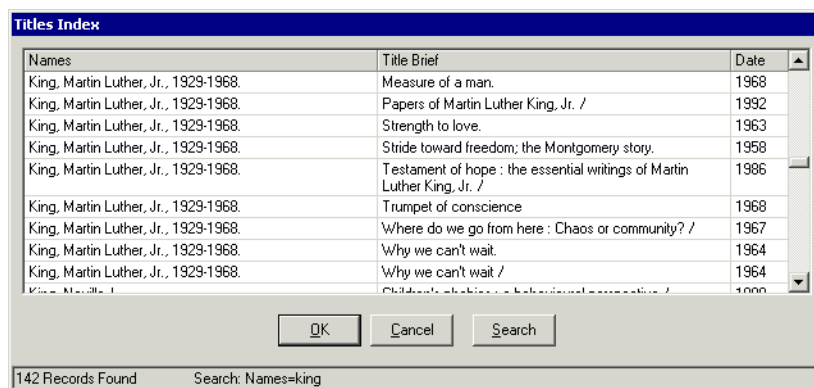
Result: The item record displays.

### Multiple Items Match the Search Criteria

If you search for an item and more than one item matches your search criteria, either a **Headings List** ([Figure 3-90](#)) or a **Titles Index** ([Figure 3-91](#)) opens depending on the search executed.



**Figure 3-90. Headings Index after multiple items match search criteria**



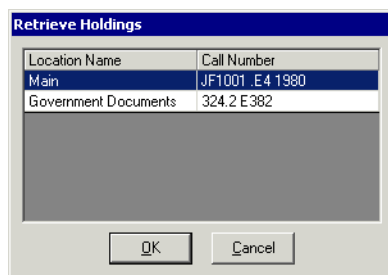
**Figure 3-91. Titles Index after Multiple Items Match Search Criteria**

The operator selects the heading wanted from the **Headings List**, then selects the title from the **Titles Index**. Or from the **Titles Index** the operator selects the title wanted. Then the correct Item Record displays.

---

### Multiple Holdings Display

If you search your library's catalog for an title and more than one holdings record exists for that title, the **Retrieve Holdings** dialog box opens (see [Figure 3-92](#)).



**Figure 3-92. Retrieve Holdings Dialog Box**

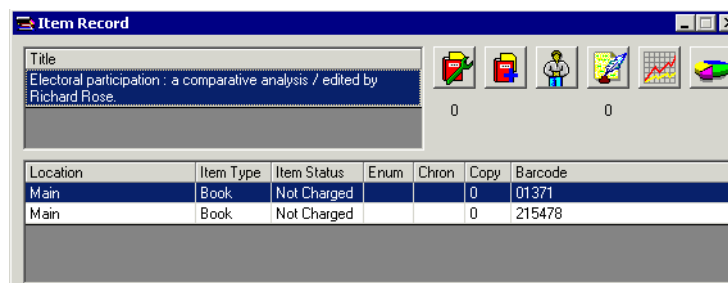


The **Retrieve Holdings** dialog box opens displaying the locations and call numbers of the holdings records matching your search criteria. Select a holdings record by selecting the location name and clicking **OK** (or double-click the location name).

## Multiple Items Display

A holdings record can have more than one item record attached to it. After searching for and displaying the item record, you can determine whether or not additional item records exist and are attached to the same holdings record by using the **Retrieve Holding's Items** command from the **Item** menu (or right-click and select the same command from the submenu).

If more than one item record exists for the holdings record, the item record display changes to include all the item records (see [Figure 3-93](#)).



**Figure 3-93. Multiple Item Records Display**

### NOTE:

If multiple item records display, you are required to specify an item copy.

For example, if you want to edit one of the item records, you must select the particular item copy first, then choose **Edit Item** from the **Item** menu and proceed with the edits.



---

### Introduction

This chapter contains information about the patron record. Patron records contain information about a patron, such as name, address, and phone number. They also contain a record of current circulation activity, such as fines/fees, items charged and requested. Other historical information is contained in the patron record, such as past fine/fee information and various patron counters.

---

### Purpose of This Chapter

From an open patron record, you can add, edit, and view patron information. You can also check a patron's pending and available requests, fines and fees, and charged items.

This chapter discusses the following:

- Contents of the patron record
- Creating, editing, deleting, and duplicating a patron record
- Adding multiple barcodes, addresses, and phone numbers to the patron record
- Adding and editing PINs
- The **Charged Items Index**
- The **Patron Fines/Fees** dialog box

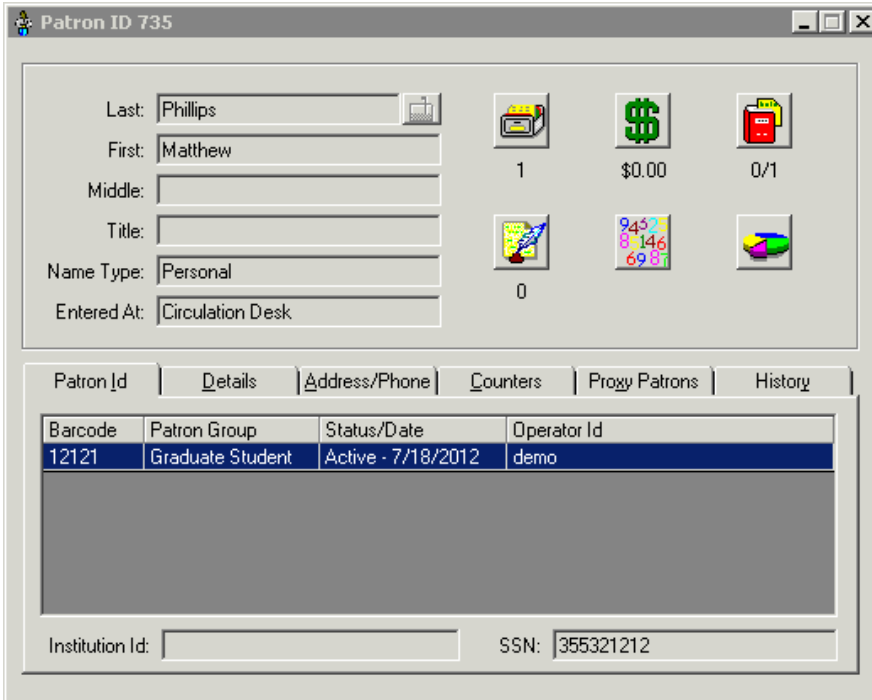
- The **Patron Request Information** dialog box
- The **Patron Notes** dialog box
- Setting Patron Counters
- Patron Statistical Information
- Creating Proxy Patrons
- E-mailing from the Circulation module

## The Patron Record

---

A Patron Record ([Figure 4-1](#)) contains a variety of information about the patron and their circulation activity. There are three sections in a patron record.

- Name information section
- Buttons to access additional patron information
- Tabs to access additional patron information



Patron ID 735

Last: Phillips  
First: Matthew  
Middle:   
Title:   
Name Type: Personal  
Entered At: Circulation Desk

1 \$0.00 0/1  
0 94523 8146 6987

Patron Id Details Address/Phone Counters Proxy Patrons History







Barcode	Patron Group	Status/Date	Operator Id
12121	Graduate Student	Active - 7/18/2012	demo

Institution Id:   
SSN: 355321212


**Figure 4-1. Patron Record dialog box**

[Table 4-1](#) describes the **Patron** record dialog box.

**Table 4-1. Patron Record**

Field Name	Description
Last	Patron's last name.
E-mail control button 	Opens up a new e-mail message to send to the patron. See <a href="#">E-mail Control Button</a> on <a href="#">page 4-4</a> .
First	Patron's first name.
Middle	Patron's middle name.
Title	Patron's title.
Name Type	Personal name or Institution name.
Entered At	Location at which the patron record was created.
Charged Items button 	Opens the <b>Charged Items Index</b> dialog box (see <a href="#">Figure 4-3</a> ), which includes the items that the patron has currently charged.  The number under the button indicates the number of items that the patron has charged.
Fines/Fees button 	Opens the <b>Patron Fines/Fees</b> dialog box (see <a href="#">Figure 4-4</a> ).  Includes information on the patron's current fines/fees or fines/demerits.  The numbers beneath the button indicate the total amount of fines/fees currently assessed to the patron.
Request Information button 	Opens the <b>Patron Request Information</b> dialog box (see <a href="#">Figure 4-5</a> ).  Provides information on the patron's holds, recalls, callslips, and short loans.  The first number beneath the button indicate the number of available hold or recall requests, and the second number indicates the number of pending hold or recall requests.
Notes button 	Opens the <b>Notes</b> dialog box (see <a href="#">Figure 4-6</a> ).  Operators can add a note to this patron's record if wanted.  The number beneath the button indicates the number of notes associated with this patron's record.
Counters button 	Opens the <b>Set Patron Counters</b> dialog box (see <a href="#">Figure 4-6</a> ).  Operators can edit the patron counters associated with this patron's record.

**Table 4-1. Patron Record**

Field Name	Description
Statistics button 	Opens the <b>Patron Statistical Categories</b> dialog box (see <a href="#">Figure 4-6</a> ).  Operators can add or remove patron statistical categories associated with this patron's record.
Patron ID tab	Contains barcode, the patron groups with which this patron is associated, and status information.
Details tab	Contains SMS number, expiration information, department, major, and birth date.
Address/Phone tab	Contains all addresses/phone numbers associated with this patron.
Counters tab	Contains all the transaction counters and their totals for the patron record.
Proxy Patrons tab	Lists any sponsor patrons for whom this patron is considered a proxy.
History tab	Keeps a record of the dates on which the patron record was created or updated.
Institution ID	Patron's institution ID.
SSN	Patron's social security number.  <b>NOTE:</b> This will appear as xxx-xx-xxxx if the <b>Mask Patron Social Security Number</b> check box is selected in the operator's circulation security profile.

---

### Patron Record Buttons

There are several buttons on the patron record. When clicked, they open various forms providing the operator with additional information or the ability to accomplish a task.

#### E-mail Control Button

If a patron has an active e-mail address in their patron record, the **E-mail control** button is activated. If there is no active e-mail address, the button is inactive. When clicked, it opens an e-mail message screen. This allows the operator to send an e-mail message to the patron (see [Figure 4-2](#)).

**NOTE:**

The e-mail program on the computer does not have to be open in order for e-mails to be sent.

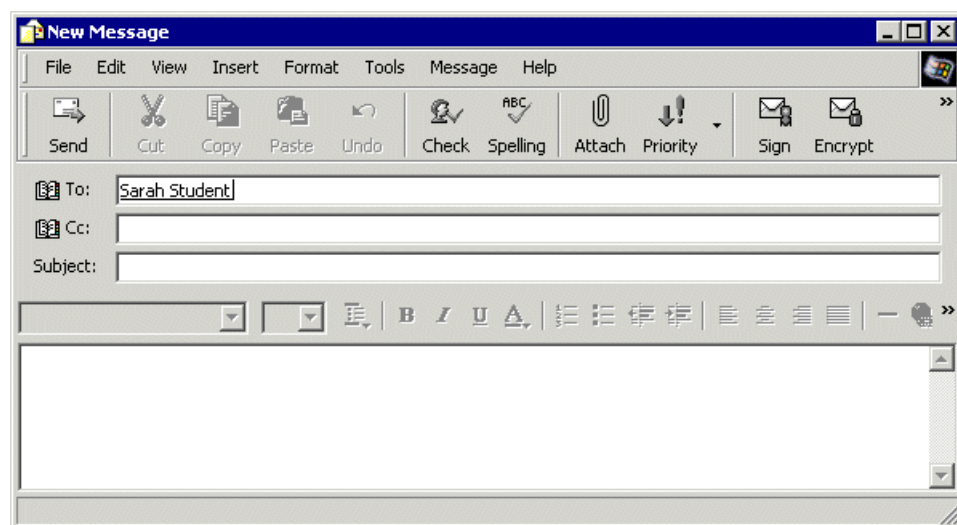


Figure 4-2. E-mail Message Available

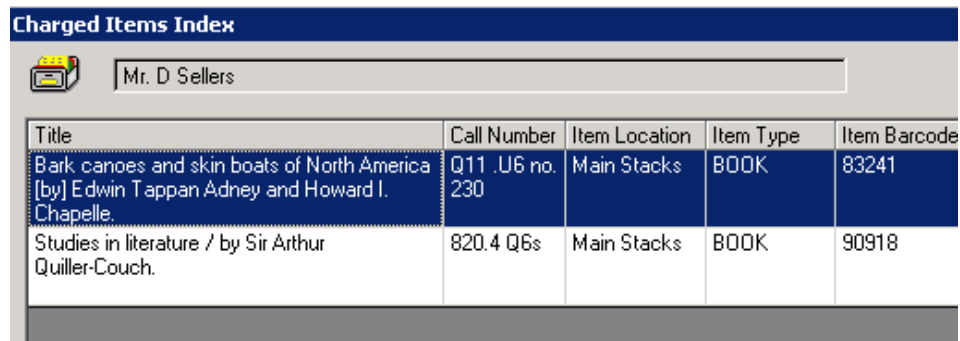
**NOTE:**

There are four places within the Circulation module from which operators are able to e-mail patrons: the **Patron Record** dialog box, **Charge** dialog box, **Charged to** dialog box accessed from the **Item** dialog box, and the **Charged to** dialog box accessed from the **Course Reserve** dialog box.

See [E-mailing from the Circulation Module](#) on [page 4-154](#) for more information and [E-mailing Patrons from the Circulation module](#) on [page 1-8](#) for information on configuring your computer.

### Charged Items Index

The **Charged Items** button opens the **Charged Items Index** which provides information on the patron's current charges (see [Figure 4-3](#)).



Title	Call Number	Item Location	Item Type	Item Barcode
Bark canoes and skin boats of North America [by] Edwin Tappan Adney and Howard I. Chapelle.	Q11 .U6 no. 230	Main Stacks	BOOK	83241
Studies in literature / by Sir Arthur Quiller-Couch.	820.4 Q6s	Main Stacks	BOOK	90918

**Figure 4-3. Charged Items Index**

See [Charged Items Index](#) on [page 4-74](#) for additional information on the **Charged Items Index**.

### **Patron Fines/Fees**

The **Fines/Fees** button opens the **Patron Fines/Fees** dialog box which provides information on the patron's current fines/fees or fines/demerits (see [Figure 4-4](#)).



**Patron Fines/Fees**

\$\$\$ 0000000000 Jorge Fernandez

Fines, Fees and Demerits for Location: All Locations

Outstanding Fines/Fees				Fines/Fees History			
Date	Title	Barcode	Fee/Posting Type	Fee	Posting	Balance	Location
9/3/2013 05:56 PM	Harry Potter and the prisoner of Azkaban / by J.K. Rowling	6664581682	Overdue	\$7.00		\$7.00	Circulation Desk
4/21/2010 02:36 PM	Martin Luther King, Jr. [videorecording]	20557	Lost Item Replacement	\$100.00		\$100.00	
4/21/2010 02:36 PM	Martin Luther King, Jr. [videorecording]	20557	Overdue	\$10.00		\$10.00	

Description:

**Total Selected:** \$7.00  
**Total fines displayed:** \$117.00  
**Total Due:** \$117.00

Charge Date:   
 Due Date:   
 Discharge Date:   
 Notice Sent:

Create  
 Operator: demo  
 Location: Circulation Desk

Modify  
 Date:   
 Operator:   
 Location:

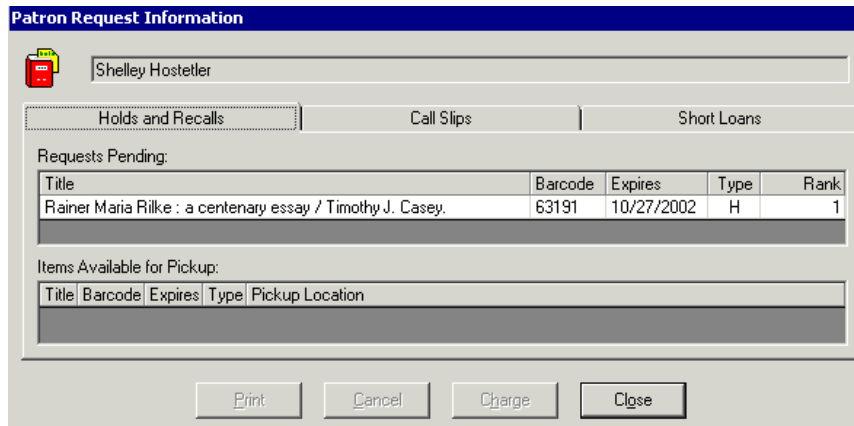
Item Info... Print Add... Modify... Post... Close

**Figure 4-4.** Patron Fines/Fees Dialog Box

See [Patron Fines/Fees](#) on [page 4-86](#) for additional information on patron fines/fees.

### Patron Request Information

The **Patron Request Information** button opens the **Patron Request Information** dialog box which provides information on the patron's holds, recalls, callslips, and short loans (see [Figure 4-5](#)).



The dialog box is titled "Patron Request Information" and features a blue header bar. Below the header, there is a text field containing the name "Shelley Hostetter". To the left of this field is a small icon of a book with a red bookmark. Below the name field are three tabs: "Holds and Recalls", "Call Slips", and "Short Loans". The "Holds and Recalls" tab is currently selected. Under this tab, there is a section labeled "Requests Pending:" followed by a table. The table has five columns: "Title", "Barcode", "Expires", "Type", and "Rank". One row of data is visible: "Rainer Maria Rilke : a centenary essay / Timothy J. Casey.", "63191", "10/27/2002", "H", and "1". Below the "Requests Pending" section is another section labeled "Items Available for Pickup:" followed by a table with five columns: "Title", "Barcode", "Expires", "Type", and "Pickup Location". This table is currently empty. At the bottom of the dialog box are four buttons: "Print", "Cancel", "Charge", and "Close".

Title	Barcode	Expires	Type	Rank
Rainer Maria Rilke : a centenary essay / Timothy J. Casey.	63191	10/27/2002	H	1

Title	Barcode	Expires	Type	Pickup Location
-------	---------	---------	------	-----------------

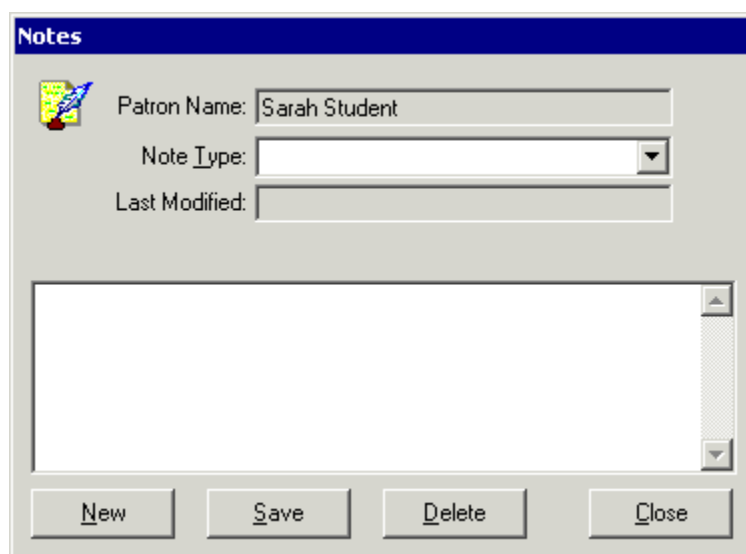
---

**Figure 4-5. Patron Request Information Dialog Box**

[Patron Fines/Fees](#) on [page 4-86](#) for additional information on the patron fines/fees.

## Notes

The **Notes** button opens the **Notes** dialog box where operators may add, edit, or delete notes (see [Figure 4-6](#)).



The image shows a 'Notes' dialog box with a blue title bar. Inside, there is a small icon of a notepad and pencil. The form contains three input fields: 'Patron Name' with the text 'Sarah Student', 'Note Type' with a dropdown arrow, and 'Last Modified' which is empty. Below these fields is a large, empty text area with a vertical scrollbar on the right. At the bottom of the dialog are four buttons: 'New', 'Save', 'Delete', and 'Close'.

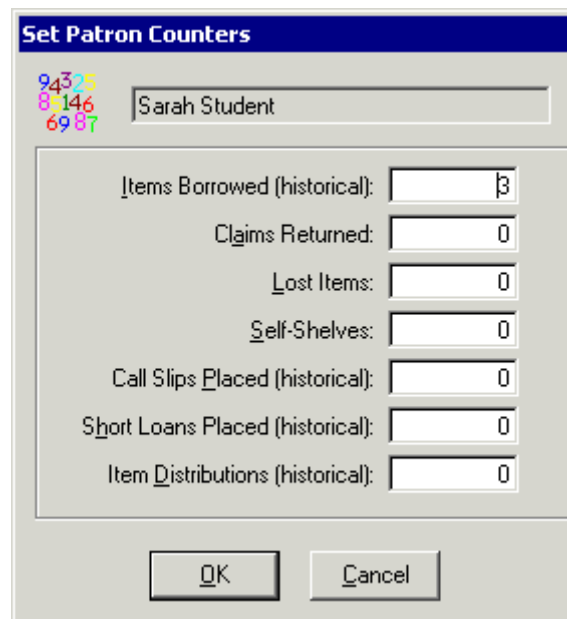
**Figure 4-6. Notes Dialog Box**

See [Patron Notes](#) on [page 4-126](#) for additional information on patron notes.

## Counters

The **Counters** button opens the **Set Patron Counters** dialog box (see [Figure 4-7](#)).

---



The **Set Patron Counters** dialog box is shown. It has a title bar with the text "Set Patron Counters". Below the title bar, there is a text box containing the name "Sarah Student". To the left of the text box, there are four small, colorful icons: a yellow "94325", a red "85146", a green "6987", and a blue "3". Below the text box, there are seven rows of labels and input fields:

Label	Value
Items Borrowed (historical):	3
Claims Returned:	0
Lost Items:	0
Self-Shelves:	0
Call Slips Placed (historical):	0
Short Loans Placed (historical):	0
Item Distributions (historical):	0

At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

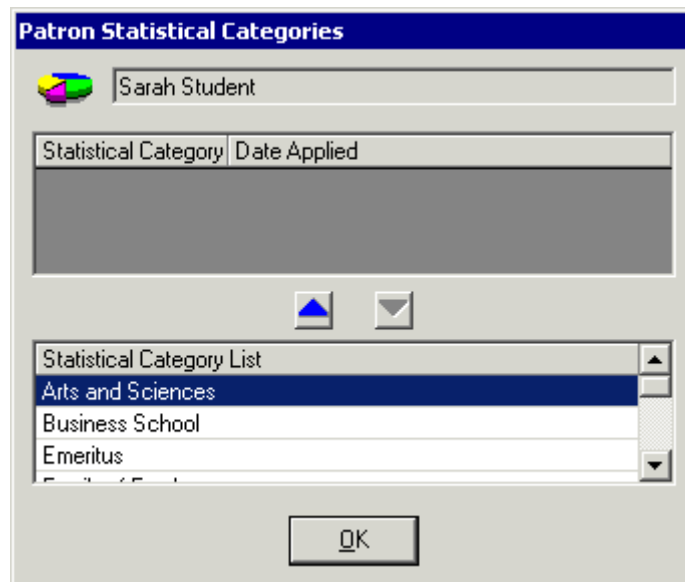
---

**Figure 4-7. Counters Dialog Box**

See [Setting Patron Counters](#) on [page 4-134](#) for additional information on patron counters.

## Statistics

The **Statistics** button opens the **Patron Statistical Categories** dialog box (see [Figure 4-8](#)).



**Figure 4-8. Patron Statistical Categories Dialog Box**

[Patron Statistical Information](#) on [page 4-139](#) for additional information on patron statistics.

## Patron Record Tabs

There are five tabs that display in the lower portion of the **Patron Record** dialog box. These tabs provide additional information about the patron.

### Patron ID Tab

The **Patron ID** tab includes barcode information as well as the Patron Groups with which the patron is associated (see [Figure 4-9](#)).

Patron Id	Details	Address/Phone	Counters	Proxy Patrons	History
Barcode	Patron Group	Status/Date	Operator Id		
12121	Graduate Student	Active - 7/18/2012	demo		

Institution Id:  SSN: 355321212

---

**Figure 4-9. Patron ID Tab of a Patron Record**

[Table 4-2](#) describes the **Patron ID** tab.

**Table 4-2. Patron ID tab**

Name	Description
Barcode	Patron's barcode.
Patron Group	Patron group to which the patron belongs.
Status/Date	Current status of the barcode and the date that status was applied.
Operator ID	Name of the operator who added the barcode to the patron record.
Institution ID	Patron's institution ID.
SSN	Patron's social security number.  <b>NOTE:</b> This will appear as xxx-xx-xxxx if the <b>Mask Patron Social Security Number</b> check box is selected in the operator's circulation security profile.

### Details Tab

The **Details** tab includes barcode information as well as the Patron Groups with which the patron is associated (see [Figure 4-10](#)).

Patron Id	Details	Address/Phone	Counters	Proxy Patrons	History
SMS Number: <input type="text"/> Expires: <input type="text" value="9/21/2014"/> Purge: <input type="text" value="9/30/2014"/> Department: <input type="text"/> Major: <input type="text"/> Birth Date: <input type="text"/>					

**Figure 4-10. Details Tab of a Patron Record**

[Table 4-2](#) describes the **Details** tab.

**Table 4-3. Details tab**

Name	Description
SMS Number	<p>This is the mobile device number to which SMS messages (circulation notices) may be sent.</p> <p>This number includes the country code and area code.</p> <p>Examples:</p> <p>12223334444</p> <p>1-222-333-4444</p> <p>1 (222) 333-4444</p> <p>+61 9 1234 1234</p> <p>61912341234</p> <p>This field permits alphanumeric characters, punctuation, and spaces up to 50 characters in length.</p> <p>Optionally, patrons may enter their SMS numbers from the WebVoyáge Patron Information page.</p> <p><b>NOTE:</b> Phone numbers display in a patron record exactly as they are entered.</p>
Expires	<p>Record's expiration date.</p> <p>At 00:00 00 hours on this date, the patron will be blocked from charging or renewing items.</p>

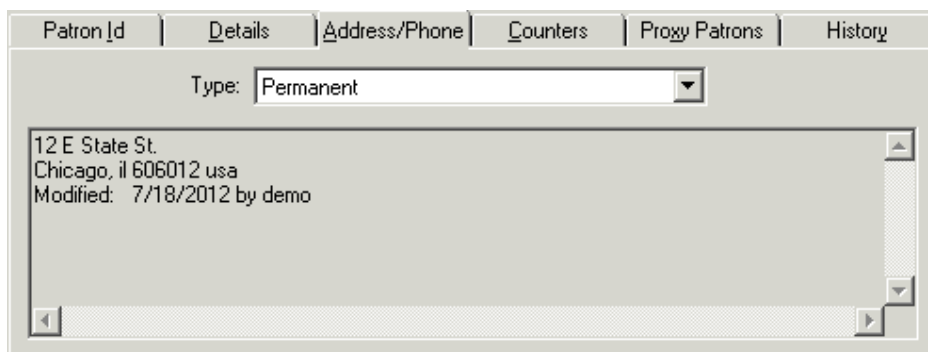
**Table 4-3. Details tab**

Name	Description
Purge Date	Record's purge date. A purge date is the date you want the record deleted from the patron database.
Department	This is the patron's department.
Major	This is the patron's major.
Birth Date	This is the patron's birth date.

### Address/Phone Tab

The **Address/Phone** tab lists all the addresses and phone numbers that are currently included in the patron record (see [Figure 4-11](#)).

---

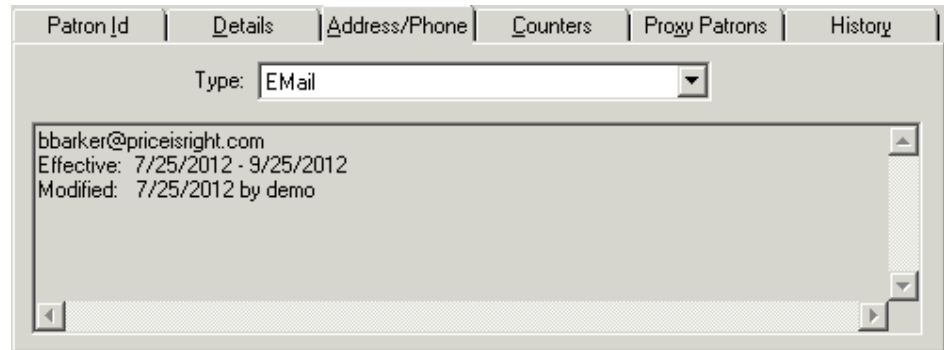
**Figure 4-11. Address/Phone Tab for a Patron Record**

[Table 4-4](#) describes the **Address/Phone** tab.

**Table 4-4. Address/Phone Tab**

Name	Description
Type	Type of address Permanent (see <a href="#">Figure 4-11</a> ), Temporary, or e-mail (see <a href="#">Figure 4-12</a> ). Choose the type of address from the drop-down list. The address display updates to display the correct address information.
Center section of the tab	Address/phone information for the address type selected.





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

Type: E-Mail

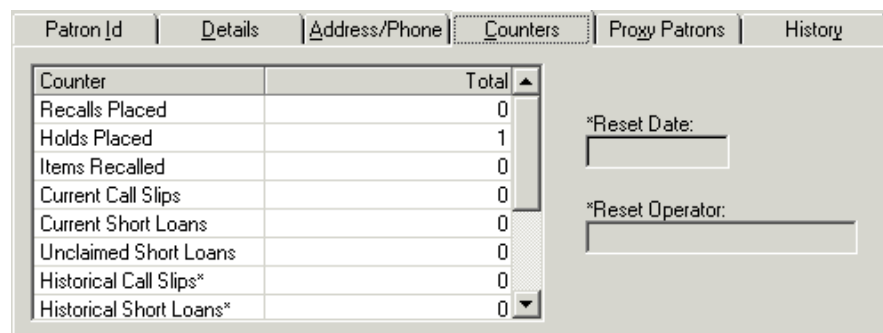
bbarker@priceisright.com  
Effective: 7/25/2012 - 9/25/2012  
Modified: 7/25/2012 by demo

Figure 4-12. Address/Phone Tab with the E-mail Address Type

### Counters tab

This tab lists the counters that are referenced when the system checks to see if a patron has reached any of the limits specified on the **Patron** tab of the **Circulation - Policy Definitions** workspace in the System Administration module, such as checking a patron's Maximum Lost Items limit. If a patron's lost item limit has been reached, the patron is blocked from charging any additional items.

The **Counters** tab lists all the transactions counters and totals for the patron record (see [Figure 4-13](#)).



Counter	Total
Recalls Placed	0
Holds Placed	1
Items Recalled	0
Current Call Slips	0
Current Short Loans	0
Unclaimed Short Loans	0
Historical Call Slips*	0
Historical Short Loans*	0

\*Reset Date:

\*Reset Operator:

Figure 4-13. Counters Tab of a Patron Record

[Table 4-5](#) describes the **Counters** tab.

**Table 4-5. Counters Tab**

Name	Description
Recalls Placed	Number of pending recalls.
Holds Placed	Number of pending holds.
Items Recalled	Number of items charged to the patron for which there is a pending recall request.
Current Call Slips	Number of pending callslip requests.
Current Short Loans	Number of pending short loan requests.
Unclaimed Short Loans	Total number of unclaimed loan requests.
Historical Call Slips	Total number of callslip requests that have been charged and discharged.
Historical Short Loans	Total number of short loan requests that have been charged and discharged
Historical Charges	Total number of items that have been charged and discharged.
Historical Distributions	Total number of items distributed to patron.
Claims Returned	Total number of times a patron claims to have returned an item.
Lost Items	Total number of items recorded as lost.
Self-Shelves	Total number of times a patron has apparently self-shelved an item.
Reset Date	Last date one of the counters was reset.
Reset Operator	Last operator to reset one of the counters.

See [Setting Patron Counters](#) on [page 4-134](#) for more information on patron counters.

## Proxy Patrons Tab

The **Proxy Patrons** tab lists the name of patrons who are proxys for another patron (see [Figure 4-14](#)). That is, the patrons listed on the tab may charge items for the patron whose record is displayed.

Patron Name	Patron Barcode	Patron Group	Expires	Created
Learner, Lana	245245245	Undergraduate Student	12/16/2002	12/19/2002 by
Student, Sarah	STUDENT1	Undergraduate Student	10/31/2003	10/18/2002 by

**Figure 4-14. Proxy Patron Tab**

[Table 4-6](#) describes the **Proxy Patrons** tab.

**Table 4-6. Proxy Patrons Tab**

Name	Description
Proxies for	Barcode and patron group of the sponsor patron.
Patron Name	Proxy patron's name.
Patron Barcode	Proxy patron's barcode.
Patron Group	Proxy patron's patron group.
Expires	Date on which a patron can no longer act as proxy to the sponsor patron.
Created	Time, operator ID, and location at which this proxy patron was added to the sponsor patron's list.

See [Creating Proxy Patrons](#) on [page 4-145](#) for more information.

## History Tab

The **History** tab keeps a record of the dates on which the patron record was created or updated as well as the operator and location at which the action took place (see [Figure 4-15](#)).

Patron Id	Details	Address/Phone	Counters	Proxy Patrons	History
Registered: <input type="text"/>					
Created: <input type="text" value="10/18/2002"/>		by: <input type="text" value="demo"/>	at: <input type="text" value="Circulation Desk"/>		
Updated: <input type="text" value="6/29/2012"/>		by: <input type="text" value="SYSTEM"/>	at: <input type="text" value="Circulation Desk"/>		
Suspend Until: <input type="text"/>					

**Figure 4-15. History Tab of the Patron Record**

[Table 4-7](#) describes the **History** tab.

**Table 4-7. History Tab**

Name	Description
Registered	Date the patron record was loaded into the patron database through a patron load/update job.
Created/by/at	Date the patron record was created, by whom, and at which location.
Updated/by/at	Date the patron record was updated, by whom, and at which location.
Expires	Date the patron's record expires. After this date, the patron is blocked from charging items.
Suspended Until	Last date that the patron's record is suspended. See <a href="#">Manually Suspending a Patron Record</a> on <a href="#">page D-38</a> .
Purge	Date the patron's record is eligible to be purged from the patron database.  <b>NOTE:</b> For more information on purging patron records, see circjob 39 in the Technical User's Guide.

## Creating a Patron Record

Operators with the proper authority may create patron records using the Circulation module. This can be done in two places in the Circulation module, the **Patron** workspace and the **Charge** workspace on the **Add New Patron Record** dialog box (see [Figure 4-16](#)).

**Figure 4-16. Add New Patron Record Dialog Box**

The **Add New Patron Record** dialog box contains the following tabs:

- **Name**
- **Barcode**
- **Address**
- **Phone**

In addition to the tabs, this dialog box contains a **Patron Record** box. After entering and saving the new patron data on the tabs, the information displays on the right side of the dialog box in the **Patron Record** box.

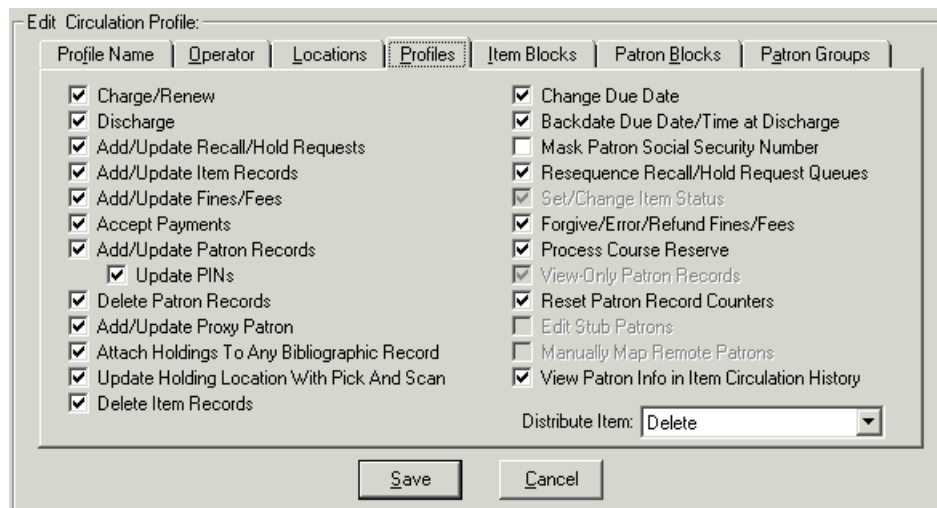
**NOTE:**

Patron records may also be added using the Patron Update batch job on the server. See the *Voyager Technical User's Guide* for more information on this batch job.

## Security

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Depending on your security profile, you may be allowed to add or edit patron records. Operators that have the **Add/Update Patron Records** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to do this (see [Figure 4-17](#)).



**Figure 4-17. Add/Update Patron Records on the Profiles Tab**

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

## Name Tab

---

Use the **Name** tab (see [Figure 4-16](#)) of the **Add New Patron Record** dialog box to add patron name information.

[Table 4-8](#) describes the **Add New Patron Record** dialog box **Name** tab.

**Table 4-8. Name Tab of the Add New Patron Record Dialog Box**

Name	Description	Required	Range
Last	Patron's last name.	Yes	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  50 characters
First	Patron's first name.	No	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  50 characters
Middle	Patron's middle name.	No	Alphanumeric, punctuation, and spaces.  Uppercase and lowercase allowed  50 characters
Title	Patron's title.	No	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  20 characters
Name Type	Type of name used on this patron record.	Yes	Personal name or Institution name  Personal name is the default.
Institution ID	If you use an institution-supplied identification for patrons, this is the patron's institution ID.	Either an institution ID or a social security number is required.	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  30 characters

**Table 4-8. Name Tab of the Add New Patron Record Dialog Box**

Name	Description	Required	Range
SSN	If you use social security numbers for patron identification, this is the patron's social security number.  <b>NOTE:</b> This field is not visible if the <b>Mask Patron Social Security Number</b> check box is selected in the operator's circulation security profile.	Either an institution ID or a social security number is required.	Numeric 9 characters
Save button	Saves the patron data.  <b>NOTE:</b> This button is available from all the tabs.		Button
Delete button	Deletes the patron record.  <b>NOTE:</b> This button is available from all the tabs.	Only active if the patron record has been saved.	Button
OK button	Displays a message asking the operator if they want to save the patron record.  <b>NOTE:</b> This button is available from all the tabs.		Button

---

**Details Tab**

Use the **Details** tab (see [Figure 4-18](#)) of the **Add New Patron Record** dialog box to add patron details (such as expiration information).



**Add New Patron Record**

Name   Details   Barcode   Address   Phone

SMS Number:

Expires:  ...   Purge Date:  ...

Department:

Major:

Birth Date:  ...

**Figure 4-18. Details Tab of the Add New Patron Dialog Box**

[Table 4-9](#) describes the **Add New Patron Record** dialog box **Details** tab.

**Table 4-9. Details Tab of the Add New Patron Record Dialog Box**

Name	Description	Required	Range
SMS Number	This is the patron's mobile device number to which circulation notices may be sent. Include the country code (1 for the United States).  Examples: 12223334444 1-222-333-4444 1 (222) 333-4444	No	Numeric
Expires	Record's expiration date.  At 00:00 00 hours on this date, the patron will be blocked from charging or renewing items.	No	Date

**Table 4-9. Details Tab of the Add New Patron Record Dialog Box**

Name	Description	Required	Range
Purge Date	Record's purge date. A purge date is the date you want the record deleted from the patron database.	No	Date
Department	This is the patron's department.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 50 characters
Major	This is the patron's major.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 50 characters
Birth Date	This is the patron's birth date.	No	Date

**Barcode Tab**

---

Use the **Barcode** tab (see [Figure 4-19](#)) of the **Add New Patron Record** dialog box to add patron barcode information.

The screenshot shows a window titled "Add New Patron Record" with five tabs: Name, Details, Barcode, Address, and Phone. The "Barcode" tab is selected. Inside the tab, there is a "New Barcode:" label followed by a text input field. Below that is a "Patron Group" label followed by a dropdown menu. The dropdown menu is open, displaying a list of patron groups: Bindery, Carrel, Courtesy Patron, Faculty, Global item limit test, Graduate Student, Inter-Library Loan, and Primo.

Figure 4-19. Barcode Tab of the Add New Patron Dialog Box

[Table 4-10](#) describes the **Add New Patron Record** dialog box **Barcode** tab.

Table 4-10. Barcode Tab of the Add New Patron Record Dialog Box

Name	Description	Required	Range
New Barcode	Patron's barcode  <b>NOTE:</b> A patron can have multiple barcodes but the barcodes must be assigned to different patron groups.	No	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  25 characters
Patron Group	Patron's patron group.	Yes	Select from drop-down menu.

**Address Tab**

Use the **Address** tab (see [Figure 4-20](#)) of the **Add New Patron Record** dialog box to add patron address information.

Patron must have a permanent address. The first address entered into a patron record is considered the permanent address.

---

The screenshot shows a dialog box titled "Add New Patron Record". It has five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Address" tab is selected. Inside the dialog, there are five text input fields labeled "Line 1:", "Line 2:", "Line 3:", "Line 4:", and "Line 5:". Below these are four more text input fields: "City:", "State/Prov.:", "Zip/Postal:", and "Country:". The "City:" and "State/Prov.:" fields are on the same line, and "Zip/Postal:" and "Country:" are on the line below.

---

**Figure 4-20. Address Tab of the Add New Patron Dialog Box**

[Table 4-11](#) describes the **Add New Patron Record** dialog box **Address** tab.

**Table 4-11. Address Tab of the Add New Patron Record Dialog Box**

Name	Description	Required	Range
Line 1 through Line 5	Patron's street address.	Must enter information on Line 1.	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  100 characters

**Table 4-11. Address Tab of the Add New Patron Record Dialog Box**

Name	Description	Required	Range
City	City associated with this address.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 40 characters
State/ Prov.[inca]	State or province associated with this address.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 7 characters
Zip/Postal	Zip or postal code associated with this address.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 20 characters
Country	Country associated with this address.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 20 characters

### Phone Tab

---

Use the **Phone** tab (see [Figure 4-21](#)) of the **Add New Patron Record** dialog box to add patron telephone number information.

The first telephone number added to a new patron record is attached to the permanent address. Any additional addresses added to the patron record require phone number information.



The screenshot shows a dialog box titled "Add New Patron Record". It has five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Phone" tab is selected. Inside the dialog, there is a label "Phone:" followed by a text input field.

---

**Figure 4-21. Phone Tab of the Add New Patron Dialog Box**

[Table 4-12](#) describes the **Add New Patron Record** dialog box **Phone** tab.

**Table 4-12. Phone Tab of the Add New Patron Record Dialog Box**

Name	Description	Required	Range
Phone	Patron's phone number, including the area code.  <b>NOTE:</b> Phone numbers display in a patron record exactly as they are entered. There is no specified format for entering phone information.	No	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  25 characters

The procedure for adding a new patron record is shown in [Procedure 4-1, Adding a New Patron Record in the Circulation Module](#).



### Procedure 4-1. Adding a New Patron Record in the Circulation Module

Use the following steps to add a new patron record:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Click the **Cancel** button on the **Patron Search** dialog box.

Result: An empty **Patron Record** dialog box opens (see [Figure 4-22](#)).

**Figure 4-22. Empty Patron Record Dialog Box**

3. Select **Add Patron (Ctrl + A)** from the **Patron** menu (or right-click and select the same command from the submenu).

Result: The **Add New Patron Record** dialog box opens.

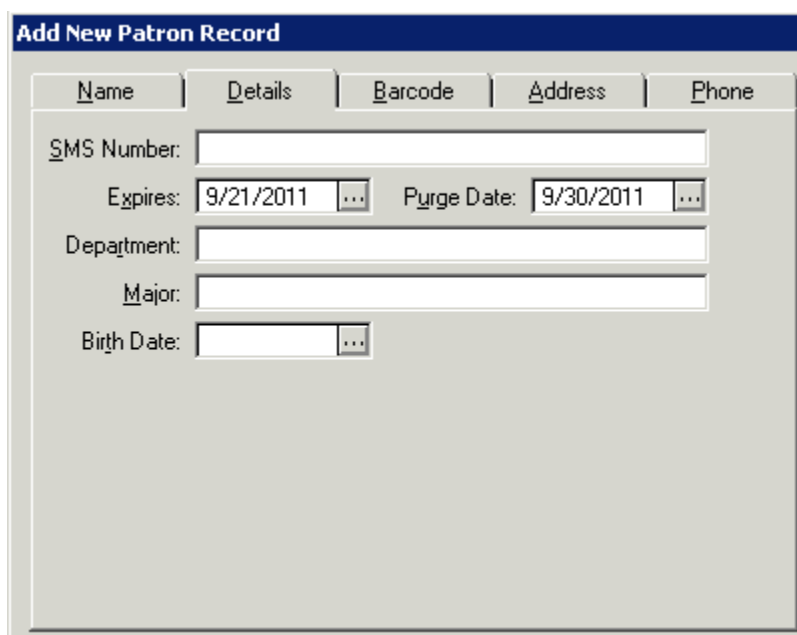
4. Complete the information on the **Name** tab.

Result: The **Name** tab is completed.

5. Click the **Details** tab.

Result: The **Add New Patron Record** dialog box displays the **Details** tab (see [Figure 4-23](#)).

---

The screenshot shows a dialog box titled "Add New Patron Record" with a dark blue header. Below the header are five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Details" tab is selected and active. It contains several input fields: "SMS Number:" followed by a text box; "Expires:" followed by a date box containing "9/21/2011" and a calendar icon; "Purge Date:" followed by a date box containing "9/30/2011" and a calendar icon; "Department:" followed by a text box; "Major:" followed by a text box; and "Birth Date:" followed by a date box with a calendar icon.

---

**Figure 4-23. Details Tab of the Add New Patron Record Dialog Box**

6. Enter the details:
  - a. Enter the patron's SMS number in the **SMS Number** field.
  - b. Use the Calendar dialog box (see [Figure 4-24](#)) to select the patron's expiration date for the **Expires** field.
  - c. Use the Calendar dialog box (see [Figure 4-24](#)) to select the patron's purge date for the **Purge Date** field. On this date the system will remove the patron record.
  - d. Enter the patron's department in the **Department** field.



- e. Enter the patron's major in the **Major** field.
- f. Use the Calendar dialog box (see [Figure 4-24](#)) to select the patron's birth date for the **Birth Date** field.



**Figure 4-24.** Calendar Dialog Box Used for Date Entry

Result: The **Details** tab is completed. [Figure 4-25](#) shows an example of a completed **Details** tab.

The screenshot shows a software window titled "Add New Patron Record" with a blue header bar. Below the header is a tabbed interface with five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Details" tab is currently selected. The form contains several input fields: "SMS Number" with the value "847-227-2688", "Expires" with "9/21/2012" and a dropdown arrow, "Purge Date" with "9/30/2012" and a dropdown arrow, "Department" with "Business", "Major" with "Finance", and "Birth Date" with "8/17/1992" and a dropdown arrow. The background of the form is light gray.

---

**Figure 4-25. Example of a Completed Details Tab**

7. Click the **Barcode** tab.

Result: The **Add New Patron Record** dialog box updates to display the **Barcode** tab and the fields for barcode information (see [Figure 4-26](#)).

The screenshot shows a dialog box titled "Add New Patron Record" with a dark blue header. Below the header are five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Barcode" tab is currently selected. Inside the dialog, there are two main input fields. The first is labeled "New Barcode:" and is followed by a text input box. The second is labeled "Patron Group" and is followed by a drop-down menu. The drop-down menu is open, showing a list of patron groups: "Bindery", "Carrel", "Courtesy Patron", "Faculty", "Global item limit test", "Graduate Student", "Inter-Library Loan", and "Primo".

**Figure 4-26. Barcode Tab of the Add New Patron Record Dialog Box**

8. Enter the barcode information.
  - a. Enter the patron's barcode in the **New Barcode** field.
  - b. Select the patron's patron group from the drop-down list in the **Patron Group** field.

Result: The **Barcode** tab is completed. [Figure 4-27](#) shows an example of a completed **Barcode** tab.

The screenshot shows a dialog box titled "Add New Patron Record" with a blue header bar. Below the header are five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Barcode" tab is currently selected. The main area of the dialog is light gray and contains two input fields. The first field is labeled "New Barcode:" and contains the text "mm12345". The second field is labeled "Patron Group" and is a dropdown menu with "Graduate Student" selected.

---

**Figure 4-27. Example of a Completed Barcode Tab**

9. Click the **Address** tab.

Result: The **Add New Patron Record** dialog box updates to display the **Address** tab and the fields for address information (see [Figure 4-28](#)).

The screenshot shows a dialog box titled "Add New Patron Record" with a dark blue header. Below the header are five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Address" tab is currently selected. The main area of the dialog contains five horizontal text input fields labeled "Line 1:", "Line 2:", "Line 3:", "Line 4:", and "Line 5:". Below these are four more input fields arranged in two rows and two columns: "City:" and "State/Prov.:" in the top row, and "Zip/Postal:" and "Country:" in the bottom row. All input fields are empty.

**Figure 4-28. Address Tab of the Add New Patron Record Dialog Box**

10. Enter the address information.

Result: The **Address** tab is completed. [Figure 4-29](#) shows an example of a completed **Address** tab.

The screenshot shows a dialog box titled "Add New Patron Record" with a dark blue header. Below the header are five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Address" tab is currently selected. The main area of the dialog contains five text input fields labeled "Line 1:" through "Line 5:". "Line 1:" contains "123 Main Street" and "Line 2:" contains "Apartment 2". Below these are four empty input fields. At the bottom, there are four more input fields: "City:" with "Des Plaines", "State/Prov.:" with "IL", "Zip/Postal:" with "60018", and "Country:" with "USA".

---

**Figure 4-29. Example of a Completed Address Tab**

11. Click the **Phone** tab.

Result: The **Add New Patron Record** dialog box updates to display the **Phone** tab and the fields for telephone information (see [Figure 4-30](#)).

12. Enter the patron's telephone number, including area code, in the **Phone** field.



The screenshot shows a dialog box titled "Add New Patron Record" with a dark blue header. Below the header is a tabbed interface with five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Phone" tab is selected and active. The main area of the dialog is light gray. In the center of this area, the text "Phone:" is followed by a white rectangular input field with a thin black border.

---

**Figure 4-30. Phone Tab of the Add New Patron Record Dialog Box**

Result: The **Phone** tab is completed. [Figure 4-31](#) shows an example of a completed **Phone** tab.



The screenshot shows a dialog box titled "Add New Patron Record" with a blue header bar. Below the header is a tabbed interface with five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Phone" tab is currently selected. The main area of the dialog is light gray. In the center, there is a label "Phone:" followed by a text input field containing the number "847-296-2200".

---

**Figure 4-31. Example of a Completed Phone Tab**

13. Click the **Save** button to save the record.

Result: The system saves the new patron record. The **Add New Patron Record** dialog box automatically updates to the **Edit Patron Record** dialog box. The patron record information populates the **Patron Record** on the right side of the dialog box.

**OPTIONAL:**

14. Once new patron information is saved the **Delete** button is available. If you click the **Delete** button, a confirmation message displays (see [Figure 4-32](#)). If you click **Yes**, the system deletes the patron record and returns to a blank patron record. If you click **No**, the system returns to the **Edit Patron Record** dialog box.



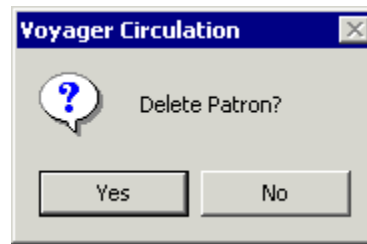


Figure 4-32. Delete Patron Record Confirmation Message

**OPTIONAL:**

15. While adding a patron record, if you click the **OK** button, the message in [Figure 4-33](#) displays. If you click **Yes**, the system saves the patron record and returns to the **Patron Record** dialog box. If you click **No**, the system returns to and returns to a blank patron record.

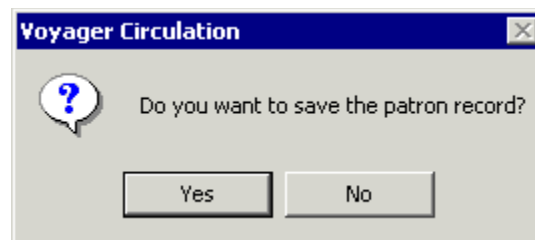


Figure 4-33. Message Seen After Clicking the OK Button Without Saving



**IMPORTANT:**

Also, once you have entered and saved the initial patron information, you can then add multiple barcodes, addresses, and telephone numbers to the patron record. See [Adding Multiples Barcodes, Addresses, and Phone Numbers to a Patron Record](#) on [page 4-54](#).

## Error and Warning Messages

When creating or adding a new patron record, the system will display error or warning messages if necessary.

If the operator tries to save a new patron record before all of the necessary required information is provided, that is last name, patron group, and line 1 of the address, the system will display the appropriate error message.

For example, if you attempt to save a record that has no patron group, an error message displays (see [Figure 4-34](#)). This error must be corrected before saving the record. Clicking **OK** places the cursor in the field where the information is missing.



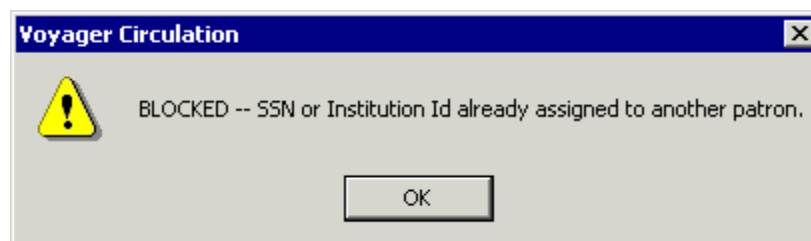
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**Figure 4-34. Error Message When There Is No Patron Group Provided**

**NOTE:**

The system allows a record to be added without a patron barcode and provides no warning.

If a duplicate Institution ID or Social Security Number is provided, the message in [Figure 4-35](#) displays. Clicking the **OK** button closes the message. The operator must click the **Name** tab (if necessary) and correct the duplication before saving the record.



---

**Figure 4-35. Message Stating That the SSN or Institution ID Is Already in Use**

If the operator attempts to save the record without an Institution ID or Social Security Number, the system allows it. However, a warning message displays (see [Figure 4-36](#)).

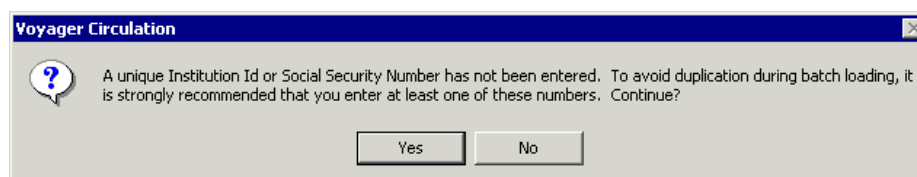


Figure 4-36. Warning Message When No SSN or Institution ID Is Provided

## Editing a Patron Record

The **Edit Patron Record** dialog box allows the operator, with appropriate security, to edit an existing patron record.

### Security

Depending on your security profile, you may be allowed to edit patron records. Operators that have the **Add/Update Patron Records** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to do this (see [Figure 4-17 on page 4-20](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

### Name Tab

Use the **Name** tab to edit patron name information.

#### NOTE:

This tab is the same on the **Edit Patron Record** dialog box and the **Add New Patron Record**.

[Table 4-13](#) describes the **Edit Patron Record** dialog box **Name** tab.

**Table 4-13. Name Tab of the Edit Patron Record Dialog Box**

Name	Description	Required	Range
Last	Patron's last name.	Yes	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  50 characters
First	Patron's first name.	No	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  50 characters
Middle	Patron's middle name.	No	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  50 characters
Title	Patron's title.	No	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  20 characters
Name Type	Type of name used on this patron record.	Yes	Personal name or Institution name  Personal is the default
Institution ID	If you use institution-supplied identification for patrons, this is the patron's institution ID.	Either an institution ID or a social security number is required.	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  30 characters

**Table 4-13. Name Tab of the Edit Patron Record Dialog Box**

Name	Description	Required	Range
SSN	<p>If you use social security numbers for patron identification, this is the patron's social security number.</p> <p><b>NOTE:</b> This field is not visible if the <b>Mask Patron Social Security Number</b> check box is selected in the operator's circulation security profile.</p>	Either an institution ID or a social security number is required.	Numeric 9 characters
Save button	<p>Saves the patron data.</p> <p><b>NOTE:</b> This button is available from all the tabs.</p>		Button
Delete button	<p>Deletes the patron record.</p> <p><b>NOTE:</b> This button is available from all the tabs.</p>	Only active if the patron record has been saved.	Button
OK button	<p>Displays a message asking the operator if they want to save the patron record.</p> <p><b>NOTE:</b> This button is available from all the tabs.</p>		Button

### Details Tab

---

Use the **Details** tab to edit the patron's detailed information.

The screenshot shows a window titled "Edit Patron Record". It has five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Details" tab is selected. Inside the "Details" tab, there are several input fields: "SMS Number:" followed by a text box; "Expires:" followed by a date box containing "9/21/2014" and a dropdown arrow; "Purge Date:" followed by a date box containing "9/30/2014" and a dropdown arrow; "Department:" followed by a text box; "Major:" followed by a text box; and "Birth Date:" followed by a date box with a dropdown arrow.

---

**Figure 4-37. Details Tab of the Edit Patron Record Dialog Box**

**NOTE:**

This tab is the same on the **Edit Patron Record** dialog box and the **Add New Patron Record**.

[Table 4-14](#) describes the **Edit Patron Record** dialog box **Details** tab.

**Table 4-14. Details Tab of the Edit Patron Record Dialog Box**

Name	Description	Required	Range
SMS Number	This is the patron's mobile device number to which circulation notices may be sent. Include the country code (1 for the United States).  Examples: 12223334444 1-222-333-4444 1 (222) 333-4444	No	Numeric

**Table 4-14. Details Tab of the Edit Patron Record Dialog Box**

Name	Description	Required	Range
Expires	Record's expiration date. At 00:00 00 hours on this date, the patron will be blocked from charging or renewing items.	No	Date
Purge Date	Record's purge date. A purge date is the date you want the record deleted from the patron database.	No	Date
Department	This is the patron's department.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 50 characters
Major	This is the patron's major.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 50 characters
Birth Date	This is the patron's birth date.	No	Date

### Barcode Tab

---

Use the **Barcode** tab ([Figure 4-38](#)) of the **Edit Patron Record** dialog box to edit patron barcode information.

The screenshot shows a dialog box titled "Edit Patron Record" with a blue header bar. Below the header are five tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Barcode" tab is selected. The main area of the dialog contains three fields: "Status:" with a dropdown menu showing "Active", "Barcode:" with a text box containing "12121", and "Patron Group:" with a text box containing "Graduate Student".

**Figure 4-38. Barcode Tab of the Edit Patron Record Dialog Box**

[Figure 4-39](#) shows the **Status** field drop-down menu options.

The screenshot shows a close-up of the "Status:" dropdown menu. The menu is open, displaying a list of options: "Active", "Lost", "Stolen", "Expired", and "Other". The "Active" option is currently selected and highlighted in blue.

**Figure 4-39. Status Field Drop-down Menu Options**



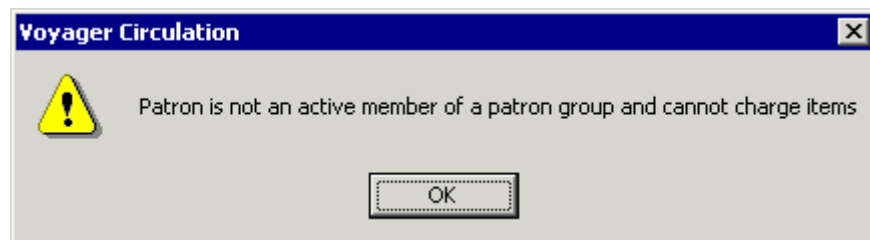
[Table 4-15](#) describes the **Edit Patron Record** dialog box **Barcode** tab.

**Table 4-15. Barcode Tab of the Edit Patron Record Dialog Box**

Name	Description	Required	Range
Status	Status of the barcode displaying. <ul style="list-style-type: none"> <li>• Active</li> <li>• Lost</li> <li>• Stolen</li> <li>• Expired</li> <li>• Other</li> </ul> These are system-supplied and may not be altered.	Yes	Select from drop-down menu.
Barcode	Patron's barcode. This is a non-editable field.  <b>NOTE:</b> A patron can have multiple barcodes but the barcodes must be assigned to different patron groups.	Yes	
Patron Group	Patron's patron group. This is a non-editable field.	Yes	

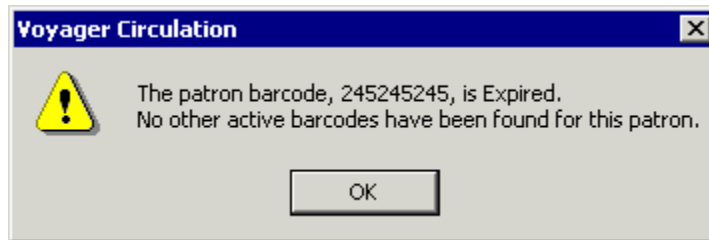
### Barcode Status Error Messages

If the operator edits the status of the barcode such that the patron does not have any active barcodes when attempting to charge an item, they will be stopped (see [Figure 4-40](#)).



**Figure 4-40. No Active Barcode(s) for This Patron**

If the operator edits the status of the barcode to be Lost, Stolen, or Expired and the patron does not have any active barcodes when attempting to charge an item, they will be stopped. [Figure 4-41](#) shows an example of the warning message when the patron's barcode status is expired.



---

**Figure 4-41. Expired Barcode with No Active Barcode(s) for This Patron**

## **Address Tab**

---

Use the **Address** tab (see [Figure 4-42](#)) of the **Edit Patron Record** dialog box to edit patron address information.

**Edit Patron Record**

Name Details Barcode Address Phone

Type: Permanent ☐ Hold Mail ☐ Protect

Line 1: 12 E State St.  
 Line 2:  
 Line 3:  
 Line 4:  
 Line 5:

City: Chicago State/Prov.: il  
 Zip/Postal: 606012 Country: usa

**Figure 4-42.** Address Tab of the Edit Patron Record Dialog Box

[Table 4-11](#) describes the **Edit Patron Record** dialog box **Address** tab.

**Table 4-16.** Address Tab of the Edit Patron Record Dialog Box

Name	Description	Required	Range
Type	Type of address. There are three address types, permanent, temporary, and e-mail.	One and only one permanent address is required.	Options <ul style="list-style-type: none"> <li>• Permanent</li> <li>• Temporary</li> <li>• E-mail</li> </ul>
Effective	Dates that the address displaying is in effect.  The system checks effective dates when considering an address for Circulation notices.  <b>NOTE:</b> Effective dates are used with Temporary and E-mail addresses only.	A beginning date is required, and end date is not.	Date

**Table 4-16. Address Tab of the Edit Patron Record Dialog Box**

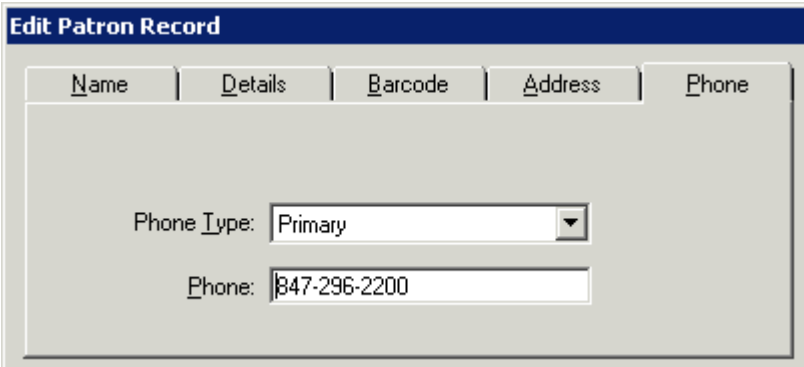
Name	Description	Required	Range
Hold Mail check box	When selected, the system will not choose that address for Circulation notices.  <b>NOTE:</b> If the Hold Mail option is selected for the permanent address the patron is blocked at Charge/Renew.	No	Check box
Protect check box	When selected, the address is protected from being changed during a patron update.	No	Check box
Line 1 through Line 5	Patron's street address.	Must enter information on Line 1.	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 100 characters
City	City associated with this address.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 40 characters
State/Prov.[incc]	State or province associated with this address.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 7 characters
Zip/Postal	Zip or postal code associated with this address.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 20 characters

**Table 4-16. Address Tab of the Edit Patron Record Dialog Box**

Name	Description	Required	Range
Country	Country associated with this address.	No	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  20 characters

**Phone Tab**

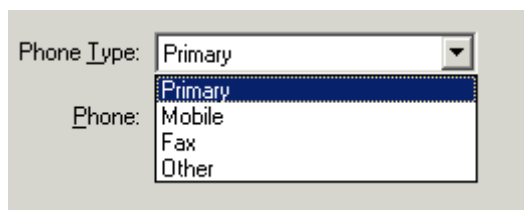
Use the **Phone** tab (see [Figure 4-21](#)) of the **Edit Patron Record** dialog box to add patron telephone number information.



The screenshot shows the 'Edit Patron Record' dialog box with the 'Phone' tab selected. The 'Phone Type' dropdown menu is set to 'Primary', and the 'Phone' text field contains the number '847-296-2200'.

**Figure 4-43. Phone Tab of the Edit Patron Record Dialog Box**

[Figure 4-44](#) shows the **Phone Type** field drop-down menu options.



---

**Figure 4-44. Phone Type field drop-down menu options**

[Table 4-17](#) describes the **Edit Patron Record** dialog box **Phone** tab.

**Table 4-17. Phone Tab of the Edit Patron Record Dialog Box**

Name	Description	Required	Range
Phone Type	Type of phone number displaying. <ul style="list-style-type: none"><li>• Primary</li><li>• Mobile</li><li>• Fax</li><li>• Other</li></ul> These are system-supplied and may not be altered.	Yes	Select from drop-down menu.
Phone	Patron's phone number.	No	

The procedure for editing a patron record is shown in [Procedure 4-2, Editing a Patron Record](#).



---

#### **Procedure 4-2. Editing a Patron Record**

---

Use the following steps to edit a patron record:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for a patron record and display it. See [Searching for a Patron Record](#) on [page 3-2](#).

3. Select **Edit Patron (Ctrl + E)** from the **Patron** menu or right-click and select the same command from the submenu.

Result: The **Edit Patron Record** dialog box opens (see [Figure 4-45](#)).

**Edit Patron Record**

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

Last:

First:

Middle:

Title:

Name Type:

Institution Id:

SSN:

**Patron Record**

**Name**  
Matthew Phillips

**Details**  
Graduate Student: Active

**Barcodes <new>**

**Addresses <new>**  
Permanent

**Phone Numbers <new>**

**Figure 4-45. Edit Patron Record Dialog Box**

4. Select one of the following tabs to edit:
  - a. Click the **Name** tab to edit any name, name type, Institution ID or Social Security Number, and/or expiration date information.
  - b. Click the **Details** tab to edit the patron's details (such as SMS number, birth date, and so forth).
  - c. Click the **Barcode** tab to edit the status of the barcode and select a different status from the drop-down list.
  - d. Click the **Address** tab to edit address information.
  - e. Click the **Phone** tab to edit phone number information.

**OPTIONAL:**

5. *You can also select items for editing from the **Patron Record** List on the right side of the **Edit Patron Record** dialog box. If you click any existing information (black text) in the **Patron Record** List, the dialog box updates to display the corresponding tab and information for editing. Click the red text in the Patron Record list to add multiple barcodes, addresses, or phone numbers to the patron record.*
6. Click the **Save** button when you are finished editing the patron record to save the changes.

Result: The patron record is edited.

---

## Copying Barcodes from the Patron Record

---

The Copy Barcode function enables the user to extract the barcode from the Patron record and place it on the clipboard. To copy a patron barcode, use any of the following methods:

- Type the control sequence (**Ctrl + Y**).
- Select **Copy Barcode** from the **Patron** menu.
- Select **Copy Barcode** from the right-click menu of the Patron Record dialog box.
- Type the accelerator key (**Alt + p, y**)

From the Charge and **Discharge** workspaces, the user may place the barcode directly into the Patron Barcode field by typing **Ctrl + T**. For other pasting methods, see [Pasting Barcodes into the Charge Workspace](#) and [Pasting Barcodes into the Discharge Workspace](#).

**NOTE:**

Since the clipboard only holds one piece of data, subsequent copies by any copy command that places data on the clipboard (such as **Ctrl+C**) overwrites the data.

## Adding Multiples Barcodes, Addresses, and Phone Numbers to a Patron Record

---

You can add multiple barcodes, addresses, and phone numbers to an existing patron record.



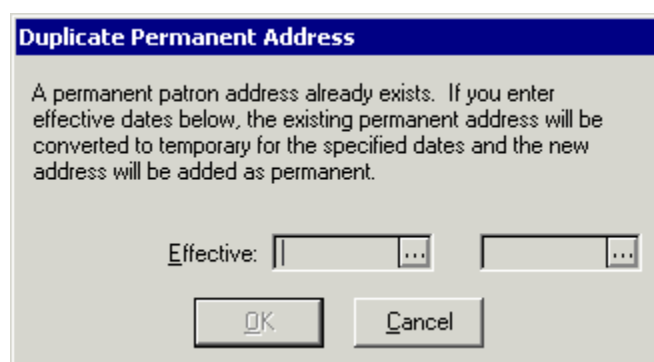
---

## Address Types

---

Address types include Permanent, Temporary, and E-mail. The following rules apply to each address type.

- A Patron Record can contain only one Permanent address. If you try to add another permanent address, a `Duplicate Permanent Address` error message (see [Figure 4-46](#)) appears. This message indicates that a permanent address currently exists and gives you the option of changing the permanent address to a temporary address by adding effective dates.



---

**Figure 4-46. Duplicate Permanent Address Error Message**

- Temporary and E-mail addresses must have effective dates. Open-ended effective dates are allowed. The system checks effective dates when considering an address for Circulation notices.
- If the **Hold Mail** check box is selected for any address type, the system will not choose that address for Circulation notices.

---

## How Voyager Chooses a Patron Address for a Circulation Notice

---

Notices are generated when Circulation batch jobs are run on the server and then printed from the Reporter module. The Reporter module must determine the address where the notice is to be sent.

For example, if a patron has overdue materials, Voyager must check settings in a number of places to determine the appropriate format for sending the notice (for example, e-mail or paper) and the appropriate address (for example, e-mail, temporary, or permanent) to which the notice should be sent before the patron receives an overdue notice.

1. The system first checks System Administration settings to determine the Circulation Policy Definitions for the location to which the overdue materials belong.

In that Circulation Policy Definition, the system checks the patron's Patron Group settings. [Figure 4-47](#) shows the option settings that are related to sending notices via e-mail.

---

<input type="checkbox"/> Email Courtesy Notices	<input checked="" type="checkbox"/> Email Cancellation Notices	<input checked="" type="checkbox"/> Email Item Available Notices
<input checked="" type="checkbox"/> Email Overdue Notices	<input type="checkbox"/> Email (Other) Overdue Notices	
<input checked="" type="checkbox"/> Email Recall Notices	<input type="checkbox"/> Email (Other) Recall Notices	

---

**Figure 4-47. E-mail Options for Circulation Patron Group Definitions**

In [Figure 4-47](#), E-mail Overdue Notices check box is selected and E-mail (Other) Overdue Notices is not selected. This means the first overdue notice is sent via e-mail and all subsequent overdue notices are sent by regular mail if the patron has valid addresses to which to send those notices.

2. Next, the system looks at the addresses in the patron record to determine if the addresses are valid.

An address is considered valid if

- The current date falls within the address's effective dates.
- The **Hold Mail** check box for the address is not selected.

If the current date is not within the effective dates for an address or **Hold Mail** is selected, the address is not considered valid and the system does not use that address for any notices.

The system checks patron addresses in the following order:

- a. E-mail addresses
- b. Temporary addresses
- c. Permanent address

### Example of Selecting an Address for a Notice

Assume the following:

- A patron belonging to the patron group, **Undergraduate Student**, has an overdue book.
- The permanent location of the book is **Main Stacks**.
- The location **Main Stacks** belongs to the **Main Circulation Group**.
- The Main Circulation Group Definitions have specified that the patron group Undergraduate Student can receive overdue notices via e-mail.
- The patron has an e-mail address defined in their patron record with effective dates of August 1, 2002 to Dec. 31, 2002 and Hold Mail is not selected.
- The patron has a temporary address defined in his patron record with the same effective dates as the e-mail address and Hold Mail is selected.
- The patron has a permanent address and Hold Mail is not selected.
- Today's date is Jan. 15, 2003.

The system determines that the patron can receive overdue notices via e-mail and checks the patron's e-mail address. Today's date falls outside of the effective dates for the patron's e-mail address, so it is ignored. Next, the system checks the patron's temporary address. The patron's temporary address has Hold Mail selected, so it is ignored. The system checks the patron's permanent address. The permanent address does not have Hold Mail selected so the system chooses the permanent address as the address for the notice. A paper notice is generated and mailed to the patron's permanent address.



#### **IMPORTANT:**

*A patron's permanent address is considered the "address of last resort". Therefore, if Hold Mail is selected for the permanent address, the patron is blocked from charging or renewing items.*

The procedure for adding multiple barcodes, address, and phone numbers to a patron record is shown in [Procedure 4-3, Adding Multiple Barcodes, Addresses, and Phone Numbers to a Patron Record](#).



### Procedure 4-3. Adding Multiple Barcodes, Addresses, and Phone Numbers to a Patron Record

---

Use the following steps to add additional barcodes, addresses, and phone numbers to an existing patron record:

1. After logging on to the Circulation module, click the **Patron** button from the Circulation toolbar, or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Edit Patron (Ctrl + E)** from the **Patron** menu, or right-click and select the same command from the submenu.

Result: The **Edit Patron Record** dialog box opens.

4. To add an additional barcode, perform the following steps:
  - a. Click **Barcodes <new>** in the **Patron Record** list.
  - b. Enter the barcode in the **New Barcode** field.
  - c. Select the patron group from the **Patron Group** drop-down (see [Figure 4-48](#)).



#### **IMPORTANT:**

*You cannot have more than one barcode per patron group. If you want your new barcode to have a patron group of an existing barcode, you must make the existing barcode inactive.*

**Figure 4-48. Adding an Additional Barcode**

- d. Click **Save** to save the barcode and update the **Patron Record** List.

If you click **OK** a message stating, "The patron barcode record has been altered. Save changes?" displays.

Responding with **Yes** saves the barcode and returns the operator to the Patron Record, responding with **No** returns the operator to the Patron Record.

The **Delete** button effects only current barcodes, it has no effect on newly-added information.

5. To add additional addresses, perform the following steps:
  - a. Click **Address <new>** in the **Patron Record** list.



**IMPORTANT:**

*The system assigns the first address provided to the address type of permanent. When adding additional addresses, operators must add to and from effective dates in the **Effective** field.*

- b. Select the type of address from the **Type** field.
- c. Enter the dates that this address will be in effect by putting the in effect from date in the first box of the **Effective** field and the in effect to date in the second box of the **Effective** field.

- d. Select the **Hold Mail** or **Protect** check boxes if wanted.
- e. Enter the address information.
  1. If adding a temporary address, enter the address information in **Line 1** to **Line 5**, see [Figure 4-49](#).

**Edit Patron Record**

Name Details Barcode Address Phone

Type: Temporary ☐ Hold Mail

Effective: ... - ... ☐ Protect

Line 1:

Line 2:

Line 3:

Line 4:

Line 5:

City:  State/Prov.:

Zip/Postal:  Country:

Patron Record

Name  
Matthew Phillips

Details

Barcodes <new>  
Graduate Student: Active

Addresses <new>  
Permanent  
Phone Numbers <new>

Save Delete OK

**Figure 4-49. Adding a Temporary Address**

2. If adding an e-mail address, enter it in the **Email** field (see [Figure 4-50](#)).

**Figure 4-50. Adding an E-mail Address**

- f. Click **Save** to save the address and to update the **Patron Record List**.

If you click **OK**, a message stating, "The patron address record has been altered. Save changes?" displays.

Responding with **Yes** saves the address and returns the operator to the patron record. Otherwise, you are returned to the Patron Record without saving the record.

The **Delete** button effects only current addresses, it has no effect on newly-added information.

6. To add an additional phone number, perform the following steps:
  - a. Click **Phone numbers <new>** in the **Patron Record** list.

**NOTE:**

To link this phone number to the permanent address, click **Phone Numbers <new>** which is listed under that address.

Similarly to link this phone number to the temporary address, click **Phone Numbers <new>** which is listed under the temporary address.

- b. Select the phone number type from the **Phone Type** drop-down.
- c. Enter the phone number in the **Phone** field (see [Figure 4-51](#)).

The screenshot shows the 'Edit Patron Record' window. It has five tabs: Name, Details, Barcode, Address, and Phone. The 'Phone' tab is selected. Inside the Phone tab, there is a 'Phone Type' dropdown menu and a 'Phone' text input field. To the right of the main form is a 'Patron Record' summary pane. It lists the following information: Name: Matthew Phillips; Details: Graduate Student: Active; Barcodes <new>: Permanent; Addresses <new>: Phone Numbers <new>. At the bottom of the window are three buttons: Save, Delete, and OK.

**Figure 4-51. Adding an Additional Phone Number**

- d. Click **Save** to save the phone number and to update the **Patron Record** List.

If you click **OK**, a message stating, "The patron phone record has been altered. Save changes?" displays.

Responding with **Yes** saves the phone number and returns the operator to the patron record. Otherwise, you are returned to the Patron Record without saving the changes.

The **Delete** button effects only current phone numbers, it has no effect on newly-added information.

7. After saving the additions, click **OK** to return to the Patron Record.

Result: The additional information is added.

---

## Deleting Information from the Patron Record

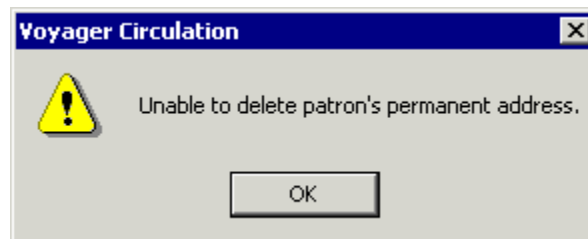
Authorized operators can delete information from existing Patron Records.

### NOTE:

Operators may not delete, last name, patron group, or leave address line 1 blank.



If you select patron information that cannot be deleted, an error message displays (as shown in [Figure 4-52](#)). Clicking **OK** closes the error message and returns to the patron record.



**Figure 4-52. Unable to Delete Error Message**

## Security

Operators that have the **Delete Patron Records** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to delete patron record information (see [Figure 4-17 on page 4-20](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

The procedure for deleting information from a patron record is shown in [Procedure 4-4, Deleting Information from the Patron Record](#).



### Procedure 4-4. Deleting Information from the Patron Record

Use the following steps to delete information from the Patron Record:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record on page 3-2](#).

3. Select **Edit Patron (Ctrl + E)** from the **Patron** menu, or right-click and select the same command from the submenu.

Result: The **Edit Patron Record** dialog box opens (as shown in [Figure 4-53](#)).

**Edit Patron Record**

Name   Details   Barcode   Address   Phone

Last:

First:

Middle:

Title:

Name Type:  ▼

Institution Id:

SSN:

**Patron Record**

**Name**  
0000000010 Sarah Student

**Details**

**Barcodes <new>**  
Staff: Expired  
Undergraduate Student: Expired

**Addresses <new>**  
Permanent

**Phone Numbers <new>**  
Primary: 847-296-2200

Save   Delete   OK

**Figure 4-53. Edit Patron Record Dialog Box**

4. Select the patron information (black text) in the **Patron Record** list that you want to delete. For example delete the mobile phone number (see [Figure 4-54](#)).

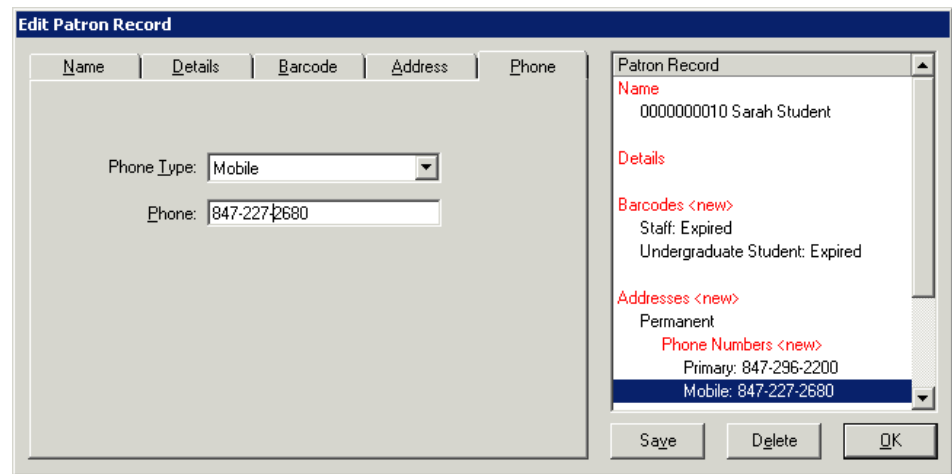


Figure 4-54. Selecting the Mobile Phone Number to Delete



**IMPORTANT:**

*If you select the patron name from the Patron Record List, Voyager attempts to delete the entire patron record.*

5. Click the **Delete** button.

If the information can be deleted, a message displays asking to confirm the deletion (see [Figure 4-55](#)). Click **Yes** to continue with deletion or click **No** to cancel deletion.

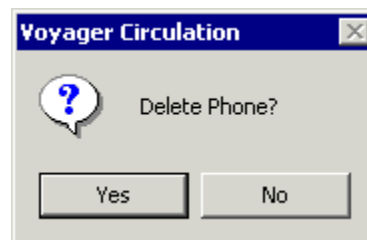
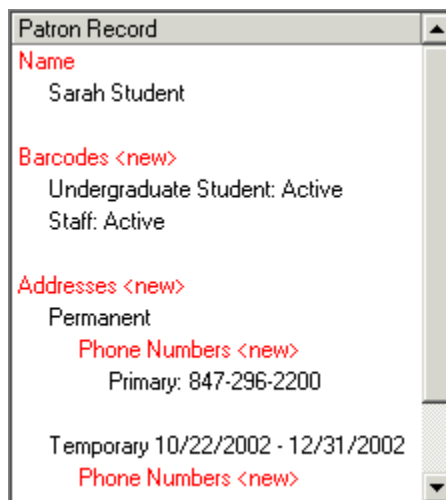


Figure 4-55. Confirmation Message for Deleting the Phone

Result: If selected **Yes**, the Mobile phone number is deleted and the Patron Record list updates accordingly (see [Figure 4-56](#)).

---



The screenshot shows a 'Patron Record' dialog box with the following content:

- Name**: Sarah Student
- Barcodes <new>**: Undergraduate Student: Active, Staff: Active
- Addresses <new>**: Permanent
- Phone Numbers <new>**: Primary: 847-296-2200
- Temporary 10/22/2002 - 12/31/2002
- Phone Numbers <new>**

---

**Figure 4-56. Patron Record List**

- When you have finished deleting patron information, click **OK** to close the **Edit Patron Record** dialog box.

Result: The information is deleted.

---

## Deleting Patron Records

---

Deleting patrons automatically removes them from any routing lists or proxy patron lists to which they may have been assigned, and the lists are re-prioritized. No warning are given when the patron is removed from a list.

Patron records may not be deleted if the following is true:

- The patron has items currently charged.
- The patron has outstanding hold or recall requests.
- The patron has unpaid fines/fees and the **Allow Deletion of Patron with Historical Fines** checkbox is not checked in the System Administration module's **Circulation - Miscellaneous** workspace.
- The patron record is linked to a circulation transaction exception.

- The patron has outstanding media bookings.

The procedure for deleting a patron record is shown in [Procedure 4-5, Deleting a Patron Record](#).



---

**Procedure 4-5. Deleting a Patron Record**

---

Use the following to delete a Patron Record:

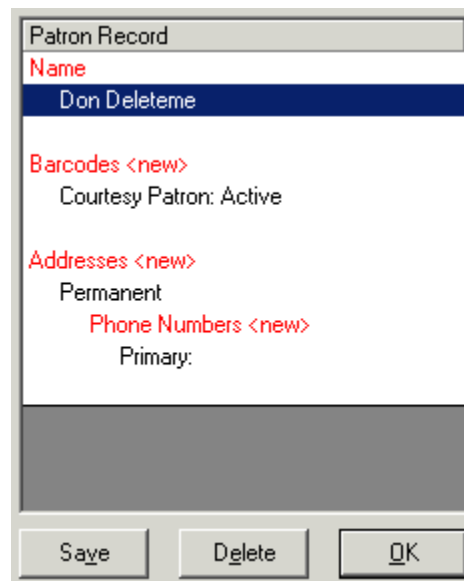
1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record you want to delete. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Edit Patron (Ctrl + E)** from the **Patron** menu or right-click and select the same command from the submenu.

Result: The **Edit Patron Record** dialog box opens.

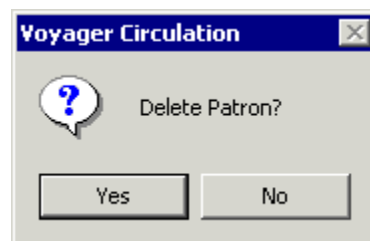
4. Select the patron's name (black text) in the **Patron Record** list (see [Figure 4-57](#)).



**Figure 4-57. Patron Name Selected to Delete Entire Patron Record**

5. Click the **Delete** button.

Result: A message asking the operator to confirm the deletion displays (see [Figure 4-58](#)).



**Figure 4-58. Message Asking for Confirmation of the Patron Record Deletion**

6. Click **Yes** to delete the patron record. Otherwise, click **No** to return to the **Edit Patron Record** dialog box without deleting the record.

Result: If clicked **Yes**, the record is deleted.

---

## **Duplicating Patron Records**

---

The duplicate patron function allows you to copy an open patron's information to a new patron record.

**NOTE:**

This procedure does not allow you to duplicate stub patron records.

The procedure for deleting a patron record is shown in [Procedure 4-6, Duplicating a Patron Record](#).



### **Procedure 4-6. Duplicating a Patron Record**

---

Use the following to delete a Patron Record:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record you want to duplicate. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Duplicate Patron (Ctrl + E)** from the **Patron** menu or right-click and select the same command from the submenu.

Result: The **Add Duplicate Patron Record** dialog box opens.

The screenshot shows a software window titled "Add Duplicate Patron Record". It contains several tabs: "Name", "Details", "Barcode", "Address", and "Phone". The "Name" tab is selected and contains the following fields: "Last" (filled with "Phillips"), "First" (filled with "Matthew"), "Middle" (empty), "Title" (empty), "Name Type" (a dropdown menu showing "Personal"), "Institution Id" (empty), and "SSN" (empty). To the right of these fields is a preview pane titled "Patron Record" which displays the data entered in the "Name" tab: "Name" (Matthew Phillips), "Details" (Graduate Student: Active), "Addresses" (Permanent), and "Phone Numbers". At the bottom right of the dialog are three buttons: "Save", "Delete", and "OK".

**Figure 4-59. Add Duplicate Patron Record Dialog Box**

4. From each tab, update fields as needed.



**IMPORTANT:**

*To avoid duplication during batch loading, make sure that you enter a unique Institution ID or Social Security Number on the Name tab.*

5. Click **Save**.

Result: The Patron record has been duplicated.

---

## **Adding or Changing PINs in the Circulation Module**

A patron's personal identification number (PIN) can be added or edited in the Circulation module.



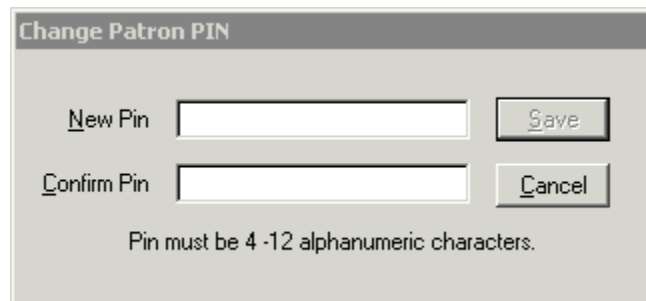
## Security

Depending on your security profile, you may be allowed to add or edit PINs. Operators that have the **Update PINs** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to do this (see [Figure 4-17 on page 4-20](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

## Change Patron PIN Dialog Box

PINs can be added or edited using the **Change Patron PIN** dialog box (see [Figure 4-60](#)).



The image shows a dialog box titled "Change Patron PIN". It contains two input fields: "New Pin" and "Confirm Pin". To the right of the "New Pin" field is a "Save" button, and to the right of the "Confirm Pin" field is a "Cancel" button. Below the input fields, a message states: "Pin must be 4 -12 alphanumeric characters."

**Figure 4-60. Change Patron PIN**

### NOTE:

The `option.usePIN` setting in the `webvoyage.properties` file needs to be set to `Y` in order for the PIN field to display at login. The default setting for this option is `N`. Refer to the *WebVoyage Basic User's Guide* for login information.

[Table 4-18](#) describes the fields in the **Change Patron PIN** dialog box.

**Table 4-18. Change Patron PIN Dialog Box**

Name	Description	Required	Range
New PIN	Personal Identification Number (PIN) for the patron used when logging in to WebVoyage®.	Yes	Alphanumeric 4 to 12 characters Avoid using special characters in the PIN.

**Table 4-18. Change Patron PIN Dialog Box**

Name	Description	Required	Range
Confirm PIN	For security purposes, the confirmation field requires the operator to enter the New PIN number.	Yes	This must be same as the New PIN number.

The procedure for adding or changing a patron PIN is shown in [Procedure 4-5, Deleting a Patron Record](#).



---

**Procedure 4-7. Adding or Changing PINs in the Circulation Module**

---

Use the following steps to add or change a PIN in the Circulation module:

1. After logging in to the Circulation module, access the patron record whose PIN you want to add or edit. Click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record on page 3-2](#).

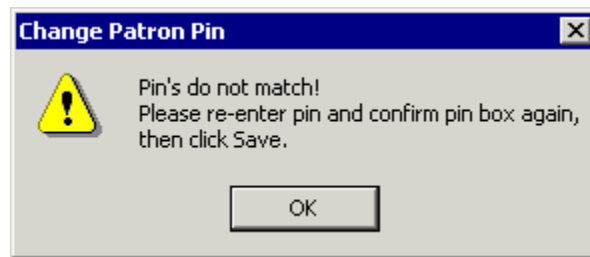
Result: The patron record displays.

3. Select the **Change Patron PIN** option from the **Patron** menu or right-click and select the **Change Patron PIN** option.

Result: The **Change Patron PIN** dialog box opens.

4. Enter the new PIN in the **New PIN** field of the **Change Patron PIN** dialog box.
5. Reenter the PIN in the **Confirm PIN** field.

If two different PINs are entered into the **New PIN** and **Confirm PIN** fields, a PINs do not match... error message displays (see [Figure 4-61](#)).



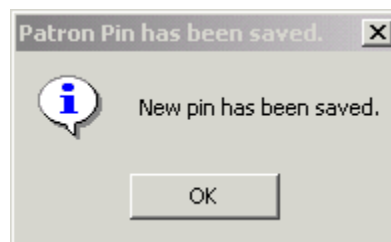
**Figure 4-61. PINs Do Not Match Error Message in the Circulation Module**

6. Click the **Save** button to save the PIN. Otherwise, click the **Cancel** button to cancel the PIN.

The **Save** button is unavailable until you enter at least five characters into both the **New PIN** field and the **Confirm PIN** field.

7. Click **OK**.

Result: The PIN is changed (see [Figure 4-62](#)).



**Figure 4-62. New PIN Saved Message**



**IMPORTANT:**

*There is no display of the PIN anywhere in the Patron Record.*

## Charged Items Index

---

The **Charged Items Index** dialog box provides information on the items a patron has charged.

From the **Charged Items Index** dialog box the operator can complete many tasks.

- Display item information
- Print the list of charged items
- Discharge items
- Change due date
- Renew items

## Security

---

Operators that have the **Charge/Renew** and **Discharge** check boxes selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to renew or discharge items from the **Charged Items Index** dialog box (see [Figure 4-17 on page 4-20](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

## Charged Items Index Dialog Box

---

The **Charged Items Index** dialog box lists all items charged out to a patron. The index includes information such as the title, item location, item barcode, due date and status of each item (see [Figure 4-63](#)).

### NOTE:

The **Charged Items Index** dialog box does not display the Unicode character set. MARC data is converted to the Latin-1 character set.

Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Childhood leukemia [computer file] : a guide for families, friends & caregivers / Nancy Keene.	RJ416.L4 K44 1999eb	Main	BOOK		7/26/2012 04:00 AM	Charged 6/25/2012
Progress in the treatment of leukemia.	616.155 P536p	Main	BOOK	52660	7/26/2012 04:00 AM	Charged 6/25/2012
Ring of endless light / Madeleine L'Engle.	PZ7.L5385 Ri 1980	Juvenile Education	BOOK	95706	7/26/2012 04:00 AM	Charged 6/25/2012

Buttons: Item Info..., Print, Select All, Discharge, Modify Due Date..., Renew, Close

**Figure 4-63. Charged Items Index**

**NOTE:**

To facilitate easier identification and access to relevant information, you can sort all display columns. A click of the column header (for example, Title) displays the information in ascending or descending sort order, sorted by the header selected. A second click of the same header reverses the sort.

[Table 4-19](#) describes the fields on the **Charged Items Index** dialog box.

**Table 4-19. Charged Items Index**

Field	Description
Name	Name of the patron
Total	Total number of items in the list.
Title	Title of the item the patron has charged.
Call Number	Call number of the item charged.
Item Location	Shelving location of the item charged.
Item Type	Item's item type.  <b>NOTE:</b> If the item has a temporary item type, the temporary item type will display in preference to the permanent item type, with a <T> suffix.
Item Barcode	Item's barcode.

**Table 4-19. Charged Items Index**

Field	Description
Due Date	Date the item is due.
Status	Status of the item.
Item Info... button	Displays the item record in view only mode.  In addition to title, author and barcode information, the item information includes location, item type, enumeration, chronology, and other details.  See <a href="#">Item Records</a> on <a href="#">page 5-1</a> .
Print button	Prints a list of all the items in the <b>Charged Items Index</b> dialog box.  Users can customize the format in which the list prints, changing heading information, font sizes, and other details. See <a href="#">Patron Charged Items Stanza</a> on <a href="#">page A-25</a> .
Select All button	Selects all of the items in the list.
Discharge button	Discharges the item(s) in the list that are selected.
Modify Due Date button	Modifies the due date for the items that are selected in the list.
Renew button	Renews the items that are selected in the list.
Close button	Closes the <b>Charged Items Index</b> dialog box.  <b>NOTE:</b> When this dialog box is accessed from the <b>Charge</b> workspace, the timer is inactivated. See <a href="#">The Time-out Timer</a> on <a href="#">page 1-7</a> .

The procedure for accessing the **Charged Items Index** dialog box is shown in [Procedure 4-8, Accessing the Charged Items Index Dialog Box](#).



---

**Procedure 4-8. Accessing the Charged Items Index Dialog Box**

---

Use the following to access the **Charged Items Index** dialog box:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Charged Items...** from the **Patron** menu or click the **Charged Items** button in the patron record.

Result: The **Charged Item Index** dialog box opens (see [Figure 4-64](#)).

The dialog box titled "Charged Items Index" displays a table of charged items for patron 0000000000 Diane Zientara. The table has columns for Title, Call Number, Item Location, Item Type, Item Barcode, Due Date, and Status. There are three items listed, all with a due date of 7/26/2012 04:00 AM and a status of "Charged 6/25/2012".

Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Childhood leukemia [computer file] : a guide for families, friends & caregivers / Nancy Keene.	RJ416.L4 K44 1999eb	Main	BOOK		7/26/2012 04:00 AM	Charged 6/25/2012
Progress in the treatment of leukemia.	616.155 P536p	Main	BOOK	52660	7/26/2012 04:00 AM	Charged 6/25/2012
Ring of endless light / Madeleine L'Engle.	PZ7.L5385 Ri 1980	Juvenile Education	BOOK	95706	7/26/2012 04:00 AM	Charged 6/25/2012

At the bottom of the dialog box are buttons for Item Info..., Print, Select All, Discharge, Modify Due Date..., Renew, and Close. A "Total: 3" label is in the top right corner.

**Figure 4-64. Charged Items Index Dialog Box**

**NOTE:**

You can access the **Charged Items Index** dialog box from the **Charge** workspace as well. The **Charged Items** button displays after entering a patron's barcode. If the patron does not have any charged items, a zero displays beneath the button.

The procedure for displaying item information from the **Charged Items Index** dialog box is shown in [Procedure 4-9, Displaying Item Information from the Charged Items Index Dialog Box](#).



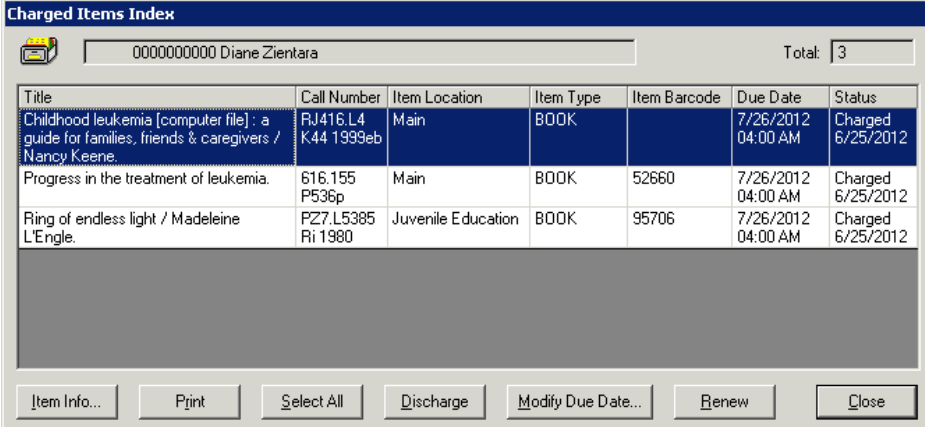
**Procedure 4-9. Displaying Item Information from the Charged Items Index Dialog Box**

Use the following to display item information.

1. Access the **Charged Items Index** dialog box from the Patron Record ([Charged Items Index](#) on [page 4-74](#)) or from the **Charge** workspace ([The Charge Workspace](#) on [page 6-4](#)).

Result: The **Charged Item Index** dialog box opens.

2. Select the title whose item information you want to view (see [Figure 4-65](#)).



**Charged Items Index**

0000000000 Diane Zientara Total: 3

Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Childhood leukemia [computer file] : a guide for families, friends & caregivers / Nancy Keene.	RJ416.L4 K44 1999eb	Main	BOOK		7/26/2012 04:00 AM	Charged 6/25/2012
Progress in the treatment of leukemia.	616.155 P536p	Main	BOOK	52660	7/26/2012 04:00 AM	Charged 6/25/2012
Ring of endless light / Madeleine L'Engle.	PZ7.L5385 Ri 1980	Juvenile Education	BOOK	95706	7/26/2012 04:00 AM	Charged 6/25/2012

Item Info... Print Select All Discharge Modify Due Date... Renew Close

**Figure 4-65. Item Selected to View Item Record Information**

3. Click the **Item Info...** button.

Result: The Item Record is visible in view-only display mode (see [Figure 4-66](#)).



Item 68635 for holding 62518

Title: Childhood leukemia [computer file] : a guide for families, friends & caregivers / Nancy Keene.

Location: Main

Call #: RJ416.L4 K44 1999eb

Barcode:

Temp. Loc.:

Perm. Loc.: Main

Temp. Type:

Item Type: Book

Media Type:

Enum:

Chron:

Year:

Caption:

Free text:

Spine:

Copy: 1

Pieces: 1

Price: 0.00

Self Check

☐ Magnetic Media

☒ Sensitize

Close

Figure 4-66. Item Record in View-only Display Mode

- Click **Close** to return to the **Charged Items Index** dialog box.

The procedure for printing charged items from the **Charged Items Index** dialog box is shown in [Procedure 4-10, Printing Charged Items from the Charged Items Index Dialog Box](#).



**Procedure 4-10. Printing Charged Items from the Charged Items Index Dialog Box**

Use the following to print charged items:

- Access the **Charged Items Index** dialog box from the Patron Record ([Charged Items Index](#) on [page 4-74](#)), or from the **Charge** workspace ([The Charge Workspace](#) on [page 6-4](#)).

Result: The **Charged Item Index** dialog box opens.

- Click the **Print** button.

Result: All of the items in the **Charged Items Index** dialog box print.

The procedure for discharging items from the **Charged Items Index** dialog box is shown in [Procedure 4-11](#), [Discharging Items from the Charged Items Index Dialog Box](#).



#### Procedure 4-11. Discharging Items from the Charged Items Index Dialog Box

Use the following to discharge items from the **Charged Items Index** dialog box.

- Access the **Charged Items Index** dialog box from the Patron Record ([Charged Items Index](#) on [page 4-74](#)) or from the **Charge** workspace ([The Charge Workspace](#) on [page 6-4](#)).

Result: The **Charged Item Index** dialog box opens.

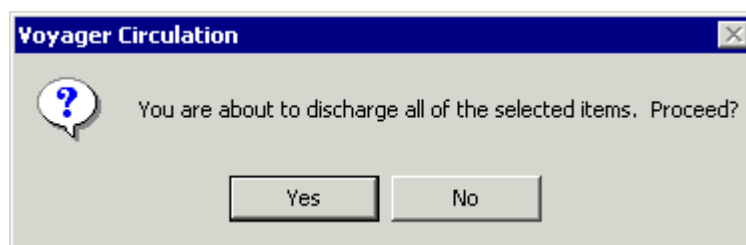
- Select the title(s) to discharge (see [Figure 4-67](#)).

Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Childhood leukemia [computer file] : a guide for families, friends & caregivers / Nancy Keene.	RJ416.L4 K44 1999eb	Main	BOOK		7/26/2012 04:00 AM	Charged 6/25/2012
Progress in the treatment of leukemia.	616.155 P536p	Main	BOOK	52660	7/26/2012 04:00 AM	Charged 6/25/2012
Ring of endless light / Madeleine L'Engle.	PZ7.L5385 Ri 1980	Juvenile Education	BOOK	95706	7/26/2012 04:00 AM	Charged 6/25/2012

**Figure 4-67. Items Selected to Discharge from the Charged Items Index Dialog Box**

- Click the **Discharge** button.

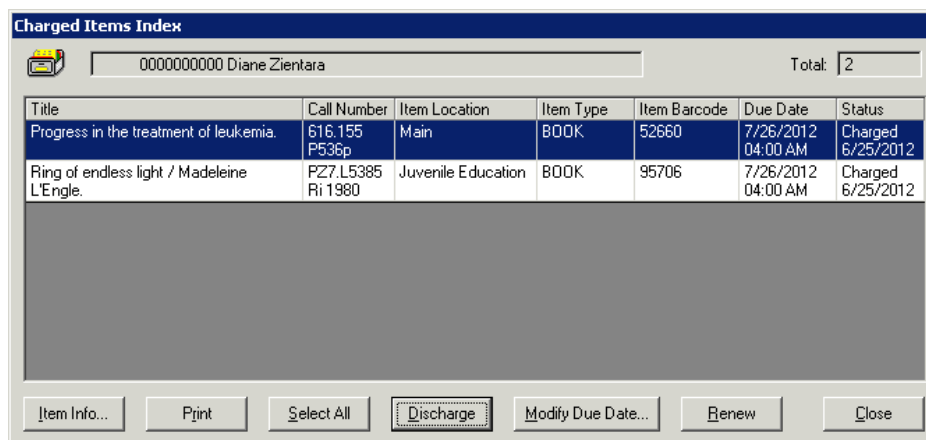
Result: A confirmation message displays (see [Figure 4-68](#)).



**Figure 4-68. Confirmation of the Discharge**

4. Select **Yes** to discharge the selected items. Otherwise, click **No** to return to the **Charged Items Index** dialog box.

Result: If you clicked **Yes**, the items are discharged and removed from the **Charged Items Index** dialog box (see [Figure 4-69](#)). Discharge slips print if wanted.



**Figure 4-69. Charged Items Index List after Discharging Items**

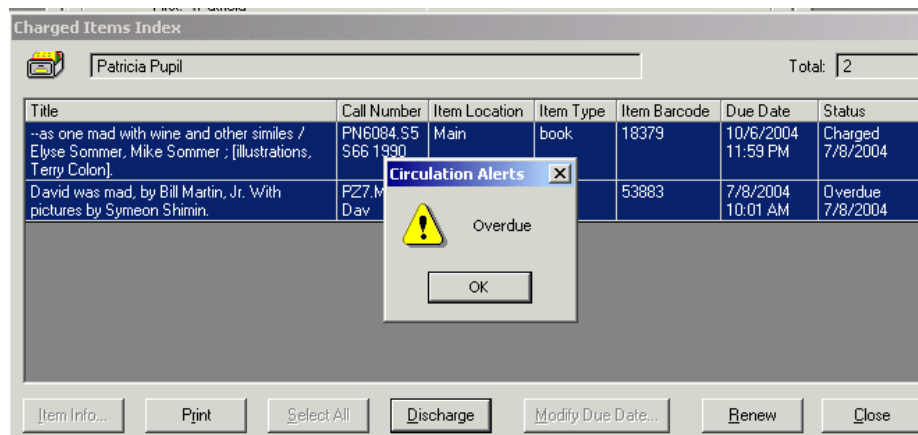
**NOTE:**

If alerts at discharged are configured in the System Administration module and if a condition exists such that an alert is needed, a message displays even when discharging from the **Charged Items Index** dialog box (see [Figure 4-70](#)). If a **Circulation Alerts** dialog box opens, operators must click **OK** to continue the discharge process.

If discharging multiple items from the **Charged Items Index** dialog box, after an alert is raised, the remaining items are not processed automatically and must be discharged manually by the operator.

For information about circulation alerts, see *Circulation Alerts at Discharge and Charge* in the *Voyager System Administration User's Guide*.

---



---

**Figure 4-70. Alert Displaying when Discharging Items from the Charged Items Index Dialog Box**

---

The procedure for renewing items from the **Charged Items Index** dialog box is shown in [Procedure 4-12, Modifying a Due Date from the Charged Items Index Dialog Box](#).



---

#### **Procedure 4-12. Modifying a Due Date from the Charged Items Index Dialog Box**

---

Operators that have the **Change Due Date** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to modify due dates (see [Figure 6-2 on page 6-3](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

Use the following to modify an item's due date from the **Charged Items Index** dialog box.

1. Access the **Charged Items Index** dialog box from the Patron Record ([Charged Items Index](#) on [page 4-74](#)) or from the **Charge** workspace ([The Charge Workspace](#) on [page 6-4](#)).

Result: The **Charged Item Index** dialog box opens.

2. Select the title to modify (see [Figure 4-67](#)).

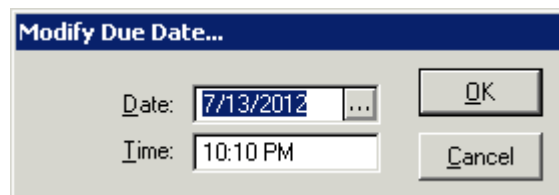
Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Childhood leukemia [computer file] : a guide for families, friends & caregivers / Nancy Keene.	RJ416.L4 K44 1999eb	Main	BOOK		7/26/2012 04:00 AM	Charged 6/25/2012
Progress in the treatment of leukemia.	616.155 P536p	Main	BOOK	52660	7/26/2012 04:00 AM	Charged 6/25/2012
Ring of endless light / Madeleine L'Engle.	PZ7.L5385 Ri 1980	Juvenile Education	BOOK	95706	7/26/2012 04:00 AM	Charged 6/25/2012

**Figure 4-71. Item Selected to Modify from the Charged Items Index Dialog Box**

3. Click the **Modify Due Date** button.

Result: A confirmation message displays (see [Figure 4-68](#)).

4. Enter the new due date in the **Date** field. You can enter the date manually or click the ellipses button to display a **Calendar** dialog box to select a date.

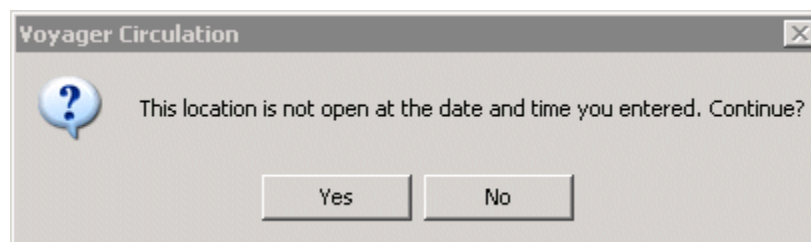


---

**Figure 4-72. Modify Due Date Dialog Box**

5. Enter the time when the items are due in the **Time** field.
6. Click **OK** to save your changes and close the **Modify Due Date** dialog box or click **Cancel** to close without saving your changes.

If the new due date and time are outside of the normal calendar for the circulation location, the system will display the following message:



---

**Figure 4-73. Due Date Message Dialog Box**

Click **Yes** to save your changes to the due date. Otherwise, click **No** to cancel your changes to the due date.

---

The procedure for renewing items from the **Charged Items Index** dialog box is shown in [Procedure 4-13, Renewing Items from the Charged Items Index Dialog Box](#).



### Procedure 4-13. Renewing Items from the Charged Items Index Dialog Box

Use the following to renew items from the **Charged Items Index** dialog box:

1. Access the **Charged Items Index** dialog box from the Patron Record ([Charged Items Index](#) on [page 4-74](#)) or from the **Charge** workspace ([The Charge Workspace](#) on [page 6-4](#)).

Result: The **Charged Item Index** dialog box opens.

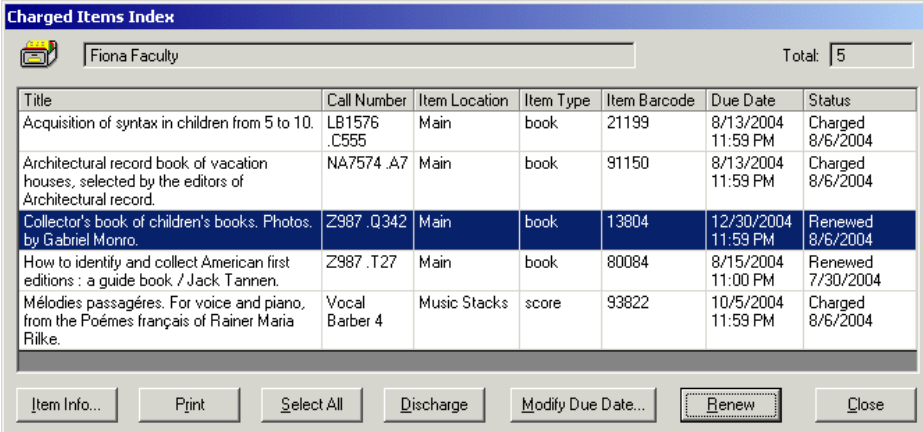
2. Select the title(s) to renew (see [Figure 4-74](#)).

Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Acquisition of syntax in children from 5 to 10.	LB1576 .C555	Main	book	21199	8/13/2004 11:59 PM	Charged 8/6/2004
Architectural record book of vacation houses, selected by the editors of Architectural record.	NA7574 .A7	Main	book	91150	8/13/2004 11:59 PM	Charged 8/6/2004
Collector's book of children's books. Photos. by Gabriel Monro.	Z987 .Q342	Main	book	13804	8/13/2004 11:59 PM	Charged 7/30/2004
How to identify and collect American first editions : a guide book / Jack Tannen.	Z987 .T27	Main	book	80084	8/15/2004 11:00 PM	Renewed 7/30/2004
Mélodies passagères. For voice and piano, from the Poèmes français of Rainer Maria Rilke.	Vocal Barber 4	Music Stacks	score	93822	10/5/2004 11:59 PM	Charged 8/6/2004

**Figure 4-74. Items Selected to Renew from the Charged Items Index Dialog Box**

3. Click the **Renew** button.

Result: The items are renewed and the status is updated in the **Charged Items Index** dialog box (see [Figure 4-75](#)). The status column now displays **Renewed** and gives the new due date. Also, discharge slips print if wanted.



Fiona Faculty						Total: 5
Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Acquisition of syntax in children from 5 to 10.	LB1576 .C555	Main	book	21199	8/13/2004 11:59 PM	Charged 8/6/2004
Architectural record book of vacation houses, selected by the editors of Architectural record.	NA7574 .A7	Main	book	91150	8/13/2004 11:59 PM	Charged 8/6/2004
Collector's book of children's books. Photos. by Gabriel Monro.	Z987 .Q342	Main	book	13804	12/30/2004 11:59 PM	Renewed 8/6/2004
How to identify and collect American first editions : a guide book / Jack Tannen.	Z987 .T27	Main	book	80084	8/15/2004 11:00 PM	Renewed 7/30/2004
Mémoires passagères. For voice and piano, from the Poèmes français of Rainer Maria Rilke.	Vocal Barber 4	Music Stacks	score	93822	10/5/2004 11:59 PM	Charged 8/6/2004

Item Info... Print Select All Discharge Modify Due Date... Renew Close

---

**Figure 4-75. Charged Items Index after Renewing the Item**

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## Patron Fines/Fees

---

The **Patron Fines/Fees** dialog box provides information on a patron's current and historical fines and fees (see [Figure 4-76](#)). Users can limit viewing fines and fees to a single location from which they were assessed or to all locations.

### NOTE:

The **Patron Fines/Fee** dialog box does not display the Unicode character set. The MARC data is converted to the Latin-1 character set.



**Patron Fines/Fees**

0000000000 Jorge Fernandez

Fines, Fees and Demerits for Location: All Locations

Outstanding Fines/Fees				Fines/Fees History			
Date	Title	Barcode	Fee/Posting Type	Fee	Posting	Balance	Location
9/3/2013 05:56 PM	Harry Potter and the prisoner of Azkaban / by J.K. Rowling	6664581682	Overdue	\$7.00		\$7.00	Circulation Desk
4/21/2010 02:36 PM	Martin Luther King, Jr. [videorecording]	20557	Lost Item Replacement	\$100.00		\$100.00	
4/21/2010 02:36 PM	Martin Luther King, Jr. [videorecording]	20557	Overdue	\$10.00		\$10.00	

Description:

**Total Selected:** \$7.00  
**Total fines displayed:** \$117.00  
**Total Due:** \$117.00

Charge Date:   
 Due Date:   
 Discharge Date:   
 Notice Sent:

Create  
 Operator: demo  
 Location: Circulation Desk

Modify  
 Date:   
 Operator:   
 Location:

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

**Figure 4-76. Patron Fine/Fees Dialog Box**

**NOTE:**

If your site assesses demerit points, they display here as well. See additional information in the appendix, [Demerits](#) on [page D-1](#).

Additionally, from the **Patron Fines/Fees** dialog box the operator can complete many tasks:

- adding a fine or fee
- modifying a fine or fee
- posting against a fine or fee
- printing fine and fee information

The **Patron Fines/Fees** dialog box contains the following tabs:

- **Outstanding Fines/Fees**
- **Fines/Fees History**

These tabs contain the same fields.

[Table 4-20](#) describes the fields in the **Patron Fines/Fees** dialog box.

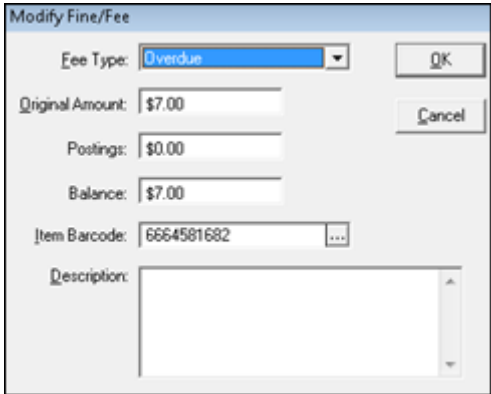
**Table 4-20. Patron Fines/Fees Dialog Box**

Field	Description
Name	The unlabeled field shown at the top of the dialog box is the name of the patron.
Fines, Fees and Demerits for Location	<p>This drop-down list displays all of the circulation locations within the operator's cluster. The locations are sorted alphabetically after an <code>All Locations</code> option.</p> <p>If the <code>Use Active Circulation Location as the Default Fines/Fees Filter</code> check box (see <a href="#">Table 13-3</a> on <a href="#">page 13-6</a>) is selected, the active circulation is the selected entry. Otherwise, <code>All Locations</code> is selected.</p> <p><b>NOTE:</b> Circulation desks that are not part of the operators security profile are included in this list.</p> <p>See <a href="#">Fines, Fees and Demerits for Location</a> on <a href="#">page 4-91</a> for more information.</p>
Date column	The date the fine/fee was applied.
Title column	The title of the item to which the fine/fee applies.
Barcode column	Barcode of the item to which the fine/fee applies.
Fee/Posting Type	Reason for the fine/fee, including accrued fines.
Fee	Amount of the fine/fee.
Posting	Fines and fees that have been paid are listed.
Balance	Amount of the fine/fee that remains due.
Location	Location where the fine or fee was assessed.
Total Selected	Total amount for the fines/fees of the selected items in the list.
Total fines displayed	Total amount of displayed fines/fees for the patron. The patron may have additional fines/fees that do not display.
Total Due	<p>Total amount of all fines/fees for the patron.</p> <p><b>NOTE:</b> This includes all fines/fees, that is those displayed and those not displayed.</p>
Description box	For any selected item, additional information may be seen in the description box.

**Table 4-20. Patron Fines/Fees Dialog Box**

Field	Description
Information box	<p>For any selected item, the following additional information displays:</p> <ul style="list-style-type: none"> <li>• Charge Date</li> <li>• Due Date</li> <li>• Discharge Date</li> </ul> <p>This is the date that the item is returned/discharged.</p> <p>This date may be different from the fine/fee creation date when the system backdates the discharge date for calculating a fine. This happens when you discharge the item after the library's closed time, and the system cannot start charging fines after the library is closed.</p> <ul style="list-style-type: none"> <li>• Notice Sent (date)</li> </ul> <p>This is the date that the bill (notice) for fines/fees was sent.</p> <ul style="list-style-type: none"> <li>• Operator</li> <li>• Location</li> </ul>
Create: Operator Location	This section displays the name of the operator that created the fine/fee and from which location the fine/fee was created.
Modify: Date Operator Location	This section displays the name of the operator that modified the fine/fee, from which location the fine/fee was modified, and the date the modification was made.
Item Info... button	<p>The item record displays in view only mode.</p> <p>In addition to the title, author and barcode information, the item information includes: location, item type, enumeration, chronology, and other details.</p>
Print button	<p>Prints all the fines listed on the Patron Fines/Fees dialog box print.</p> <p>Users can customize the format in which the list prints, changing heading information, font sizes, and other details. See <a href="#">Fine/Fees Statement Stanza</a> on <a href="#">page A-21</a>.</p>
Add... button	<p>Opens the Add Fine/Fee dialog box. This is not available if the active circulation desk is other than the one selected in the Fines, Fees and Demerits for Location field.</p> <p>Operators can add a new fine or fee by using this option. See <a href="#">Add Fine/Fee Dialog Box</a> on <a href="#">page 4-92</a>.</p>

**Table 4-20. Patron Fines/Fees Dialog Box**

Field	Description
Modify ... button	<p>Opens the Modify Fine/Fee dialog box.</p> <hr/>  <hr/> <p><b>Figure 4-77. Modify Fine/Fee dialog box</b></p> <p>The Modify button is active when:</p> <ul style="list-style-type: none"> <li>• Only one fine/fee or demerit is selected (even though it is possible to select multiple fines or demerits with Ctrl or Shift and post against multiple selections)</li> <li>• A fine is outstanding (on the Outstanding Fines/Fes tab, and the balance is not 0.00)</li> <li>• The operator is allowed to modify fines/fees according to the following permissions :             <ul style="list-style-type: none"> <li>- The Modify Outstanding Fines/Fees option has been selected on the Profile 1 tab in the System Administration Security -Circulation Profiles section</li> <li>- The fine/fee's location has been selected on the Locations tab in the System Administration Security - Circulation Profiles section in the (allowed) Selection Locations list</li> </ul> </li> </ul>

**Table 4-20. Patron Fines/Fees Dialog Box**

Field	Description
Post... button	Opens the Post Against Fine/Fee dialog box. This is not available if the active circulation desk is other than the one selected in the Fines, Fees and Demerits for Location field.  Operators can manually post a payment. See <a href="#">Posting Against Fines/Fees</a> on <a href="#">page 4-99</a> .
Close button	Closes the Patron Fines/Fees dialog box.  <b>NOTE:</b> When this dialog box is accessed from the Charge workspace, the timer is inactivated. See <a href="#">The Time-out Timer</a> on <a href="#">page 1-7</a> .

**NOTE:**

By running circulation batch job 2, overdue fines are applied to patrons who discharge items that are overdue. By running circulation batch job 30, accrued fines are applied to patrons who have not returned an item by the due date. See [Circjob 30 Accrued Fines and Demerits](#) on [page D-25](#) and the *Voyager Reporter User's Guide* for more information about these batch jobs.

**Fines, Fees and Demerits for Location**

When an operator selects a specific circulation location from this drop-down list, the following occurs:

- Only those penalties assessed, both accrued and real, at that desk display on either tab
- Payments are posted against the visible fines, fees, or demerits
- Adding new fines or fees is allowed if 'All Locations' is selected, or if the active circulation desk matches the specific desk that is selected
- Operators may either choose 'All Locations' or another single location

The procedure for accessing the **Patron Fines/Fees** dialog box is shown in [Procedure 4-14, Accessing the Patron Fines/Fees Dialog Box](#).

**Procedure 4-14. Accessing the Patron Fines/Fees Dialog Box**

Use the following to access the **Patron Fines/Fees** dialog box:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select the **Fine/Fee** button on the Patron Record or select **Fine/Fee Info** from the **Patron** menu.

Result: The **Patron Fines/Fees** dialog box opens.

**NOTE:**

You can access the **Patron Fines/Fees** dialog box from the **Charge** workspace as well. The **Fines/Fees** button displays after entering a patron's barcode. If the patron does not have any charged items, a zero displays beneath the button. A dollar amount beneath the button indicates the total amount of current fines/fees for the patron.

---

## **Adding Fines/Fees**

---

Fines and Fees are charges that are associated with patrons. These charges can be manually assessed from the **Patron Record** workspace or the **Charge** workspace.

## **Security**

Depending on your security profile, you may be allowed to add fines/fees to patron records. Operators that have the **Add/Update Fines/Fees** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to do this (see [Figure 4-17 on page 4-20](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

## **Add Fine/Fee Dialog Box**

Fines and fees are added using the **Add Fine/Fee** dialog box (see [Figure 4-78](#)).

**Figure 4-78. Add Fine/Fee Dialog Box**

[Table 4-21](#) describes the **Add Fine/Fee** dialog box.

**Table 4-21. Add Fine/Fee Dialog Box**

Name	Description	Required	Range
Fee Type	Type of fee being applied to this patron. Some fee types are system defined, others are user-defined. They are created in the System Administration module. See <i>Fine/Fees</i> in the <i>Voyager System Administration User's Guide</i> .	Yes	Drop-down of Fee Type
Amount	Amount of money charged to the patron (or number of demerit points assessed).	Yes	0 to 999,999,999.99
Item Barcode	Barcode of the item to which this fine/fee is assessed.  Click the ellipses button to search for the item (see <a href="#">Searching for an Item</a> on <a href="#">page 3-11</a> ).  When you select an item from the results list, the barcode is automatically entered in the field.	No	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  25 characters

**Table 4-21. Add Fine/Fee Dialog Box**

Name	Description	Required	Range
Description	Information about the fine/fee that will display in the Description field on the tab should be entered in this free text field.  <b>NOTE:</b> Once saved there is no way to remove this note.	No	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  999 characters

The procedure for adding a fine or fee from the **Patron Fines/Fees** dialog box is shown in [Procedure 4-15, Adding a Fine/Fee](#).



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**Procedure 4-15. Adding a Fine/Fee**

---

Use the following to add a fine or fee to the Patron Record:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select the **Fine/Fee** button on the Patron Record or select **Fine/Fee Info** from the **Patron** menu.

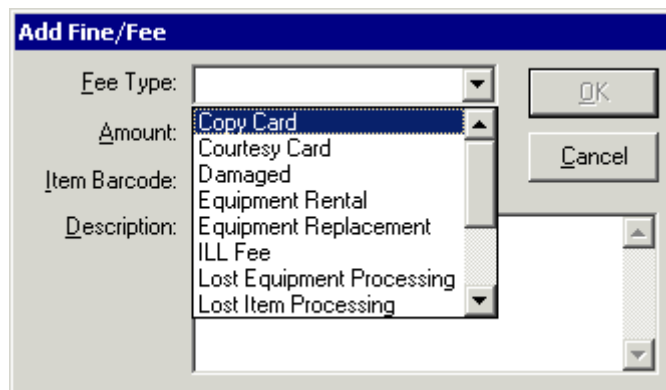
Result: The **Patron Fines/Fees** dialog box opens.

4. Click the **Add** button.

Result: The **Add Fine/Fee** dialog box opens.

5. Select the fee type from the **Fee Type** field list (see [Figure 4-79](#)).

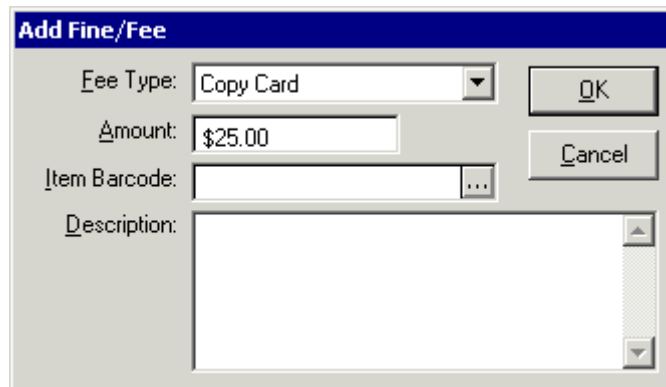




**Figure 4-79. Drop-down Menu of Fine/Fee Types**

6. Enter the fine/fee charge in the **Amount** field.
7. Enter the item's barcode in the **Item Barcode** field or click the ellipsis button in the barcode field to search for an item if wanted.
8. Type in a description in the free text **Description** field if you want.

[Figure 4-80](#) shows an example with the wanted fields completed.



**Figure 4-80. Example of a Completed Add Fines/Fees Dialog Box**

9. Click **OK** to save and exit the **Add Fine/Fee** dialog box. Otherwise, click **Cancel** to exit without saving.

Result: The fine/fee is assessed to the Patron Record and displays on the **Outstanding Fines/Fees** tab.

---

### Adding a Fine/Fee from the Charge Workspace

Fines and fees can also be added from the **Charge** workspace.

The procedure for adding a fine or fee from the **Charge** workspace is shown in [Procedure 4-16, Adding Fine/Fees from the Charge Workspace](#).



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#### Procedure 4-16. Adding Fine/Fees from the Charge Workspace

---

Use the following to add a fine or fee from the **Charge** workspace:

1. After logging in to the Circulation module, click the **Charge** button from the Circulation toolbar or select **Charge/Renew** from the **Functions** menu.

Result: The **Charge** workspace opens.

2. Search for and display a patron record. See [Searching for a Patron from the Charge Workspace](#) on [page 3-8](#).

Result: The patron record information populates the **Charge** workspace (see [Figure 4-81](#)).

**Figure 4-81. Patron Information in the Charge 0**

3. Click the **Fine/Fee** button on the Patron Record or select **Fine/Fee Info** from the **Charge/Renew** menu.

Result: The **Patron Fines/Fees** dialog box opens. Add any wanted fines/fees. See [Procedure 4-15, Adding a Fine/Fee](#), on page [4-94](#).

## Modifying Fines/Fees

The procedure for modifying a fine or fee from the **Patron Fines/Fees** dialog box is shown in [Procedure 4-17, Modifying a Fine/Fee](#).



### Procedure 4-17. Modifying a Fine/Fee

Use the following to modify a fine or fee to the Patron Record:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).

3. Select the **Fine/Fee** button on the Patron Record or select **Fine/Fee Info** from the **Patron** menu.

Result: The **Patron Fines/Fees** dialog box opens.

4. Click the **Modify** button.

Result: The **Modify Fine/Fee** dialog box opens.

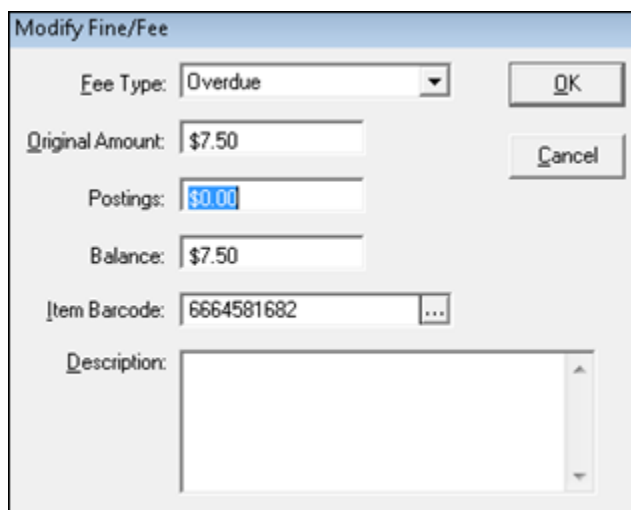
5. Select the fee type from the **Fee Type** drop-down list.
6. Enter the change/modification in the **Original Amount** field.

**NOTE:**

It is not possible to change the original amount to be less than any current postings. For example, when the original amount is \$10 and the postings is \$7, you cannot set the original amount to \$5 because the find would have a positive balance of \$2. A positive balance is not allowed.

7. Optionally, modify the Postings field.
8. Enter the item's barcode in the **Item Barcode** field or click the ellipsis button in the barcode field to search for an item if wanted.

---



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**Figure 4-82. Modify Fine/Fee example**

9. Optionally, enter a description in the free text **Description** field.

10. Click **OK** to save and exit the **Modify Fine/Fee** dialog box. Otherwise, click **Cancel** to exit without saving.

Result: The modified fine/fee is assessed to the patron record and displays on the **Outstanding Fines/Fees** tab.

---

### **Posting Against Fines/Fees**

---

From the **Patron Fines/Fees** dialog box the operator can access the **Post Against Fine/Fee** dialog box.

### **Security**

Depending on your security profile, the operator may be allowed to post against fines/fees. Operators that have the **Accept Payments** and **Forgive/Error/Refund Fines/Fees** check boxes selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to do this (see [Figure 4-17 on page 4-20](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

### **Post Against Fine/Fee**

The **Post Against Fine/Fee** dialog box allows the operator to post payment to one or more fines or fees (see [Figure 4-83](#)).

**Figure 4-83. Post Against Fine/Fee Dialog Box**

[Table 4-22](#) describes the **Post Against Fine/Fee** dialog box.

**Table 4-22. Post Against Fine/Fee Dialog Box**

Name	Description	Required	Range
Post Against	<p>When Selected is clicked, the payment is posted against a specific fine or fee selected on the Outstanding Fines/Fees tab by the operator.</p> <p>When Displayed is clicked, the payment is posted against those penalties belonging to the selected location, beginning with the oldest.</p> <p>When Patron Total is clicked, the payment is posted against the patron's total amount, beginning with the oldest penalty the patron has.</p> <p>Use Session Preferences to set the default for these options. See the <a href="#">Alerts, Printing, and Fines/Fees/Demerits</a> section starting on page <a href="#">13-2</a>.</p>	Must select one radio button	<p>Radio button</p> <ul style="list-style-type: none"> <li>Selected</li> <li>Displayed</li> <li>Patron Total</li> </ul>

Table 4-22. Post Against Fine/Fee Dialog Box

Name	Description	Required	Range
Posting Type	<p>Type of payment being applied to this payment.</p> <p>Some fee types are system defined and others are user-defined. They are created in the System Administration module. See <i>Fine/Fees</i> in the <i>Voyager System Administration User's Guide</i>. The drop-down list displays both system-defined and user-defined posting types.</p> <p><b>NOTE:</b> The operator's security profile determines what may be processed. In Voyager System Administration, Accept Payments and Forgive/Error/Refund Fines/Fees are defined on the Profiles tab of Security – Circulation Profiles (see <a href="#">Add/Update Patron Records on the Profiles Tab</a> on <a href="#">page 4-20</a>). Refer to the <i>Voyager System Administration User's Guide</i> for more information.</p>	Yes	Drop-down list of fee types
Amount	<p>Amount of payment.</p> <p>When the <b>Selected</b> radio button is selected, the value in the Total Selected field on the Patron Fine/Fees dialog box displays in this field.</p> <p>When the <b>Displayed</b> radio button is selected, the value in the Total fines displayed field on the Patron Fine/Fees dialog box displays in this field.</p> <p>When the <b>Patron Total</b> radio button is selected, the value in the Total Due field on the Patron Fine/Fees dialog box displays in this field.</p>	Yes	1-999,999,999.99
Method	<p>Method of payment (for example, cash).</p> <p>Some payment methods are system defined, others are user-defined. They are created in the System Administration module. See <i>Fine/Fees</i> in the <i>Voyager System Administration User's Guide</i>.</p>	Yes	Drop-down list of payment types

**Table 4-22. Post Against Fine/Fee Dialog Box**

Name	Description	Required	Range
Description	Information about the payment that will display in the Description field on the tab.	No	Free-text field

The procedure for posting a fine or fee to the Patron Record is shown in [Procedure 4-18, Posting Against a Fine/Fee](#).



---

**Procedure 4-18. Posting Against a Fine/Fee**

---

Use the following to post a fine or fee to the Patron Record:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record you want to post a payment to. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select the **Fine/Fee** button on the Patron Record or select **Fine/Fee Info** from the **Patron** menu.

Result: The **Patron Fines/Fees** dialog box opens.

4. If you want to post against a specific fine or fee, select the item(s) in the **Patron Fines/Fees** dialog box. If you want the posting to be generally applied to the fine/fee total, do not select a specific line item.
5. Click the **Post** button.

Result: The **Post Against Fine/Fee** dialog box opens.

6. Select the wanted **Post Against** radio button.
7. Select the posting type from the drop-down list in the **Posting Type** field.
8. Enter the payment in dollars and cents in the **Amount** field.
9. Select a method of payment (for example, cash) from the drop-down list in the **Method** field.



10. Add any additional information you want recorded about this payment in the **Description** field.
11. Click **OK** to save and exit the **Post Against Fine/Fee** dialog box. Otherwise click **Cancel** to exit without saving.

Result: If you clicked **OK**, a fine or fee is posted against this patron record.

Operators can also post payments from the **Charge** or **Discharge** workspaces by accessing the **Post Against Fines/Fees** dialog box.

The procedure for posting a fine or fee to the Patron Record from the **Charge** or **Discharge** workspace is shown in [Procedure 4-19, Posting Against Fines or Fees from the Charge Workspace](#) and [Procedure 4-20, Posting Against Fines or Fees from the Discharge Workspace](#).



#### **Procedure 4-19. Posting Against Fines or Fees from the Charge Workspace**

Use the following to Post against fines or fees from the **Charge** workspace:

1. In the **Charge** workspace, type or scan the patron's barcode into the patron **Barcode** field and press **Enter**.
2. Select **Fine/Fee Info** from the **Charge/Renew** menu item or click the **Fines/Fees** button.

Result: The **Patron Fines/Fees** dialog box opens.

3. Follow [Procedure 4-18, Posting Against a Fine/Fee](#), on page [4-102](#).



#### **Procedure 4-20. Posting Against Fines or Fees from the Discharge Workspace**

Use the following to Post against fines or fees from the **Discharge** workspace:

1. In the **Discharge** workspace type or scan the item's barcode into the **Item Barcode** field and press **Enter**.

Result: The Fines column of the discharge list indicates any fines/fees attached to the discharged item.

2. Select **Collect Fines...** (**Ctrl + F**) from the Discharge menu.

Result: The **Patron Fines/Fees** dialog box opens.

3. Follow [Procedure 4-18, Posting Against a Fine/Fee](#), on page [4-102](#).

---

**NOTE:**

You can set the Discharge function to automatically display the **Patron Fines/Fees** dialog box when you discharge an item to which fines are attached. To do this, select **Prompt Fines/Print Discharge Slips** from the **Discharge** menu. A check mark indicates that the option has been turned on.

### **Printing Fines/Fees**

---

Operators can print patron fine/fee statements.

**NOTE:**

Fines and fees are displayed on the **Historical** tab until the patron record is deleted from the patron database.

The procedure for printing a fine/fee statement from the **Patron Fines/Fees** dialog box is shown in [Procedure 4-21, Printing Fines/Fees Statements from the Patron Fines/Fees Dialog Box](#).



#### **Procedure 4-21. Printing Fines/Fees Statements from the Patron Fines/Fees Dialog Box**

---

Use the following to print patron fine/fee statement from the **Patron Fines/Fees** dialog box:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record to which you want to post a payment. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select the **Fine/Fee** button on the Patron Record or select **Fine/Fee Info** from the **Patron** menu.

Result: The **Patron Fines/Fees** dialog box opens.

4. Determine the type of list that you want to print.
  - If the **Outstanding Fines/Fees** tab is active on the **Patron Fines/Fees** dialog box, a list of all current charges prints.
  - If the **Fines/Fees History** tab is active on the **Patron Fines/Fees** dialog box, a list of all historical charges and payments prints.
5. Click the **Print** button on the **Patron Fines/Fees** dialog box.

Result: The selected list prints.

---

### **Bursar Transfer System**

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The Bursar transfer program exports patron fine/fee information from the system to a data file that can be used by an outside agency.

See the *Voyager Technical User's Guide* for more information on how to run the bursar program.

The following types of transfers can be made:

- **Transferring Total Patron Balances:**  
When information is transferred in this fashion, only the patron information and the patron's current balance is transferred to the billing agency. If the patron has a credit with the library, individual credits would also be transferred to the billing agency. The billing agency has no information about specific charges.
- **Transferring Itemized Patron Fines/Fees:**  
Individual fine/fee information records and patron information are transferred to the billing agency. Specific information about the fines/fees are also transferred to the billing agency.

The bursar program creates an ASCII output file (Bursar SIF) of either patron fine/fee balances or patron balances to be transferred to the billing agency, and it credits the fines and fees exported with a bursar transfer transaction.

In the Voyager database the fine or fee is considered paid. A message displays on the **History** tab of the **Patron Fines/Fees** dialog box of the patron record.

The fine or fee may be corrected (reduced or waived) after the transfer to the billing agency by making a bursar refund debit/error credit to the patron's account in the Circulation module. The bursar refund credit is exported to the SIF at the next running of the bursar program.

Fines/fees can be viewed online as the patron's history of fine/fees. Click the **History** tab and notice the Fee/Posting Type column for a Bursar Transfer. You can select the Bursar Transfer and click the **Post** button. Select a posting type of **Payment** and enter the amount. This amount is considered a Bursar Refund in the next run of the batch program. In the next Circulation session the amount displays as **Forgive**.

The bursar refund credits the charge up to the amount paid by the bursar transfer and the balance due on that transaction becomes a negative amount. This negative amount is displayed as a current charge until the bursar program is run again and can debit this amount and transfer it to the bursar.

## **Patron Request Information**

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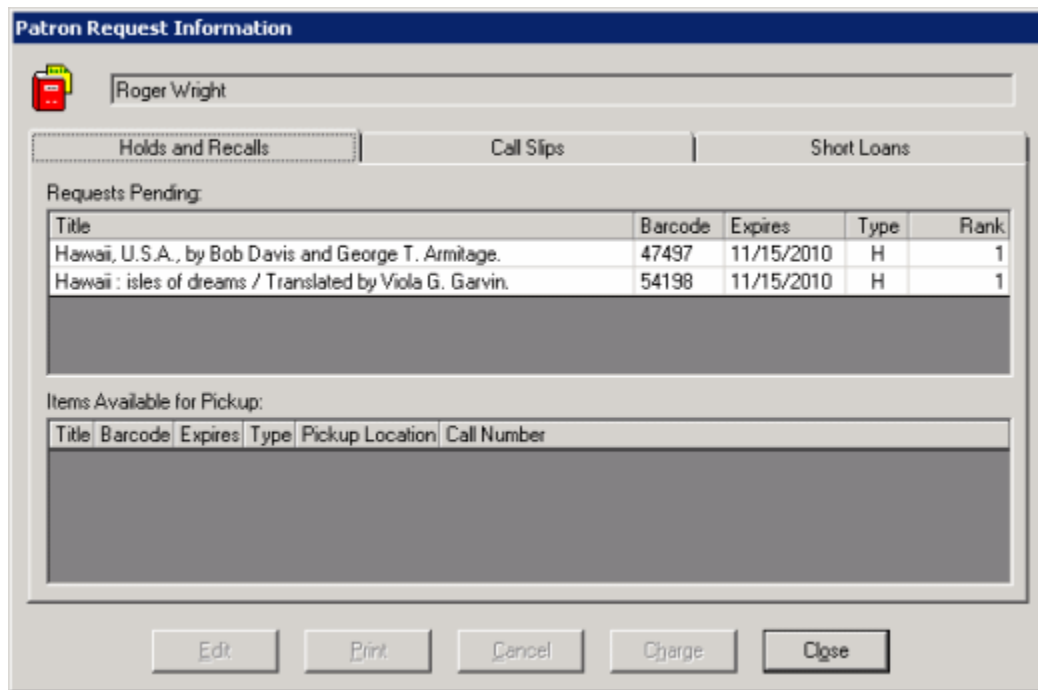
The Voyager Circulation module allows you to place and maintain the following types of requests for a patron:

- Holds and recalls are traditional library requests in which a patron is added to a waiting list for an item currently charged to another patron.
- Call slip requests can be used to initiate the retrieval of an item housed in a closed stack or remote storage facility.
- Short loan requests can be used to reserve materials for a specific date and time.

The **Patron Request Information** dialog box ([Figure 4-84](#)) is where requesting information is available and where request-related activity occurs in the Circulation module.

### **NOTE:**

The **Patron Request Information** dialog box does not display the Unicode character set. MARC data is converted to the Latin-1 character set.



The dialog box titled "Patron Request Information" features a header bar with the title. Below the header, there is a text field containing the name "Roger Wright". A tabbed interface follows, with three tabs: "Holds and Recalls" (which is selected), "Call Slips", and "Short Loans". Under the "Holds and Recalls" tab, there is a section labeled "Requests Pending:" containing a table with two rows of data. Below this is a section labeled "Items Available for Pickup:" containing an empty table. At the bottom of the dialog box, there are five buttons: "Edit", "Print", "Cancel", "Charge", and "Close".

Title	Barcode	Expires	Type	Rank
Hawaii, U.S.A., by Bob Davis and George T. Armitage.	47497	11/15/2010	H	1
Hawaii : isles of dreams / Translated by Viola G. Garvin.	54198	11/15/2010	H	1

Title	Barcode	Expires	Type	Pickup Location	Call Number
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**Figure 4-84. Patron Request Information**

**NOTE:**

The **Patron Request Information** dialog box can also be accessed from the Charge/Renew function.

The following tabs display on the **Patron Request Information** dialog box:

- Holds and Recalls
- Call Slips
- Short Loans

You can view request information on these tabs. In addition, you can do the following.

- Cancel a request
- Edit pending hold and recall requests
- Charge an available item
- Print a list of pending and available requests

## Security

---

Operators that have the **Add/Update Recall/Hold Requests** and/or **Resequence Recall/Hold Request Queues** check boxes selected on the **Profiles** tab in the **Security - Circulation Profile** workspace ([Figure 4-17 on page 4-20](#)) in the System Administration module have the ability to view, cancel, edit, charge, and print information from the **Patron Request Information** dialog box.

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information about setting up security with circulation profiles.

## Holds and Recalls Tab

---

From the **Holds and Recalls** tab of the **Patron Request Information** dialog box, operators can perform the following tasks.

- Access and view information regarding a patron's holds and recalls. See [Procedure 4-22, Accessing the Holds and Recalls Tab](#), on page [4-110](#).
- Cancel pending holds and recalls. See [Procedure 4-23, Canceling a Pending Hold or Recall](#), on page [4-111](#).
- Charge available requested items. See [Procedure 4-24, Charging an Available Hold or Recall](#), on page [4-112](#).
- Change the following for pending requests.
  - Request level from Title to Copy or Copy to Title
  - Location group
  - Pickup location
  - Expiration
  - Comment

See [Procedure 4-25, Editing Hold and Recall Requests](#), on page [4-113](#).

- Print patron request statements. See [Procedure 4-26, Printing Patron Request Statements](#), on page [4-115](#).



### TIP:

To facilitate easier identification and access to relevant information, you can sort all display columns. Click a column header such as *Title* to organize the display in ascending or descending sort order by title. Click the same header again to reverse the sort order. On the **Holds and Recalls** tab, you can sort both pending and available requests.

[Table 4-23](#) describes the **Holds and Recalls** tab.

**Table 4-23. Holds and Recalls Tab**

Name	Description
Name	Unlabeled field containing the patron's name.
Requests Pending section	
Title column	Title of the item requested.
Barcode	Barcode of the item requested.
Expires	Date the request expires.
Type	Type of Request either a Hold (H) or a Recall (R).
Rank	Rank of the request in the queue.
Items Available for Pickup section	
Title column	Title of the item available.
Barcode	Barcode of the item available.
Expires	Date the request expires.
Type	Type of Request either a Hold (H) or a Recall (R).
Pickup Location	Circulation happening location where the item should be routed for the patron to Pickup. This location was selected by the user when creating the request.
Call Number	Call number for the available item.
Buttons	
Edit	<p>Displays the Edit Request dialog box for pending requests enabling you to change the following options:</p> <ul style="list-style-type: none"> <li>• Request level (from Title to Copy or Copy to Title)</li> <li>• Location group (for title level requests only)</li> <li>• Pickup location</li> <li>• Expiration date</li> <li>• Comment</li> </ul>
Print	<p>Prints a Patron Request statement.</p> <p>Operators can customize the format in which you want the Patron Request information to print. They can change heading information, font sizes, and many other details. See <a href="#">Patron Requests (Holds and Recalls) Stanza</a> on <a href="#">page A-29</a> for more information on customizing print templates.</p>

**Table 4-23. Holds and Recalls Tab**

Name	Description
Cancel	Cancels the selected pending hold(s) or recall(s) from the Requests Pending list.  Operators can select more than one request by holding the Ctrl key while clicking each request.
Charge	Charges the available item selected from the Items Available for Pickup list.  Operators can select more than one item by holding the Ctrl key while clicking each item.
Close	Closes the Patron Request Information dialog box.

For more information about hold and recall requests see [Requests in the Circulation Module](#) on [page 5-77](#).

The procedure for accessing the **Holds and Recalls** tab of the **Patron Request Information** dialog box is shown in [Procedure 4-22, Accessing the Holds and Recalls Tab](#).



---

**Procedure 4-22. Accessing the Holds and Recalls Tab**

---

Use the following to access the **Holds and Recalls** tab of the **Patron Request Information** dialog box.

1. Click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to access. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Hold/Recall Info** from the **Patron** menu, or click the **Hold/Recall Information** button.

Result: The **Patron Request Information** dialog box opens displaying the **Holds and Recalls** tab.

---



The procedure for canceling a pending hold or recall from the **Patron Request Information** dialog box is shown in [Procedure 4-23, Canceling a Pending Hold or Recall](#).



---

**Procedure 4-23. Canceling a Pending Hold or Recall**

---

Use the following to cancel a pending hold or recall.

1. Click the **Patron** button from the Circulation toolbar, or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to cancel. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Hold/Recall Info** from the **Patron** menu, or click the **Hold/Recall Information** button.

Result: The **Patron Request Information** dialog box opens.

4. Select the request you want to cancel from the **Requests Pending** list.
5. Click the **Cancel** button.

Result: A message asking for confirmation of the cancel displays.

6. Click **Yes** to cancel the request and remove it from the **Pending Requests** list. Otherwise, click **No** to return the operator to the **Holds and Recalls** tab.
7. Click **Close** to close the **Patron Request Information** dialog box and return to the Patron Record.

Result: The Patron Record displays.

---

The procedure for charging an available hold or recall from the **Patron Request Information** dialog box is shown in [Procedure 4-24, Charging an Available Hold or Recall](#).



#### Procedure 4-24. Charging an Available Hold or Recall

---

Use the following to charge an available hold or recall.

1. Click the **Patron** button from the Circulation toolbar, or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to charge. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Hold/Recall Info** from the **Patron** menu, or click the **Hold/Recall Information** button.

Result: The **Patron Request Information** dialog box opens.

4. Select the item(s) you want to charge from the **Items Available for Pickup** list.
5. Click the **Charge** button.

Result: The item(s) are charged to the requesting patron and removed from the list.

6. Click **Close** to close the **Patron Request Information** dialog box and to return to the Patron Record, or click the **Charged Items** button to display the **Charged Items Index** which lists the newly-charged requested item. See [Figure 4-85](#).

**Charged Items Index**

0000000000 Diane Zientara Total: 2

Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Progress in the treatment of leukemia.	616.155 P536p	Main	BOOK	52660	7/26/2012 04:00 AM	Charged 6/25/2012
Ring of endless light / Madeleine L'Engle.	PZ7.L5385 Ri 1980	Juvenile Education	BOOK	95706	7/26/2012 04:00 AM	Charged 6/25/2012

Buttons: Item Info... Print Select All Discharge Modify Due Date... Renew Close

**Figure 4-85. Charged Items Index Listing the Newly-Charged Requested Item**

The procedure for editing pending holds and/or recalls from the **Patron Request Information** dialog box is shown in [Procedure 4-25, Editing Hold and Recall Requests](#).



#### **Procedure 4-25. Editing Hold and Recall Requests**

Use the following to edit hold and recall requests.

1. Click the **Patron** button from the Circulation toolbar, or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to edit. See [Searching for a Patron Record](#) on [page 3-2](#).

3. Select **Hold/Recall Info** from the **Patron** menu, or click the **Hold/Recall Information** button.

Result: The **Patron Request Information** dialog box opens.

4. Select a title from the **Requests Pending** list, and click the **Edit** button.

Result: The **Edit Request** dialog box opens. See [Figure 4-86](#).

---

**Edit Request**

Patron Information

Name: Robert Researcher

Barcode: 2966

Group: Graduate Student

☐ Library Administrative Request

Jungle books, with illus. by Aldren Watson. Foreword by Nelson Doubleday. 51081

Request Type:

☒ Hold ☐ Recall ☐ Call Slip ☐ Remote Storage ☐ Short Loan

Requesting

☒ Title ☐ Copy

For Items At: Any Location

Pickup At: Circulation Desk

Expires: 12/21/2007

Comment:

OK Cancel

---

**Figure 4-86. Edit Request dialog box**

5. Make the changes needed.

Operators can change the following options for pending requests:

- Request level (Title to Copy or Copy to Title).

When making this change, be aware of the following:

- Changing a Copy level hold request to a Title level request may place requests on other items (within Circulation policy rules).
- Changing a Title level hold request to a Copy level request lets you select a specific item for the request and removes requests from any other available items.
- Changing a recall request from copy to title may change which specific item is actually recalled.

For more information about Title level and Copy level hold and recall requests, see [Procedure 5-21](#), [Placing Requests](#), on page [5-83](#) and [Table 5-25](#) on [page 5-85](#).

- Location group (for title level requests only)
- Pickup location
- Expiration date

- Comment

**NOTE:**

**Patron Information** and **Request Type** (hold/recall) changes are not permitted.

6. Click **OK**.

Result: The editing changes are saved and the **Edit Request** dialog box closes.

---

The procedure for printing patron request statements from the **Patron Request Information** dialog box is shown in [Procedure 4-26, Printing Patron Request Statements](#).



---

**Procedure 4-26. Printing Patron Request Statements**

---

Use the following to print a patron request statement.

1. Click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to print. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Hold/Recall Info** from the **Patron** menu or click the **Hold/Recall Information** button.

Result: The **Patron Request Information** dialog box opens.

4. Select a title from the **Requests Pending** list and click the **Print** button.

Result: The patron's request(s) are printed.

5. Click **Close** to close the **Patron Request Information** dialog box and to return to the Patron Record.

---

**Patron Call Slips**

---

Call Slips are requests placed for a item in a closed stack area or remote storage facility.

From the **Patron Call Slips** tab ([Figure 4-87](#)) of the **Patron Request Information** dialog box the operator can perform the following tasks:

- access and view information regarding a patron's call slips
- cancel a call slip request
- charge a call slip request
- print a patron's call slip information

The screenshot shows the 'Patron Request Information' dialog box with the 'Call Slips' tab selected. The patron's name is 'Robert Researcher'. The 'Call Slips' tab contains a table with the following data:

Requested	Title	Barcode	Enumeration	Chronology	Year	Pickup Location	Status/Date
11/14/2007	American journal of medical technology.	8042165987				Circulation Desk	Accepted 11/14/2007

Below the table are fields for 'Date Processed', 'No-Fill Reason', 'Holdings Location' (set to 'Main'), and 'Comment'. At the bottom are buttons for 'Edit', 'Print', 'Cancel', 'Charge', and 'Close'.

**Figure 4-87. Call Slips Tab**

**NOTE:**

To facilitate easier identification and access to relevant information, operators can sort all display columns. A click of the column header, such as the Title column header, organizes the display in ascending or descending sort order by title; a second click of the same header reverses the sort by title.

[Table 4-24](#) describes the **Call Slips** tab.

**Table 4-24. Call Slips Tab**

Name	Description
Name	Unlabeled field containing the patron's name.
Requested column	Date the request was made.
Title column	Title of the item requested.
Barcode	Barcode of the item requested.

**Table 4-24. Call Slips Tab**

Name	Description
Enumeration	Enumeration from the item record.
Chronology	Chronology from the item record.
Year	Year from the item record.
Pickup Location	The Circulation happening location where the item should be routed for the patron to pick up. This location is selected by the patron when placing the request.
Status/Date	Status of the request and date placed.
Date Processed	Date the call slip was processed.
No-Fill Reason	Reason that a call slip was not able to be filled.
Holdings Location	Holdings location.
Comment	Comments.
Buttons	
Print	Prints the patron's call slip requests.  User can customize the format in which you want the patron call slip information to print, changing heading information, font sizes, and other details. See <a href="#">Patron Call Slips Stanza</a> on <a href="#">page A-32</a> .
Cancel	Cancels the selected call slip request.  Users can select more than one request by holding the Ctrl key while clicking each request.
Charge	Charges the item selected from the request list.  Users can select more than one item by holding the Ctrl key while clicking each item.
Close	Closes the Patron Request Information dialog box.

For more information about Call Slips see the *Voyager Call Slip User's Guide* and [Call Slip Request](#) on [page 5-78](#) of this user's guide.

The procedure for accessing the **Call Slips** tab from the **Patron Request Information** dialog box is shown in [Procedure 4-27, Accessing the Call Slips Tab](#).



---

**Procedure 4-27. Accessing the Call Slips Tab**

---

Use the following to access the **Call Slips** tab of the **Patron Request Information** dialog box.

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to access. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Call Slips** from the **Patron** menu or click the **Hold/Recall Information** button.

If you click the **Hold/Recall Information** button, you must then click the **Call Slips** tab.

Result: The **Call Slips** tab opens (see [Figure 4-88](#)).

---

The screenshot shows the 'Patron Request Information' dialog box with the 'Call Slips' tab selected. The dialog box has a title bar 'Patron Request Information' and a search field containing 'Robert Researcher'. Below the search field are three tabs: 'Holds and Recalls', 'Call Slips' (selected), and 'Short Loans'. The 'Call Slips' tab contains a table with the following data:

Requested	Title	Barcode	Enumeration	Chronology	Year	Pickup Location	Status/Date
11/14/2007	American journal of medical technology.	8042165987				Circulation Desk	Accepted 11/14/2007

Below the table are several input fields: 'Date Processed:', 'No-Fill Reason:', 'Holdings Location: Main', and 'Comment:'. At the bottom are five buttons: 'Edit', 'Print', 'Cancel', 'Charge', and 'Close'.

---

**Figure 4-88. Call Slips Tab of the Patron Request Information Dialog Box**

---



The procedure for canceling a Call Slip is shown in [Procedure 4-28, Canceling a Call Slip](#).



---

**Procedure 4-28. Canceling a Call Slip**

---

Use the following to cancel a Call Slip:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

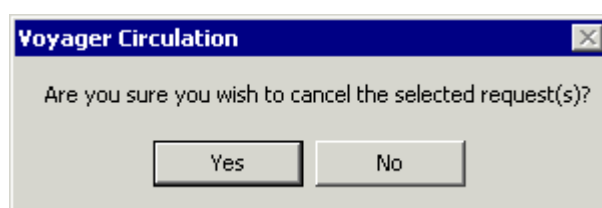
2. Search for and display the patron record whose requests you want to access. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Call Slips** from the **Patron** menu or click the **Hold/Recall Information** button.

If you click the **Hold/Recall Information** button, you must then click the **Call Slips** tab.

Result: The **Call Slips** tab opens.

4. Select the Call Slip that you want to cancel and then click the **Cancel** button.

Result: A confirmation message displays (see [Figure 4-89](#)).



---

**Figure 4-89. Confirmation Message Before Canceling a Call Slip**

---

5. Click **Yes** to cancel the Call Slip.

Result: The Call Slip is canceled. The **Status/Date** field indicates that it has been canceled.

---

The procedure for charging a Call Slip is shown in [Procedure 4-29, Charging a Call Slip](#).



---

#### Procedure 4-29. Charging a Call Slip

---

Use the following to charge a **Call Slip**:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to access. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Call Slips** from the **Patron** menu or click the **Hold/Recall Information** button.

If you clicked the **Hold/Recall Information** button, you must then click the **Call Slips** tab.

Result: The **Call Slips** tab opens.

4. Select the Call Slip you want to charge and click the **Charge** button.

Result: The Call Slip is charged.

---

The procedure for printing Call Slip requests is shown in [Procedure 4-30, Printing Call Slip Requests](#).



---

#### Procedure 4-30. Printing Call Slip Requests

---

Use the following to print a list of Call Slips:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to access. See [Searching for a Patron Record](#) on [page 3-2](#).

3. Select **Call Slips** from the **Patron** menu or click the **Hold/Recall Information** button.

If you clicked the **Hold/Recall Information** button, you must then click the **Call Slips** tab to view that information.

Result: The **Call Slips** tab opens.

4. Click the **Print** button.

Result: The Call Slip list prints.

---

### **Patron Short Loans**

Short Loans allow your patrons to place a reservation on an item for a specific time period. The item is then picked up and charged out at the scheduled time.

From the **Short Loans** tab ([Figure 4-90](#)) of the **Patron Request Information** dialog box the operator can perform the following tasks:

- access and view information regarding a patron's short loan requests
- cancel a short loan request
- charge available items
- print a short loan request statements

The screenshot shows a software window titled "Patron Request Information". At the top left is a small icon of a person with a magnifying glass. Next to it is a text field containing the name "Roger Wright". Below this is a tabbed interface with three tabs: "Holds and Recalls", "Call Slips", and "Short Loans". The "Short Loans" tab is currently selected. Under this tab, there are two sections. The first is "Requests Pending:", which contains a table with five columns: "Title", "Barcode", "Pickup Location", "Start Time", and "End Time". The table body is empty. The second section is "Items Available for Pickup:", which contains a table with six columns: "Title", "Barcode", "Pickup Location", "Start Time", "End Time", and "Call Number". This table body is also empty. At the bottom of the window are five buttons: "Edit", "Print", "Cancel", "Charge", and "Close".

**Figure 4-90. Short Loans Tab**

**NOTE:**

To facilitate easier identification and access to relevant information, operators can sort all display columns. A click of the column header, such as the Title column header, organizes the display in ascending or descending sort order by title; a second click of the same header reverses the sort by title.

[Table 4-25](#) describes the **Short Loans** tab.

**Table 4-25. Short Loans Tab**

Name	Description
Name	Unlabeled field containing the patron's name.
Requests Pending section	
Title column	Title of the item requested.
Barcode	Barcode of the item requested.
Pickup Location	Circulation happening location where the item should be routed for the patron to Pickup.

**Table 4-25. Short Loans Tab**

Name	Description
Start Time	Beginning time of the short loan request.
End Time	Ending time of the short loan request.
Items Available for Pickup section	
Title column	Title of the item available.
Barcode	Barcode of the item available.
Pickup Location	Circulation happening location where the item should be routed for the patron to Pickup.
Start Time	Beginning time of the short loan request.
End Time	Ending time of the short loan request.
Call Number	Call number for the available short-loan item.
Buttons	
Print	Prints the patron's call slip requests.  User can customize the format in which you want the patron call slip information to print, changing heading information, font sizes, and other details. See <a href="#">Patron Call Slips Stanza</a> on <a href="#">page A-32</a> .
Cancel	Cancels the selected call slip request.  Users can select more than one request by holding the Ctrl key while clicking each request.
Charge	Charges the item selected from the request list.  Users can select more than one item by holding the Ctrl key while clicking each item.
Close	Closes the Patron Request Information dialog box.

See [Short Loans](#) on [page 10-1](#) of this user's guide for more information about short loans.

The procedure for accessing the short loans tab is shown in [Procedure 4-31, Accessing the Short Loans Tab](#).



---

### Procedure 4-31. Accessing the Short Loans Tab

---

Use the following to access the **Short Loans** tab of the **Patron Request Information** dialog box:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to access. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Short Loan Info** from the **Patron** menu or by click the **Hold/Recall Information** button.

If you clicked the **Hold/Recall Information** button, you must then click the **Short Loan** tab.

Result: The **Short Loans** tab opens.

#### **NOTE:**

To facilitate easier identification and access to relevant information, you can sort all display columns in Voyager Circulation. A click of the column header (for example, Title) organizes the display in ascending or descending sort order; a second click of the same header reverses the sort.

---

The procedure for canceling a short loan request is shown in [Procedure 4-32, Canceling a Short Loan](#).



---

### Procedure 4-32. Canceling a Short Loan

---

Use the following to cancel a **Short Loan** request:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to access. See [Searching for a Patron Record](#) on [page 3-2](#).

3. Select **Short Loan Info** from the **Patron** menu or by click the **Hold/Recall Information** button.

If you clicked the **Hold/Recall Information** button you must then click the **Short Loans** tab to view that information.

Result: The **Short Loans** tab opens.

4. Select the Short Loan you want to cancel and then click the **Cancel** button. You can select more than one item by holding the **Ctrl** key while clicking each item.

Result: A confirmation message displays.

5. Click **Yes** to cancel the Short Loan.

Result: The Short Loan is removed from the **Short Loans** tab.

---

The procedure for printing a short loan request is shown in [Procedure 4-33, Printing a Short Loan](#).



---

#### **Procedure 4-33. Printing a Short Loan**

---

Use the following to print a **Short Loan** request:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar, or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to access. See [Searching for a Patron Record](#) on [page 3-2](#).

3. Select **Short Loan Info** from the **Patron** menu or by click the **Hold/Recall Information** button.

Result: When you select **Short Loan Info** from the **Patron** menu, the **Patron Request Information** dialog box automatically opens on the **Short Loan** tab.

If you clicked the **Hold/Recall Information** button, you must then click the **Short Loans** tab.

Result: The **Short Loans** tab opens.

4. Click the **Print** button.

Result: The Patron Short Loan Request statement prints.

---

The procedure for charging a short loan is shown in [Procedure 4-34, Charging a Short Loan](#).



#### **Procedure 4-34. Charging a Short Loan**

---

Use the following to charge a **Short Loan** request:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display the patron record whose requests you want to access. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Short Loan Info** from the **Patron** menu or by click the **Hold/Recall Information** button.

If you clicked the **Hold/Recall Information** button, you must then click the **Short Loan** tab.

Result: The **Short Loans** tab opens.

4. To charge an available short loan item, select an item from the **Items Available for Pickup** list and then click the **Charge** button. You can select more than one item by holding the **Ctrl** key while clicking each item.

Result: The item is charged.

---

### **Patron Notes**

The **Notes** dialog box allows operators to enter additional information that is associated with a patron.



---

## Security

---

Operators that have the **Add/Update Patron Records** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to add notes (see [Figure 4-17 on page 4-20](#)).

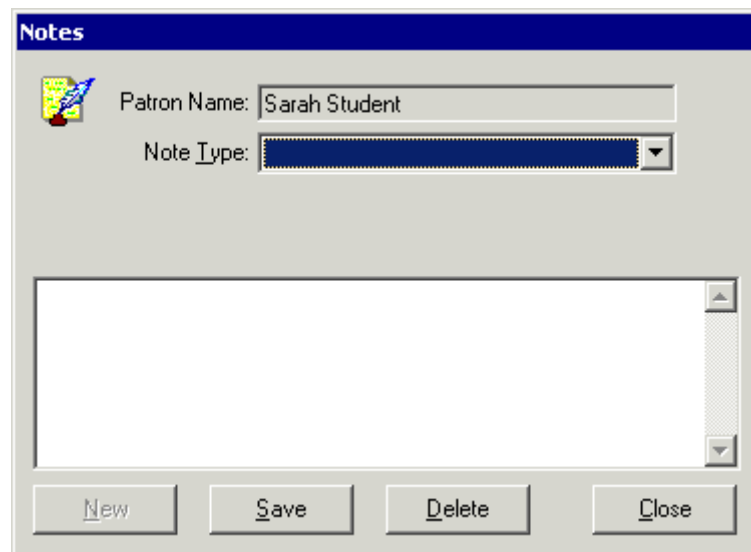
See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

---

## Notes Dialog Box

---

The **Notes** dialog box displays in [Figure 4-91](#).



---

**Figure 4-91. Patron Notes Dialog Box**

There are system- and user-defined Note Types. The following types of system-defined notes are available:

- general
- address
- barcode
- phone

- pop-up

All of these types are free-text notes.

A pop-up note displays when the patron's barcode is accessed, for example, at charge/renew or while placing a request. The pop-up note also displays when the patron's record is retrieved. The Patron Pop-up Note Alert is set in Circulation Session Preferences to identify if patron pop-up notes display. See [Alerts, Printing, and Fines/Fees/Demerits](#) on [page 13-2](#) for more information.

[Table 4-26](#) describes the fields on the **Notes** dialog box.

**Table 4-26. Notes Dialog Box**

Field	Description
Patron Name	The name of the patron.
Note Type	Type of note, system- and user-defined. The following are the system-defined options: <ul style="list-style-type: none"><li>• general</li><li>• address</li><li>• barcode</li><li>• phone</li><li>• pop-up</li></ul> See the <i>Voyager System Administration User's Guide</i> for user-defined note type setup.  <b>NOTE:</b> Only one pop-up note per patron record is allowed.
Free text box	Unlabeled box containing the text of the note.
New button	Add a note to the patron record.
Save button	Saves the note to the patron record.
Delete button	Deletes a patron note.
Close button	Closes the Notes dialog box.

The procedure for accessing the **Notes** dialog box is shown in [Procedure 4-35, Accessing the Notes Dialog Box](#).



---

**Procedure 4-35. Accessing the Notes Dialog Box**

---

Use the following to access the **Notes** dialog box:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).

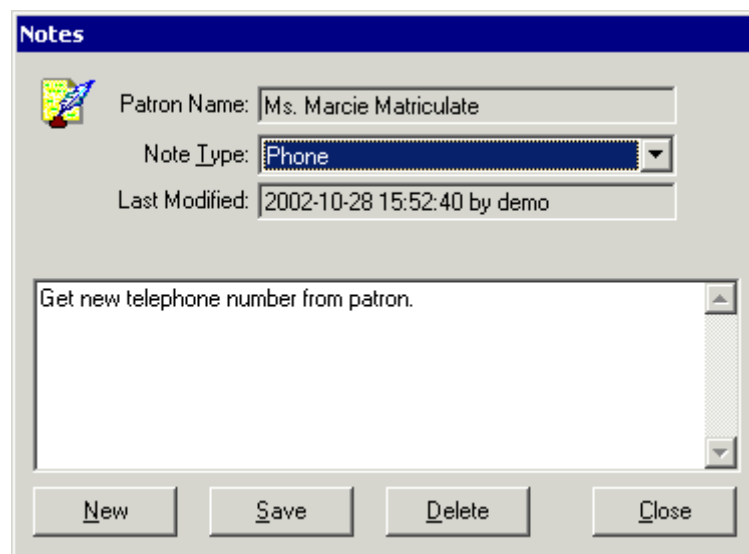
3. Select **Notes...** from the **Patron** menu or click the **Notes** button in the patron record.

Result: The **Notes** dialog box opens.

4. To view an existing note, select the note from the **Note Type** drop-down list.

Result: The information displays in the **Notes** dialog box (see [Figure 4-92](#)).

---



---

**Figure 4-92. Viewing the Phone Note Type**

---

## Adding a Note to a Patron Record

Operators may add notes to the patron record.

The procedure for adding a note to a patron record is shown in [Procedure 4-36, Adding a Note to a Patron Record](#).



---

### Procedure 4-36. Adding a Note to a Patron Record

---

Use the following to add a note to a patron record:

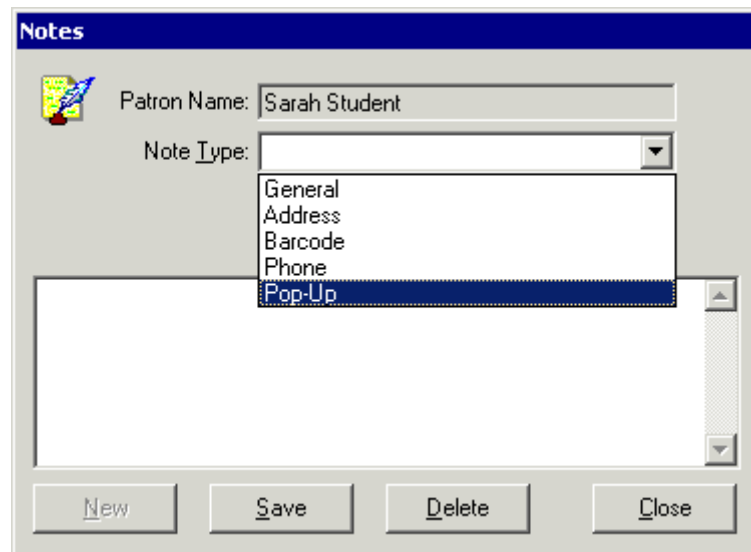
1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Notes...** from the **Patron** menu or click the **Notes** button in the patron record.

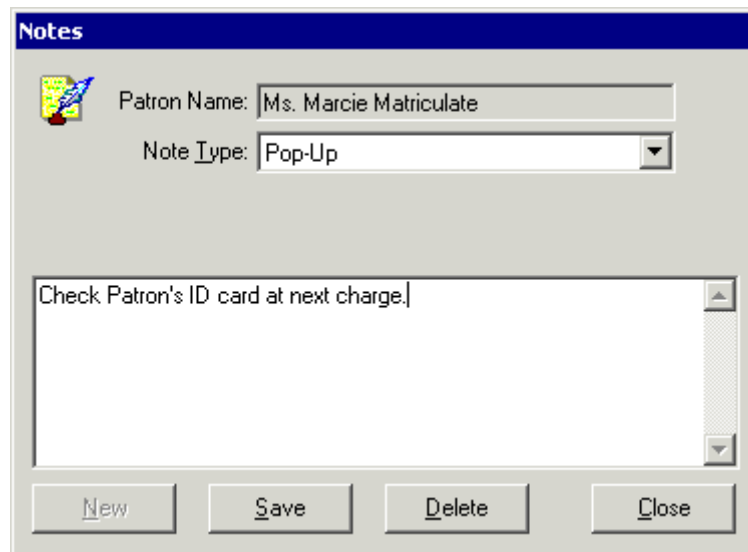
Result: The **Notes** dialog box opens.

4. Click the **New** button to create a new note.
5. Select a **Note Type** from the list (see [Figure 4-93](#)).



**Figure 4-93. Note Type Drop-Down List**

6. Place the cursor in the free text box and enter the information you want as your note. [Figure 4-94](#) shows an example of a Pop-up note.



---

**Figure 4-94. Example of a Pop-Up Note**

7. Click the **Save** button to save the information.
8. Click **Close** to exit the **Notes** dialog box.

Result: The Pop-up note has been added to the patron's record.

---

### Deleting a Note from a Patron Record

Operators may delete notes from patron records at any time.

The procedure for deleting a note from a patron record is shown in [Procedure 4-37, Deleting a Note from a Patron Record](#).



---

### Procedure 4-37. Deleting a Note from a Patron Record

---

Use the following to delete a note from a patron record:

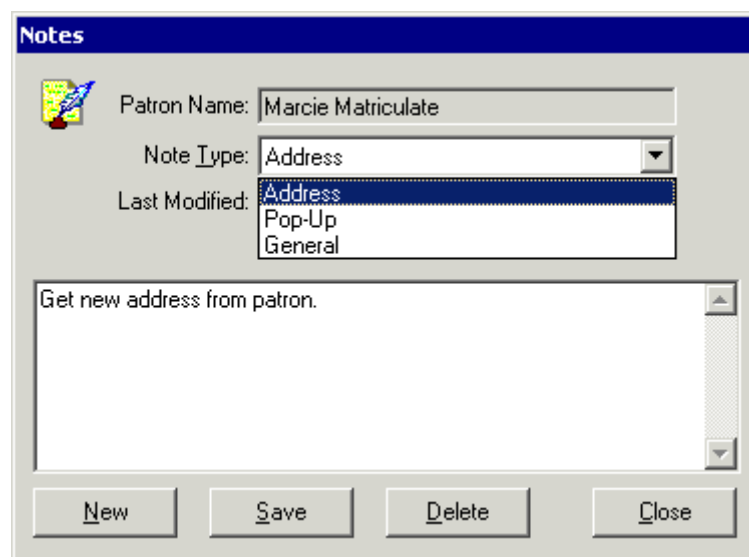
1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Notes...** from the **Patron** menu or click the **Notes** button in the patron record.

Result: The **Notes** dialog box opens.

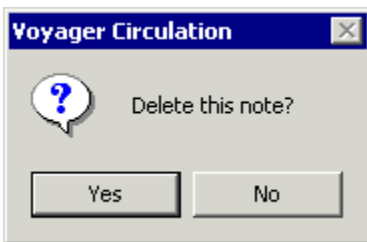
4. Select the **Note Type** from the list to determine the correct note to delete (see [Figure 4-95](#)).



**Figure 4-95. Drop-Down of Notes to Delete from this Patron Record**

5. Click **Delete** to delete a note and the information associated with it.

Result: A message asking for confirmation of the deletion displays (see [Figure 4-96](#)).



---

**Figure 4-96. Confirmation Message to Delete a Note**

6. Click **Yes** to delete the note. Otherwise, click **No** if you do not want to delete this note.

Result: If you clicked **Yes**, the note was deleted.

---

## Setting Patron Counters

---

The **Set Patron Counters** dialog box allows an operator with the proper authority to set the patron counters.

### Security

---

Operators that have the **Reset Patron Record Counters** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to reset patron counters (see [Figure 4-17 on page 4-20](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

### Set Patron Counters Dialog Box

---

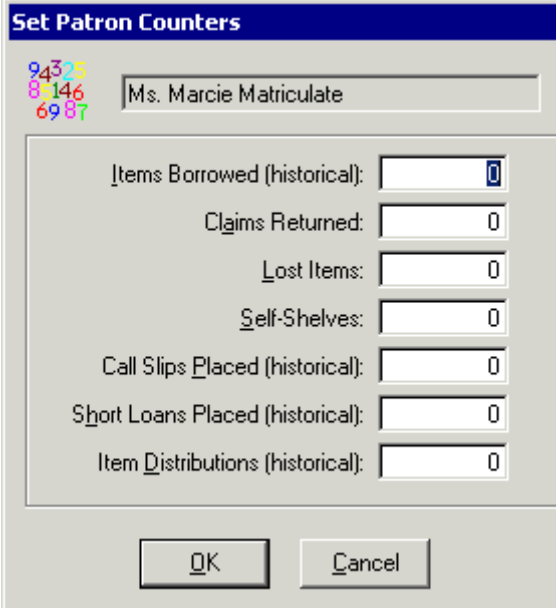
The **Set Patron Counters** dialog box contains the following patron counters:

- Items Borrowed (historical)
- Claims Returned
- Lost Items
- Self-Shelves



- Call Slips placed (historical)
- Short Loans placed (historical)
- Item Distributions (historical)

[Figure 4-97](#) shows the **Set Patron Counters** dialog box.



The dialog box is titled "Set Patron Counters" in a blue header bar. Below the header, on the left, is a small graphic of a barcode with the numbers 94325, 8146, and 6987. To the right of the graphic is a text field containing "Ms. Marcie Matriculate". Below this, there are seven rows of labels and input fields, each with a value of 0. The labels are: "Items Borrowed (historical):", "Claims Returned:", "Lost Items:", "Self-Shelves:", "Call Slips Placed (historical):", "Short Loans Placed (historical):", and "Item Distributions (historical):". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

**Figure 4-97. Set Patron Counters Dialog Box**

**NOTE:**

If you participate in Universal Borrowing, a patron record includes several Universal Borrowing counters, some of which can be edited. See the *Voyager Universal Borrowing User's Guide* for more information.

[Table 4-27](#) describes the **Set Patron Counters** dialog box.

**Table 4-27. Set Patron Counters Dialog Box**

Name	Description
Items Borrowed (historical)	<p>Total historical number of items the patron has borrowed (not just the items the patron currently has charged out).</p> <p>Increments automatically.</p> <p>Must be manually reset.</p>
Claims Returned	<p>Total number of times a patron has claimed to have returned an item even though the system does not recognize the item as returned.</p> <p>Increments manually. The circulation operator applies the status of Claims Returned to the item. Once the Claims Returned status has been assigned to the item, the system increments the patron's Claims Returned counter by 1.</p> <p>This increment is not subtracted when the Claims Returned status is removed from the item.</p> <p>Once a patron's Claims Returned counter reaches the maximum number of claimed returns allowed for that patron's patron group, the system blocks the patron until the Claims Returned counter is manually reduced.</p> <p>For block information see <i>Defining Circulation Blocks</i> in the <i>Voyager System Administration User's Guide</i> for more information.</p>

Table 4-27. Set Patron Counters Dialog Box

Name	Description
Lost Items	<p>Total number of items that have been recorded as lost by the patron.</p> <p>There are two ways an item can be recorded as lost:</p> <ul style="list-style-type: none"> <li>• Lost Interval is surpassed, therefore it increments automatically.</li> </ul> <p>See <i>Add - Circulation Policy Matrix Record Settings Dialog Box</i> in the <i>Voyager System Administration User's Guide</i> for more information.</p> <ul style="list-style-type: none"> <li>• staff member manually applies the status of Lost to the item, therefore it increments manually.</li> </ul> <p>When an item is marked as lost, the patron's Lost Items counter increments by 1. The operator will have to manually decrement the patron's counter if the item is found or returned.</p> <p>Once a patron's Lost Item counter reaches the maximum number of lost items allowed for that patron's patron group, the system blocks the patron until the Lost Items counter is manually reduced.</p> <p>For block information see <i>Defining Circulation Blocks</i> in the <i>Voyager System Administration User's Guide</i>.</p>
Self-Shelves	<p>Total number of times a patron has apparently self-shelved an item without turning the item in to be discharged.</p> <p>Increments automatically.</p> <p>If a patron brings an item to the circulation desk to have charged out and the circulation operator finds that the item is still charged out to another patron, when the operator charges out the item to the new patron, the previous patron's Self-Shelves counter increments by 1.</p> <p>Once a patron's Self-Shelves counter reaches the maximum number of self-shelves allowed for that patron's patron group, the system blocks the patron until the Self-Shelves counter is manually reduced.</p> <p>For block information see <i>Defining Circulation Blocks</i> in the <i>Voyager System Administration User's Guide</i> for more information.</p>

**Table 4-27. Set Patron Counters Dialog Box**

Name	Description
Call Slips Placed (historical)	Displays the total historical number of call slip requests the patron has placed (not just the call slip requests the patron currently has placed).  Increments automatically.  Must be manually reset.
Short Loans Placed (historical)	Displays the total historical number of short loanable items the patron has charged (not the number of short loan requests the patron has placed).  Increments automatically.  Must be manually reset.
Item Distributions (historical)	Displays the total historical number of distributable items the patron has received.  Increments automatically.  Must be manually reset.

The procedure for setting or resetting patron counters is shown in [Procedure 4-38, Setting or Resetting Patron Counters](#).



---

**Procedure 4-38. Setting or Resetting Patron Counters**

---

Use the following to set or reset patron counters:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Set Counters...** from the **Patron** menu or click the **Counters** button in the patron record.

Result: The **Set Patron Counters** dialog box opens (see [Figure 4-98](#)).

**Set Patron Counters**

94325  
8146  
6987

Ms. Marcie Matriculate

Items Borrowed (historical): 7

Claims Returned: 2

Lost Items: 1

Self-Shelves: 0

Call Slips Placed (historical): 4

Short Loans Placed (historical): 0

Item Distributions (historical): 0

OK Cancel

**Figure 4-98. Set Patron Counters Dialog Box**

4. Place your cursor in the field you want to edit.
5. Modify the value.
6. Click **OK** to save your changes and close the **Set Patron Counters** dialog box. Otherwise, click **Cancel** to close the dialog box without saving.

## Patron Statistical Information

For statistical purposes, a site can define types of patron characteristics that are not needed for circulation but are useful for statistical compilations. For example, a site may have one patron group for high school students but more than one high school in their area. Statistical categories could be created for each of the high schools so the site could keep track of how many students from each high school have registered at their library.

The statistical categories are not associated with any one patron group and there is no limit on the number created. When an operator creates a patron record, an operator can select one or more statistical categories from the list.

Statistical Categories for patrons are created in System Administration. See *Statistical Categories* in the *Voyager System Administration User's Guide* for more information.

## Security

---

Operators that have the **Add/Update Patron Records** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to apply and remove categories (see [Figure 4-17 on page 4-20](#)).

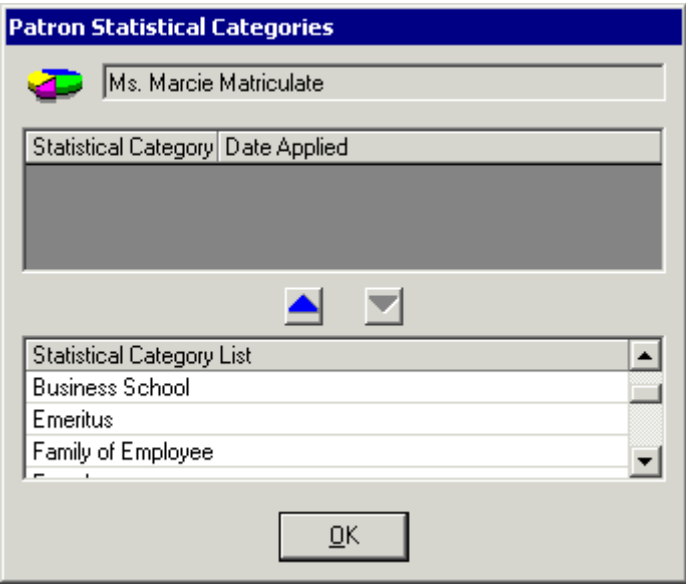
See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

## Patron Statistical Categories Dialog Box

---

The **Patron Statistical Categories** dialog box ([Figure 4-99](#)) opens when you click the **Statistics** button from an open patron record. The **Patron Statistical Categories** dialog box contains the following areas:



- the upper list box displays the statistical categories that have been selected for the patron
- the lower list box contains the all remaining statistical categories.



**Figure 4-99. Patron Statistical Categories Dialog Box**

[Table 4-28](#) describes the **Patron Statistical Categories** dialog box.

**Table 4-28. Patron Statistical Categories Dialog Box**

Name	Description
Name	Unlabeled field containing the name of the patron.
Statistical Category column	Statistical categories that are currently associated with the patron.
Date Applied	Date when the corresponding statistical category was applied to the patron.
Up and  Down arrow buttons 	The Up arrow moves a selected statistical category from the Statistical Category List to the Statistical Category column, thereby assigning it to the patron.  The Down arrow moves a selected statistical category from the Statistical Category column to the Statistical Category list, thereby removing it from the patron.

**Table 4-28. Patron Statistical Categories Dialog Box**

Name	Description
Statistical Category List	List of all available Statistical Categories to which a patron may be associated.  These are defined in the System Administration module. See <i>Statistical Categories</i> in the <i>Voyager System Administration User's Guide</i> for more information.
OK button	Saves the information in the <b>Patron Statistical Category</b> dialog box.

The procedure for applying a patron statistical category is shown in [Procedure 4-39, Applying a Patron Statistical Category](#).



---

**Procedure 4-39. Applying a Patron Statistical Category**

---

Use the following to apply a patron statistical category:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Statistical Categories...** from the **Patron** menu or click the **Statistics** button in the patron record.

Result: The **Patron Statistical Categories** dialog box opens (see [Figure 4-100](#)).

4. To add a category, select it in the lower list box and click the blue **up** arrow (or double-click the category). In this example, the categories of Business School and Female were added.

Result: The category is applied to the patron record and displays in the upper list box. Notice the statistical category is removed from the lower list box (see [Figure 4-100](#)).



Statistical Category	Date Applied
Business School	10/29/2002
Female	10/29/2002

Statistical Category List

- Emeritus
- Family of Employee
- High School Student

OK

**Figure 4-100. Patron Statistical Categories Dialog Box, Added Categories**

- Click the **OK** button to save your changes and close the **Patron Statistical Categories** dialog box. If you do not want to add the category, move it back to the Statistical Category list by using the down arrow.

Result: If you clicked **OK**, the category is applied.

The procedure for removing a patron statistical category is shown in [Procedure 4-40, Removing a Patron Statistical Category](#).



#### **Procedure 4-40. Removing a Patron Statistical Category**

Use the following to remove a patron statistical category:

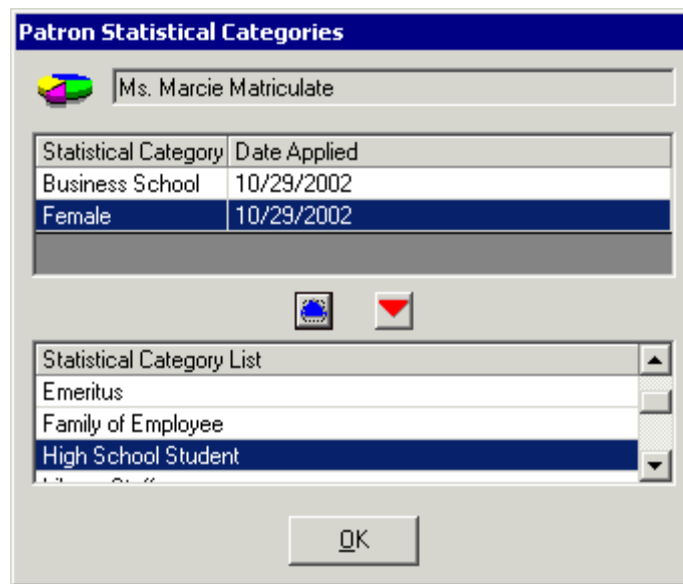
- After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
3. Select **Statistical Categories...** from the **Patron** menu or click the **Statistics** button in the patron record.

Result: The **Patron Statistical Categories** dialog box opens (see [Figure 4-101](#)).

---

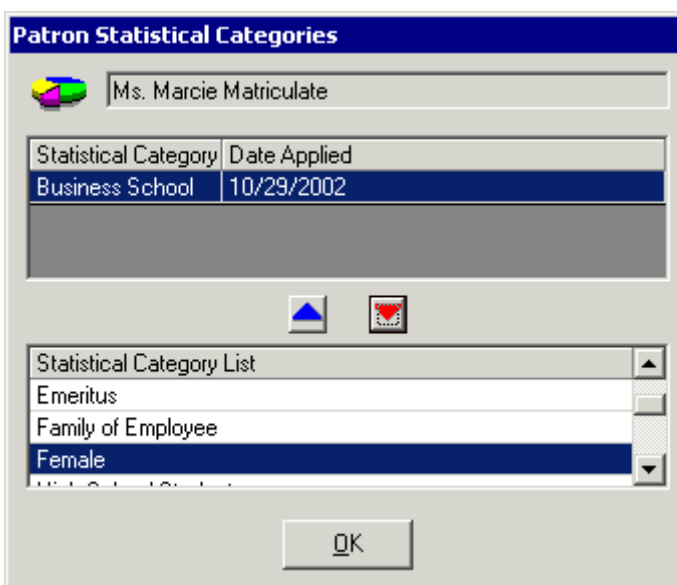


---

**Figure 4-101. Patron Statistical Categories Dialog Box**

4. Select the category in the upper list box you want to remove and click the red down arrow (or double-click the category).

Result: The status moves to the lower list box, removing it from the record (see [Figure 4-102](#)).



**Figure 4-102. Patron Statistical Categories Dialog Box, Removed Category**

5. Click the **OK** button to save your changes and close the **Patron Statistical Categories** dialog box.

Result: The category is removed.

## Creating Proxy Patrons

Proxy patrons are patrons who are authorized to charge items for other patrons.

Operators can establish a list of proxy patrons whom the displayed patron (the sponsor patron) has allowed to charge items out using the barcode of the sponsor instead of their own. For example, the operator might be dealing with students working with a particular professor.

In the **Proxy Patron Maintenance** dialog box you can establish and maintain the connection between a proxy patron and the sponsor patron. Once established, proxy patron information displays on the **Proxy Patron** tab of a patron record (see [Figure 4-103](#)).

Patron Name	Patron Barcode	Patron Group	Expires	Created
Learner, Lana	245245245	Undergraduate Student	12/16/2002	12/19/2002 by
Student, Sarah	STUDENT1	Undergraduate Student	10/31/2003	10/18/2002 by

---

**Figure 4-103. Proxy Patron Tab**

## Security

---

Operators that have the **Add/Update Proxy Patron** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to add, update, or delete a proxy patron (see [Figure 4-17 on page 4-20](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

## Proxy Patron Maintenance Dialog Box

[Figure 4-104](#) shows the **Proxy Patron Maintenance** dialog box.

**Figure 4-104. Proxy Patron Maintenance Dialog Box**

[Table 4-29](#) describes the **Proxy Patron Maintenance** dialog box.

**Table 4-29. Proxy Patron Maintenance Dialog Box**

Field	Description
Sponsor Name (field not labeled)	Name of the sponsor patron.
Proxies for	Barcode and patron group of the sponsor patron.
Patron Name	Proxy patron's name.
Patron Barcode	Proxy patron's barcode.
Patron Group	Proxy patron's patron group.
Expires	Date on which a patron can no longer act as proxy to the sponsor patron.

**Table 4-29. Proxy Patron Maintenance Dialog Box**

Field	Description
Created	Time, operator ID, and location at which this proxy patron was added to the “sponsor” patron’s list.

The procedure for creating a proxy patron is shown in [Procedure 4-41, Creating a Proxy Patron](#).



---

**Procedure 4-41. Creating a Proxy Patron**

---

Use the following to create a proxy patron:

In this example, Sarah Student will become a Proxy Patron for Paula Professor. Therefore, Sarah can go to the library and charge items out for Paula.

To add a proxy patron to a sponsor’s list of proxies, you must access the *sponsor’s* patron record.

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

Result: The **Patron Search** dialog box opens.

2. Search for the sponsor patron and display their patron record. In this example it is Paula Professor (see [Figure 4-105](#)).

Patron ID 245

Last: Professor

First: Paula

Middle:

Title: 0000000003

Name Type: Personal

Entered At: Circulation Desk

0

\$0.00

0/0

0

9452  
8146  
6987

Patron Id

Details

Address/Phone

Counters

Proxy Patrons

History

Barcode	Patron Group	Status/Date	Operator Id
454545	Faculty	Expired - 10/12/2010	demo

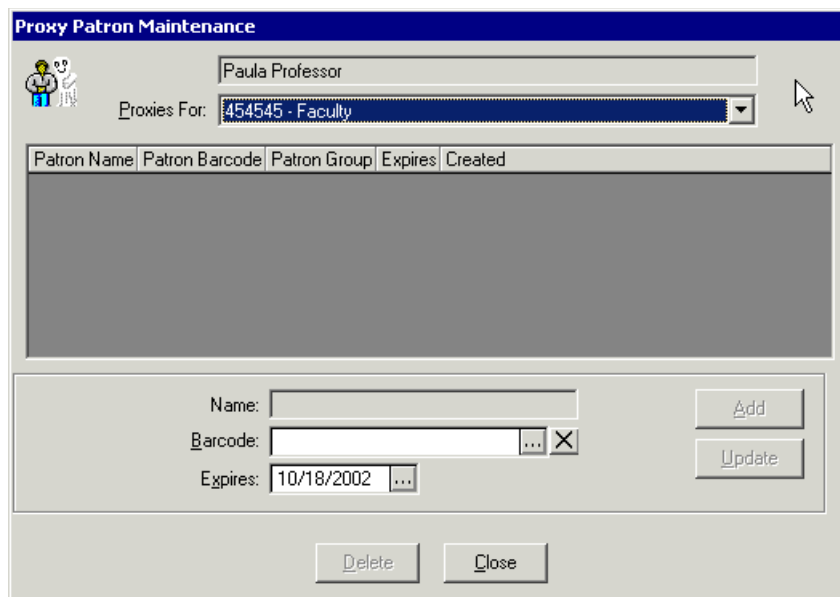
Institution Id:

SSN: 545454545

Figure 4-105. Sponsor Patron’s Patron Record

- 3. Access the **Proxy Patron Maintenance** dialog box by selecting **Proxy Patron** from the **Patron** menu.

Result: The **Proxy Patron Maintenance** dialog box opens (see [Figure 4-106](#)). This dialog box lists of all of the patrons who are proxies for the sponsor patron who owns the list.



The dialog box is titled "Proxy Patron Maintenance". It features a header bar with a blue gradient. Below the header, there is a text field containing "Paula Professor" and a dropdown menu labeled "Proxies For:" with "454545 - Faculty" selected. A table with five columns (Patron Name, Patron Barcode, Patron Group, Expires, Created) is shown below, but it is empty. At the bottom, there are three input fields: "Name:" (empty), "Barcode:" (empty with an ellipsis button), and "Expires:" (containing "10/18/2002" with an ellipsis button). To the right of these fields are "Add" and "Update" buttons. At the very bottom are "Delete" and "Close" buttons.

---

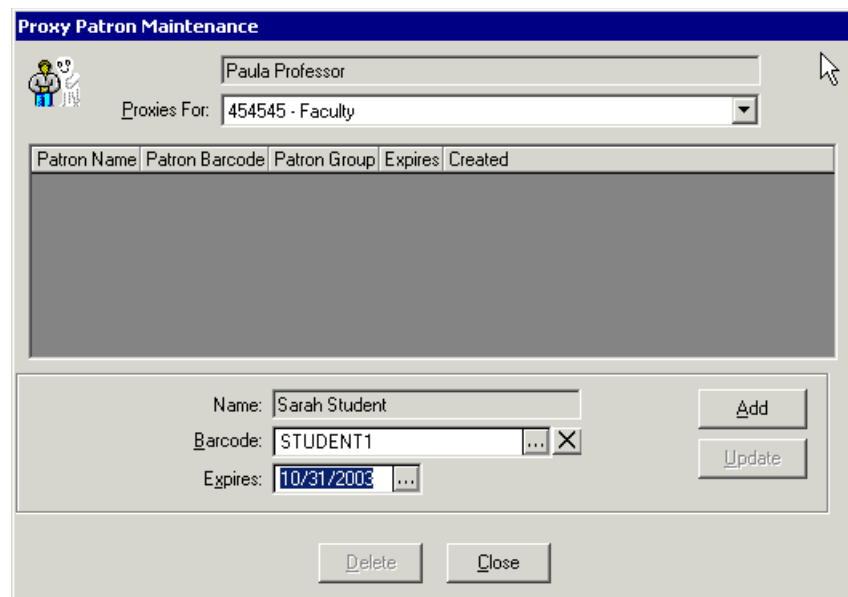
**Figure 4-106. Proxy Patron Dialog Box**

4. To add a new proxy, enter the barcode of the patron to be added to the proxy list (the proxy patron, Sarah Student) in the **Barcode** field or click the ellipsis button to search for a patron.

Result: The name of the proxy patron displays in the **Name** field.

5. Enter the date that you want the patron's status as a proxy to expire in the **Expiration Date** field (see [Figure 4-107](#)).





The image shows a 'Proxy Patron Maintenance' dialog box. At the top, there is a title bar with the text 'Proxy Patron Maintenance'. Below the title bar, on the left, is a small icon of a person. To the right of the icon is a text field containing 'Paula Professor'. Below this, there is a label 'Proxies For:' followed by a dropdown menu showing '454545 - Faculty'. In the center, there is a table with the following headers: 'Patron Name', 'Patron Barcode', 'Patron Group', 'Expires', and 'Created'. The table body is empty. At the bottom of the dialog box, there are three input fields: 'Name:' with the value 'Sarah Student', 'Barcode:' with the value 'STUDENT1', and 'Expires:' with the value '10/31/2003'. To the right of these fields are three buttons: 'Add', 'Update', and 'Delete'. At the bottom right, there is a 'Close' button.

Patron Name	Patron Barcode	Patron Group	Expires	Created
-------------	----------------	--------------	---------	---------

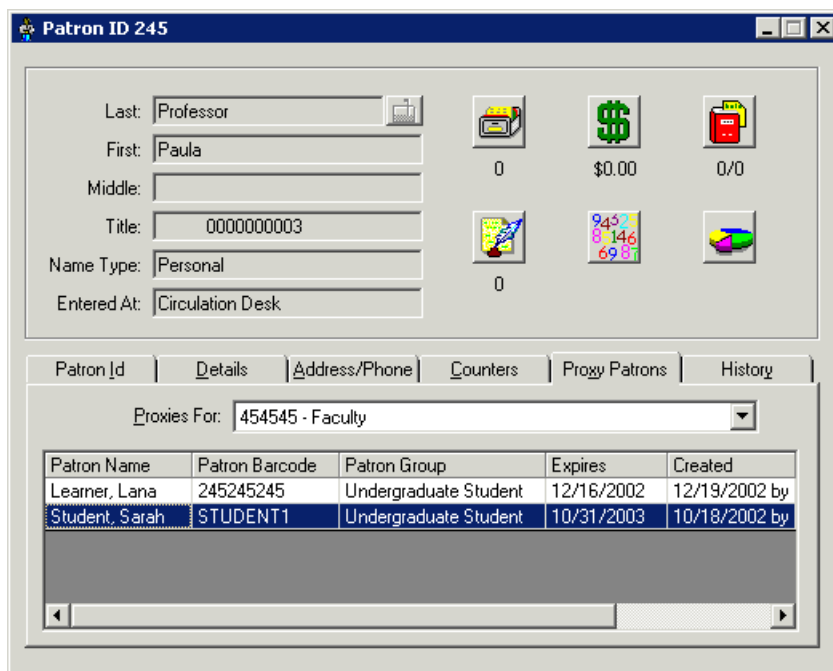
Name: Sarah Student  
Barcode: STUDENT1  
Expires: 10/31/2003

Buttons: Add, Update, Delete, Close

**Figure 4-107. Example of Completing the Fields on the Proxy Patron Maintenance Dialog Box**

6. Click the **Add** button to add the proxy patron to the proxy list and then click the **Close** button to save your changes and close the dialog box.

Result: The proxy patron is added and is seen on the **Proxy Patron** tab of the sponsor patron's patron record as shown in [Figure 4-108](#)).



Patron ID 245

Last: Professor  
First: Paula  
Middle:  
Title: 0000000003  
Name Type: Personal  
Entered At: Circulation Desk

0 \$0.00 0/0  
0 945 8 146 69 87

Patron Id Details Address/Phone Counters Proxy Patrons History

Proxies For: 454545 - Faculty

Patron Name	Patron Barcode	Patron Group	Expires	Created
Learner, Lana	245245245	Undergraduate Student	12/16/2002	12/19/2002 by
Student, Sarah	STUDENT1	Undergraduate Student	10/31/2003	10/18/2002 by

Figure 4-108. Proxy Patron Tab

## Updating Proxy Patrons

In the **Proxy Patron Maintenance** dialog box, you can change the expiration date of a proxy patron. Only the date may be added, changed, or deleted.

The procedure for updating a proxy patron is shown in [Procedure 4-42, Updating Proxy Patrons](#).



### Procedure 4-42. Updating Proxy Patrons

Use the following to update proxy patrons:

1. From the sponsor's patron record, select **Proxy Patron** from the **Patron** menu.

Result: The **Proxy Patron Maintenance** dialog box opens.

2. Select a patron on the list in the dialog box.
3. Enter a new expiration date in the **Expiration Date** field or clear the old one.
4. Click the **Update** button.

Result: The new expiration date is added to the proxy patron information.

5. Click **Close** to save your changes and close the dialog box.
- 

### Deleting Proxy Patrons

If a patron is no longer a proxy for a sponsor patron, you can remove the proxy privilege by deleting the proxy patron from the Proxy Patrons list of the sponsor.

Patrons who are deleted from this list are not deleted entirely, that is, from the patron database, but are simply removed from this proxy list. A deleted proxy patron may be re-added to the list in the same way a regular proxy is added for the first time.

#### NOTE:

If a proxy patron's actual patron record is deleted (from the patron database, while still on a proxy list), the patron is also deleted from any sponsor patron record on which he is listed.

The procedure for deleting a proxy patron is shown in [Procedure 4-43, Deleting Proxy Patrons](#).



### Procedure 4-43. Deleting Proxy Patrons

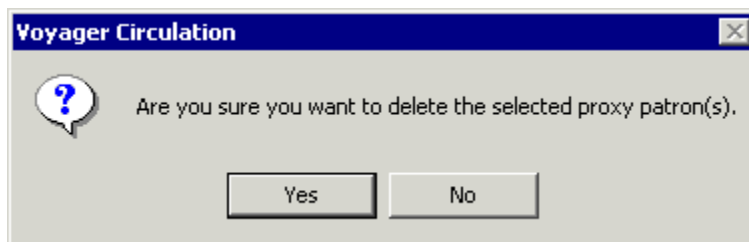
---

Use the following to delete proxy patrons:

1. From the sponsor's patron record, select **Proxy Patron** from the **Patron** menu.

Result: The **Proxy Patron Maintenance** dialog box opens.

2. Select a patron on the list in the dialog box.
3. Click the **Delete** button.
4. You are prompted to confirm the delete action (see [Figure 4-109](#)).



---

**Figure 4-109. Deleting a Proxy Patron Confirmation Message**

5. Click **Yes** to remove the patron from the list. Otherwise, click **No** to stop the delete action and return to the **Proxy Patron Maintenance** dialog box.

Result: If you clicked **Yes**, the changes are made.

---

## **Clearing Patron Display**

---

If a patron record is loaded, operators may clear the display by selecting **Clear Patron Display** from the **Patron** menu (or right-click and select the same command from the submenu).

## **E-mailing from the Circulation Module**

---

Operators can send e-mail to patrons, which have an active e-mail address, from the following areas within the Circulation module:

- **Patron Record** dialog box
- **Charge** dialog box
- **Charged to** dialog box, accessed from the **Item** dialog box
- **Charged to** dialog box, accessed from the **Course Reserve** dialog box

Operators may e-mail patrons from the Circulation module, even if the **Hold Mail** check box is selected in their patron record (that is when Circulation notices are not e-mailed).

### **NOTE:**

E-mail can be sent to remote patrons as well, as long as they have an active e-mail address in their stub patron record or child patron record.

## E-mailing from the Patron Record

When an operator accesses a Patron Record with an active e-mail address, the record displays with an active **E-mail control** button (see [Figure 4-110](#)).

Patron ID 58

Last: Angelaccio  
First: Cheryl  
Middle:  
Title:  
Name Type: Personal  
Entered At:

1  
\$2.50  
0/0  
0  
945  
146  
69  
8

**Figure 4-110. E-mail Control Button on the Patron Record**

The procedure for e-mailing from a patron record is shown in [Procedure 4-44, E-mailing from the Patron Record](#).



### Procedure 4-44. E-mailing from the Patron Record

Use the following to e-mail a patron from their patron record:

1. After logging in to the Circulation module, click the **Patron** button from the Circulation toolbar or select **Patron** from the **Functions** menu.

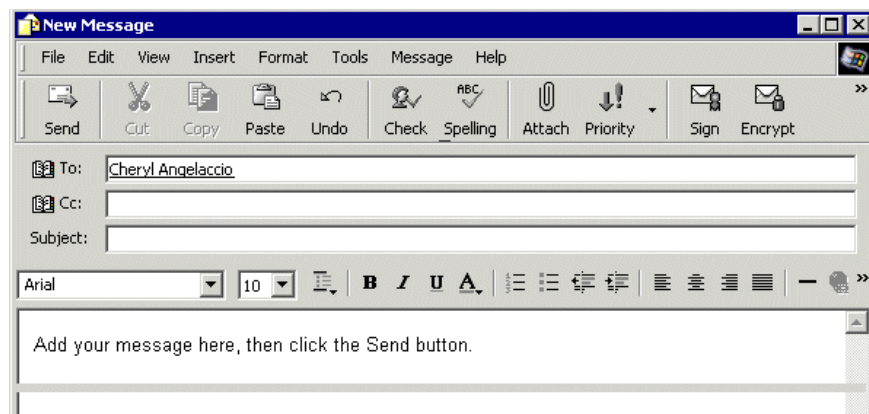
Result: The **Patron Search** dialog box opens.

2. Search for and display a patron record. See [Searching for a Patron Record on page 3-2](#).

Result: The **Patron Record** opens.

3. Click the **E-mail control** button.

Result: An e-mail message box opens with the recipient name entered (see [Figure 4-111](#)).



**Figure 4-111. E-mail Message to Send to Patron**

4. Enter the message and click the **Send** button.

Result: The message is sent, and the **Patron Record** dialog box displays.

---

## E-mailing from the Charge Workspace

---

When you access the **Charge** workspace and enter the patron information, the **Charge** workspace contains an active **E-mail control** button (next to Name field) if the patron has an active e-mail address (see [Figure 4-112](#)).



**Figure 4-112. Active E-mail Address/Button**

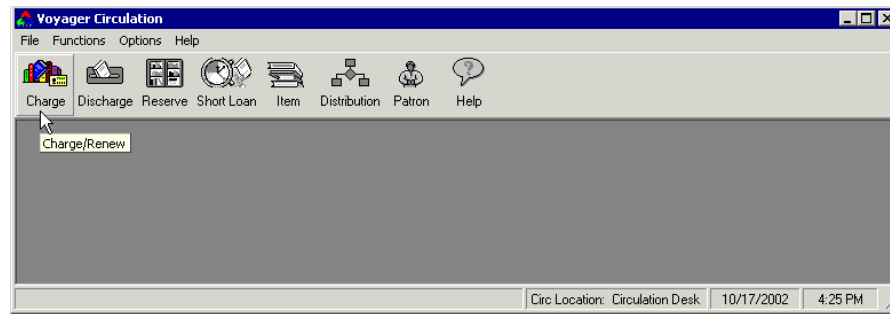
The procedure for e-mailing from the **Charge** workspace is shown in [Procedure 4-45, E-mailing from the Charge Workspace](#).



#### Procedure 4-45. E-mailing from the Charge Workspace

Use the following to e-mail a patron from the **Charge** workspace:

1. After logging in to the Circulation module, click the **Charge** button ([Figure 4-113](#)) from the Circulation toolbar or select **Charge/Renew** from the **Functions** menu.



**Figure 4-113. Charge Button**

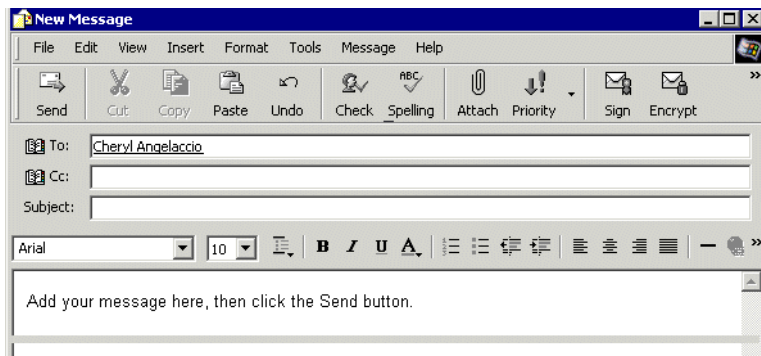
Result: The **Charge** workspace opens.

2. Perform one of the following to submit Patron information:
  - a. Enter the patron's barcode in to the **Barcode** field and click **Enter**.
  - b. Scan the patron's barcode in to the **Barcode** field.
  - c. Click the ellipses button which opens the **Patron Search** dialog box, or select **Patron> Search for Patron** from the **Charge/Renew** menu, and then search for a patron by Name, Institution ID or Social Security Number.

Result: The patron's information populates the fields in the **Patron** section of the **Charge** workspace.

3. Click the **E-mail control** button.

Result: An e-mail message box opens with the recipient name entered (see [Figure 4-114](#)).



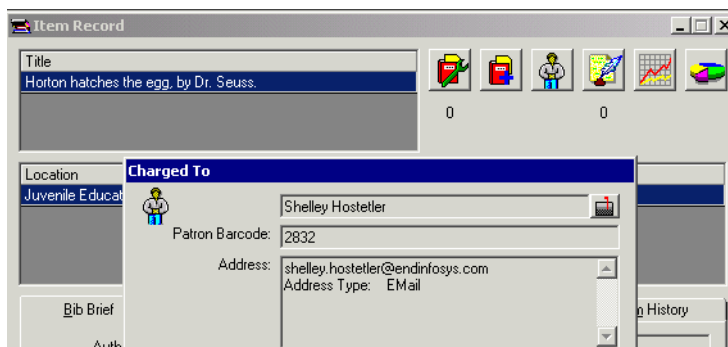
**Figure 4-114. E-mail Message to Send to Patron**

4. Enter the message and click the **Send** button.

Result: The message is sent and returns to the **Charge** dialog box.

### E-mailing from the Charged To Dialog Box of a Charged Item

When an operator accesses the **Charged to** dialog box from the Item record of a charged item, an active **E-mail control** button is next to the name of the patron who has the item charged if that patron has an active e-mail address in his or her patron record (see [Figure 4-115](#)).



**Figure 4-115. E-mail Control Button on the Charged to Dialog Box**



The procedure for e-mailing from the **Charged to** dialog box is shown in [Procedure 4-46, E-mailing from the Charged To Dialog Box](#).



---

**Procedure 4-46. E-mailing from the Charged To Dialog Box**

---

Use the following to e-mail a patron from the **Charged To** dialog box:

1. Search for and display an item record [Searching for an Item](#) on [page 3-11](#).
2. Select **Charged To** from the **Item** menu or click the **Charged To** button.
3. The **Charged To** dialog box opens (see [Figure 4-115](#)).
4. Click the **E-mail control** button.

Result: An e-mail message box opens with the recipient name entered.

5. Enter the message and click the **Send** button.

Result: The message is sent and returns to the **Charged to** dialog box.

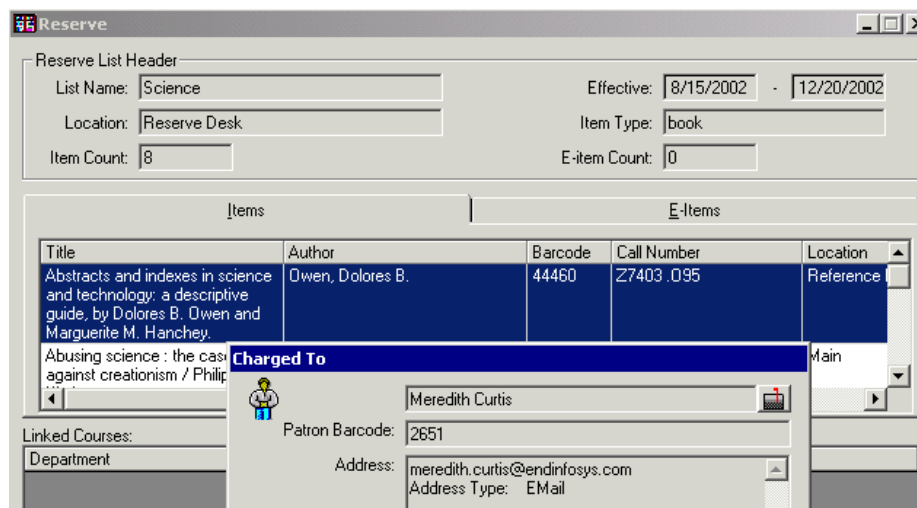
---

---

**E-mailing from the Charged to Dialog Box of a Charged Reserve Item**

---

If a patron has an active e-mail address assigned in the patron record, an active **E-mail control** button appears next to the name of the patron on the **Charged to** dialog box of a charged reserve item from the **Reserve** dialog box (see [Figure 4-116](#)).



The screenshot shows a 'Reserve' dialog box with the following fields:

- Reserve List Header:
  - List Name: Science
  - Effective: 8/15/2002 - 12/20/2002
  - Location: Reserve Desk
  - Item Type: book
  - Item Count: 8
  - E-item Count: 0
- Items and E-Items table:

Title	Author	Barcode	Call Number	Location
Abstracts and indexes in science and technology: a descriptive guide, by Dolores B. Owen and Marguerite M. Hanchey.	Owen, Dolores B.	44460	Z7403 .095	Reference
Abusing science : the case against creationism / Philip				Main
- Linked Courses:
  - Department
- Charged To dialog box (open):
  - Patron: Meredith Curtis
  - Patron Barcode: 2651
  - Address: meredith.curtis@endinfosys.com
  - Address Type: EMail

---

**Figure 4-116. E-mail Control Button on the Charged to Dialog Box**

The procedure for e-mailing from the **Charged to** dialog box of a reserve item is shown in [Procedure 4-47, E-mailing from the Charged to Dialog Box](#).



---

#### **Procedure 4-47. E-mailing from the Charged to Dialog Box**

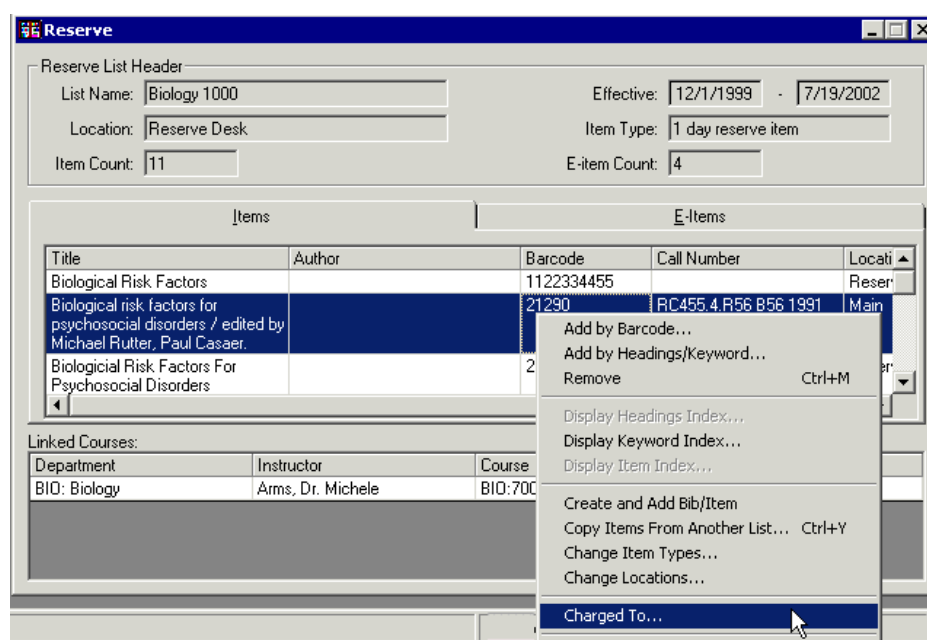
---

Use the following to e-mail a patron from the **Charged to** dialog box:

1. Search for and display a reserve list [Searching for a Course Reserve List](#) on [page 8-12](#).

Result: The list displays.

2. Select an item and right-click to access the **Charged To** command (see [Figure 4-117](#)).



**Figure 4-117. Accessing the Charged To Dialog Box**

3. Select **Charged To**

Result: The **Charged To** dialog box opens.

4. Click the **E-mail control** button.

Result: An e-mail message box opens with the recipient name entered.

5. Enter the message and click the **Send** button.

Result: The message is sent and returns to the **Charged to** dialog box.

6. Click the **E-mail control** button.

Result: An e-mail message box opens with the recipient name entered.

7. Enter the message and click the **Send** button.

Result: The message is sent and returns to the **Charged To** dialog box.



---

**Introduction**

Voyager item records include information about an item's permanent and temporary location, and the item's permanent and temporary type. This information, along with the item's barcode, is used for circulation transactions. The copy number, enumeration, and chronology fields in an item record are used to augment the WebVoyage display when the item is charged out. The item record is also used for placing and maintaining patron requests such as holds and recalls.

---

**Purpose of This Chapter**

This chapter discusses the following:

- contents of the item record
- viewing the circulation history of an item
- viewing the outstanding fines of an item
- adding bibliographic, holdings, and item records in Circulation (on-the-fly)
- `Circbib.cfg` file
- adding, editing, and deleting item records
- requests in the Circulation module
- OPAC call slip messages

## The Item Record

An Item Record ([Figure 5-1](#)) contains a variety of information about the item. This information is accessed from the following sections:

- Header and middle information
- Tabs to access additional item information
- Buttons to access and add additional item information

The screenshot shows a window titled "Item Record". At the top, there is a text field for "Title" containing "Journal of abnormal psychology.". To the right of the title field are several icons: a red folder with a checkmark, a red folder, a person icon, a magnifying glass, a bar chart, and a pie chart. Below the title field is a table with the following columns: Location, Item Type, Item Status, Enum, Chron, Copy, and Barcode. The table contains four rows of data. Below the table are five tabs: Bib Brief, Holdings, Item/Holdings, Item Details, and Item History. The Item Details tab is selected, showing a form with fields for Author, Edition, Publisher, Pub. No., ISSN, ISBN, Place/Date, Series, System No., LCCN, and Owning Library.

	Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
1	Main	Book	Not Charged			1	67594
2	Main	Book	Not Charged	v. 1, no. 5	2005	1	65161
3	Acquisitions	Book	Not Charged	no. 3	2008	1	15151
4	Acquisitions	Book	Not Charged	v. 3, no. 4 special issue	2007	1	

**Item Details**

Author:

Edition:

Publisher:  Place/Date:

Pub. No.:  Series:

ISSN:  System No.:

ISBN:  LCCN:

Owning Library:

**Figure 5-1. Item Record**





Since item records are not MARC records, they use and display the Latin-1 character set.

[Table 5-1](#) describes the Item record.



**Table 5-1. Item Record**

Field Name	Description
Title	Title of the item. Occasionally, the author is listed as well.

Table 5-1. Item Record

Field Name	Description
Location	Location of the item. The information in this middle section corresponds to the MFHD that is selected on the Holdings tab.
Item type	Type of Item, for example a book. Item types are defined in the System Administration module. See <i>Item Types</i> in the <i>Voyager System Administration User's Guide</i> for more information.
Item status	Status of the item.
Enumeration	Descriptive caption, numbering, and value scheme (for example, Volume, Roman and IV).
Chronology	Descriptive format and value scheme (for example Spring 1995).
Copy	Item's copy number.
Barcode	Item's barcode.
Request Maintenance button 	<p>Opens the Request Maintenance dialog box (see <a href="#">Request Maintenance Dialog Box</a> on <a href="#">page 5-86</a>).</p> <p>It provides information on any pending requests. The number beneath the button indicates the number of pending requests.</p>
Place Request button 	<p>Opens the Place Request dialog box (see <a href="#">Place Request Dialog Box</a> on <a href="#">page 5-79</a>), where a request for this item may be made.</p>
Charged to button 	<p>Opens the Charged to dialog box if the item is currently charged.(see <a href="#">Charged To Dialog Box</a> on <a href="#">page 5-11</a>).</p> <p>It provides information on the patron who currently has the item.</p> <p>If the item is not charged out to a patron a message stating the item is not charged displays.</p>
Notes button 	<p>Opens the Notes dialog box (see <a href="#">Notes Dialog Box</a> on <a href="#">page 5-12</a>).</p> <p>Operators can add a note to this item record if wanted.</p> <p>The number under the button indicates the number of notes associated with this item record.</p>

**Table 5-1. Item Record**

Field Name	Description
Status button 	Opens the Items Status dialog box (see <a href="#">Item Status Dialog Box</a> on <a href="#">page 5-19</a> ). Operators can add statuses to this item if wanted.
Statistics button 	Opens the Item Statistical Categories dialog box (see <a href="#">Item Statistical Categories Dialog Box</a> on <a href="#">page 5-15</a> ). Operators can add statistical categories to this item record if wanted.
Bib Brief	The Bib Brief tab includes brief bibliographic information from the bibliographic record to which the item record is attached. See <a href="#">Bib Brief Tab</a> on <a href="#">page 5-5</a> .
Holdings	The Holdings tab includes holdings information from the holdings record to which the item record is attached. See <a href="#">Holdings Tab</a> on <a href="#">page 5-6</a> .
Item/Holdings	The Item/Holdings tab includes both holdings and item record information. The holdings information comes from the holdings record to which the item record is attached. The item record information comes from the item record itself. See <a href="#">Item/Holdings Tab</a> on <a href="#">page 5-7</a> .
Item Details	The Item Details tab includes additional information from the item record. See <a href="#">Item Details Tab</a> on <a href="#">page 5-8</a> .
Item History	The Item History tab includes counter information for the item as well as update and create information. See <a href="#">Item History Tab</a> on <a href="#">page 5-9</a> .

**NOTE:**

To facilitate easier identification and access to relevant information, operators can sort all display columns in Voyager Circulation. A simple click of the column header, for example, Barcode, organizes the display in ascending or descending sort order by barcode; a second click the same column header reverses the sort by barcode.

---

**Sorting Items by Column Headings**

The Item Record allows you to sort the items in the list alphabetically by clicking a particular column heading (such as Barcode). The first time a column heading is clicked, the system will sort the items in ascending order. If that same column heading is clicked again, the system will sort the items in descending order. By default, the items are sorted by the item sequence, which is indicated by the first column on the left.



For example, if you click the Barcode column heading, the system will sort the items in ascending order based on the barcode values:

**Item Record**

Title: Journal of abnormal psychology.

Item Sequence: 0

	Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
4	Acquisitions	Book	Not Charged	v. 3, no. 4 special issue 1232323452	2007	1	
5	Acquisitions	Book	Not Charged	v. 3, no. 9	2007	1	
3	Acquisitions	Book	Not Charged	no. 3	2008	1	15151

**Bib Brief** | Holdings | Item/Holdings | Item Details | Item History

Author:

Edition:

Publisher: American Psychological Association. Place/Date: [Washington] 1965

Pub. No.:  Series:

ISSN: 0021-843X System No.: 1039412 277900

ISBN:  LCCN: sc 78001446

Owning Library: Training Master DB

**Figure 5-2. Using Column Headings to Sort the Item Record**

To sort the items in descending order, click the Barcode column heading again.

### **Bib Brief Tab**

The **Bib Brief** tab includes brief bibliographic information from the bibliographic record to which the item record is attached (see [Figure 5-3](#)).

---

Bib Brief	Holdings	Item/Holdings	Item Details	Item History
Author: Morrison, Toni.				
Edition: 1st ed.				
Publisher: Knopf : Distributed by Random House		Place/Date: New York : 1987		
Pub. No.:		Series:		
ISSN:		System No.: ocm15284982		
ISBN: 0394535979		LCCN: 86046157		
Owning Library: Training Master DB				

---

**Figure 5-3. Bib Brief Tab of an Item Record**

[Table 5-2](#) describes the **Bib Brief** tab.

**Table 5-2. Bib Brief tab**

Name	Description
Author	Creator of the item.
Edition	Version of the title.
Publisher	Name of the item's publisher.
Place/Date	Place and date of publication.
Pub. No	Publisher number.
Series	Name of a group of items that are related to each other. One item is considered part of the group or series.
ISSN	International Standard Serial Number.
System No.	Old system number (for example, an OCLC number) which populates the 035 field of a Voyager bib record when loaded into the database.
ISBN	International Standard Book Number.
LCCN	Library of Congress Card Number.
Owning Library	Library that owns this item.

## **Holdings Tab**

---

The **Holdings** tab includes holdings information from the holdings record to which the item record is attached (see [Figure 5-4](#)).

Holdings Records for the Current Bib				
Location Name	Call Number Type	Call Number		
Main	Library of Congress	PS3563.D8749 B4 1987		

**Figure 5-4. Holdings Tab of an Item Record**

[Table 5-3](#) describes the **Holdings** tab.

**Table 5-3. Holdings Tab**

Name	Description
Location Name	Location of the item. If it is the temporary location, the location name is preceded by a <T>.
Call Number Type	Description for the call number's identification methodology (for example Library of Congress).
Call Number	Item's identification number.

### **Item/Holdings Tab**

The **Item/Holdings** tab includes both holdings and item record information. The holdings information comes from the holdings record to which the item record is attached. The item record information comes from the item record itself (see [Figure 5-5](#)).

---

The screenshot shows a web interface with five tabs: Bib Brief, Holdings, Item/Holdings (selected), Item Details, and Item History. Below the tabs is a form with the following fields:

- Call No. Type: Library of Congress
- Location: Main
- Call No.: PS3563.08749 B4 1987
- Enumeration: (empty)
- Year: (empty)
- Chronology: (empty)
- Caption: (empty)
- FreeText: (empty)

---

**Figure 5-5. Item/Holdings Tab of an Item Record**

[Table 5-4](#) describes the **Items/Holdings** tab.

**Table 5-4. Items/Holdings Tab**

Name	Description
Call No. Type	Description for the call number's identification methodology (for example Library of Congress).
Location	Location of the item.
Call No.	Item's identification number.
Enumeration	Descriptive caption, numbering, and value scheme (for example, Volume, Roman and IV).
Year	Enumeration year (if serially published) or the publication year (if an individual item).
Chronology	Descriptive format and value scheme (for example Spring 1995).
Caption	Any additional title information.
Free Text	Free text field to enter additional item information.

---

### Item Details Tab

The **Item Details** tab includes additional information from the item record (see [Figure 5-6](#)).

**Figure 5-6. Item Details Tab of an Item Record**

[Table 5-5](#) describes the **Item Details** tab.

**Table 5-5. Item Details Tab**

Name	Description
Perm. Location	Item's permanent location.
Item Type	Item's type (for example, a book).
Temp. Location	Item's temporary location.
Temp. Item Type	Item's temporary type.
Media Type	Item's media type (for Media Scheduling only.)
Self Check Magnetic Media Sensitize	Status of Self Check item records flags.  If the check box is checked, the flag is set to Yes (Y) in the item record. When it is unchecked, the flag is set to No (N) in the item record.
Spine Label	Additional item information that displays on the spine label.
Pieces	Number of pieces that are associated with the item.
Price	Price of the item.

### Item History Tab

The **Item History** tab includes counter information for the item as well as update and create information (see [Figure 5-7](#)).

**NOTE:**  
Item History counters cannot be manually edited.

Bib Brief	Holdings	Item/Holdings	Item Details	Item History
Recalls Placed: <input type="text" value="0"/>	Historical Browsers: <input type="text" value="0"/>	Short Loan Charges: <input type="text" value="0"/>		
Holds Placed: <input type="text" value="0"/>	Historical Bookings: <input type="text" value="0"/>	Historical Reserve Charges: <input type="text" value="0"/>		
Historical Charges: <input type="text" value="0"/>	Reserve Charges: <input type="text" value="0"/>			
Created: <input type="text"/>	by: <input type="text"/>	at: <input type="text"/>		
Updated: <input type="text" value="1/16/1997"/>	by: <input type="text"/>	at: <input type="text"/>		
Last Transact.: <input type="text"/>				

**Figure 5-7. Item History Tab of an Item Record**

[Table 5-6](#) describes the **Item History** tab.

**Table 5-6. Item History Tab**

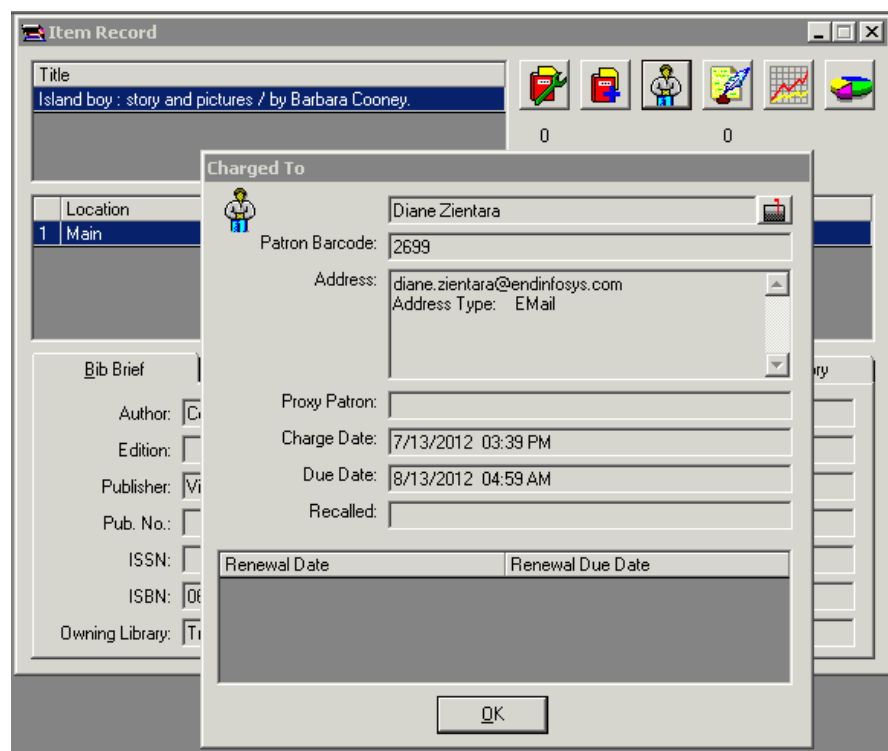
Name	Description
Recalls Placed	Current number of active recalls placed on the item.
Holds Placed	Current number of active holds placed on the item.
Historical Charges	Total number of times the item has been charged and discharged.
Historical Browsers	Total number of times the item has been discharged without a current charge transaction.
Historical Bookings	Total number of times the item has been booked in the Media Scheduling module.
Reserve Charges	Total number of times the item was charged and discharged while on reserve (current count). This count plus the Historical Reserve Charges count is the total for the item.
Short Loan Charges	Total number of times a short loan item has been charged and discharged.
Historical Reserve Charges	Total number of times the item was charged and discharged while the item was on past reserve lists. This count increments when the item is removed from reserve. This count plus the Reserve Charges count is the total for the item.

**Table 5-6. Item History Tab**

Name	Description
Created/by/at	Date the item was added, by whom, and the location of creation.
Updated/by/at	Date that the item was last updated, by whom, and the location of the last editing done on the item.
Last Transaction	Date for the last time the item was charged, discharged, or renewed.

### Charged To Dialog Box

The **Charged to** button opens the **Charged To** dialog box. It displays the name, barcode, and address of the patron to which the item was charged. In addition, the proxy patron (if initiated the charge), charge date, due date, and recall date display (see [Figure 5-8](#)).

**Figure 5-8. Charged To Dialog Box**

[Table 5-7](#) describes the fields in the **Charged To** dialog box.

**Table 5-7. The Charged To Dialog Box**

Field	Description
Patron Barcode	Patron's barcode (unique identifier).
Address	Patron's address.
Proxy Patron	Patron who initiated the charge.
Charge Date	Date the item was charged out.
Due Date	Date the item is due.
Recalled	If the item was recalled, the date the recall request was placed.
Renewal Date	If the item was renewed, the date the renewal request was placed.
Renewal Due Date	If the item was renewed, the new date the item is due.



---

#### **Procedure 5-1. Accessing Charged To Information**

---

Use the following to access the **Charged To** dialog box:

1. Search for and display an item record. See [Searching for an Item](#) on [page 3-11](#).
2. Select **Charged To** from the **Item** menu or click the **Charged To** button.

Result: The **Charged To** dialog box opens.

---

#### **Notes Dialog Box**

---

The **Notes** button opens the **Notes** dialog box where operators can view and add notes regarding an item (see [Figure 5-9](#)). This information does not display in WebVoyage, but certain notes may display to circulation desk staff at charge or discharge.



**Figure 5-9. Item Notes Dialog Box**

[Table 5-8](#) describes the fields in the **Notes** dialog box.

**Table 5-8. The Notes Dialog Box**

Field	Description
Barcode	Item's barcode (unique identifier).
Copy	Item's copy number.
Enumeration	Descriptive caption, numbering, and value scheme (for example, Volume, Roman and IV).
Chronology	Descriptive format and value scheme (for example Spring 1995).
Title	Title of the item.

**Table 5-8. The Notes Dialog Box**

Field	Description
Note Type	<p>The drop-down list displays the following type options:</p> <ul style="list-style-type: none"><li>• Regular</li><li>• Charge</li><li>• Discharge</li></ul> <p>Notes identified with the Charge or Discharge type display for the circulation clerk when an item is charged or discharged, respectively, and the alert for these is set in session preferences. See <a href="#">Alerts, Printing, and Fines/Fees/Demerits</a> on <a href="#">page 13-2</a>.</p>
Last Modified	Identifies the most recent date and time the item note was added or changed.

The procedure for working with item record notes is shown in [Procedure 5-2, Adding an Item Note](#).



---

**Procedure 5-2. Adding an Item Note**

---

Use the following to add an item note:

1. Click the **Item** icon or select **Functions > Item** from the toolbar menu and enter the item barcode.
2. Select **Notes** from the **Item** menu or click the **Notes** button.

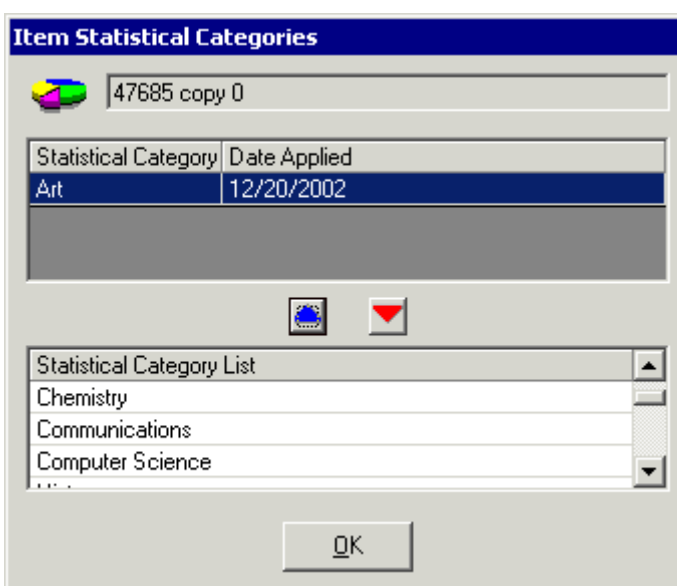
Result: The **Notes** dialog box opens.

3. Click the **New** button and enter your note text.
  4. Click the drop-down arrow to display the list of Note Type options and select the type.
  5. Click **Save** to store the note.
  6. Click **Close** to exit the **Notes** dialog box.
-

### Item Statistical Categories Dialog Box

The **Statistics** button opens the **Item Statistical Categories** dialog box where operators may apply and remove statistical categories to items (see [Figure 5-10](#)).

Item Statistical Categories are can be used to track the use of different types of items, such as Chemistry and Biology books.



**Figure 5-10. Item Statistical Category Dialog Box**

[Table 5-9](#) describes the **Item Statistical Categories** dialog box.

**Table 5-9. The Item Statistical Categories Dialog Box**

Field	Description
Header field	Unlabeled field containing the item barcode and copy number of the item.
Statistical Category	Any statistical categories currently applied to the item. <i>See Statistical Categories in the Voyager System Administration User's Guide for more information.</i>
Date Applied	Date the statistical category was applied.

**Table 5-9. The Item Statistical Categories Dialog Box**

Field	Description
Up button	Applies the selected statistical category from the Statistical Category List to the item.
Down button	Removes the selected statistical category from the item.
Statistical Category List	Statistical categories available to apply to the item.
OK button	Closes the dialog box.

The procedure for accessing the **Item Statistical Categories** dialog box is shown in [Procedure 5-3, Accessing the Item Statistical Categories Dialog Box](#).



---

**Procedure 5-3. Accessing the Item Statistical Categories Dialog Box**

---

Use the following to access the **Item Statistical Categories** dialog box:

1. Search for and display an item record. See [Searching for an Item](#) on [page 3-11](#).
2. Select **Statistical Categories** from the **Item** menu or click the **Statistics** button.

Result: The **Item Statistical Categories** dialog box opens.

---

The procedure for applying a statistical category to an item is shown in [Procedure 5-4, Applying a Statistical Category to an Item Record](#).



---

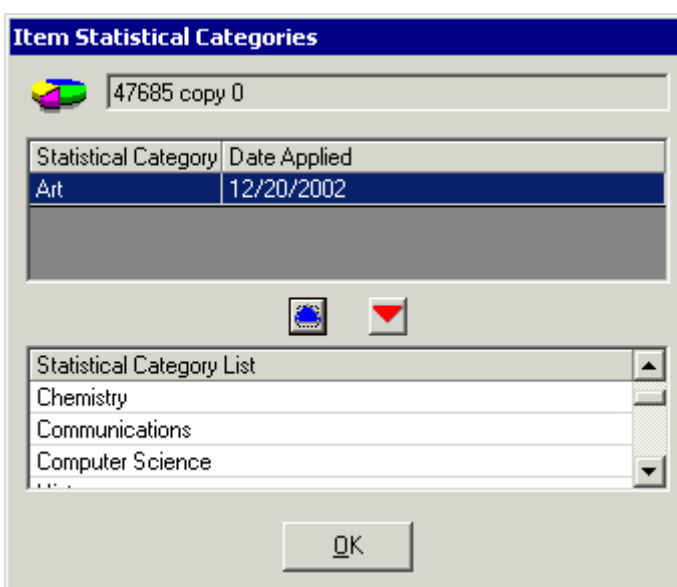
**Procedure 5-4. Applying a Statistical Category to an Item Record**

---

Use the following to apply a statistical category to an item:

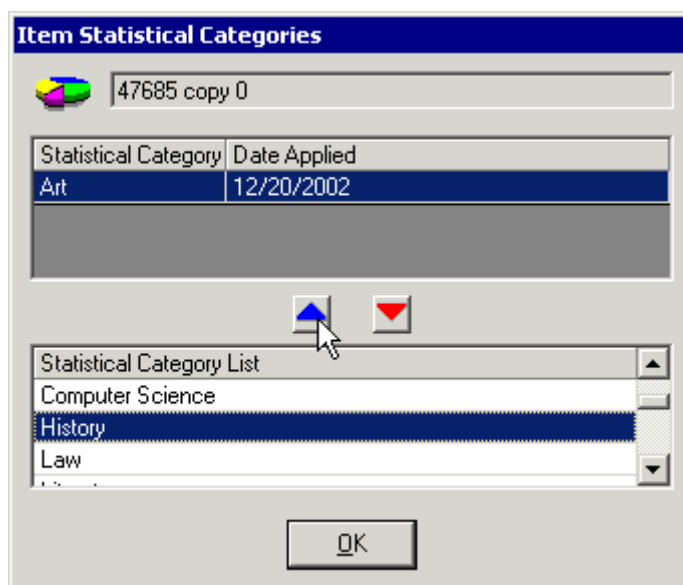
1. Search for and display an item record. See [Searching for an Item](#) on [page 3-11](#).
2. Select **Statistical Categories** from the **Item** menu or click the **Statistics** button.

Result: The **Item Statistical Categories** dialog box opens (see [Figure 5-11](#)).



**Figure 5-11. Item Statistical Categories Dialog Box**

3. Select the category you want to apply to the item record from the Statistical Category List in the lower list box and click the blue **up** arrow (or double-click the category).
4. In this example, the category of History is applied to this item. Select History and click the up arrow (see [Figure 5-12](#)).



---

**Figure 5-12. Adding the History Statistical Category**

Result: The statistical category is applied to the item.

5. Click the **OK** button to close the dialog box.

---

The procedure for removing a statistical category to an item is shown in [Procedure 5-5, Removing a Statistical Category from an Item Record](#).



---

#### **Procedure 5-5. Removing a Statistical Category from an Item Record**

---

Use the following to remove a statistical category from an item:

1. Search for and display an item record. See [Searching for an Item](#) on [page 3-11](#).
2. Select **Statistical Categories** from the **Item** menu or click the **Statistics** button.

Result: The **Item Statistical Categories** dialog box opens.

3. Select the statistical category you want to remove from the item record in the upper list box and click the red **down** arrow (or double-click the category).

Result: The statistical category is removed from the item.

4. Click the **OK** button to close the dialog box.

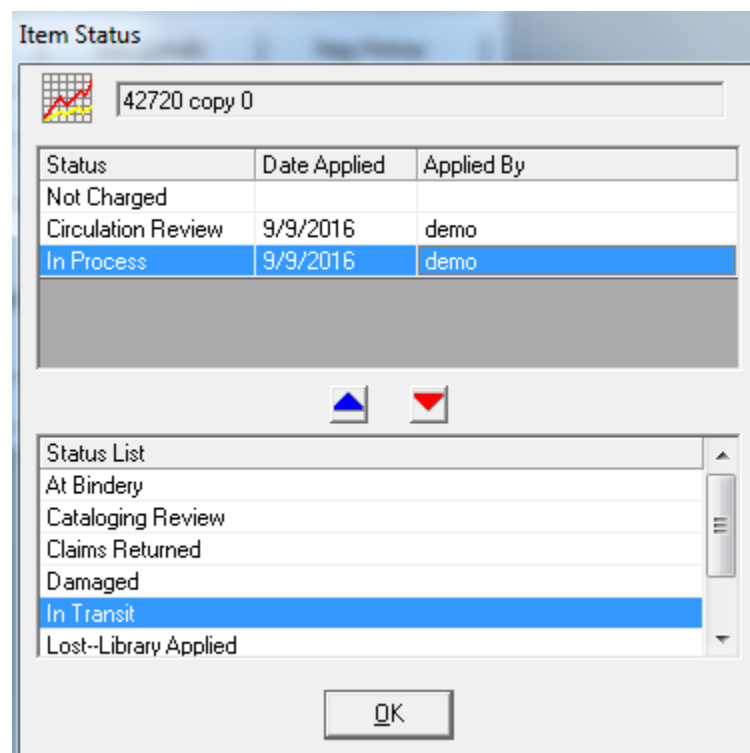
---

### Item Status Dialog Box

---

The **Status** button opens the **Item Status** dialog box where operators may apply a status to an item (see [Figure 5-13](#)). An item status describes the item's state of being.

---



---

**Figure 5-13. Item Status Dialog Box**

## List of Possible Item Statuses

[Table 5-10](#) contains a complete list of possible item statuses. Statuses are listed according to rank. A status is only viewed in the module if all of the other statuses currently applied to the item are below it in rank. Thus, a status higher on the list takes precedence over a status lower on the list.

**NOTE:**

An asterisk (\*) designates a status that may be assigned manually.

**Table 5-10. Item Statuses**

Status	Status Definition
Scheduled	Assigned automatically when the item has been scheduled by the Media Scheduling module.
*In Process	Assigned manually when the item's record is being reviewed, or some similar activity is being performed.
Lost - System Applied	The status is automatically assigned to overdue items that have not been returned within an interval defined by the library. The system does not calculate additional late fees once this status is given.
*Lost - Library Applied	The status is manually assigned to overdue items that have not been returned within an interval defined by the library. The system does not calculate additional late fees once this status is given.
*Missing	The item has been labeled missing according to other library policies. These are manually assigned only.
*At Bindery	The item has been sent to the bindery; manually assigned only.
Charged	Currently charged to a patron with a future due date.
Renewed	Currently charged to a patron for an additional period with a future due date.
Overdue	Currently charged to a patron with a past due date, but not yet lost.
On hold	An item is on a hold shelf waiting for the patron who placed a recall/hold request for the item.
*In Transit	An item is en route from one location to another.
In Transit Discharged	A courtesy discharge has taken place and the item is now on its way home.  See <a href="#">Tracking an In-Transit Item</a> for more information.



Table 5-10. Item Statuses

Status	Status Definition
In Transit on Hold	An item is en route to a hold shelf at a location selected by the requesting patron.  See <a href="#">Tracking an In-Transit Item</a> for more information
Recall Request	One or more patrons have placed a request for an item currently charged to another patron.  <b>NOTE:</b> A recall request can shorten the loan interval in effect.
Hold Request	One or more patrons have placed a request for an item that may or may not be currently charged to another patron.  <b>NOTE:</b> A hold request never effects the loan interval if the item is currently charged.
Short Loan Request	One or more patrons have placed a short loan request for an item.
Remote Storage Request	One or more patrons have placed a request for an item that is in a remote storage area.
Call Slip Request	One or more patrons have placed a call slip request for an item in a closed stacks area.
Discharged	An item has been discharged and is currently on the shelf or in its way there and is in effect until the expiration of the circ policy group shelving interval.
Not Charged	Should be on the shelf and is assigned after discharge and expiration of shelving interval for the applicable circ policy group.
*Catalog Review	The item has been marked for Cataloging review.
*Circulation Review	The item has been marked for Circulation review.
*Claims Returned	An item has not been discharged but the patron that charged the item asserts that the item was returned. This status is manually assigned. It only exists with other statuses and takes on the rank of the other status.

**Table 5-10. Item Statuses**

Status	Status Definition
*Damaged	The item has been damaged according to library policies. This status is manually assigned. It only exists with other statuses and takes on the rank of the other status.
*Withdrawn	The item has been withdrawn from the circulating collection. This status is manually assigned. It only exists with other statuses and takes on the rank of the other status.

Certain statuses do not effect circulation transactions although they may prompt the user to choose specific options such as to circulate damaged items.

[Table 5-11](#) describes the **Item Status** dialog box.

**Table 5-11. The Item Status Dialog Box**

Field	Description
Header field	Unlabeled field containing the item barcode and copy number of the item.
Status	Any status currently applied to the item.
Date Applied	Date the statistical category was applied.
Applied By	ID of the operator that applied the status.
Up button	Applies the selected statistical category from the Statistical Category List to the item.
Down button	Removes the selected statistical category from the item.
Status List	Statuses available to apply to the item.
OK button	Closes the dialog box.

The procedure for accessing the **Item status** dialog box is shown in [Procedure 5-6, Accessing the Item Status Dialog Box](#).



---

**Procedure 5-6. Accessing the Item Status Dialog Box**

---

Use the following to accessing the **Item status** dialog box:

1. Search for and display an item record. See [Searching for an Item](#) on [page 3-11](#).
2. Select **Status** from the **Item** menu or click the **Status** button.

Result: The **Item Status** dialog box opens.

The procedure for applying an item status is shown in [Procedure 5-7, Applying an Item Status to an Item Record](#).

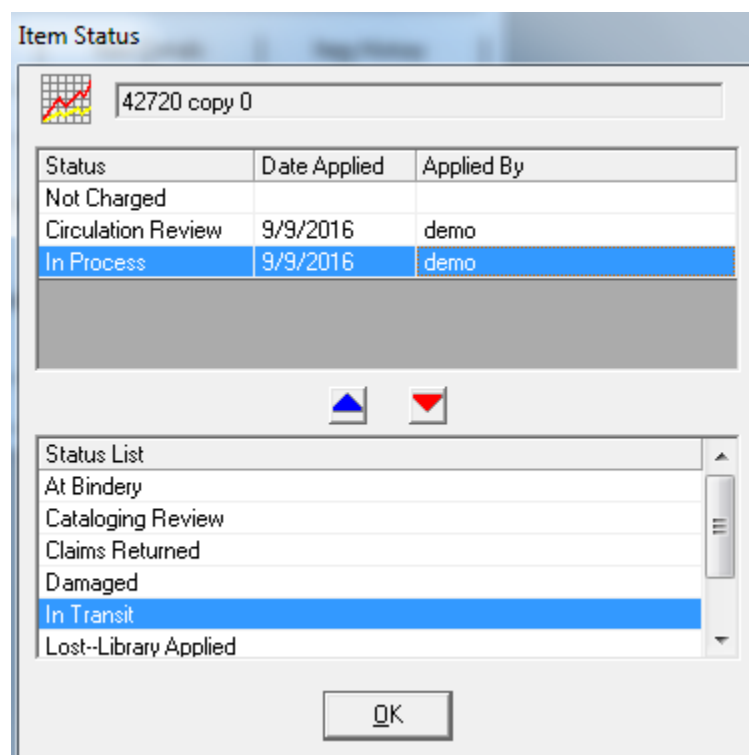


### Procedure 5-7. Applying an Item Status to an Item Record

Use the following to apply an item status to an item record:

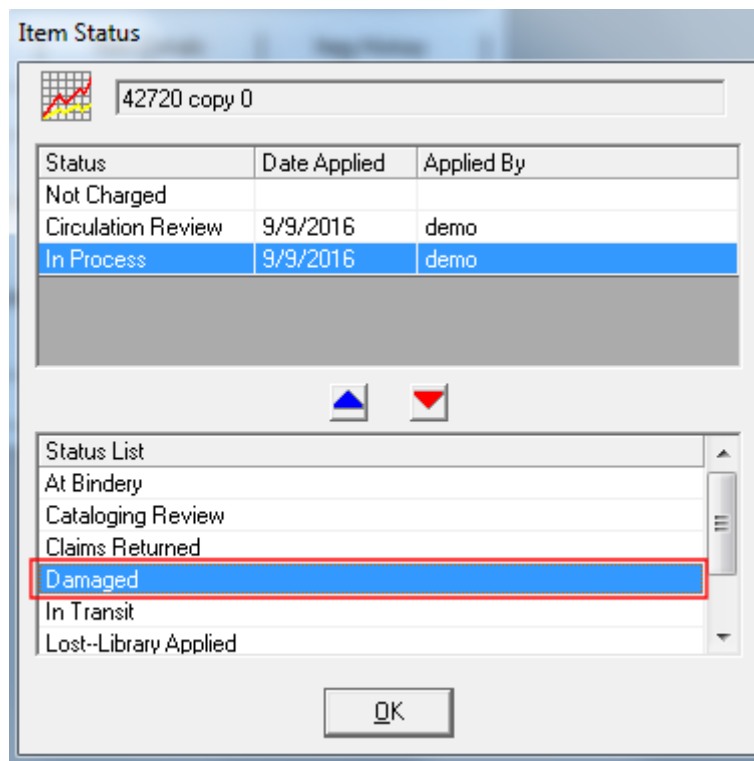
1. Search for and display an item record. See [Searching for an Item](#) on [page 3-11](#).
2. Select **Status** from the **Item** menu or click the **Status** button.

Result: The **Item Status** dialog box opens (see [Figure 5-14](#)).



**Figure 5-14. Item Status Dialog Box**

3. Select the status to apply to the item. In this example Cataloging Review is selected (see [Figure 5-15](#)).
- 



**Item Status**

42720 copy 0

Status	Date Applied	Applied By
Not Charged		
Circulation Review	9/9/2016	demo
In Process	9/9/2016	demo

▲ ▼

Status List

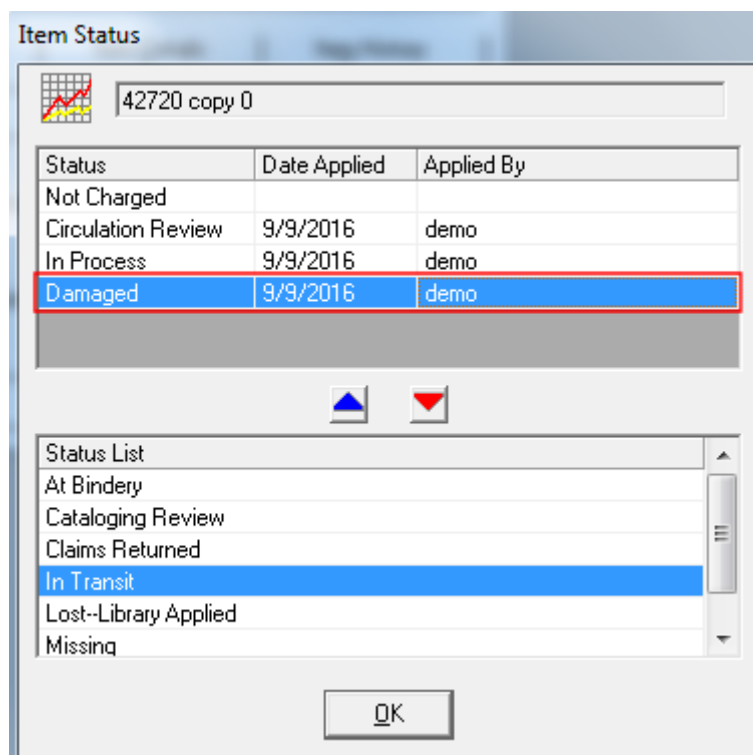
- At Bindery
- Cataloging Review
- Claims Returned
- Damaged**
- In Transit
- Lost-Library Applied

OK

---

**Figure 5-15. Cataloging Review Item Status Selected**

Result: The status is applied to the item (see [Figure 5-16](#)).



**Figure 5-16. Item Status Dialog Box with Statuses Applied**

4. Click **OK** to close the dialog box.

The procedure for removing an item status is shown in [Procedure 5-8, Removing an Item Status from an Item Record](#).



#### **Procedure 5-8. Removing an Item Status from an Item Record**

Use the following to remove an item status from an item record:

1. Search for and display an item record. See [Searching for an Item](#) on [page 3-11](#).
2. Select **Status** from the **Item** menu or click the **Status** button.

Result: The **Item Status** dialog box opens.

3. Select the status you want to remove from the item record in the upper list box and click the red **down** arrow (or double-click the category).

Result: The status is removed from the item.

4. Click the **OK** button to close the dialog box.
- 

### **Assigning a New Barcode to an Item Record**

---

Users can add a new barcode to an existing item record and delete inactive barcodes.

The procedure for assigning a new barcode to an item record is shown in [Procedure 5-9, Assigning a New Barcode to an Item Record](#).



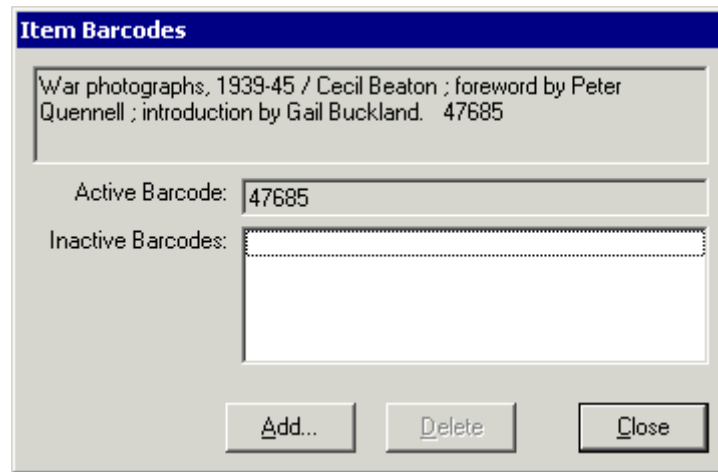
#### **Procedure 5-9. Assigning a New Barcode to an Item Record**

---

Use the following to assign a new barcode:

1. Search for and display an item record. See [Searching for an Item](#) on [page 3-11](#).
2. Select **Barcodes** from the **Item** menu.

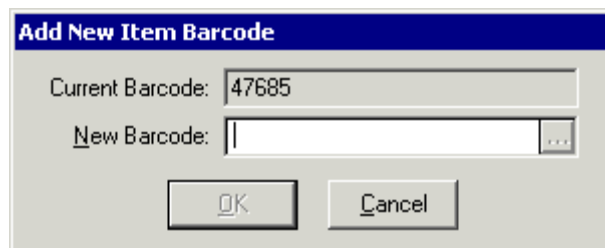
Result: The **Item Barcodes** dialog box opens (see [Figure 5-17](#)).



**Figure 5-17. Item Barcodes Dialog Box**

3. Click **Add** to add another barcode.

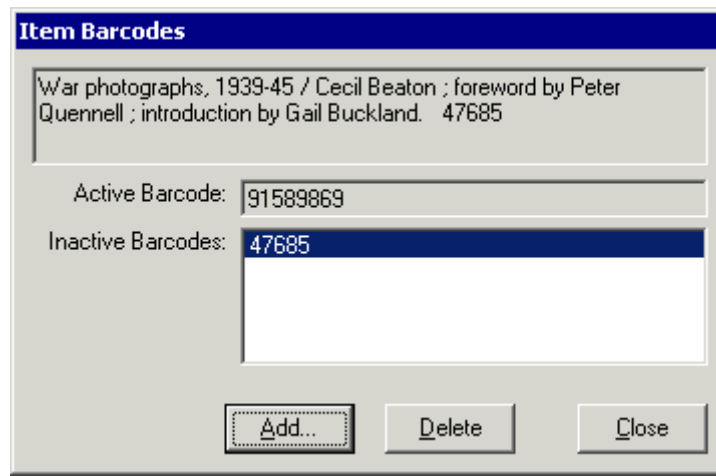
Result: The **Add New Item Barcode** dialog box opens (see [Figure 5-18](#)).



**Figure 5-18. Add New Item Barcode Dialog Box**

4. Enter the new barcode and click **OK**.

Result: The current barcode becomes inactive and the new barcode becomes the Active barcode (see [Figure 5-19](#)).



**Figure 5-19. Item Barcodes Dialog Box with New Active Barcode**

5. Click the **Close** button to close the **Add New Item Barcode** dialog box without saving any changes.

**NOTE:**

You can delete a barcode once it becomes inactive.

6. Select the barcode in the **Inactive Barcodes** field of the **Item Barcodes** dialog box and click the **Delete** button.

Result: It is immediately removed (see [Figure 5-20](#)).



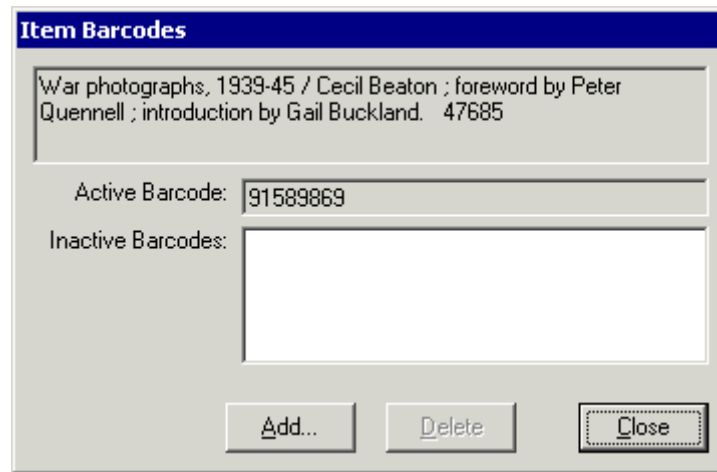


Figure 5-20. Item Barcodes Dialog Box with Deleted Inactive Barcode

7. Click **Close** to close the **Item Barcodes** dialog box.

## Copying Barcodes from the Item Record

The Copy Barcode function enables the user to extract the barcode from the selected record on the Item Record dialog box and place it on the clipboard. To copy an item barcode, use any of the following methods:

- Type the control sequence (**Ctrl + Y**).
- Select **Copy Barcode** from the **Item** menu.
- Select **Copy Barcode** from the right-click menu of the Item Record dialog box.
- Type the accelerator key (**Alt + i, y**)

From the Charge and Discharge workspaces, the user may place the barcode directly into the Item Barcode field by typing **Ctrl + A**. For other pasting methods, see [Pasting Barcodes into the Charge Workspace](#) and [Pasting Barcodes into the Discharge Workspace](#).

### NOTE:

Since the clipboard only holds one piece of data, subsequent copies by any copy command that places data on the clipboard (such as **Ctrl + C**) overwrites the data.

## Viewing an Item's Circulation History

---

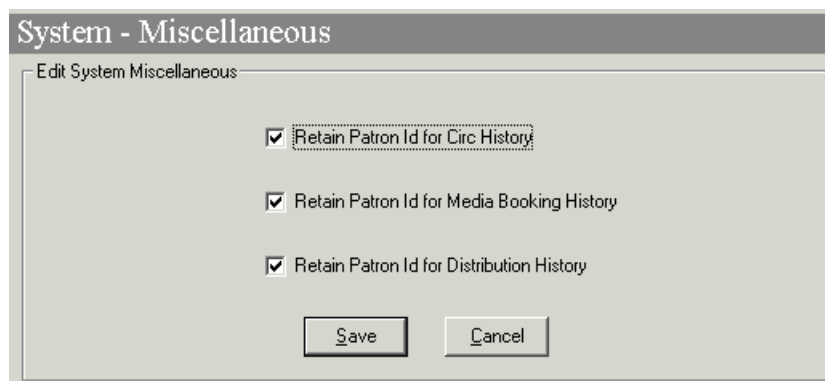
Operators with the appropriate security can view which patrons have borrowed a particular item in the **Item Circulation History** dialog box. See the *Voyager System Administration User's Guide* for information about the **View Patron Info in Item Circulation History** check box in *Circulation Profiles - Creating, Editing, and Deleting*.

If wanted, libraries can define all, none, or a specific number of patrons whose identifying information they want to retain (using Circulation batch job, Retain Patron ID, Circjob 38) for an item's circulation history. See the *Voyager Technical User's Guide* for more information.

### NOTE:

The circulation history of a item only displays if the **Retain Patron ID for Circ History** check box has been selected in System Administration module (see [Figure 5-21](#)). See *Miscellaneous* in the *Voyager System Administration User's Guide* for information on this check box.

---

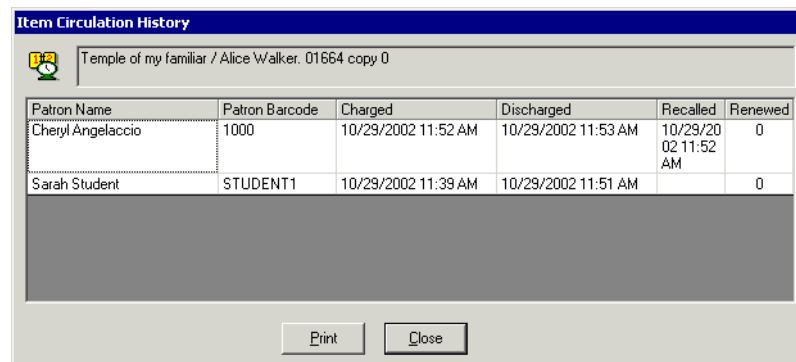


---

**Figure 5-21. Retain Patron ID for Circ History Check Box**

This history is not retroactive, that is, only circulation transactions that have occurred after the **Retain Patron ID for Circ History** option has been selected display. Previous transactions do not display. Also, it does not contain information about any currently charged items, only discharged items.

[Figure 5-22](#) displays the **View Circulation History** dialog box. The information in the dialog box includes the name of the patron checking out the item, dates checked in and out, and how many recalls and renewals were performed.



**Figure 5-22. View Circulation History Dialog Box**

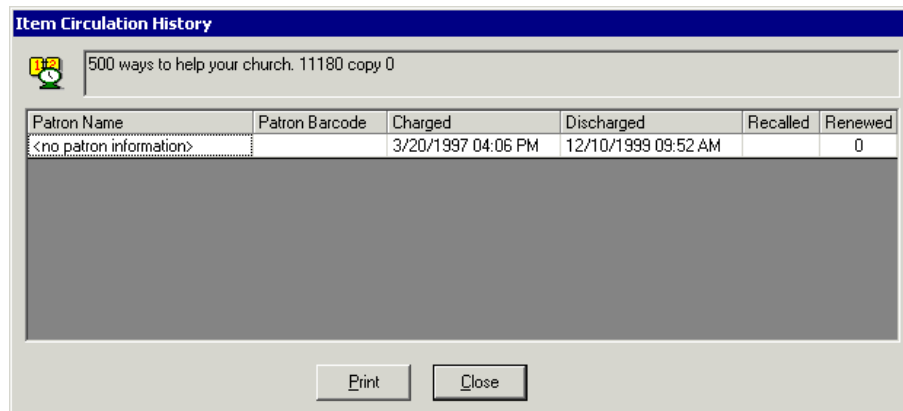
[Table 5-12](#) describes the **View Circulation History** dialog box.

**Table 5-12. View Circulation History dialog box**

Name	Description
Title	Unlabeled field containing the title and author information.
Patron Name column	Names of patrons who have charged this item.
Patron Barcode column	Barcodes of patrons who have charged this item.
Charged	Date when the item was charged by this patron.
Discharged	Date when the item was discharged by this patron.
Recalled	Date a recall was placed in this item from the patron listed.
Renewed	Number of times the item was renewed by the patron.
Print button	Prints the dialog box.  Users can customize the format in which the list prints, changing heading information, font sizes and other details. See <a href="#">Circulation History Stanza</a> on <a href="#">page A-34</a> .
Close button	Closes the dialog box.

**NOTE:**

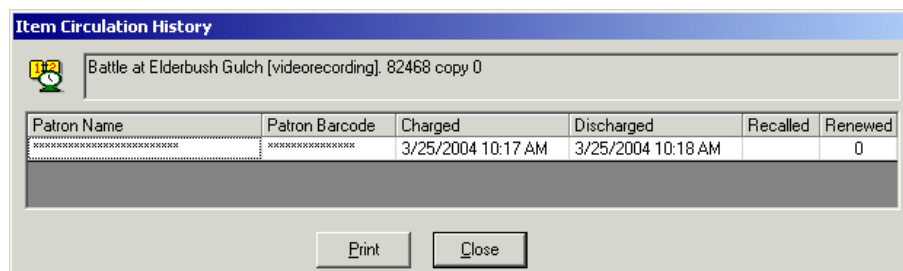
If a patron has been deleted from the database, <no patron information> displays in the **Patron Name** column of the **View Circulation History** dialog box (see [Figure 5-23](#)).



**Figure 5-23. Item Circulation History with No Patron Information**

**NOTE:**

If the operator does not have the security to view the patron information, a run of asterisks displays in the **Patron Name** and **Patron Barcode** columns ([Figure 5-24](#)).



**Figure 5-24. Item Circulation Dialog Box Displaying Asterisks**

**NOTE:**

If an item's circulation history lists more than one patron, to facilitate easier identification and access to relevant information, you can sort all display columns in Voyager Circulation by clicking the column header, such as Patron Name, to organize the display in ascending or descending sort order by the patron's name; a second click of the same header reverses the sort by the patron's name.

The procedure for viewing an item's circulation history is shown in [Procedure 5-10, Viewing an Item's Circulation History](#).



---

**Procedure 5-10. Viewing an Item's Circulation History**

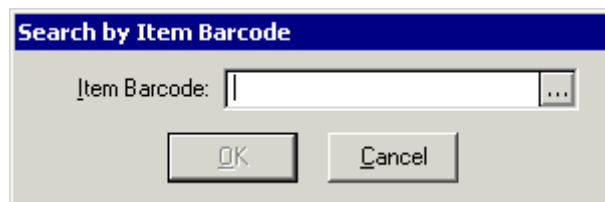
---

Use the following to view an item's circulation history if available:

1. After logging in to the Circulation module, click the **Item** button from the Circulation toolbar or select **Item** from the **Functions** menu.

Result: The **Search by Item Barcode** dialog box opens (see [Figure 5-25](#)).

---

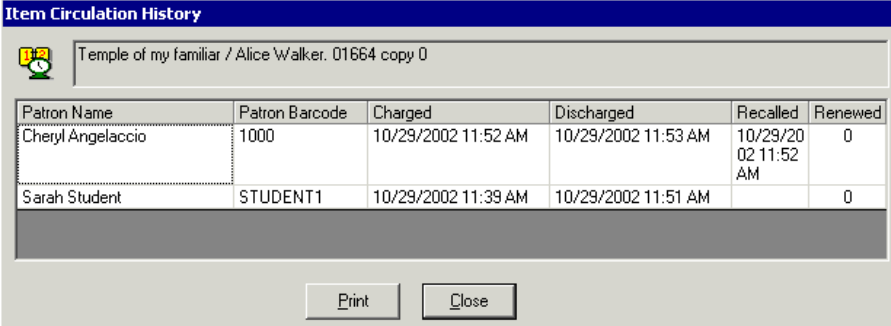


---

**Figure 5-25. Search by Item Barcode Dialog Box**

2. Search for the wanted item. See [Searching for an Item](#) on [page 3-11](#).
3. Once the item is found, select **View Circulation History** from the **Item** menu.

Result: The **Item Circulation History** dialog box opens (see [Figure 5-26](#)).



Patron Name	Patron Barcode	Charged	Discharged	Recalled	Renewed
Cheryl Angelaccio	1000	10/29/2002 11:52 AM	10/29/2002 11:53 AM	10/29/2002 11:52 AM	0
Sarah Student	STUDENT1	10/29/2002 11:39 AM	10/29/2002 11:51 AM		0

---

**Figure 5-26. Item Circulation History Dialog Box**

**NOTE:**

If the operator's security profile does not allow their viewing of circulation history, the patron name and barcode display as a run of asterisks. (The number of asterisks do not reflect the number of characters in the name or barcode).

4. To print the item's history, click the **Print** button.
5. Click the **Close** button to close the dialog box.

---

## Viewing an Item's Outstanding Fines

You can view any fines which are associated with a particular item in the **Outstanding Fines for this Item** dialog box (see [Figure 5-27](#)). Patrons that have incurred fines with this item are listed, as well as their barcodes and the amount of their fines. If there are no fines associated with the item, the box will be empty.

Patron Name	Barcode	Amount
Marcie Matriculate	MM12345	\$15.00

**Figure 5-27. Outstanding Fines for this Item Dialog Box**

[Table 5-13](#) describes the **Outstanding Fines for this Item** dialog box.

**Table 5-13. Outstanding Fines for Item dialog box**

Name	Description
Title	Unlabeled field for the title and author of the item.
Patron Name	Name of the patron(s) who have outstanding fines for this item.
Barcode	Barcode of the patron(s) who have outstanding fines for this item.
Amount	Amount of the outstanding fine.
Patron Fines button	Opens the Patron Fines/Fees dialog box. See <a href="#">Patron Fines/Fees</a> on <a href="#">page 4-86</a> .
Close button	Closes the Outstanding Fines for this Item dialog box and returns to the item record.

The procedure for viewing the outstanding fines for an item is shown in [Procedure 5-11, Viewing the Outstanding Fines for an Item](#).

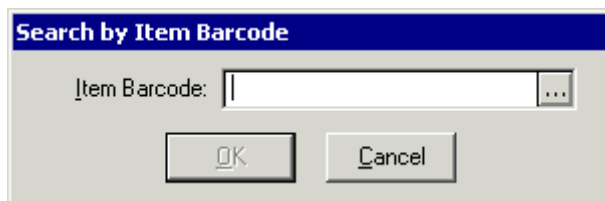


### **Procedure 5-11. Viewing the Outstanding Fines for an Item**

Use the following to view outstanding fines for an item:

1. After logging in to the Circulation module, click the **Item** button from the Circulation toolbar or select **Item** from the **Functions** menu.

Result: The **Search by Item Barcode** dialog box opens (see [Figure 5-28](#)).

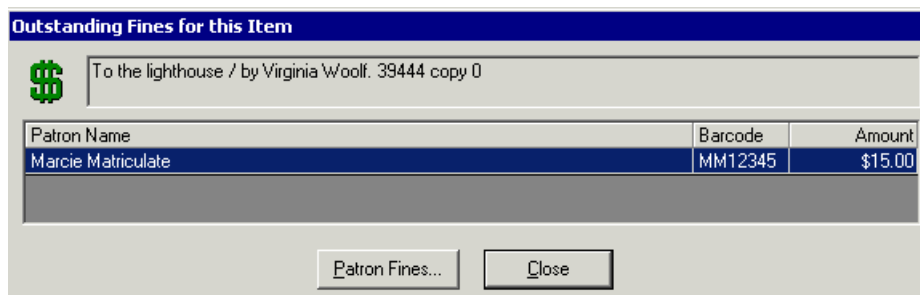


---

**Figure 5-28. Search by Item Barcode Dialog Box**

2. Search for the wanted item. See [Searching for an Item](#) on [page 3-11](#).
3. Once the item is found, select **Outstanding Fines** from the **Item** menu.

Result: The **Outstanding Fines for this Item** dialog box opens (see [Figure 5-29](#)).



---

**Figure 5-29. Outstanding Fines for this Item Dialog Box**

4. Click the **Patron Fines** button to view the selected patron's fine/fee information.

Result: The **Patron Fines/Fees** dialog box opens.

5. Click **OK** to close the dialog box and return to the item record.

See [Patron Fines/Fees](#) on [page 4-86](#) for information on patron fines and fees.

---



## Adding Bibliographic, Holdings, and Item Records

---

In the circulation module operators can add brief bibliographic, holdings, and item records to the database using the **Add Bib/Item** dialog box. This action is sometimes called adding an item “on-the-fly.”

### NOTE:

When adding bibliographic and holdings records, the input of the data is converted internally from Latin-1 to UTF-8 encoding and stored in the database in the Unicode character set.

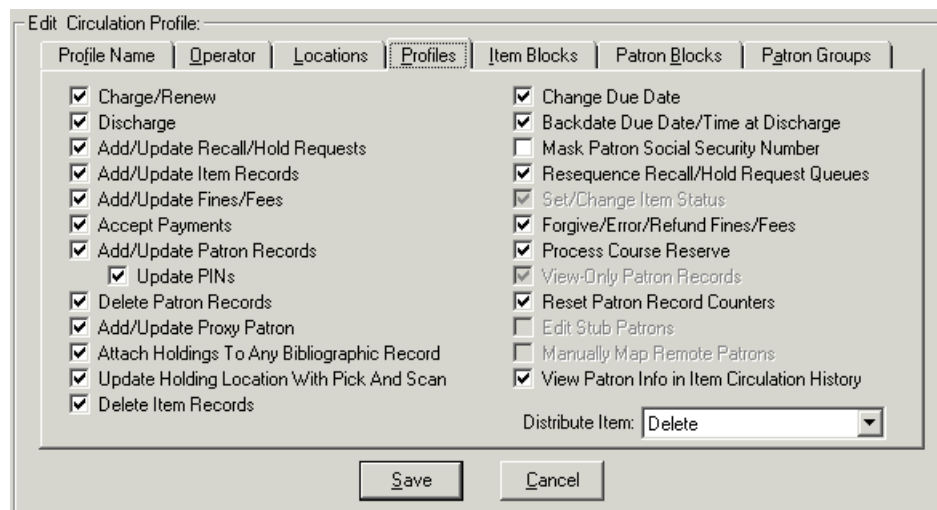
The system uses the `Circbib.cfg` file located on the operators computer to configure the templates and fields available on the **Bib** tab of the **Add Bib/Item** dialog box when creating a bibliographic record in the Circulation module.

Once created, the brief bibliographic records can be overlaid with a complete MARC record or deleted from the database. This must be performed either in the Cataloging module or by using the Bulk Import batch job. See the *Voyager Cataloging User's Guide* and the *Voyager Technical User's Guide* for more information.

## Security

---

Depending on your security profile, you may or may not be allowed to create items on-the-fly. Operators that have the **Attach Holdings to Any Bibliographic Record** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to create items on-the-fly. See [Figure 5-30](#).



**Figure 5-30. Attach Holdings to Any Bibliographic Record check box**

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

## Add Bib/Item Dialog Box

---

The **Add Bib/Item** dialog box ([Figure 5-31](#)) adds records to the database. It contains the **Bib**, **Holdings**, and **Item** tabs.

The screenshot shows a Windows-style dialog box titled "Add Bib/Item". It has three tabs: "Bib", "Holdings", and "Item". The "Bib" tab is active. The fields are organized as follows:

- Template:** A dropdown menu with "Book" selected.
- Date:** A text box containing "2000".
- Place:** A dropdown menu with "No place, unknown, or undetermined" selected.
- Language:** A dropdown menu with "English" selected.
- ISBN:** A text box.
- OCLC Number:** A text box.
- Author:** A text box.
- Title:** A text box.
- Series:** A text box.
- Edition:** A text box.
- Pub Number:** A text box.
- Place:** A text box.
- Publisher:** A text box.
- LCCN:** A text box.

At the bottom right are "OK" and "Cancel" buttons.

**Figure 5-31. Add Bib/Item Dialog Box**

The **Bib** tab contains the fields used to create a bibliographic record. The fields on this tab are configured using the `Circbib.cfg` file. Therefore, this tab is customizable.

The **Holdings** tab contains the field used to create a MFHD record. It is not customizable.

The **Items** tab contains the fields used to create the item record. It is not customizable.

For ISSN/ISBN validation with record creation, see [Table 13-4](#) on [page 13-8](#).

### Circbib.cfg file - Customizing the Bib Tab Fields

The `Circbib.cfg` file contains the specifications for the templates and their associated fields used on the **Bib** tab on the **Add Bib/Item** dialog box.

This file is located in the `c:\Voyager\Circulation` directory on your computer.

The `Circbib.cfg` file contains several stanzas that govern the **Bib** tab.

The structure of the `Circbib.cfg` file is as follows:

[Templates] stanza

    [Book] stanza

        Default Variables

            DateOn=

            DateDefault=

            Format-On

            FormatDefault=

            LangOn=

            LangDefault=

            PlaceOn=

            PlaceDefault=

        Field Variables

            F1=

            F1Marc=

            F1Default=

            F1Required=

    [Journal] stanza

        Default Variables

        Field Variables

    [Other] stanza

        Default Variables

        Field Variables

[Format] stanza

[Country] stanza

[Language] stanza

[Filing] stanza

The `Circbib.cfg` file defines the templates that are available as well as defining the fields and defaults used in the templates.

Each stanza contains a name followed by variables and data elements. The name of each stanza is always in square brackets [ ]. The format for variables and data elements is the variable followed by an equals sign (=) followed by the data element. For example, *variable=data element* (no spaces before or after the equals sign).

### Templates Stanza

The name of the first stanza in the file is the [Templates] stanza (see [Figure 5-32](#)). This stanza lists the types of templates available when adding a bibliographic record. The default templates are book, journal, and other. Operators can customize the existing templates, for example, book, journal, other, or create new templates.

For example, a book template would be used when creating a bibliographic record for a book, and a journal template used for creating a bibliographic record for a journal.

```
[Templates]
Template1=Book
Template2=Journal
Template3=Other
```

**Figure 5-32.** [Template] Stanza of the Circbib.cfg File

See [Adding a New Template Stanza](#) on [page 5-45](#) for more information.

For each template listed there are associated stanzas in the file that govern the fields and defaults for that template. For example, Book, in the [Templates] stanza is the name of a subsequent stanza in the file.

### Book, Journal, and Other Stanzas in the Circbib.cfg file

The [Book], [Journal], and [Other] stanzas, in addition to any stanzas defined by the user, contain a name (in square brackets), a set of default variables (date, format, language, place), and up to 11 field variables.

A sample [Book] stanza is shown in [Figure 5-33](#). Using this stanza, after selecting Book from the **Template** field on the **Bib** tab, the **Date** field would be populated with 2000, the **Place** field would not be populated as a default is not selected, the **Language** field would display, *English*, and the **ISBN**, **OCLC Number**, **Author**, and **Title** fields are available.

**NOTE:**

This example only contains four variable fields, but the operator can define up to eleven fields.

---

```
[Book]
DateOn=Yes
DateDefault=2000
FormatOn=No
FormatDefault=am
LangOn=Yes
LangDefault=eng
PlaceOn=Yes
PlaceDefault=xx
F1=ISBN
F1Marc=020| |a
F1Default=
F1Required=No
F2=OCLC Number
F2Marc=035| |a
F2Default=
F2Required=No
F3=Author
F3Marc=1001|a
F3Default=
F3Required=No
F4=Title
F4Marc=2451?a
F4Default=
F4Required=Yes
```

---

**Figure 5-33. Sample Book Stanza in the Circbib.cfg File**

[Table 5-14](#) describes the fields and variables in the [Book] stanza.

**Table 5-14. Description of Fields in the Book Stanza**

Stanza Name and Variables	Description of Data Element
[Book]	Template name.
Default Variables	
DateOn=Yes	Blank date field displays if no default.

**Table 5-14. Description of Fields in the Book Stanza**

Stanza Name and Variables	Description of Data Element
DateDefault=2000	Date field displays 2000.
FormatOn=No	Blank format field does not display. If Yes, then the drop-down list contains Book as the first option, followed by the list of formats in the [Format] stanza in the <code>Circbib.cfg</code> file.
FormatDefault=am	Format is book, but the field does not display.
LangOn=Yes	Blank language field displays if no default.
LangDefault=eng	Language field displays english as first option in drop-down list box, followed by the list of languages in the [Language] stanza in the <code>Circbib.cfg</code> file.
PlaceOn=Yes	Blank place field displays if no default.
PlaceDefault=xx	Place field displays “No place, unknown” as first option in drop-down list box, followed by the list of places in the [Country] stanza in the <code>Circbib.cfg</code> file.
Field Variables	
F1=ISBN	Field 1 labeled ISBN.
F1Marc=020  a	Field 1 mapped to Marc field 020 subfield a.
F1Default=	Field 1 has no default information.
F1Required=No	Field 1 is not required to save record.
F2 - F11	Additional fields to display on the template. For each field include its name, MARC mapping information, and default information if required.

Depending on the settings in the `Circbib.cfg` file, the **Bib** tab can display several different fields that can contain default information.

The first eight variables in each stanza are default variables. The remaining variables are field variables.

## Default Variables

There are four sets of default variables that determine whether the fields display on the **Bib** tab, as well as default values for each field. They are described in [Table 5-15](#).

**Table 5-15. Default Variables and Bib Tab Display**

If default variable is set such that	and	then the Bib tab displays
The DateOn=No FormatOn=No LanguageOn=No PlaceOn=No		neither a blank field nor any default information will display on the Bib tab.
The DateOn=Yes FormatOn=Yes LanguageOn=Yes PlaceOn=Yes	the DateDefault= FormatDefault= LanguageDefault= PlaceDefault=  where no defaults are defined,	blanks in the Date, Format, Language, and Place fields.
The DateOn=Yes FormatOn=Yes LanguageOn=Yes PlaceOn=Yes	the DateDefault=2000 FormatDefault=am LanguageDefault=eng PlaceDefault=ilu  that is, where the variables are defined as shown,	the  Date field as 2000 Format field as Book Language field as English Place field as Illinois.  That is these fields are populated by the information entered in the default variable.

Also, the `Circbib.cfg` file includes the following stanzas:

- `[Format]` which lists the possible values for `FormatDefault`. If `FormatOn=Yes`, the formats listed in the `[Format]` stanza display in the **Format** field in a drop-down list box.
- `[Language]` which lists the possible values for `LangDefault`. If `LanguageOn=Yes`, the languages listed in the `[Language]` stanza display in the **Language** field in a drop-down list box.
- `[Country]` which lists the possible values for `PlaceDefault`. If `PlaceOn=Yes`, the countries listed in the `[Country]` stanza display in the **Country** field in a drop-down list box.



## Field Variables

Field variables determine how many other fields display on the **Bib** tab along with the default fields, the corresponding MARC field to which the information will be mapped, defaults values for the MARC fields, and whether the field is required.

The ***F<sub>n</sub>*** variable, where *n* is a number from 1 through 11, defines the field labels which appear on the **Bib** tab and the data element.

### NOTE:

You are not required to define all the fields, F1 through F11.

The ***F<sub>n</sub>MARC*** variable, where *n* is a number from 1 through 11, is used to map the information entered in the corresponding *F<sub>n</sub>* field on the **Bib** tab to the MARC field, indicators, and subfield of a bibliographic record.

For example, **F1MARC=020 | a** means the information entered in field 1 of the **Bib** tab is mapped to MARC field 020, subfield a of a bibliographic record.

Indicator symbols can be numbers or the following characters:

- The pipe symbol (<Shift> key + <Backslash> key) means that there are no valid values for the indicator, that is, the indicator is blank.
- The question mark means that there are multiple valid values for the indicator. The question mark is used because a template can accommodate one value only.

The ***F<sub>n</sub>Default*** variable is used to display specific information in this field on the **Bib** tab.

The ***F<sub>n</sub>Required*** variable indicates if the corresponding field must be entered on the **Bib** tab before saving the new bib record. Enter **Yes** or **No**. If **Yes**, the field label on the **Bib** tab appears bold to indicate that the field is required and must be entered.

## Adding a New Template Stanza

Operators may have as many templates defined in the `Circbib.cfg` file as wanted. In order to create a new template in the file, you must add its name to the `[Templates]` stanza and create the stanza's structure.

The procedure to add a new template stanza is shown in [Procedure 5-12, Adding a New Template Stanza](#).



---

**Procedure 5-12. Adding a New Template Stanza**

---

Use the following to add a new template stanza to the `Circbib.cfg` file.

1. Open the `Circbib.cfg` file with a text editor, such as Notepad.
2. In the `[Templates]` stanza enter the new template using the following format:  
`TemplateN=label`, where *N* is the number of the next template and *label* is the name of the template as it will appear on the **Bib** tab. The following example creates a fourth template that is named Scores:

*Template4=Scores*

3. Create the stanza's structure which includes the stanza's name, default variables, and the field variables.

**TIP:**

Use the editing tools to copy one of the existing stanzas named in the `[Templates]` stanza and paste it after the last stanza referred to in the list.

For example, enter

```
[Scores]  
Default Variables  
DateOn=Yes  
DateDefault=2002  
FormatOn=Yes  
FormatDefault=cm  
LangOn=Yes  
LangDefault=  
PlaceOn=Yes  
PlaceDefault=xx  
Field Variables  
F1=Title  
F1Marc=2451?a  
F1Default=
```

*F1Required=Yes*

*F2=Author*

*F2Marc=1001/a*

*F2Default=*

*F2Required=No*

*F3=Edition*

*F3Marc=250//a*

*F3Default=*

*F3Required=No*

*F4=Publisher*

*F4Marc=260//b*

*F4Default=*

*F4Required=No*

Result: A new template for musical scores is now available and the defaults and fields are defined on the **Bib** tab.

---

**NOTE:**

The [Book], [Journal], [Other], [Format], [Language], and [Country] stanzas can be edited so that your `Circbib.cfg` file is more manageable. For example, you can rearrange the language codes so that the codes you use most often are at the top of the list and display first on the drop-down list.

Any information under the [Filing] stanza that displays is left out in the title count.

Any information with a “#” before it is not read until you remove the “#.” You may also add a “#” before a line in order to deactivate it.

**Bib Tab**

[Table 5-16](#) describes the bibliographic field variables for the pre-defined [Book] stanza.

**Table 5-16. Bibliographic Field Variables for the Book Stanza**

Variable	Description
F1=ISBN	International Standard Book Number. Maps to MARC field 020, subfield a.
F2=OCLC Number	OCLC system number. Maps to MARC field 035, subfield a.
F3=Author	Creator of the item. Maps to MARC field 100, subfield a (surname).
F4=Title	Title of the bibliographic record. Maps to MARC field 245, subfield a.
F5=Series	Series title information. Maps to the MARC field 440, subfield a.
F6=Edition	Version of the title being ordered, for example, the second revised addition. Maps to the MARC field 250, subfield a.
F7=Pub. No.	Publisher's identification number. Maps to the MARC field 028, subfield a.
F8=Place	Place where the title was published. Maps to the MARC field 260, subfield a.
F9=Publisher	Name of the publisher. Maps to the MARC field 260, subfield a.
F10=LCCN	Library of Congress Control Number. Maps to the MARC field 010, subfield a.
F11=blank	

**NOTE:**

You can edit any of the field variables in the [Book] stanza.

The **Bib** tab ([Figure 5-34](#)) is where operators create the brief bibliographic record.

**Add Bib/Item**

**Bib** | Holdings | Item

Template: Book

Date: 2000

Place: No place, unknown, or undetermined

Language: English

ISBN:  OCLC Number:

Author:

Title:

Series:

Edition:  Pub Number:

Place:  Publisher:

LCCN:

OK Cancel

**Figure 5-34. Bib Tab**

[Table 5-17](#) describes the **Bib** tab shown in [Figure 5-34](#).

**Table 5-17. Bib Tab**

Name	Description
Template	Drop-down list box includes three pre-defined templates for book, journal, and other. When you choose one of these templates from the list, the Bib tab updates to display different information fields. The information fields on the Holdings and Item tabs are always the same.
Date	Date of publication.
Place	Place of publication.
Language	Language in which the item is written.
ISBN	International Standard Book Number.
OCLC Number	Item's OCLC number.
Author	Creator of the item

**Table 5-17. Bib Tab**

Name	Description
Title	Title of the item.  <b>NOTE:</b> This field is required.
Series	Name of a group of items that are related to each other. One item is considered part of the group or series.
Edition	Version of the title.
Pub. Number	Publishers identification number.
Place	Place of publication.
Publisher	Name of the item's publisher.
LCCN	Library of Congress Card Number.

### Holdings Tab

The **Holdings** tab ([Figure 5-35](#)) is where operators create the holdings record. The fields on the **Holdings** tab are pre-defined and cannot be changed.

---

The screenshot shows a software dialog box titled "Add Bib/Item". It has three tabs: "Bib", "Holdings", and "Item". The "Holdings" tab is currently selected. Inside the dialog, there are several input fields arranged vertically: "Location:" with a dropdown arrow, "Call No. Type:" with a dropdown arrow, "Call Number:" with a text input field, "Enumeration:" with a text input field, "Chronology:" with a text input field, "Year:" with a text input field, "Caption:" with a text input field, and "FreeText:" with a text input field. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

**Figure 5-35. Holdings Tab of the Add Bib/Item Dialog Box**

[Table 5-18](#) describes the **Holdings** tab.

**Table 5-18. Holdings Tab**

Name	Description
Location	Location of the item.
Call No. Type	Description for the call number's item identification methodology. For example, Library of Congress.
Call Number	Item's identification number.
Enumeration	Descriptive caption, numbering, and value scheme (for example, Volume, Roman and IV).
Chronology	Descriptive format and value scheme (for example Spring 1995).
Year	Enumeration year (if serially published) or the publication year (if an individual item).
Caption	Additional title information.
Free Text	Free text field to enter additional item information.

### Item Tab

The **Item** tab ([Figure 5-36](#)) allows the operator to create the item record. The fields on the **Item** tab are pre-defined and cannot be changed.

The screenshot shows the 'Add Bib/Item' dialog box with the 'Item' tab selected. The dialog has three tabs: 'Bib', 'Holdings', and 'Item'. The 'Item' tab contains the following fields and options:

- Temp. Location:** A dropdown menu.
- Item Type:** A dropdown menu with 'Book' selected.
- Media Type:** A dropdown menu.
- Spine:** A text input field.
- Price:** A text input field with '\$0.00'.
- Copy:** A text input field with '0'.
- Pieces:** A text input field with '1'.
- Self Check:** A group box containing two checkboxes: 'Magnetic Media' and 'Sensitize'.
- Circulation Review:** An unchecked checkbox.
- Cataloging Review:** An unchecked checkbox.
- Item Barcode:** A text input field.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

---

**Figure 5-36. Item Tab of the Add Bib/Item Dialog Box**

[Table 5-19](#) describes the **Item** tab.

**Table 5-19. Item Tab**

Name	Description
Temp.[orary] Location	Item's temporary location.
Item Type	Item's type (for example, a book).
Media Type	Item's media type (used for Media Scheduling only).



Table 5-19. Item Tab

Name	Description
Self Check Magnetic Media Sensitize	<p>The Magnetic Media and Sensitize check box options set item record level flags for interfacing with third-party self-check machines for item check in, check out, and renewal transactions. These are used for magnetic media and sensitize alerts.</p> <p>Click the Magnetic Media and Sensitize check boxes per your item record requirements for self-check processing. When the option is checked, the item record flag is set to Yes (Y). When the option is unchecked, the item record flag is set to No (N).</p> <p>Use Session Preferences to set the default for these check boxes. See the <a href="#">Items and Searching Tab</a> section starting on page <a href="#">13-7</a>.</p> <p>Refer to the <i>Voyager Interface to Self Check Modules Using 3M SIP User's Guide</i> for additional information.</p>
Spine	Any additional item information that displays on the spine label.
Price	Price of the item.
Copy	Item's copy number.
Pieces	Number of pieces that are associated with the item.
Circulation Review	Select this option if, upon discharge, you want the circulation operator to be notified that the item is marked for review.
Cataloging Review	Select this option if, upon discharge, you want the circulation operator to be notified that the item is marked for review.
Item Barcode	Item's unique identifier.

The procedure for adding brief bibliographic, holdings, and item records in Circulation is shown in [Procedure 5-13, Adding Brief Bibliographic, Holdings, and Item Records](#).



---

**Procedure 5-13. Adding Brief Bibliographic, Holdings, and Item Records**

---

Use the following to add brief bibliographic, holdings, and item records.

1. After logging in to the Circulation module, click the **Item** button from the Circulation toolbar or select **Item** from the **Functions** menu.

Result: The **Search by Item Barcode** dialog box opens.

2. Search for the wanted item. See [Searching for an Item](#) on [page 3-11](#).
3. Once the item is found, select **Add Bib/Item** from the **Item** menu or right-click and select the same command from the submenu.

**NOTE:**

The command for this option is **Add Bib/Item**. However, you are creating a holdings record as well.

Result: The **Add Bib/Item** dialog box opens (see [Figure 5-37](#)).

---

The screenshot shows the 'Add Bib/Item' dialog box with the 'Bib' tab selected. The 'Template' dropdown is set to 'Book'. The 'Date' field contains '2000'. The 'Place' dropdown is set to 'No place, unknown, or undetermined'. The 'Language' dropdown is set to 'English'. The 'ISBN' and 'OCLC Number' fields are empty. The 'Author' field is empty. The 'Title' field is empty. The 'Series' field is empty. The 'Edition' field is empty. The 'Pub Number' field is empty. The 'Place' field is empty. The 'Publisher' field is empty. The 'LCCN' field is empty. The 'OK' and 'Cancel' buttons are at the bottom.

---

**Figure 5-37. Add Bib/Item Dialog Box**

---

4. Select a template from the drop-down list box in the **Template** field.
5. Enter information onto the **Bib**, **Holdings**, and **Item** tabs.

On the **Bib** tab as shown in [Figure 5-37](#) you must enter information into the **Title** field. Required fields are indicated by a boldface font.

**TIP:**

*Click each of the tabs and enter the information in the appropriate fields **before** clicking the **OK** button. Once you click **OK**, the bibliographic, holdings, and item records have been created and saved to the database. You can edit the item record in the Circulation module. However, bibliographic and holdings records can only be edited in the Cataloging module.*

See [Circbib.cfg file - Customizing the Bib Tab Fields](#) on [page 5-39](#) for more information about the fields that display on the **Bib** tab.

6. Click **OK** to save the bibliographic and item information. Otherwise, click **Cancel** to exit without saving.

Result: If clicked **OK**, the records are added.

---

## **Adding, Editing, and Deleting Item Records**

---

Once you have an item record displayed, you can view or edit the item record information, you can add a new item record, or you can delete the item record entirely. Lastly, you can also view the MARC bibliographic and holdings records to which the item record is attached.

**NOTE:**

Operators cannot delete bibliographic or holdings records in the Voyager Circulation module, only item records. If you need to delete a bibliographic or holdings record, you must do so from the Voyager Cataloging module.

## **Security**

---

Depending on your security profile, you may or may not be allowed to add, update, or delete item records. Operators that have the **Add/Update Item Records and Delete Item Records** check box selected on the **Profiles** tab in the

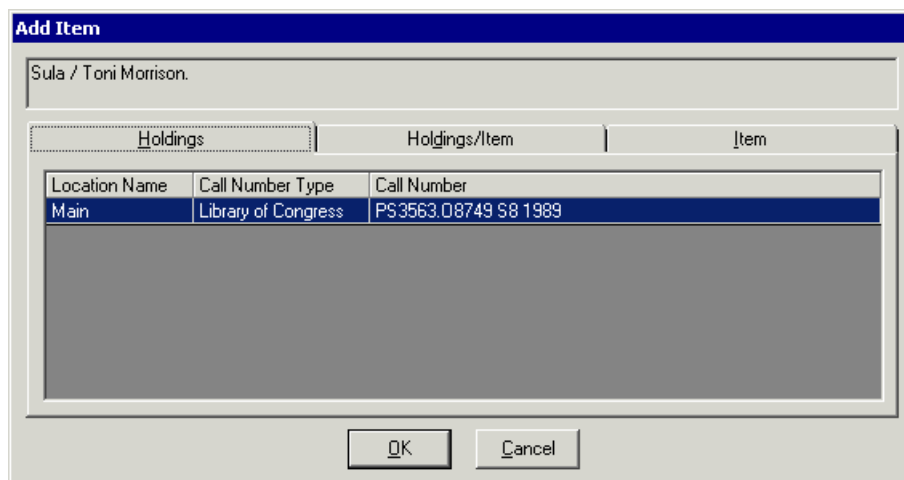
**Security - Circulation Profile** workspace in the System Administration module have the ability to add, update, or delete a item record (see [Figure 5-30 on page 5-38](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

### Add Item Dialog Box

---

Adding an Item Record in the Circulation module occurs in the **Add Item** dialog box (see [Figure 5-38](#)).



The screenshot shows the 'Add Item' dialog box. At the top, there is a text field containing 'Sula / Toni Morrison.'. Below this is a tabbed interface with three tabs: 'Holdings', 'Holdings/Item', and 'Item'. The 'Holdings' tab is selected. Inside this tab is a table with the following data:

Location Name	Call Number Type	Call Number
Main	Library of Congress	PS3563.D8749 S8 1989

Below the table is a large empty rectangular area. At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.

---

**Figure 5-38. Add Item Dialog Box when Linking to Existing Holdings**

[Figure 5-39](#) shows the **Add Item** dialog box without linking to existing holdings.

**Figure 5-39. Add Item Dialog Box when not Linking to Existing Holdings**

The **Add Item** dialog box contains three tabs, the **Holdings**, **Holdings/Item**, and **Items**.

### The Holdings Tab

The fields on the **Holdings** tab include the location name, call number type, and call number information of the Holdings record ([Figure 5-38](#)) to which you want to link the new item record.

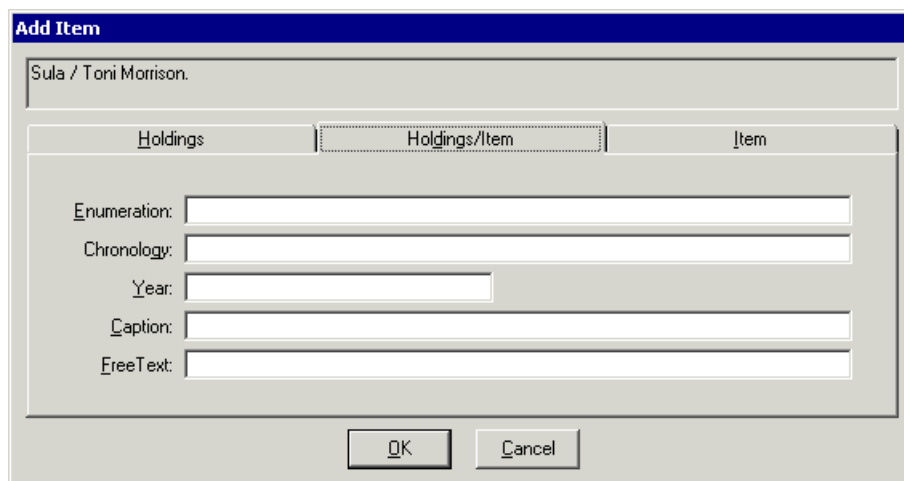
[Table 5-20](#) describes the **Holdings** tab.

**Table 5-20. Holdings Tab of the Add Item Dialog Box**

Name	Description
Title	Unlabeled field containing the title of the item.
Location	Item's permanent location.
Call No. Type	Description for the call number's item identification methodology, for example, Library of Congress.
Call Number	Item's identification number.

### The Holdings/Item Tab

The fields on the **Holdings/Item** tab ([Figure 5-40](#)) allow the operator to add additional information to the item record.



**Figure 5-40. Holdings/Items Tab of the Add Item Dialog Box**

[Table 5-21](#) describes the **Holdings/Item** tab.

**Table 5-21. Holdings/Item Tab of the Add Item Dialog Box**

Name	Description
Title	Unlabeled field containing the title of the item.
Enumeration	Descriptive caption, numbering, and value scheme (for example, Volume, Roman and IV).
Chronology	Descriptive format and value scheme (for example Spring 1995).
Year	Enumeration year (if serially published) or the publication year (if an individual item).
Caption	Additional title information.
Free Text	Free text field to enter additional item information.

### The Item Tab

The fields on the **Item** tab ([Figure 5-41](#)) allow the operator to add additional information to the item record.

**Add Item**

Harry Potter and philosophy : if Aristotle ran Hogwarts / edited by David Baggett and Shawn E. Klein.

**Holdings** | Holdings/Item | Item

Temp. Loc.:

Type:

Temp. Type:

Media Type:

Self Check

☐ Magnetic Media

☐ Sensitize

Spine:

Price:

Copy:  Pieces:

☐ Circulation Review

☐ Cataloging Review

Barcode:

**Figure 5-41. Items Tab of the Add Item Dialog Box**

[Table 5-22](#) describes the **Item** tab.

**Table 5-22. Item Tab of the Add Item Dialog Box**

Name	Description
Title	Unlabeled field containing the title of the item.
Temp.[orary] Location	Item's temporary location.
Item Type	Item's type (for example, a book).
Media Type	Item's media type (used only for Media Scheduling).

**Table 5-22. Item Tab of the Add Item Dialog Box**

Name	Description
Self Check Magnetic Media Sensitize	<p>The Magnetic Media and Sensitize check box options set item record level flags for interfacing with third-party self-check machines for item check in, check out, and renewal transactions. These are used for magnetic media and sensitize alerts.</p> <p>Click the Magnetic Media and Sensitize check boxes per your item record requirements for self-check processing. When the option is checked, the item record flag is set to Yes (Y). When the option is unchecked, the item record flag is set to No (N).</p> <p>Refer to the <i>Voyager Interface to Self Check Modules Using 3M SIP User's Guide</i> for additional information.</p>
Spine	Additional item information that displays on the spine label.
Price	Price of the item.
Copy	Item's copy number.
Pieces	Number of pieces that are associated with the item.
Circulation Review	Select this if, upon discharge, you want the circulation operator to be notified that the item is marked for review.
Cataloging Review	Select this if, upon discharge, you want the circulation operator to be notified that the item is marked for review.
Barcode	Item's unique identifier.

The procedure for adding an item record in Circulation is shown in [Procedure 5-14, Adding an Item Record](#).



---

**Procedure 5-14. Adding an Item Record**

---

Use the following to add an Item record.

1. After logging in to the Circulation module, click the **Item** button from the Circulation toolbar, or select **Item** from the **Functions** menu.

Result: The **Search by Item Barcode** dialog box opens.

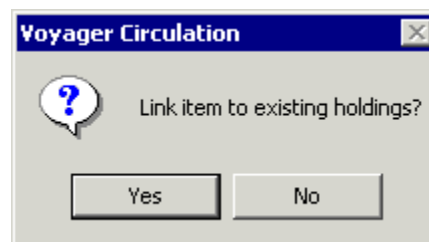


2. Search for the wanted item. See [Searching for an Item](#) on [page 3-11](#).

Result: The item record displays.

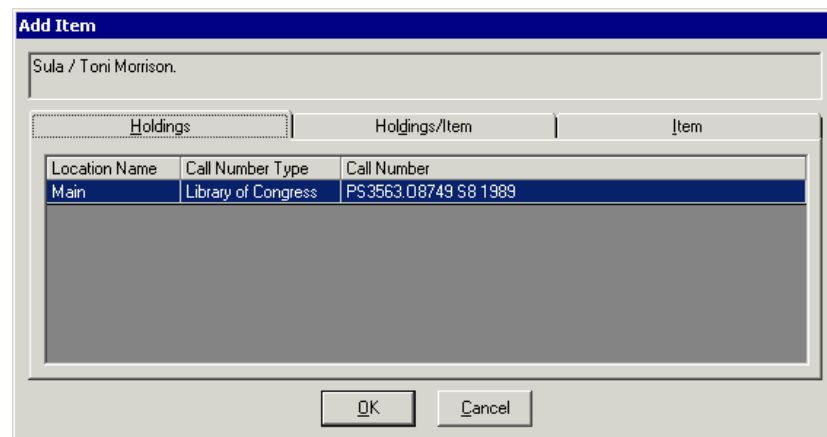
3. Select **Add Item (Ctrl + A)** from the **Item** menu (or right-click and select the same command from the submenu).

Result: The message **Link item to existing holdings?** displays (see [Figure 5-42](#)).



**Figure 5-42. Holdings Message**

4. If you choose **Yes**, the **Add Item** dialog box opens and the fields are populated with information (see [Figure 5-43](#)).



**Figure 5-43. Add Item Dialog Box for a New Item Record Linked to an Existing Holdings Record**

If you choose **No**, the **Add Item** dialog box opens; however, the fields on the **Holdings**, **Holdings/Item**, and **Item** tabs are blank so new information may be entered.

---

The screenshot shows the 'Add Item' dialog box with the title bar 'Add Item'. The main text area contains 'Sula / Toni Morrison.'. Below this are three tabs: 'Holdings', 'Holdings/Item', and 'Item'. The 'Holdings' tab is selected. It contains three input fields: 'Location:' with a dropdown arrow, 'Call No. Type:' with a dropdown arrow, and 'Call Number:' with a text box. At the bottom are 'OK' and 'Cancel' buttons.

---

**Figure 5-44. Holdings Tab of the Add Item Dialog Box for New Item Record Not Linked to an Existing Holdings Record**

5. Enter the appropriate information in the **Holdings** tab (see [Figure 5-44](#)).
  6. Select the **Holdings/Item** tab ([Figure 5-45](#)) and enter the item information.
- 

The screenshot shows the 'Add Item' dialog box with the title bar 'Add Item'. The main text area contains 'Sula / Toni Morrison.'. Below this are three tabs: 'Holdings', 'Holdings/Item', and 'Item'. The 'Holdings/Item' tab is selected. It contains five input fields: 'Enumeration:' with a text box, 'Chronology:' with a text box, 'Year:' with a text box containing '2000', 'Caption:' with a text box containing 'Millenium printing', and 'FreeText:' with a text box. At the bottom are 'OK' and 'Cancel' buttons.

---

**Figure 5-45. Holdings/Item Tab of the Add Item Dialog Box**

7. Select the **Item** tab ([Figure 5-46](#)) and enter the item information.

The screenshot shows the 'Add Item' dialog box with the 'Item' tab selected. The title bar reads 'Add Item'. The main text area contains 'Harry Potter and philosophy : if Aristotle ran Hogwarts / edited by David Baggett and Shawn E. Klein.' Below this is a tabbed interface with three tabs: 'Holdings', 'Holdings/Item', and 'Item'. The 'Item' tab is active. It contains several input fields: 'Temp. Loc.' (dropdown menu showing 'Cataloging desk'), 'Type' (dropdown menu showing 'Book'), 'Temp. Type' (dropdown menu), and 'Media Type' (dropdown menu). To the right of these are 'Spine' (text field), 'Price' (text field showing '\$21.99'), 'Copy' (text field showing '1'), and 'Pieces' (text field showing '1'). Below the 'Price' field are two checkboxes: 'Circulation Review' and 'Cataloging Review'. At the bottom right is a 'Barcode' text field showing '98765439'. On the left side, under 'Self Check', are two checkboxes: 'Magnetic Media' and 'Sensitize'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

**Figure 5-46. Item Tab of the Add Item Dialog Box**

8. Click **OK** to save the new item record to the database and close the **Add Item** dialog box. Otherwise, click **Cancel** to close the dialog box without saving.

Result: The new item record is linked to the existing record (see [Figure 5-47](#)).

The screenshot shows a software window titled "Item Record". At the top, there is a text field for "Title" containing "Sula / Toni Morrison.". To the right of this field are several icons: a printer, a floppy disk, a person, a magnifying glass, a bar chart, and a pie chart. Below the title field is a table with the following data:

Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
Main	Book	Not Charged			0	15854
<T> Branch General	Book	Not Charged			1	34989390

Below the table is a tabbed interface with five tabs: "Bib Brief", "Holdings", "Item/Holdings", "Item Details", and "Item History". The "Bib Brief" tab is currently selected, displaying the following information:

Author: Morrison, Toni.  
Edition:   
Publisher: Knopf : Distributed by Random House  
Place/Date: New York : 1989  
Pub. No.:   
Series:   
ISSN:   
System No.: ocm21682396  
ISBN: 0394480449  
LCCN: 73007278  
Owning Library: Training Master DB

---

**Figure 5-47. Item Displaying New Item Record Added**

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## Editing an Existing Item Record

---

Editing an existing item record occurs in the **Edit Item** dialog box (see [Figure 5-48](#)).

**Figure 5-48. Item Tab of the Edit Item Dialog Box**

The **Edit Item** dialog box is very similar to the **Add Item** dialog box except that the **Item** tab includes the **Perm Loc.** field. When you are creating a new item record, the **Perm Loc.** field is automatically populated with the location selected on the **Holdings** tab.



**IMPORTANT:**

*Information on the **Holdings** tab cannot be edited in the Circulation module. Edit Holdings information using the Cataloging module.*

The procedure for editing an item record in Circulation is shown in [Procedure 5-15, Editing An Item Record](#).



**Procedure 5-15. Editing An Item Record**

Use the following to edit an item record:

1. After logging in to the Circulation module, click the **Item** button from the Circulation toolbar or select **Item** from the **Functions** menu.

Result: The **Search by Item Barcode** dialog box opens.

2. Search for the wanted item. See [Searching for an Item](#) on [page 3-11](#).

Result: The item record displays.

3. Select **Edit Item (Ctrl + E)** from the **Item** menu (or right-click and select the same command from the submenu).

Result: The **Edit Item** dialog box opens.

4. Select the **Holdings/Item** and **Item** tabs and edit the holdings and item information.
5. Click **OK** to save your changes and close the **Edit Item** dialog box. Otherwise, click **Cancel** to close the dialog box without saving.

Result: The item record is edited/canceled per your selection.

---

## Deleting an Item Record

---

Operators may delete item records only from within the Circulation module, they may not delete bibliographic or holdings records.

The procedure for deleting an item record in Circulation is shown in [Procedure 5-16, Deleting an Item Record](#).



### Procedure 5-16. Deleting an Item Record

---

Use the following to delete an item record:

1. After logging in to the Circulation module, click the **Item** button from the Circulation toolbar or select **Item** from the **Functions** menu.

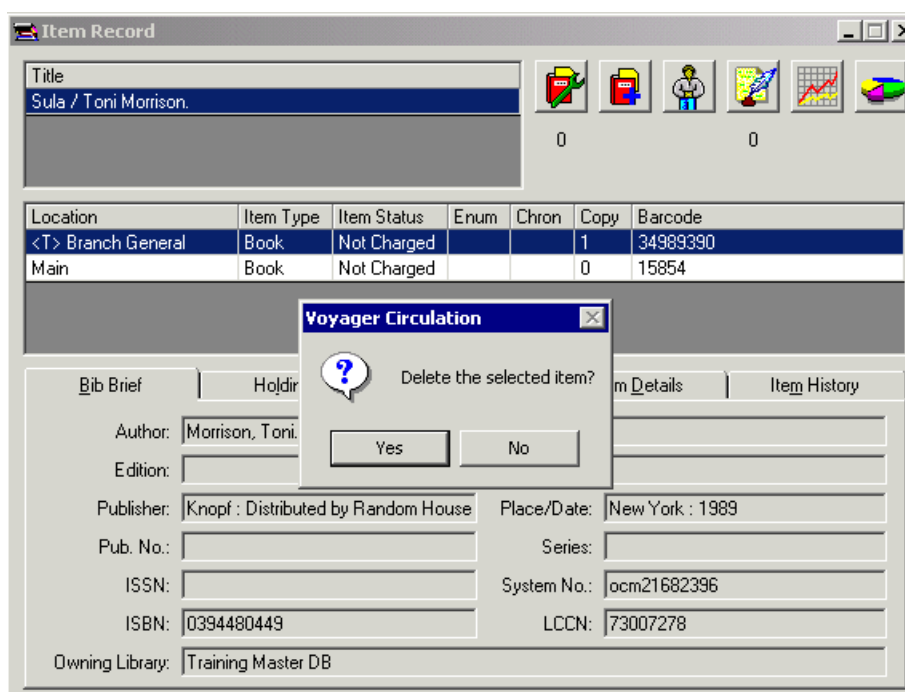
Result: The **Search by Item Barcode** dialog box opens.

2. Search for the wanted item. See [Searching for an Item](#) on [page 3-11](#).

Result: The item record displays.

3. Select **Delete Item** from the **Item** menu.

Result: A confirmation dialog box opens asking you to confirm the delete action (see [Figure 5-49](#)).



**Figure 5-49. Confirmation of the Deletion Message**

4. Click **Yes** to delete the item. Otherwise, click **No** to cancel the delete action.

Result: The item record is deleted.

## Resequencing Item Records

You can resequence item records linked to the same holdings record to reflect the order you prefer. For example, you might want to resequence item records based on the copy number.

The item sequence numbers themselves do not display in Circulation. Rather, they are used by the item display program to determine the proper sequence of the information and to display the information correctly in Circulation.

Resequencing item records occurs in the **Resequence Items** dialog box (see [Figure 5-50](#)).

**Figure 5-50. Resequence Items Dialog Box**





[Table 5-23](#) describes the **Resequence Items** dialog box.

**Table 5-23. Resequence Items Dialog Box**

Name	Description
Title	Unlabeled field containing the title of the item.
Location Name	Item's permanent location.
Call No. Type	Description for the call number's item identification methodology. For example, Library of Congress.
Call Number	Item's identification number.
Location	Location of the item.
Item Type	Item's type (for example, a book).
Item status	Status of the item.
Enumeration	Descriptive caption, numbering, and value scheme (for example, Volume, Roman and IV).
Chronology	Descriptive format and value scheme (for example Spring 1995).
Copy	Item's copy number.
Barcode	Item's barcode.



**Table 5-23. Resequence Items Dialog Box**

Name	Description
Up arrow 	Moves the item up one.
Up arrow 	Moves the item to the top of the list.
Down arrow 	Moves the item down one in the list.
Down arrow 	Moves the item to the bottom of the list box.

The procedure for resequencing item records is shown in [Procedure 5-17, Resequencing Item Records](#).



### **Procedure 5-17. Resequencing Item Records**

Use the following to resequence item records:

1. After logging in to the Circulation module, click the **Item** button from the Circulation toolbar or select **Item** from the **Functions** menu.

Result: The **Search by Item Barcode** dialog box opens.

2. Search for the wanted item. See [Searching for an Item](#) on [page 3-11](#).

Result: The item record displays.

3. Select **Resequence Items (Ctrl + Q)** from the **Item** menu (or right-click and select the same command from the submenu).

Result: The **Resequence Items** dialog box opens (see [Figure 5-51](#)).

**Resequencing Items**

Journal of abnormal psychology.

Location Name	Call Number Type	Call Number
Main	Library of Congress	RC321 .J7 MFHD

Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
Main	Book	Not Charged			1	67594
Main	Book	Not Charged	v. 1, no. 5	2005	1	65161
Acquisitions	Book	Not Charged	no. 3	2008	1	15151
Acquisitions	Book	Not Charged	v. 3, no. 4 special issue 1232323452	2007	1	
Acquisitions	Book	Not Charged	v. 2, no. 9	2007	1	

Buttons: [Up] [Down] [OK] [Cancel]

**Figure 5-51. Resequencing Items Dialog Box**

- To resequence the item records, select the item to be moved and use the arrow buttons to move them up or down.

In the following example, the third item in the list is moved to the top (see [Figure 5-52](#)).

**Resequencing Items**

Journal of abnormal psychology.

Location Name	Call Number Type	Call Number
Main	Library of Congress	RC321 .J7 MFHD

Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
Acquisitions	Book	Not Charged	no. 3	2008	1	15151
Main	Book	Not Charged			1	67594
Main	Book	Not Charged	v. 1, no. 5	2005	1	65161
Acquisitions	Book	Not Charged	v. 3, no. 4 special issue 1232323452	2007	1	
Acquisitions	Book	Not Charged	v. 2, no. 9	2007	1	

Buttons: [Up] [Down] [OK] [Cancel]

**Figure 5-52. Items After Resequencing**

Result: Click **OK** to save the changes and close the **Resequencing Items** dialog box. Otherwise, click **Cancel** to close the dialog box without saving (see [Figure 5-53](#)).

The screenshot shows a software window titled "Item Record". At the top, there is a text field for "Title" containing "Journal of abnormal psychology.". To the right of the title field are several icons and two "0" values. Below the title field is a table with the following data:

	Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
1	Acquisitions	Book	Not Charged	no. 3	2008	1	15151
2	Main	Book	Not Charged			1	67594
3	Main	Book	Not Charged	v. 1, no. 5	2005	1	65161
4	Acquisitions	Book	Not Charged	v. 3, no. 4 special issue	2007	1	

Below the table are tabs for "Bib Brief", "Holdings", "Item/Holdings", "Item Details", and "Item History". The "Bib Brief" tab is selected, showing the following fields:

Author:   
Edition:   
Publisher: American Psychological Association. Place/Date: [Washington] 1965  
Pub. No.:  Series:   
ISSN: 0021-843X System No.: 1039412 277900  
ISBN:  LCCN: sc 78001446  
Owning Library: Training Master DB

**Figure 5-53. Item Record After Resequencing**

### Viewing the MARC Bibliographic Record

Operators can view an item record's associated bibliographic record in MARC format in the Circulation module. Operators can also print the MARC bibliographic record.

**NOTE:**

The view of the MARC bibliographic record in the Circulation module displays and prints using the Unicode character set because MARC data is stored in the database as UTF-8 encoded, even though MARC data that appears elsewhere in the Circulation module displays in the Latin-1 character set.

The procedure for viewing an item's MARC bibliographic record is shown in [Procedure 5-18, Viewing the MARC Bibliographic Record](#).



---

**Procedure 5-18. Viewing the MARC Bibliographic Record**

---

Use the following to view an item's MARC bibliographic record:

1. After logging in to the Circulation module, click the **Item** button from the Circulation toolbar or select **Item** from the **Functions** menu.

Result: The **Search by Item Barcode** dialog box opens.

2. Search for the wanted item. See [Searching for an Item](#) on [page 3-11](#).

Result: The item record displays (see [Figure 5-54](#)).

---

The screenshot shows a window titled "Item Record" with a title field containing "urnal 'Russkoe slovo' 1895-1866". Below the title is a table with columns: Location, Item Type, Item Status, Enum, Chron, Copy, Barcode. The table is currently empty. Below the table are tabs: Bib Brief, Holdings, Item/Holdings, Item Details, and Item History. The "Bib Brief" tab is selected, showing fields for Author (Varustin, Lev Eduardovi), Edition, Publisher (Izd. Leningradskogo universiteta), Place/Date (Leningrad 1966), Pub. No., Series, ISSN, System No. (2891-73560), ISBN, LCCN, and Owning Library (Training Master DB).

---

**Figure 5-54. Item Record, Notice the Title Shows a Middle Dot Character (in the Database This is a UTF-8 Character, a Z with an Umlaut)**

---

3. Select **View MARC Bib** from the **Item** menu.

Result: The item's bibliographic record opens in MARC format (see [Figure 5-55](#)).

**NOTE:**

Users can select the font of their choice from the **Font** drop-down list used to display text in the record. Not all fonts will support the Unicode character set.

The record in [Figure 5-55](#) displays characters in the 245 field (as well as the 880 fields) in the Unicode character set. However, notice that the Item Record's title, as shown in [Figure 5-54](#), is not in the Unicode character set, but it is in Latin-1. The middle dot displays because Latin-1 is unable to display the Z with an umlaut character.

**Bibliographic Record #54797**

Font: **Arial Unicode MS** | Linkresolver | Send Record To

Bib

status	type	bib/l	enc/l	form
Leader: n	a	m	4	3

006: 007: 008: 961229s1966 su rus

Tag	Ind 1	Ind 2	Bibliographic Data
035			\$a I289173560
041	0		\$a rus
066			\$c (N)Q
100			\$6 880-01 \$a Varustin, Lev Eduardovič
245	1	0	\$6 880-02 \$a Žurnal "Russkoe slovo" \$b 1895-1866 \$d L. E. Varustin
260			\$6 880-03 \$a Leningrad \$b Izd. Leningradskogo universiteta \$c 1966
300			\$a 252 s.
880			\$6 100-01/(N \$a Варустин, Лев Эдуардович
880	1	0	\$6 245-02/(N \$0 00 \$a Журнал "Русское слово" \$b 1895-1866 \$d Л. Э. Варустин
880			\$6 260-03/(N \$a Ленинград \$b Изд. Ленинградского университета \$c 1966

Close Print

**Figure 5-55. View MARC Bib**

**OPTIONAL:**

4. Click the **Print** button to print the record if wanted.

**NOTE:**

User can customize the format in which you want the bibliographic record to print, changing heading information, font sizes and many other details. See [MARC Record Stanza](#) on [page A-39](#).

5. Click the **Close** button to close the **Bibliographic Record** dialog box.
- 

## **Http POST request - Sending the MARC Record to a Web Server**

---

User's can configure their `voyager.ini` file to allow the operator to use an http POST request to send a MARC record to a web server. If configured, a drop-down menu of web servers available to send the record to and a **Send Record To** button are active in the MARC record standard view. Sending a POST request can be done from any of the Voyager modules where a MARC record is visible.

**NOTE:**

If you are posting to WebVoyage, only bibliographic records can be posted.

See the *Voyager Technical User's Guide* for more information on configuring this feature.

The procedure for making an httpPOST request is shown in [Procedure 5-19](#), [Making an Http POST Request](#).



### **Procedure 5-19. Making an Http POST Request**

---

Use the following to make an http POST request to view the MARC record in a web server, for example in WebVoyage.

1. From the standard MARC view click the arrow in the drop-down menu listing the web servers that are configured to accept your http POST and select the correct web server (see [Figure 5-56](#)).

**Bibliographic Record #21635**

Font: Arial      Linkresolver      Send Record To

Bib      status   type   bib/l   enc/l   form

Leader: ☐ n   ☐ a   ☐ m   ☐   ☐      006:

007:      008: 920420s1949   nyu   000 1 eng

Tag	Ind 1	Ind 2	Bibliographic Data
010			\$a 49009031
035			\$a CNV02329739
040			\$d CoFS
049			\$a SHCM
050	0		\$a PZ3.C5483 \$b Tr
092			\$a F C596t
100	1		\$a Clark, Walter Van Tilburg, \$d 1909-1971.
245	1	4	\$a The track of the cat : \$b a novel / \$c by Walter Van Tilburg Clark.
260			\$a New York : \$b Random House, \$c c1949.
300			\$a 404 p. ; \$c 22 cm.

Close      Print

**Figure 5-56. MARC View with Drop-down of Web Servers**

2. Click the **Send Record To** button.

Result: The POST request is sent to the selected web server and the record displays.

### Viewing MARC Holdings

From a displayed item record you can display the item's holdings record in MARC record format. Operators can also print the MARC holdings record.

**NOTE:**

The view of the MARC holdings record in the Circulation module displays and prints using the Unicode character set.

The procedure for viewing a MARC holdings record is shown in [Procedure 5-20, Viewing the MARC Holdings Record](#).



---

**Procedure 5-20. Viewing the MARC Holdings Record**

---

Use the following to view the MARC Holdings record:

1. After logging in to the Circulation module, click the **Item** button from the Circulation toolbar or select **Item** from the **Functions** menu.

Result: The **Search by Item Barcode** dialog box opens.

2. Search for the wanted item. See [Searching for an Item](#) on [page 3-11](#).

Result: The item record displays.

3. Select **View MARC Holdings** from the **Item** menu.

Result: The item's holdings record opens in MARC format (see [Figure 5-57](#)).

---

**Holdings Record #31883**

Holdings

status	type	enc/l
Leader: <input type="text" value="c"/>	<input type="text" value="x"/>	<input type="text" value="3"/>

007:

008:

Tag	Ind 1	Ind 2	Bibliographic Data
014	1		\$a ocm05102118
852	0		\$b main \$h PS3515.E343 \$i A6 1979

---

**Figure 5-57. View MARC Holdings**

---

4. Click the **Print** button to print the record if wanted.



**NOTE:**

Users can customize the format in which you want the holdings record to print, changing heading information, font sizes and many other details. See [MARC Record Stanza](#) on [page A-39](#).

5. Click the **Close** button to close the holdings record dialog box.
- 

## **Requests in the Circulation Module**

---

Operators can place a hold, recall, call slips, remote storage, or short loan requests for an item from the Circulation module.

### **Holds**

---

Hold requests serve as requests for books that are currently charged.

Holds can be placed at the copy level (for a specific item) or title level (the first item with the title that is returned).

A notice can be printed from the Reporter module and sent to the requesting patron when the item becomes available.

Hold requests are not activated (that is, items do not register with the system as having a hold) until an item is discharged. This means that holds that are submitted on an item that is not yet selected out do not do anything. A hold submitted on an item that is not charged is **only** activated after the item has been charged and then discharged.

### **Recalls**

---

A recall is a patron request to return an item that has been charged out by another patron. Recalls can be placed at the copy level (for a specific item) or title level (the first item with the title that is returned).

If a title level recall is placed, the item that is recalled is the item with the earliest charge date. Any other items have holds placed on them. This is true whether the recall is placed by a patron via WebVoyáge or placed by a staff member via the Circulation module.

In addition, title level recalls may be placed against an item currently being held for another patron, that is item status is On Hold. This is true whether the recall is placed by a patron via WebVoyage or placed by a staff member via the Circulation module.

A Recall Notice is sent to the patron to whom the item is currently charged and includes the new due date. When the item becomes available, an Item Available Notice is printed to advise the requesting patron of the item's availability. The times when recalls can be made and when notices are sent can be modified.

See the *Voyager System Administration User's Guide* for more information about holds and recalls.

**NOTE:**

If an item that has a hold or recall is being charged or discharged, or some other action is being taken on the item, a message displays in the Circulation module warning the user about the hold or recall.

### **Call Slip Request**

---

A call slip is a request by a patron for a specific item from an area that is not open to the public (closed stacks). It can only be made by a patron for a specific item and/or title, depending on your library's policies.

No administrative requests are allowed for call slips, and no call slips are allowed without either an item or title specified. In addition, duplicate requests by the same patron are not allowed.

See the *Voyager Call Slip User's Guide* and the *Voyager System Administration User's Guide* for more information.

### **Remote Storage Request**

---

A Remote Storage request is a request by a patron for a specific item by an automated retrieval system. It must be made for a specific item.

This request is only available if your library has an automatic retrieval system, otherwise, it does not display.

This is active only if your site uses Voyager's Automated Retrieval System (ARS)/ Remote Storage extension product.

### **Short Loan Request**

---

Short Loan requests allow your patrons to place a reservation on an item for a specific time period.

For more information about Short Loans, see [Short Loans](#) on [page 10-1](#).

### **Security**

---

Depending on your security profile, you may or may not be allowed to add or update holds and recalls. Operators that have the **Add/Update Recall/Hold Requests** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to add or update holds and recalls (see [Figure 5-30 on page 5-38](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

### **Place Request Dialog Box**

---

The **Place Request** button opens the **Place Request** dialog box where operators may place requests (see [Figure 5-58](#)).

**Place Request**

**Patron Information**

Name:

Library:

Barcode:  ... X

Group:  ☐ Library Administrative Request

**Item Information**

Atlas and glossary of primary sedimentary structures, by F. J. Pettijohn and Paul Edwin Potter.  
Translations into Spanish, French, and German by Juan Carlos Riggi, Marie-Hélène Sachet, and Hans-

**Request Type:**

☒ Hold ☐ Remote Storage  
☐ Recall ☐ Short Loan  
☐ Call Slip

**Title or Copy Level:**

☒ Title: For Items At:   
☐ Copy

Pickup At:  Expires:  ...

Comment:

OK Cancel

**Figure 5-58. Place Request Dialog Box**

The **Place Request** dialog box contains a **Patron Information** section and an **Item Information** section.

[Table 5-24](#) describes the **Place Request** dialog box.

**Table 5-24. Place Request Dialog Box**

Name	Description	Required	Range
Patron Information section			
Name	Name of the patron who is placing the request.	Yes	

**Table 5-24. Place Request Dialog Box**

Name	Description	Required	Range
Barcode	Barcode of the patron placing the request.  <b>NOTE:</b> Click the ellipsis button to display the Patron Search dialog box to search for a patron barcode.	Yes	Alphanumeric
Group	Patron group of the patron placing the request.	Yes	
Library Administrative Request	Makes the request a Library Administrative Request.  Library Administrative Requests do not require a barcode and are not subject to any patron group restrictions.	No	Check box  The default is not selected.
Item Information section			
Title	Title of the item displays	Yes	
Request Type	Select one of the following request types: <ul style="list-style-type: none"> <li>• Hold</li> <li>• Recall</li> <li>• Call slip</li> <li>• Remote storage</li> <li>• Short Loan</li> </ul>	Yes, one must be selected	Radio button
Title or Copy Level	Use the Title or Copy radio button option to indicate if the system is to hold or recall a single copy or all copies linked to a title.  The availability of the Title or Copy Level options is determined by the settings configured in Voyager System Administration, Circulation - Request Configuration. (Refer to the Voyager System Administration User's Guide for more information.)	Yes, one must be selected	Radio button

**Table 5-24. Place Request Dialog Box**

Name	Description	Required	Range
For Items At	For title-level selections, the <b>For Items At</b> drop-down list displays the available request groups as defined in Voyager System Administration, Circulation - Request Groups. (Refer to the Voyager System Administration User's Guide for more information.)	Yes, if available	Drop-down
Pickup At	<p>You can specify a pickup location for both a call slip request and a remote storage request. Notice that if the item is not stored remotely, the Pickup At drop-down list box is disabled.</p> <p>The Pickup At field is only available for call slip requests if all call slip queues are set to In Transit For Hold. If one of the call slip queues is not set to In Transit For Hold, the Pickup At field does not display on the call slip request form. You can still place a call slip request, however.</p> <p>See the "Call Slip Print Groups Definitions" section of the <i>Voyager System Administration User's Guide</i> for more information about call slip print groups and how to set a group to In Transit For Hold.</p>	Yes	<p>All circulation locations are pickup locations in the Circulation module.</p> <p>The default pickup location is defined in the System Administration module's Circulation - Cluster Maintenance workspace.</p>
Expires	<p>Date the request expires.</p> <p><b>NOTE:</b> This field is disabled for is Call Slip or Remote Storage requests</p>		
Comment	Comments regarding the request.	No	Free text box.
OK button	Places the request.		Button
Cancel button	Cancels the request.		Button

## Blocked Requests

---

Whether a patron can place hold and/or recall requests is a policy decision defined in **System Administration > Circulation > Circulation - Policy Definitions > Matrix tab**. It can be configured for any combinations of patron groups and item types.

- If the patron for whom the request is being made belongs to a patron group that has not been authorized to place requests for the copy/title's item type and/or location, the system blocks the request.
- If the patron has already made a request for the title or copy, the system blocks the request.
- Recall and Call Slip requests may be blocked if the patron exceeds the recall or call slip request limit set for their patron group.
- If an item is being renewed and the renewal due date calculated precedes the item's current due date; or an item is being renewed and the renewal due date calculated is in the past, the system blocks the renewal. If either of these blocks are overridden, the user is prompted to enter what the item's renewal due date should be.

### NOTE:

Depending on your security profile, you may or may not be allowed to override item or patron blocks. See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

The procedure for placing a request is shown in [Procedure 5-21, Placing Requests](#).



### Procedure 5-21. Placing Requests

---

Use the following to place a hold, recall, call slip request or to request an item from a remote storage facility:

1. After logging in to the Circulation module, click the **Item** button from the Circulation toolbar or select **Item** from the **Functions** menu.

Result: The **Search by Item Barcode** dialog box opens.

2. Search for the wanted item. See [Searching for an Item](#) on [page 3-11](#).

Result: The item record displays.

3. Select **Place Request** from the **Item** menu or click the **Place Request** button.

Result: The **Place Request** dialog box opens (see [Figure 5-59](#)).

---

**Place Request**

Patron Information

Name:

Barcode:  ... X

Group:

☐ Library Administrative Request

Summertime in Chicago. MAIN1 copy 0

Request Type:

☒ Hold ☐ Recall ☐ Call Slip ☐ Remote Storage ☐ Short Loan

Requesting

☒ Title ☐ Copy

For Items At:

Pickup At:  Expires:

Comment:

OK Cancel

---

**Figure 5-59. Place Request Dialog Box**

4. Type or scan the patron barcode in the **Barcode** field and press Enter.
5. In the Request Type section, click:
  - a. the **Recall** option button if you are placing a recall for a charged item
  - b. the **Hold** button if you are placing a hold
  - c. the **Call Slip** button if you are submitting a call slip
  - d. the **Remote Location** button if you are requesting an item from a remote storage location (that is, an automated retrieval system).

**NOTE:**

Depending on the item's type, the item has different types of requests available to it. You can place holds and recalls on regular items, but not on short loan-type items. For regular items, the **short loan** option button is greyed out. If an item is a short loan item, the **short loan** option button is the only one available. See [Placing a Short Loan Request](#) on [page 10-9](#) for more information.



6. Click the option button for **Title** or **Copy**.

For more information about Title and Copy level holds and recalls, see [Table 5-25](#).

**Table 5-25. Title Level and Copy Level Hold/Recall Descriptions**

Level	Description
Title level recall	<p>The following occurs when a Title level recall is placed:</p> <ul style="list-style-type: none"> <li>• A recall is placed on the copy with the earliest check out date.</li> <li>• Holds are placed on the remaining copies.</li> <li>• The request may be limited to those items belonging to a specific location group limit if the location group limit is used when placing the request.</li> <li>• When the first of the copies is discharged (which activates the request), the remaining copy requests are deleted.</li> </ul>
Title level hold	<p>The following occurs when a Title level hold is placed:</p> <ul style="list-style-type: none"> <li>• A hold is placed on all the bibliographic record's copies.</li> <li>• The holds may be limited to those items belonging to a specific location group limit if the location group limit is used when placing the request.</li> <li>• When the first of the copies is discharged (which activates the request), the remaining copy requests are deleted.</li> </ul>
Copy level recall	<p>The following occurs when a Copy level recall is placed:</p> <ul style="list-style-type: none"> <li>• A recall is placed specifically on the selected copy. This may or may not result in an altered due date for the current transaction.</li> <li>• Only the requested copy may fill the user's request.</li> </ul>
Copy level hold	<p>The following occurs when a Copy level hold is placed:</p> <ul style="list-style-type: none"> <li>• A hold is placed specifically on the selected copy.</li> <li>• Only the requested copy may fill the user's request.</li> </ul>

7. Select the Pickup Location from the **Pickup At** drop-down list box.
8. Edit the request expiration date in the **Expires** field as needed if you are placing a Hold or Recall.
9. Enter any additional notes into the **Comment** field.

10. Click **OK** to submit the request and close the **Place Request** dialog box. Otherwise, click **Cancel** to close the dialog box without saving.

Result: The request is placed.

---

## Maintaining Item Requests

---

You can maintain item holds and recalls from the **Request Maintenance** dialog box. You can do the following maintenance processing.

- Cancel requests
- Edit requests (includes changing request levels, Title to Copy or Copy to Title)
- Resequence requests (ranking can be changed)

## Security

---

Depending on your security profile, you may process changes to the hold and recall queues. Operators that have the **Add/Update Recall/Holds Requests** and/or the **Resequence Recall/Hold Request Queues** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to process changes to hold and recall queues. See [Figure 5-30 on page 5-38](#).

[Procedure 5-22, Canceling Holds and Recalls](#), [Procedure 5-23, Editing Holds and Recalls](#), and [Procedure 5-24, Resequencing Holds and Recalls](#) describe which security option is required for each maintenance function.

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information about setting up security with circulation profiles.

## Request Maintenance Dialog Box

---

The **Request Maintenance** button ([Figure 5-60](#)) on the **Item Record** dialog box ([Figure 5-1](#)) opens the **Request Maintenance** dialog box ([Figure 5-61](#)).



Figure 5-60. Request Maintenance button

**Request Maintenance**

Island boy : story and pictures / by Barbara Cooney.

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Main		Book	Charged+	1	93960

Patron Name	Pickup Location	Expires	Level	Type	Items	Status	Rank
ADMINISTRATIVE	Circulation Desk	7/23/2012	T	R	1	Active	1
Matthew Phillips	Circulation Desk	8/7/2012	T	H	1	Active	2

Status Date: 7/18/2012    Item Available Notice Sent:

Created: 7/18/2012    by: demo    at: Circulation Desk

Location Group: ANY

Note:





Figure 5-61. Request Maintenance Dialog Box

See [Table 5-26](#) for a description of the **Request Maintenance** dialog box.

Table 5-26. Request Maintenance Dialog Box

Name	Description
Title	Title of the requested item.
Perm. Location	Item's permanent location.
Temp. Location	Item's temporary location.
Item Type	Item's type (for example, a book).
Item Status	Status of the item.
Copy	Item's copy number.

**Table 5-26. Request Maintenance Dialog Box**

Name	Description
Barcode	Item's unique identifier.
Patron Name	Name of the patron's placing the request.
Pickup Location	Location where the item will be picked up.
Expires	Date the request expires.
Level	Level of request. Whether the hold/recall is placed for the first available title (T), or whether it is for a specific copy (C).
Type	Level of request, hold <H> or recall <R>.
Items	Number of pending requests.
Status	Status of the request. Whether the request is active (in the queue), or whether the request is pending (item on the shelf).
Rank	Rank of the request in the queue.
Status Date	Date that the last status was applied.
Item Available Notice Sent	Date the item available notice was produced.
Created/by/at	Date that the request was created, the operator that created it and the location where it was created.
Location Group	Location that the item is from.
Note	If there were any comments added when the request was placed they appear here.
Up arrow 	Moves the selected request to the top of the queue.
Up arrow 	Moves the selected request up one in the queue.
Down arrow 	Moves the selected request down in the queue.
Down arrow 	Moves the selected request to the last in the queue.

**Table 5-26. Request Maintenance Dialog Box**

Name	Description
Edit button (Alt+E)	Displays the Edit Request dialog box for pending requests enabling you to change the following options: <ul style="list-style-type: none"><li>• Request level (from Title to Copy or Copy to Title)</li><li>• Location group (for title level requests only)</li><li>• Pickup location</li><li>• Expiration date</li><li>• Comment</li></ul>
Cancel H/R button	Cancels the selected request.
Close button	Closes the dialog box.

The procedures for maintaining requests start with [Procedure 5-22, Canceling Holds and Recalls](#).



#### **Procedure 5-22. Canceling Holds and Recalls**

Use the following to cancel holds and recalls:

1. Select an item copy from the item record display of an open item record ([Figure 5-62](#)).

The screenshot shows a software window titled "Item Record". At the top, there is a "Title" field containing "Island boy : story and pictures / by Barbara Cooney.". To the right of the title field are several icons and two numerical fields showing "2" and "0". Below the title field is a table with the following data:

	Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
1	Main	Book	Charged+			1	93960

Below the table is a large empty rectangular area. At the bottom of the window is a tabbed interface with five tabs: "Bib Brief", "Holdings", "Item/Holdings", "Item Details", and "Item History". The "Bib Brief" tab is currently selected, displaying the following information:

Author: Cooney, Barbara, 1917-  
Edition:   
Publisher: Viking Kestrel, Place/Date: New York, NY : 1988  
Pub. No.: Series:   
ISSN: System No.: ocm17550743  
ISBN: 067081743X : LCCN: 88000175 /AC  
Owning Library: Training Master DB


---

**Figure 5-62. Open Item Record**

2. Select **Request Maintenance** from the **Item** menu, or click the **Request Maintenance** button on the item record.

Result: The **Request Maintenance** dialog box opens. See [Figure 5-63](#).

**Request Maintenance**

 Island boy : story and pictures / by Barbara Cooney.

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Main		Book	Charged+	1	93960

Patron Name	Pickup Location	Expires	Level	Type	Items	Status	Rank
ADMINISTRATIVE	Circulation Desk	7/23/2012	T	R	1	Active	1
Matthew Phillips	Circulation Desk	8/7/2012	T	H	1	Active	2





  

Status Date: 7/18/2012    Item Available Notice Sent:

Created: 7/18/2012    by: demo    at: Circulation Desk

Location Group: ANY

Note:

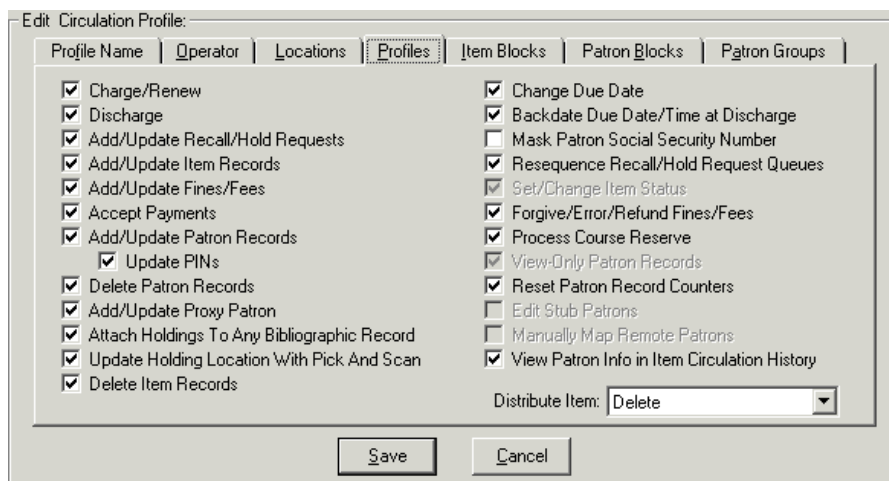





**Figure 5-63. Request Maintenance dialog box**

3. Select the hold or recall request to be canceled.

**NOTE:**

The operator must have the **Add/Update Recall/Holds Requests** security option (see [Figure 5-64](#)) selected to process cancellation requests.



**Figure 5-64. Security in Voyager System Administration for processing requests**

4. Click the **Cancel H/R** button.

Result: The hold or recall request is canceled.



### **Procedure 5-23. Editing Holds and Recalls**

---

Use the following to edit hold and recall requests:

1. Select an item copy from the item record display of an open item record ([Figure 5-65](#)).



The screenshot shows a software window titled "Item Record". At the top, there is a "Title" field containing "Island boy : story and pictures / by Barbara Cooney.". To the right of the title field are several icons and two numerical fields: "2" and "0". Below the title field is a table with the following data:

	Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
1	Main	Book	Charged+			1	93960

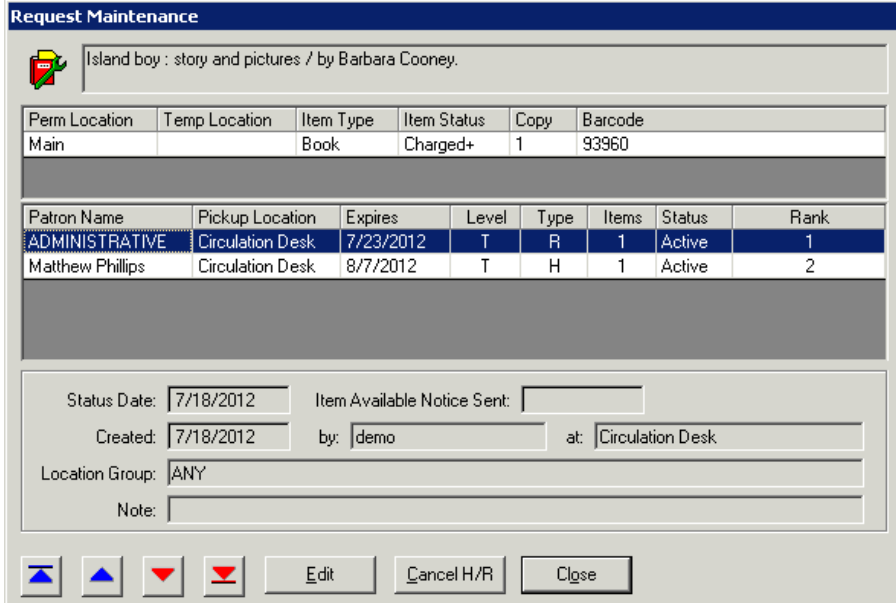
Below the table is a tabbed interface with five tabs: "Bib Brief", "Holdings", "Item/Holdings", "Item Details", and "Item History". The "Bib Brief" tab is currently selected, showing the following fields:

Author: Cooney, Barbara, 1917-  
Edition:   
Publisher: Viking Kestrel, Place/Date: New York, NY : 1988  
Pub. No.: Series:   
ISSN: System No.: ocm17550743  
ISBN: 067081743X : LCCN: 88000175 /AC  
Owning Library: Training Master DB

Figure 5-65. Open Item Record

2. Select **Request Maintenance** from the **Item** menu, or click the **Request Maintenance** button on the item record.

Result: The **Request Maintenance** dialog box opens. See [Figure 5-66](#).



The "Request Maintenance" dialog box contains the following elements:

- Title Bar:** Request Maintenance
- Item Information:** A text field with a book icon and the text "Island boy : story and pictures / by Barbara Cooney."
- Item Table:**

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Main		Book	Charged+	1	93960
- Patron Table:**

Patron Name	Pickup Location	Expires	Level	Type	Items	Status	Rank
ADMINISTRATIVE	Circulation Desk	7/23/2012	T	R	1	Active	1
Matthew Phillips	Circulation Desk	8/7/2012	T	H	1	Active	2
- Form Fields:**
  - Status Date: 7/18/2012
  - Item Available Notice Sent: (empty)
  - Created: 7/18/2012
  - by: demo
  - at: Circulation Desk
  - Location Group: ANY
  - Note: (empty)
- Buttons:** Four arrow buttons (blue up, blue down, red up, red down), Edit, Cancel H/R, and Close.

**Figure 5-66. Request Maintenance dialog box**

3. Click the **Edit** button or use **Alt+E**.

Result: The **Edit Request** dialog box opens. See [Figure 5-67](#).

**Figure 5-67. Edit Request dialog box**

**NOTE:**

The operator must have the **Add/Update Recall/Holds Requests** security option ([Figure 5-64](#)) selected in order for the **Edit** button to be active.

4. Make the changes needed.

Operators can change the following options for pending requests:

- Request level (Title to Copy or Copy to Title).

When making this change, be aware of the following:

- Changing a Copy level hold request to a Title level request makes other items available for the request (within Circulation policy rules).
- Changing a Title level hold request to a Copy level request lets you select a specific item for the request and removes any other available items.
- Changing a recall request may change which specific item is actually recalled.

For more information about Title level and Copy level hold and recall requests, see [Procedure 5-21](#), [Placing Requests](#), on page [5-83](#) and [Table 5-25](#) on [page 5-85](#).

- Location group (for title level requests only)
- Pickup location
- Expiration date
- Comment

**NOTE:**

**Patron Information** and **Request Type** (hold/recall) changes are not permitted.

5. Click **OK**.

Result: The editing changes are saved and the **Edit Request** dialog box closes.



---

#### **Procedure 5-24. Resequencing Holds and Recalls**

---

Use the following to resequence holds and recalls:

1. Select an item copy from the item record display of an open item record ([Figure 5-68](#)).

The screenshot shows a software window titled "Item Record". At the top, there is a "Title" field containing "Island boy : story and pictures / by Barbara Cooney.". To the right of the title are several icons and two numerical fields: "2" and "0". Below the title is a table with the following data:

	Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
1	Main	Book	Charged+			1	93960

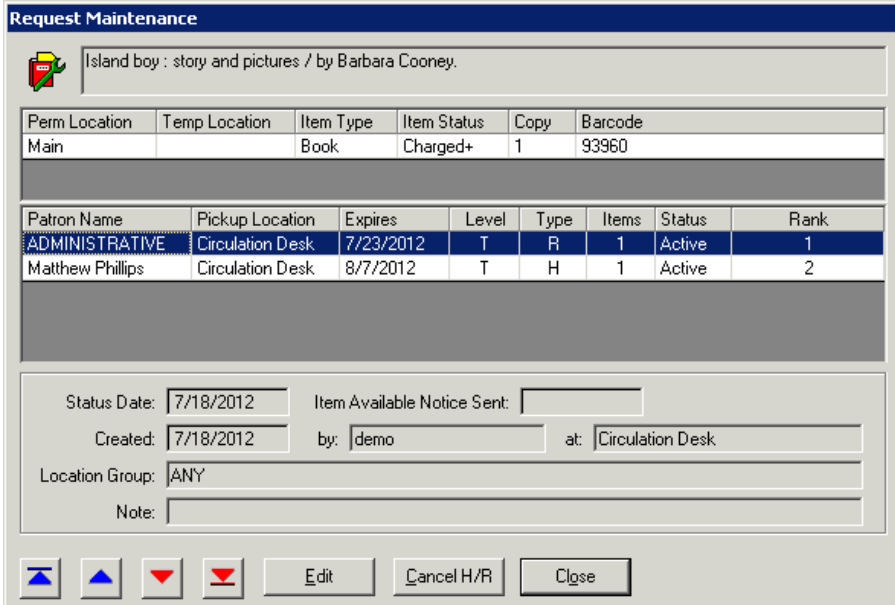
Below the table are five tabs: "Bib Brief", "Holdings", "Item/Holdings", "Item Details", and "Item History". The "Bib Brief" tab is selected, showing the following fields:

Author: Cooney, Barbara, 1917-  
Edition:   
Publisher: Viking Kestrel, Place/Date: New York, NY : 1988  
Pub. No.: Series:   
ISSN: System No.: ocm17550743  
ISBN: 067081743X : LCCN: 88000175 /AC  
Owning Library: Training Master DB

**Figure 5-68. Open Item Record**

2. Select **Request Maintenance** from the **Item** menu, or click the **Request Maintenance** button on the item record.

Result: The **Request Maintenance** dialog box opens. See [Figure 5-69](#).



The 'Request Maintenance' dialog box contains a title bar, a search field with a book icon, and two tables. The first table lists item details, and the second table lists patron details. Below the tables are input fields for dates, notices, and location groups, followed by a note field and a set of control buttons.

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Main		Book	Charged+	1	93960

Patron Name	Pickup Location	Expires	Level	Type	Items	Status	Rank
ADMINISTRATIVE	Circulation Desk	7/23/2012	T	R	1	Active	1
Matthew Phillips	Circulation Desk	8/7/2012	T	H	1	Active	2

Status Date: 7/18/2012    Item Available Notice Sent:

Created: 7/18/2012    by: demo    at: Circulation Desk

Location Group: ANY

Note:

Buttons: [Up] [Down] [Left] [Right] [Edit] [Cancel H/R] [Close]

---

**Figure 5-69. Request Maintenance dialog box**

3. Select the request to be moved, and use the arrow buttons to move them up or down.

**NOTE:**

Hold requests cannot be moved above recall requests.

**NOTE:**

The operator must have the **Resequencing Recall/Hold Request Queues** security option (see [Figure 5-64](#)) selected to process resequencing requests.

Result: The **Rank** column updates to reflect the resequencing change.

---

## OPAC Call Slip Messages

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Operators must activate the Call Slip request messages that have previously been defined and selected in the System Administration module before they display. See OPAC Configuration in the *Voyager System Administration User's Guide* for information on creating these messages.

The procedure for displaying OPAC Call Slip messages is shown in [Procedure 5-25, Displaying OPAC Call Slip messages](#).

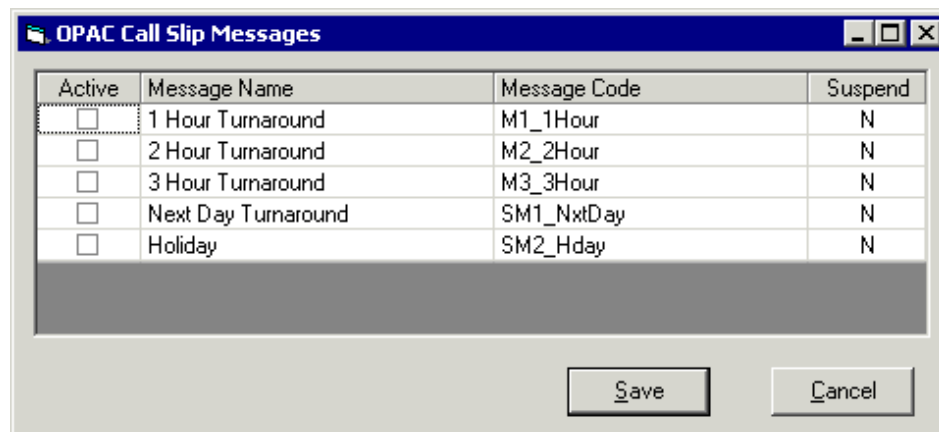


#### Procedure 5-25. Displaying OPAC Call Slip messages

Use the following to invoke Call Slip request messages:

1. After logging in to the Circulation module, select **OPAC Messages** from the **Functions** menu (**Ctrl + M**).

Result: The **OPAC Call Slip Messages** dialog box opens (see [Figure 5-70](#)).



**Figure 5-70. OPAC Call Slip Messages**

2. Click the check box in the **Active** column to select the message that is to display.
3. Click **Save** to make the selection or click **Cancel**.



#### **IMPORTANT:**

*When a Suspend message is selected, a warning message displays ([Figure 5-71](#)) as this will disable the Call Slip queues.*



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**Figure 5-71. Suspend Message Warning**

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## Charge and Renew Function

# 6

---

### Introduction

The **Charge** workspace ([Figure 6-1](#)) allows operators to perform the following tasks:

- Charge and renew items
- View a list of items currently charged to a patron
- Search for, access, and verify item information
- Create new bibliographic, holdings, and item records
- Search for, access, and verify patron record information
- Create new patron records
- View patron requests
- Print charge receipts
- Manually modify due dates
- Use Offline Circulation

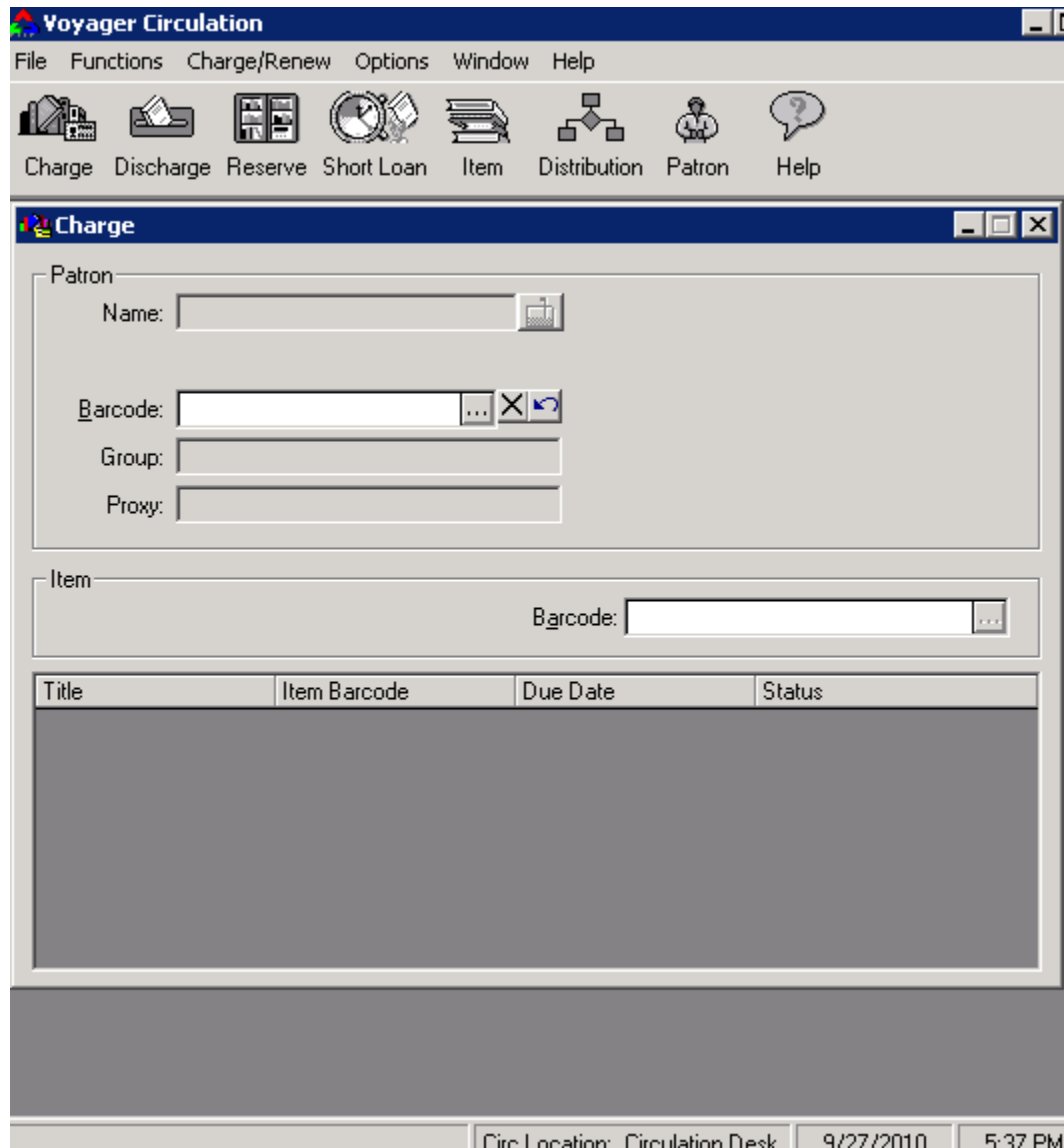


Figure 6-1. Charge Workspace

## Purpose of this Chapter

This chapter discusses the following:

- Security needed to complete various tasks in the **Charge** workspace
- Information about the **Charge** workspace
- Performing tasks in the **Charge** workspace including the following:
  - Charging and renewing items
  - Charging items to a proxy patron
  - Modifying due dates
- Offline Circulation functioning

## Security

Depending on your security profile, you may be allowed to charge or renew items. Operators that have the **Charge/Renew** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to charge and renew items (see [Figure 6-2](#)).



**Figure 6-2. Charge/Renew on the Profiles Tab**

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

## The Charge Workspace

The **Charge** workspace ([Figure 6-3](#)) has the following sections:

- Patron
- Item
- Detail (bottom) that contains information regarding current charge or renew activity

**NOTE:**

MARC information that displays in the **Charge** workspace is in the Latin-1 character set.

The screenshot shows the 'Charge' workspace interface. It has a title bar 'Charge' and a standard Windows window layout. The interface is divided into two main sections: 'Patron' and 'Item'.

**Patron Section:**

- Name:** Caryl Kent
- Barcode:** 2644
- Group:** Faculty
- Proxy:** (empty)

To the right of the input fields are several icons and numerical values:

- Icon of a person: 0
- Icon of a book: 10
- Icon of a dollar sign: \$0.00
- Icon of a book with a red tag: 0/4
- Icon of a clock: 0
- Icon of a document: 0
- Icon of a book with a red tag: 0

**Item Section:**

- Barcode:** (empty)







**Table:**

Title	Item Barcode	Due Date	Status
Harry Potter and the chamber of secrets / [music by John Williams] ; arranged by Bill Galliford, Ethan Neuburg, and Tod Edmondson.	6665381690	10/27/2010 11:56 PM	C
Harry Potter and the prisoner of Azkaban / by J.K. Rowling.	6664581682	11/7/2010 02:30 AM	R
Harry Potter and the sorcerer's stone / by J.K. Rowling ; illustrations by Mary GrandPré.	6664481681	11/7/2010 02:30 AM	R
Harry Potter and the Half-Blood Prince / by J.K. Rowling ; illustrations by Mary GrandPré.	6664381680	11/17/2010 11:56 PM	R







**Figure 6-3. Charge Workspace with Detail**

[Table 6-1](#) describes the **Charge** workspace.

**Table 6-1. Charge Workspace**

Field Name	Description
<b>Patron Section</b> of the <b>Charge</b> workspace	
Patron Name	Name of the patron who is charging the item.
E-mail button 	Opens up a new e-mail message to send to the patron. Active if there is a valid e-mail address in the patron's record. See <a href="#">E-mailing from the Circulation Module</a> on <a href="#">page 4-154</a> .
Barcode	Barcode of the patron who is charging the item. Click the ellipses to access the Patron Search dialog box if needed.  Click the clear button to clear all fields for a new patron barcode entry.  Click the refresh button to continue work on the same patron barcode when charge activity is interrupted with other outstanding issues for the patron such as when you click cancel on an override screen but the patron barcode remains on the screen.  See <a href="#">Searching for a Patron Record</a> on <a href="#">page 3-2</a> .
Group	Name of the patron group to which this patron belongs.
Proxy	Name of the proxy patron. See <a href="#">Charging Items using a Proxy Patron</a> on <a href="#">page 6-14</a> .
Proxy Patron button 	Opens the Proxy Patron To dialog box. See <a href="#">Creating Proxy Patrons</a> on <a href="#">page 4-145</a> . The number beneath the button indicates how many patrons for whom the current patron acts as a proxy.
Charged Items button 	Opens the Charged Items Index dialog box, showing the items the patron has charged. See <a href="#">Charged Items Index</a> on <a href="#">page 4-74</a> . The number beneath the button indicates the number of items the patron currently has charged.

**Table 6-1. Charge Workspace**

Field Name	Description
Fines/Fees button 	<p>Opens the Patron Fines/Fees dialog box, displaying current and historical fine and fee information, and demerits. See <a href="#">Patron Fines/Fees</a> on <a href="#">page 4-86</a>.</p> <p>The number under the button is the total amount of fines/fees currently assessed to the patron.</p>
Request Information button 	<p>Opens the Patron Request Information dialog box, Holds and Recalls tab, providing information on the patron's holds and recalls. See <a href="#">Holds and Recalls Tab</a> on <a href="#">page 4-108</a>.</p> <p>The number under the button is the number of requests the patron has placed.</p>
Short Loan Request information button 	<p>Opens the Patron Request Information dialog box, Short Loans tab, displaying information on the patron's short loan requests. See <a href="#">Short Loan Maintenance</a> on <a href="#">page 10-16</a>.</p> <p>The number under the button is the number of short loan requests the patron has placed.</p>
Call slips button 	<p>Opens the Patron Request Information dialog box, Call Slips tab, displaying information on the patron's call slips. See <a href="#">Patron Call Slips</a> on <a href="#">page 4-115</a>.</p> <p>The number under the button is the number of call slip requests the patron has placed.</p>
Notes button 	<p>Opens the Notes dialog box. Operators can add a note to this patron's record if wanted. See <a href="#">Notes Dialog Box</a> on <a href="#">page 4-127</a>.</p> <p>The number under the button indicate the number of notes associated with this patron's record.</p>
Receipt button 	<p>Prints a slip that lists the due dates for all charged items in the list.</p> <p><b>NOTE:</b> This button only displays when the <b>All Charges in One Receipt</b> option is selected in Session Preferences.</p>
<b>Item Section of the Charge workspace</b>	
Barcode	<p>Barcode of the item you want to charge.</p> <p>Click the ellipses to access the Search dialog box if needed. See <a href="#">Searching for an Item</a> on <a href="#">page 3-11</a>.</p>
<b>Current Charge Activity Section of the Charge workspace</b>	
Title column	Title of the item just charged.

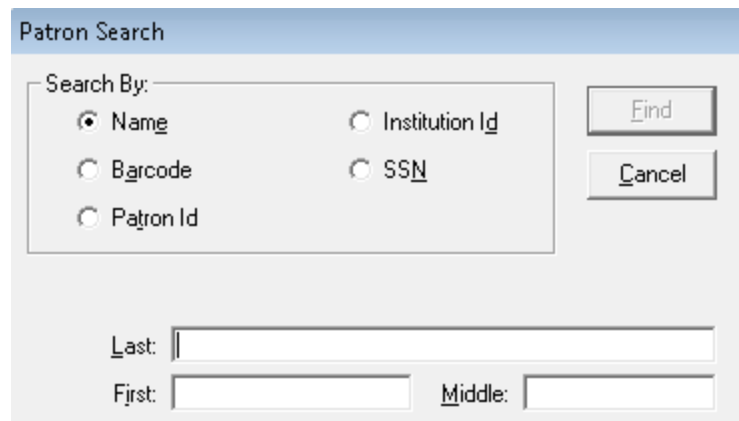
**Table 6-1. Charge Workspace**

Field Name	Description
Item barcode column	Barcode of the item just charged.
Due Date column	Due date and time of the item just charged.
Status column	Status of the item charged, C for charged, R for renewed.

### Patron Search

---

If the operator does not have a patron barcode, he or she may click the ellipses in the **Barcode** field to access the **Patron Search** dialog box (see [Figure 6-4](#)).



The image shows a 'Patron Search' dialog box. It has a title bar 'Patron Search'. Inside, there is a 'Search By:' section with five radio buttons: 'Name' (selected), 'Barcode', 'Patron Id', 'Institution Id', and 'SSN'. To the right of these are two buttons: 'Find' and 'Cancel'. Below the search options are three text input fields labeled 'Last:', 'First:', and 'Middle:'.

**Figure 6-4. Patron Search Dialog Box**

They can then conduct a search for the patron. See [Searching for a Patron Record](#) on [page 3-2](#) for additional information.

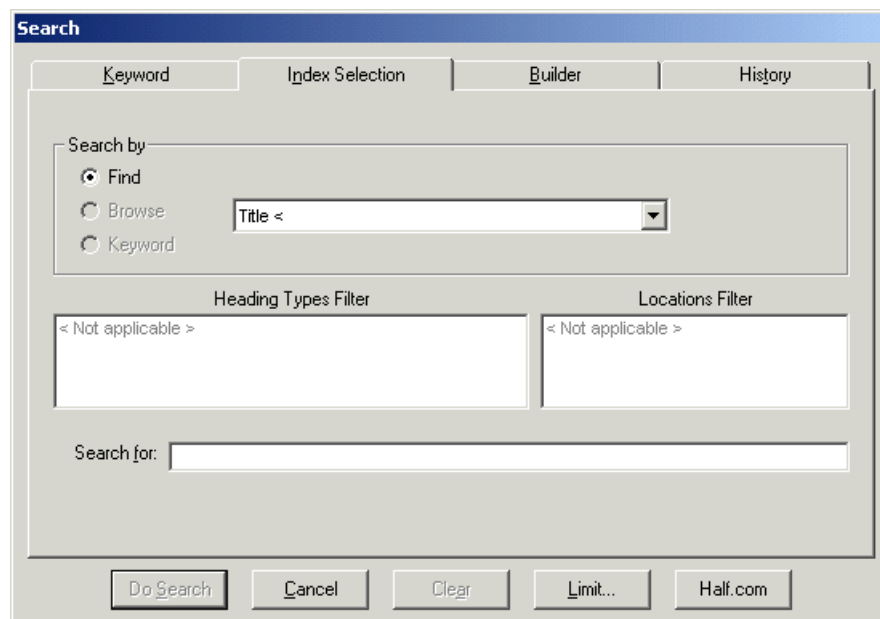
### Item Search

---

If the operator does not have an item barcode, he or she may click the ellipses in the **Barcode** field to access the **[Item] Search** dialog box (see [Figure 6-5](#)).

**NOTE:**

The **Search** dialog box allows operators to input search terms in the Unicode character set.



---

**Figure 6-5. Search Dialog Box**

See [Searching for an Item](#) on [page 3-11](#) for additional information on searching for items in the Circulation module.

## Charging Items

---

Operators charge items to patrons in the **Charge** workspace. Circulation operators must provide patron information, that is who wants to charge the item, and item information, that is what specific item is being charged.



### **IMPORTANT:**

*Once patron information is accessed, operators must provide the item information within the user-defined period of time before the Charge workspace closes. See [Configuring the voyager.ini file for Charge time-out](#) on [page 1-6](#).*



The system takes the patron and item information and applies the appropriate Circulation Matrix to determine the loan information. See [Overview of the Circulation Process](#) on [page 2-2](#). Also see *Circulation Policy Matrix* in the *Voyager System Administration User's Guide* for information on the Circulation Matrix and calculating loan periods.

The system also checks to see if there is any reason, due to the patron or the item, that this circulation transaction should be blocked. If so, the appropriate blocking message displays. Operators with the proper authority can override blocks. See [Overriding Blocks](#) on [page 9-14](#).

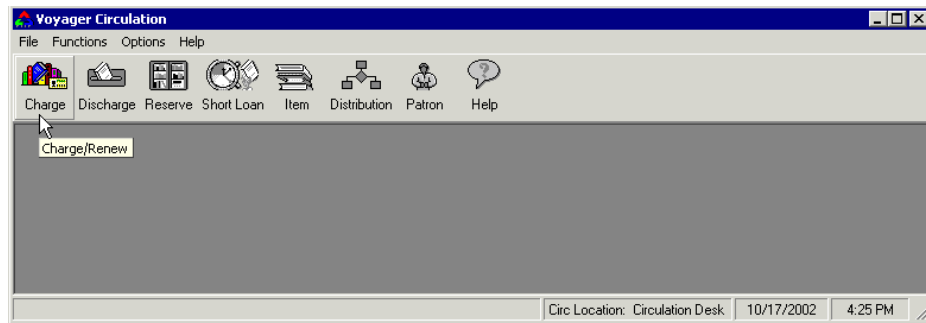
Also, if wanted, operators with the proper authority may modify the due date. See [Modifying Due Dates](#) on [page 6-18](#).



### Procedure 6-1. Charging Items

Use the following to charge items:

1. After logging in to the Circulation module, click the **Charge** button (see [Figure 6-6](#)) from the Circulation toolbar or select **Charge/Renew** from the **Functions** menu.



**Figure 6-6. Charge Button**

Result: The **Charge** workspace opens.

2. Use the following to submit Patron information:
  - a. Enter the patron's barcode into the **Barcode** field and then click **Enter**.
  - b. Scan the patron's barcode into the **Barcode** field.

- c. Click the ellipses button, which opens the **Patron Search** dialog box, or select **Patron> Search for Patron** from the **Charge/Renew** menu to search for a patron by Name, Institution ID or Social Security Number.

Result: The patron's information populates the fields in the **Patron** section of the **Charge** workspace. The patron's name displays in the **Name** field and the patron's patron group displays in the **Group** field.

**NOTE:**

Click the clear button next to the **Barcode** field (see [Table 6-1](#) on [page 6-5](#)) to clear the charge dialog box to enter a different patron barcode.

3. Use the following to submit item information:
  - a. Enter the item's barcode into the **Barcode** field and then click **Enter**.
  - b. Scan the item's barcode into the **Barcode** field.
  - c. Click the ellipses button, which opens the **Search** dialog box, or select **Item> Item Headings/Keyword Search** from the **Charge/Renew** menu to search for an item. The item is automatically charged to the patron when you select the title from the search results.

Result: Barring any patron or item blocks, the items is charged to the patron. The bottom half of the **Charge** workspace contains the title, item barcode, due date, and status (**C** for charged, **R** for renewed) displays in the title list below with the last item charged first in the list.

**NOTE:**

If an item has a status of Lost, Missing, Withdrawn, or Claims Returned, the status can be reset when the item is charged if the current operator has the proper authority. See [Overriding Item Blocks](#) on [page 9-19](#).

4. After the charge is complete, the cursor returns to the **Barcode** field on the **Item** section. At this time, you may perform any of the following options:
  - a. Enter another item barcode to charge another item if wanted. You can continue to charge out items until all the items are charged out for the patron or until you reach the maximum number of charges allowed for that patron group. This is defined in the System Administration module.
  - b. Do nothing and the system will close the **Charge** workspace after a user-defined amount of time. See [Configuring the voyager.ini file for Charge time-out](#) on [page 1-6](#).
  - c. To clear the display right-click and select **Clear Display**, or select **Clear Display** from the **Charge/Renew** menu.

Result: The item is charged to the patron.

**NOTE:**

If you selected **Per Single Charge** in Session Preferences (see [Table 13-2](#) on [page 13-5](#)), the slips are generated as soon as the item displays on the list. You can customize the printing format for the due date slip. For example, you can change heading information, font sizes and other details. See [Due Date Slip Stanza](#) on [page A-4](#) for more information.

5. If you selected **All Charges in One Receipt** in Session Preferences (see [Table 13-2](#) on [page 13-5](#)), click the Receipt button if you want to print a slip that lists the due dates for all charged items in the list.
  6. When you are finished charging, close the **Charge** workspace by selecting **Close** from the **File** menu.
- 

## **Renewing Items**

---

Items may be renewed from within the Circulation module by a circulation operator. They can be renewed by following the charge procedure or by using the **Charged Items Index** dialog box. Also, the patron may renew items with WebVoyage if it is allowed by the institution.

Patrons can renew any and all of their charged items if the number of charged items is less than or equal to the **Maximum Items Borrowed limit** for their Circulation Policy Group.

If the number of charged items exceeds the **Maximum Items Borrowed limit** for their Circulation Policy Group, they are blocked. In order to renew the item in a block situation, the Circulation operator must override the block. During block situations, the patron is not able to renew items using WebVoyage because the renewal requires an override.

For more information on the **Maximum Items Borrowed limit**, see *Patrons Tab and Patron Rules Dialog Box* in the *Voyager System Administration User's Guide*.

Operators can renew items using the same procedure that they use to charge items. For more information, see [Procedure 6-1](#), [Charging Items](#), on page [6-9](#). The only difference is that the renewed item is identified in the bottom half of the **Charge** workspace with an **R** in the status column.

Operators may also renew items from the **Charged Items Index** dialog box.



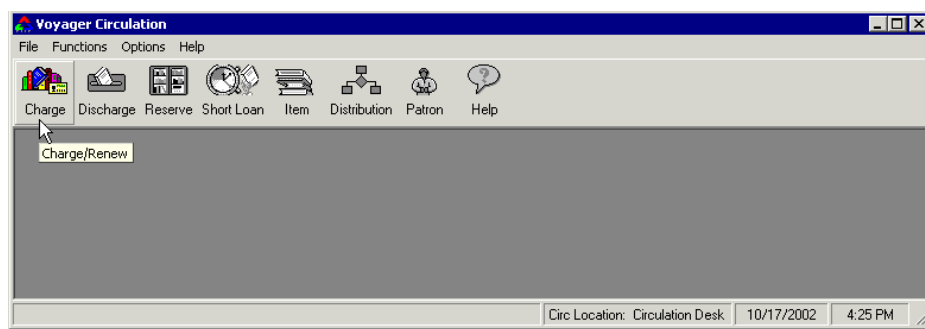
---

**Procedure 6-2. Renewing Charged Items from the Charged Items Index**

---

Use the following to renew charged items from the **Charged Items Index** dialog box:

1. After logging in to the Circulation module, click the **Charge** button (see [Figure 6-7](#)) from the Circulation toolbar or select **Charge/Renew** from the **Functions** menu.



---

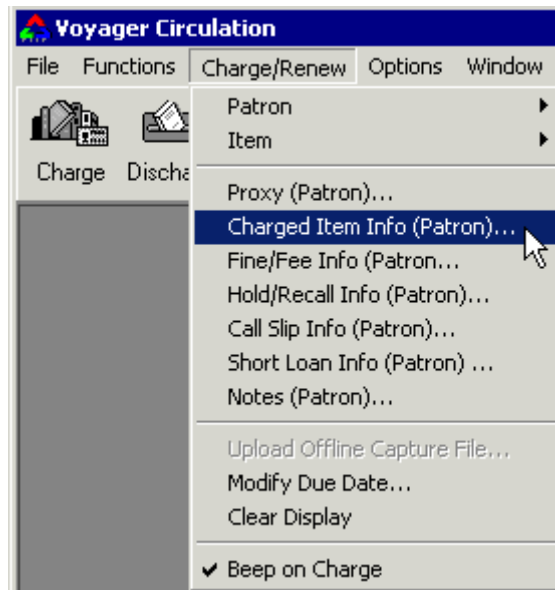
**Figure 6-7. Charge Button**

Result: The **Charge** workspace opens.

2. Enter or scan the patron's barcode in the **Barcode** field and press **Enter**.

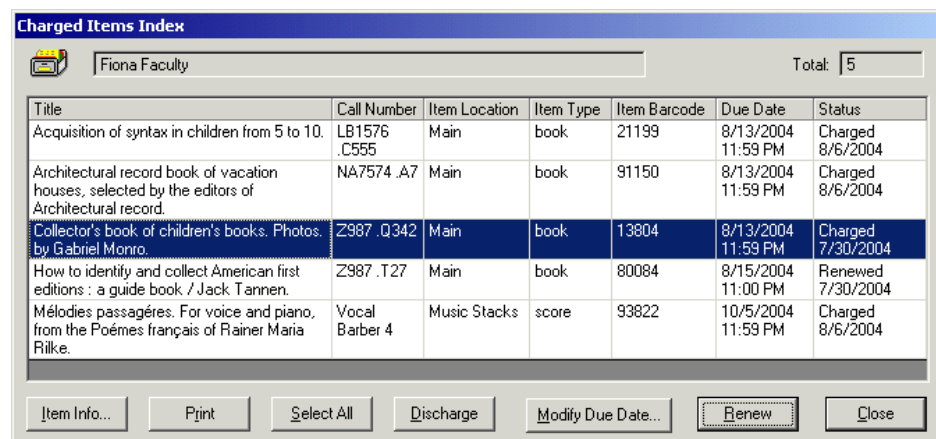
Result: The patron's information populates the fields in the **Patron** section of the **Charge** workspace.

3. Click the **Charged Items** button, or select **Charged Item Info (Patron)** from the **Charge/Renew** menu (see [Figure 6-8](#)).



**Figure 6-8. Charged Item Info (Patron) Menu Option**

Result: The **Charged Items Index** dialog box opens (see [Figure 6-9](#)).

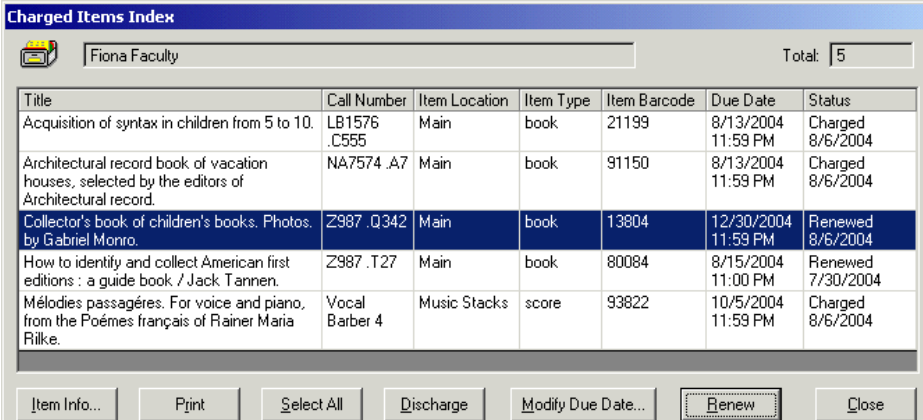


**Figure 6-9. Charged Items Index Dialog Box**

4. Select the item(s) in the index to be renewed.

5. Click the **Renew** button.

Result: The item is renewed. The **Status** column indicates that the item was successfully renewed and the new due date displays in the **Due Date** column (see [Figure 6-10](#)).



The screenshot shows a dialog box titled "Charged Items Index". At the top, there is a text field containing "Fiona Faculty" and a "Total: 5" label. Below this is a table with the following columns: Title, Call Number, Item Location, Item Type, Item Barcode, Due Date, and Status. The table contains five rows of data. The third row, "Collector's book of children's books. Photos. by Gabriel Monro.", is highlighted in blue. Below the table is a row of buttons: "Item Info...", "Print", "Select All", "Discharge", "Modify Due Date...", "Renew", and "Close".

Title	Call Number	Item Location	Item Type	Item Barcode	Due Date	Status
Acquisition of syntax in children from 5 to 10.	LB1576 .C555	Main	book	21199	8/13/2004 11:59 PM	Charged 8/6/2004
Architectural record book of vacation houses, selected by the editors of Architectural record.	NA7574 .A7	Main	book	91150	8/13/2004 11:59 PM	Charged 8/6/2004
Collector's book of children's books. Photos. by Gabriel Monro.	Z987 .Q342	Main	book	13804	12/30/2004 11:59 PM	Renewed 8/6/2004
How to identify and collect American first editions : a guide book / Jack Tannen.	Z987 .T27	Main	book	80084	8/15/2004 11:00 PM	Renewed 7/30/2004
Mélodies passagères. For voice and piano, from the Poèmes français of Rainer Maria Rilke.	Vocal Barber 4	Music Stacks	score	93822	10/5/2004 11:59 PM	Charged 8/6/2004

**Figure 6-10. Charged Items Index after Renewing the First Item in the List**

6. Click the **Close** button to close the **Charged Items Index** dialog box and return to the **Charge** workspace.

**NOTE:**

Items charged by term can, within a specified lead (buffer) time, be renewed to the next available terms end date. End of Term dates and Lead Days are defined in a particular Circulation Calendar and Renewal Periods are defined in the Circulation Matrix Definitions for a particular patron group and item type. See the *Voyager System Administration User's Guide* for more information.

---

## Charging Items using a Proxy Patron

If a patron is acting as a proxy to another patron (a sponsor patron), he or she may charge items for that sponsor patron. The circulation operator specifies that the item is charged out to the sponsor's barcode. The **Charged To** information for the item includes the name of the proxy patron who initiated the charge.



### Procedure 6-3. Charging Items using a Proxy Patron

Use the following to charge items to a Proxy Patron.

1. After logging in to the Circulation module, click the **Charge** button from the Circulation toolbar or select **Charge/Renew** from the **Functions** menu.

Result: The **Charge** workspace opens.

2. Enter or scan the Proxy Patron's barcode in the **Barcode** field and press **Enter**.

Result: The Proxy patron's information populates the fields in the **Patron** section of the **Charge** workspace. See [Figure 6-11](#).

The screenshot shows the 'Charge' workspace with the following fields and icons:

- Patron Section:**
  - Name: Caryn Kent
  - Barcode: 2644
  - Group: Faculty
  - Proxy: (empty field)
- Icons and Values:**
  - Icon 1: Person with ID card, value 1
  - Icon 2: Bookshelf, value 7
  - Icon 3: Dollar sign, value \$0.00
  - Icon 4: Book with tag, value 0/4
  - Icon 5: Wheelchair, value 0
  - Icon 6: Document with pencil, value 0
  - Icon 7: Book with tag, value 0
- Item Section:**
  - Barcode: (empty field)

Figure 6-11. Proxy Barcode Entered

3. Click the **Proxy Patron** button on the **Charge** workspace.

Result: The **Proxy Patron To** dialog box opens (see [Figure 6-12](#)).

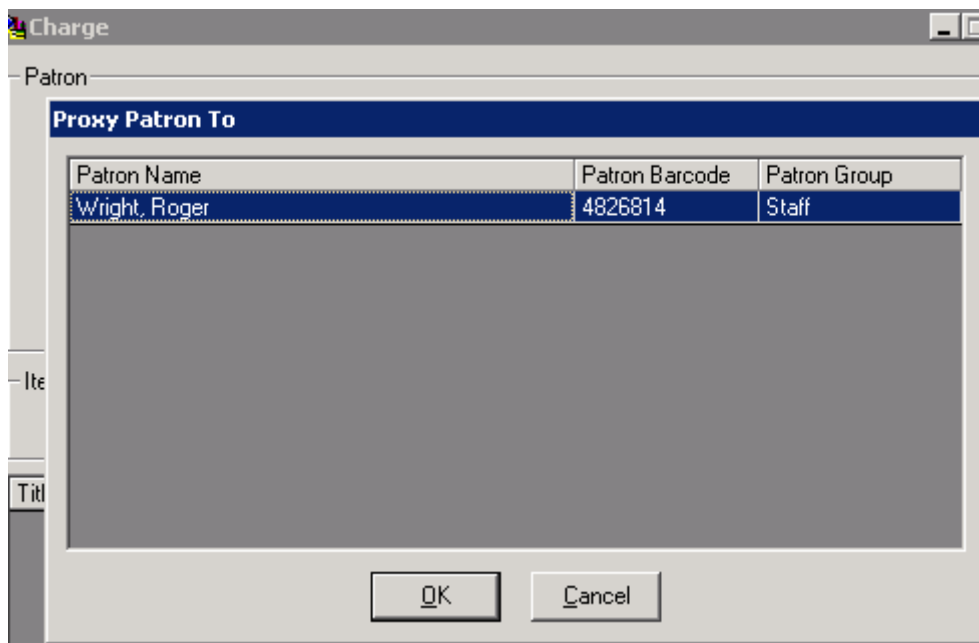


Figure 6-12. Proxy Patron To

**NOTE:**

To facilitate easier identification and access to relevant information, you can sort all display columns in Voyager Circulation. If the **Proxy Patron To** dialog box lists more than one patron, click of the column header, such as Patron Name, to organize the display in ascending or descending sort order by patron name; a second click of the same header reverses the sort by patron name.

4. Select the sponsor patron from the list and click the **OK** button. This sponsor's barcode is now used for this transaction.



**IMPORTANT:**

*If you click **OK** without selecting a sponsor patron, the first sponsor on the list is chosen by default.*

Result: The **Charge** workspace now contains the sponsor patron information. The name, barcode, and patron group of the sponsor selected from the list in the **Proxy Patron To** dialog box now appear in the **Name**, **Barcode** and **Group** fields, respectively, and the name of the patron who initiated the charge now displays in the **Proxy** field (see [Figure 6-13](#)).



**Charge**

Patron

Name:

Barcode:

Group:

Proxy:

Item

Barcode:

**Figure 6-13. Proxy Field Displayed**

You are now ready to charge the item to the sponsor patron.

5. Use the following to submit item information:
  - a. Enter the item's barcode into the **Barcode** field and then press **Enter**.
  - b. Scan the item's barcode into the **Barcode** field.
  - c. Click the ellipses button, which opens the **Search** dialog box, or select **Item>Item Headings/Keyword Search** from the **Charge/Renew** menu to search for an item. The item is automatically charged to the sponsor patron when you select the title from the search results.

Result: Barring any patron or item blocks, the item is charged to the sponsor patron. The bottom half of the **Charge** workspace contains the title, item barcode, due date, and status (**C** for charged, **R** for renewed) which displays in the title list below with the last item charged first in the list.

6. After the charge is complete, the cursor returns to the **Barcode** field on the **Item** section. At this time, you can perform the following options:
  - a. Enter another item barcode to charge another item if wanted. You can continue to charge out items until all the items are charged out for the patron or until you reach the maximum number of charges allowed for that patron group. The maximum number of charges is defined in the System Administration module.

- b. Do nothing and the system will close the **Charge** workspace after a user-defined amount of time. See [Configuring the voyager.ini file for Charge time-out](#) on [page 1-6](#).
- c. To clear the display right-click and select **Clear Display**, or select **Clear Display** from the **Charge/Renew** menu.

Result: The item is charged to the sponsor patron.

7. When you are finished charging, close the **Charge** workspace by selecting **Close** from the **File** menu.

---

## Modifying Due Dates

Circulation operators with the proper authority may modify the due date of a charged item. That is, after the system calculates a due date, the operator may manually enter a different due date.

---

### Security

Operators that have the **Change Due Date** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to modify due dates (see [Figure 6-2 on page 6-3](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.



#### **IMPORTANT:**

*In order to change the due date, the charged item must still be displayed in the list on the bottom half of the **Charge** workspace with an item status of C displayed.*



---

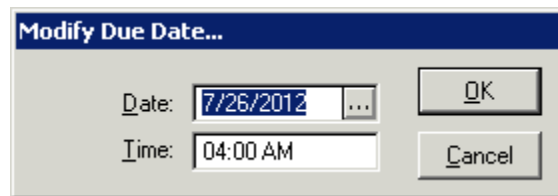
### Procedure 6-4. Modifying a Due Date

Use the following to modify a due date from the Charge workspace. If you want to modify the due date at a later time, see [Procedure 4-12, Modifying a Due Date from the Charged Items Index Dialog Box](#).

1. From the **Charge** workspace select all of the items to which you want to assign a new due date. If you are assigning different due dates, select each item separately.

2. Select **Modify Due Date** from the **Charge/Renew** menu (or right-click the charged item and select **Modify Due Date**).

Result: The **Modify Due Date** dialog box opens with the current due date and time in their respective fields (see [Figure 6-14](#)).

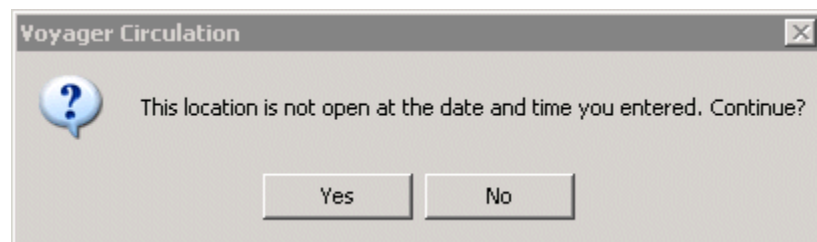


**Figure 6-14. Modify Due Date Dialog Box**

3. Enter the new due date in the **Date** field. You can enter the date manually or click the ellipses button to display a **Calendar** dialog box to select a date.
4. Enter the time when the items are due in the **Time** field.
5. Click **OK** to save your changes and close the **Modify Due Date** dialog box or click **Cancel** to close without saving your changes.

Result: If **OK** is clicked, the item is listed in the bottom half of the **Charge** workspace and the new due date displays.

If the new due date and time are outside of the normal calendar for the circulation location, the system will display the following message:



**Figure 6-15. Due Date Message Dialog Box**

Click **Yes** to save your changes to the due date. Otherwise, click **No** to cancel your changes to the due date.

**NOTE:**

If you are printing due date slips, another due date slip prints with the modified due date.

---

## **Pasting Barcodes into the Charge Workspace**

---

The Paste Barcode function allows the user to paste the last value stored on the clipboard into the Charge workspace. Depending on which paste option the user chooses, the application places the barcode in either the Item Barcode Field or the Patron Barcode field.

**NOTE:**

The user must enter a patron barcode before pasting an item barcode.

To paste the barcode into the Patron Barcode field, use any of the following methods:

- Type the control sequence (**Ctrl + T**).
- Select **Paste Barcode** from the **Charge/Renew>Patron** submenu.
- Select **Paste Barcode** from the right-click menu on the Patron section of the Charge workspace.
- Type the accelerator key (**Alt + c, p, t**)

To paste the barcode into the Item Barcode field, use any of the following methods:

- Type the control sequence (**Ctrl + A**).
- Select **Paste Barcode** from the **Charge/Renew>Item** submenu.
- Select **Paste Barcode** from the right-click menu on the Item section of the Charge workspace.
- Type the accelerator key (**Alt + c, i, t**)

**NOTE:**

Since the clipboard only holds one piece of data, subsequent copies by any copy command that places data on the clipboard (such as **Ctrl + C**) overwrites the data. For more information on copying barcodes, see [Copying Barcodes from the Item Record](#) on [page 5-29](#) and [Copying Barcodes from the Patron Record](#) on [page 4-54](#).

## Additional Activities from the Charge Workspace

In addition to charging and renewing items, operators are able to access other parts of the circulation module to perform additional activities.

### Clear Display


Operators can clear the **Charge/Renew** dialog box of existing information by selecting **Clear Display** from the **Charge/Renew** menu (or you can right-click and select **Clear Display** from the submenu).

### Beep on Charge

If you want the system to beep when you charge out an item, select **Beep on Charge** from the **Charge/Renew** menu.

### Viewing Charged Item Information

The **Charged Item Index** dialog box (Figure 6-16) lists all items charged to the current patron. The index includes item information such as title, item location, item barcode, due date, and status.

Charged Items Index				
 <input type="text" value="Mr. D Sellers"/>				
Title	Call Number	Item Location	Item Type	Item Barcode
Bark canoes and skin boats of North America [by] Edwin Tappan Adney and Howard I. Chapelle.	Q11 .U6 no. 230	Main Stacks	BOOK	83241
Studies in literature / by Sir Arthur Quiller-Couch.	820.4 Q6s	Main Stacks	BOOK	90918

**Figure 6-16. Charged Items Index Dialog Box**

Operators can print, discharge, renew, and view item information (see Fig...) from this dialog box.

Item 50700 for holding 45488

Title: Actual government as applied under American conditions / by Albert Bushnell Hart.

Location: Main Call #: 353 H25

Barcode: 07212 Temp. Loc.: [dropdown]

Perm. Loc.: Main Temp. Type: [dropdown]

Item Type: Book Media Type: [dropdown]

Enym: [text box]

Chron: [text box]

Year: [text box]

Caption: [text box]

Free text: [text box]

Spine: [text box]

Copy: 0 Pieces: 1 Price: 0.00

Self Check  
☐ Magnetic Media ☒ Sensitize

Close

---

**Figure 6-17. Example of Item Info view**

For more information, see [Charged Items Index](#) on [page 4-74](#).

---

## Adding a New Patron Record

Operators can access the **Add New Patron Record** dialog box ([Figure 6-18](#)) to add patron records by selecting **Patron** from the **Charge/Renew** menu and then selecting **Add New Patron**.

**Add New Patron Record**

Name   Details   Barcode   Address   Phone

Last:

First:

Middle:

Title:

Name Type: Personal

Institution Id:

SSN:

Patron Record

<New Patron>

Save   Delete

**Figure 6-18. Add New Patron Dialog Box**

See [Creating a Patron Record](#) on [page 4-19](#) for more information.

### **Adding New Bib Information to an Item**

Operators can quickly add basic bibliographic, holdings, and item records on-the-fly for an item that is being charged out. Once an item has been loaded into the **Charge** workspace, operators can access the **Add Bib/Item** dialog box ([Figure 6-19](#)) by selecting **Item** from the **Charge/Renew** menu and then selecting **Add New Bib/Item**.

The screenshot shows a software window titled "Add Bib/Item". It has three tabs: "Bib", "Holdings", and "Item". The "Bib" tab is active. Inside the "Bib" tab, there are several input fields and dropdown menus. At the top, there's a "Template:" dropdown menu with "Book" selected. Below it is a "Date:" text box with "2000". Then a "Place:" dropdown menu with "No place, unknown, or undetermined". Below that is a "Language:" dropdown menu with "English". Further down are "ISBN:" and "OCLC Number:" text boxes. Below those are "Author:", "Title:", and "Series:" text boxes. Then "Edition:" and "Pub Number:" text boxes. Below those are "Place:" and "Publisher:" text boxes. At the bottom is an "LCCN:" text box. At the very bottom of the dialog are "OK" and "Cancel" buttons.

---

**Figure 6-19. Add Bib/Item Dialog Box**

See [Adding Bibliographic, Holdings, and Item Records](#) on [page 5-37](#) for more information.

## **Viewing Patron Request Information**

---

You can view Patron Request Information from the patron record while in the Charge/Renew function. The **Patron Request Information** dialog box contains information about holds, recalls, call slips, and short loans.

If you select **Hold/Recall Info**, **Short Loan Info**, or **Call Slip Info** from the **Charge/Renew** menu or click any of the corresponding buttons, the **Patron Request Information** dialog box opens and defaults to that particular information tab.

See [Patron Request Information](#) on [page 4-106](#), [Holds and Recalls Tab](#) on [page 4-108](#), [Patron Call Slips](#) on [page 4-115](#), and [Short Loan Maintenance](#) on [page 10-16](#) for more information.



## Alerts at Charge

When charging an item (if configured in Voyager System Administration), the circulation operator can receive an alert that either the patron has outstanding fines/fees/demerits and/or that the patron's requested item is available. In the **Charge** workspace, the alert displays just before entering the item barcode. By comparison, from the **Patron** workspace, the alert displays when the patron record opens.

Circulation Session Preferences may be used to identify if alerts display (after being configured in Voyager System Administration). See [Alerts, Printing, and Fines/Fees/Demerits](#) on [page 13-2](#) for more information.

These messages are reported in a **Circulation Alerts** dialog box as shown in [Figure 6-20](#). In the [Figure 6-20](#) example, you must click the **OK** button to acknowledge the alert and continue with the charge process. Some alerts such as the Loan Shortened Due to Patron Expiration Alert provide the option to click **Cancel** which cancels the charge transaction.



**Figure 6-20. Example of a Circulation Alert for Circulation Clerk**

For information on configuring alerts, see *Circulation Alerts at Discharge and Charge* in the *Voyager System Administration User's Guide*.

## Offline Charge

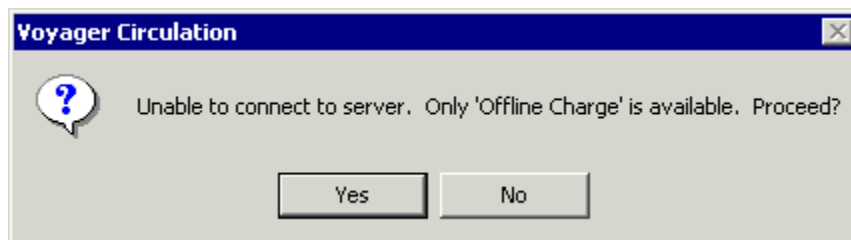
Sites can use offline charge or renew items even when they do not have a connection to their Voyager database on the server.

The following circulation activities can be performed offline:

- create a capture file (or multiple files) of patron and item barcodes on the local computer,
- upload that file when a connection is re-established

- create a report file with information about the offline transactions.

When a server connection cannot be made a message asking the operator if they want to use Offline Charge displays (see [Figure 6-21](#)).



---

**Figure 6-21. Offline Charge**

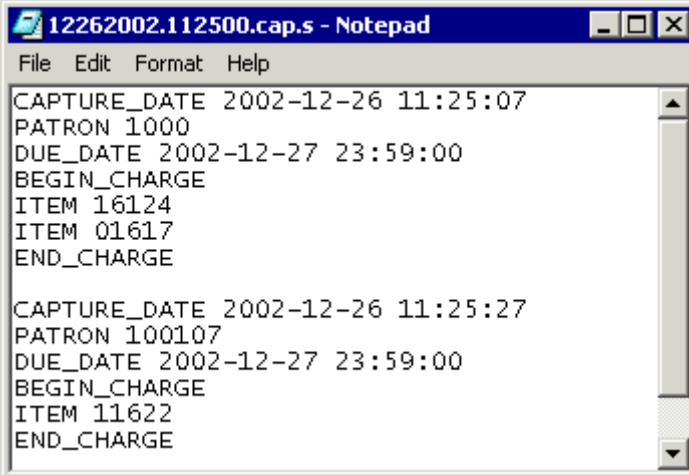
Since there is no connection to the server, and hence to the Circulation Policy Groups, a due date must be provided. Additionally, patron and item barcodes must be available since there is no way to search your voyager database.



**IMPORTANT:**

*Because you are not connected to your server, you cannot retrieve patron or item information. As a result, any problems or blocks associated with a patron or item barcode will not display.*

When using offline charge an Offline Capture file of patron barcodes and items is created in the `c:\Voyager\Circulation\Offline` directory, which must be uploaded to the Voyager database once a connection is established. An example of the file that is created is in [Figure 6-22](#).

A screenshot of a Notepad window titled "12262002.112500.cap.s - Notepad". The window has a menu bar with "File", "Edit", "Format", and "Help". The text content is as follows:

```
CAPTURE_DATE 2002-12-26 11:25:07
PATRON 1000
DUE_DATE 2002-12-27 23:59:00
BEGIN_CHARGE
ITEM 16124
ITEM 01617
END_CHARGE

CAPTURE_DATE 2002-12-26 11:25:27
PATRON 100107
DUE_DATE 2002-12-27 23:59:00
BEGIN_CHARGE
ITEM 11622
END_CHARGE
```

Figure 6-22. Example of an Offline Capture File

## Charging in Offline Circulation

---

When using offline charge, the following items should be considered:

- If your institution assigns the same due date to all patrons charging items while offline, then operators can leave the **Charge** workspace on screen and simply clear the patron barcode information from display (click the **x**) between patrons. This creates a single capture file on the local computer.
- If your institution assigns different due dates for items charged, then operators need to close and re-open the **Charge** workspace between charges. This allows the operator to enter a new due date and time. This creates separate capture files on the local computer. When uploading the system will find all the capture files created.



### IMPORTANT:

*If your institution uses the same barcode for multiple patron groups or the same barcode is assigned to different patrons, the **Multiple Patrons Found** dialog box opens when uploading the capture file. At this time the operator must select the correct patron (or patron group) to whom the item will be charged.*



## Procedure 6-5. Charging in Offline Charge

---

Use the following to charge or renew items using offline circulation:

1. Select **Yes** when asked if you want to proceed with Offline Charge when the connection to the server is lost or fails to be established at login.

Result: The **Enter Due Date for Offline Charge** dialog box opens (see [Figure 6-23](#)).

Enter Due Date for Offline Charge

Date: 11/4/2002 ...

Time: 11:59 PM

OK Cancel

---

Figure 6-23. Enter Due Date for Offline Charge Dialog Box

2. Enter the due date to be assigned to the items charged or renewed using offline charge. This dialog box opens each time the **Charge** button is clicked.

Result: The **Charge <Offline Mode>** workspace opens (see [Figure 6-24](#)).

Title	Item Barcode	Due Date	Status

**Figure 6-24. Offline Mode**

**NOTE:**

The title bar of the **Charge** workspace indicates operating in Offline Mode. Also all the other function buttons are not available due to the lack of a connection to the server.

3. To charge or renew an item, enter the patron's barcode in the **Barcode** field of the patron section and enter the item's barcode in the **Barcode** field of the item section.

Result: Items are charged/renewed and this information is stored in the Offline Capture file.

**OPTIONAL:**

*To charge another item to the same patron and use the same due date, enter the next item's barcode in the **Barcode** field.*

*To charge an item to a different patron and use the same due date, clear the old patron barcode information by clicking the **x** in the patron **Barcode** field and enter the new patron's barcode and the item's barcode.*

*To charge an item that has a different due date, close and re-open the **Charge** workspace and enter the patron and item barcodes.*

---

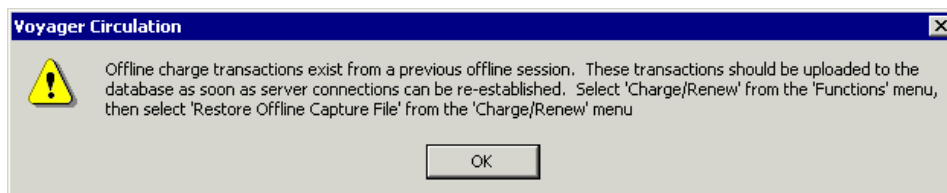
## Uploading the Offline Capture File

---

When a connection to the server is re-established, the Offline Capture file(s) located in `c:\Voyager\Circulation\Offline` must be uploaded to the server.

When logging in, a message displays alerting the operator that there are charge transactions from an offline session that need to be uploaded (see [Figure 6-25](#)).

---



---

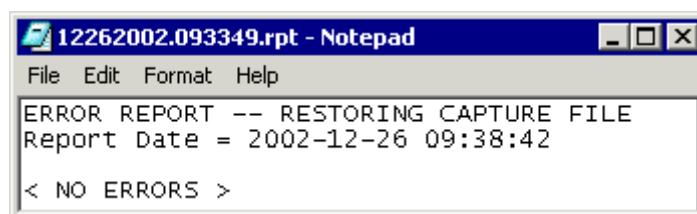
**Figure 6-25. Upload Offline Capture File Message**

When you select **Upload Offline Capture** file, the capture file is found and the contents are automatically processed. If there are multiple capture files, the system processes each one during this upload process. See [Procedure 6-6, Uploading the Offline Capture File](#), on page [6-32](#).

For each capture file processed, a report file is created. You can review the contents of this file using a text editor such as Notepad®.

If there are no errors, it is stated in this report file (see [Figure 6-26](#)).

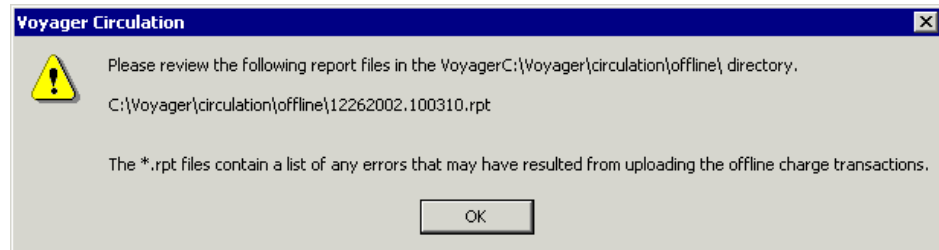
---



---

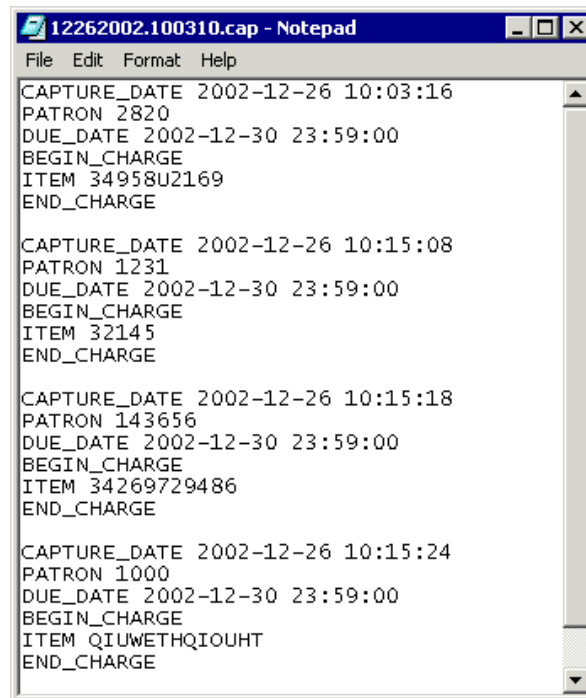
**Figure 6-26. No Errors When Uploading Capture File**

If errors occurred, a message displays ([Figure 6-27](#)) indicating the name of the error file and where to find it. The error report file is found in the `c:\Voyager\Circulation\Offline` directory.



**Figure 6-27. Offline Capture Error Report Message**

[Figure 6-28](#) shows a report file indicating that errors were found in the capture file.



**Figure 6-28. Capture File Error Report Due to Erroneous Patron and Item Barcodes**



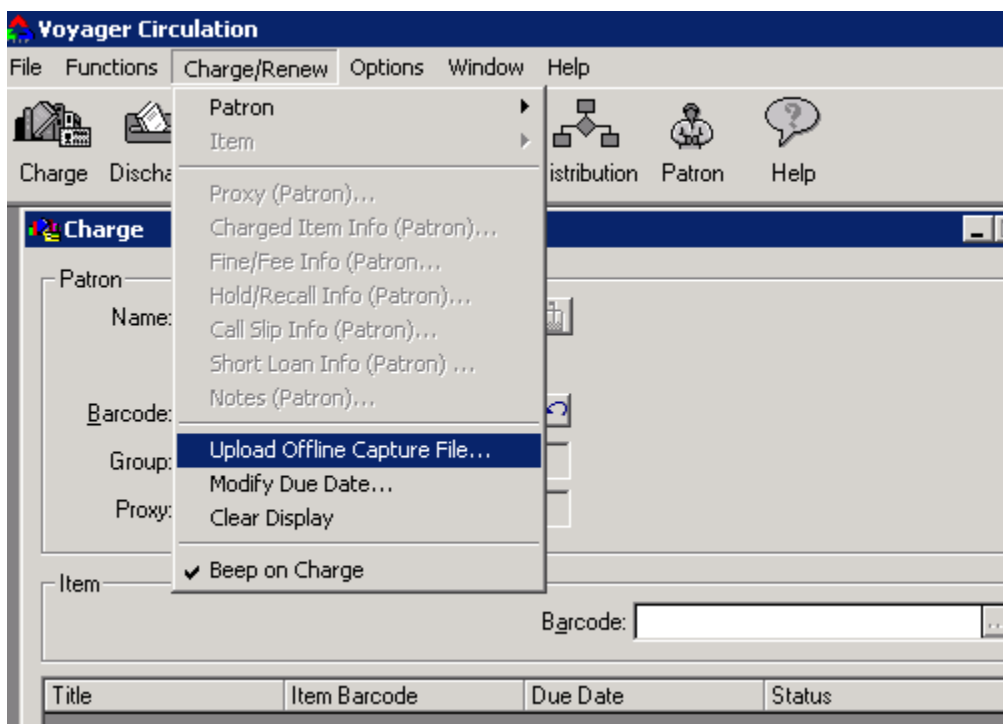
## Procedure 6-6. Uploading the Offline Capture File

Use the following to upload the Offline Capture file(s):

1. Log in to the Circulation module and click **OK** when the message alerting the operator that there are charge transactions from an offline session displays.
2. Click the **Charge** button or select **Charge/Renew** from the **Functions** menu.

Result: The **Charge** workspace opens and the **Charge/Renew** menu is activated in the toolbar.

3. From the **Charge/Renew** menu select **Upload Offline Capture File** (see [Figure 6-29](#)).



**Figure 6-29. Upload Offline Capture File**

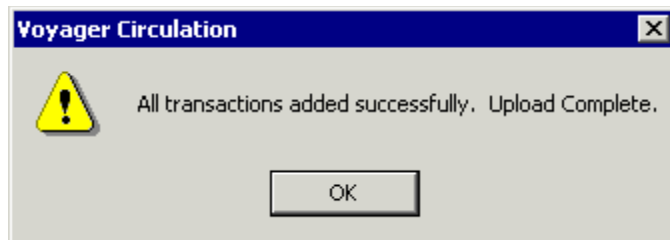
Result: The files are uploaded.



**NOTE:**

If the **Multiple Patrons Found** dialog box opens, the operator must select the patron to be charged.

After the successful upload, a message ([Figure 6-30](#)) displays.



**Figure 6-30. Successful upload message**

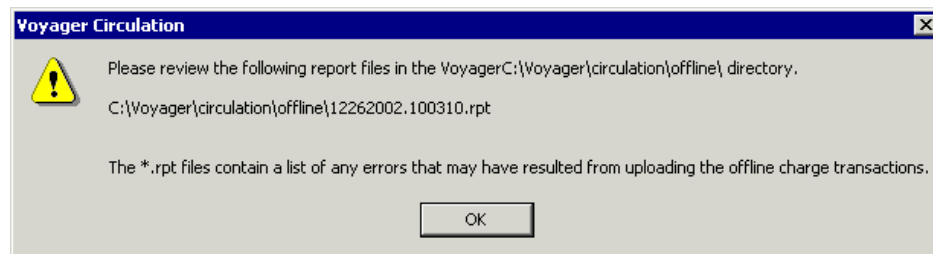
The **Charge** workspace shows the charges that were just uploaded (see [Figure 6-31](#)).

A screenshot of the "Charge" workspace in a software application. It contains input fields for "Patron" (Name, Barcode, Group, Proxy) and "Item" (Barcode). Below these fields is a table displaying the uploaded data.

Patron Name	Patron Barcode	Title	Item Barcode	Due Date	Status
Kent, Caryn	2644	History of the writings of Beatrix Potter, including unpublished work.	91804	9/29/2010 11:59 PM	C

**Figure 6-31. Uploaded Offline File Displayed**

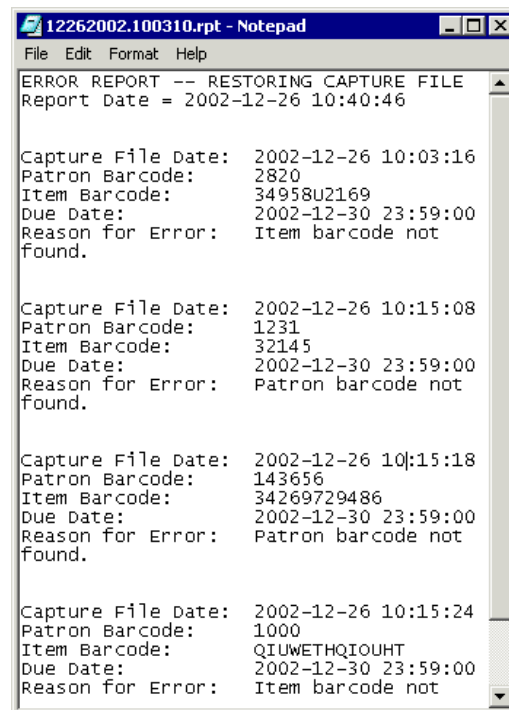
If there is an error in the file, a warning message displays (see [Figure 6-32](#)).



---

**Figure 6-32. Error in the Upload File Message**

The operator can review the error file to see why items were not charged. An example of a report file with errors is shown in [Figure 6-33](#).



---

**Figure 6-33. Example of a Report File With Errors**

---

### Introduction

---

Operators can discharge items and print discharge receipts from the **Discharge** workspace.

In addition to discharging items, operators with the proper authority can also backdate the discharge date and collect fines.

### Purpose of This Chapter

---

This chapter discusses the following information:

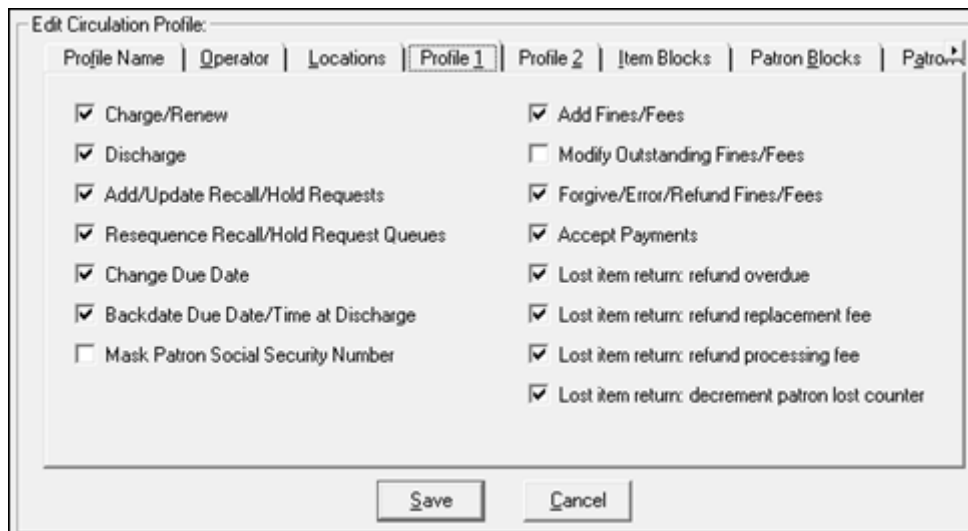
- Security needed to complete various tasks in the **Discharge** workspace
- Information about the **Discharge** workspace
- The **Discharge** workspace which allows the following tasks:
  - Discharging items
  - Backdating the discharge date
  - Collecting fines
  - Printing discharge slips
- Discharging from the **Charged Items Index** dialog box
- Alerts to the operator at the time of discharge

- Accessing the borrowing or requesting patron's patron record at discharge
- Tracking in-transit items after discharge
- Setting prompt fines/print discharge slips
- Setting beep on discharge

## Security

---

Depending on your security profile, you may be allowed to discharge items. Operators that have the **Discharge** check box selected on the **Profile 1** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to discharge items (see [Figure 7-1](#)).



**Figure 7-1. Discharge on the Profiles Tab**

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

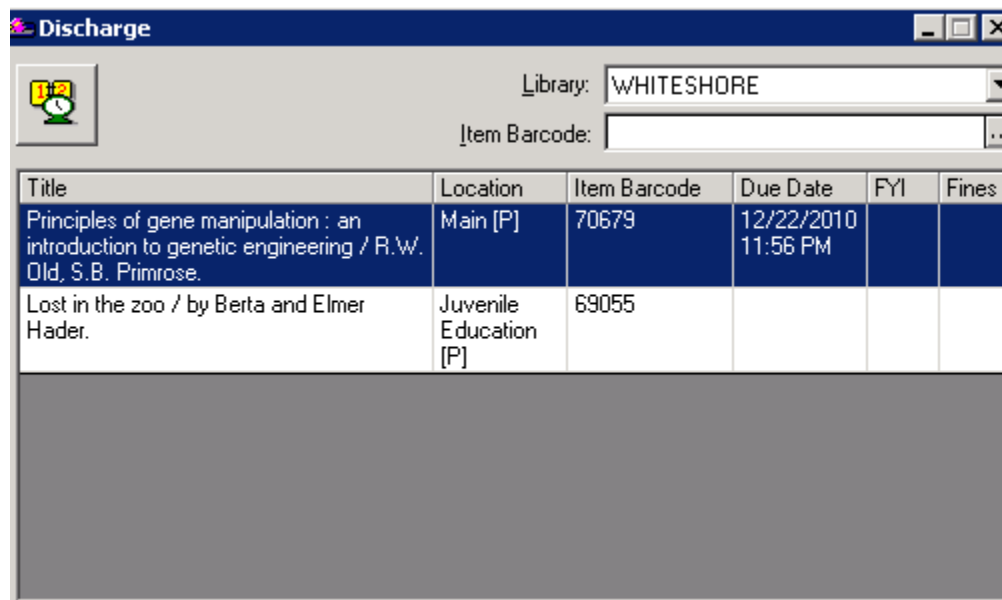
## The Discharge Workspace

---

From the **Discharge** workspace ([Figure 7-2](#)), operators can discharge items, backdate due dates, and collect fines. The **Discharge** workspace contains a scrollable list box that displays discharged items, sorted by last transaction first.

**NOTE:**


MARC information that displays in the **Discharge** workspace is in the Latin-1 character set.



**Figure 7-2. Discharge**

[Table 7-1](#) describes the **Discharge** workspace.

**Table 7-1. Discharge Workspace**

Name	Description
Backdate button 	Opens the Backdate Discharge Time to dialog box. See <a href="#">Backdating Due Dates</a> on <a href="#">page 7-6</a> .
Library	Circulation cluster to which the discharged items belong.
Item Barcode	Barcode of the item to be discharged. Click the ellipses button to open the Search dialog box. See <a href="#">Searching for an Item</a> on <a href="#">page 3-11</a> .
Title column	Title of the discharged item.

**Table 7-1. Discharge Workspace**

Name	Description
Location	Displays the item location.  <b>NOTE:</b> This is one of the locations as defined in System - Locations in Voyager System Administration (not the call number).
Item Barcode	Barcode of the discharged item.
Due Date	Due date of the discharged item.
FYI	If there is a pending request for the discharged item, information about that request and where the item is to be routed displays.
Fines	If there are any fines associated with the discharged item they display here.

**NOTE:**

To facilitate easier identification and access to relevant information, you can sort all display columns in Voyager Circulation. If the **Discharge** workspace lists more than one discharged item, a click of the column header, such as Title, organizes the display in ascending or descending sort order by title; a second click of the same header reverses the sort by title.

## Item Search

---

If the operator does not have an item barcode, he or she may click the ellipses in the **Item Barcode** field to access the **Search** dialog box (see [Figure 7-3](#)).

**NOTE:**

The **Search** dialog box allows operators to input search terms in the Unicode character set.

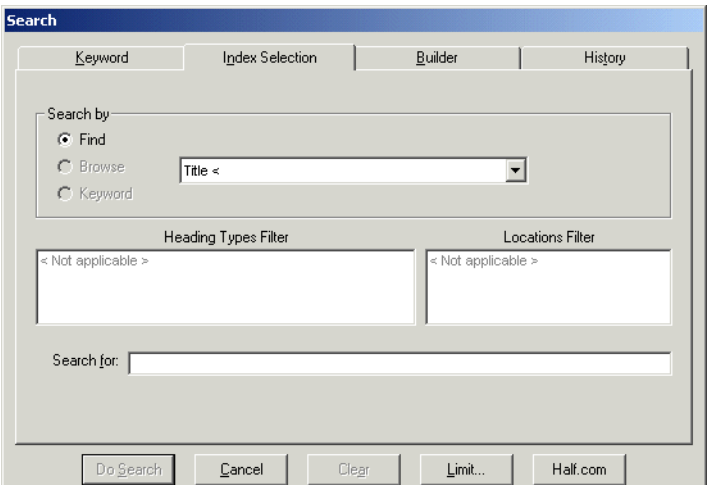


Figure 7-3. Search Dialog Box

See [Searching for an Item](#) on [page 3-11](#) for additional information on searching for items in the Circulation module.



**Procedure 7-1. Discharging Items**

Use the following to discharge an item:

1. After logging in to the Circulation module, click the **Discharge** button from the Circulation toolbar or select **Discharge** from the **Functions** menu (see [Figure 7-4](#)).

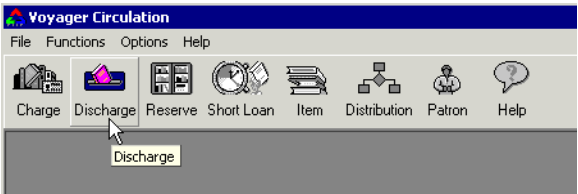


Figure 7-4. Discharge Button

Result: The **Discharge** workspace opens.

2. Perform one of the following to submit item information:
  - a. Enter the item's barcode in to the **Item Barcode** field and press **Enter**.
  - b. Scan the item's barcode in to the **Item Barcode** field.
  - c. Click the ellipses button (which opens the **Search** dialog box) or select **Item Headings/Keyword Search** from the **Discharge** menu or click the ellipsis button in the **Item Barcode** field to search for an item.

Result: The item is discharged as soon as the item displays in the list in the lower portion of the **Discharge** workspace, notice that the item is selected. Discharge information includes the title, item barcode, due date, FYI, and fines.

**NOTE:**

If you select an item that has been discharged and click the **Patron** button, the patron record of the patron that last discharged the item displays. Only one discharged item can be selected at a time. Activities on the discharge pop-up menu are not available for items that have already been discharged.

---

## Activities at Discharge

---

- If you selected printing of routing and discharge slips in **Session Preferences** (see [Table 13-2](#) on [page 13-5](#)), the slips are printed as soon as the item displays on the discharge screen.
- If the discharged item has an active hold on it prior to discharge, a hold slip is printed as well.
- If there is a patron or an item block, a message displays.
- If an item has a status of Lost, Missing, Withdraw, or Claims Returned, that status can be reset when the item is discharged if the current operator has the authority to update item records.

**NOTE:**

Operators can customize the format in which hold, routing, and discharge slips will print, changing heading information, font sizes and other details. See [Hold Slip Stanza](#) on [page A-11](#), [Routing Slip Stanza](#) on [page A-15](#), and [Discharge Slip Stanza](#) on [page A-9](#) for more information on customizing print templates.

## Backdating Due Dates

---

You can backdate items so that the discharge date is earlier than the date originally posted at the time of discharge.



---

## Security

---

Depending on your security profile, you may be allowed to discharge items. Operators that have the **Backdate Due Date/Time at Discharge** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to backdate due dates (see [Figure 7-1 on page 7-2](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.



---

### Procedure 7-2. Backdating the discharge date by setting an override

---

Use the following to backdate the discharge date by setting an override date:

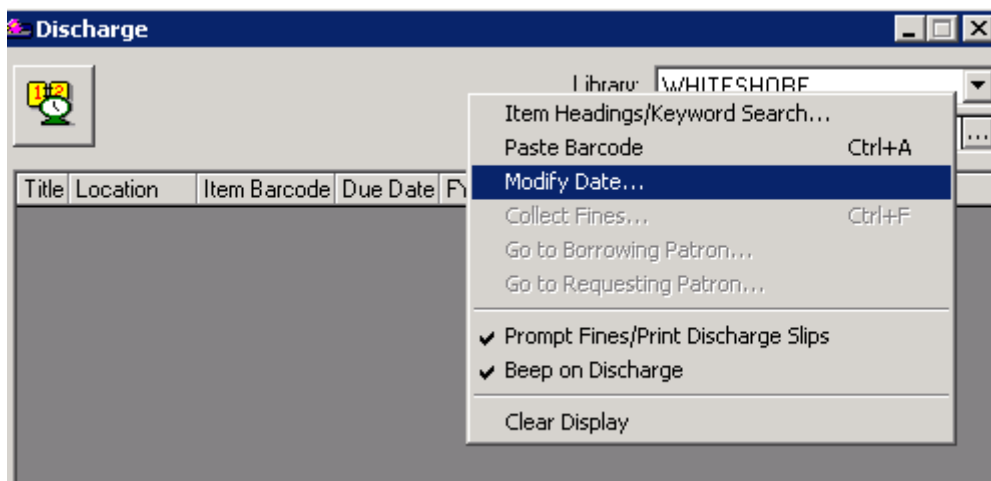
1. After logging in to the Circulation module, click the **Discharge** button from the Circulation toolbar or select **Discharge** from the **Functions** menu.

Result: The **Discharge** workspace opens.

2. Click the **Backdate** button or select **Modify Date** from the **Discharge** menu or right-click and select **Modify Date** from the submenu (see [Figure 7-5](#)).

#### **NOTE:**

In order to access the submenu, place the cursor in the top portion of the **Discharge** workspace and then right-click.



---

**Figure 7-5. Discharge Modify Date**

Result: The **Backdate Discharge Time To...** dialog box opens.

3. Enter the date to which the discharged items should be backdated in the **Date** field.

You can enter the date manually or click the drop-down button to display the **Calendar** dialog box.

4. Enter the time that the discharged items should be backdated to in the **Time** field.

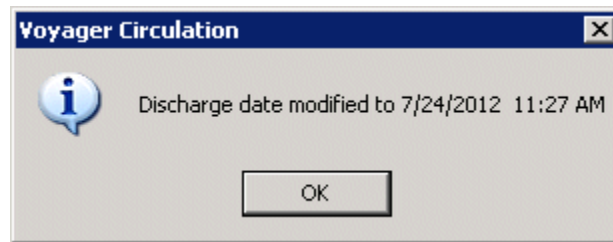


---

**Figure 7-6. Backdate Discharge Time To**

5. Click **OK** to save your changes and close the **Backdate Discharge Time To...** dialog box. Otherwise, click **Cancel** to close the dialog box without saving your changes.

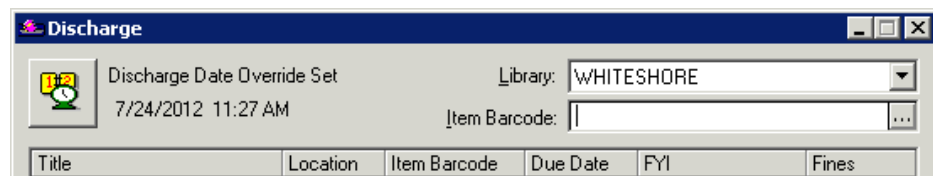
Result: A confirmation dialog box displays (see [Figure 7-7](#)).



**Figure 7-7. Discharge Due Date Modified Confirmation**

6. Click **OK**.

Result: The backdated discharge date is set. Discharge Date Override Set date and time displays next to the backdate button in the **Discharge** workspace (see [Figure 7-8](#)).



**Figure 7-8. Back Date Set**



**IMPORTANT:**

*The Discharge Date Override is in effect until you either click the **Backdate** button a second time or close the **Discharge** dialog box.*

7. Discharge the items.

If you are printing discharge slips, another slip prints with the modified discharge date.

Result: All the items that were discharged have been backdated.

## Collecting Fines

---

If the item(s) you are discharging has fines or fees, the **Fines** column of the discharge list displays the amount. You can collect the fines by accessing the **Patron Fines/Fees** dialog box and posting the amount to the patron's record.

From the Discharge menu, you can set the Fines prompt to off so you can discharge items without being prompted at every instance of a fine or fee.

## Security

---

Depending on your security profile, you may be allowed to accept payments. Operators that have the **Accept Payments** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to post payments to the patron's record (see [Figure 7-1 on page 7-2](#)).

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.



### Procedure 7-3. Collecting Fines

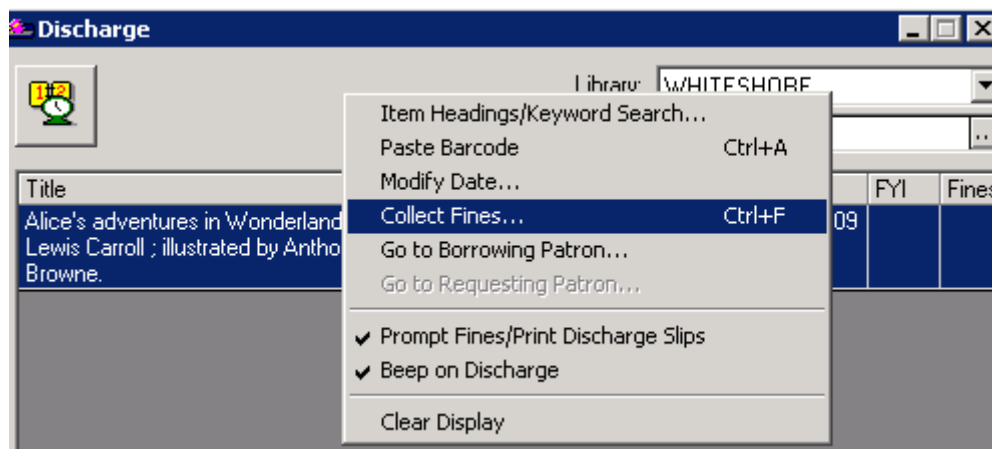
---

Use the following to collect fines:

1. After discharging an item (see [Discharging Items](#) on [page 7-5](#)) select **Collect Fines** from the **Discharge** menu or right-click to access the submenu (see [Figure 7-9](#)).

**NOTE:**

In order to access the submenu, the cursor must be in the top portion of the **Discharge** workspace and then the user should right-click, if not, the submenu will not display.



**Figure 7-9. Discharge Collect Fines**

Result: The **Patron Fines/Fees** dialog box opens.

2. If you want to post against a specific fine, select the fine from the **Outstanding Fines/Fees** tab.

You can select multiple fines and fees for payment in a single transaction by holding the **Ctrl** key down while selecting the fines and fees.

**NOTE:**

You cannot sort Patron Fines/Fees column displays in ascending or descending order by clicking on the column header.

3. Click the **Post** button.

Result: The **Post Against Fine/Fee** dialog box opens (see [Figure 7-10](#)).

---

**Figure 7-10. Post Against Fine/Fee Dialog Box**

4. Complete the following fields in the **Post Against Fine/Fee** dialog box:
  - a. Choose one of the **Post Against** option buttons: **Selected**, **Displayed**, or **Patron Total**.
  - b. Select the Posting Type from the drop-down list in the **Posting Type** field.
  - c. Enter the payment amount in dollars and cents in the **Amount** field.
  - d. Select the method of payment from the drop-down list in the **Method** field.
  - e. Add any additional information you want recorded with the transaction in the **Description** field.
5. Click **OK** to post the transaction and return to the **Patron Fines/Fees** dialog box. Otherwise, click **Cancel** to close the dialog box without saving your changes and return to the **Patron Fines/Fees** dialog box.

If you have Fine/Fee Receipt printing activated, the slip is printed as soon as the new entry displays in the **Patron Fines/Fees** dialog box.

6. Click the **Close** button in the **Patron Fines/Fees** dialog box to close the dialog box and return to the **Discharge** workspace.

For more information about posting patron fines and fees, see [Posting Against a Fine/Fee](#) on [page 4-102](#).

---

## Removing Item Statuses

---

If an item has a status of Lost, Missing, Withdraw, or Claims Returned, the status can be reset when the item is discharged.

## Security

---

Depending on your security profile, you may be allowed to discharge items. Operators that have the **Add/Update Item Records** check box selected, and therefore the **Set/Change Item Status** check box selected on the **Profile 2** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to discharge items (see [Figure 7-1 on page 7-2](#)).

See the *Voyager System Administration User's Guide* for more information.



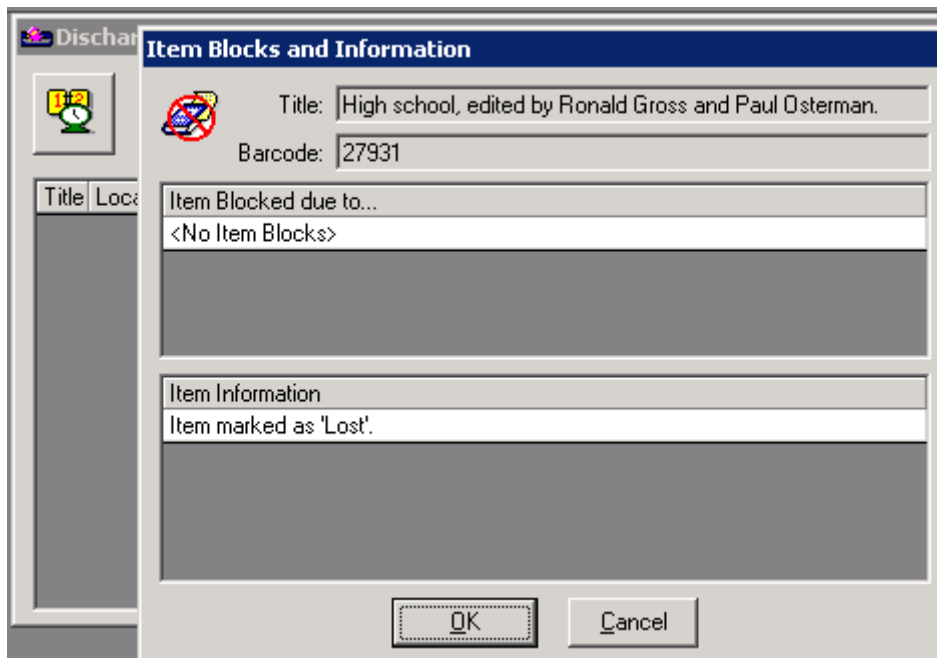
### Procedure 7-4. Removing an Item Status During Discharge

---

Use the following to remove an item status during discharge:

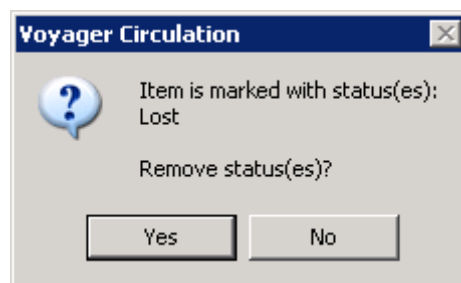
1. Access the **Discharge** workspace and enter the item's barcode in the **Item Barcode** field.

Result: The **Item Blocks and Information** dialog box opens (see [Figure 7-11](#)).



**Figure 7-11. Item Blocks and Information**

2. Click **OK** and a confirmation message displays (see [Figure 7-12](#)).



**Figure 7-12. Confirm Message to Remove Item Block**

3. Click **Yes** to remove the item status and discharge the item. Otherwise, click **No** to discharge the item without removing the item status.

Result: If **Yes**, the status is removed.



## Processing Returned Lost Item Refunds

---

If a lost item is returned, you can process a refund for charges associated with the lost item when the item is discharged (or renewed).

### Security

---

To process lost item refunds, you need to have the authorization to discharge items and the authorization to process refunds in your circulation security profile.

Operators that have the **Add/Update Item Records** check box selected and the **Set/Change Item Status** check box selected on the **Profile 2** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to discharge items (see [Figure 7-1 on page 7-2](#)).

You also need to have one or more of the lost item return authorizations selected on the **Profile 1** tab in the **Security - Circulation Profile** workspace in the System Administration module.

On the **Policies** tab in the **Circulation - Policy Definition** workspace for the circulation group that you're using, one or more of the the lost item return policies need to be selected.

See the *Voyager System Administration User's Guide* for more information.



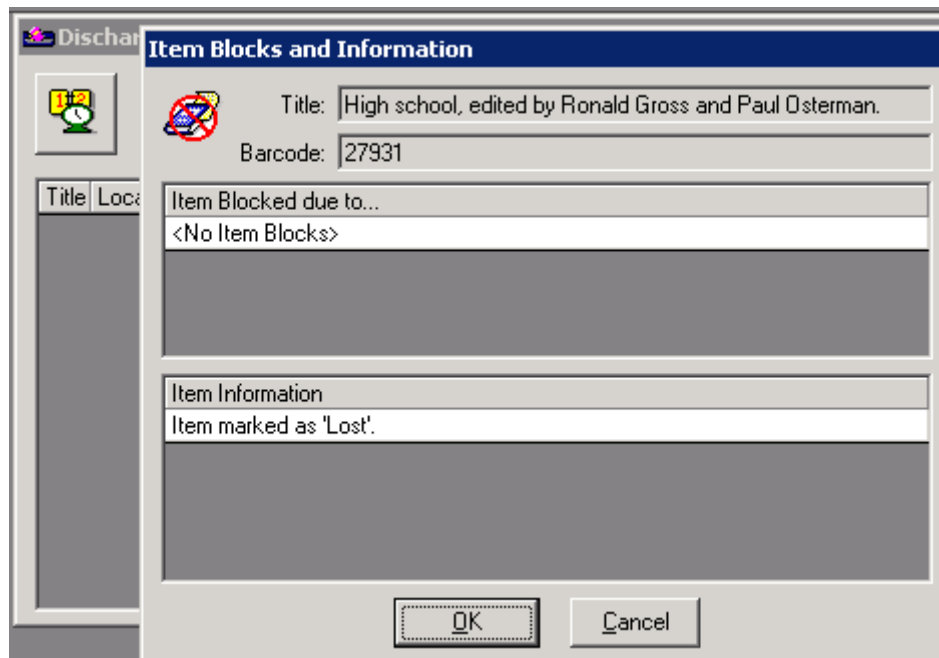
### Procedure 7-5. Processing Lost Item Refunds

---

Use the following to process lost item refunds:

1. Access the **Discharge** workspace and enter the item's barcode in the **Item Barcode** field.

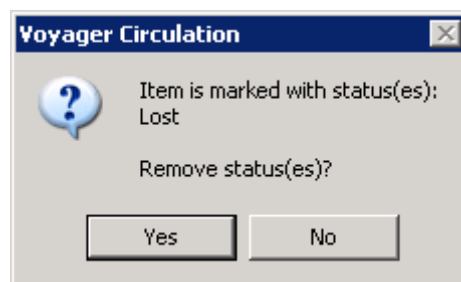
Result: The **Item Blocks and Information** dialog box opens (see [Figure 7-13](#)).



**Figure 7-13. Item Blocks and Information**

2. Click **OK**.

Result: A confirmation message displays (see [Figure 7-14](#)).



**Figure 7-14. Confirm Message to Remove Item Block**

3. Click **Yes** to remove the item status.

Result: The **Lost Item Fines and Fees** dialog box displays.

**NOTE:**

The display of the **Lost Item Fines and Fees** dialog box and the number of check boxes that display in the Lost Item Fines and Fees dialog box is dependent on how the lost item return configuration is set up in Voyager System Administration (see [Security](#) on [page 7-15](#)).

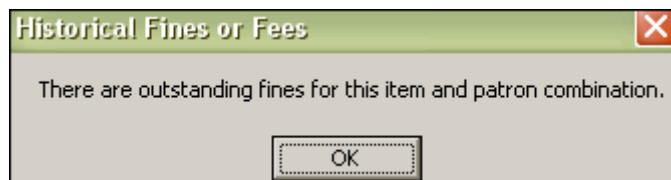


**Figure 7-15. Lost Item Fines and Fees**

4. On the Lost Item Fines and Fees dialog box, select the fines/fees to remove/refund the ones that are associated with the lost item being returned/discharged. Also, indicate if the Patron Lost Item Counter should be decremented by selecting the appropriate option.
5. Click **OK**.

**NOTE:**

After you have clicked **OK** in the Lost Item Fines and Fees dialog box, the system does an additional check for outstanding historical charges associated with the patron and item combination that are not related to lost item processing. If there are historical fines present, the system displays a message to the operator (see [Figure 7-16](#)) and places an entry (60 - Lost Item Return – Historical Fines Present) in the Circulation transaction log.



---

**Figure 7-16. Historical Fines or Fees Message**

**NOTE:**

The following may be logged when processing returned lost item refunds:

- 56 - Lost Item Return – Overdue Fine Not Removed
- 57 - Lost Item Return – Processing Fee Not Removed
- 58 - Lost Item Return – Replacement Fee Not Removed
- 59 - Lost Item Return – Patron Counter Not Decremented
- 60 - Lost Item Return – Historical Fines Present
- 61 - Lost Item Return – Lost Status not removed

These are in addition to 11 - Lost item discharged. These are logged when the Voyager System Administration configuration specifies to track the processing of returned lost item refunds for a specific Circulation unit and the staff user did not have the ability to address the lost item message at discharge. When the staff user has the ability to handle the lost item message at discharge, nothing is logged.

---

## Clearing Your Display

If you are discharging many items, you can clear the display of existing item information by selecting **Clear Display** from the **Discharge** menu.

---

## Prompting Fines/Printing Discharge Slips

When you are discharging items, you are automatically notified of fines and fees (the **Fines/Fees** dialog box opens) and to automatically print discharge slips. By default, this option is turned on when the Discharge function is opened.

This option could be turned on when discharging items for patrons but turned off when discharging numerous items at one time. For example, when discharging items from a book drop.

To turn off the fine prompts and discharge receipt printing, deselect **Prompt Fines/Print Discharge Slips** from the Discharge menu. Select **Prompt Fines/Print Discharge Slips** from the Discharge menu to turn on the option again.

## Pasting Barcodes into the Discharge Workspace

The Paste Barcode function allows the user to paste the last value stored on the clipboard into the Discharge workspace.

To paste the barcode into the Item Barcode field, use any of the following methods:

- Type the control sequence (**Ctrl + A**).
- Select **Paste Barcode** from the **Discharge** menu.
- Select **Paste Barcode** from the right-click menu of the Discharge workspace.
- Type the accelerator key (**Alt + d, t**)

### NOTE:

Since the clipboard only holds one piece of data, subsequent copies by any copy command that places data on the clipboard (such as **Ctrl + C**) overwrites the data. For more information on copying barcodes, see [Copying Barcodes from the Item Record](#) on [page 5-29](#).

## Alerts at Discharge

When discharging items (if configured in Voyager System Administration) operators may receive circulation alerts regarding the patron or item. These messages are displayed in a **Circulation Alerts** dialog box as shown in [Figure 7-17](#). In the [Figure 7-17](#) example, you need to click the **OK** button to acknowledge the alert and continue with the discharge process.

Circulation Session Preferences may be used to identify if alerts display (after being configured in Voyager System Administration). See [Alerts, Printing, and Fines/Fees/Demerits](#) on [page 13-2](#) for more information.

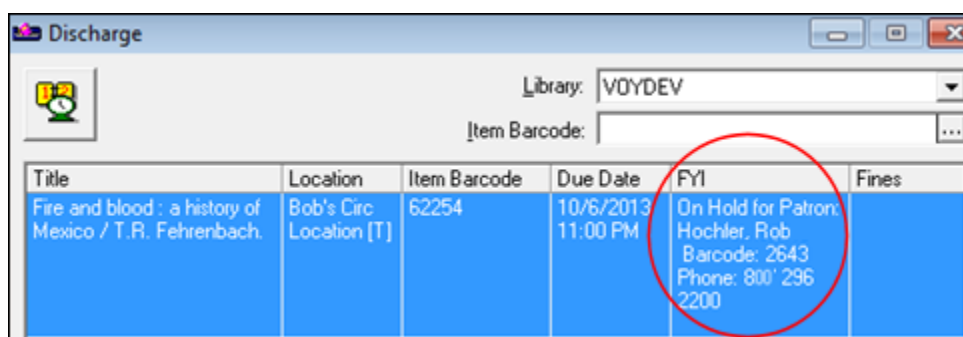


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**Figure 7-17. Example of a Circulation Alert for the Circulation Clerk**

Alerts can also display in the **FYI** column of the **Discharge** workspace ([Figure 7-18](#)).

---



---

**Figure 7-18. FYI Alert**

For information on configuring alerts, see *Circulation Alerts at Discharge and Charge* in the *Voyager System Administration User's Guide*.

**NOTE:**

If configured, alerts also display when discharging items from the **Charged Items Index** dialog box. See [Discharging Items from the Charged Items Index Dialog Box](#) for more information.

## **On-Line Tracking of In-Transit Items**

---

When an item is discharged, it is automatically assigned one or more statuses. For example, in an ordinary discharge the status assigned is Discharged and after the shelving interval passes it changes to Not Charged, presumably back on the shelf.

In some cases, the circulation desk at which the item is discharged is not the circulation desk where the item belongs and it must be sent to the appropriate desk. Items are considered In-Transit if they are en route from one circulation desk to another.

Items can have the following statuses:

- In-Transit - An item is en route from one location to another. This is a manually applied status.
- In-Transit Discharged - A courtesy discharge has taken place and the item is now on its way home, where home is defined as a circulation desk within the item's circulation policy group. The location where the item resides may be in a different cluster, different database than where it was discharged, or within the same circulation policy group but a different circulation desk. This status is automatically applied by the system at discharge.
- In-Transit on Hold - An item is en route to a hold shelf at a location selected by the requesting patron. The location to where the item is being routed may be in a different cluster, different database than where it originated, or within the same circulation policy group but a different circulation desk. This status is automatically applied by the system at discharge.

While an item is in transit, operators can track where and when items have been discharged and where they have been sent. Additionally, tracking occurs within a circulation cluster, between circulation clusters, and between databases. Patrons can track their items as well in WebVoyage. See the *Voyager WebVoyage User's Guide* for more information.

See [List of Possible Item Statuses](#) on [page 5-20](#) for more information on item statuses.

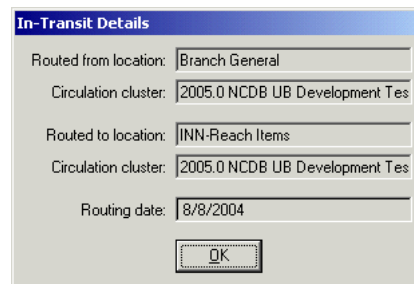
**NOTE:**

If an item belongs to a circulation policy group with multiple circulation desks (happening locations), when it is discharged at a desk not in its circulation policy group, the system selects a circulation desk within the item's circulation policy group to which it is sent.

### **In-Transit Details Dialog Box**

---

Operators can track an item using the **In-Transit Details** dialog box ([Figure 7-19](#)).



**Figure 7-19. In-Transit Details Dialog Box**

[Table 7-2](#) describes the **In-Transit Details** dialog box.

**Table 7-2. In-Transit Details Dialog Box**

Field	Description	Range
Routed from location	The last location at which the item was discharged.	Populated by the system automatically. Blank if no data is available.
Circulation cluster	Name of the remote circulation cluster, if applicable.	Populated by the system automatically. Blank if no data is available.
Routed to location	The name of the location to which the item has been routed.	Populated by the system automatically. Blank if no data is available.
Circulation cluster	Name of the remote circulation cluster, if applicable.	Populated by the system automatically. Blank if no data is available.
Routing date	The date on which the item was discharged.	Populated by the system automatically. Blank if no data is available.



## Exceptions in Item Tracking

---

There are some scenarios in which an in-transit item is not tracked.

- Items to whom the In-Transit status is manually applied.
- Situations where, for whatever reason (such as being misrouted), an item is discharged at additional circulation desks between the original discharging desk and the desk to which the item is going. In these cases the location of any intermediate desks is not tracked. For example:
  - If an item, which has a status of `In-Transit Discharged`, is discharged a second time at a circulation desk that is not in the item's circulation policy group, the location of the second desk is not tracked.
  - If an item, which has a status of `In-Transit Discharged`, is placed on hold, the **In-Transit Details** dialog box shows the original location from which the item was discharged and the hold shelf location. The home location is not tracked.
  - If an item, which has a status of `In-Transit Discharged`, is discharged at a circulation desk other than the destination hold shelf, the date and location of that discharge is not tracked. Only the original discharge and the destination location are tracked.
- When an item, which has a status of `Not Charged`, is discharged at a circulation desk that does not belong to the item's circulation group, although the item is in transit to a location in its policy group, the discharge desk is not tracked.
- When an item, which has a status of `Charged`, is discharged at a remote library, the remote library's discharge location does not get tracked.

## Tracking an In-Transit Item

---

Operators can track an In-Transit item in the Circulation module using the **In-Transit Details** dialog box. [Procedure 7-6, Tracking an In-Transit Item](#) describes how to do this. Patrons can track their In-Transit items in WebVoyage.



### Procedure 7-6. Tracking an In-Transit Item

---

Use the following to track an In-Transit item:

1. Search for and display the In-Transit item's item record. See [Searching for an Item on page 3-11](#).

Result: The Item record opens (see [Figure 7-20](#)).

---

The screenshot shows a software window titled "Item Record". It contains a title field, a table of holdings, and a detailed form for item information.

**Title:** San Francisco Museum of Modern Art, the painting and sculpture collection / Diane C. du Pont ... [et al.] ; introduction by Katherine Church Holland ; foreword by Henry T. Hopkins.

**Holdings Table:**

Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
Main	book	In Transit On Hold+			0	52685

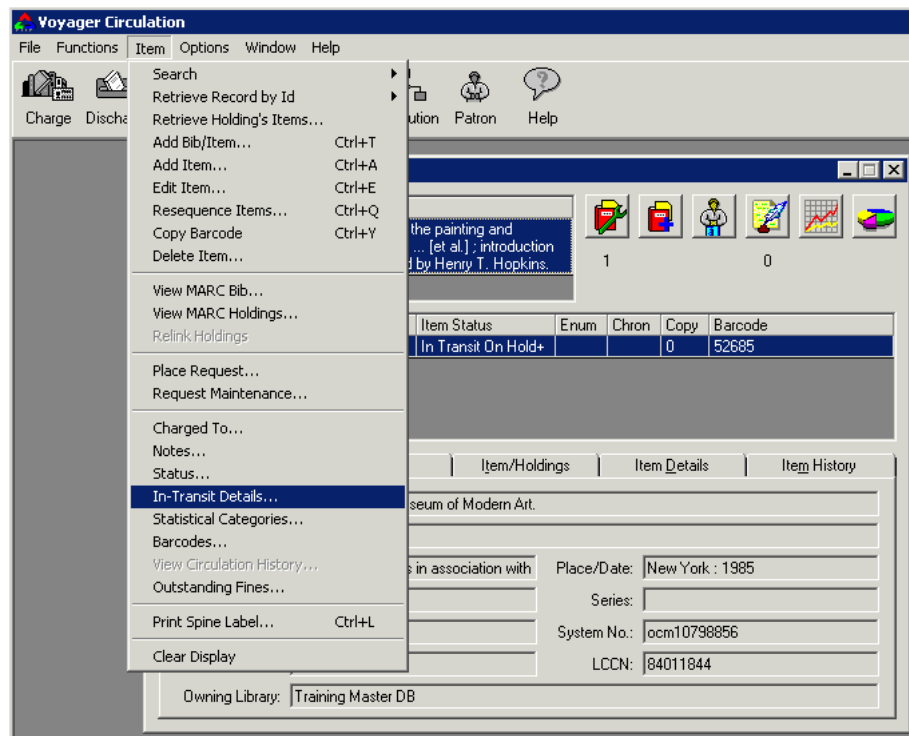
**Item Details Form:**

Bib Brief		Holdings		Item/Holdings		Item Details		Item History	
Author: San Francisco Museum of Modern Art.									
Edition: 1st ed.									
Publisher: Hudson Hills Press in association with					Place/Date: New York : 1985				
Pub. No.:					Series:				
ISSN:					System No.: ocm10798856				
ISBN: 0933920598 :					LCCN: 84011844				
Owning Library: Training Master DB									

---

**Figure 7-20. Item Record**

2. Select **In-Transit Details** from the Item Menu, **Item> In-Transit Details** (see [Figure 7-21](#)).

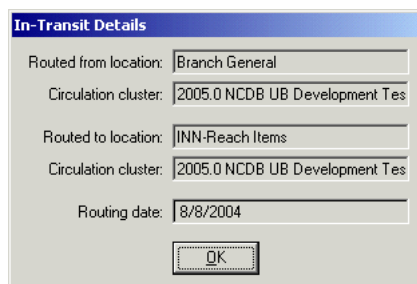


**Figure 7-21. Selecting In Transit Details from the Item Menu**

**NOTE:**

The item status must be either In-Transit Discharged or In-Transit on Hold for the **In-Transit Details** menu option to be available. Yet, not all items with these statuses are tracked; see [Exceptions in Item Tracking](#).

Result: The **In-Transit Details** dialog box opens (see [Figure 7-22](#)).



---

**Figure 7-22. In-Transit Details Dialog Box**

Result: The circulation operator accesses the tracking information.

3. Click the **OK** button to close the dialog box.
- 

## Accessing the Patron's Record at Discharge

---

After discharging an item, the operator can access either the borrowing patron's patron record or the requesting patron's patron record (if there is a request placed on the item.)

[Procedure 7-7, Accessing the Borrowing Patron's Patron Record at Discharge](#) describes how to access the borrowing patron's patron record.

[Procedure 7-8, Accessing the Requesting Patron's Patron Record at Discharge](#), on page [7-28](#) describes how to access the requesting patron's patron record.



### Procedure 7-7. Accessing the Borrowing Patron's Patron Record at Discharge

---

Use the following to access the patron record of the borrowing patron:

1. After discharging an item, click the **Patron** button from the Circulation toolbar or select **Go to Borrowing Patron** from the contextual (right-click) menu (see [Figure 7-23](#)).

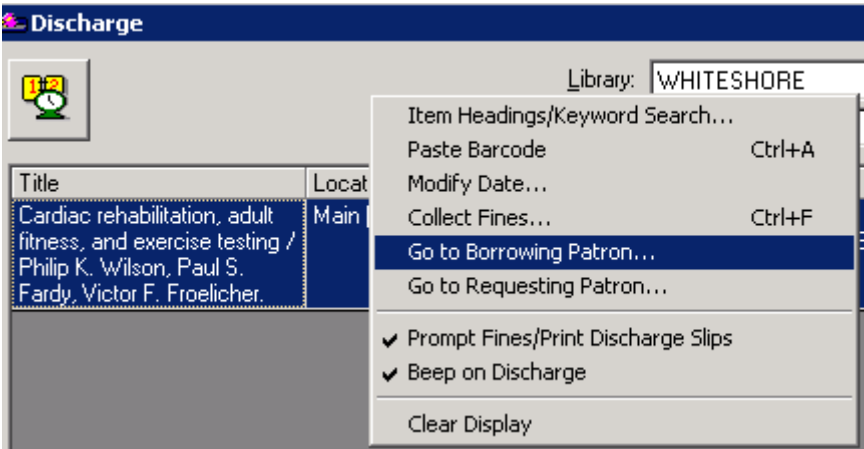


Figure 7-23. Go To Borrowing Patron

Result: The **Patron** record displays (see [Figure 7-24](#)).

**Discharge** Patron ID 717

Last: Smith First: Bob Middle: Title: Name Type: Personal Entered At: Circulation Desk

3 \$6.00 0

Barcode	Patron Group	Status/Date	Operator Id
321	Faculty	Active - 7/1/2010	demo

Institution Id: SSN: 262624426

**Figure 7-24. Patron Record Displayed**

**NOTE:**  
The **Discharge** workspace remains.



#### **Procedure 7-8. Accessing the Requesting Patron's Patron Record at Discharge**

Use the following to access the patron record of the requesting patron:

1. After discharging an item with a pending request, from the contextual (right-click) menu select **Go to Requesting Patron** (see [Figure 7-25](#)).

**NOTE:**  
Clicking the **Patron** button from the Circulation toolbar displays the borrowing patron's patron record.

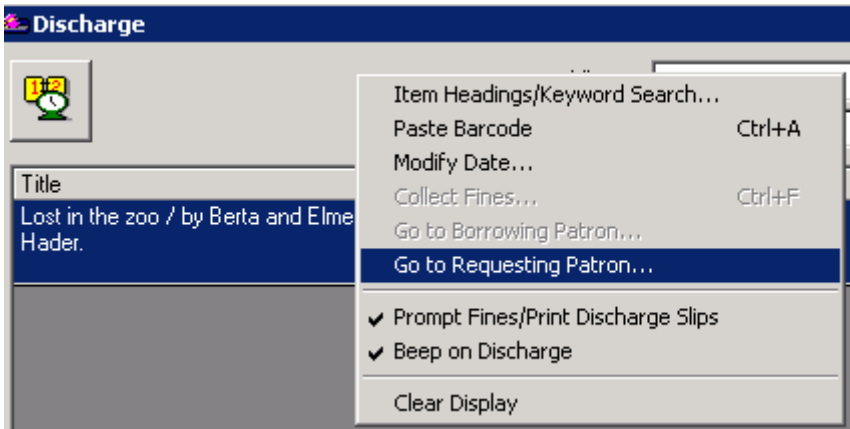


Figure 7-25. Go To Requesting Patron

Result: The **Patron** record displays (see [Figure 7-26](#)).

**Discharge** Patron ID 718

Last: Wright  
First: Roger  
Middle:  
Title:  
Name Type: Personal  
Entered At: Circulation Desk

1 \$0.00  
0

**Circulation Alerts**

! Patron has items on the hold shelf.

OK

Barcode Patron Gr  
4826814 Staff

Institution Id: 111999 SSN:

---

**Figure 7-26. Requesting Patron Record Displayed**

**NOTE:**  
The **Discharge** workspace remains.

---

## Setting a Beep on Discharge

---

Operators may set the system to beep on discharge.



### Procedure 7-9. Setting a Beep on Discharge

---

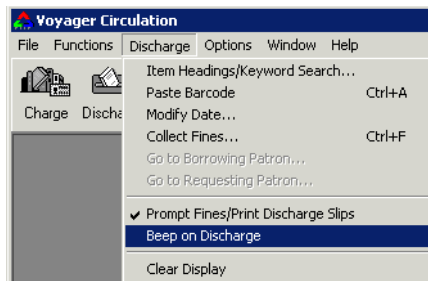
Use the following to set a beep on discharge:



1. After logging in to the Circulation module, click the **Discharge** button from the Circulation toolbar or select **Discharge** from the **Functions** menu.

Result: The **Discharge** workspace opens.

2. Access the **Discharge** menu, or right-click to access the submenu and select **Beep On Discharge** (see [Figure 7-27](#)).



---

**Figure 7-27. Select Beep on Discharge from Menu**

Result: This toggles on **Beep on Discharge**. A check mark indicates the feature is on.

---



### Introduction

---

The Course Reserve function allows sites to centralize and limit the use of class materials. This is done by creating and editing reserve lists, adding and removing items from reserve lists, and adding, editing, or deleting course information.

To use a course reserve list, it must be active. The following pieces of the reserve list must be in place for the list to be active:

- The effective dates in the header of the reserve list must include the current date; see [Reserve List Header Section](#) on [page 8-4](#)
- The items on the **Items** tab must all be turned On Reserve; see [Placing Items On Reserve \(Reserving Items\)](#) on [page 8-36](#)
- The list must be linked to an instructor, a course, a department, or a section; see [Linking Reserve Lists to Course Information](#) on [page 8-52](#)

For those reserve lists that are used for the same time period (for example, spring semester), contain the same items, and are linked to the same course and instructor every academic school year, operators simply update the effective dates in the header, turn the items On reserve, update any course or instructor links if necessary, and the list is searchable in WebVoyáge.



**IMPORTANT:**

*Searching for a course reserve list in WebVoyáge only returns items that are on an active course reserve list.*

## Purpose of This Chapter

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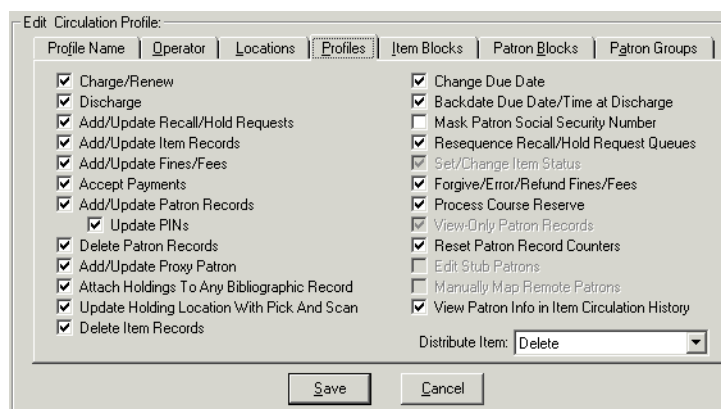
This chapter discusses Voyager's Course Reserve functionality, covering the following areas:

- Security for Course Reserve
- The **Reserve** workspace
- Creating Course Reserve lists
- Searching for Course Reserve lists
- Adding, Removing and Changing Item Types and Locations for Physical Items on Reserve lists
- Placing items On Reserve and Unreserving Items
- Adding and Deleting E-Items to Reserve lists
- Linking Course Reserve lists to courses
- Deleting Reserve lists
- Course Reserve batch jobs

## Security

---

Depending on your security profile, you may be allowed access to the **Reserve** workspace. Operators that have the **Process Course Reserve** check box selected on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module have the ability to work in the **Reserve** workspace (see [Figure 8-1](#)).



**Figure 8-1. Process Course Reserve on the Profiles Tab**

If this is not selected, the operator is limited to searching for reserve lists, and viewing the lists Charged to information, the list history, as well as, printing a pick list.

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

## Reserve Workspace

The **Reserve** workspace ([Figure 8-2](#)) consists of the following sections:

- **Reserve List Header** section contains general information about the list
- **Items** and **E-Items** tabs contain lists of items that make up the course reserve list
- **Linked Courses** section lists the courses that are linked to this course reserve list

Course Reserve distinguishes between physical items and electronic items.

- Physical items are things such as magazines, books, maps, and photocopies. They are tangible and have a barcode.
- Electronic items are journals distributed over the Web that are accessed through a Web browser and do not have a barcode. Because electronic items are not selected out in the traditional way, they are handled differently in Course Reserve.

The **Items** tab and the **E-Items** tab distinguish between these two types of items.

From within the **Reserve** workspace users may perform many functions. While pointing to any of the three sections of the **Reserve** workspace, operators may perform a right-click to display a submenu which contains many of the same commands listed on the Reserve menu above. Each of these sections has a unique submenu.

---

The screenshot shows the 'Reserve' workspace interface. At the top, the 'Reserve List Header' section contains the following fields:

- List Name: Political Science 101
- Effective: 8/15/2002 - 12/20/2002
- Location: Government Documents
- Item Type: 2 hour reserve
- Item Count: 3
- E-item Count: 0

Below the header, there are two tabs: 'Items' and 'E-Items'. The 'Items' tab is selected, displaying a table of reserved items:

Title	Author	Barcode	Call Number	Location	Item Type
Jeffersonian tradition in American democracy / by Charles Maurice Wiltse.	Wiltse, Charles Maurice, 1907-	16103	JC176.J45 w48	Main	Book
Modern government: a survey of political science [by] Dell Gillette Hitchner [and] William Henry	Hitchner, Dell Gillette.	55656	JA66 .H5	Main	Book

At the bottom, the 'Linked Courses' section displays a table:

Department	Instructor	Course	Section
PS: Political Science	Smartlady, Dr. Emma	PS 101: Introduction to Politica	A1 (250 students)

---

Figure 8-2. Reserve Workspace

### Reserve List Header Section

---

[Figure 8-3](#) shows the **Reserve List Header** section of the **Reserve** workspace.

---

The screenshot shows the 'Reserve List Header' section of the Reserve workspace, which is a subset of the interface shown in Figure 8-2. It contains the following fields:

- List Name: Political Science 101
- Effective: 8/15/2002 - 12/20/2002
- Location: Government Documents
- Item Type: 2 hour reserve
- Item Count: 3
- E-item Count: 0

---

Figure 8-3. Reserve List Header Section

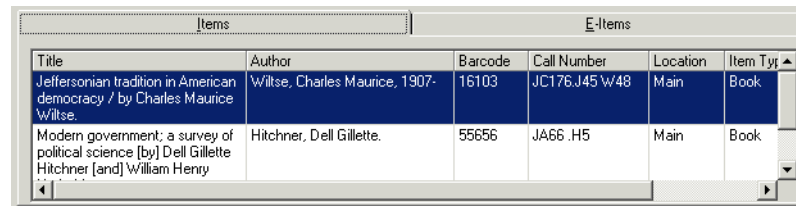
[Table 8-1](#) describes the **Reserve List Header** section of the **Reserve** workspace.

**Table 8-1. Reserve List Header of the Reserve Workspace**

Name	Description
List Name	Name of the reserve list.
Effective	Dates within which this list is active.
Location	Location of the items on the reserve list.
Item Type	Default item type of the items on this reserve list.
E-Item Count	Number of electronic items that are on this reserve list.
Item Count	Number of physical items that are on this reserve list.

### Items and E-Items Tabs

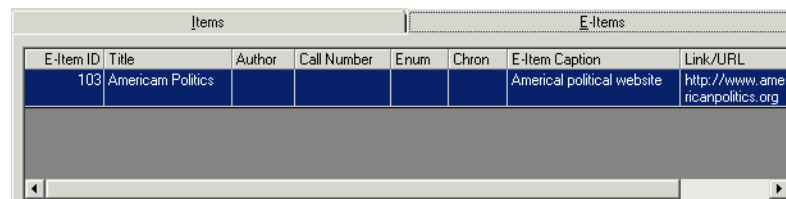
[Figure 8-4](#) shows the **Items** tab of the **Reserve** workspace.



Title	Author	Barcode	Call Number	Location	Item Type
Jeffersonian tradition in American democracy / by Charles Maurice Wiltse.	Wiltse, Charles Maurice, 1907-	16103	JC176.J45 W48	Main	Book
Modern government; a survey of political science [by] Dell Gillette Hitchner [and] William Henry	Hitchner, Dell Gillette.	55656	JA66 .H5	Main	Book

**Figure 8-4. Items Tab**

[Figure 8-5](#) shows the **E-Items** tab of the **Reserve** workspace.



E-Item ID	Title	Author	Call Number	Enum	Chron	E-Item Caption	Link/URL
103	Americam Politics					America political website	<a href="http://www.americanpolitics.org">http://www.americanpolitics.org</a>

**Figure 8-5. E-Items Tab**

**NOTE:**

MARC information displays in the Latin-1 character set.

[Table 8-2](#) describes the tabs of the **Reserve** workspace.

**Table 8-2. Items and E-Items Tabs of the Reserve Workspace**

Name	Description
Items tab	
On Reserve	Whether the item on the list has the On Reserve status.
Title	Title of the reserve item.
Author	Author of the reserve item.
Barcode	Reserve item's barcode.
Call Number	Reserve item's call number.
Location	Reserve item's permanent location.
Item Type	Reserve item's item type.
E-Items tab	
E-Item ID	System supplied identification number.
Title	Title of the reserve e-item.
Author	Author of the reserve e-item.
Call Number	Call Number of the reserve e-item.
Enum	Enumeration of the reserve e-item.
Chron	Chronology of the reserve e-item.
E-Item Caption	Caption of the reserve e-item.
Link/URL	Link or URL to access the reserve e-item.

---

When items on the reserve list are turned On Reserve, the Reserve Location specified in the list header becomes the item's temporary location. WebVoyage displays the item's permanent location followed by Temporarily shelved at... with the temporary location displayed.

Also, the Item Type specified in the reserve list header becomes the item's temporary item type. As a result, when a reserve item is charged to a patron, the system follows the circulation policy definitions for the item's temporary item type rather than the item's permanent item type.



## Linked Courses Section

[Figure 8-6](#) shows the **Linked Courses** section of the **Reserve** workspace.

Department	Instructor	Course	Section
PS: Political Science	Smartlady, Dr. Emma	PS 101: Introduction to Political Science	A1 (250 students)

**Figure 8-6. Linked Courses Section**

[Table 8-3](#) describes the **Linked Courses** section of the **Reserve** workspace. This section is populated once the list is linked to a course.

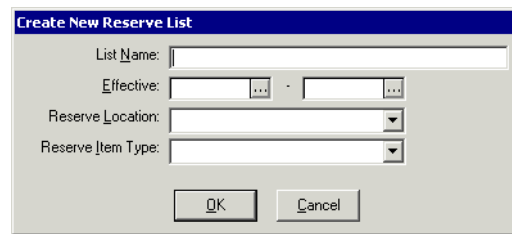
**Table 8-3. Linked Courses section of the Reserve workspace**

Name	Description
Department	Department offering the course.
Instructor	Instructors name.
Course	Course name.
Section	Section of the course.

## Creating Reserve Lists

Operators can create a course reserve list to which items can be temporarily assigned and linked to courses and instructors.

[Figure 8-7](#) shows the **Create New Reserve List** dialog box. The information entered in the **Create New Reserve List** dialog box populates the information fields in the header of the list.

**Figure 8-7. Create New Reserve List Dialog Box**

[Table 8-4](#) describes the **Create New Reserve List** dialog box.

**Table 8-4. Create New Reserve List dialog box**

Name	Description	Required	Range
List Name	Name of the Course Reserve List.	Yes	Alphanumeric, punctuation, and spaces  Uppercase and lowercase allowed  40 characters
Effective	Effective dates for the Course Reserve List.  It must include the current date for the list to be active and searchable in WebVoyage.	Yes	Date  Click the drop-down arrow or press F4 to access the calendar dialog box and select a date.
Reserve Location	Location selected for this field becomes the temporary location for all items on the list with a status of On Reserve.	No	Drop-down list of available locations.
Reserve Item Type	Item type selected for this field becomes the temporary item type for all items on the list with a status of On Reserve.	No	Drop-down list of available item types.



### Procedure 8-1. Creating a Course Reserve List

Use the following to create a Course Reserve List:

1. Select **Reserve** from the **Functions** menu or click the **Reserve** button on the Circulation toolbar (see [Figure 8-8](#)).

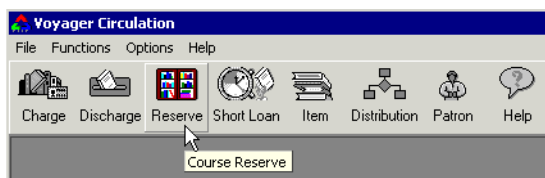


Figure 8-8. Reserve Button

Result: The **Reserve List Search** dialog box opens over the **Reserve** workspace (see [Figure 8-9](#)).

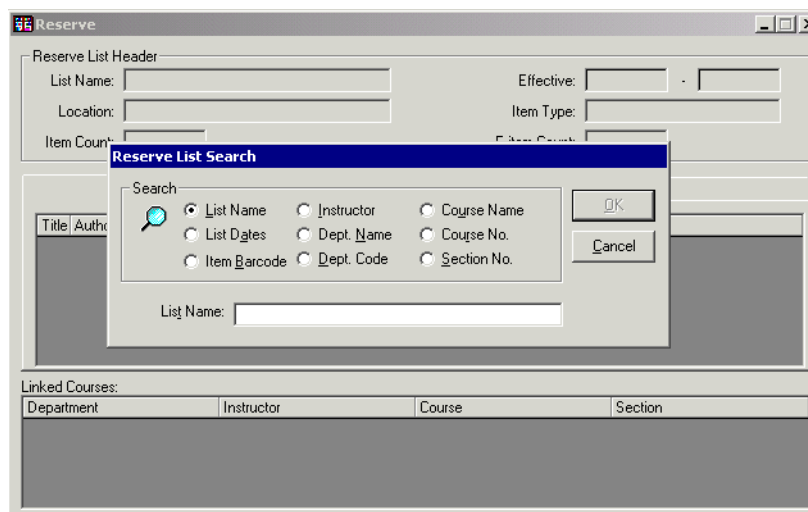


Figure 8-9. Reserve List Search Dialog Box and Reserve Workspace

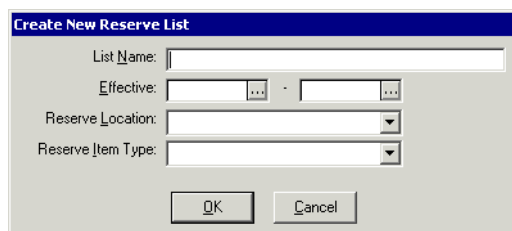
2. Click the **Cancel** button and close the **Reserve List Search** dialog box.

Result: A blank **Reserve** workspace opens.

3. Select **Create New List (Ctrl + N)** from the **Reserve** menu (or right-click at the header and select the same command from the submenu).

Result: The **Create New Reserve List** dialog box opens (see [Figure 8-10](#)).

---

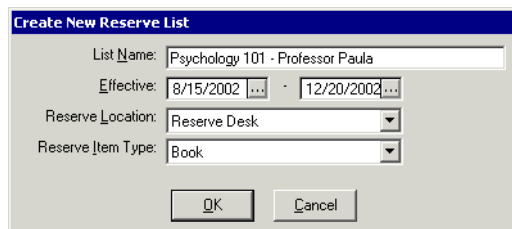
The image shows the 'Create New Reserve List' dialog box. It has a title bar with the text 'Create New Reserve List'. Inside, there are four fields: 'List Name' (a text box), 'Effective' (two date pickers separated by a hyphen), 'Reserve Location' (a drop-down menu), and 'Reserve Item Type' (a drop-down menu). At the bottom are 'OK' and 'Cancel' buttons.

---

**Figure 8-10. Create New Reserve List Dialog Box**

4. Fill out the following fields on the **Create New Reserve List** dialog box (see [Figure 8-11](#)):
  - a. Enter the name of the new reserve list in the **List Name** field.
  - b. Enter the begin and end dates for the list in the **Effective** date fields.
  - c. Select a reserve location from the drop-down list in the **Reserve Location** field.
  - d. Select an item type from the drop-down list in the **Reserve Item Type** field.

---

The image shows the 'Create New Reserve List' dialog box with fields filled out. 'List Name' is 'Psychology 101 - Professor Paula'. 'Effective' dates are '8/15/2002' and '12/20/2002'. 'Reserve Location' is 'Reserve Desk'. 'Reserve Item Type' is 'Book'. 'OK' and 'Cancel' buttons are at the bottom.

---

**Figure 8-11. Example of a Completed Create New Reserve List Dialog Box**

5. Click **OK** to create the new list and return to the **Reserve** workspace. Otherwise, click **Cancel** to close the dialog box without saving your changes.

Result: The new list is created.

---

### Editing the Reserve List Header

Operators can edit the information that displays at the top (the header) of the reserve list.



---

#### Procedure 8-2. Editing the Reserve List Header

---

Use the following to edit the Reserve List Header:

1. From an open reserve list select **Edit List Header... (Ctrl + E)** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The **Edit Reserve List Header** dialog box opens (see [Figure 8-12](#)).

---

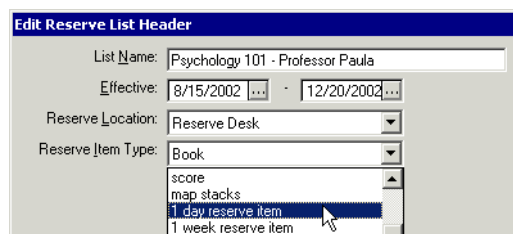
The screenshot shows a dialog box titled "Edit Reserve List Header". It contains the following fields and controls:

- List Name:** A text box containing "Psychology 101 - Professor Paula".
- Effective:** Two date pickers showing "8/15/2002" and "12/20/2002".
- Reserve Location:** A dropdown menu with "Reserve Desk" selected.
- Reserve Item Type:** A dropdown menu with "Book" selected.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

---

**Figure 8-12. Edit Reserve List Header Dialog Box**

2. Place the cursor in the field(s) you want to edit. In this example, the Reserve Item Type is edited by changing it from Book to 1 day reserve item.

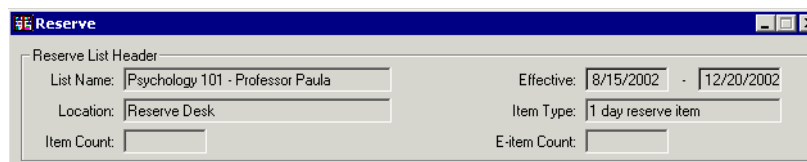


---

**Figure 8-13. Editing the Reserve Item Type in the Reserve List Header**

3. Click **OK** to save the new header information. Otherwise, click **Cancel** to close the dialog box without saving your changes.

Result: The Reserve List Header is edited and the system returns to the **Reserve** workspace (see [Figure 8-14](#)).



---

**Figure 8-14. Reserve List Header after editing**

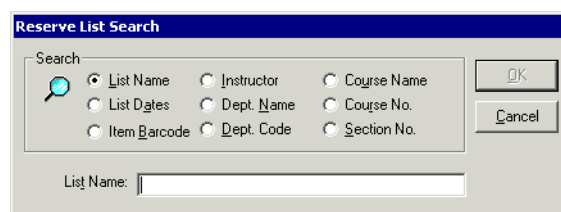
---

## Searching for a Course Reserve List

Operators can access Course Reserve Lists by using the **Reserve List Search** dialog box.

Operators can search for a list by the List Name, List Dates, Instructor, Department Name, Department Code, Course Name, Course Number, and Section Number.

When you select an option button in the **Reserve List Search** dialog box, the lower portion of the dialog box updates and display the correct field(s) so you can enter the searching information.



**Figure 8-15. Reserve List Search Dialog Box**

[Table 8-5](#) describes the **Reserve List Search** dialog box.

**Table 8-5. Reserve List Search**

Name	Description
List Name radio button	Searches for a list using the course reserve list name as the search criteria.
List Dates radio button	Searches for a list using the course reserve list effective dates as the search criteria.
Item Barcode radio button	Searches for a list using a barcode of an item belonging to the course reserve list name as the search criteria.
Instructor radio button	Searches for a list using the Instructor listed on the course reserve list name as the search criteria.
Dept. Name radio button	Searches for a list using the department name listed on the course reserve list name as the search criteria.
Dept. Code radio button	Searches for a list using the department code listed on the course reserve list name as the search criteria.
Course Name radio button	Searches for a list using the course name linked to the course reserve list as the search criteria.
Course Number radio button	Searches for a list using the course number linked to the course reserve list as the search criteria.

**Table 8-5. Reserve List Search**

Name	Description
Section Number radio button	Searches for a list using the section number linked to the course reserve list as the search criteria.
Search field	<p>Enter search terms in this field. It is dependant on the type of search being conducted.</p> <p>For example, if searching by Instructor the field is the Last Name field.</p> <p>The system automatically truncates search terms. For example, searching for "bio" returns reserve lists for "Biology," "Biological Theory," "Bioethics," and so on.</p>



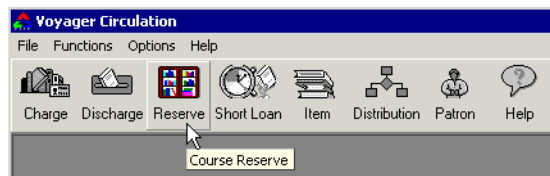
---

**Procedure 8-3. Searching for a Course Reserve List**

---

Use the following to search for a Course Reserve List:

1. Select **Reserve** from the **Functions** menu or click the **Reserve** button (Figure 8-16) on the Circulation toolbar.

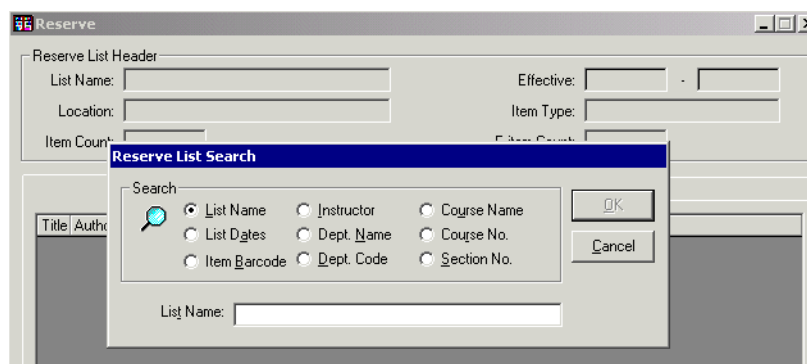


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**Figure 8-16. Reserve Button**

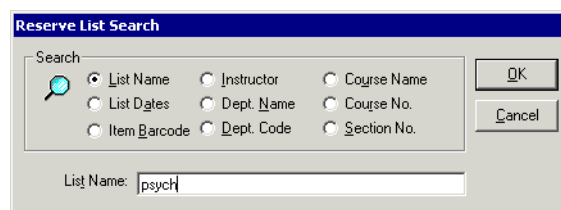
Result: The **Reserve** workspace opens with the **Reserve List Search** dialog box displaying (see [Figure 8-17](#)).





**Figure 8-17. Reserve List Search Dialog Box**

2. Select an option button for the type of search to conduct and enter the appropriate search term for the Course Reserve list (see [Figure 8-18](#)).



**Figure 8-18. Example of a Course Reserve List Name Search**

3. Click **OK** to perform the search. Otherwise, click the **Cancel** button to cancel the search.

Result: There are three search result options.

- a. A reserve list matching the search criteria was not found (see [Figure 8-19](#)).



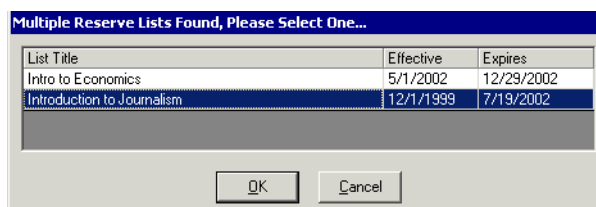
**Figure 8-19. Reserve List Not Found Message**

- b. A single reserve list was found and it automatically displays (see [Figure 8-20](#)).

A screenshot of a "Reserve" window. The window has a blue title bar and standard window controls. It is divided into several sections. The top section, "Reserve List Header", contains fields for "List Name" (Psychology 101 - Professor Paula), "Effective" dates (8/15/2002 - 12/20/2002), "Location" (Reserve Desk), "Item Type" (1 day reserve item), "Item Count" (5), and "E-item Count" (0). Below this is a table with two tabs: "Items" (selected) and "E-Items". The "Items" tab displays a table with columns: Title, Author, Barcode, Call Number, Location, and Item. A single row is visible for a book by Freud, Sigmund. At the bottom of the window is a section titled "Linked Courses:" with a table that has columns for Department, Instructor, Course, and Section, but it is currently empty.

**Figure 8-20. Reserve List Displays**

- c. Multiple reserve lists are found. The **Multiple Reserve Lists Found** dialog box opens (see [Figure 8-21](#)).

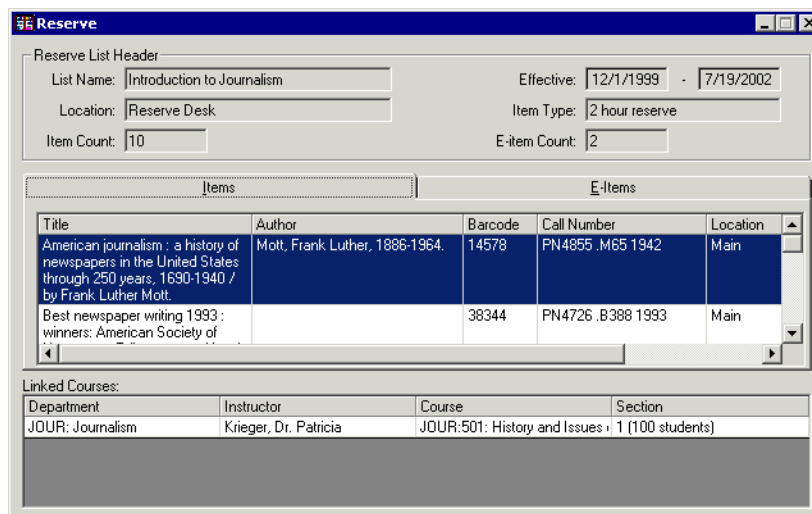


**Figure 8-21. Multiple Reserve Lists Found Dialog Box**

The **Multiple Reserve Lists Found** dialog box lists the title of the Reserve lists and their corresponding beginning and ending dates.

4. Select a Reserve list from the dialog box (or double-click on the list wanted).

Result: The list opens (see [Figure 8-22](#)).



**Figure 8-22. List Selected from the Multiple Reserve Lists Found Dialog Box Opens**

## Searching for a Course Reserve List from an Open List

---

Once you have retrieved a reserve list, you can search for another reserve list in two ways. You can search for a specific item within a course reserve list and for a specific course reserve list from within a list.



### Procedure 8-4. Searching for a Course Reserve List by Item

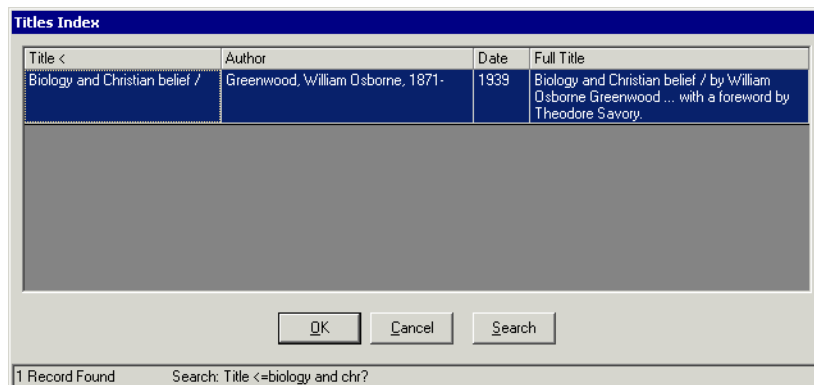
---

Use the following to search for a list by item from an open list:

1. From an open reserve list select **Search> For Item (Ctrl + F)** from the **Reserve** menu (or right-click in the header and select the same command from the submenu).

Result: The **Search** dialog box opens.

2. Perform a search for the item. See [Searching for an Item](#) on [page 3-11](#).
3. Select the title from the **Titles Index** ([Figure 8-23](#)) and click **OK**.

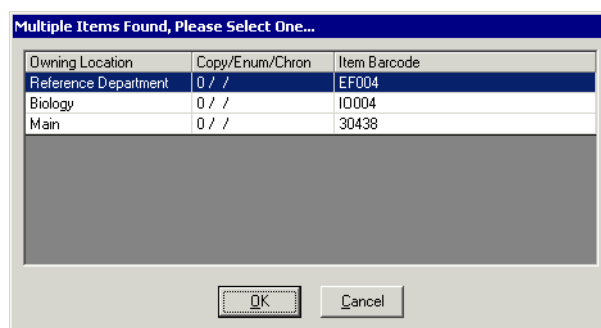


---

**Figure 8-23. Titles Index**

#### NOTE:

If the title you select from the **Titles Index** has multiple holdings or items, the **Multiple Items Found** dialog box opens (see [Figure 8-24](#)). If this is the case, select the correct item from this dialog box.



**Figure 8-24. Multiple Items Found Dialog Box**

Result: The reserve list on which the title is listed opens (see [Figure 8-25](#)).

A window titled "Reserve" with a "Reserve List Header" section. It contains fields for "List Name" (Biology and Ethics), "Location" (Reserve Desk), "Item Count" (1), "Effective" dates (8/12/2002 to 12/19/2003), "Item Type" (Book), and "E-item Count" (0). Below this is a table with two tabs: "Items" and "E-Items". The "Items" tab is active, showing a table with columns: Title, Author, Barcode, Call Number, Location, and Item Type. The table contains one row for "Biology and Christian belief / by William Osborne Greenwood... with a foreword by Theodore Savory." with author "Greenwood, William Osborne, 1871-" and barcode "30438". Below the table is a "Linked Courses" section with a table showing Department (BIO: Biology), Instructor (Hall, Dr. Monty), Course (BIO:730: Genetics), and Section (1 (25 students)).

Title	Author	Barcode	Call Number	Location	Item Type
Biology and Christian belief / by William Osborne Greenwood... with a foreword by Theodore Savory.	Greenwood, William Osborne, 1871-	30438	BL262 .G74 1939	Main	Book

Department	Instructor	Course	Section
BIO: Biology	Hall, Dr. Monty	BIO:730: Genetics	1 (25 students)

**Figure 8-25. Reserve List Opens**

**NOTE:**

If the title is not currently listed on any reserve list, the message Reserve List Not Found displays.



---

**Figure 8-26. Reserve List Not Found Message**

---



### **Procedure 8-5. Searching for a List from within a Course Reserve List**

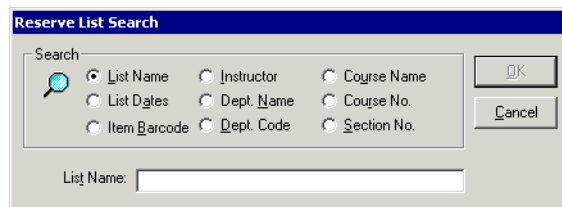
---

Use the following to search for a list from within a course reserve list:

1. From an open reserve list select **Search> For List** from the **Reserve** menu (or right-click in the header and select the same command from the submenu).

Result: The **Reserve List Search** dialog box opens (see [Figure 8-27](#)).

---



---

**Figure 8-27. Reserve List Search Dialog Box**

---

2. Search for a list by the List Name, List Dates, Instructor, Department Name, Department Code, Course Name, Course Number, and Section Number. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
- 

### **Displaying a Search Index**

You can re-display a search index after you have searched for an item or a reserve list.



---

**Procedure 8-6. Displaying a Search Index**

---

Use the following to display a search index:

1. Select **Search** from the **Reserve** menu (or right-click and select Search from the submenu).
2. Select any of the following display types:
  - a. **Display Headings Index...** to retrieve the results of the last heading search performed.
  - b. **Display Keyword Index...** to retrieve the results of the last keyword search performed.
  - c. **Display List Index...** to retrieve the last **Multiple Reserve Lists Found** dialog box displayed.
  - d. **Display Item Index...** to retrieve the last **Multiple Items Found** dialog box displayed.

Result: The corresponding index or dialog box opens.

---

---

**Adding Items to a Reserve List: Physical Items**

---

Physical items are things such as magazines, books, maps, and photocopies—things that are tangible and have a barcode. Physical items display on the **Items** tab of the reserve list (see [Figure 8-28](#)).

**Reserve List Header**

List Name: Psychology 101 - Professor Paula      Effective: 8/15/2002 - 12/20/2002

Location: Reserve Desk      Item Type: 1 day reserve item

Item Count: 3      E-item Count: 0

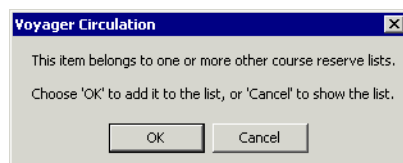
Title	Author	Barcode	Call Number	Location	Item
Personal psychopathology: early formulations. With introd. by Helen Swick Perry.	Sullivan, Harry Stack, 1892-1949.	75559	RC454.4 .S94 1972	Main	Bo
Psychoanalysis and social theory / Ian Craib.	Craib, Ian, 1945-	08552	RC506 .C73 1990	Main	Bo
Psychoanalytical treatment of	Freud, Anna, 1895-	26821	150.195 F88	Main	Bo

**Figure 8-28. Items Tab of a Reserve List**

You can add physical items to a reserve list in the following ways:

- by barcode
- by searching for the title in the database
- by copying items from another reserve list
- by creating and adding an item *on-the-fly*

When adding items to the list if they already belong to another reserve list, the system alerts the operator with a message as shown in [Figure 8-29](#).



**Figure 8-29. Message Alerting Operator That the Item is on Another Reserve List**

**NOTE:**

When physical items are added to the **Items** tab, they are automatically sorted in alphabetical order. Use the sorting option to change the order of the list. If the **Items** tab lists more than one item, click a column header, such as Title, to organize the display in ascending or descending sort order by title. Click the column header a second time to reverse the sort by title.



In addition, you can select one or more items at one time on the **Items** tab. To select one or more items on a reserve list, hold the **Ctrl** key down while selecting each item. To select **all** items on a reserve list, select the first item on the list then hold the **Shift** key down and select the last item on the list.



### Procedure 8-7. Adding a Physical Item by Barcode

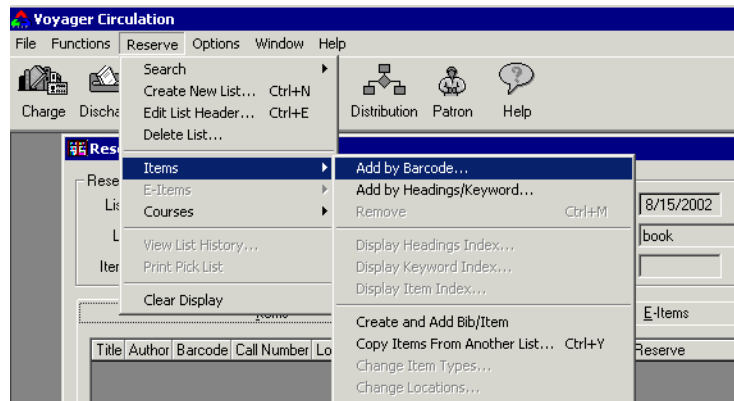
Use the following to add physical items to a reserve list by barcode:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page 8-14.

Result: The **Reserve** workspace opens (see [Figure 8-30](#)).

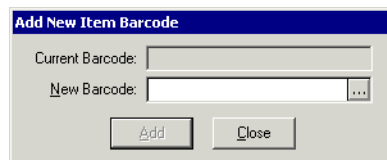
Figure 8-30. Reserve Workspace

2. Click the **Items** tab of an open reserve list in the **Reserve** workspace.
3. Select **Items> Add by Barcode** from the Reserve menu or right-click and select **Add by Barcode** from the **Items** tab as shown in [Figure 8-31](#).



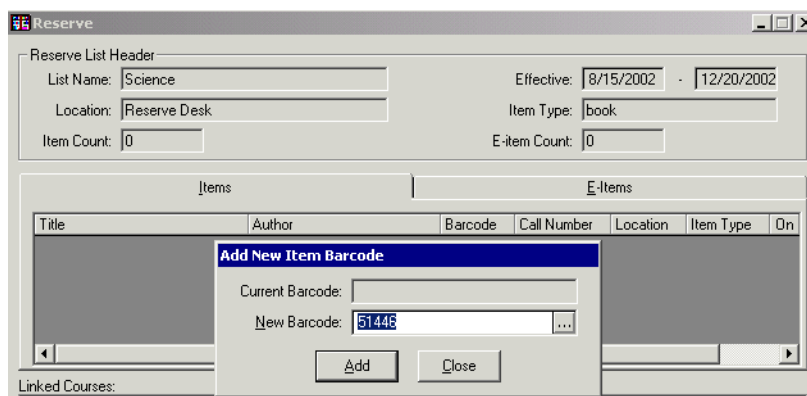
**Figure 8-31. Add by Barcode Command**

Result: The **Add New Item Barcode** dialog box opens (see [Figure 8-32](#)).



**Figure 8-32. Add New Item Barcode Dialog Box**

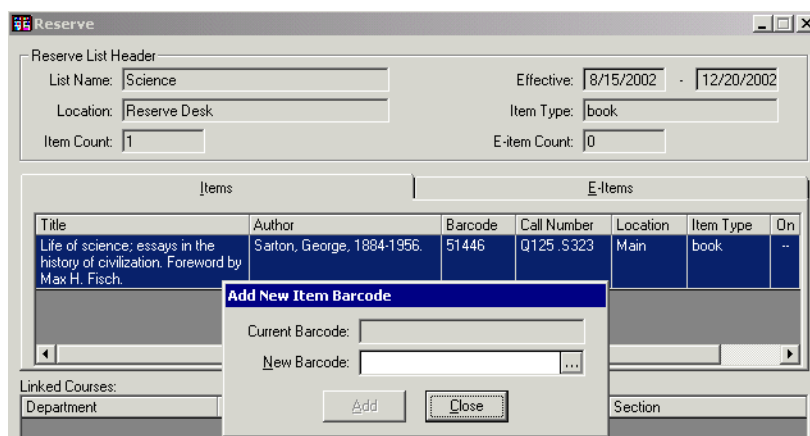
4. Enter barcode(s) using any of the following methods:
  - a. Either type the barcode in the **New Barcode** field or scan the barcode (see [Figure 8-33](#)).



**Figure 8-33. Enter a Barcode in the Add New Item Barcode Dialog Box**

- b. Click the **Add** button (or click **Enter** on your keyboard).

Result: The item is added to the list. It displays on the **Items** tab. The system then returns to the **Add New Item Barcode** dialog box (see [Figure 8-34](#)).



**Figure 8-34. After Adding the Item the System Returns to the Add New Item Barcode Dialog Box**

5. Add additional barcodes if wanted.
6. When finished adding barcodes, click the **Close** button.

Result: The **Add New Item Barcode** dialog box closes. The **Items** tab with newly-added items displays (see [Figure 8-35](#)).

---

The screenshot shows the 'Reserve' dialog box with the 'Items' tab selected. The 'Reserve List Header' section contains the following fields:

- List Name: Science
- Effective: 8/15/2002 - 12/20/2002
- Location: Reserve Desk
- Item Type: book
- Item Count: 4
- E-item Count: 0

The 'Items' table displays the following data:

Title	Author	Barcode	Call Number	Location	Item
Integrated basic science [by] Stewart M. Brooks.	Brooks, Stewart M. (Stewart Marshall)	90558	QP34 .B84 1970	Main	book
Life of science; essays in the history of civilization. Foreword by Max H. Fisch.	Sarton, George, 1884-1956.	51446	Q125 .S323	Main	book
Teaching science through	Carin, Arthur A.	58948	LB1585 .C28 1985	Main	book

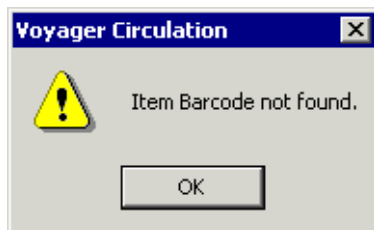
---

**Figure 8-35. Items Tab with Items Added**

**NOTE:**

If a barcode entered is not found in the system, the **Item Barcode not found** message displays (see [Figure 8-36](#)). In this case click the **OK** button and enter a new barcode.

---



---

**Figure 8-36. Item Barcode Not Found Message**

---



### Procedure 8-8. Adding a Physical Item by Headings/Keyword Searching

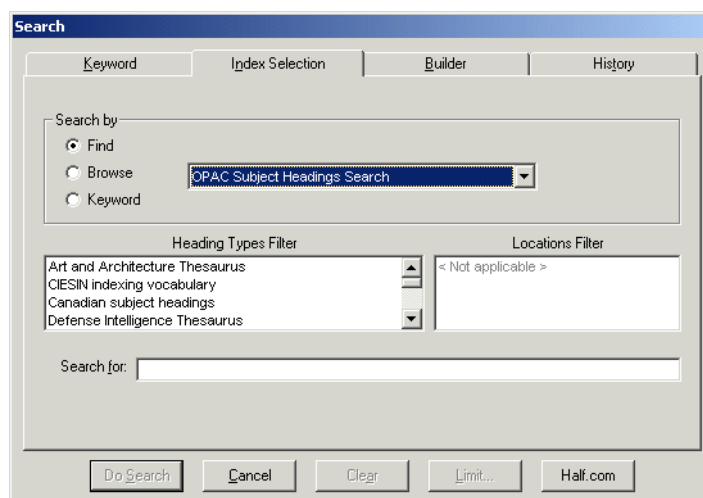
Use the following to add an item after performing a Headings or Keyword search:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page 8-14.

Result: The **Reserve** workspace opens.

2. Click the **Items** tab of an open reserve list in the **Reserve** workspace.
3. Select **Items> Add by Headings/Keyword** from the **Reserve** menu or (right-click and select the same command from the submenu).

Result: The **Search** dialog box opens (see [Figure 8-37](#)).



**Figure 8-37. Search Dialog Box**

4. Perform a search. See [Searching for an Item Using Keyword, Headings/Index Selection, and Builder Searches](#) on page 3-15.
5. When the search is complete, select a title from the **Titles Index**.

Result: The title is automatically added to the **Items** tab of the reserve list.



---

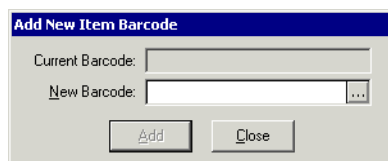
### Procedure 8-9. Adding Many Items to a Course Reserve List by Searching for the Item

---

Use the following to add more than one item at a time to a course reserve list by searching for the item:

1. After logging in to the Circulation module, search for and display a Reserve List to which you want to add the items. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. From the Reserve menu select **Items> Add by Barcode** (or with the cursor on the **Items** tab, right-click and select **Add by Barcode**).

Result: The **Add New Item Barcode** dialog box opens (see [Figure 8-38](#)).



---

**Figure 8-38. Add New Item Barcode Dialog Box.**

3. Click the ellipses button in the **New Barcode** field to search for items.

Result: The **Search** dialog box opens (see [Figure 8-39](#)).

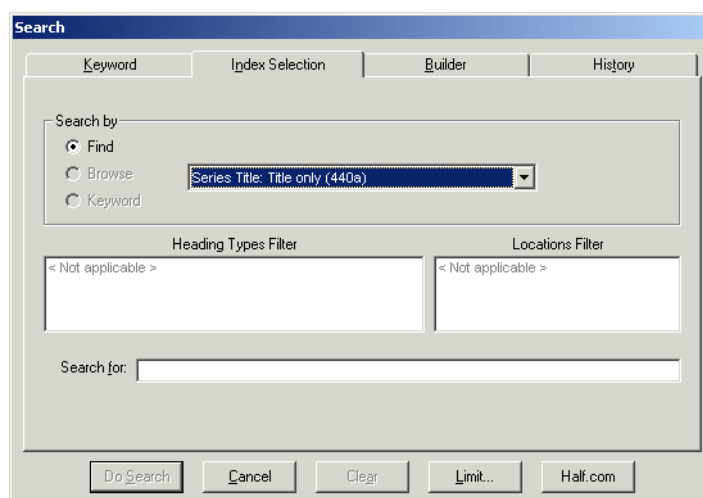


Figure 8-39. Search Dialog Box

4. Enter the appropriate search terms and click the **Do Search** button. The **Titles Index** opens (see [Figure 8-40](#)).

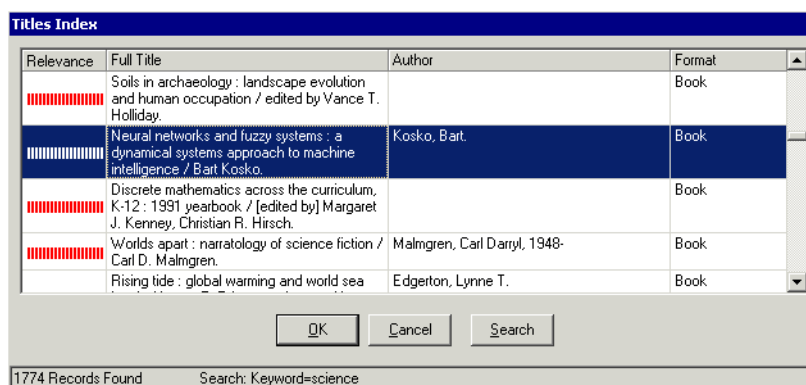


Figure 8-40. Titles Index

5. Select the title you want to add to the reserve list. Select it and click the **OK** button.

Result: The system adds the title to the list. It is listed on the **Items** tab. The **Add New Item Barcode** dialog box remains open.

6. Add additional barcodes if wanted, by either entering them or searching for items.
7. When finished adding items, click the **Close** button.

Result: The **Add New Item Barcode** dialog box closes. The **Items** tab with newly-added items displays.

---

## **Adding Additional Items**

---

If you need to add additional copies of something to the reserve list, you cannot add them through course reserve. You must add them from the **Item** dialog box by clicking **Item> Add Item** on the main menu. See [Adding, Editing, and Deleting Item Records](#) on [page 5-55](#).

For example, if you have photocopies that you want to put on reserve in addition to the original document, you must go to the item record for the original document and create additional item records for each set that you want to put on course reserve.

However, if you have an item that does not currently exist in your database, you can create bibliographic, holdings, and item records *on-the-fly* and add item to a reserve list.

## **Creating and Adding a Bib / Item “On-the-fly”**

---

You can create items that do not currently exist in your database and add them to a reserve list. For example, a faculty member may allow their personal copy of an item to be used as a reserve item. You can create the bibliographic, holdings, and item records for the item in the Reserve function and then add the item to the appropriate reserve list.



### **IMPORTANT:**

*You can choose to suppress from WebVoyage any items created on-the-fly when using the Reserve function. If this option is selected, items created on-the-fly only display in WebVoyage by performing a Course Reserve search. They do not display in WebVoyage if a patron conducts a regular search (for example, by title or author) for that item.*

Suppressing the items from displaying in *WebVoyage* is done in the System Administration module. The **OPAC Suppress for Item on the Fly** check box on the **Locations Settings** dialog box (as shown in [Figure 8-41](#)) should be selected



for the happening desk where the items are created. This is found in the **Circulation - Policy Definitions** workspace under the **Locations** tab. See *Locations Tab* in the *Voyager System Administration User's Guide* for information.

**Figure 8-41. Locations Settings Dialog Box with Suppress from OPAC Selected**

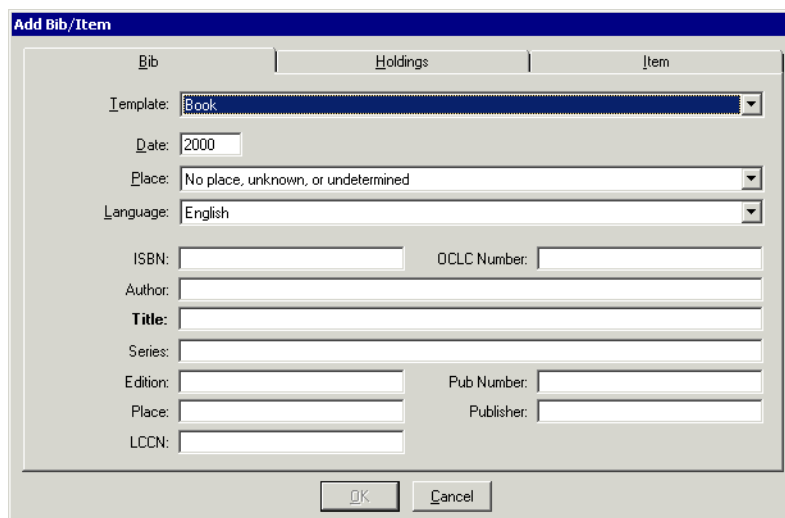


### **Procedure 8-10. Creating an Item On-the-Fly**

Use the following to create an item on-the-fly:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Click the **Items** tab of an open reserve list and select **Items> Create and Add Bib/Items** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The **Add Bib/Item** dialog box opens (see [Figure 8-42](#)).



---

**Figure 8-42. Add Bib/Item Dialog Box**

3. Complete the tabs of the **Add Bib/Item** dialog box. See [Adding Bibliographic, Holdings, and Item Records](#) on [page 5-37](#).
4. Click **OK** to save the records and add the information to the Course Reserve list. Otherwise, click **Cancel** to close the dialog box without saving your changes.

Result: If clicked **OK** the item is created and added to the list.

---

## Copying Physical Items from Another List

---

You can copy items from one reserve list to another.



### Procedure 8-11. Copying Physical Items from Another List

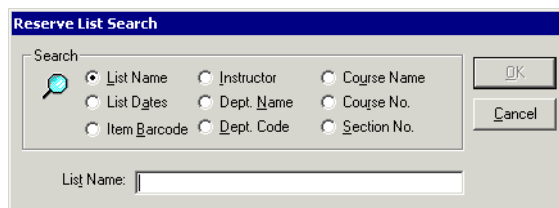
---

Use the following to copy items from one reserve list to another:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on [page 8-14](#).

2. Click the **Items** tab of an open reserve list in the **Reserve** dialog box and select **Items> Copy Items From Another List (Ctrl + Y)** from the **Reserve** menu (or right-click the **Items** tab on the **Reserve** dialog box and choose the same command from the submenu).

Result: The **Reserve List Search** dialog box opens (see [Figure 8-43](#)).



**Figure 8-43. Reserve List Search Dialog Box**

3. Search for the reserve list containing the items you want to copy.
4. Select a list and click **OK**.

Result: All of the items are copied onto the **Items** tab of the open reserve list.

## Removing Physical Items from a Reserve List

Operators may remove physical items from a reserve list.

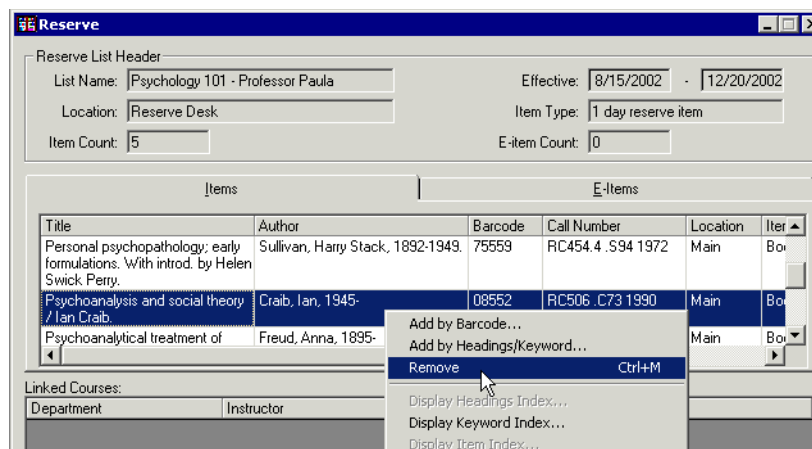


### Procedure 8-12. Removing Physical Items from the Items Tab of a Reserve List

Use the following to remove physical items from a reserve list:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. On the **Items** tab of an open Reserve list, select the item(s) you want to remove.

3. Select **Items > Remove (Ctrl + M)** from the **Reserve** menu or right-click the **Items** tab and select the same command from the submenu (see [Figure 8-44](#)).



---

**Figure 8-44. Selecting an Item to Remove**

Result: The item(s) is immediately removed from the list.

**NOTE:**

Operators can select one or more items at one time on the **Items** tab. To select one or more items on a reserve list, hold the **Ctrl** key down while selecting each item. To select **all** items on a reserve list, select the first item on the list then hold the **Shift** key down and select the last item on the list.

---

## Changing Physical Item Types and Locations

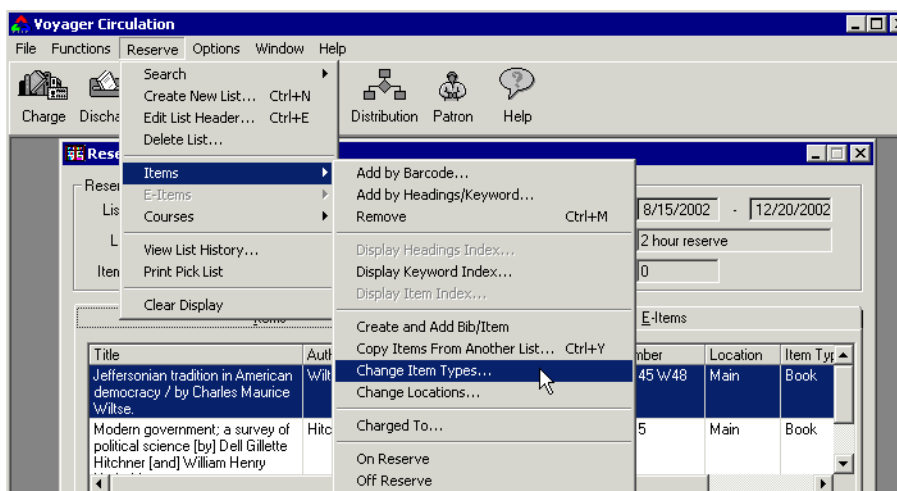
Operators can change the physical item types and physical item locations for reserve list items. Some of the items in your reserve list may have different circulation rules that need to be temporarily changed because they belong to another policy group. If this is the case, you may want to change the item types or locations on an item by item basis.



### Procedure 8-13. Changing the Physical Item Types and/or Locations

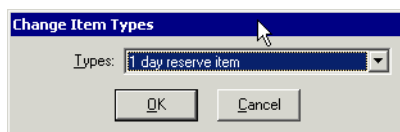
Use the following to change item type and/or locations for an item on a reserve list:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select an item on the **Items** tab and select **Items> Change Item Types** (or **Change Locations**) from the **Item** submenu (see [Figure 8-45](#)).



**Figure 8-45. Selecting the Change Item Types from the Item Submenu**

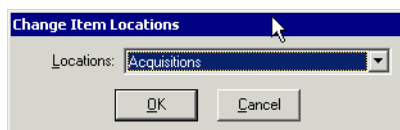
Result: The **Change Item Types** or **Change Locations** dialog box opens (see [Figure 8-46](#) and [Figure 8-47](#)).



---

**Figure 8-46. Change Item Types Dialog Box**

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---

**Figure 8-47. Change Item Locations Dialog Box**

---

3. Select an option from the drop-down list.
4. Click **OK** to accept your changes. Otherwise, click **Cancel** to close the **Change Item Types** (or **Locations**) dialog box.

Result: The changes are made.

---

## Placing Items On Reserve (Reserving Items)

---

Once items have been added to a reserve list, you can change the status of the items to On Reserve. This can be done using a batch job as well, see [Course Reserve Batch Jobs](#) on [page 8-70](#).



### Procedure 8-14. Placing Items On Reserve Manually (Reserving Items)

---

Use the following to place an item that is on a reserve list On Reserve:

1. After logging in to the Circulation module, search for and display a Reserve List whose items should be placed On Reserve. See [Procedure 8-3, Searching for a Course Reserve List](#), on [page 8-14](#).

- From the **Items** tab in the **Reserve** workspace, select the line item(s) you want to place On Reserve and select **Items> On Reserve** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The item's status is changed to On Reserve (see [Figure 8-48](#)). The status in the On Reserve column changes to **Yes** followed by a zero in parenthesis. This counter increments each time the reserve item is charged to a patron and then discharged when the item is returned.

Also, the information in the Location and Item Type columns automatically switches to the Location and Item Type specified in the Reserve List Header.



#### IMPORTANT:

*The items on the **Items** tab must be turned On Reserve for the reserve list to be active and searchable in WebVoyage.*

The screenshot shows the 'Reserve' workspace. At the top is the 'Reserve List Header' with the following fields:

- List Name: Political Science 101
- Location: Government Documents
- Item Count: 3
- Effective: 8/15/2002 - 12/20/2002
- Item Type: 2 hour reserve
- E-item Count: 0

Below the header is a table with two tabs: 'Items' (selected) and 'E-Items'. The 'Items' tab contains the following data:

Author	Barcode	Call Number	Location	Item Type	On Reserve
Wiltse, Charles Maurice, 1907-	16103	JC176.J45'W48	Government Document	2 hour reserve	Yes (0)
Hitchner, Dell Gillette.	55656	JA66 .H5	Main	Book	--

At the bottom of the workspace is a 'Linked Courses' section with a table that has columns for Department, Instructor, Course, and Section. The table is currently empty.

**Figure 8-48. Item's Status Changed to On Reserve**

## Unreserving Items

---

Operators can change the status of reserve items to Off Reserve when you no longer want the item or reserve list to be active in WebVoyage. This can be done using a batch job as well, see [Course Reserve Batch Jobs](#) on [page 8-70](#).



### Procedure 8-15. Unreserving Items Manually

---

Use the following to unreserve an item, that is to change the status to Off Reserve:

1. After logging in to the Circulation module, search for and display a Reserve List whose items should be placed Off Reserve. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. From the **Items** tab in the **Reserve** dialog box, select the line item(s) you want to take Off Reserve and select **Items> Off Reserve** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The item's status is changed to Off Reserve (see [Figure 8-49](#)). The status in the On Reserve column changes to a double dash symbol ( -- ). The counter information is removed.

Also, the information in the Location and Item Type columns automatically switches back to the permanent Location and Item Type specified in the item record.



The screenshot shows a window titled 'Reserve' with a 'Reserve List Header' section. It contains fields for 'List Name' (Political Science 101), 'Effective' dates (8/15/2002 to 12/20/2002), 'Location' (Government Documents), 'Item Type' (2 hour reserve), 'Item Count' (3), and 'E-item Count' (1). Below this is a table with two tabs: 'Items' and 'E-Items'. The 'Items' tab is active, showing a table with columns: Author, Barcode, Call Number, Location, Item Type, and On Reserve. Two items are listed: 'Wiltse, Charles Maurice, 1907-' and 'Hitchner, Dell Gillette.'. Both have 'On Reserve' status set to '--'. At the bottom, a 'Linked Courses' section shows a table with columns: Department, Instructor, Course, and Section. The data row shows 'PS: Political Science', 'Smartlady, Dr. Emma', 'PS 101: Introduction to Politica', and 'A1 (250 students)'.

Reserve List Header					
List Name:	Political Science 101		Effective:	8/15/2002 - 12/20/2002	
Location:	Government Documents		Item Type:	2 hour reserve	
Item Count:	3		E-item Count:	1	

Items					
Author	Barcode	Call Number	Location	Item Type	On Reserve
Wiltse, Charles Maurice, 1907-	16103	JC176.J45 W48	Main	Book	--
Hitchner, Dell Gillette.	55656	JA66 .H5	Main	Book	--

Linked Courses:			
Department	Instructor	Course	Section
PS: Political Science	Smartlady, Dr. Emma	PS 101: Introduction to Politica	A1 (250 students)

**Figure 8-49. Item Status of Off Reserve**

**NOTE:**

Once an item is turned Off Reserve, the counter information is removed and cannot be recovered. If you keep track of these statistics, be sure to make note of the counter before turning the item Off Reserve.

Also, this is the only way to reset the counter. If you need to reset the counter back to zero for some reason, turn the item Off Reserve and then back On Reserve.

## **Adding Items to a Reserve List: E-Items**

E-Items are electronic journals or other resources that are available via the Web. They are only created in the Reserve function of the Circulation module. You can create new e-items, edit or delete existing e-items, and add or remove e-items from a reserve list. To perform any of these functions, the **E-Items** tab of an open reserve list must be selected (see [Figure 8-50](#)).

**Reserve List Header**

List Name:  Effective:  -

Location:  Item Type:

Item Count:  E-item Count:

Items						E-Items	
E-Item ID	Title	Author	Call Number	Enum	Chron	E-Item Caption	Link/URL
151	Recent Developments in Gene Therapy Research					Gene Therapy Research Developments	<a href="http://www.esources/H...edicine/gen...cent/sci/tec...n_Genome/ap...py.shtml#re...">http://www.esources/H...edicine/gen...cent/sci/tec...n_Genome/ap...py.shtml#re...</a>

**Linked Courses:**

Department	Instructor	Course	Section
BIO: Biology	Hall, Dr. Monty	BIO:730: Genetics	1 (25 st

**Figure 8-50. Reserve List E-Items Tab**

### Adding New E-Items to a Reserve List

You can create new electronic items and add them to a reserve list in the following ways.

- Create an e-item, holdings, and bibliographic record.
- Create a new e-item and holdings record and linking it to an existing bibliographic record.
- Add a new e-item and linking it to an existing bibliographic and holdings record.

**NOTE:**

Electronic items cannot be added by barcode.

E-item information is created and stored in the same way that physical item information is created and stored.

For example, the e-item information is created on a Voyager-defined e-item template and item information is created on an Voyager-defined item template.

Also, the resulting e-item record is attached to a holdings record just as an item record is attached to a holdings record. However, e-item records can only be viewed and maintained from the e-items tab of a reserve list in the Circulation module. The inability to view an e-item in WebVoyage is the only difference.

To facilitate easier identification and access to relevant information, you can sort all display columns in Voyager Circulation. If the **E-Items** tab lists more than one e-item, a click of the column header, such as Title, organizes the display in ascending or descending sort order by title; a second click of the same header reverses the sort by title.



---

**Procedure 8-16. Adding an E-Item, Holdings and Bib**

---

Use the following to add a new electronic item, holdings, and bibliographic record to the list:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select **E-Items> Add New Item, Holding and Bib Record** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The **Create E-Item and Attach to New Bib and Holdings Record** dialog box opens (see [Figure 8-51](#)).

The screenshot shows a dialog box titled "Create E - Item and Attach to New Bib and Holdings Record". It has three tabs: "Bib", "Holdings", and "E - Item". The "Bib" tab is selected. The form contains the following fields:

- Template:** A drop-down menu with "Other" selected.
- Date:** A text box with "2002".
- Format:** A drop-down menu with "Book" selected.
- Place:** A drop-down menu with "United States" selected.
- Language:** A drop-down menu with "English" selected.
- Title:** A text box.
- Author:** A text box.
- Edition:** A text box.
- Publisher:** A text box.
- Place:** A text box.
- Series:** A text box.
- System No.:** A text box.
- LCCN:** A text box.
- ISSN:** A text box.
- ISBN:** A text box.
- Other:** A text box.

At the bottom are "OK" and "Cancel" buttons.

---

**Figure 8-51. Bib Tab of the Create E-Item and Attach New Bib and Holdings Record Dialog Box**

3. Choose a bibliographic template from the drop-down list in the **Template** field.
4. Enter information onto the **Bib**, **Holdings**, and **E-Items** tabs.

Required fields are indicated by a boldface font. You must enter information in the **Title** field on the **Bib** tab and the **Link Caption** and the **Link/URL** fields on the **E-Item** tab (see [Figure 8-52](#)).

The Web link must be the full address and must be preceded by http:// or another protocol.

The **Link/URL** field may be up to 2048 characters in length and is Unicode compliant.



**IMPORTANT:**

*Information entered into the **URL** field is not stored in an 856 field of the bibliographic or holdings record, but is stored in the e-item record that is attached to the holdings record.*

The screenshot shows a dialog box titled "Create E - Item and Attach to New Bib and Holdings Record". It has three tabs: "Bib", "Holdings", and "E - Item". The "E - Item" tab is selected. The form contains the following fields:

- Enumeration: [text input]
- Chronology: [text input]
- Year: [text input]
- Link Caption: [text input]
- Link / URL: [text input with vertical scroll bar]
- Note: [text input with vertical scroll bar]
- Note Type: [dropdown menu showing "Public"]

At the bottom are "OK" and "Cancel" buttons.

Figure 8-52. E-Item Tab for Create E-Item

You may enter the Enumeration, Chronology, Year, Note (a free text field), and Note type (public or staff).



**TIP:**

Work your way through each of the tabs before clicking the **OK** button. Remember that clicking **OK** means that a bibliographic, holdings, and e-item record has been added to the database. If you need to edit any of the bibliographic or holdings information just created, you must do so in the Cataloging module. You can only edit e-item record information from the **E-Items** tab of a reserve list in the Circulation module.

5. Click **OK** to save the records and add the information to the Course Reserve list. Otherwise, click **Cancel** to close the dialog box without saving your changes.

**NOTE:**

You can customize existing templates or create new templates for adding bibliographic records to the database. For more information see "[Circbib.cfg file - Customizing the Bib Tab Fields](#) on [page 5-39](#)".



---

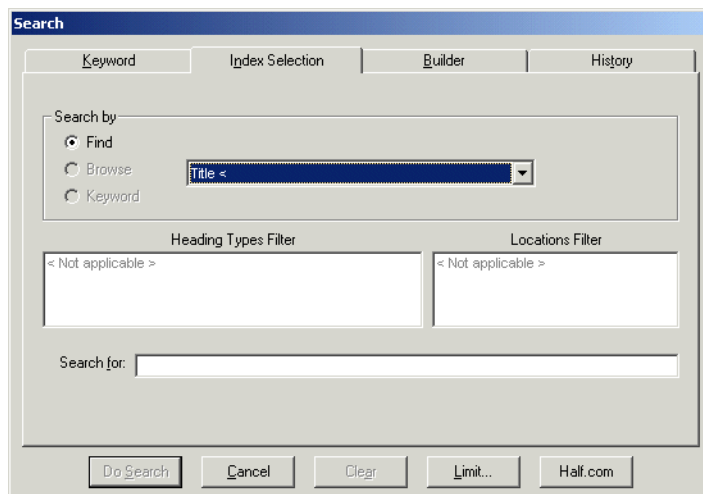
**Procedure 8-17. Add New E-Item/Holding to Bib Record**

---

Use the following to add a new E-Item and new Holdings record and link it to an existing bibliographic record:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on [page 8-14](#).
2. Select the **E-Items** tab and select **E-Items> Add New E-Item/Holding to Bib Record** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The **Search** dialog box opens (see [Figure 8-53](#)).



---

**Figure 8-53. Search Dialog Box**

3. Enter your search terms and conduct your search. See [Searching for an Item](#) on [page 3-11](#). Select the wanted title from the resulting **Titles Index** and click **OK**.

Result: The **Add E-Item and Holding To Existing Bib Record** dialog box opens with the bibliographic information entered on the **Bib** tab (see [Figure 8-54](#)).

The screenshot shows a dialog box titled "Add E-Item and Holding To Existing Bib Record". It has three tabs: "Bib", "Holdings", and "E-Item". The "Bib" tab is active, displaying the following fields:

- Bib ID: 54977
- Title: Social science & medicine [electronic resource]
- Author:
- Edition:
- Pub. No.:
- Publisher: Pergamon
- Place/Date: Oxford ; New York : 19uu
- ISSN: 0277-9536
- Series:
- ISBN:
- System No.: (OCoLC)ocm39224682
- Owning Library: Branch Library
- LCCN:

At the bottom of the dialog box are "OK" and "Cancel" buttons.

**Figure 8-54. Add E-Item and Holding to an Existing Bib Record**

4. Enter information onto the **Holdings** and **E-Item** tabs.

Required fields are indicated by a boldface font. You must enter information in the **Link Caption** and the **Link/URL** fields on the **E-Item** tab (see [Figure 8-54](#)).

The Web link must be the full address and must be preceded by http:// or another protocol.

The **Link/URL** field may be up to 2048 characters in length and is Unicode compliant.



**IMPORTANT:**

*Information entered into the **URL** field is not stored in an 856 field of the bibliographic or holdings record, but is stored in the e-item record that is attached to the holdings record.*

You may enter the Enumeration, Chronology, Year, Note (a free text field), and Note type (public or staff).



**TIP:**

*Work your way through each of the tabs before clicking the **OK** button. Remember that clicking **OK** means that a bibliographic, holdings, and e-item record has been added to the database. If you need to edit any of the bibliographic or holdings information just created, you must do so in the Cataloging module. You can only edit e-item record information from the **E-Items** tab of a reserve list in the Circulation module.*

5. Click **OK** to save the records and add the information to the Course Reserve list. Otherwise, click **Cancel** to close the dialog box without saving your changes.

Result: If clicked **OK**, a new E-Item and new Holdings record is added and linked to an existing bibliographic record.



#### **Procedure 8-18. Add New E-Item to Bib/Holding Record**

---

Use the following to add a new E-Item to an existing bibliographic and holdings record:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select the E-Items tab and select **E-Items> Add New E-Item to Bib/Holding Record** from the **Reserve** menu (or right-click and select the same command from the submenu).

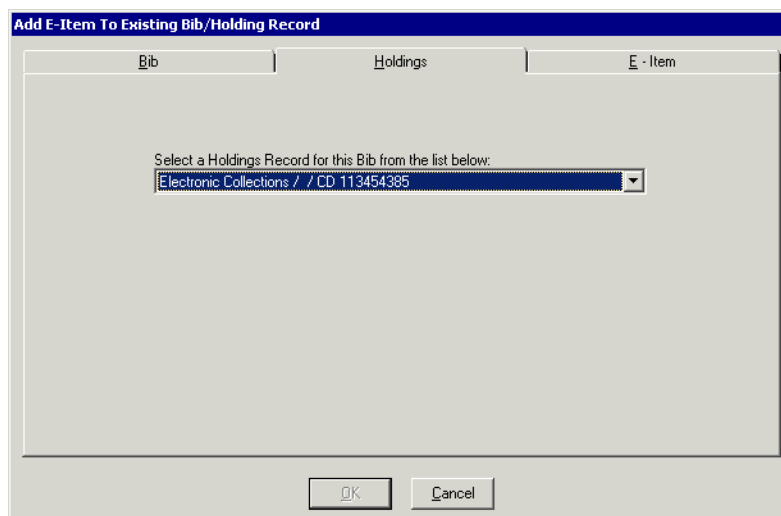
Result: The **Search** dialog box opens.

3. Enter your search terms and conduct your search. See [Searching for an Item](#) on [page 3-11](#). Select the wanted title from the resulting **Titles Index** and click **OK**.

Result: The **Add E-Item To Existing Bib/Holding Record** dialog box opens with the bibliographic and holdings information entered on the **Bib** and **Holdings** tabs.

4. Select a holdings record for the bib from the drop-down list on the **Holdings** tab (see [Figure 8-55](#)).





**Figure 8-55. Holdings Tab of the Add E-Item to Existing Bib/Holding Record Dialog Box**

5. Enter information onto the **E-Item** tab.

Required fields are indicated by a boldface font. You must enter information in the **Link Caption** and the **Link/URL** fields on the **E-Item** tab (see [Figure 8-55](#)).

The Web link must be the full address and must be preceded by http:// or another protocol.

The **Link/URL** field may be up to 2048 characters in length and is Unicode compliant.



**IMPORTANT:**

*Information entered into the **URL** field is not stored in an 856 field of the bibliographic or holdings record, but is stored in the e-item record that is attached to the holdings record.*

You may enter the Enumeration, Chronology, Year, Note (a free text field), and Note type (public or staff).



**TIP:**

*Work your way through each of the tabs before clicking the **OK** button. Remember that clicking **OK** means that a bibliographic, holdings, and e-item record has been added to the database. If you need to edit any of the bibliographic or holdings information just created, you must do so in the Cataloging module. You can only edit e-item record information from the **E-Items** tab of a reserve list in the Circulation module.*

6. When you are done entering information, click **OK** to save the information and add the item to the Course Reserve list. Otherwise, click **Cancel** to close the dialog box without saving your changes.

Result: A new E-Item is added to an existing bibliographic and holdings record

---



#### **Procedure 8-19. Adding Existing E-Items to a Reserve List**

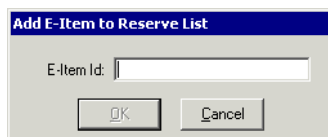
---

Use the following to add an existing E-item to a reserve list:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select the **E-Items** tab and select **E-Items> Add E-Item by ID Number** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The **Add E-Item to Reserve List** dialog box opens (see [Figure 8-56](#)).

---



---

**Figure 8-56. Add E-Item to Reserve List Dialog Box**

3. Enter the ID number of the E-item you want to add into the box and click **OK**.

Result: The E-item is added to the reserve list.

---



---

### Procedure 8-20. Editing E-Items

---

Use the following to edit an electronic item:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select an e-item from the **E-Items** tab and select **E-Items> Edit E-Item** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The **Edit E-Item** dialog box opens (see [Figure 8-57](#)).

**Edit E - Item**



E - Item ID:



Enumeration:

Chronology:

Year:

Link Caption:

Link / URL:   
  


Note:   
  



Note Type:  

Figure 8-57. E-Item Edit

3. Edit the contents of the screen.
4. Click **OK** to save your changes. Click **Cancel** to close the dialog box without saving your changes.

Result: The E-item is edited.

## Removing E-Items from a Reserve List

You can remove electronic items from a reserve list. When removing an item, the system checks to see if the e-item is on any other lists. If it is on another reserve list, the item is removed, but not deleted from the database. If the item is not on another reserve list, the e-item is completely deleted from the database.



---

**Procedure 8-21. Removing E-Items from a Reserve List**

---

Use the following to remove electronic items from a reserve list:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select the item(s) you want to remove on the **E-Items** tab.
3. Select **E-Items> Remove E-Item from List** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The item is immediately removed from the reserve list.

---

---

**Deleting E-Items**

---

Operators may delete E-Items from the database. This does not delete any bibliographic or holding records with which that e-item is associated. If you want to delete the bibliographic or holdings records, you must do so from the Voyager Cataloging module. See the *Voyager Cataloging User's Guide* for more information.



---

**Procedure 8-22. Deleting an E-Item from the Database**

---

Use the following to delete electronic items from the database:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select the item(s) you want to delete on the **E-Items** tab and select **E-Items> Delete E-Item** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: This removes the item from the reserve list and deletes the item record from the database.

---

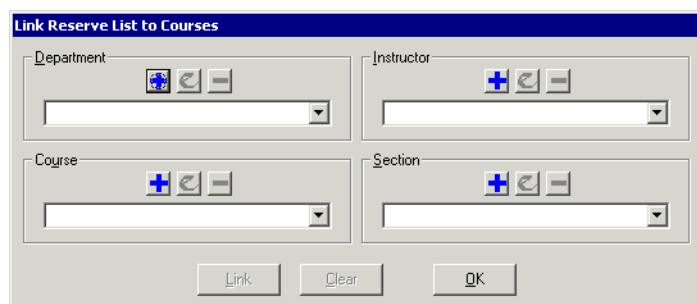
## Linking Reserve Lists to Course Information

---

Your institution's course information can be linked to one or more course reserve lists by using any or all of the following categories: Department, Instructor, Course, and Section. Once a course is linked, patrons are able to access the reserve list in WebVoyáge by selecting the **Course Reserve** tab and searching by the linking category.

[Figure 8-58](#) displays the **Link Reserve List to Courses** dialog box.

---



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**Figure 8-58. Link Reserve List to Courses Dialog Box**

[Table 8-6](#) describes the **Link Reserve List to Courses** dialog box.

**Table 8-6. Link Reserve List to Courses**

Name	Description
Department	In this section operators select the department to which this course reserve list should be linked.
Instructor	In this section operators select the instructor to which this course reserve list should be linked.
Course	In this section operators select the course to which this course reserve list should be linked.
Section	In this section operators select the section to which this course reserve list should be linked.

**Table 8-6. Link Reserve List to Courses**

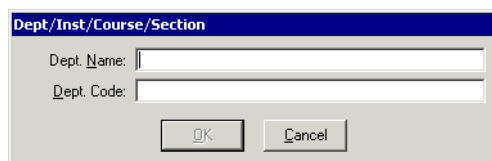
Name	Description
Plus button 	<p>This button is found in each section of the <b>Link Reserve List to Courses</b> dialog box.</p> <p>Opens the <b>Dept/Inst/Course/Section</b> dialog box.</p> <p>The fields that display correspond to the section from which the button was selected. For example, if the operator clicked the <b>Plus</b> button from the Department section, a dialog box with fields for the Department Name and Department Code display.</p> <p>See <a href="#">The Dept/Inst/Course/Section Dialog Boxes</a> on <a href="#">page 8-53</a>.</p>
Edit button 	<p>This button is found in each section of the <b>Link Reserve List to Courses</b> dialog box.</p> <p>Opens the corresponding <b>Dept/Inst/Course/Section</b> dialog box and the operator may make edits as needed.</p> <p>See <a href="#">The Dept/Inst/Course/Section Dialog Boxes</a> on <a href="#">page 8-53</a>.</p>
Minus button 	<p>This button is found in each section of the <b>Link Reserve List to Courses</b> dialog box.</p> <p>Deletes the corresponding department, instructor, course, or section. If linked to a reserve list the deletion is not allowed.</p> <p>See <a href="#">Deleting Course Information</a> on <a href="#">page 8-64</a>.</p>
Link button	<p>Links the department, instructor, course, and/or section to the reserve list and updates the Linked Courses section of the <b>Reserve</b> workspace.</p>

### **The Dept/Inst/Course/Section Dialog Boxes**

The **Dept/Inst/Course/Section** dialog box opens when the operator selects either the **Plus** or **Edit** buttons from the **Link Reserve List to Courses** dialog box. It is used to add or edit information about departments, instructors, courses, and sections available to be linked to the course reserve list.

### **Department Section**

When the **Plus** or **Edit** button is selected from the Department section of the **Link Reserve List to Courses** dialog box, the **Dept. Name** and **Dept. Code** fields are available in the **Dept/Inst/Course/Section** dialog box (see [Figure 8-59](#)).



---

**Figure 8-59. Dept/Inst/Course/Section Dialog Box - Department**

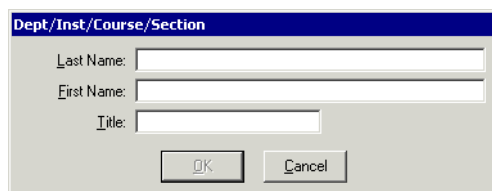
[Table 8-7](#) describes the department fields.

**Table 8-7. Dept/Inst/Course/Section dialog box- Department Information**

Name	Description	Required	Range
Dept. Name	Name of the department that offers the course to which the reserve list is linked.	Yes	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 40 characters
Dept. Code	Department code.	Yes	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 10 characters

## Instructor Section

When the **Plus** or **Edit** button is selected from the Instructor section of the **Link Reserve List to Courses** dialog box, the **Last Name**, **First Name**, and **Title** fields are available in the **Dept/Inst/Course/Section** dialog box (see [Figure 8-60](#)).



---

**Figure 8-60. Dept/Inst/Course/Section Dialog Box - Instructor**



[Table 8-8](#) describes the Instructor fields.

**Table 8-8. Dept/Inst/Course/Section dialog box- Instructor Information**

Name	Description	Required	Range
Last Name	Name of the instructor of the course to which the reserve list is linked.	Yes	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 50 characters
First Name	Instructor's first name.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 40 characters
Title	Instructor's title.	No	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 10 characters

### Course Section

When the **Plus** or **Edit** button is selected from the Course section of the **Link Reserve List to Courses** dialog box, the **Course Name**, **Course Number**, **Begins**, and **Ends** fields are available in the **Dept/Inst/Course/Section** dialog box (see [Figure 8-61](#)).

**Figure 8-61. Dept/Inst/Course/Section Dialog Box - Course**

[Table 8-9](#) describes the Course fields.

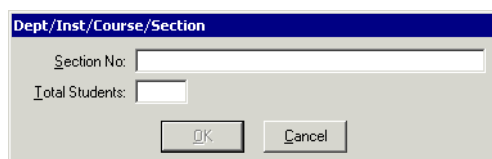
**Table 8-9. Dept/Inst/Course/Section dialog box- Course Information**

Name	Description	Required	Range
Course Name	Name of the course to which the reserve list is linked.	Yes	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 40 characters
Course No.	Course number.	Yes	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 10 characters
Begins	Beginning date for the course.	No	Date
Ends	Ending date of the course.	No	Date

## Section Section

When the **Plus** or **Edit** button is selected from the Section section of the **Link Reserve List to Courses** dialog box, the **Section Number** and **Total Students** fields are available in the **Dept/Inst/Course/Section** dialog box (see [Figure 8-62](#)).

---



---

**Figure 8-62. Dept/Inst/Course/Section Dialog Box - Section**

[Table 8-10](#) describes the section fields.

**Table 8-10. Dept/Inst/Course/Section dialog box-Section Information**

Name	Description	Required	Range
Section No.	Section number of the course to which the reserve list is linked.	Yes	Alphanumeric, punctuation, and spaces Uppercase and lowercase allowed 10 characters
Total Students	Total number of students in the section.	Yes	Numeric 0-99999



**IMPORTANT:**

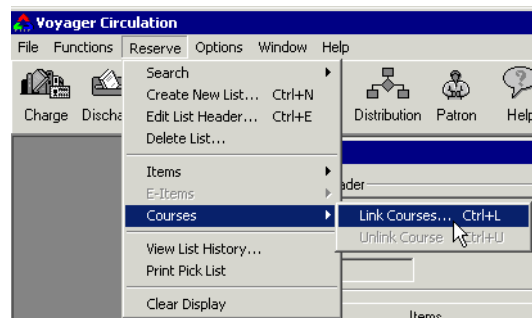
*A reserve list must be linked to at least one category for the reserve list to be active and searchable in WebVoyage.*



**Procedure 8-23. Linking Courses to the Course Reserve List**

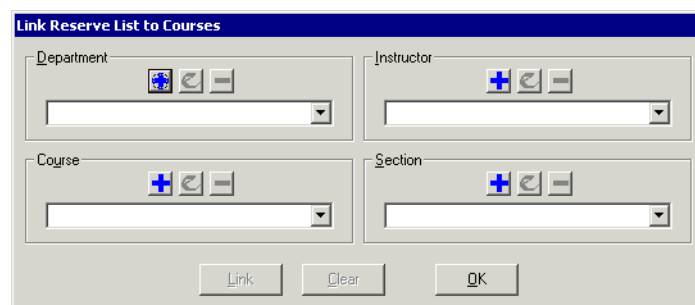
Use the following to link a course to the course reserve list:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select **Courses> Link Courses** from the **Reserve** menu or right-click and select the same command from the submenu (see [Figure 8-63](#)).



**Figure 8-63. Selecting Link Courses**

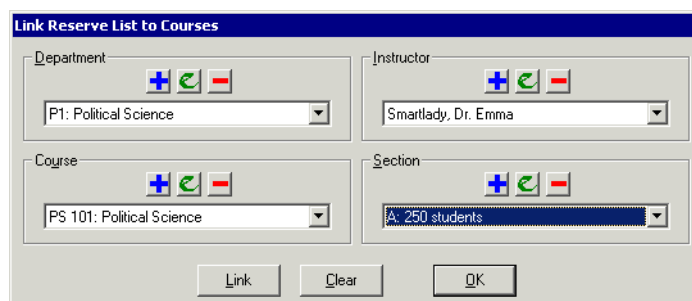
Result: The **Link Reserve List to Courses** dialog box opens (see [Figure 8-64](#)).



**Figure 8-64. Link Reserve List to Courses Dialog Box**

The dialog box includes sections for **Department**, **Course**, **Instructor**, and **Section** information.

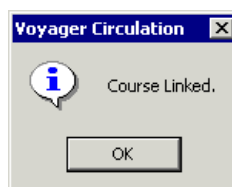
3. Make a selection from one or more of the drop-down lists (see [Figure 8-65](#)).



**Figure 8-65. Example of a Completed Link Reserve List to Courses Dialog Box**

4. Click the **Link** button to link the information to the reserve list. Otherwise, click **Clear** to clear your selections.

Result: A message stating the course has been linked displays (see [Figure 8-66](#)).



**Figure 8-66. Course Linked Message**

In addition, the **Linked Courses** section of the **Reserve** workspace updates to include this information (see [Figure 8-67](#)).

The 'Reserve' dialog box contains the following fields and tables:

**Reserve List Header**

List Name:  Effective:  -   
Location:  Item Type:   
Item Count:  E-item Count:

Items		E-Items			
Title	Author	Barcode	Call Number	Location	Item Type
Modern government: a survey of political science [by] Dell Gillette Hitchner [and] William Henry Harbold.	Hitchner, Dell Gillette.	55656	JA66 .H5	Main	Book
Study of politics: the Western tradition and American origins.	Hacker, Andrew.	76476	JK274 .H12	Main	Book

**Linked Courses:**

Department	Instructor	Course	Section
P1: Political Science	Smartlady, Dr. Emma	PS 101: Political Science	A (250 students)

Figure 8-67. Updated Reserve Workspace

**NOTE:**

After completing the sections of the **Link Reserve List to Courses** dialog box, if the **OK** button is clicked, a message displays alerting the operator that the course has not been linked and asking the operator to either link it or clear the course information (see [Figure 8-68](#)).

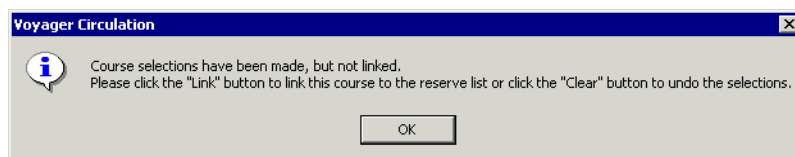


Figure 8-68. Message when Selecting the OK Button

**Adding Course Information**

Operators may add course information which populates the department, instructor, course, and section drop-down menus in the **Link Reserve List to Courses** dialog box.

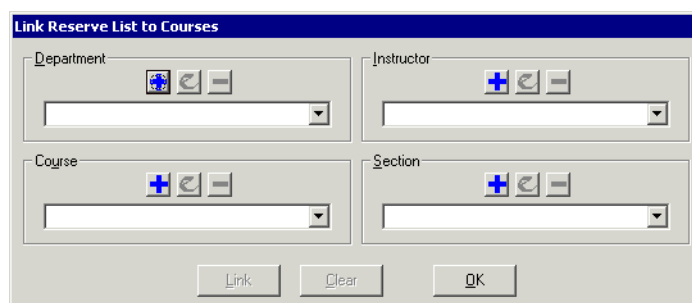


### Procedure 8-24. Adding a Department, Instructor, Course, or Section

Use the following to add departments, instructors, courses, or sections to the drop-down menus in the **Link Reserve List to Courses** dialog box:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page 8-14.
2. Select **Courses> Link Courses** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The **Link Reserve List to Courses** dialog box opens (see [Figure 8-69](#)).

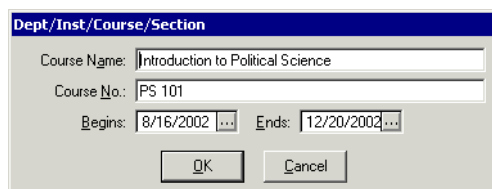


**Figure 8-69. Link Reserve List to Courses Dialog Box**

3. Click the **Plus** button in the appropriate section, Department, Instructor, Course, and/or Section.

Result: The **Dept/Inst/Course/Section** dialog box opens.

4. Enter the following fields:
  - a. To add Department information, enter the Department Name in the **Dept. Name** field and the Department Code in the **Dept. Code** field (see [Figure 8-70](#)). Click **OK** to save and exit. Click **Cancel** to close the dialog box without saving your changes.

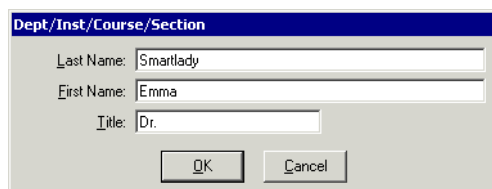


The screenshot shows a dialog box titled "Dept/Inst/Course/Section". It has four input fields: "Course Name:" with the text "Introduction to Political Science", "Course No.:" with the text "PS 101", "Begins:" with a date picker showing "8/16/2002", and "Ends:" with a date picker showing "12/20/2002". At the bottom are "OK" and "Cancel" buttons.

---

**Figure 8-70. Dept/Inst/Course/Section Dialog Box - Department**

- b. To add Instructor information, enter the Last Name, First Name, and Title of the instructor in the **Last Name**, **First Name**, and **Title** fields (see [Figure 8-71](#)). Click **OK** to save and exit. Click **Cancel** to close the dialog box without saving your changes.
- 

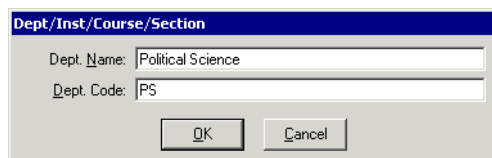


The screenshot shows the same dialog box, but with the "Instructor" tab selected. It has three input fields: "Last Name:" with the text "Smartlady", "First Name:" with the text "Emma", and "Title:" with the text "Dr.". At the bottom are "OK" and "Cancel" buttons.

---

**Figure 8-71. Dept/Inst/Course/Section Dialog Box - Instructor**

- c. To add Course information, enter the Course Name, Course number, the date the course begins, and the date the course ends in the **Course Name**, **Course No.**, **Begins**, and **Ends** fields respectively (see [Figure 8-72](#)). Click **OK** to save and exit. Click **Cancel** to close the dialog box without saving your changes.
- 



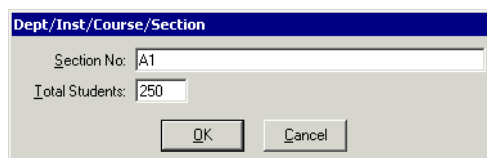
The screenshot shows the same dialog box, but with the "Course" tab selected. It has two input fields: "Dept. Name:" with the text "Political Science" and "Dept. Code:" with the text "PS". At the bottom are "OK" and "Cancel" buttons.

---

**Figure 8-72. Dept/Inst/Course/Section Dialog Box - Course**



- d. To add Section information, enter the Section number, and the total number of students in the **Section No.** and **Total Students** fields (see [Figure 8-73](#)). Click **OK** to save and exit; click **Cancel** to close the dialog box without saving your changes.



**Figure 8-73. Dept/Inst/Course/Section Dialog Box - Section**

Result: The **Department, Instructor, Course** and/or **Section** information is added.

## Editing Course Information

Operators may edit **Department, Instructor, Course**, or **Section** information.

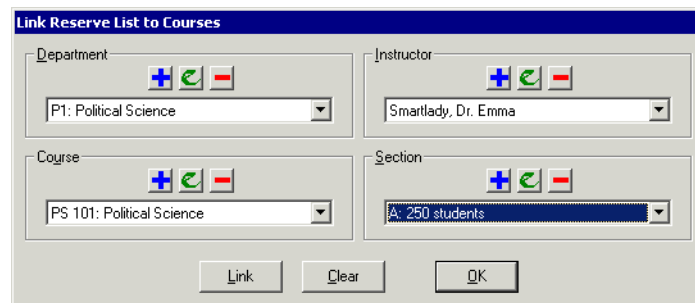


## Procedure 8-25. Editing Course Information

Use the following to edit course information:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page 8-14.
2. Select **Courses> Link Courses** from the **Reserve** menu (or right-click and select the same command from the submenu).

Result: The **Link Reserve List to Courses** dialog box opens (see [Figure 8-74](#)).



**Figure 8-74. Link Reserve List to Courses Dialog Box**

3. Select a department, instructor, course, or section from the appropriate drop-down list.
4. Click the **edit** button (displays as an **e**).

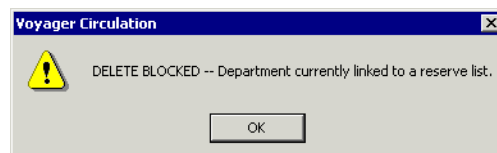
Result: The corresponding **Dept/Inst/Course/Section** dialog box opens.

5. Edit the information in the fields.
6. Click **OK** to save your changes and exit. Otherwise, click **Cancel** to close the dialog box without saving your changes.

Result: The information is edited.

## Deleting Course Information

Operators may delete course information providing the course is not currently linked to a reserve list. If it is linked a block message displays (see [Figure 8-75](#)).



**Figure 8-75. Delete Blocked**



### Procedure 8-26. Deleting Course Information

Use the following to delete **Department**, **Instructor**, **Course**, or **Section** information:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page 8-14.
2. Select **Courses> Link Courses** from the **Reserve** menu (or right-click and select the same command from the submenu).

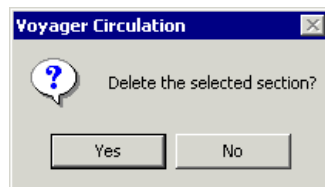
Result: The **Link Reserve List to Courses** dialog box opens (see [Figure 8-76](#)).

The screenshot shows a dialog box titled "Link Reserve List to Courses". It contains four groups of controls, each with a plus (+), minus (-), and refresh (circular arrow) button. The "Department" group shows "P1: Political Science". The "Instructor" group shows "Smartlady, Dr. Emma". The "Course" group shows "PS 101: Political Science". The "Section" group shows "A: 250 students". At the bottom of the dialog are three buttons: "Link", "Clear", and "OK".

**Figure 8-76. Link Reserve List to Courses Dialog Box**

3. Select a department, instructor, course, or section from the appropriate drop-down list. In this example the A: 250 students Section is being deleted.
4. Click the **minus** sign button.

Result: A message displays asking you to confirm the delete (see [Figure 8-77](#)).



---

**Figure 8-77. Message Confirming the Deletion of the Section Course Information**

5. Click **Yes** to delete the information. Otherwise, click **No** if you do not want to proceed with the delete.

Result: The section is deleted.

---

## Deleting a Reserve List

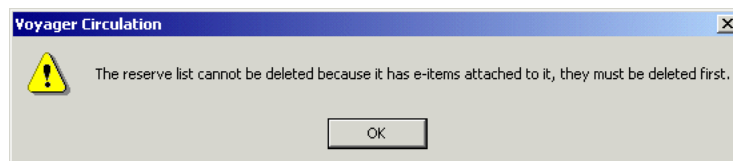
---

Operators can delete reserve lists. The system allows operators to delete current reserve lists, which contain items that have the 'On Reserve' status.

**NOTE:**

A reserve list is blocked ([Figure 8-78](#)) from being deleted if it has any e-items attached to it. The e-items must be deleted before the reserve list can be deleted.

---



---

**Figure 8-78. Cannot Delete Reserve List Block Message**



### Procedure 8-27. Deleting a Reserve List

Use the following to delete a reserve list:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page 8-14.
2. Select **Delete List** from the **Reserve** menu. This command is not available from a right-click submenu.

Result: A message displays asking you to confirm the delete command (see [Figure 8-79](#)).

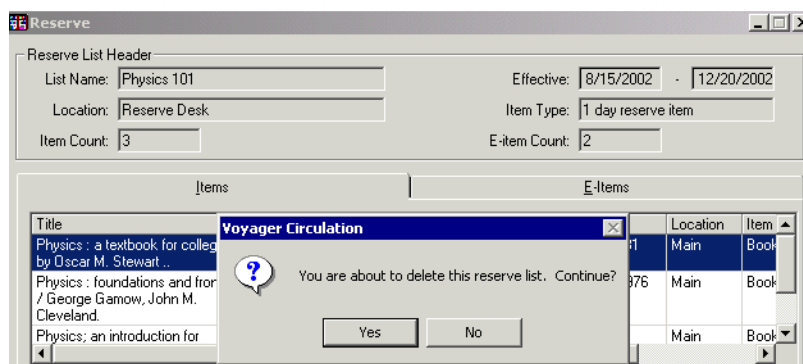


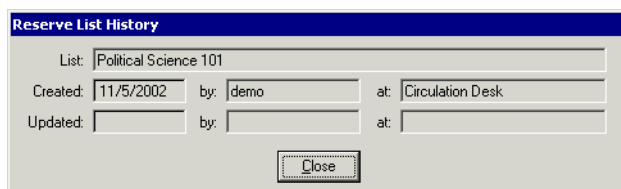
Figure 8-79. Reserve List Delete Confirmation Message

3. Click the **Yes** button to continue with the delete. Otherwise, click **No** to cancel the delete.

Result: All information associated with the reserve list is removed and the list is deleted.

## Viewing Course Reserve History

The **Reserve List History** dialog box ([Figure 8-80](#)) includes the name of the list displays, the person who created the list, the time and place, and the person who updated the reserve list.



---

**Figure 8-80. Reserve List History**

[Table 8-11](#) describes the **View Course Reserve** dialog box.

**Table 8-11. Reserve List History**

Name	Description
List Name	Name of the Reserve list.
Created by/at	Date the Reserve list was created, the operator id and the circulation desk where that operator created the list.
Updated by/at	Date the Reserve list was updated, the operator id and the circulation desk where that operator updated the list.



---

**Procedure 8-28. Viewing Course Reserve List History**

Use the following to view the Reserve List History:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select **View List History** from the **Reserve** menu. This command is not available from a right-click submenu.

Result: The **Reserve List History** dialog box opens (see [Figure 8-81](#)).

**Figure 8-81. Reserve List History**

3. Click the **Close** button to close the **Reserve List History** dialog box.

## Printing a Reserve Pick List

You can print a pick list for items on the **Items** tab of a reserve list.

**NOTE:**

The list prints in the Latin-1 character set.

The pick list typically contains the list name, effective dates, and item information of the items that are on the list.

**NOTE:**

You can customize the format in which you want the reserve pick list to print, changing heading information, font sizes and other details. See [Reserve Pick List Stanza](#) on [page A-37](#) for more information on customizing print templates.



### Procedure 8-29. Printing a Reserve Pick List

Use the following to print a reserve list:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select **Print Pick List** from the **Reserve** menu. This command is not available from a right-click submenu.

Result: The pick list prints from the default printer defined for your computer.



---

### Procedure 8-30. Clearing your Display

---

Use the following to clear the information that displays in the **Reserve** workspace:

1. After logging in to the Circulation module, search for and display a Reserve List. See [Procedure 8-3, Searching for a Course Reserve List](#), on page [8-14](#).
2. Select **Clear Display** from the **Reserve** menu or right-click while pointing at the reserve list header and choose **Clear Display** from the submenu.

Result: The fields on the **Reserve** workspace are blank.

---

## Course Reserve Batch Jobs

---

Administrators can use the following batch jobs to aid in more efficient functioning of Course Reserves:

- Place Items on Active Course Reserve Lists On Reserve, Circjob 34, is a circulation batch job that places items "On Reserve" automatically for items on active reserve lists.
- Place Recalls and Holds for Items on Active Course Reserve Lists, Circjob 35, is a circulation batch job that places administrative holds or recalls on items on active reserve lists.
- Take Items on Inactive Course Reserve lists Off Reserve, Circjob 36, is a circulation batch job that places items "Off Reserve" automatically for items on expired reserve lists.

#### **NOTE:**

Administrators do not have to run these jobs.

See the *Voyager Technical User's Guide* for information about these jobs and how to run them.

---



### Introduction

---

In the Circulation module, a block message displays when a circulation transaction is attempted and a block condition exists. The circulation transaction is stopped until the operators resolves the block condition or overrides it. The operator must have authority to override the block. If not, a supervisor with the authority can log in and override the block.

Patrons can be blocked from circulation transactions due to patron blocks or item blocks. A patron block typically occurs when the limits defined for the patron group to which the patron belongs are met or surpassed. Item blocks typically occur when a circulation transaction is attempted that is not allowed for the particular item type.

For information on defining patron and item blocks, as well as resolution methods and authority to override blocks, see the *Defining Circulation Blocks* chapter in the *Voyager System Administration User's Guide*.

### Purpose of This Chapter

---

This chapter provides:

- Lists of Patron and Item blocks
- Override authority security profile information
- Procedures for operator and supervisor overrides of blocks

## **Patron Blocks**

---

The following is a list of possible patron blocks:

- Patron Expired
- Patron Address Invalid
- Charge Limit (cluster-wide)
- Charge Limit for Items of a Specific Type (cluster-wide)
- Charge Limit for Items (within the Circulation Policy Group)
- Charge Limit for Items of a Specific Type (within the Circulation Policy Group)
- Fine Limit
- Overdue Limit
- Overdue Recall Limit
- Recall Limit
- Claims Returned Limit
- Lost Limit
- Self-shelved Limit
- Short Loan Limit
- Callslip Limit
- Suspension
- Demerits Limit
- UB Charge Limit
- UB Fine Limit
- UB Demerits
- UB Items Borrowed
- UB Overdue Limit
- UB Overdue Recall Limit
- UB Claims Returned Limit
- UB Lost Limit
- UB Self-Shelved Limit
- Max UB Requests

## Item Blocks

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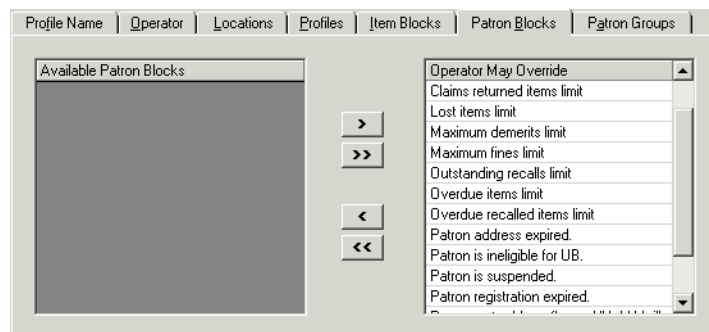
The following is a list of possible item blocks:

- Hold for Other Patron
- Item Scheduled
- Short Loan Scheduled
- Callslip by Others
- Non-circulating Item
- Zero Loan Period
- Term Due Date Not Found
- Out of Phase Term Renewal
- New Due Date Before Current Due Date
- New Due Date in Past
- Damaged Item
- Withdrawn Item
- Foreign Item Location
- Renewal with Hold Request
- Renewal with Recall Request
- Renewal with Overdue Status
- Non-renewable Item
- No Courtesy Discharge
- Item at Renewal Limit

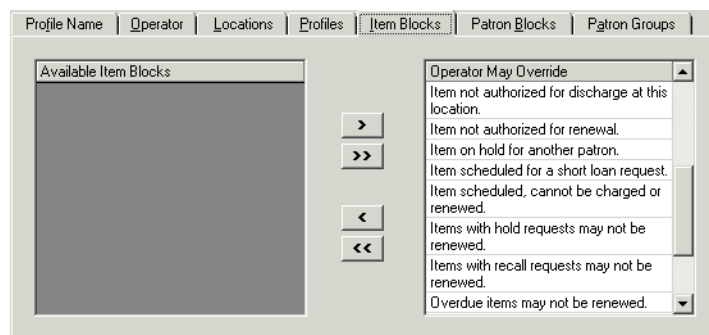
## Security

---

Depending on your security profile, you may be allowed to override blocks. The **Patron Blocks** ([Figure 9-1](#)) and **Item Blocks** ([Figure 9-2](#)) tabs in the **Security - Circulation Profile** workspace in the System Administration module is where the authority to override blocks is granted. Operators have the authority to override any specific block listed in the **Operator may Override** list box on each of the tabs.



**Figure 9-1. Patron Blocks Tab in Circulation - Security Profiles**



**Figure 9-2. Item Blocks Tab in Circulation - Security Profiles**



**IMPORTANT:**

*If operators do not have override authority, the transaction may not continue. In this case to continue the transaction, a Supervisor with authority must log in.*

See the *Item Blocks* and *Patron Blocks* sections in the *Defining Circulation Blocks* chapter in the *Voyager System Administration User's Guide* for more information.

## Block Condition Summary

[Table 9-1](#) summarizes the block conditions, where it is defined, the message received in the circulation module, and how to resolve the block condition.

**Table 9-1. Block Conditions Summary Table**

Block Condition	Where Defined	Block Message in the Circulation Module	Security to Override the Block	Block Resolution
<b>Patron Blocks</b>				
Patron Expired	<b>Expires</b> field on the patron's patron record.  This is a Voyager system-defined automatic block.	Patron registration expired.	Patron Registration Expired.	Edit the expiration date in the <b>Expires</b> field.
Patron Address Invalid	<b>Hold Mail</b> check box on the patron record's <b>Address</b> tab.  This is a Voyager system-defined automatic block.	Permanent address has been flagged 'Hold Mail.'	Permanent address flagged hold mail.	Clear the <b>Hold Mail</b> check box.
Fine Limit	<b>Max Outstanding Balance</b> value on the <b>Circulation Policy Matrix Record Settings</b> dialog box.	Maximum fines limit.	Maximum fines limit.	Post against the fine in the <b>Post Against Fine/Fee</b> dialog box.
Overdue Limit	<b>Max Overdue Items</b> value on the <b>Circulation Policy Matrix Record Settings</b> dialog box.	Overdue items limit.	Overdue items limit.	Discharge overdue items from the <b>Charged Items Index</b> dialog box.

**Table 9-1. Block Conditions Summary Table**

<b>Block Condition</b>	<b>Where Defined</b>	<b>Block Message in the Circulation Module</b>	<b>Security to Override the Block</b>	<b>Block Resolution</b>
Overdue Recall Limit	<b>Max Overdue Recalled Items</b> value on the <b>Circulation Policy Matrix Record Settings</b> dialog box.	Overdue recalled items limit.	Overdue recall items limit.	Discharge items with pending requests.
Recall Limit	<b>Max Number of Recalls</b> value on the <b>Patron Rules</b> dialog box.	Outstanding recalls limit.	Outstanding recalls limit.	Cancel recall requests in the <b>Patron Request Information</b> dialog box.
Claims Returned Limit	<b>Max Claimed Returns</b> value on the <b>Patron Rules</b> dialog box.	Claim returned limit.	Claims returned items limit.	Reduce the Claims Returned counter in the <b>Set Patron Counters</b> dialog box.
Lost Limit	<b>Max Lost Items</b> value on the <b>Patron Rules</b> dialog box.	Lost items limit.	Lost items limit.	Reduce the Lost Items counter in the <b>Set Patron Counters</b> dialog box.
Self-shelved Limit	<b>Max Self-Shelve Returns</b> on the <b>Patron Rules</b> dialog box.	Self-shelved items limit.	Self-shelved items limit.	Reduce the Self-Shelves counter in the <b>Set Patron Counters</b> dialog box.
Short Loan Limit	<b>Short Loan Titles</b> or <b>Per Day</b> values on the <b>Patron Rules</b> dialog box.	Short loan limit.	Short Loan limit.	Cancel short loan requests in the <b>Patron Request Information</b> dialog box.

Table 9-1. Block Conditions Summary Table

Block Condition	Where Defined	Block Message in the Circulation Module	Security to Override the Block	Block Resolution
Callslip Limit	<b>Max Call SLip Requests</b> on the <b>Patron Rules</b> dialog box.	Call Slip limit.	Call Slip limit.	Cancel call slip requests in the <b>Patron Request Information</b> dialog box.
Suspension	Can be manually applied, or system generated.  See the <a href="#">Suspension</a> section in the <i>Voyager Circulation User's Guide</i> .	Patron is suspended until <i>date</i> .	Patron is suspended.	Edit the suspension date in the <b>Suspend Patron</b> dialog box.
Demerits Limit	<b>Max Demerits</b> on the <b>Circulation - Patron Groups</b> workspace.  <b>NOTE:</b> Must have the <b>Use Demerits</b> check box selected, see the appendix, <a href="#">Demerits</a> on <a href="#">page D-1</a> , for more information.	Maximum Demerits limit.	Maximum demerits limit.	Post against the demerits in the <b>Post Against Demerits</b> dialog box.
UB Ineligible	<b>UB Eligible</b> check box on the <b>UB Policy Definitions</b> workspace.		Unable to override this block.  Patron is ineligible for UB is currently inactive.	Select the <b>UB Eligible</b> check box for the patron's patron group.

**Table 9-1. Block Conditions Summary Table**

<b>Block Condition</b>	<b>Where Defined</b>	<b>Block Message in the Circulation Module</b>	<b>Security to Override the Block</b>	<b>Block Resolution</b>
UB Fine Limit	<b>UB Fines/Lost Item Fees</b> value on the <b>UB Policy Definitions</b> workspace.	UB maximum fines limit.	UB maximum fines limit.	Post a payment, or forgive a fine/fee using the <b>Post Against fine/fee</b> dialog box.
UB Demerits Limit	<b>Max Demerits</b> value on the <b>UB Policy Definitions</b> workspace.	UB maximum demerit limit.	UB maximum demerit limit.	Post against the demerits in the <b>Post Against Demerits</b> dialog box.
UB Items Borrowed Limit	<b>Max Item Borrowed</b> value on the <b>UB Policy Definitions</b> workspace.	UB maximum items borrowed limit.	UB charged items limit.	Discharge some charged items.
UB Overdue Limit	<b>Max Overdue Items</b> value on the <b>UB Policy Definitions</b> workspace.	UB maximum overdue items limit.	UB overdue items limit.	Discharge some overdue UB items.
UB Overdue Recall Limit	<b>Max Overdue Recalled Items</b> value on the <b>UB Policy Definitions</b> workspace.	UB maximum overdue recall items limit.	UB overdue recall items limit.	Discharge UB items with pending recalls.
UB Self-shelved Limit	<b>Max Self-Shelf returns</b> value on the <b>UB Policy Definitions</b> workspace.	UB maximum self-shelved items limit.	UB self-shelved items limit.	Reduce the UB Self-Shelves counter in the <b>Set Patron Counters</b> dialog box.



**Table 9-1. Block Conditions Summary Table**

<b>Block Condition</b>	<b>Where Defined</b>	<b>Block Message in the Circulation Module</b>	<b>Security to Override the Block</b>	<b>Block Resolution</b>
UB Claims Returned Limit	<b>Max Claimed Returns</b> value on the <b>UB Policy Definitions</b> workspace.	UB maximum claims returned items limit.	UB claims returned items limit.	Reduce the UB Claims Returned counter in the <b>Set Patron Counters</b> dialog box.
UB Lost Limit	<b>Max Lost Items</b> value on the <b>UB Policy Definitions</b> workspace.	UB maximum lost items limit.	UB lost items limit.	Reduce the UB Lost Items counter in the <b>Set Patron Counters</b> dialog box.
<b>Item Blocks</b>				
Charge limit (cluster-wide)	<b>Charged items limit for all item types</b> field on the <b>Global Borrowed Item Limits</b> tab, for the patron group.	Patron charged item limit reached.	Charge Items limit.	Discharge items.
Charge limit for specific item types (cluster-wide)	Item Type and Limit cell on the <b>Global Borrowed Item Limits</b> tab, for the patron group.	Item's item type limit reached.	Charged Items Limit for Item's Item Type.	Discharge some items of the specific type.
Charge limit for items (within a Circulation Policy Group)	<b>Max Items Borrowed in this Policy Group</b> field on the <b>Patron Rules</b> dialog box.	Item's policy group limit reached.	Charged Items Limit for Item's Policy Group.	Discharge items.

**Table 9-1. Block Conditions Summary Table**

<b>Block Condition</b>	<b>Where Defined</b>	<b>Block Message in the Circulation Module</b>	<b>Security to Override the Block</b>	<b>Block Resolution</b>
Charge limit for Items of a specific item type (within the Circulation Policy Group)	<b>Max Items Borrowed for this Policy Group &amp; Item Type</b> field <b>Circulation Policy Matrix Record Settings</b> dialog box.	Patron group limit reached for the item type.	Charged Items Limit for Policy Group for item's item type.	Discharge items of that type belonging to that Circulation Policy Group.
Hold for Other Patron  <b>NOTE:</b> Informational message, not block.	Automatic system defined check.	Item has an outstanding hold or recall request.	<b>NOTE:</b> Informational message only, but item is on hold for another patron in the overrides list.	Click <b>OK</b> to continue the transaction.  Cancel the request using the <b>Request Maintenance</b> dialog box.
Item Scheduled  <b>NOTE:</b> For Media items.	Automatic system defined check.		Item scheduled, cannot be charged or renewed.	
Item scheduled for a Short Loan request	Automatic system defined check.	Item is scheduled for a short loan request.	Item scheduled for a short loan request.	Cancel the short loan request in the <b>Request Maintenance</b> dialog box.
Callslip by Others	Automatic system defined check.	There is a call slip placed by other patron on this item.	Item has call slip request for another patron.	Cancel the call slip request in the <b>Request Maintenance</b> dialog box.

**Table 9-1. Block Conditions Summary Table**

<b>Block Condition</b>	<b>Where Defined</b>	<b>Block Message in the Circulation Module</b>	<b>Security to Override the Block</b>	<b>Block Resolution</b>
Non-Circulating Item	<b>Charge/Renew</b> check box on the <b>Circulation Policy Matrix Record Settings</b> dialog box.	Item does not circulate.	Item does not circulate.	Select the <b>Charge/Renew</b> check box to allow circulation.
Zero Loan Period	<b>Loan Period</b> field value is zero (0) on the <b>Circulation Policy Matrix Record Settings</b> dialog box for the specific patron group and item type combination.	Item has a loan period of 0.	Item has a loan period of 0.	Enter a number greater than zero to provide a loan period.
Term Due Date Not Found	<b>End of Term</b> column on the <b>Term Loans</b> tab.	Item has a loan period of TERM, but an end-of-term date has not been found in the current calendar.	End-of-term date not found for TERM loan.	Add an end-of-term date to the current calendar using the <b>Circulation Calendar Term Settings</b> dialog box.
Out of Phase term renewal	<b>End of Term</b> column and the <b>Lead Days</b> column on the <b>Term Loans</b> tab.	Item has a loan period of TERM and is being renewed before the permitted renewal period.	TERM renewal precedes permitted renewal period.	Increase the of lead days.

**Table 9-1. Block Conditions Summary Table**

<b>Block Condition</b>	<b>Where Defined</b>	<b>Block Message in the Circulation Module</b>	<b>Security to Override the Block</b>	<b>Block Resolution</b>
New Due date before current due date	<b>Circulation Policy Matrix Record Settings</b> dialog box's <b>Renewal period</b> and selected the <b>Renew From</b> radio button.	The renewal due date calculated precedes the item's current due date.	Renewal due date precedes current due date.	Increase the renewal period value.
New Due date in past	<b>Circulation Policy Matrix Record Settings</b> dialog box's <b>Renewal period</b> and selected the <b>Renew From</b> radio button.	Renewal due date in past.	Renewal due date in past.	Enter an a future due date.
Damaged Item	This is a Voyager system-defined automatic block based on the Item Status.	Item is damaged.	Damaged Item	Remove this item status in the <b>Item Status</b> dialog box.
Withdrawn Item	This is a Voyager system-defined automatic block based on the Item Status.	Item has been withdrawn.	Withdrawn Item	Remove this item status in the <b>Item Status</b> dialog box.
Foreign Item Location	Item's circulation policy group's <b>Locations Settings</b> dialog box.	This item is not authorized to circulate from this location.	Item not allowed to circulate from this location.	Log into a circulation desk within the item's policy group.

**Table 9-1. Block Conditions Summary Table**

<b>Block Condition</b>	<b>Where Defined</b>	<b>Block Message in the Circulation Module</b>	<b>Security to Override the Block</b>	<b>Block Resolution</b>
Renewal with Hold request	<b>Renew if Hold</b> check box on the <b>Circulation - Policy Definitions</b> workspace's <b>Policies</b> tab.	Items with hold requests may not be renewed.	Items with hold requests may not be renewed.	Select the <b>Renew If Hold</b> check box.
Renewal with Recall Request	<b>Renew if Recall</b> check box on the <b>Circulation - Policy Definitions</b> workspace's <b>Policies</b> tab.	Items with recall requests may not be renewed.	Items with recall requests may not be renewed.	Select the <b>Renew If Recall</b> check box.
Renewal with Overdue status	<b>Renew if Overdue</b> check box on the <b>Circulation - Policy Definitions</b> workspace's <b>Policies</b> tab.	Overdue items may not be renewed.	Overdue items may not be renewed.	Select the <b>Renew If Overdue</b> check box.
Non-Renewable Item	<b>Charge/Renew</b> check box and the <b>Renewal Period</b> on the <b>Circulation Policy Matrix Record Settings</b> dialog box.	This item not authorized for renewal.	Item not authorized for renewal	Enter a number greater than zero for the renewal period.

**Table 9-1. Block Conditions Summary Table**

Block Condition	Where Defined	Block Message in the Circulation Module	Security to Override the Block	Block Resolution
No Courtesy Discharge  <b>NOTE:</b> This can be either a block or an informational message.	<b>Courtesy Discharge</b> check box on the <b>Settings</b> tab.	This item not authorized for discharge at this location.  <b>NOTE:</b> The informational message reads: Item belongs to a foreign circ policy group's location : <i>location name</i> .	Item not authorized for discharge at this location.	Select the <b>Courtesy Discharge</b> check box on the happening locations in the item's circulation policy group.
Item at renewal limit	<b>Max # of Sequential Renewals</b> value on the <b>Circulation Policy Matrix Record Settings</b> dialog box.	Renew limit reached.		Increase the <b>Max # of Sequential Renewals</b> value.

## **Overriding Blocks**

---

Operators with the proper authority may override blocks of circulation transactions. When they do this, a circulation exception is logged in the CIRC\_TRANS\_EXCEPT\_TYPE table, see the table, *Exception Types and Descriptions* in the *System Administration User's Guide* for more information.

These exceptions can be reported by running Circulation batch job, Circjob 24, Transaction Exceptions, see the *Voyager Reporter User's Guide* for more information.

## Patron Blocks

A patron block message appears after entering into the system the patron's barcode (or after having selected a patron after completing a search). Typically, these occur when a charge or request transaction is attempted.

The **Patron Blocked** dialog box ([Figure 9-3](#)) allows the operator to view the patron block information, as well as, override the block. The dialog box displays the reason for the block, the current number of blocks, and the patron group's block limit.

### Override of Patron Blocks

This section describes the procedure for an operator to override patron blocks.



#### Procedure 9-1. Overriding a Patron Block

Use the following to override a patron block that occurs while charging an item:

1. When the block message displays, click the **Override** button (see [Figure 9-3](#)).

Blocked due to...	Current	Group Limit
Maximum fines limit	125.00	100.00

Figure 9-3. Patron Blocked Message - Max Fines Limit

Result: The block is ignored and the patron is given temporary permission to charge items.

**OPTIONAL:**

2. *Optionally, you may select **Cancel**.*

Result: This causes the patron to be blocked from charging items.

---

## **Supervisor Override of Patron Blocks**

---

Operators who do not have the proper authority to override patron blocks may have a Supervisor (someone with the override authority) log in and override the block, allowing the transaction to continue. In this case if a block condition exists, an active **Supervisor** button displays in the **Patron Blocked** dialog box, instead of the **Override** button.



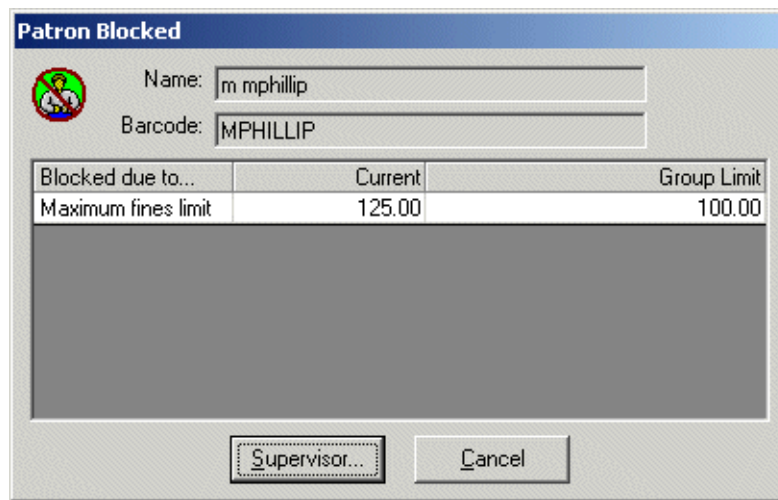
### **Procedure 9-2. Supervisor Override of a Patron Block**

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Use the following to override a patron block in the Circulation module with a Supervisor log in:

1. If the **Supervisor** button appears active in the block message, click the **Supervisor** button (see [Figure 9-4](#)).





**Patron Blocked**

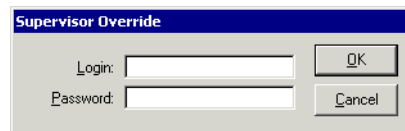
 Name:

Barcode:

Blocked due to...	Current	Group Limit
Maximum fines limit	125.00	100.00

**Figure 9-4. Patron Block with Supervisor Button**

Result: The **Supervisor Override** dialog box opens (see [Figure 9-5](#)).



**Supervisor Override**

Login:

Password:

**Figure 9-5. Supervisor Override Dialog Box**

**NOTE:**

If the operator had selected **Cancel**, the charge cannot continue.

- The person with the authority to override the block then enters their Login and Password in the **Login** and **Password** fields, respectively.

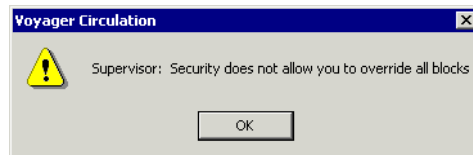
Result: The block is ignored and the transaction continues. In this case, the **Charge** workspace opens with the cursor in the **Barcode** field.

- Enter the item's barcode in the **Barcode** field.

Result: The item is charged after the supervisor overrides the item block that pops up.

**NOTE:**

If the person that logged in to override the block does *not* have the proper authority to override that block, then a message displays indicating that this is the case (see [Figure 9-6](#)).



---

**Figure 9-6. Supervisor Does Not Have the Authority to Override the Block**

When the operator clicks the **OK** button, the **Supervisor Override** dialog box opens again.

---

## Item Blocks

---

An Item block message displays after entering into the system the item's barcode. Typically, these occur when a charge or request transaction is attempted.

The **Item Blocks and Information** dialog box allows the operator to view item block information, as well as, override the block (see [Overriding Item Blocks](#) on [page 9-19](#)).

## Comment Field Alert

---

When patrons makes a request, they have the option to provide a comment with the request as a note to library staff. When there is an outstanding hold request for an item being discharged, the **Item Blocks and Information** dialog box (see [Figure 9-7](#)) displays the patron request comment when the item is being discharged.

**Figure 9-7. Patron Request Comment**

When you request a printout/hold slip, the patron request comment is printed. This is handled by the [HOLD SLIP] CommentLabel= option in the Circ.ini file. See [Hold Slip Stanza](#) on [page A-11](#) for more information.

Similarly, when there is an outstanding call slip request for a charged item, the **Item Blocks and Information** dialog box displays the patron comment entered with the call slip request for the outstanding request when the item is being discharged.

### Overriding Item Blocks

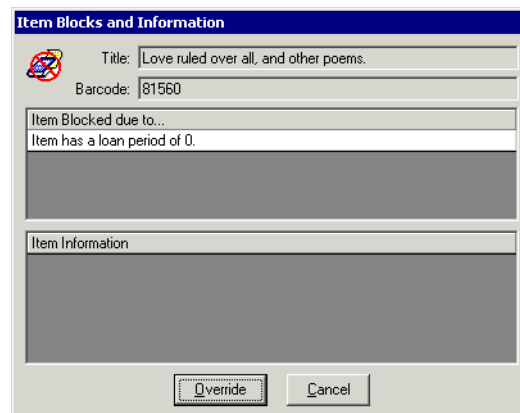
This section describes the procedure for an operator to override item blocks.



#### Procedure 9-3. Overriding Item Blocks

Use the following to override an item block in the Circulation module:

1. Click the **Override** button (as shown in [Figure 9-8](#)).



---

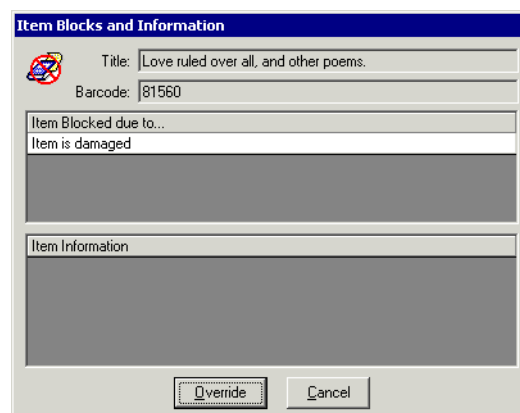
**Figure 9-8. Item Blocked Message - Item Has Loan Period of Zero Block Message in Circulation**

Result: The block is ignored and the item is charged to this patron, after the operator provides a due date.

**NOTE:**

If the operator had selected **Cancel**, the charge cannot continue.

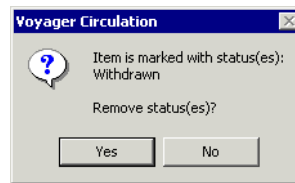
Some blocks arise because the item has an additional status of damaged or withdrawn (see [Figure 9-9](#)).



---

**Figure 9-9. Block Due to the Item Being Damaged**

In this case, when the operator clicks the **Override** button, a message displays asking the operator if he or she wants to remove the status (see [Figure 9-10](#)).



---

**Figure 9-10. Message Asking to Remove the Status**

Clicking **Yes** removes the status and charges the item. Clicking **No** charges the item, but the status is not removed.

---

### **Supervisor Override of Item Blocks**

---

Operators who do not have the proper authority to override item blocks may have a Supervisor (someone with the override authority) log in and override the block, allowing the transaction to continue. In this case, if a block condition exists, an active **Supervisor** button displays instead of the **Override** button in the **Item Block and Information** dialog box.

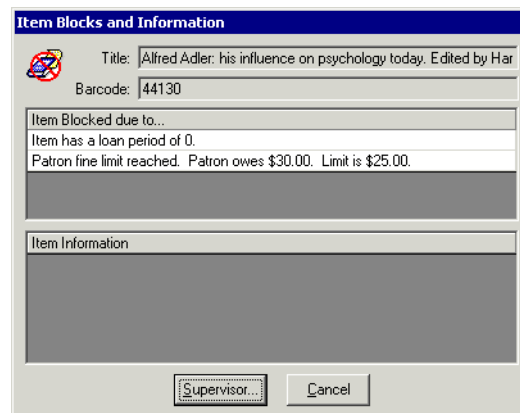


### **Procedure 9-4. Supervisor Override of Item Block**

---

Use the following to override an item block in the Circulation module with a Supervisor log in:

1. If the block message displays with the **Supervisor** button active (as shown in [Figure 9-11](#)), click the **Supervisor** button.

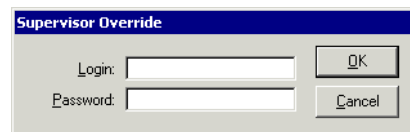


---

**Figure 9-11. Item Block with Supervisor Button**

Result: The **Supervisor Override** dialog box opens (see [Figure 9-12](#)).

---



---

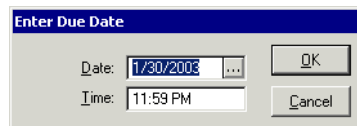
**Figure 9-12. Supervisor Override Dialog Box**

**NOTE:**

If the operator had selected **Cancel**, the transaction cannot continue.

2. The person with the authority to override the block then enters their Login and Password in the **Login** and **Password** fields, respectively.

Result: The block is ignored and the transaction continues. Since this item block is due to a loan period of 0, the **Enter Due Date** dialog box opens (see [Figure 9-13](#)).



**Figure 9-13. Enter Due Date Dialog Box**

3. Enter the due date and click the **OK** button.

Result: The item is charged after the supervisor override.

**NOTE:**

If the person that logged in to override the block does *not* have the proper authority to override the block, a message displays indicating that this is the case.

---





## **Introduction**

---

Short Loans allow your patrons to place a reservation on an item for a specific time period. The item is then picked up and charged out at the scheduled time. It also provides you with tools to manage the reservations so that you can retrieve reserved items in advance and have the items on hand.

## **Purpose of This Chapter**

---

This chapter discusses the following:

- Configuring Short Loans
- Archive Short Loan batch job
- Placing a Short Loan request in the Circulation Module
- Maintaining Short Loan requests
- Viewing Short Loans
- Charging Short Loans

## **Short Loan Configuration**

---

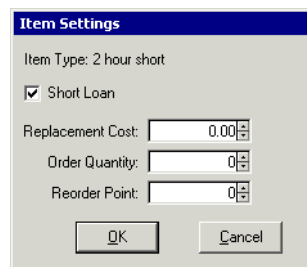
Before placing a short loan request in the Circulation module, short loans need to be configured in the System Administration module.

## Minimum System Administration Configuration

---

The minimum System Administration configuration necessary to use short loans is to have the following set up in the System Administration module **Circulation - Policy Definitions** workspace:

- The **Short Loan** check box on the **Items** tab defines an item as short loanable on the **Items Settings** dialog box (see [Figure 10-1](#)).



---

**Figure 10-1. Items Settings Dialog Box**

- The **Short Loan Matrix** tab defines a circulation matrix for the appropriate patron groups and short loan items (see [Figure 10-2](#)).

**Circulation Policy Matrix Record Settings**

Patron Group: Faculty Item Type: 2 hour short

Short Loan Settings Intervals

☒ Charge/Renew

Loan Period: 2 Hour

Renewal Period: 2 Hour

Max # of Sequential Renewals: 2

Fine Interval: Hour

Fine Rate: 0.50

Max Fine Amount: 5.00

Grace Period: 0 days

Renew From: ☒ Original Due Date ☐ Renewal Date

OK Cancel

**Figure 10-2. Circulation Policy Matrix Record Settings**

See *Add - Circulation Policy Matrix Record Settings (for Short Loans) dialog box - Settings Tab* in the *Voyager System Administration User's Guide* for more information.

This configuration allows short loans within your current circulation policy group.

### Additional System Administration Configuration Considerations

Sites should consider each of the following configurations to determine any additional System Administration configurations they may want to implement, including creating a separate Short Loan Circulation Policy Group.

#### Short Loan Location

Creating a separate short loan physical location is not required.

Create a physical short loan location if your institution plans on having a separate area where short loanable items are to be kept.

Locations are added to the database in the System Administration module using the **Systems - Locations** workspace. See *Locations* in the *Voyager System Administration User's Guide* for more information.

**NOTE:**

If you are going to have a specific location in your library where short loanable items are kept and want to allow your patrons to perform a search for only short loanable items, you may want to create a short loan-related Location Limit Group. A location limit group is a group of locations to which you can limit your search. For more information see *Location Limit Groups* in the *Voyager System Administration User's Guide*.

### **Short Loan Circulation Happening Location**

Creating a separate short loan circulation happening location is not required.

Create a separate short loan circulation happening location if your institution plans on having a separate desk for charging short loans.

If the location where you charge short loans is the same as your regular circulation transactions, you do not need to create a new circulation location. Also, if your short loanable items are to be kept in the main stacks you do not need to create a new stacks location.

Circulation happening locations are created in the System Administration module in the **Circulation - Policy Definitions** workspace, **Locations** tab. See *Circulation Policy Definitions* in the *Voyager System Administration User's Guide* for more information.

### **Short Loan Print Location**

Creating a short loan print location is not required.

Create a short loan print location if your institution is setting up a new short loan circulation location and you want to have a separate print queue for it.

Print locations are created in the System Administration module using the **System - Print Locations** workspace. See *Print Locations* in the *Voyager System Administration User's Guide* for more information.

### **Short Loan Item Type**

Creating a short loan item type is not required.

Create short loan item types if wanted. Item Types are created in the System Administration module in the **System - Item Types** workspace. See *Item Types* in the *Voyager System Administration User's Guide* for more information.

If your institution is going to use the same circulation policy group for short loans and regular charges, you probably want to add a new item type, for example, a Short Loan item type. Also, in your regular circulation policy, select the **Short Loan** check box in the **Item Settings** dialog box in the **System Administration Circulation - Policy Definitions** workspace. This allows you to establish which items are short loanable by assigning those items a temporary item type of Short Loan. This allows you to easily make items short loanable without affecting any of your existing circulation policy settings.

If your institution is going to use the short loan desk for creating item records that require a new item type, you can automatically assign a new item type to newly-created items. This item type should be set up before you create a new policy group in the **System Administration's Circulation - Policy Definitions** workspace.

### Making an Item Short Loanable

Making an item short loanable is required; see [Minimum System Administration Configuration](#) on [page 10-2](#).

This is accomplished in the System Administration module **Circulation - Policy Definitions** workspace, **Items** tab. For every Item Type that should be short loanable, select the **Short Loan** check box on the **Items Settings** dialog box.

See *Items Tab and Item Settings Dialog Box* in the *Voyager System Administration User's Guide* for more information.

### Short Loan Desk Calendar

Creating a specific calendar for short loans is not required.

Establish a separate calendar if your short loan desk has operating hours that are different from the normal library operating hours. This calendar must be associated with a short loans circulation policy.

Calendars are created in **System Administration** module, **Circulation - Calendars** workspace. See *Circulation Calendars* in the *Voyager System Administration User's Guide* for more information.

### Short Loan Circulation Policy

Creating a separate Short Loan Circulation Policy Group is not required.

Create a separate Short Loan Circulation Policy Group if your institution has a separate location for charging short loans. This allows you to establish more easily your short loan policies without conflicting with your existing circulation policies.

### Setting Up a Short Loan Circulation Policy

Setting up a Short Loan Circulation Policy is done in the System Administration module **Circulation - Policy Definitions** workspace. Fill out the tabs as follows:

- On the **Policy Definition** tab provide a name for the short loan policy.
- On the **Locations** tab use the short loan location created in the System Administration module **System - Locations** workspace. Once that location is selected use the **Settings** button to open the **Location Settings** dialog box to define this location as a short loan circulation happening location.
- On the **Policies** tab complete the **Short Loan Early Pickup window** and **Short Loan Unclaimed Interval** fields.

The **Hold Shelf Life** field, **Hold Life** field and **Recall Life** fields do not apply to short loans because holds and recalls cannot be placed on short loanable items.

**Renew if Recall** field and **Renew if Hold** fields also do not apply to short loans because holds and recalls cannot be placed on short loanable items.

- On the **Calendars** tab selected the Short Loan calendar created in the System Administration module **Circulation - Calendars** workspace.
- On the **Patrons** tab select the patron group to select and define the Max Short Loan, Max Short Loan Titles, and Max Short Loan per Day limit values. Also, select the **Place Short Loans Using the OPAC** check box to allow members of this patron group to place short loan requests using WebVoyáge, if wanted. A short loan request may be placed in the Circulation module.

**Courtesy Notices Apply** field. Because sending out courtesy notices for short loaned items by mail would generally be impractical, leaving this check box cleared prevents the system from sending notices to members of the selected patron group.

**Max Items Borrowed Apply** field. When setting this value you should bear in mind that the short loans circulation policy being set up is exclusively for short loan items. The number of regular circulation transactions that a patron may have are not taken into account.

**Max Overdue Recalled Items Apply** field, **Max Number of Recalls Apply** field, **Max Call Slip Requests Apply** field, **Place Holds Inside Library** check box, **Place Recalls Inside Library** check box, **Place Call Slip Requests Inside Library** check box. Because holds, recalls, and call slips cannot be placed on short loanable items, these fields and check boxes are not applicable.

**E-mail Courtesy Notices** check box. If your institution decides to send out short loan courtesy notices, sending the notices by e-mail rather than regular mail might make more sense. Selecting this box gives e-mailing notices priority over sending them by regular mail for the members of the selected patron group.

**E-mail Item Available Notices** check box. An excessive number of Item Available notices may be generated for short loan requests because any time requests are run, if the item is available, a notice is generated for that short loan request. In addition, Item Available notices may be redundant for short loan requests, because of this, you may want to keep this check box cleared.

**E-mail Recall Notices** check box and **E-mail (Other) Recall Notices** check box. Because recalls cannot be placed on short loanable items, these check boxes are not applicable.

- On the **Items** tab select each item that is short loanable, using the **Settings** button to open the **Item Settings** dialog box and select the **Short Loan** check box.
- On the **Short Loan Matrix** tab create a matrix for every patron group-item type on the **Short Loan Settings** tab. Complete the appropriate fields on the **Intervals** tab.

**Courtesy Notice Interval** field and **Minimum Loan for Courtesy** fields. Sending out courtesy notices for short loaned items would generally be impractical. If you choose not to send out courtesy notices, make sure that the **Minimum Loan for Courtesy** field is set to a value higher than your longest short loan period.

See *Circulation Short Loan Policy Matrix* in the *Voyager System Administration User's Guide* for additional information.

### Other Short Loan Related Settings in the System Administration Module

The following fields and settings must be considered when setting up Short Loans, but are not specific to a particular circulation policy.

In the System Administration module **OPAC Configuration - Miscellaneous** workspace, complete the **Set short loan advance booking days displayed** field. This limits how far in advance of the current date a short loan booking can be made, 0-999 days. The range of dates is determined by taking the current date and adding the specified number of additional days into the future.

See *Miscellaneous* in the *Voyager System Administration User's Guide* for more information.

## Short Loan Request Form

The Short Loan form may be customized. The form can be edited on the **Select Form** tab in the **System Administration** module **OPAC Configuration - Request Forms** workspace. The name of the form and the instructions that display on screen may be edited. See *Request Forms* in the *Voyager System Administration User's Guide* for more information.

## Circulation Batch Job 27 - Archive Short Loans

---

In order to use Short Loan functionality, the Archive Short Loans batch job (Circjob 27) must be run. This job updates the status of current requests and archives expired requests in the **Short Loans Search List**. Running the batch job is the only way for these statuses to change.

The Archive Short Loans batch job should be run every 5 to 10 minutes, in order to make sure that requests which have expired are archived and those with a status that has changed get updated. Without this batch job running, the system cannot find out what the current status of the short loan requests.

When the job is run, requests that have expired are archived and those with a status that has changed get updated. There is no order in which these are applied to a request. For example, if a request was last updated while still within the **Early Pickup** window (giving it a status of Short Loan Request), remains uncharged, and by the time the job is next run has gone past the Short Loan Unclaimed Interval, the request is archived. The request is not first given a status of Unclaimed, it is simply archived.



### **TIP:**

*This batch job should be put into a cron so that it runs automatically.*

A cron is a script on your server which is set to run a certain batch job at a specified interval. This script is called a cron in UNIX<sup>®</sup>. Depending on what software your database runs on, your system may perform this task differently. For more information on setting up the Archive Short Loans batch job to run automatically, talk to your server administrator or refer to your UNIX documentation. See the *Voyager Technical User's Guide*, [Circulation Batch Job 27 - Archive Short Loans](#), for additional information on this batch job.



## Placing a Short Loan Request

---

Placing a short loan request is done by searching for an item in the database and placing a reservation. Short loans can be placed through the Circulation or WebVoyage modules.

**IMPORTANT:**

*A short loan may only be made for a specific short-loanable item.*

No specific security is necessary to place short loans.



### Procedure 10-1. Placing a Short Loan Request

---

Use the following to place a short loan request:

1. After logging in to the Circulation module, search for and display the item you want to request. See [Searching for an Item](#) on [page 3-11](#).

Result: The item record displays (see [Figure 10-3](#)).

The screenshot shows a software window titled "Item Record". At the top, there is a "Title" field containing "Health fitness instructor's handbook / Edward T. Howley, B. Don Franks." To the right of the title are several icons: a green checkmark, a red book, a person, a magnifying glass, a bar chart, and a pie chart. Below the title is a table with the following data:

Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
Main	2 hour short	Not Charged			0	22256

Below the table is a tabbed interface with the following tabs: "Bib Brief", "Holdings", "Item/Holdings", "Item Details", and "Item History". The "Bib Brief" tab is selected, showing the following fields:

Author:	Howley, Edward T., 1943-		
Edition:	2nd ed.		
Publisher:	Human Kinetics Books,	Place/Date:	Champaign, Ill. : 1992
Pub. No.:		Series:	
ISSN:		System No.:	ocm23692485
ISBN:	0873223357	LCCN:	91000686
Owning Library:	Training Master DB		

---

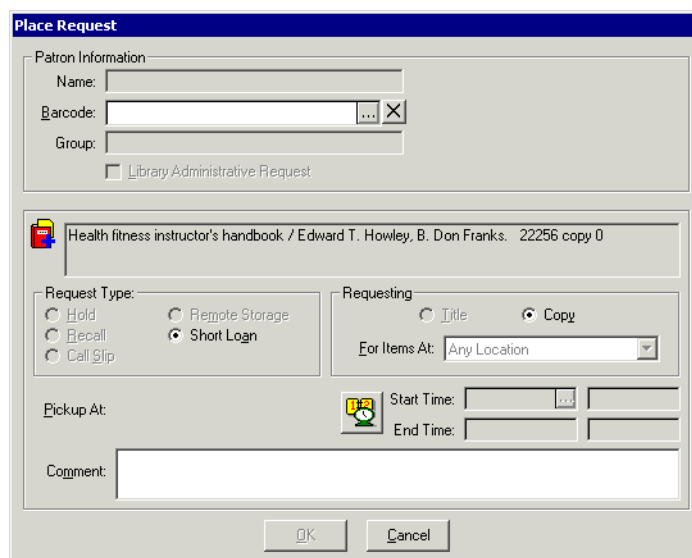
**Figure 10-3. Item Record**

- From the **Item** menu select **Place Request** or click the **Request** button.

Result: The **Place Request** dialog box opens (see [Figure 10-4](#)).

**NOTE:**

MARC information that displays in the **Place Request** dialog box is in the Latin-1 character set.



The "Place Request" dialog box is a standard Windows-style window with a blue title bar. It contains several sections for inputting request details. The "Patron Information" section at the top has fields for Name, Barcode (with a browse button), and Group, along with a checkbox for "Library Administrative Request". Below this is a section for the item being requested, showing a book icon and the title "Health fitness instructor's handbook / Edward T. Howley, B. Don Franks. 22256 copy 0". The "Request Type" section offers radio buttons for Hold, Recall, Call Slip, Remote Storage, and Short Loan (which is selected). The "Requesting" section has radio buttons for Title and Copy (selected), and a dropdown for "For Items At:" set to "Any Location". There are also fields for "Pickup At:", "Start Time:", and "End Time:", each with a browse button. A large "Comment:" text area is at the bottom, and "OK" and "Cancel" buttons are at the very bottom.

**Place Request**


Patron Information

Name:

Barcode:  ... X

Group:

☐ Library Administrative Request

 Health fitness instructor's handbook / Edward T. Howley, B. Don Franks. 22256 copy 0

Request Type:


☐ Hold ☐ Remote Storage ☒ Short Loan

☐ Recall ☐ Call Slip

Requesting:

☐ Title ☒ Copy

For Items At:

Pickup At:  Start Time:  End Time:

Comment:

OK Cancel

**Figure 10-4. Place Request Dialog Box**

3. Enter the barcode of the patron placing the request in the **Barcode** field.

Result: The patron's information displays (see [Figure 10-5](#)).

**Place Request**

Patron Information

Name: Paula Professor

Barcode: 454545

Group: Faculty

☐ Library Administrative Request

1 \$53.50

Health fitness instructor's handbook / Edward T. Howley, B. Don Franks. 22256 copy 0

Request Type:

☐ Hold ☐ Remote Storage ☒ Short Loan

☐ Recall ☐ Call Slip

Requesting

☐ Title ☒ Copy

For Items At: Any Location

Pickup At:

Start Time: End Time:

Comment:

OK Cancel

**Figure 10-5. Barcode of the Patron Placing Short Loan Entered**

**NOTE:**

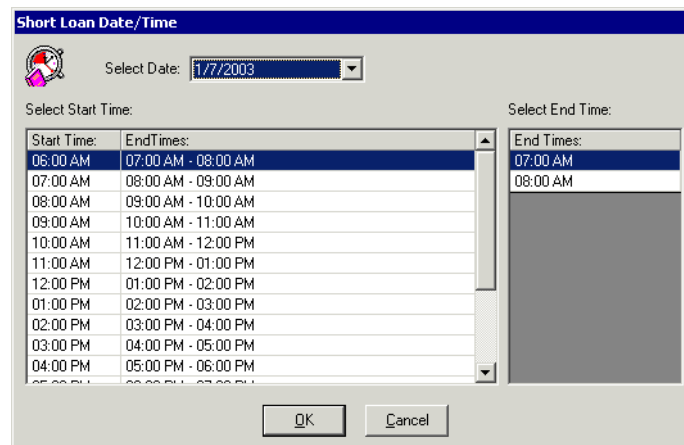
A short loan request may not be made as a Library Administrative Request.

4. The **Short Loan** radio button in the **Request Type** field is automatically selected. Click the **Short Loan** button ([Figure 10-6](#)) to make the reservation.



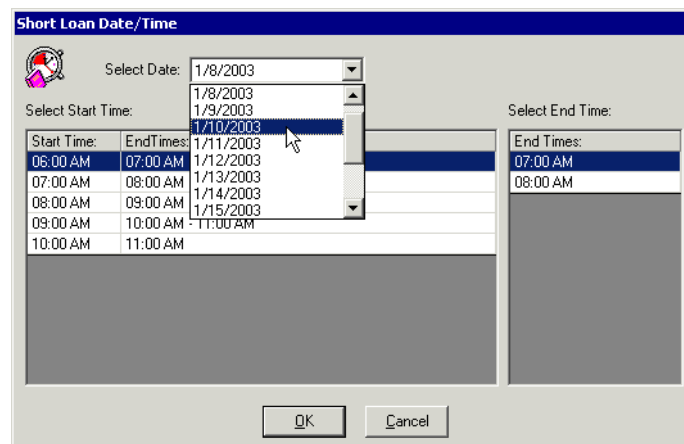
**Figure 10-6. Short Loan Button**

Result: The **Short Loan Date/Time** dialog box opens (see [Figure 10-7](#)).



**Figure 10-7. Short Loan Date/Time Dialog Box**

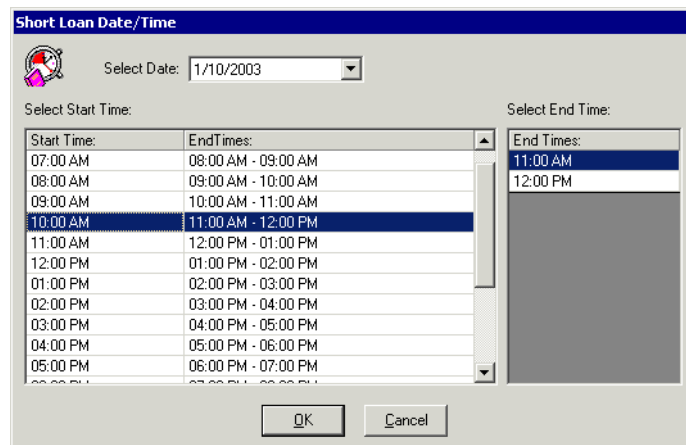
5. In the **Short Loan Date/Time** dialog box, select a date for the request from the drop-down list box in the **Select Date** field (see [Figure 10-8](#)).



**Figure 10-8. Selecting a Date for the Short Loan Request**

Result: This updates the list of available times for that day.

6. Select a start time from the **Select Start Time** column (see [Figure 10-9](#)).



The dialog box titled "Short Loan Date/Time" features a date selector at the top set to "1/10/2003". Below this, there are two main sections: "Select Start Time:" and "Select End Time:". The "Select Start Time:" section contains a table with two columns: "Start Time:" and "EndTimes:". The "Select End Time:" section contains a list box labeled "End Times:". At the bottom are "OK" and "Cancel" buttons.

Start Time:	EndTimes:
07:00 AM	08:00 AM - 09:00 AM
08:00 AM	09:00 AM - 10:00 AM
09:00 AM	10:00 AM - 11:00 AM
10:00 AM	11:00 AM - 12:00 PM
11:00 AM	12:00 PM - 01:00 PM
12:00 PM	01:00 PM - 02:00 PM
01:00 PM	02:00 PM - 03:00 PM
02:00 PM	03:00 PM - 04:00 PM
03:00 PM	04:00 PM - 05:00 PM
04:00 PM	05:00 PM - 06:00 PM
05:00 PM	06:00 PM - 07:00 PM

End Times:  
11:00 AM  
12:00 PM

---

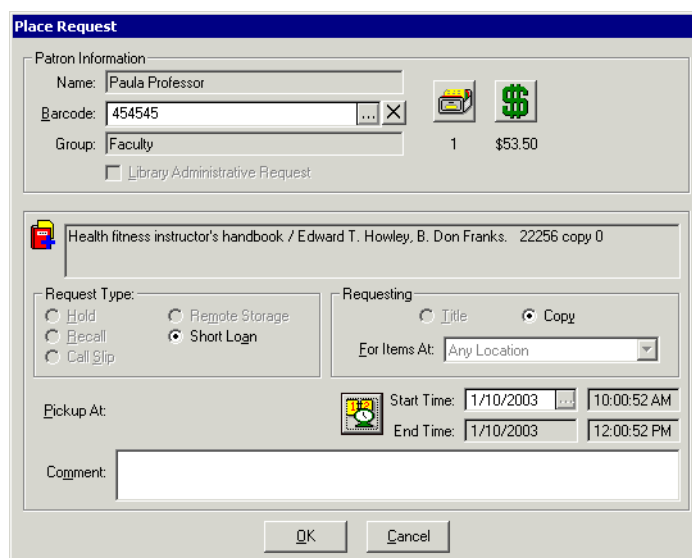
**Figure 10-9. Selecting a Start Time for the Short Loan Request**

**NOTE:**

The available end times change depending on the start time.

7. Select an end time from the **Select End Time** column.
8. Click **OK** to close the **Short Loan Date/Time** dialog box and return to the **Place Request** dialog box. Otherwise, click **Cancel** to close the dialog box without saving changes.

Result: Start and end times are provided for the Short Loan request (see [Figure 10-10](#)).



**Place Request**

Patron Information

Name: Paula Professor

Barcode: 454545

Group: Faculty

☐ Library Administrative Request

1 \$53.50

Health fitness instructor's handbook / Edward T. Howley, B. Don Franks. 22256 copy 0

Request Type:

☐ Hold ☐ Remote Storage ☒ Short Loan

Requesting

☐ Title ☒ Copy

For Items At: Any Location

Pickup At:

Start Time: 1/10/2003 10:00:52 AM

End Time: 1/10/2003 12:00:52 PM

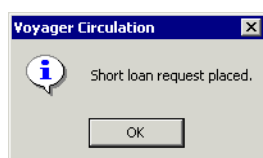
Comment:

OK Cancel

**Figure 10-10. Start and end Times Provided for the Short Loan Request**

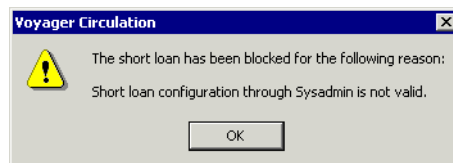
9. Enter any additional information in the **Comment** field if wanted.
10. Click **OK** to place the short loan. Otherwise, click **Cancel** to discard the request.

Result: If the request is successful, a message indicating that displays (see [Figure 10-11](#)).



**Figure 10-11. Short Loan Placed Message**

However, if you click **OK** and the request is not allowed by the system a message indicating that it was not placed displays. An example is shown in [Figure 10-12](#).



---

**Figure 10-12. Short Loan Not Placed Due to Invalid System Administration Configuration**

---

## Short Loan Maintenance

---

Short loans that have been placed on an item can be viewed in the Circulation module. You can view information such as the item's status, the patron that placed the request, and the details of the short loan reservation. You can also cancel a short loan request from this dialog box.

No specific security is necessary to maintain short loans.

Users can maintain short loans from the **Request Maintenance** dialog box for Short Loans (see [Figure 10-13](#)).



**Request Maintenance**

Short stories by present-day authors / ed. by Raymond Woodbury Pence.

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Main		2 hour reserve	Short Loan Request+	0	93501

Patron Name	Pickup Location	Start Time	End Time	Status
Donna Hillcoat	Offsite	09:00 AM 8/22/2002	10:00 AM 8/22/2002	Accepted
Ted Burkhardt	Circulation Desk	05:00 PM 12/19/2002	06:00 PM 12/19/2002	Accepted
Sarah Student	Circulation Desk	12:00 PM 12/20/2002	01:00 PM 12/20/2002	Accepted
Paula Professor	Circulation Desk	04:00 PM 12/20/2002	05:00 PM 12/20/2002	Accepted
Ted Burkhardt	Circulation Desk	09:00 AM 12/23/2002	11:00 AM 12/23/2002	Accepted

Status Date: 8/21/2002

Created: 8/21/2002 by: demo at: Circulation Desk

Updated: by: at:

Note:

Cancel S/L Close

**Figure 10-13. Request Maintenance Dialog Box for Short Loan**

[Table 10-1](#) describes the **Request Maintenance** dialog box for Short Loans.

**Table 10-1. Request Maintenance Dialog Box for Short Loans**

Field	Description
Title	Title of the requested item.
Perm. Location	Item's permanent location.
Temp. Location	Item's temporary location.
Item Type	Item's type, for example, a monograph.
Item Status	Item's circulation status.
Copy	Number of item copies.
Barcode	Item's unique identifier.
Patron Name	Name of the patron placing the short loan.
Pickup Location	Location where the item is to be picked up.
Start Time	Starting time of the period requested.
End Time	Ending time of the period requested.
Status	Status of the request.
Status Date	Date that the last status was applied.

**Table 10-1. Request Maintenance Dialog Box for Short Loans**

Field	Description
Created/by/at	Date that the request was created, the operator that created it and the location where it was created.
Updated/by/at	Date that the request was updated, the operator that updated it and the location where it was updated.
Note	Text entered into the Comment field on the request form.
Cancel S/L button	Cancels the selected request.
Close button	Closes the dialog box.



---

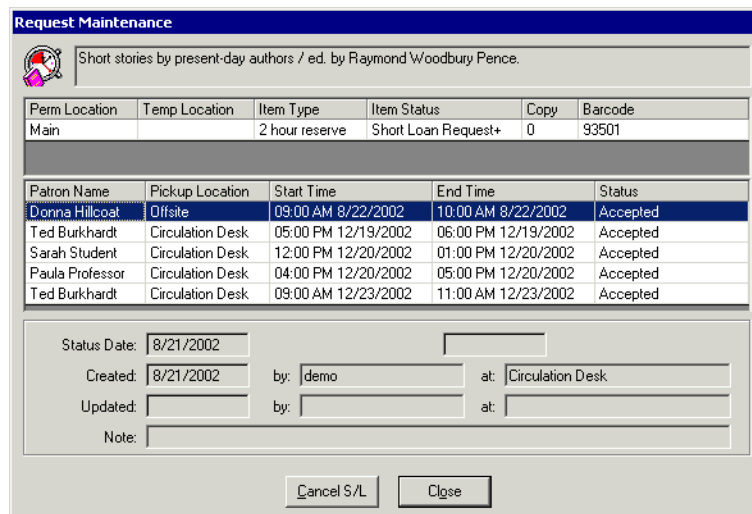
**Procedure 10-2. Canceling a Short Loan**

---

Use the following to cancel a short loan:

1. Search for and display an item record [Searching for an Item](#) on [page 3-11](#).
2. Select **Request Maintenance** from the **Item** menu or click the **Request Maintenance** button.

Result: The **Request Maintenance** dialog box for short loans opens (see [Figure 10-14](#)).



**Request Maintenance**

Short stories by present-day authors / ed. by Raymond Woodbury Pence.

Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Main		2 hour reserve	Short Loan Request+	0	93501

Patron Name	Pickup Location	Start Time	End Time	Status
Donna Hillcoat	Offsite	09:00 AM 8/22/2002	10:00 AM 8/22/2002	Accepted
Ted Burkhardt	Circulation Desk	05:00 PM 12/19/2002	06:00 PM 12/19/2002	Accepted
Sarah Student	Circulation Desk	12:00 PM 12/20/2002	01:00 PM 12/20/2002	Accepted
Paula Professor	Circulation Desk	04:00 PM 12/20/2002	05:00 PM 12/20/2002	Accepted
Ted Burkhardt	Circulation Desk	09:00 AM 12/23/2002	11:00 AM 12/23/2002	Accepted

Status Date: 8/21/2002

Created: 8/21/2002 by: demo at: Circulation Desk

Updated: by: at:

Note:

**Figure 10-14. Request Maintenance Dialog Box for Short Loans**

3. Select the request you want to cancel and click the **Cancel S/L** button.

**NOTE:**

If there are multiple requests placed by a patron, the Cancel all requests placed by this patron for this title? If NO, only the request for this specific item is cancelled message displays.

Click **Yes** to cancel all of the patron's requests. Click **No** to cancel only the current request. Click **Cancel** to discard the cancel in progress.

Result: The short loan is canceled if wanted.

4. Click **Close** to close the **Request Maintenance** dialog box for short loans.

## Viewing Short Loans - The Short Loan Search List

The **Short Loan Search List** dialog box shows items needed for upcoming short loan reservations. The list can be printed and used to collect the items before the reservation time.

**NOTE:**

MARC information that displays in the **Short Loan Search List** dialog box displays in the Latin-1 character set.

---

Patron Name	Patron Barcode	Title	Call Number	Enum/Chron	Item Location	Item
Sarah Student	BARCODE2	Short stories by present-day authors / ed. by Raymond Woodbury Pence.	PZ1.P372 Sh	/ / 0	Main	Shc
Paula Professor	454545	Short stories by present-day authors / ed. by Raymond Woodbury Pence.	PZ1.P372 Sh	/ / 0	Main	Shc

---

**Figure 10-15. Short Loan Search List**

**IMPORTANT:**

*The location that the Circulation operator has logged in to has an effect on which short loan requests display. The pickup location selected by the patron on the short loan request must match the login location of the Circulation operator to allow viewing and canceling that request. This allows each pickup location to view only the short loan requests that are pertinent to that location.*

*For requests submitted through WebVoyage, this location is the location specified in the **OPAC Circ Desk** field in the System Administration module's **Circulation - Cluster Maintenance** workspace. See *Cluster Maintenance in the Voyager System Administration User's Guide* for more information.*

[Table 10-2](#) describes the information that displays in the **Short Loan Search List** dialog box.

**Table 10-2. Short Loan Search List**

Field	Description
Pickup Location	Circulation desk that the operator is logged into.
Search	Search for <ul style="list-style-type: none"> <li>• <b>All</b> short loans</li> <li>• <b>Active Short Loans</b></li> <li>• <b>Problems</b></li> <li>• <b>Unclaimed</b> short loans.</li> </ul>
Date and Time section: From and To fields	Date and time range within which the operator searches for short loan requests.
Patron Name	Name of the patron who placed the short loan.
Patron Barcode	Barcode of the patron who placed the short loan.
Title	Item's title.
Call Number	Item's call number.
Enum/Chron	Item's enumeration and chronology.
Item Location	Item's location.
Item Status	Item's status.
Short Loan Status	Status of the short loan.
Start and End Times	Starting and ending times of the short loan request.
Refresh button	Refreshes the Short Loan Search List taking into account the search and date/time information provided.
Cancel Request button	Cancels the selected request.
Print button	Prints the list.
Close button	Closes the dialog box.

**NOTE:**

If a short loan request has not been picked up and charged out by the time the booking is scheduled to start, it is given a status of **Unclaimed**. This status remains in effect until the end of the **Short Loan Unclaimed Interval**, after which point the booking is archived and removed from the Short Loan Search List.

For information on the Unclaimed Interval, see *Policies Tab* in the *Voyager System Administration User's Guide*.



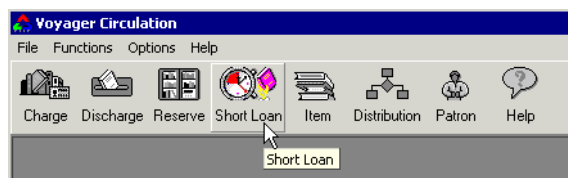
---

### Procedure 10-3. Searching for and Viewing a List of Short Loan Items

---

Use the following to search for and view a list of Short Loan items:

1. After logging in to the Circulation module, select **Short Loan (Ctrl + s)** from the **Functions** menu or click the **Short Loan** button on the Circulation toolbar (see [Figure 10-16](#)).

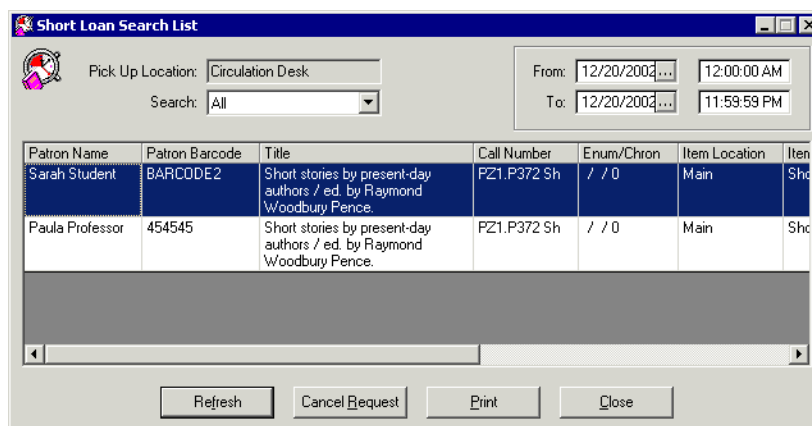


---

**Figure 10-16. Short Loan Button in Circulation Toolbar**

Result: The **Short Loan Search List** dialog box opens (see [Figure 10-17](#)).

---



---

**Figure 10-17. Short Loan Search List Dialog Box**

2. In the Date and Time section, enter the earliest time for which you want to view items in the **From** date and time fields.
3. Enter the latest time and date for which you want to view items in the **To** date and time fields.
4. In the **Search** drop-down list box, set the type of information you want to retrieve by clicking the drop-down arrow and selecting a type from the list.
5. Click the **Refresh** button.

Result: Depending on your selection in the **Search** field, a list of items that match that type and are reserved during the specified time displays in the Search Results block.

---



---

#### Procedure 10-4. Canceling a Short Loan Request

---

Use the following to cancel a Short Loan request:

1. Access the **Short Loan Search List** dialog box. See [Procedure 10-3, Searching for and Viewing a List of Short Loan Items](#), on page 10-22.
2. Select the request to be canceled from the list of search results and click the **Cancel Request** button.

Result: The Short Loan request is canceled and removed from the list.

---



---

#### Procedure 10-5. Printing a List of Short Loan Requests

---

Use the following to print a list of Short Loan requests:

1. Access the **Short Loan Search List** dialog box. See [Procedure 10-3, Searching for and Viewing a List of Short Loan Items](#), on page 10-22.
2. To print the current list of short loan requests, click the **Print** button.

Result: All of the requests that currently display in the list are printed.

---

## Charging a Short Loan

---

Charging short loan items works much the same as charging items in regular fashion.

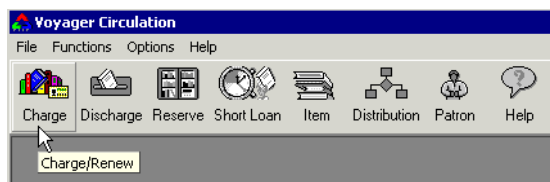


### Procedure 10-6. Charging a Short Loan

---

Use the following to charge a short loan item:

1. After logging in to the Circulation module, click the **Charge** button ([Figure 10-18](#)) from the Circulation toolbar or select **Charge/Renew** from the **Functions** menu.



---

**Figure 10-18. Charge Button**

Result: The **Charge** workspace opens.

2. Enter or scan the patron's barcode into the **Barcode** field and press **Enter**.

Result: The patron's information displays.

3. Enter or scan the item barcode into the **Item Barcode** field and press **Enter**.

#### **NOTE:**

When a short loanable item is charged out, the system checks to see whether there are any bookings made for that item.

There are four possible results.

1. If the patron made a short loan request for the item and the time of charge is between the beginning of the **Short Loan Early Pickup Window** and the end of the **Short Loan Unclaimed Interval** of the reservation, the item is charged.



Upon being charged, it is associated with the reservation and the due date is the time and date of the end of the request period on the short loan request. Also, the short loan request is archived with the dates and times of the reservation preserved.

2. If the patron made a short loan request for the item and the time of charge is before the beginning of the **Short Loan Early Pickup Window**, the **Item Blocks and Information** dialog box opens to indicate that the charge cannot take place.

If the **Override** button is pressed, the item is charged.

Upon being charged, the item is given a new end time for the booking. The system assigns the new end time according to the loan period defined on the **Short Loan Matrix** tab, in the **Circulation - Policy Definitions** workspace, in the System Administration module.

If there are no other bookings for this item that fall within the loan period, the end time is the full period. If there are other bookings before the end of the loan period, the due date is set to the beginning of the short loan times buffer of the earliest booking. This changes the period in the booking to reflect the new start and end times.

3. If the patron has not made a short loan request for the item and there are no bookings made for that item that fall within the loan period, the item is charged. The due date is the full length of the loan period specified on the **Short Loan Matrix** tab, in the **Circulation - Policy Definitions** workspace, in the System Administration module.
4. If the patron has not made a short loan request for an item and there are bookings made for the item, the **Item Blocks and Information** dialog box opens informing the user that the item is scheduled for a short loan request on [date] at [time].

Clicking **Cancel** discards the charge in process. If override is enabled, clicking **Override** ignores any bookings in the loan period and charges the item to the patron.

For information on the early pickup window, unclaimed interval, loan period, and short loan times buffer, see *Policies Tab* in the *Voyager System Administration User's Guide*.

---



### Introduction

---

The Item Distribution function allows you to manage items which are given away for free to patrons. You can maintain a list of how many of each item you have on hand and automatically place an order when stock is reduced below a certain point. You can also retain a list of vendors for each item and standard delivery times for each item. You can generate reports on which items need to be reordered.

With Item Distribution, you can view, distribute, create, update, order, receive, and delete items for distribution.

### Purpose of This Chapter

---

This chapter discusses the following

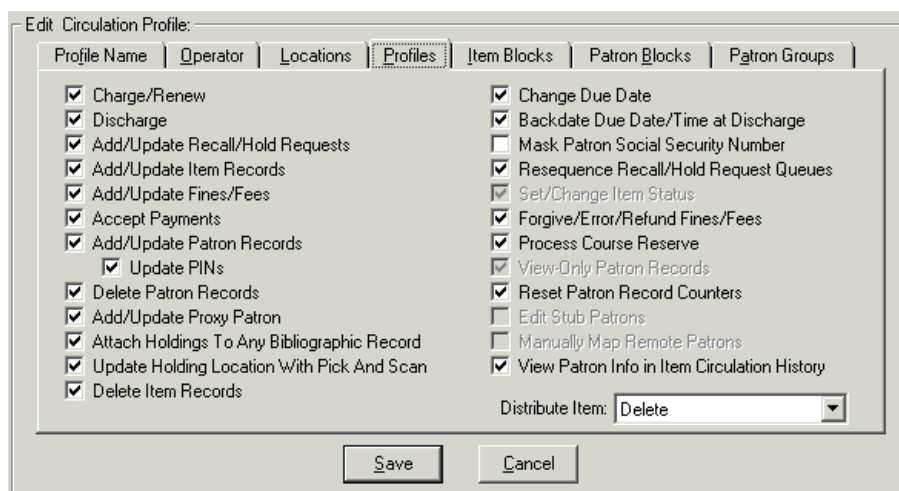
- security needed for Item Distribution
- **Item Distribution** workspace
- searching for and Viewing Items
- distributing Items from the **Charge** workspace
- distributing Items from the **Item Distribution** workspace
- completing the **Item Distribution Inventory** dialog box to make Items distributable

- updating Inventory Information
- automatically ordering distributable items
- deleting distributable items
- viewing items that have been distributed
- printing a distributable item list

## Security

---

Depending on your security profile, you may be allowed to work with items for distribution. The **Distribute Item** field on the **Profiles** tab in the **Security - Circulation Profile** workspace in the System Administration module defines the level of security operators have regarding distributing items (see [Figure 11-1](#)).



**Figure 11-1. Distribute Items on the Profiles Tab**

See *Circulation Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information.

## Item Distribution Workspace

---

The operator can handle distributable items using the **Item Distribution** workspace (as shown in [Figure 11-2](#)).

**NOTE:**

MARC information that displays in the **Item Distribution** workspace is in the Latin-1 character set.

Search By	Condition	Search For	Operator
→ On-Hand Quantity	greater	0	

Search Results: 1 records found.

Active?	Title	Location	Enum/Chron	Call Number	On Hand	Active Barcode	Expected Date
Y	Map of Chicago Transit	Circulation Desk	/ / 0		9		

**Figure 11-2. Item Distribution Workspace**

[Table 11-1](#) describes the **Item Distribution** workspace.

**Table 11-1. Item Distribution Workspace**

Name	Description
<b>Searching section</b>	
Search By	Select the type of search from this drop-down menu.
Condition	Depending on the searching option you select, <b>equal</b> may be the only Condition available.
Search For	Enter the search criteria in this field.
Operator	If using additional search criteria, select <b>AND</b> , <b>OR</b> , or <b>NOT</b> to combine terms.
Find button	Executes the search.
Clear button	Clears the search section of the <b>Item Distribution</b> workspace.
<b>Search Results section</b>	
Active?	Displays a Y, indicating it is an active item and therefore available to distribute.  If the item is inactive, it may not be distributed.
Title	Title of the item(s) that match the search criteria.

**Table 11-1. Item Distribution Workspace**

Name	Description
Location	Location of the item(s) that match the search criteria.
Enum/Chron	Enumeration and Chronology of the item(s) that match the search criteria.
Call Number	Call Number of the item(s) that match the search criteria.
On-Hand	Number of items on-hand, that is, available for distribution.
Active Barcode	Barcode of the item(s) that match the search criteria.
Expected Date	If ordered, the date on which the order should arrive.
Distribute button	Opens the <b>Patron Search</b> dialog box. See <a href="#">Distributing Items Through the Item Distribution Workspace</a> on <a href="#">page 11-7</a> .
Inventory button	Opens the <b>Item Distribution Inventory</b> dialog box. See <a href="#">Completing the Item Distribution Inventory Dialog Box</a> on <a href="#">page 11-12</a> .
Print button	Prints the item distribution list.
Delete button	Deletes the selected information.
Close button	Closes the <b>Item Distribution</b> workspace.

## Searching and Viewing Items for Distribution

---

Operators may search for and view distributable items in the Circulation module.

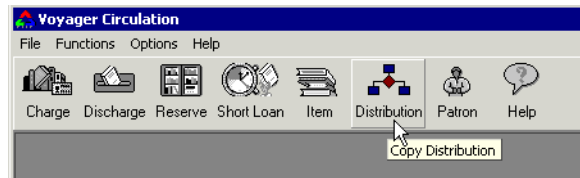


### Procedure 11-1. Searching and Viewing Items for Distribution

---

Use the following to search for and view items for distribution:

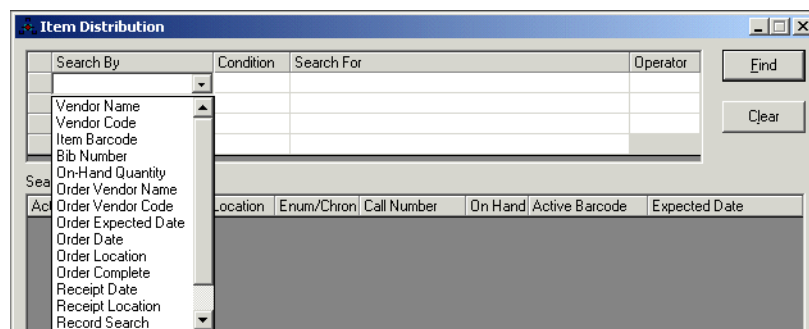
1. After logging in to the Circulation module, click the **Distribution** button ([Figure 11-3](#)) from the Circulation toolbar or select **Item Distribution** from the **Functions** menu (**Ctrl + B**).



**Figure 11-3. Distribution Button**

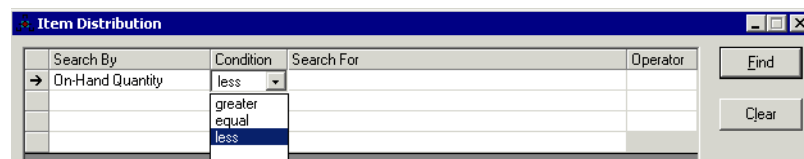
Result: The **Item Distribution** workspace opens.

Click the drop-down arrow in the **Search By** field to display the searching options (see [Figure 11-4](#)) and select the appropriate search option.



**Figure 11-4. Search By Menu**

2. Click the drop-down arrow in the **Condition** field to select the condition: **greater**, **equal** or **less**.



**Figure 11-5. Condition Menu**

3. Enter your search terms in the **Search For** field.
4. Click the drop-down arrow in the **Operator** field to select **AND**, **OR**, or **NOT** to combine search options.
5. Click the **Find** button to execute your search or click the **Clear** button to clear the contents of the entire screen.

Result: The search results display in the bottom half of the **Item Distribution** workspace (see [Figure 11-6](#)).

---

The screenshot shows a software window titled "Item Distribution". At the top, there is a search interface with four fields: "Search By" (containing a right arrow), "Condition" (containing "greater"), "Search For" (containing "0"), and "Operator" (empty). To the right of these fields are "Find" and "Clear" buttons. Below the search fields, it says "Search Results: 1 records found." followed by a table. The table has columns: "Active?", "Title", "Location", "Enum/Chron", "Call Number", "On Hand", "Active Barcode", and "Expected Date". The first row of data shows "Y", "Map of Chicago Transit", "Circulation Desk", " / / 0", an empty "Call Number", "9", an empty "Active Barcode", and an empty "Expected Date". Below the table is a large grey rectangular area. At the bottom of the window are buttons for "Distribute", "Inventory", "Print", "Delete", and "Close".

Search By	Condition	Search For	Operator
→ On-Hand Quantity	greater	0	

Search Results: 1 records found.

Active?	Title	Location	Enum/Chron	Call Number	On Hand	Active Barcode	Expected Date
Y	Map of Chicago Transit	Circulation Desk	/ / 0		9		

Distribute Inventory Print Delete Close

---

**Figure 11-6. Item Distribution Workspace with Search Results**

---

## Distributing Items Through the Charge Workspace

---

Distributing items through the **Charge** workspace is identical to charging out regular items.





### Procedure 11-2. Distributing Items through Charging

Use the following to distribute the items through charging:

1. After logging in to the Circulation module, click the **Charge** button from the Circulation toolbar or select **Charge/Renew** from the **Functions** menu.

Result: The **Charge** workspace opens.

2. In the **Barcode** field enter the barcode of the patron to whom you will distribute the item. You can also search for a patron by clicking the ellipsis button.
3. In the **Item Barcode** field enter the barcode of the distributable item. You can also search for the item by clicking the ellipsis button.

Result: The distributable item is charged to the patron and displays in the charged items list at the bottom of the **Charge** workspace.

A **D** for distribution displays in the **Status** column of the charged items list, rather than **C** for charge or **R** for renew.

## Distributing Items Through the Item Distribution Workspace

Items may also be distributed using the **Item Distribution** workspace.



### Procedure 11-3. Distributing Items through the Item Distribution Workspace

Use the following to distribute items through the **Item Distribution** workspace.

1. After logging in to the Circulation module, click the **Distribution** button from the Circulation toolbar or select **Item Distribution** from the **Functions** menu (**Ctrl + B**).

Result: The **Item Distribution** workspace opens.

2. Search for the item that you want to distribute, using [Procedure 11-1, Searching and Viewing Items for Distribution](#), on page [11-4](#).

Result: The results display in the **Search Results** list (see [Figure 11-7](#)).

The screenshot shows a software window titled "Item Distribution". At the top, there is a search criteria table with columns: Search By, Condition, Search For, and Operator. The first row contains "On-Hand Quantity", "greater", "0", and an empty operator field. To the right of this table are "Find" and "Clear" buttons. Below the search criteria is a section labeled "Search Results: 7 records found." containing a table with the following data:

Active?	Title	Location	Enum/Chron	Call Number	On Hand	Active Barcode	Expected Date
Y	Map of Chicago Transit	Circulation Desk	/ / / 0		8	456123	
Y	Passionate angler,	Circulation Desk	/ / / 0	SH439 .W47	28	39550002454789	10/30/2002
Y	Purakutisu = practice : journal of practical diabetes /	Circulation Desk	/ / / 0		40	40782	
Y	Purakutisu = practice : journal of practical diabetes /	Circulation Desk	/ / / 0		49	40782	
Y	I can be president /	Circulation Desk	/ / / 0	JK517 .B43 1984	30	40367	9/20/2002

At the bottom of the window are buttons for "Distribute", "Inventory", "Print", "Delete", and "Close".

**Figure 11-7. Item Distribution Workspace with Search Results**

3. Select the item from the list of items that you want to distribute and click the **Distribute** button.

Result: The **Patron Search** dialog box opens (see [Figure 11-8](#)).

The screenshot shows the 'Item Distribution' application window. At the top, there is a search form with fields for 'Search By' (set to 'On-Hand Quantity'), 'Condition' (set to 'greater'), and 'Search For' (set to '0'). There are 'Find' and 'Clear' buttons. Below this, a table displays search results for 7 records. The table has columns: Active?, Title, Location, Enum/Chron, Call Number, On Hand, Active Barcode, and Expected Date. The first row is highlighted. Overlaid on this is a 'Patron Search' dialog box. This dialog has a 'Search By' section with four radio buttons: Name (selected), SSN, Barcode, and Institution Id. It also has 'Find' and 'Cancel' buttons. At the bottom of the dialog are text input fields for 'Last', 'First', and 'Middle' names. The main application window also has buttons for 'Distribute', 'Inventory', 'Print', 'Delete', and 'Close' at the bottom.

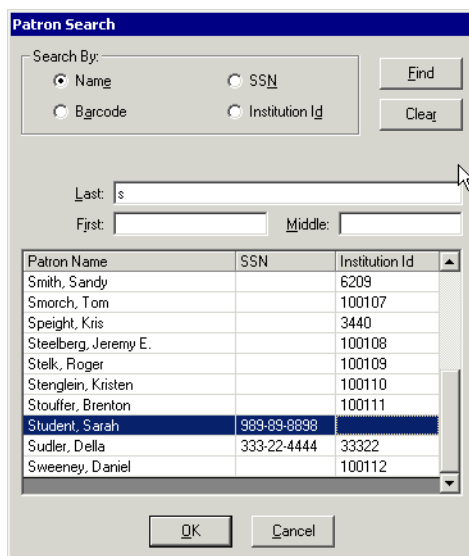
Active?	Title	Location	Enum/Chron	Call Number	On Hand	Active Barcode	Expected Date
Y	Map of Chicago Transit	Circulation Desk	/ / / 0		8	456123	10/30/2002
Y	Passionate and						
Y	Purakutisu = practice : journ practical diabe						
Y	Purakutisu = practice : journ practical diabe						
Y	I can be presid						9/20/2002

**Figure 11-8. Patron Search Dialog Box**

4. Search for the patron to whom you are distributing the item. You can perform a search based on Name, Social Security Number, Barcode, or Institution ID. See [Searching for a Patron Record](#) on [page 3-2](#) for more information.

Result: The **Patron Search** dialog box displays patrons matching the search criteria.

5. Select the patron to whom the item should be distributed ([Figure 11-9](#)) and click **OK**.



The **Patron Search** dialog box contains a 'Search By' section with four radio buttons: **Name** (selected), **SSN**, **Barcode**, and **Institution Id**. To the right are **Find** and **Clear** buttons. Below this are input fields for **Last:** (containing 's'), **First:** (empty), and **Middle:** (empty). A table lists search results with columns **Patron Name**, **SSN**, and **Institution Id**. The row for **Student, Sarah** is highlighted. At the bottom are **OK** and **Cancel** buttons.

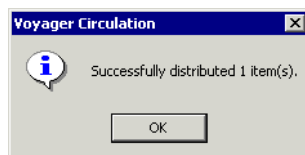
Patron Name	SSN	Institution Id
Smith, Sandy		6209
Smorch, Tom		100107
Speight, Kris		3440
Steelberg, Jeremy E.		100108
Stelk, Roger		100109
Stenglein, Kristen		100110
Stouffer, Brenton		100111
<b>Student, Sarah</b>	<b>989-89-8898</b>	
Sudler, Della	333-22-4444	33322
Sweeney, Daniel		100112

---

**Figure 11-9. Selecting the Patron to Charge the Distributable Item to**

Result: A message indicating the item was distributed displays (see [Figure 11-10](#)).

---



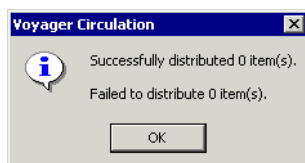
---

**Figure 11-10. Successful Distribution Message**

- Click the **OK** button to close the message and return to the **Item Distribution** workspace. Also, the total number of items listed in the **On Hand** column of the search results is automatically reduced by one.

**NOTE:**

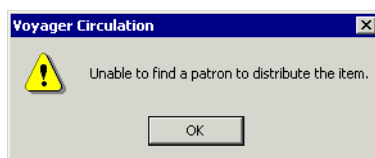
If the item cannot be distributed, a message displays (see [Figure 11-11](#)).



**Figure 11-11. Unable to Distribute Message**

**NOTE:**

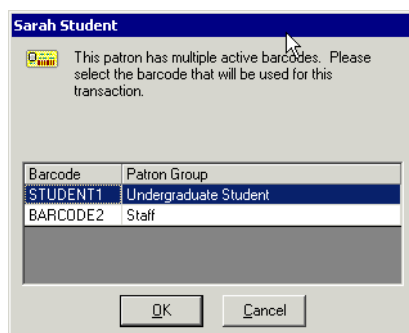
If the patron to whom the item should be distributed is not found, a message displays (see [Figure 11-12](#)).



**Figure 11-12. Unable to Find Patron Message**

**NOTE:**

If the patron has multiple active barcodes, the operator must select one to distribute the item to (see [Figure 11-13](#)).

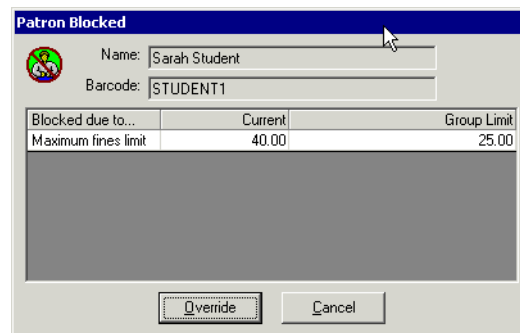


**Figure 11-13. Patron with Multiple Barcodes to Receive Distribution**

**NOTE:**

If the patron is blocked for any reason, a message displays (see [Figure 11-14](#)). An operator with override authority for that particular block must override the block to continue the distribution.

---



---

**Figure 11-14. Item Distribution Blocked**

7. When returned to the **Item Distribution** workspace, click the **Close** button to close the **Item Distribution** workspace.
- 

## Completing the Item Distribution Inventory Dialog Box

---

In the **Item Distribution Inventory** dialog box (as shown in [Figure 11-15](#)), operators can perform the following operations:

- make items distributable
- create the order defaults for the item, update orders, and order items
- receive orders

**Figure 11-15. Item Distribution Inventory Dialog Box**

[Table 11-2](#) describes the **Item Distribution Inventory** dialog box.

**Table 11-2. Item Distribution Inventory Dialog Box**

Name	Description
On-Hand Quantity	Number of items available for distribution.
Active check box	Makes the item available for distribution. It is considered Active. The default is selected.
Total Distributed	Total number of this item already distributed.
<b>Order Defaults section</b>	

**Table 11-2. Item Distribution Inventory Dialog Box**

Name	Description
Auto Reorder check box	<p>Allows this item to be automatically reordered when the quantity of items falls below the value in the <b>Reorder Point</b> field.</p> <p><b>NOTE:</b> Automatically reordered means only that an order is entered into the Order Status list on the <b>Distribution Item Inventory</b> dialog box. See <a href="#">Automatically Ordering Distributable Items</a> on <a href="#">page 11-25</a>.</p>
Reorder Point	<p>When the number of items on-hand reaches this number the item should be reordered.</p> <p><b>NOTE:</b> If zero is entered, the system looks for the value for that field specified on the <b>Items</b> tab of the <b>Circulation - Policy Definitions</b> workspace of the System Administration module.</p>
Order Quantity	<p>Number of items to be ordered.</p> <p><b>NOTE:</b> If zero is entered, the system looks for the value for that field specified on the <b>Items</b> tab of the <b>Circulation - Policy Definitions</b> workspace of the System Administration module.</p>
Default Source	Vendor from whom this item is typically ordered. Enter the vendor's code.
Created section	Displays file creation information such as the create location, operator, and date.
Last Updated section	Displays information on the latest modification such as the update location, operator, and date.



**Table 11-2. Item Distribution Inventory Dialog Box**

Name	Description
Order Status section	Displays a list of current and prior orders and their statuses. The information that displays in the Order Status section includes: <ul style="list-style-type: none"> <li>• Expected Date</li> <li>• Vendor Code</li> <li>• Order Quantity</li> <li>• Outstanding Quantity</li> <li>• Operator ID</li> <li>• Location</li> <li>• Order Date</li> <li>• Complete?</li> <li>• Claim Interval</li> </ul>
Order button	Opens the <b>Item Distribution Order</b> dialog box where operators can manually place orders for more items.  Only active after an order has been saved.
Receive button	Opens the <b>Item Distribution Receive</b> dialog box where operators can receive orders.  Only active when an order in the Order Status section is selected.
Save button	Saves the current order information.
Close button	Closes the <b>Item Distribution Inventory</b> dialog box.

**Procedure 11-4. Completing the Items Distribution Inventory Dialog Box**

Use the following to complete the **Item Distribution Inventory** dialog box to make an item distributable and create order defaults:

1. After logging in to the Circulation module, click the **Distribution** button from the Circulation toolbar or select **Item Distribution** from the **Functions** menu (**Ctrl + B**).

Result: The **Item Distribution** dialog box opens.

2. Search for the item that you want to distribute, using [Procedure 11-1, Searching and Viewing Items for Distribution](#), on page [11-4](#).

Result: The results display in the search results list (see [Figure 11-16](#)).

**Item Distribution**

Search By	Condition	Search For	Operator
→ Bib Number	equal	55265	

Find Clear

Search Results: 1 records found.

Active?	Title	Location	Enum/Chron	Call Number	On Hand	Active Barcode	Expected Date
	Using the Endeavor University Library	Circulation Desk	/ / / 0			LIBBROCHURE1	

Distribute Inventory Print Delete Close

---

**Figure 11-16. Item Distribution Dialog Box**

3. Highlight the item from the list of items that you want to make distributable and click the **Inventory** button.

Result: The **Item Distribution Inventory** dialog box opens (see [Figure 11-17](#)).

### Item Distribution Inventory

#### Using the Endeavor University Library

On-Hand Quantity:  ☒ Active

Total Distributed:

Order Defaults

☐ Auto Reorder

Reorder Point:

Order Quantity:

Default Source:  ...

Created

Location:

Operator:

Date:

Last Updated

Location:

Operator:

Date:

Order Status

Expected Date	Vendor Code	Order Quantity	Outstanding Quantity	Operator Id	Location

Order

Receive

Save

Close

**Figure 11-17. Item Distribution Inventory Dialog Box**

4. Enter the number of items you currently have in the **On-Hand Quantity** field.
5. Select the **Active** check box to make this item available for distribution.
6. In the **Order Defaults** section, select the **Auto Reorder** check box if needed.
7. Enter a value for the **Reorder Point**.
8. Enter the number of items to be ordered in the **Order Quantity** field.
9. Type the vendor code for the standard vendor from whom this item is typically ordered in the **Default Source** field.

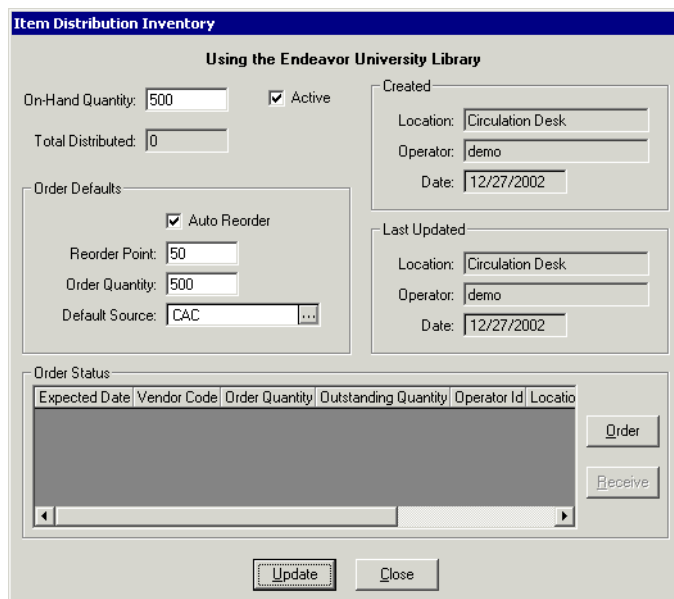
**NOTE:**

If you do not know the vendor code, click the ellipsis button to display the **Vendor Search** dialog box. This searches all vendor records maintained in your database. Select the vendor in the results list and click **OK**. The vendor code fills in the **Default Source** field.

- Click the **Save** button to save the current information. Otherwise, click the **Close** button to close the dialog box.

If you click **Close** without clicking **Save**, you are prompted as to whether you want to save or discard the information entered.

---



The **Item Distribution Inventory** dialog box is titled "Using the Endeavor University Library". It contains several input fields and checkboxes. On the left, "On-Hand Quantity" is set to 500, "Total Distributed" is 0, and "Active" is checked. Below these, "Order Defaults" includes "Auto Reorder" checked, "Reorder Point" at 50, "Order Quantity" at 500, and "Default Source" set to CAC. On the right, "Created" and "Last Updated" sections both show "Location: Circulation Desk", "Operator: demo", and "Date: 12/27/2002". At the bottom, there is an "Order Status" table with columns: Expected Date, Vendor Code, Order Quantity, Outstanding Quantity, Operator Id, and Location. The table is currently empty. To the right of the table are "Order" and "Receive" buttons. At the very bottom are "Update" and "Close" buttons.

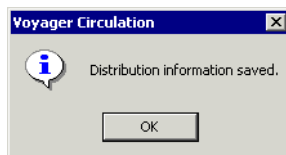
---

**Figure 11-18. Item Distribution Inventory Completed**

11. Click the **Save** button.

Result: The **Item Distribution Inventory** dialog box is completed ([Figure 11-18](#)) and the information saved (see [Figure 11-19](#)).

---



---

**Figure 11-19. Item Distribution Information Has Been Saved Message**

---



### Procedure 11-5. Manually Ordering Items

Use the following to manually order distributable items:

1. Once the information has been saved in the **Item Distribution Inventory** dialog box, you can manually place an order for more items by accessing the **Item Distribution Inventory** dialog box and clicking the **Order** button.

Result: This opens the **Item Distribution Order** dialog box (see [Figure 11-20](#)).

**Figure 11-20. Item Distribution Order dialog box**

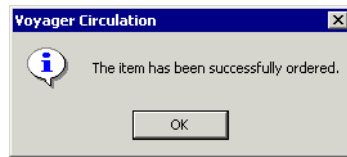
2. Specify a vendor source for the items by clicking the **Source** button and searching for a vendor or by entering the appropriate vendor code.

**NOTE:**

If a vendor code was added to the **Default Source** field of the **Item Distribution Inventory** dialog box, that vendor code displays in the **Source** field.

3. Enter the number of the items that you want to order in the **Quantity** field.
4. Enter the date that the items are expected to arrive in the **Expected** field.
5. Click the **OK** button to accept the order information or **Cancel** to discard the information. When the system has saved the order a message displays (see [Figure 11-21](#)).

Result: If clicked **OK**, the item is ordered.



---

**Figure 11-21. Item Ordered Message**

---



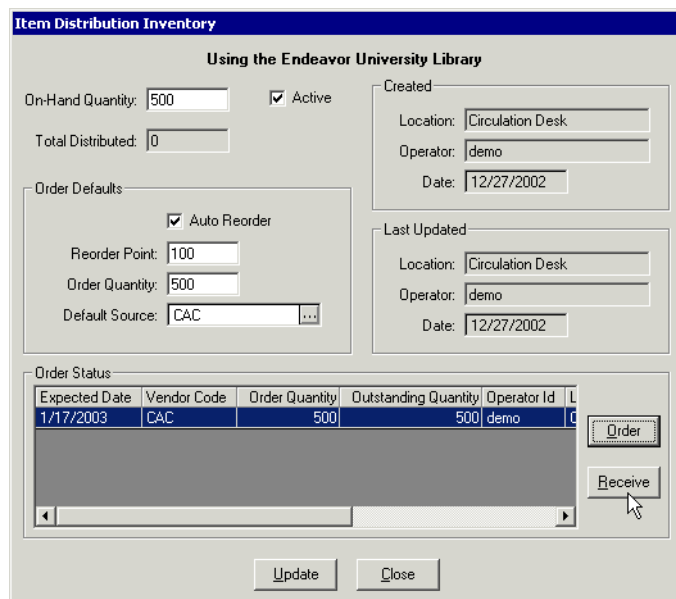
### **Procedure 11-6. Receiving Orders of Distributable Items**

---

If an order has already been delivered and you have the items on hand, you can indicate that some or all of the contents of the order has been received.

Use the following to receive an order.

1. Access the **Item Distribution Inventory** dialog box, select the order you want to receive in the **Order Status** list (see [Figure 11-22](#)).



**Item Distribution Inventory**

Using the Endeavor University Library

On-Hand Quantity: 500 ☒ Active

Total Distributed: 0

Order Defaults:

☒ Auto Reorder

Reorder Point: 100

Order Quantity: 500

Default Source: CAC

Created:

Location: Circulation Desk

Operator: demo

Date: 12/27/2002

Last Updated:

Location: Circulation Desk

Operator: demo

Date: 12/27/2002

Order Status:

Expected Date	Vendor Code	Order Quantity	Outstanding Quantity	Operator Id	L
1/17/2003	CAC	500	500	demo	t

Order

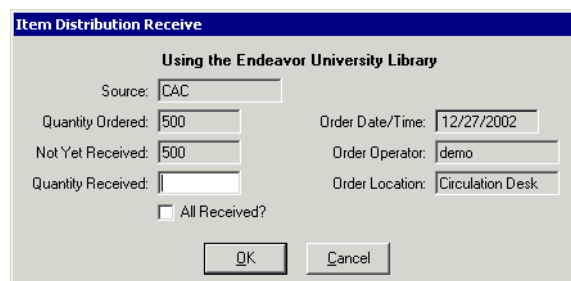
Receive

Update Close

**Figure 11-22. Item Distribution Inventory Dialog Box**

- Click the **Receive** button.

Result: The **Item Distribution Receive** dialog box opens ([Figure 11-23](#)) and the order information displays.



**Item Distribution Receive**

Using the Endeavor University Library

Source: CAC

Quantity Ordered: 500

Not Yet Received: 500

Quantity Received: 0

☐ All Received?

Order Date/Time: 12/27/2002


Order Operator: demo

Order Location: Circulation Desk

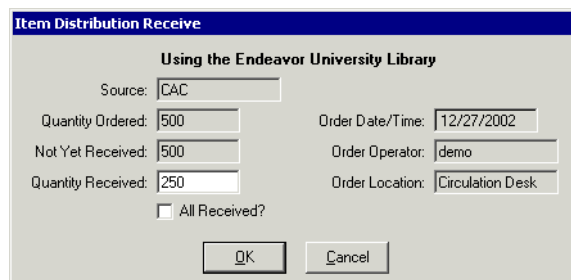
OK Cancel

**Figure 11-23. Item Distribution Receive Dialog Box**

3. Receive the item(s) as follows:

If	Then
The arrival of this shipment of items is incomplete.	Enter the number of items received in the <b>Quantity Received</b> field (see <a href="#">Figure 11-24</a> ).
The arrival of this shipment of items completes the order.	Select the <b>All Received?</b> check box.   <b>IMPORTANT:</b> <i>Selecting this check box updates the Complete? column of the order status. It is not dependent on receiving all of the volumes ordered.</i>

---

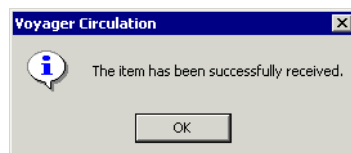


The dialog box is titled "Item Distribution Receive" and has a subtitle "Using the Endeavor University Library". It contains several input fields: "Source" with the value "CAC", "Quantity Ordered" with "500", "Not Yet Received" with "500", and "Quantity Received" with "250". To the right, there are fields for "Order Date/Time" (12/27/2002), "Order Operator" (demo), and "Order Location" (Circulation Desk). At the bottom left is a checkbox labeled "All Received?". At the bottom right are "OK" and "Cancel" buttons.

---

**Figure 11-24. Item Distribution Receive Dialog Box Completed**

4. Click the **OK** button to accept the order information. Otherwise, click **Cancel** to discard the information.
5. When you are done adding or updating the item information, click the **Update** button to save any changes (see [Figure 11-25](#)).
- 



---

**Figure 11-25. Item Has Been Received Message**



6. Click the **Close** button to close the dialog box.

If you click **Close** without clicking **Update**, you are prompted to save or discard the information you entered.

Result: If updated, the order is received.

---

### **Updating Inventory Information**

---

Use the following to update the inventory information for distributable items:

1. Select **Item Distribution** from the **Functions** menu (**Ctrl + B**) or click the **Distribution** button on the toolbar.

Result: The **Item Distribution** dialog box opens.

2. Search for the distributable item. See [Procedure 11-1, Searching and Viewing Items for Distribution](#), on page [11-4](#).
3. Highlight the item that you want to update and click the **Inventory** button.

Result: The **Item Distribution Inventory** dialog box opens (see [Figure 11-26](#)).

**Item Distribution Inventory**  
Using the Endeavor University Library

On-Hand Quantity: 750 ☒ Active  
Total Distributed: 0

Order Defaults:  
☒ Auto Reorder  
Reorder Point: 100  
Order Quantity: 500  
Default Source: CAC ...

Created:  
Location: Circulation Desk  
Operator: demo  
Date: 12/27/2002

Last Updated:  
Location: Circulation Desk  
Operator: demo  
Date: 12/27/2002

Order Status:

Expected Date	Vendor Code	Order Quantity	Outstanding Quantity	Operator Id	L
1/17/2003	CAC	500	250	demo	0

Order  
Receive  
Update  
Close

**Figure 11-26. Item Distribution Inventory Dialog Box**

4. Enter a new value in the **On-Hand Quantity** field to change the on-hand inventory.

Result: When you click the **Update** button, a dialog box opens asking The On-Hand Quantity has changed. Are you sure? Click **Yes** to update the total or click **No** to discard the change.

**NOTE:**

Update this information if you know that the total of your stock on-hand does not match this number because it is automatically updated when items are received.

5. Select the **Active** check box if you wish to make this item available for distribution since inactive items cannot be distributed.
6. In the **Order Defaults** section, select the **Auto Reorder** check box to allow this item to be automatically reordered when the quantity of items falls below the value in the **Reorder Point** field. The order is for the number of items in the **Order Quantity** field.
7. Click the **Default Source** button to assign a standard vendor from whom this item is typically ordered.

The **Order Status** section displays a list of current and prior orders and their statuses.

8. If wanted, the operator can order or receive items. See [Procedure 11-5, Manually Ordering Items](#), on page 11-19, and [Procedure 11-6, Receiving Orders of Distributable Items](#), on page 11-20.
9. When you are done updating the item information, click the **Update** button and then click the **Close** button to close the dialog box.

If you click **Close** without clicking **Update**, you are prompted to save or discard the information you entered.

Result: The item is updated.

---

## Automatically Ordering Distributable Items

---

In order to automatically place orders for items of which your stock is low, **Circjob #28 - Distribution Item Order** report must be run.

### NOTE:

Placing orders in the Voyager system means only that an order is entered in the Order Status list on the **Distribution Item Inventory** dialog box. Your vendors do not automatically receive any purchase orders. You must manually create and send purchase orders to your vendors.

When you run this report, you receive a list of all the distributable items that have Automatic Reordering activated *and* have inventory levels below the Reorder Point. You can use this list to decide whether you want to place orders for all of the items on the list or only specific ones.

The report that is created includes all the default ordering information, including the vendor name and address and the default order quantity. You can use Microsoft® Access to format this report into printable orders that can be sent to your vendors.

When you run the report, you are prompted with the question:

Create Orders [Y/N]?

- Answer **N** if you are just running the report for your own information and you do not plan to send orders to vendors. This allows you to simply get a list of items or perform test runs. This may be helpful when you want to place the orders manually because you needed to change vendor or quantity information. When you answer **N**, no changes are made to the database itself.

- Answer **Y** when you plan to send orders to the vendors. In this case you get the report *and* all the appropriate orders are entered into the database.



**IMPORTANT:**

*You still need to manually **generate** orders for all of the items in the list and submit those to your vendors.*

You can tell whether a report was accompanied by the placement of orders by looking in the “operator ID” field of the report itself.

- If you answered **N** (meaning that no orders were placed), the operator ID is **TEST**.
- If you answered **Y**, the operator ID is **SYSTEM**.

Bear in mind that Circjob 28 is intended primarily to execute the automatic reorder functionality of the distributable items. If you wish to see reports of inventory levels for items that do not have the Automatic Reorder box selected or items that are not yet below the reorder point or if you want to see reports of orders that have been placed but not yet received, the proper way to do all of those things is by a direct query against the database using either native Oracle® SQL or Microsoft Access.

See the *Voyager Reporter User's Guide* for more information on running Circjob 28.

## Deleting a Distributable Item

---

You can delete the distribution inventory information for a particular item. This *does not* delete the MARC record for that item. It only deletes the inventory information for that item.

Once the inventory information has been deleted for an item, that item can no longer be treated as a distributable item (unless new inventory information is subsequently added to the item).



### Procedure 11-7. Deleting the Item Distribution Information

---

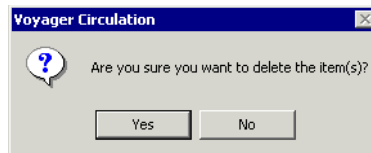
Use the following to delete all inventory records for a distributable item.

1. Select **Item Distribution** from the **Functions** menu (**Ctrl + B**) or click the **Item Distribution** button on the toolbar.

Result: The **Item Distribution** dialog box opens.

2. Search for the item that you want to delete. See [Procedure 11-1, Searching and Viewing Items for Distribution](#), on page 11-4.
3. From the list of items that displays, select the item that you want to delete and click the **Delete** button.

Result: A confirmation message displays (see [Figure 11-27](#)).



**Figure 11-27. Message to Confirm Deleting the Item Inventory Information**

4. Click **Yes** to delete the item. Otherwise, click **No** to not delete the item.

Result: The item inventory is deleted.

## Viewing Distributed Items

Operators can view the total number of items that have been distributed. They can also view the total number of items that have been distributed to a specific patron.

Also, if wanted, a report of an item's distribution history can be created, see [Item's Distribution History](#).



### Procedure 11-8. Viewing the Total Number of Distributed Items

Use the following to view the total number of pieces of a particular item that have been distributed:

1. Select **Item Distribution** from the **Functions** menu (**Ctrl + B**) or click the **Item Distribution** button on the toolbar.

Result: The **Item Distribution** dialog box opens.

2. Search for the item that you want to view, using [Procedure 11-1, Searching and Viewing Items for Distribution](#), on page 11-4.
3. Select the item from the list of items that you want to view and click the **Inventory** button.

Result: The **Item Distribution Inventory** dialog box opens and the **Total Distributed** field displays the total number of pieces of that particular item that have been distributed.

---

**Item Distribution Inventory**  
Using the Endeavor University Library

On-Hand Quantity: 745 ☒ Active  
Total Distributed: 5

Order Defaults:  
☒ Auto Reorder  
Reorder Point: 100  
Order Quantity: 500  
Default Source: CAC ...

Created:  
Location: Circulation Desk  
Operator: demo  
Date: 12/27/2002

Last Updated:  
Location: Circulation Desk  
Operator: demo  
Date: 12/27/2002

Order Status:

Expected Date	Vendor Code	Order Quantity	Outstanding Quantity	Operator Id	L
1/17/2003	CAC	500	250	demo	0

Order  
Receive  
Update Close

---

**Figure 11-28. Total Distributed**

---



### **Procedure 11-9. Viewing Items Distributed to a Specific Patron**

---

Use the following to view the total number of distributable items given to a patron:

1. Select **Patron** from the **Functions** menu (**Ctrl + P**) or click the **Patron** button.

Result: The **Patron Search** dialog box opens.

2. Enter the patron's information into the fields and click the **OK** button.

You can perform a search based on Name, Social Security Number, Barcode or Institution ID. See [Searching for a Patron Record](#) on [page 3-2](#) for more information on searching.

3. From the patron record click the **Counters** button.

Result: The total number of items distributed to a patron displays in the **Historical Distributions** field (see [Figure 11-29](#)).

The dialog box titled "Set Patron Counters" displays the name "Sarah Student" in a text field. Below the name, there are several input fields with their corresponding historical values:

Field	Value
Items Borrowed (historical):	10
Claims Returned:	0
Lost Items:	0
Self-Shelves:	1
Call Slips Placed (historical):	0
Short Loans Placed (historical):	0
Item Distributions (historical):	2

At the bottom of the dialog box are "OK" and "Cancel" buttons.

**Figure 11-29. Patron Counters Dialog Box Showing Historical Distributions**

## Item's Distribution History

The operator can create a report of which patrons received which distributable items using the information in the DISTRIBUTION\_TRANSACTIONS table if they have configured the retention of patron information.

In the System Administration module, if the **Retain Patron Id for Distribution History** check box (located in the **System - Miscellaneous** workspace) is selected, all patron IDs are retained. See *Miscellaneous* in the *Voyager System Administration User's Guide* for more information about this check box.

If addition, if the Retain Patron ID batch job, Circjob 38, runs, the specified number of patrons information associated with a distributed item is retained. See the *Voyager Technical User's Guide* for information about this job.

## Printing a Distributable Item List

---

Operators can print a distributable item list.



### Procedure 11-10. Printing a Distributable Item List

---

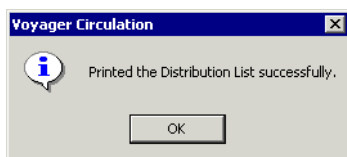
Use the following to print a distributable item(s) list:

1. Select **Item Distribution** from the **Functions** menu (**Ctrl + B**) or click the **Item Distribution** button on the toolbar.

Result: The **Item Distribution** dialog box opens.

2. Search for the list of items, using [Procedure 11-1, Searching and Viewing Items for Distribution](#), on page [11-4](#).
3. Select the item(s) from the list of items that you want to print by clicking on them (hold the **Ctrl** key while clicking to select more than one item) and click the **Print** button.

Result: All of the currently selected items are printed on the list and a message displays (see [Figure 11-30](#)).



---

**Figure 11-30. Item Distribution List Printed**

Users can customize the format in which the list prints, changing heading information, font sizes, and other details. See [Item Distribution Stanza](#) on [page A-49](#).

---



## **Introduction**

---

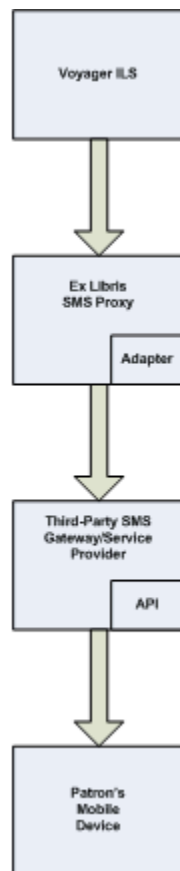
SMS (Short Message Service) capability has been incorporated into Voyager to provide institutions with more flexibility for staff to communicate with patrons. Specifically, patrons may choose to receive circulation notices (per [Circulation Notices](#) on [page 12-5](#)) via their mobile devices.

Since SMS is a configurable feature, each institution has the option to choose if it is implemented. The SMS feature is intended to augment the existing features for print and/or e-mail notices. These traditional capabilities remain available.

Implementation of SMS includes the following components:

- Voyager ILS SMS feature
- Ex Libris SMS Proxy
- Third-party SMS gateway/service provider's software
- Patron's mobile device

See [Figure 12-1](#) for an illustration of the flow of a notice from the Voyager ILS to the patron's mobile device and the components involved.



---

**Figure 12-1. Components/Path for Voyager SMS Notices Sent**

**NOTE:**

The Voyager SMS feature is designed for one-way transmission, messages to be sent outbound to patrons. There is no mechanism for receiving messages.

## Implementation

---

In order to implement SMS, you need to:

- Purchase credits from an SMS gateway/service provider (see [SMS Gateway/Service Providers](#) on [page 12-3](#))
- Install the SMS gateway/service provider's software (see [SMS Gateway/Service Providers](#) on [page 12-3](#))

- Install Ex Libris SMS Proxy software (see [Ex Libris SMS Proxy](#) on [page 12-4](#))
- Set up/configure Voyager (see [Voyager Setup/Configuration](#) on [page 12-4](#))
  - Circulation notices (see [Circulation Notices](#) on [page 12-5](#))
  - `webvoyage.properties` (see [webvoyage.properties](#) on [page 12-6](#))
  - `voyager.env` (see [voyager.env](#) on [page 12-7](#))
  - `SmsProxyConf.xml` (see [SmsProxyConf.xml](#) on [page 12-7](#))
  - `Pcircjob/Pmediajob` (see [Pcircjob/Pmediajob](#) on [page 12-9](#))
- Set up the patron (see [Patron SMS Number](#) on [page 12-9](#))
- Set up logging for SMS (see [SMS Send Status Log](#) on [page 12-11](#))

## **SMS Gateway/Service Providers**

---

The SMS gateway/service provider's software/service bridges the connection between the Ex Libris SMS Proxy software (see [Ex Libris SMS Proxy](#) on [page 12-4](#)) and the patron's mobile device. The SMS gateway handles SMS operations such as routing, that is, forwarding and storing messages on their way to the desired endpoints.

Since each provider has a different method (API) of receiving SMS requests, the Ex Libris SMS Proxy software is needed to convert SMS requests from the main Ex Libris products (such as Voyager, Primo, and so forth) to the appropriate format as defined by the SMS gateway/service providers. This enables the transfer of the following message/routing components:

- User ID
- Password
- Sender phone number
- Destination phone number
- Message text

Prior to implementing Voyager SMS, you need to purchase credits from an SMS gateway/service provider. These can be gateway/service providers for which Ex Libris provides adapters that includes the following service providers, or you can develop adapters for other service providers:

- Clickatell ([www.clickatell.com](http://www.clickatell.com))
- SimpleWire ([www.openmarket.com](http://www.openmarket.com))

When you purchase this service, you get a user ID and password from the provider that needs to be configured into `SmsProxyConf.xml` (see [SmsProxyConf.xml](#) on [page 12-7](#)). For more information regarding Ex Libris adapters for SMS proxy software, refer to [Ex Libris SMS Proxy](#) on [page 12-4](#)).

Regarding gateway service providers, SimpleWire provides the following information regarding the text message length:

- Up to 160 characters if the SMS message contains Unicode code points in the range of 00-7f
- Up to 140 characters if the SMS message contains Unicode code points in the range of 00-ff
- Up to 70 characters if the SMS message contains Unicode code points in the range of 00-ffff

## **Ex Libris SMS Proxy**

---

The Ex Libris SMS Proxy software (provided with your installation) is used to pass SMS messages to gateway/service providers following the providers' defined methods for handling the transaction. The component inside the SMS proxy software that is used to process the transaction is known as an adapter.

With the SMS proxy software, Ex Libris provides adapters for the following SMS gateway/service providers:

- Clickatell ([www.clickatell.com](http://www.clickatell.com))
- SimpleWire ([www.openmarket.com](http://www.openmarket.com))

The architecture of the Ex Libris SMS Proxy software enables adding adapters that you may have written to allow support of providers that are already in use by your institution. Refer to the Developer Zone on the EL Commons collaborative Web site (<http://www.exlibrisgroup.org>).

For more information regarding the Ex Libris SMS Proxy software, refer to the *SMS Proxy User's Guide* available in the Cross Product section of the Ex Libris Documentation Center (Cross\_Product\_Information\_Distributors > Cross\_Product\_Information\_Customers > SMS Proxy).

## **Voyager Setup/Configuration**

---

For the Voyager setup, you need to:

- Confirm that the existing notices meet your requirements or modify them

See [Circulation Notices](#) on [page 12-5](#)).

- Determine if you want patrons to enter their own mobile device numbers via the WebVoyage Patron Information page

If you choose to have patrons enter this information, you need to configure `webvoyage.properties` to display this option.

See [webvoyage.properties](#) on [page 12-6](#).

- Modify the `voyager.env` file to trigger the `Pcircjob` and `Pmediajob` to evaluate if patron SMS numbers should be used for distributing circulation notices.

See [voyager.env](#) on [page 12-7](#).

- Configure the `SmsProxyConf.xml` file with SMS gateway/service provider information

See [SmsProxyConf.xml](#) on [page 12-7](#).

## Circulation Notices

The format/content of circulation notices for SMS messages is set up in the `smsnotices.properties` file that is located in `/ml/voyager/xxxdb/ini/`. See [Figure 12-2](#).

```
<entry key="Media-00">You have a media item that was due on \d: \T</entry>
<entry key="Circ-01">You have an item available for pickup until \d: \T</entry>
<entry key="Circ-02">You have an item that was due on \d: \T</entry>
<entry key="Circ-03">You have an item that has been recalled and is now due on \d: \T</
entry>
<entry key="Circ-04">You have a recalled item that is overdue: \d: \T</entry>
<entry key="Circ-07">You have an item that will be due on \d: \T</entry>
```

**Figure 12-2.** `smsnotices.properties` File

The following notice types can be sent with SMS messaging:

- Circulation and media overdue notices (`circjob2` and `mediajob1`)
- Circulation hold request item available notices (`circjob5`)
- Circulation recall notices (`circjob3`)
- Circulation recall overdue notices (`circjob 2`)
- Circulation courtesy notices (`circjob 7`)

Notices can be a maximum of 160 characters in length with the following formatting characteristics:

- \d is used as the variable placeholder for date  
You can also specify the date format in the `smsnotices.properties` file. The default format is month-day-year (MM-dd-yyyy).
- \T is used as the variable placeholder for the title of the item
- Title references in the messages may be truncated, when sent, if the complete message is going to exceed 160 characters

### **webvoyage.properties**

---

The settings in the `webvoyage.properties` file enables the SMS option to display on the Patron Information page. See [Figure 12-3](#).

The `webvoyage.properties` file is located in `/ml/voyager/xxxdb/tomcat/vwebv/context/vwebv/ui/en_US/` where `xxxdb` represents your database name and `en_US` represents the default skin path.

```
#=====
# SMS number
# Change the Option.SMS to Y to allow patrons to enter an SMS (cell phone) number through
# WebVoyage. Patrons who provide an SMS number are allowing the library to send selected
# circ and media notices via SMS message (text message), as long as the library has
#      configured
# such messages to be sent
#=====
option.SMS=N
```

---

**Figure 12-3. webvoyage.properties File**

---

To activate this feature, you need to change the `option.SMS` setting to `Y`.

The help text associated with the SMS phone number field on the Patron Information page, "If you would like to receive circulation notices from the library on your mobile device ...," (see [Figure 12-8](#)) is set in `pageProperties.xml` (see [Figure 12-4](#)) and may be modified to match your site's requirements.

The `pageProperties.xml` file is located in `/ml/voyager/xxxdb/tomcat/vwebv/context/vwebv/ui/en_US/xsl/userTextConfigs/` where `xxxdb` represents your database name and `en_US` represents the default skin path.

```
<page name="page.myAccount.viewPersonalInfo.smsInstruction" position="aboveContent">
  <div class="instructionText">
    If you would like to receive circulation notices from the library on your mobile
    device, please
    enter the mobile device number in the box below. Please be sure to include
    the country code (1 for the United States) before the area code. Example: 18885551234.
  </div>
</page>
```

**Figure 12-4. pageProperties.xml File**

### voyager.env

When Pcircjob2, Pcircjob3, Pcircjob5, or Pmediajob1 are run, they check the `voyager.env` file to determine if the SMS feature is to be used for sending circulation notices. To activate this feature, the `export` row needs to be uncommented and set to the correct server IP and port (see [Figure 12-5](#)) which is generally done at installation. The `voyager.env` file is located in `/ml/voyager/xxxdb/ini/`.

```
#####
## SMS messages configuration
## Uncomment the following line in order to send SMS (text/cellphone) messages
## for selected
## circulation notices. By uncommenting the line, you are informing the
## circulation and media
## jobs to attempt to send SMS notices using this URL. You may temporarily
## suspend sending
## SMS messages by commenting the line. See the circulation documentation for
## further
## configuration required to allow SMS messages to be sent.
#export SMSPROXY=http://<server IP>:7038/core-sms-proxy/sms
```

**Figure 12-5. voyager.env File**

### SmsProxyConf.xml

The `SmsProxyConf.xml` file is used to identify/configure the SMS gateway/service provider information. See [Figure 12-6](#). When you purchase credits from an SMS gateway/service provider, you receive credentials (user ID and password) that need to be entered into the `SmsProxyConf.xml` file.

The `SmsProxyConf.xml` file is configured with the SimpleWire and Clickatell provider information by default since the Ex Libris SMS proxy software provides the adapters for these providers. However, you may use other providers with the adapters that you have created for them. See [Ex Libris SMS Proxy](#) on [page 12-4](#), Ex Libris EL Commons, and the *SMS Proxy User's Guide* available in the Cross Product section of the Ex Libris Documentation Center (Cross\_Product\_Information\_Distributors > Cross\_Product\_Information\_Customers > SMS Proxy).

```
<Senders>
  <Sender>xx.xxx.x.xx</Sender>
</Senders>
<Institutions>
  <Institution name="Simplewire Demo Library" code="xxxdb">
    <ProviderCode>simplewire</ProviderCode>
    <ProviderUser>SMS_PROXY_OPENMARKET_USER</ProviderUser>
    <ProviderPassword>SMS_PROXY_OPENMARKET_PASSWORD</ProviderPassword>
  </Institution>
  <Institution name="Clickatell Demo Library" code="xxxdb">
    <ProviderCode>clickatell</ProviderCode>
    <ProviderUser>SMS_PROXY_CLICKATELL_USER</ProviderUser>
    <ProviderPassword>SMS_PROXY_CLICKATELL_PASSWORD</ProviderPassword>
  </Institution>
</Institutions>
<Providers>
  <Provider name="SimpleWire" code="simplewire">
    <component>com.exlibris.core.sms.proxy.SimpleWireProvider</component>
  </Provider>
  <Provider name="Clickatell" code="clickatell">
    <component>com.exlibris.core.sms.proxy.ClickatellProvider</component>
  </Provider>
</Providers>
</SmsProxyRoot>
```

---

**Figure 12-6. SmsProxyConf.xml File**

For each institution, you need to define:

- Institution name and code (Voyager System Administration database code/ xxxdb)
- Provider code
- User ID
- Password

One institution needs to be defined for each database (xxxdb).

Also defined in this configuration file is the sender and provider information. The sender information is the IP address of the server that sends the outgoing message. The provider component information is the fully qualified class name of



the Java class that implements the adapter for the vendor selected. The provider component is supplied by default for SimpleWire and Clickatell. If you create your own adapter, you need to provide this information.

The `SmsProxyConf.xml` file is located in `/ml/voyager/xxxdb/tomcat/smsproxy/context/core-sms-proxy/WEB-INF/classes/`.

### **Pcircjob/Pmediajob**

---

The following existing jobs, when run, trigger the SMS notices to be sent:

- circjob2
- circjob3
- circjob5
- mediajob1

The triggers that cause these jobs to send an SMS message to a patron are:

- SIF message type of circulation overdue, recall, item available, and/or media overdue notice
- Existence of the SMS Proxy URL in the `voyager.env` file
- Existence of the patron SMS number (mobile device number) in the patron table in the Voyager database (see [Patron SMS Number](#) on [page 12-9](#)).

All of these triggers need to exist for the SMS message to be sent.

Use WebAdmin to verify that the circulation and/or media jobs are running as scheduled. View the information provided in Circulation > Reports and Notices.

### **Patron SMS Number**

---

The patron's mobile device number may be entered in two ways:

- By adding or editing a patron record in the Circulation client (see [Figure 12-7](#))  
For instructions, see [Creating a Patron Record](#) on [page 4-19](#).
- Entered by patrons on the Patron Information page in WebVoyage (see [Figure 12-8](#))

**NOTE:**

Only one mobile number is permitted per patron regardless of where it is entered.

**Add New Patron Record**

Name	Details	Barcode	Address	Phone
<p>Last: <input type="text"/></p> <p>First: <input type="text"/></p> <p>Middle: <input type="text"/></p> <p>Title: <input type="text"/></p> <p>Name Type: <input type="text" value="Personal"/> ▼</p> <p>Institution Id: <input type="text"/></p> <p>SSN: <input type="text" value="___-__-__"/></p>				

Patron Record

<New Patron>

---

**Figure 12-7. Add New Patron**

## Personal Information

[My Account](#)[Edit Preferences](#)

**Name:** Sandy Smith

**Email:** [sandy.smith@abcinstitute.edu](mailto:sandy.smith@abcinstitute.edu)

**Permanent Address:** 532 N. 3rd St.

Watseka IL 60970

*If you would like to receive circulation notices from the library on your mobile device, enter your mobile device number in the field provided starting with the country code. Examples: 18885551234, 1-888-555-1234, or 1(888) 555-1234, +61 9 1234 1234 or 61912341234*

**SMS Number:**

Figure 12-8. Patron Information Page - Mobile Device Number

## SMS Send Status Log

To track the status of SMS messages that are sent, you need to configure the `sms-log4j.properties` file. See [Figure 12-10](#). The `sms-log4j.properties` file identifies the specific log file for logging the status.

The status logged includes:

- SMS proxy send status
- Provider receive status
- Patron ID

- Message type
- Patron SMS mobile device number

See [Figure 12-9](#) for an example.

```
2010-04-09 16:48:22,427 0 [main] INFO SMSLOG - Send SMS result for patron : 1000008
SMS number : 18005551234
Message Type : Circulation overdue notice
SMS Proxy Status: request accepted
SMS Provider Status: ID: 12912c01604d3c7aaa712372cd349dbf
Send date : 2010-03-04 13:04:50
```

---

**Figure 12-9. SMS Status Log Example**

Confirm that the correct path (using the your xxxdb) is identified for the  
`log4j.appender.LOGFILE.File=` option.

```
log4j.rootLogger=WARN, CONSOLE
log4j.appender.CONSOLE=org.apache.log4j.ConsoleAppender
log4j.appender.CONSOLE.encoding=UTF-8
log4j.appender.CONSOLE.layout=org.apache.log4j.PatternLayout
log4j.appender.CONSOLE.layout.ConversionPattern=%-4r [%t] %-5p %c %x - %m%n
log4j.logger.com.endinfosys=DEBUG, LOGFILE
#log4j.logger.com.endinfosys.web.util=DEBUG
#log4j.logger.com.endinfosys=FATAL
log4j.appender.LOGFILE=org.apache.log4j.DailyRollingFileAppender
log4j.appender.LOGFILE.File=/m1/voyager/xxxdb/tomcat/smsproxy/logs/sms.log
log4j.appender.LOGFILE.datePattern='.'yyyy-MM-dd
log4j.appender.LOGFILE.append=true
log4j.appender.LOGFILE.encoding=UTF-8
log4j.appender.LOGFILE.layout=org.apache.log4j.PatternLayout
log4j.appender.LOGFILE.layout.ConversionPattern=%d{ISO8601} %-4r [%t] %-5p %c %x - %m%n
```

---

**Figure 12-10. sms-log4j.properties File**

The `sms-log4j.properties` file is located in `/m1/voyager/xxxdb/ini/`.

### Overview

---

You can define circulation session default settings for:

- Alerts
- Printing
- Fines
- Fees
- Demerits
- Item creation
- E-item creation
- Item creation defaults
- Searching

Session preferences are options you may select as the defaults that run on your installation of the Voyager Circulation client. These options are controlled by check boxes and drop-down lists. Simply select or clear the check box or select your choice from the drop-down list to set your preference for each option. For the options with an underscored letter, you may use the keyboard shortcut (Alt + the underscored letter) to select or clear the option.

## Alerts, Printing, and Fines/Fees/Demerits

---

See [Figure 13-1](#) for an example of the Alerts, Printing and Fine/Fee/Demerit tab.

---

The screenshot shows the 'Session Preferences' dialog box with the 'Alerts, Printing and Fine/Fee/Demerit' tab selected. The dialog has two sub-tabs: 'Alerts, Printing and Fine/Fee/Demerit' and 'Items and Searching'. The 'Alerts' section contains two columns of checkboxes. The 'Printing' section has checkboxes for various slip types and a sub-section for 'Print Due Date Slip'. The 'Fine/Fee/Demerit' section has a checkbox for using the active circulation location as the default filter and a dropdown for 'Default for Post Against'.

Alerts, Printing and Fine/Fee/Demerit		Items and Searching
<b>Alerts</b>		
<input checked="" type="checkbox"/> Patron Fine Fee Alerts	<input checked="" type="checkbox"/> Patron Pop-up Note Alert Upon Display	
<input checked="" type="checkbox"/> Patron Available Item Alerts	<input checked="" type="checkbox"/> Patron Pop-up Note Alert Upon Discharge	
<input checked="" type="checkbox"/> Charge Note Alert	<input checked="" type="checkbox"/> Temporary Location Alert on Discharge	
<input checked="" type="checkbox"/> Discharge Note Alert	<input checked="" type="checkbox"/> Loan Shortened Due To Patron Expiration Alert	
<input checked="" type="checkbox"/> Enable default button selection	<input checked="" type="checkbox"/> Short Loan Advanced Booking Alert	
<b>Printing</b>		
<input type="checkbox"/> Print Fine Slips	<b>Print Due Date Slip</b>	
<input type="checkbox"/> Print Discharge Slips	<input checked="" type="radio"/> No Due Date Slip	
<input type="checkbox"/> Print Hold Slips	<input type="radio"/> Per Single Charge	
<input type="checkbox"/> Print Routing Slips	<input type="radio"/> All Charges in One Receipt	
<b>Fine/Fee/Demerit</b>		
<input type="checkbox"/> Use Active Circulation Location as the Default Fines/Fees Filter		
Default for Post Against: <span>Patron Total</span>		
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

**Figure 13-1. Alerts, Printing and Fine/Fee/Demerit Tab**

See [Table 13-1](#), [Table 13-2](#), and [Table 13-3](#) for a description of the options available on the Alerts, Printing and Fine/Fee/Demerit tab.

**Table 13-1. Alerts**

<b>Option</b>	<b>Description</b>
Patron Fine Fee Alerts	<p>Select this option to display a circulation alert if the patron has outstanding fines, fees, or demerits.</p> <p>This overrides the System Administration module configurations.</p>
Patron Available Item Alerts	<p>Select this option to display a circulation alert if the patron has requested items available.</p> <p>This overrides the System Administration module configurations.</p>
Charge Note Alert	<p>Select this option to display a note alert if one exists for the item being charged.</p> <p>For example, this might be used for a staff note to the circulation clerk like “Also give the patron the CD that is stored behind the desk that goes with this book.”</p>
Discharge Note Alert	<p>Select this option to display a note alert if one exists for the item being discharged.</p> <p>For example, this might be used for a staff note to the circulation clerk like “Confirm that there is a CD in the back pocket of this book.”</p>
Enable default button selection	<p>Select this option if you want to set the default focus on the command button (such as the Override, Supervisor, OK, or Cancel buttons) for all pop-up alerts and messages.</p> <p>If this option is not selected, the system will not place focus on any command buttons for pop-up alerts and messages.</p>
Patron Pop-up Note Alert Upon Display	<p>Select this option to have a patron pop-up note alert display when a patron record is opened.</p> <p>The default for this option is selected.</p>
Patron Pop-up Note Alert Upon Discharge	<p>Select this option to have a patron pop-up note alert display at discharge (when using the Discharge icon or Functions &gt; Discharge option to process items).</p> <p>The default for this option is selected.</p>

**Table 13-1. Alerts**

Option	Description
Temporary Location Alert	<p>Select this option to display a pop-up alert on discharge if the item is shelved in a temporary location. The alert message displays "Item has a temporary location."</p> <p>The default for this option is selected.</p>
Loan Shortened Due to Patron Expiration Alert	<p>Select this option to display an alert when an item is being charged and the loan period has been shortened due to the patron expiration date. (Voyager automatically shortens the loan period to match the expiration date if the expiration date is earlier than the end date of the loan period.)</p> <p>The default for this option is selected.</p>
Short Loan Advanced Booking Alert	<p>Select this option to display an alert when there are future bookings pending for the item being discharged.</p> <p>The message "Advanced short loans are pending for this item" displays and the list of the start/end times for pending bookings.</p> <p>The default for this option is not selected.</p> <p>Refer to the <i>Voyager System Administration User's Guide</i> for related information regarding the <b>Advanced Loan Warning Period</b> option.</p>



Table 13-2. Printing

Option	Description
Print Due Date Slip	<p>This section includes the following options for printing due date slips:</p> <ul style="list-style-type: none"> <li>• <b>No Due Date Slip</b> – Selecting this option indicates that the system will not print a slip that lists an item's due date when the item is charged.</li> <li>• <b>Per Single Charge</b> – Selecting this option indicates that the system will automatically print a slip that lists an item's due date when the item is charged.</li> <li>• <b>All Charges in One Receipt</b> – Selecting this option indicates that the system will display a Receipt button on the Charge workspace, which allows the staff user to print a slip that includes all charges in the list.</li> </ul>
Print Fine Slips	Selecting this option indicates that a slip should print when an item with fines attached to it is discharged.
Print Discharge Slips	Selecting this option indicates that a slip should print when an item is discharged.
Print Hold Slips	Selecting this option indicates that a slip should print when an item that has an active hold is discharged.
Print Routing Slips	Selecting this option indicates that a slip should print when an item from a location designated as a routing location (set in System Administration in a Cataloging Policy Group Definition) is discharged.

**Table 13-3. Fine/Fee/Demerits**

Option	Description
Use Active Circulation Location as the Default Fines/Fees Filter	Limits the display of fines, fees, and demerits to those assessed at the desk into which the operator is logged in.  When not selected, operators see all fines, fees, and demerits.  This option is not selected by default.
Default for Post Against	Select one of the following from the drop-down list to identify the default for Post Against on the Post Against Fine/Fee dialog box: <ul style="list-style-type: none"><li>• Selected</li><li>• Displayed</li><li>• Patron Total</li></ul> The default for this setting is Patron Total.

## Printing

---

You can set defaults for the printing preferences in System Administration. See the *Locations Tab* in the *Voyager System Administration User's Guide*.

You can customize the format by which you want any of the slips to print. You can change heading information, font sizes and other details. See [Printing Templates](#) on [page A-1](#) of this user's guide for more information regarding customizing print templates.

## Items and Searching Tab

See [Figure 13-2](#) for an example of the Items and Searching tab.

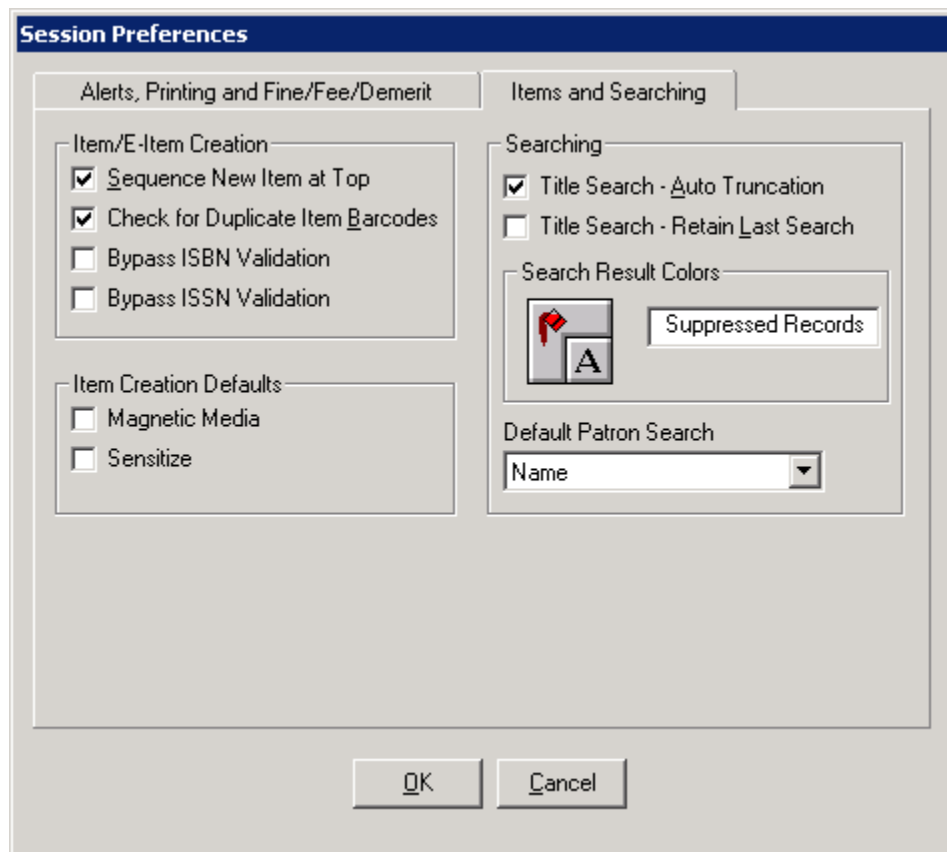



Figure 13-2. Items and Searching Tab

See [Table 13-4](#), [Table 13-5](#), and [Table 13-6](#) for a description of the options available on the Items and Searching tab.

**Table 13-4. Item/E-Item Creation**

Option	Description
Sequence New Item at Top	<p>Sequences newly-created items and e-items at the beginning or end of the item list in an Item Record.</p> <p>The system retains this preference from Circulation session to session based upon your operator ID.</p>
Check for Duplicate Item Barcodes	<p>When an item barcode is being created or edited, Voyager tests for the existence of duplicate barcodes in the database.</p> <p>If the barcode you are attempting to attach to an item is already in use elsewhere, a message displays asking if the barcode should be used anyway.</p> <p>The default is for this option to be selected and the check is made for duplicate barcodes.</p> <p> <b>IMPORTANT:</b> <i>You may clear the preference to avoid the check for duplicate barcodes, but it only remains cleared for the current circulation session. It reverts back to the default after you log out of the Circulation client.</i></p>
Bypass ISBN Validation	<p>Select this option to prevent the validation of the following fields when a bibliographic record is saved to the database:</p> <ul style="list-style-type: none"><li>• 020\$a</li><li>• 024\$a with first indicator of 3</li></ul> <p>If this option is not selected, validation occurs to insure compliance with the ISBN format.</p>
Bypass ISSN Validation	<p>Select this option to prevent the validation of the 022\$a when a bibliographic record is saved to the database.</p> <p>If this option is not selected, validation occurs to insure compliance with the ISSN format.</p>

**Table 13-5. Item Creation Defaults**

Option	Description
Magnetic Media	<p>Select this option to identify it as the default on the Item tab of the Add Bib/Item dialog box when creating item records.</p> <p>The default preference for this option is not selected.</p>
Sensitize	<p>Select this option to identify it as the default on the Item tab of the Add Bib/Item dialog box when creating item records.</p> <p>The default preference for this option is not selected.</p>

**Table 13-6. Searching**

Option	Description
Title Search - Auto Truncation	<p>Automatically truncates the text that you enter into the Search dialog box.</p> <p>The system retains this preference from Circulation session to session based upon your operator ID.</p>
Title Search - Retain Last Search	<p>Select this check box to save the last search each operator performs in the Search dialog box. The system saves your last search until you exit the current Circulation session.</p> <p>The system retains this preference selection from Circulation session to session based upon your operator ID.</p> <p>This field overrides the Default Tab and Save Settings buttons on the Search dialog box. Therefore, you must clear the Retain Last Search checkbox in order to utilize the Default Tab and Save Settings functions. See <a href="#">Table 3-2</a> on <a href="#">page 3-17</a>, <a href="#">Table 3-3</a> on <a href="#">page 3-21</a>, and <a href="#">Table 3-4</a> on <a href="#">page 3-28</a> for more information.</p>

**Table 13-6. Searching**

Option	Description
Search Result Colors	<p>Specifies a text and background color to apply to titles that display in bibliographic search results to indicate that the record is suppressed in the OPAC.</p> <p>To apply a different background color, select the top left area of the button.</p> <p>To apply a different text color, select the bottom right area of the button.</p> <p>Search results are highlighted with the preference colors selected when a bibliographic or MFHD record is suppressed (including times when the bibliographic record is not suppressed but the MFHD record is suppressed). This applies to Find and Browse searches on the Index Selection tab of the Search dialog box and includes call number browse searches.</p> <p><b>NOTE:</b> The Suppressed Records field displays the current text and background colors of suppressed records and dynamically updates to reflect any changes that you make.</p>
Default Patron Search	<p>Select one of the following from the drop-down list to identify the default type of Search By criteria on the Patron Search dialog box:</p> <ul style="list-style-type: none"><li>• Name</li><li>• Barcode</li><li>• Patron ID</li><li>• Institution ID</li></ul> <p>The default for this setting is Name.</p>

## **Introduction**

---

There are a variety of Circulation menus and submenus accessible to operators allowing them access to the functions in the Circulation module.

## **Purpose of This Chapter**

---

This chapter discusses the following options and menus:

- Keyboard Equivalents
  - Selecting Options
  - Entering Information
- Circulation Windows Functions
- Circulation Editing Functions
- Circulation Main Menu
- Charge/Renew Menu
- Discharge Menu
- Reserve Menu
- Patron Menu
- Item Menu

## Keyboard Equivalents For Selecting Options

---

Many commands and menu selections have corresponding keyboard equivalents. For example, fines may be collected from the Discharge workspace by using either of the following keyboard sequences:

- **Alt + d, f** — hold down the **Alt** key and press the **d** key, release both keys, and then press the **f** key.
- **Ctrl + F** — hold down the **Ctrl** key and press the **f** key and then release both keys.

### NOTE:

The keyboard shortcuts for the submenu items are indicated by the underlined letter.

## Keyboard Equivalents for Entering Information

---

Use the **Tab** key to move through the dialog box fields. Press the **F4** (or **F8** in some instances) function key to display the drop-down arrow selections. This also activates the ellipses buttons (if the criteria you selected in the fields results in an ellipses button). Use your keyboard arrows to move through a list of options.

To tab in the reverse direction, press Shift+ the tab key (you can use this method to get back to the option buttons as well). Use the up and down arrow to select an option button. When search results are displayed, use the arrow keys to move through the list options. Use your space bar to select the option if the results display in a list box with a header.

## Circulation Windows Functions

---

The Circulation Windows functions are the standard features in a Windows application and display under **Window** in the main menu of each Voyager Circulation activity.

**Arrange Windows** allows you to cascade any open windows

**Arrange Icons** allows you to arrange the icons so that they do not overlap each other.



## Circulation Editing Functions

The Circulation editing functions include: Undo, Cut, Copy, Paste, and Delete. These editing features allow you to transfer, replace, or remove information throughout the Circulation module. However, depending on where you are in the Circulation module, these functions may be utilized by either right-clicking and displaying the editing submenu or by their shortcut commands, listed in [Table 14-1](#).

**Table 14-1. Editing Shortcut Commands**

Function	Description
Undo (Ctrl + z)	Allows you to undo the last editing activity performed.
Cut (Ctrl + x)	Allows you to remove any selected information. The cut information is temporarily placed on the PC's clipboard.
Copy (Ctrl + c)	Allows you to repeat any selected information in another location. The copied information is temporarily placed on the PC's clipboard.
Paste (Ctrl + v)	Allows you to place your cursor and click a new location to place any cut or copied information.
Delete (Delete key)	Allows you to permanently remove any selected information.

## Circulation Main Menu

The menu items: **File**, **Functions**, **Options**, and **Help** display on the Voyager Circulation menu bar (see [Figure 14-1](#)).



**Figure 14-1. Circulation Menu Bar and List Bar**

An additional menu displays on the menu bar for each function as it is activated. For example, the Patron menu is available when a patron record is open.

The keyboard shortcuts for the options are displayed with an underlined letter. Click **Alt +** (menu letter) + the underlined letter of the command. For example, if you wanted to access Session Options using the keyboard shortcut, press **Alt + o**. Some of the menu commands can also be accessed by a right-click to display the submenu.

## **File Menu (Alt + f)**

---

The file menu contains:

### **Login Information (Alt + f, l)**

Displays the current operator name, operator ID, and the circulation login location.

### **Print Setup (Alt + f, p)**

Displays the Print dialog box to change printers and printer properties.

### **Change Password (Alt + f, w)**

Displays the dialog box for changing your password.

For information on how to configure password requirements, see [Configuring Password Options](#) in the *Voyager System Administration Guide*.

### **Close (Alt + f, c)**

Closes the active Circulation dialog box. Displays on the File menu when at least one Circulation function is active.

### **Close All (Alt + f, a)**

Closes all open Circulation dialog boxes. Displays on the File menu when at least one Circulation function is active.

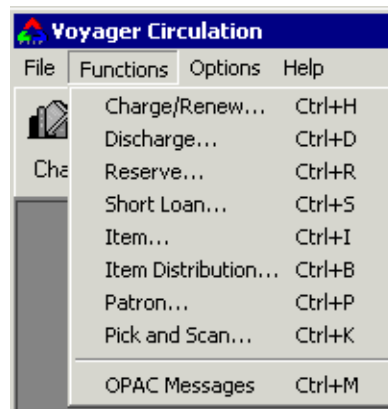
### **Exit (Alt + f, x)**

Ends the current session and closes the Circulation dialog box.

## **Functions Menu (Alt + u)**

---

[Figure 14-2](#) displays the Functions menu.



**Figure 14-2. Functions Menu**

**Charge/Renew (**Ctrl + H** or **Alt + u, h**)**

Opens the Charge dialog box so that you can charge and renew items.

**Discharge (**Ctrl + D** or **Alt + u, d**)**

Opens the Discharge dialog box so that you can discharge items.

**Reserve (**Ctrl + R** or **Alt + u, r**)**

Opens the Reserve List Search dialog box so you can create new reserve lists or update existing reserve lists.

**Short Loan (**Ctrl + S** or **Alt + u, s**)**

Opens the Short Loan Search List dialog box so that you can manage your short loan requests.

**Item (**Ctrl + I** or **Alt + u, i**)**

Opens the Item Record dialog box so that you can create and maintain your item records.

**Item Distribution (**Ctrl + B** or **Alt + u, b**)**

Open the Item Distribution dialog box so you can create and distribute items and maintain the item's inventory.

**Patron (**Ctrl + P** or **Alt + u, p**)**

Opens the Patron Record dialog box so that you can create and maintain your patron records.

### Pick and Scan (**Ctrl + K**)

Opens the Pick and Scan dialog box for modifying a group of records. Refer to the *Pick and Scan* chapter in the *Voyager Cataloging User's Guide* for a complete description of these options.

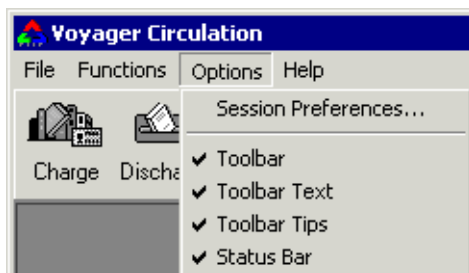
### OPAC Messages (**Ctrl + M**)

Opens the OPAC Call Slip Messages dialog box for invoking call slip request messages.

## Options Menu (**Alt + o**)

---

[Figure 14-3](#) displays the Options menu.



---

**Figure 14-3. Options Menu**

### Session Preferences (**Alt + o, p**)

Opens the options you can set for your current session.

### Toolbar (**Alt + o, t**)

Opens the Circulation buttons under the menu bar. A check mark indicates the option is selected.

### Toolbar Text (**Alt + o, x**)

Opens the button name directly beneath the button on the Circulation toolbar. A check mark indicates the option is selected.

### Toolbar Tips (**Alt + o, p**)

Opens the button name when you point to a button on the Circulation toolbar. A check mark indicates the option is selected.

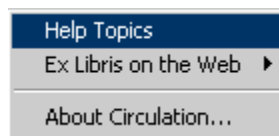
### Status Bar (**Alt + o, s**)

Opens the status bar (the area at the bottom of Circulation dialog boxes that displays your session status). A check mark indicates the option is selected.

### Help Menu (Alt + h)

---

[Figure 14-4](#) displays the Help menu.



**Figure 14-4. Help menu**

See [Table 14-2](#) for a description of the Help menu options.

**Table 14-2. Help Menu**

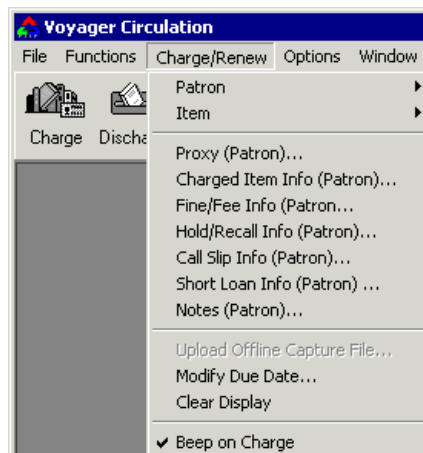
Menu Item	Description
Help Topics (Alt + h, h)	Opens the Circulation Help contents window.
Ex Libris on the Web (Alt + h, e)	Provides links to Ex Libris Web content.
About Circulation (Alt + h, a)	Opens the copyright notice and version number of your copy of Voyager Circulation.

## Charge/Renew Menu (Alt + c)

---

[Figure 14-5](#) displays the Charge/Renew menu.

---



---

**Figure 14-5. Charge/Renew Menu**

### Patron (Alt + c, p)

- Search for Patron (Alt + c, p, s) — Opens the Patron Search dialog box to search for a patron barcode.
- Paste Barcode (Ctrl + T or Alt + c, p, t) — Pastes the last stored value on the clipboard into the Patron Barcode field of the Charge workspace.
- Add New Patron (Alt + c, p, a) — Opens the Add a New Patron dialog box to create a new patron record.
- Clear Display (Alt + c, p, c) — Clears the fields on the Charge workspace.

### Item (Alt + c, i)

- Item Headings/Keyword Search (Alt + c, i, s) — Opens the Search dialog box to search for an item barcode.
- Paste Barcode (Ctrl + A or Alt + c, i, t) — Pastes the last stored value on the clipboard into the Item Barcode field of the Charge workspace.
- Add New Item (Alt + c, i, a) — Opens the Add Bib/Item dialog box to create a new bibliographic, holdings, and item record and an item and save it to the database.

**Proxy (Patron) (Alt + c, x)**

Opens the name, barcode, and group of the patron(s) to whom the charging patron is a proxy.

**Charged Item Info (Patron) (Alt + c, g)**

Opens the Charged Item Index for the current patron.

**Fine/Fee Info (Patron) (Alt + c, f)**

Opens the fines and fees for the current patron.

**Hold/Recall Info (Patron) (Alt + c, h)**

Opens any pending or available holds and recalls for the current patron.

**Call Slip Info (Patron) (Alt + c, a)**

Opens any call slip information for the current patron.

**Short Loan Info (Patron) (Alt + c, s)**

Opens any pending or available short loans for the current patron.

**Notes (Patron) (Alt + c, n)**

Opens any notes attached to the patron record.

**Upload Offline Capture File (Alt + c, u)**

Processes the temporary charge file and adds its contents to the database.

**Modify Due Date (Alt + c, m)**

Allows you to modify the charged item's due date and time.

**Clear Display (Alt + c, c)**

Clears the Charge dialog box of all information.

**Beep on Charge (Alt + c, b)**

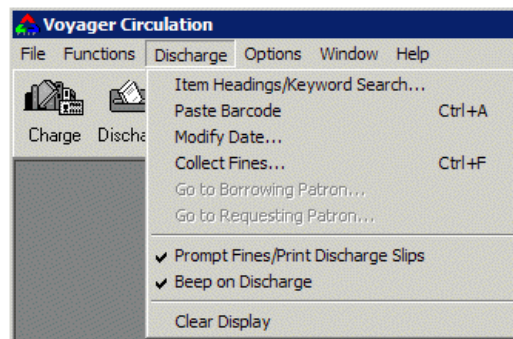
The system beeps when an item is charged. A check mark indicates the option is selected.

## Discharge Menu (Alt + d)

---

[Figure 14-6](#) displays the Discharge menu.

---



---

**Figure 14-6. Discharge Menu**

### Item Headings/Keyword Search (**Alt + d, s**)

Opens the Search dialog box to search for an item barcode.

### Paste Barcode (**Ctrl + A** or **Alt + d, a**)

Pastes the last stored value on the clipboard into the Item Barcode field of the Discharge dialog box.

### Modify Date (**Alt + d, m**)

Opens the Backdate Discharge Time To... dialog box to modify an item's discharge date and time.

### Collect Fines (**Ctrl + F** or **Alt + d, f**)

Opens the current patron's fines and fees.

### Go to Borrowing Patron... (**Alt + d, b**)

Opens the borrowing patron's record at discharge.

### Go to Requesting Patron... (**Alt + d, r**)

Opens the requesting patron's record at discharge.

### Prompt Fines/Print Discharge Slips (**Alt + d, p**)

Automatically displays the current patron's fines and fees and prints a discharge slip. A check mark indicates the option is selected.



BEEP on Discharge (**Alt + d, b**)

The system beeps when an item is discharged. A check mark indicates the option is selected.

**Clear Display (**Alt + d, c**)**

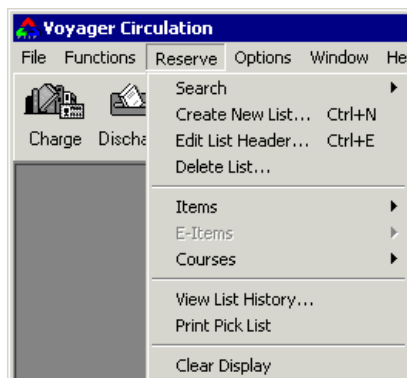
Clears the Discharge dialog box of all information.

**Reserve Menu (**Alt + r**)**

---

[Figure 14-7](#) displays the Reserve menu.

---



---

**Figure 14-7. Reserve Menu**

**Search (**Alt + r, s**)**

- For Item (**Ctrl + F** or **Alt + r, s, i**) — Opens the Search dialog box to search for an item.
- For List (**Alt + r, s, l**) — Opens the Reserve List Search dialog box to search for a reserve list.
- Display Headings Index (**Alt + r, s, h**) — Displays the results of the last headings search performed. If a search of this type has not been performed, the command is grayed out.
- Display Keyword Index (**Alt + r, s, k**) — Displays the results of the last keyword search performed. If a search of this type has not been performed, the command is grayed out.
- Display Title Index (**Alt + r, s, p**) — Displays the results of the last keyword search performed. If a search of this type has not been performed, the command is dimmed.
- Display Item Index (**Alt + r, s, d**) — Displays the results of the last keyword search performed. If a search of this type has not been performed, the command is grayed out.

**Create New List... (Ctrl + N or Alt + r, n)**

Opens the Create New Reserve List dialog box to create a new reserve list.

**Edit List Header... (Ctrl + E or Alt + r, e)**

Opens the Edit Reserve List Header dialog box to edit the displayed reserve list header.

**Delete List (Alt + r, d)**

Deletes a reserve list. If the current operator does not have the authority to delete a reserve list, this command is grayed out.

**Items (Alt + r, i)**

- **Add By Barcode... (Alt + r, i, a)** — Opens the Search By Item Barcode dialog box to search for and add an item to a reserve list by barcode.
- **Add By Headings/Keyword... (Alt + r, i, d)** — Opens the Search dialog box to search for and add an item to a reserve list by headings and keywords.
- **Remove (Ctrl + M or Alt + r, i, m)** — Removes the selected item from a reserve list.
- **Display Headings Index (Alt + r, i, h)** — Displays the results of the last headings search performed. If a search of this type has not been performed, the command is grayed out.
- **Display Keyword Index (Alt + r, i, k)** — Displays the results of the last keyword search performed. If a search of this type has not been performed, the command is grayed out.
- **Display Item Index (Alt + r, i, i)** — Displays the results of the last item search performed. If a search of this type has not been performed, the command is grayed out.
- **Create and Add Bib/Item (Alt + r, i, r)** — Opens the Add Bib/Item dialog box to create an item on-the-fly.
- **Copy Items from Another List (Ctrl + Y or Alt + r, i, y)** — Opens the Reserve List Search dialog box to search for and copy items from one reserve list to another.
- **Change Item Types (Alt + r, i, t)** — Changes the reserve item type of the selected reserve item.
- **Change Location (Alt + r, i, l)** — Changes the reserve location of a selected reserve item.
- **Charged To... (Alt + r, i, c)** — Opens the Charged To dialog box indicating the patron who has checked out the reserve item.
- **On Reserve (Alt + r, i, o)** — Switches the selected reserve list item(s) on reserve.

- Off Reserve (**Alt + r, i, a**) — Switches the selected reserve list item(s) off reserve.

**E-Items (Alt + r, t)** (available when the E-Item tab is selected)

- Add New E-Item, Holding and Bib Record (**Alt + r, t, b**) — Creates a new bibliographic, holdings, and e-item record and adds it to a reserve list.
- Add New E-Item/Holding to Bib Record (**Alt + r, t, h**) — Creates a new holdings and e-item record linked to an existing bibliographic record and adds it to the reserve list.
- Add New E-Item to Bib / Holding Record (**Alt + r, t, n**) — Creates a new e-item record linked to existing bibliographic and holdings records and adds it to the reserve list.
- Add E-Item By ID Number (**Alt + r, t, a**) — Adds an existing e-item to a reserve list.
- Edit E-Item (**Alt + r, t, e**) — Displays an e-item record for editing.
- Remove E-Item from List (**Alt + r, t, r**) — Removes an e-item from a reserve list.
- Delete E-Item (**Alt + r, t, d**) — Deletes an e-item from the database.

**Courses (Alt + r, o)**

- Link Courses (**Ctrl + L** or **Alt + r, o, l**) — Links reserve lists to courses by department, course, instructor, or section.
- Unlink Courses (**Ctrl + U** or **Alt + r, o, u**) — Unlinks reserve lists from courses.

**View List History (Alt + r, v)**

Opens the Reserve List History dialog box to view who created and updated the reserve list and where it was updated.

**Print Pick List (Alt + r, p)**

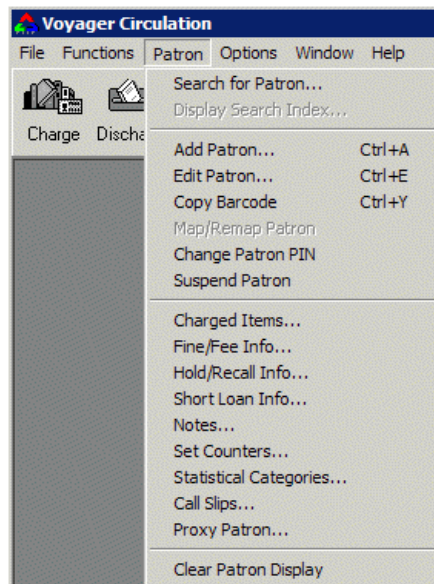
Prints the reserve list for retrieval of reserve list items.

**Clear Display (Alt + r, c)**

Clears the Reserve List dialog box of all information.

## Patron Menu (Alt + p)

[Figure 14-8](#) displays the Patron menu.



**Figure 14-8. Patron Menu**

### Search for Patron (**Alt + p, s**)

Opens the Patron Search dialog box to search for a patron by name, social security number, barcode or institution ID.

### Display Search Index (**Alt + p, d**)

Displays the results of the last patron search performed. If a search of this type has not been performed, the command is grayed out.

### Add Patron (**Ctrl + A** or **Alt + p, a**)

Opens the Add New Patron Record dialog box to create and save a new patron record.

### Edit Patron (**Ctrl + E** or **Alt + p, e**)

Opens the Edit Patron Record dialog box for editing an existing patron record.

**Copy Barcode (Ctrl + Y or Alt + p, y)**

Copies the barcode from the selected record on the Patron Record dialog box and places it on the clipboard.

**Change Patron Pin (Alt + p, p)**

Opens the Change Patron Pin dialog box for editing a patron's PIN.

**Suspend Patron (Alt + p, u)**

Opens the Suspend Patron dialog box to suspend a Patron's account.

**Charged Items... (Alt + p, c)**

Opens the charged item index for a patron.

**Fine/Fee Info... (Alt + p, f)**

Displays a patron's outstanding and historical fines and fees.

**Hold/Recall Info... (Alt + p, h)**

Displays a patron's pending and available hold and recall requests.

**Short Loan Info... (Alt + p, r)**

Displays a patron's pending and available short loan requests.

**Notes... (Alt + p, n)**

Displays a patron's notes for viewing or editing.

**Set Counters (Alt + p, u)**

Opens the Set Patron Counters dialog box to manually edit a patron's statistical counters.

**Statistical Categories (Alt + p, t)**

Opens the Patron Statistical Categories dialog box to add or remove statistical categories from a patron record.

**Call Slips... (Alt + p, l)**

Opens a patron's call slip requests.

**Proxy Patron... (Alt + p, x)**

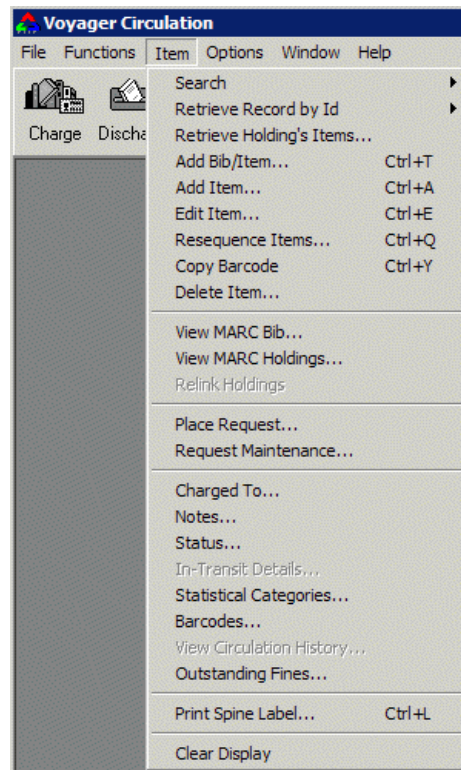
Opens the Proxy Patron Maintenance dialog box for adding or removing proxy patrons.

**Clear Patron Display (**Alt + p, c**)**

Clears the Patron Record dialog box of all information.

**Item Menu (**Alt + i**)**

[Figure 14-9](#) displays the Item menu.



**Figure 14-9. Item Menu**

**Search (**Alt + i, s**)**

- **Headings/Keyword (**Shift + F1** or **Alt + i, s, h**)** — Opens the Search dialog box to search for an item by headings/keyword.
- **Barcode (**Shift + F2** or **Alt + i, s, b**)** — Opens the Search by Item Barcode dialog box to search for an item record by barcode.
- **Display Headings Index (**Shift + F6** or **Alt + i, s, d**)** — Displays the results of the last headings search performed. If a search of this type has not been performed, the command is grayed out.

- Display Keyword Index (**Ctrl + F7** or **Alt + i, s, k**) — Displays the results of the last keyword search performed. If a search of this type has not been performed, the command is grayed out.
- Display Barcode Index (**Shift + F8** or **Alt + i, s, i**) — Displays the results of the last barcode search performed. If a search of this type has not been performed, the command is grayed out.

Retrieve Record by ID (**Alt + i, o**)

- Bib ID (**Alt + i, o, b**) — Retrieves an item record by the ID number of the bibliographic record.
- Item ID (**Alt + i, o, i**) — Retrieves an item record by the ID number of the item record.

Retrieve Holding's Items... (**Alt + i, r**)

Displays the holdings record for the open item record.

Add Bib/Item... (**Ctrl + T** or **Alt + i, i**)

Displays the Add Bib/Item template to create new bibliographic, holdings, and item record for an item.

Add Item... (**Ctrl + A** or **Alt + i, a**)

Opens the Item Editor dialog box to create a new item record for an existing item.

Edit Item... (**Ctrl + E** or **Alt + i, e**)

Opens the Item Editor dialog box to edit item record information.

Resequence Items... (**Ctrl + Q** or **Alt + i, q**)

Opens the Resequence Item dialog box. You can change the order of item records linked to the same holdings record to reflect whatever order you prefer.

Copy Barcode (**Ctrl + Y** or **Alt + i, y**)

Copies the barcode from the selected record on the Item Record dialog box and places it on the clipboard.

Delete Item... (**Alt + i, d**)

Deletes an item record. If the current operator does not have the authority to delete item records, the command is grayed out.



**View MARC Bib... (Alt + i, v)**

Displays the MARC record of the item's bibliographic record. This is a view-only display.

**View MARC Holdings... (Alt + i, h)**

Displays the MARC record of the item's holdings record. This is a view-only display.

**Relink Holdings (Alt + i, k)**

Links an item record to a different holdings record.

**Place Request... (Alt + i, p)**

Opens the Place Request dialog box to place a hold or recall on or submit a call slip for an item.

**Request Maintenance... (Alt + i, m)**

For regular items, Opens the Hold/Recall Maintenance dialog box to maintain the item's holds and recalls, For short loan items, Opens the Short Loan Maintenance dialog box to maintain the item's short loan requests.

**Charged To (Alt + i, t)**

Opens the Charged To dialog box listing the patron to whom the item is currently charged.

**Notes (Alt + i, n)**

Displays the item's notes for viewing or editing.

**Status (Alt + i, u)**

Displays the item's current status.

**Statistical Categories (Alt + i, g)**

Opens the Item Statistical Categories dialog box to add or remove statistical categories from an item record

**Barcodes (Alt + i, b)**

Opens the Item Barcodes dialog box to add, edit, or delete an item record barcode.

**View Circulation History... (Alt + i, w)**

Displays a list of all of the patrons that have checked the item out. This only displays if the option to retain patron identification has been selected in System Administration.

Outstanding Fines (**Alt + i, f**)

Displays any outstanding fines that a patron(s) has incurred while the item was charged to them.

Print Spine Label... (**Alt + i, l**)

Opens the Print Labels dialog box to print spine or piece labels.

Clear Display (**Alt + i, c**)

Clears the Item Record dialog box of all information.

---

## Printing Templates



---

### Introduction

The Voyager Circulation Module allows you to change the appearance of various slips and reports that are printed in the Circulation module.

The `circ.ini` file contains the stanzas that define these slips and reports.

You can define custom templates for Due Date Slips, Discharge Slips, Hold Slips, Routing Slips, and Fine/Fee Payment Receipts.

You can customize some fields for the Patron Fine/Fee Statements, Patron Charged Item Statements, Patron Request Statements, Item Circulation History Listings, Course Reserve Pick Lists, and MARC Records from item maintenance reports.

**NOTE:**

All slips print using the Latin-1 character set

---

### Customization Information

For the slips and reports discussed in this chapter, the individual stanzas governing the slip or report format do contain much of the same variables. For example, each stanza contains a `PatronLabel=` variable.

However, a distinction is made between those slips that print due to an action taking place in the system and those reports that print because the operator clicks the **Print** button in the module, and this distinction impacts how customizable the slip or report is.

The slips that print due to an action occurring in the system are as follows:

- Due Date Slips
- Discharge Slips
- Hold Slip
- Routing Slip
- Fine/Fee Payment Receipt Slip

For these slips that print automatically, the the following print options are included in their stanzas:

- BarcodeFontName=
- BarcodeFont Size=
- StartStopChar=
- PrintStartStopChar=

The reports that occur due to the operator clicking the **Print** button are:

- Fine/Fees Statement
- Patron Charged Items
- Patron Requests
- Patron Call Slips
- Circulation History
- Reserve Pick List
- MARC Record
- Short Loan Info
- Short Loan Search
- Item Distribution

In this case, that data that is displayed on the screen in tabular format, and the printed report follows that tabular format. In these situations, for example, while you can decide to print the patron's barcode, you are unable to control its formatting.

For all slips and reports, the stanzas in the `circ.ini` can be edited to change details such as page margins, font styles/sizes, captions, heading justification, column margins, text margins, and flags to indicate what patron information should be printed (flags are the `PrintPatronName=`, `PrintPatronBarcode=`, and `PrintPatronGroup=` yes/no value variables).

**NOTE:**

When editing the `.ini` files, you may change any information to the right of the equals sign. However, do not change any of the text to the left of the equals sign or delete any lines or stanzas. This will cause Voyager to not work properly and may cause the system to fail.

For example, in the following line:

```
HeadingFontName=TimesNewRoman
```

Operators may change the `TimesNewRoman` portion but not the `HeadingFontName` portion.

Operators can change printer settings in the **Print Setup** dialog box on the **File** menu.

## **CIRC.INI**

---

The `circ.ini` file contains the templates for all of the different slips and statements that can be printed in the Circulation module. The `circ.ini` file is located in the `c:\Voyager\Circulation` directory.

Each stanza of the `circ.ini` file defines the print template for a different slip. Certain types of information are common to most of the stanzas, but each stanza has its own requirements.

## Due Date Slip Stanza

---

The first stanza in the `circ.ini` file is the `[DUE DATE SLIP]` stanza. This defines the default settings for due date slips when the **Per Single Charge** option is selected in Session Preferences (see [Alerts, Printing, and Fines/Fees/Demerits](#) on [page 13-2](#)). A sample of this stanza displays in [Figure A-1](#).

```
[DUE DATE SLIP]
Heading=ITEM CHARGED
PatronLabel=Patron:
PatronBarcodeLabel=Patron Barcode:
PatronGroupLabel=Patron Group:
DueDateLabel=Due Date:
TitleLabel=Title:
AuthorLabel=Author:
CallNumberLabel=Call Number:
EnumerationLabel=Enumeration:
ChronologyLabel=Chronology:
CopyNumberLabel=Copy:
ItemBarcodeLabel=Item Barcode:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
MsgFontName=Times New Roman
MsgFontSize=12
MsgFontBold=False
MsgFontItalic=True
MsgFontUnderline=False
TextLeftMargin=3
PageMargins=1
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
BarcodeFontName=Barcode 3 of 9
BarcodeFontSize=12
StartStopChar=*
PrintStartStopChar=Y
Message=This patron has permission to remove this item from the library
```

**Figure A-1.** Example of the Due Date Slip Stanza

Due date slips will follow this format unless the patron group has a customized due date slip. See [Due Dates Slips for Specific Patron Groups](#) on [page A-7](#).

[Table A-1](#) describes the [DUE DATE SLIP] stanza.

**Table A-1. Due Date Slip Stanza Options**

Variable	Options
Heading=	Can be any text.
PatronLabel=	Can be any text
PatronBarcodeLabel=	Can be any text.
PatronGroupLabel=	Can be any text.
DueDateLabel=	Can be any text.
TitleLabel=	Can be any text.
AuthorLabel=	Cn be any text.
CallNumberLabel=	Can be any text.
EnumerationLabel=	Can be any text.
ChronologyLabel=	Can be any text.
CopyNumberLabel=	Can be any text.
ItemBarcodeLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	Must be a font name as it appears in your system's Fonts folder.
LabelFontSize=	Numeric size, in points.
LabelFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
LabelFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.

**Table A-1. Due Date Slip Stanza Options**

LabelFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
TextFontName=	Must be a font name as it appears in your system's Fonts folder.
TextFontSize=	Numeric size, in points.
TextFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
TextFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
TextFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
MsgFontName=	Must be a font name as it appears in your system's Fonts folder.
MsgFontSize=	Numeric size, in points.
MsgFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
MsgFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
MsgFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
TextLeftMargin=	Enter (in inches) the left margin for the text.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the patron's name, or N to not print the name.
PrintPatronBarcode=	Enter Y to print the patron's barcode, or N to not print the barcode.
PrintPatronGroup=	Enter Y to print the patron's Patron Group, or N to not print the Patron Group.
BarcodeFontName=	Barcode 3 of 9.
BarcodeFontSize=	12.



**Table A-1. Due Date Slip Stanza Options**

StartStopChar=	<p>* (or another user-defined symbol, such as ?) used to define the beginning and end of the barcode when it is printed on a slip.</p> <p>This is used in conjunction with the PrintStartStopChar= variable.</p>
PrintStartStopChar=	<p><b>Y</b> or <b>N</b> flag that instructs the system to print or not print the StartStopChar=.</p> <p>If <b>Y</b>, then the barcode is printed between the defined StartStopChar=.</p> <p>For example, if the StartStopChar=*, and the barcode is 123, then *123* would print as the barcode on the slip.</p> <p>If <b>N</b>, then using the values above, when printing the barcode on the slip it will simply read: 123.</p>
Message=	Enter a message that will be printed at the end of the due date slip.

### Due Dates Slips for Specific Patron Groups

The next stanzas are the Due Date Slip stanzas that are defined for each Patron Group. This defines the settings for Due Date slips printed for people from that particular patron group.

The name of the stanza depends on the patron group code. The stanza name follows the form DUE DATE SLIP- and is followed by the patron group code. If the patron group code for faculty is FAC, then the name of the stanza for faculty would be [DUE DATE SLIP-FAC]. The options available for these Due Date Slips are identical to the options available for standard Due Date Slips.

### Due Date Slip Session Stanza

The [DUE DATE SLIP SESSION] stanza defines the default settings for due date slips when the **All Charges in One Receipt** option is selected in Session Preferences (see [Alerts, Printing, and Fines/Fees/Demerits](#) on [page 13-2](#)). When the slip is printed, the details are listed for each item listed in the Charge Workspace.

The parameters for this stanza are identical to the parameters in the [DUE DATE SLIP] stanza. For more information, see [Table A-1](#) on [page A-5](#). A sample of this stanza displays in [Figure A-2](#).

```
[DUE DATE SLIP SESSION]
Heading=ITEM CHARGED
PatronLabel=Patron:
PatronBarcodeLabel=Patron Barcode:
PatronGroupLabel=Patron Group:
DueDateLabel=Due Date:
TitleLabel=Title:
AuthorLabel=Author:
CallNumberLabel=Call Number:
EnumerationLabel=Enumeration:
ChronologyLabel=Chronology:
CopyNumberLabel=Copy:
ItemBarcodeLabel=Item Barcode:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
MsgFontName=Times New Roman
MsgFontSize=14
MsgFontBold=False
MsgFontItalic=True
MsgFontUnderline=False
TextLeftMargin=3
PageMargins=1
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
BarcodeFontName=Barcode 3 of 9
BarcodeFontSize=12
StartStopChar=*
PrintStartStopChar=Y
Message=This patron has permission to remove these items from the library
```

---

**Figure A-2. Example of the Due Date Slip Session Stanza**

## Discharge Slip Stanza

The [DISCHARGE SLIP] stanza defines the style of the discharge slips. A sample of this stanza appears in [Figure A-3](#).

```
[DISCHARGE SLIP]
Heading=ITEM DISCHARGED
TitleLabel=Title:
AuthorLabel=Author:
CallNumberLabel=Call Number:
EnumerationLabel=Enumeration:
ChronologyLabel=Chronology:
CopyNumberLabel=Copy:
ItemBarcodeLabel=Item Barcode:
PatronLabel=Patron:
DueDateLabel=Due Date:
DischargeDateLabel=Discharged:
OverdueFineLabel=Overdue Fine:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
PageMargins=1
BlankLinesBetweenSections=2
PrintPatronName=Y
BarcodeFontName=Barcode 3 of 9
BarcodeFontSize=12
StartStopChar="
PrintStartStopChar=Y
```

**Figure A-3. Example of the Discharge Slip Stanza**

[Table A-2](#) describes the [DISCHARGE SLIP] stanza.

**Table A-2. Discharge Slip Stanza Options**

Variable	Options
Heading=	Can be any text.
TitleLabel=	Can be any text.
AuthorLabel=	Can be any text.
CallNumberLabel=	Can be any text.
EnumerationLabel=	Can be any text.
ChronologyLabel=	Can be any text.
CopyNumberLabel=	Can be any text.

**Table A-2. Discharge Slip Stanza Options**

ItemBarcodeLabel=	Can be any text.
PatronLabel=	Can be any text.
DueDateLabel=	Can be any text.
DischargeDateLabel=	Can be any text.
OverdueFineLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic.
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the left margin for the text.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the patron's name, or N to not print the name.

**Table A-2. Discharge Slip Stanza Options**

BarcodeFontName=	Barcode 3 of 9.
BarcodeFontSize=	12.
StartStopChar=	<p>* (or another user-defined symbol, such as ?) used to define the beginning and end of the barcode when it is printed on a slip.</p> <p>This is used in conjunction with the <code>PrintStartStopChar=</code> variable.</p>
PrintStartStopChar=	<p><b>Y</b> or <b>N</b> flag that instructs the system to print or not print the <code>StartStopChar=</code>.</p> <p>If <b>Y</b>, then the barcode is printed between the defined <code>StartStopChar=</code>.</p> <p>For example, if the <code>StartStopChar=*</code>, and the barcode is 123, then <code>*123*</code> would print as the barcode on the slip.</p> <p>If <b>N</b>, then using the values above, when printing the barcode on the slip it will simply read: 123.</p>

### **Hold Slip Stanza**

---

The `[HOLD SLIP]` stanza defines the template for printing hold slips. An example of this stanza is shown in [Figure A-4](#).

[HOLD SLIP]  
Heading=ITEM ON HOLD  
TitleLabel=Title:  
AuthorLabel=Author:  
EnumerationLabel=Enumeration:  
ChronologyLabel=Chronology:  
CopyNumberLabel=Copy:  
ItemBarcodeLabel=Item Barcode:  
ItemHeldForLabel=Item Being Held For:  
PatronLabel=Patron:  
PatronBarcodeLabel=Patron Barcode:  
PatronPhoneLabel=Patron Phone:  
HoldExpirationDateLabel=Hold Expires:  
PickupLocationLabel=Pickup At:  
CommentLabel=Patron Comment:  
HeadingFontName=Times New Roman  
HeadingFontSize=12  
HeadingFontBold=True  
HeadingFontItalic=False  
HeadingFontUnderline=False  
HeadingJustified=C  
LabelFontName=Times New Roman  
LabelFontSize=12  
LabelFontBold=True  
LabelFontItalic=False  
LabelFontUnderline=False  
TextFontName=Times New Roman  
TextFontSize=12  
TextFontBold=False  
TextFontItalic=False  
TextFontUnderline=False  
TextLeftMargin=3  
PageMargins=1  
BlankLinesBetweenSections=2  
PrintPatronName=Y  
PrintPatronBarcode=Y  
PrintPatronPhone=Y  
BarcodeFontName=Barcode 3 of 9  
BarcodeFontSize=12  
StartStopChar=\*  
PrintStartStopChar=Y

---

**Figure A-4. [HOLD SLIP] Stanza**

[Table A-3](#) describes the [HOLD SLIP] stanza.

**Table A-3. Hold Slip Stanza Options**

Variable	Options
Heading=	Can be any text.
TitleLabel=	Can be any text.
AuthorLabel=	Can be any text.
CallNumberLabel=	Can be any text.
EnumerationLabel=	Can be any text.
ChronologyLabel=	Can be any text.
CopyNumberLabel=	Can be any text.
ItemBarcodeLabel=	Can be any text.
ItemHeldForLabel=	Can be any text.
PatronLabel=	Can be any text.
PatronBarcodeLabel=	Can be any text.
PatronPhoneLabel=	Can be any text.
HoldExpirationDateLabel=	Can be any text.
PickupLocationLabel=	Can be any text.
CommentLabel=	Can be any text.  The information that displays after this label is the content of the hold/recall patron note or the call slip note.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.

**Table A-3. Hold Slip Stanza Options**

LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the left margin for the text.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the patron's name, or N to not print the name.
PrintPatronBarcode=	Enter Y to print the patron's barcode, or N to not print the barcode.
PrintPatronPhone=	Enter Y to print the patron's phone number, or N to not print the phone number.
BarcodeFontName=	Barcode 3 of 9.
BarcodeFontSize=	12.
StartStopChar=	<p>* (or another user-defined symbol, such as ?) used to define the beginning and end of the barcode when it is printed on a slip.</p> <p>This is used in conjunction with the PrintStartStopChar= variable.</p>



**Table A-3. Hold Slip Stanza Options**

PrintStartStopChar=	<p><b>Y</b> or <b>N</b> flag that instructs the system to print or not print the StartStopChar=.</p> <p>If <b>Y</b>, then the barcode is printed between the defined StartStopChar=.</p> <p>For example, if the StartStopChar=*, and the barcode is 123, then *123* would print as the barcode on the slip.</p> <p>If <b>N</b>, then using the values above, when printing the barcode on the slip it will simply read: 123.</p>
---------------------	--

### Routing Slip Stanza

---

The [ROUTING SLIP] stanza defines the format for routing slips. A sample of this stanza displays in [Figure A-5](#).

```
[ROUTING SLIP]
Heading=ROUTE ITEM
HeadingExt=FOR HOLD
TitleLabel=Title:
AuthorLabel=Author:
CallNumberLabel=Call Number:
EnumerationLabel=Enumeration:
ChronologyLabel=Chronology:
CopyNumberLabel=Copy:
ItemBarcodeLabel=Item Barcode:
RoutingLocationLabel=Route To:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
PageMargins=1
BlankLinesBetweenSections=2
BarcodeFontName=Barcode 3 of 9
BarcodeFontSize=12
StartStopChar=*
PrintStartStopChar=Y
```

**Figure A-5. Example of the Routing Slip Stanza**

[Table A-4](#) describes the [ROUTING SLIP] stanza.

**Table A-4. Routing Slip Stanza Options**

Variable	Options
Heading=	Can be any text.
HeadingExt=	Can be any text.
TitleLabel=	Can be any text.
AuthorLabel=	Can be any text.
CallNumberLabel=	Can be any text.
EnumerationLabel=	Can be any text.
ChronologyLabel=	Can be any text.
CopyNumberLabel=	Can be any text.
ItemBarcodeLabel=	Can be any text.
RoutingLocationLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.

**Table A-4. Routing Slip Stanza Options**

TextFontItalic=	See HeadingFontItalic.
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the left margin for the text.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
BarcodeFontName=	Barcode 3 of 9.
BarcodeFontSize=	12.
StartStopChar=	<p>* (or another user-defined symbol, such as ?) used to define the beginning and end of the barcode when it is printed on a slip.</p> <p>This is used in conjunction with the PrintStartStopChar= variable.</p>
PrintStartStopChar=	<p><b>Y</b> or <b>N</b> flag that instructs the system to print or not print the StartStopChar=.</p> <p>If <b>Y</b>, then the barcode is printed between the defined StartStopChar=.</p> <p>For example, if the StartStopChar=*, and the barcode is 123, then *123* would print as the barcode on the slip.</p> <p>If <b>N</b>, then using the values above, when printing the barcode on the slip it will simply read: 123.</p>

## **Fine/Fee Payment Receipt Stanza**

---

The [ FINE/FEE PAYMENT RECEIPT] stanza defines the format of the receipt for payment of fines or fees. A sample of this stanza displays in [Figure A-6](#).

---

```
[FINE/FEE PAYMENT RECEIPT]
Heading=FINE/FEE PAYMENT RECEIPT
PatronLabel=Patron:
PatronBarcodeLabel=Patron
Barcode:
PatronGroupLabel=Patron Group:
DateLabel=Date:
LocationLabel=Location:
PostTypeLabel=Transaction:
PaymentMethodLabel=Method:
AmountPaidLabel=Amount:
BalanceDueLabel=Balance:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
PageMargins=1
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
BarcodeFontName=Barcode 3 of 9
BarcodeFontSize=12
StartStopChar="
PrintStartStopChar=Y
```

---

**Figure A-6. Example of the Fine/Fee Payment Receipt Stanza**

[Table A-5](#) describes the [ FINE/FEE PAYMENT RECEIPT] stanza.

**Table A-5. Fine/Fee Payment Receipt Stanza Options**

Variable	Options
Heading=	Can be any text.
PatronLabel=	Can be any text.
PatronBarcodeLabel=	Can be any text.
PatronGroupLabel=	Can be any text.
DateLabel=	Can be any text.
LocationLabel=	Can be any text.
PostTypeLabel=	Can be any text.

**Table A-5. Fine/Fee Payment Receipt Stanza Options**

PaymentMethodLabel=	Can be any text.
AmountPaidLabel=	Can be any text.
BalanceDueLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic.
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the left margin for the text.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the patron's name, or N to not print the name.

**Table A-5. Fine/Fee Payment Receipt Stanza Options**

PrintPatronBarcode=	Enter Y to print the patron's barcode, or N to not print the barcode.
PrintPatronGroup=	Enter Y to print the patron's Patron Group, or N to not print the Patron Group.
BarcodeFontName=	Barcode 3 of 9.
BarcodeFontSize=	12.
StartStopChar=	<p>* (or another user-defined symbol, such as ?) used to define the beginning and end of the barcode when it is printed on a slip.</p> <p>This is used in conjunction with the PrintStartStopChar= variable.</p>
PrintStartStopChar=	<p><b>Y</b> or <b>N</b> flag that instructs the system to print or not print the StartStopChar=.</p> <p>If <b>Y</b>, then the barcode is printed between the defined StartStopChar=.</p> <p>For example, if the StartStopChar=*, and the barcode is 123, then *123* would print as the barcode on the slip.</p> <p>If <b>N</b>, then using the values above, when printing the barcode on the slip it will simply read: 123.</p>

## Fine/Fees Statement Stanza

The [FINE/FEES STATEMENT] stanza defines the format for the statement of the patron's fines and fees. A sample of this stanza displays in [Figure A-7](#).

```
[FINE/FEE STATEMENT]
Heading=PATRON FINES/FEES
HeadingExt=HISTORY
HeadingDemerits=PATRON DEMERITS
HeadingDemeritsExt=HISTORY
PatronLabel=Patron:
PatronBarcodeLabel=Patron Barcode:
PatronGroupLabel=Patron Group:
TotalDueLabel=Total Due:
TotalDueLabelDem=Total:
DateColLabel=Date
TitleColLabel=Title/Item Barcode
PostTypeColLabel=Fee/Posting Type
FeeColLabel=Fee
PostTypeColLabelDem=Posting Type
FeeColLabelDem=Demerits
PostingColLabel=Posting
BalanceDueColLabel=Balance
DueDateSubLabel=Due:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
ColLabelFontName=Times New Roman
ColLabelFontSize=10
ColLabelFontBold=True
ColLabelFontItalic=False
ColLabelFontUnderline=False
ColTextFontName=Times New Roman
ColTextFontSize=10
ColTextFontBold=False
ColTextFontItalic=False
ColTextFontUnderline=False
DateColLeftMargin=0.75
TitleColLeftMargin=1.75
PostTypeColLeftMargin=4
FeeColRightMargin=6
PostColRightMargin=6.75
BalanceDueColRightMargin=7.8
PageMargins=0.75
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
```

**Figure A-7. Example of the Fine/Fees Statement Stanza**

[Table A-6](#) describes the [ FINE/FEES STATEMENT ] stanza.

**Table A-6. Fine/Fees Statement Stanza**

Variable	Options
Heading=	Can be any text.
HeadingExt=	Can be any text.
HeadingDemerits=	Can be any text.
HeadingDemeritsExt=	Can be any text.
PatronLabel=	Can be any text.
PatronBarcodeLabel=	Can be any text.
PatronGroupLabel=	Can be any text.
TotalDueLabel=	Can be any text.
TotalDueLabelDem=	Can be any text.
DateColLabel=	Can be any text.
TitleColLabel=	Can be any text.
PostTypeColLabel=	Can be any text.
FeeColLabel=	Can be any text.
PostingColLabel=	Can be any text.
BalanceDueColLabel=	Can be any text.
DueDateSubLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.



LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic.
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the left margin for the text.
ColLabelFontName=	See HeadingFontName.
ColLabelFontSize=	See HeadingFontSize.
ColLabelFontBold=	See HeadingFontBold.
ColLabelFontItalic=	See HeadingFontItalic.
ColLabelFontUnderline=	See HeadingFontUnderline.
ColTextFontName=	See HeadingFontName.
ColTextFontSize=	See HeadingFontSize.
ColTextFontBold=	See HeadingFontBold.
ColTextFontItalic=	See HeadingFontItalic.
ColTextFontUnderline=	See HeadingFontUnderline.
DateColLeftMargin=	Enter (in inches) the distance of the left margin of the Date column from the left edge of the page.
TitleColLeftMargin=	Enter (in inches) the distance of the left margin of the Title column from the left edge of the page.
PostTypeColLeftMargin=	Enter (in inches) the distance of the left margin of the Post Type column from the left edge of the page.
FeeColRightMargin=	Enter (in inches) the distance of the right margin of the Fee column from the right edge of the page.

PostColRightMargin=	Enter (in inches) the distance of the right margin of the Posting column from the right edge of the page.
BalanceDueColRightMargin=	Enter (in inches) the distance of the right margin of the Balance Due column from the right edge of the page.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the patron's name, or N to not print the name.
PrintPatronBarcode=	Enter Y to print the patron's barcode, or N to not print the barcode.
PrintPatronGroup=	Enter Y to print the patron's Patron Group, or N to not print the Patron Group.

## Patron Charged Items Stanza

The [PATRON CHARGED ITEMS] stanza defines the format for the list of items the patron currently has charged. A sample of this stanza displays in [Figure A-8](#).

```
[PATRON CHARGED ITEMS]
Heading=PATRON CHARGED ITEMS
PatronLabel=Patron:
PatronBarcodeLabel=Patron Barcode:
PatronGroupLabel=Patron Group:
TitleColLabel=Title/Item Barcode/Call Number
DueDateColLabel=Due Date
StatusColLabel=Status
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
CollabelFontName=Times New Roman
CollabelFontSize=10
CollabelFontBold=True
CollabelFontItalic=False
CollabelFontUnderline=False
ColTextFontName=Times New Roman
ColTextFontSize=10
ColTextFontBold=False
ColTextFontItalic=False
ColTextFontUnderline=False
TitleColLeftMargin=0.75
DueDateColLeftMargin=4.5
StatusColLeftMargin=6.25
PageMargins=.75
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
MsgFontName=Times New Roman
MsgFontSize=12
MsgFontBold=False
MsgFontItalic=True
MsgFontUnderline=False
Message=This patron has permission to remove this item from the library
```

**Figure A-8.** [PATRON CHARGED ITEMS] stanza example

[Table A-7](#) describes the [PATRON CHARGED ITEMS] stanza.

**Table A-7. Patron Charged Items Stanza**

Variable	Options
Heading=	Can be any text.
PatronLabel=	Can be any text.
PatronBarcodeLabel=	Can be any text.
PatronGroupLabel=	Can be any text.
TitleColLabel=	Can be any text.
DueDateColLabel=	Can be any text.
StatusColLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic.
TextFontUnderline=	See HeadingFontUnderline.

**Table A-7. Patron Charged Items Stanza**

<b>Variable</b>	<b>Options</b>
TextLeftMargin=	Enter (in inches) the left margin for the text.
ColLabelFontName=	See HeadingFontName.
ColLabelFontSize=	See HeadingFontSize.
ColLabelFontBold=	See HeadingFontBold.
ColLabelFontItalic=	See HeadingFontItalic.
ColLabelFontUnderline=	See HeadingFontUnderline.
ColTextFontName=	See HeadingFontName.
ColTextFontSize=	See HeadingFontSize.
ColTextFontBold=	See HeadingFontBold.
ColTextFontItalic=	See HeadingFontItalic.
ColTextFontUnderline=	See HeadingFontUnderline.
TitleColLeftMargin=	Enter (in inches) the distance of the left margin of the Title column from the left edge of the page.
DueDateColLeftMargin=	Enter (in inches) the distance of the left margin of the Due Date column from the left edge of the page.
StatusColLeftMargin=	Enter (in inches) the distance of the left margin of the Status column from the left edge of the page.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the patron's name, or N to not print the name.
PrintPatronBarcode=	Enter Y to print the patron's barcode, or N to not print the barcode.
PrintPatronGroup=	Enter Y to print the patron's Patron Group, or N to not print the Patron Group.
MsgFontName=	Must be a font name as it appears in your system's Fonts folder.

**Table A-7. Patron Charged Items Stanza**

<b>Variable</b>	<b>Options</b>
MsgFontSize=	Numeric size, in points.
MsgFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
MsgFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
MsgFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
Message=	Enter a message that will be printed at the end of the Patron Charged Items slip.

## Patron Requests (Holds and Recalls) Stanza

The [PATRON REQUESTS] stanza defines the format of the list of the patron's Hold and Recall requests. A sample of this stanza displays in [Figure A-9](#).

```
[PATRON REQUESTS]
Heading=PATRON REQUESTS
PatronLabel=Patron:
PatronBarcodeLabel=Patron Barcode:
PatronGroupLabel=Patron Group:
TitleColLabel=Title/Item Barcode
ExpiresColLabel=Expires
RankColLabel=Queue Rank
PickupLocationColLabel=Pickup Location
PendingLabel=Pending Requests:
AvailableLabel=Available for Pickup:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
ColLabelFontName=Times New Roman
ColLabelFontSize=10
ColLabelFontBold=True
ColLabelFontItalic=False
ColLabelFontUnderline=False
ColTextFontName=Times New Roman
ColTextFontSize=10
ColTextFontBold=False
ColTextFontItalic=False
ColTextFontUnderline=False
TitleColLeftMargin=0.75
ExpiresColLeftMargin=4.5
RankPickupColLeftMargin=6.25
PageMargins=.75
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
```

**Figure A-9. Example of the Patron Requests Stanza**

[Table](#) describes the [PATRON REQUESTS] stanza.

**Table A-8. Patron Requests Stanza**

Variable	Options
Heading=	Can be any text.
PatronLabel=	Can be any text.
PatronBarcodeLabel=	Can be any text.
PatronGroupLabel=	Can be any text.

**Table A-8. Patron Requests Stanza**

TitleColLabel=	Can be any text.
ExpiresColLabel=	Can be any text.
RankColLabel=	Can be any text.
PickupLocationColLabel=	Can be any text.
PendingLabel=	Can be any text.
AvailableLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic.
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the left margin for the text.
ColLabelFontName=	See HeadingFontName.
ColLabelFontSize=	See HeadingFontSize.



**Table A-8. Patron Requests Stanza**

ColLabelFontBold=	See HeadingFontBold.
ColLabelFontItalic=	See HeadingFontItalic.
ColLabelFontUnderline=	See HeadingFontUnderline.
ColTextFontName=	See HeadingFontName.
ColTextFontSize=	See HeadingFontSize.
ColTextFontBold=	See HeadingFontBold.
ColTextFontItalic=	See HeadingFontItalic.
ColTextFontUnderline=	See HeadingFontUnderline.
TitleColLeftMargin=	Enter (in inches) the distance of the left margin of the Title column from the left edge of the page.
ExpiresColLeftMargin=	Enter (in inches) the distance of the left margin of the Expires column from the left edge of the page.
RankPickupColLeftMargin=	Enter (in inches) the distance of the left margin of the Rank and the Pickup columns from the left edge of the page.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the patron's name, or N to not print the name.
PrintPatronBarcode=	Enter Y to print the patron's barcode, or N to not print the barcode.
PrintPatronGroup=	Enter Y to print the patron's Patron Group, or N to not print the Patron Group.

## Patron Call Slips Stanza

---

The [PATRON CALL SLIPS] stanza controls the print out from the **Patron Call Slips** dialog box. A sample of this stanza displays in [Figure A-10](#).

---

```
[PATRON CALL SLIPS]
Heading=PATRON CALL SLIPS
PatronLabel=Patron:
PatronBarcodeLabel=Patron Barcode:
PatronGroupLabel=Patron Group:
RequestedLabel=Date Requested:
RequestIDLabel=Request ID:
TitleLabel=Title:
AuthorLabel=Author:
LocationLabel=Holdings Location:
EnumerationLabel=Enumeration:
ChronologyLabel=Chronology:
YearLabel=Year:
PickupLocationLabel=Pickup Location:
ItemBarcodeLabel=Item Barcode:
CommentLabel=Comment:
ProcessedLabel=Date Processed:
NoFillReasonLabel=No-Fill Reason:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
PageMargins=.75
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
```

---

**Figure A-10. Example of the Patron Call Slips Stanza**

[Table A-9](#) describes the [PATRON CALL SLIP] stanza.

**Table A-9. Patron Call Slips Stanza**

Variable	Options
Heading=	Patron Call Slips
PatronLabel=	Patron:
PatronBarcodeLabel=	Patron Barcode:
PatronGroupLabel=	Patron Group:
RequestedLabel=	Date Requested:
TitleLabel=	Title:

**Table A-9. Patron Call Slips Stanza**

AuthorLabel=	Author:
LocationLabel=	Holdings Location:
EnumerationLabel=	Enumeration:
ChronologyLabel=	Chronology:
YearLabel=	Year:
ItemBarcodeLabel=	Item Barcode:
CommentLabel=	Comment:
ProcessedLabel=	Date Processed:
NoFillReasonLabel=	No-Fill Reason:
HeadingFontName=	Times New Roman
HeadingFontSize=	12
HeadingFontBold=	True
HeadingFontItalic=	False
HeadingFontUnderline=	False
HeadingJustified=	C
LabelFontName=	Times New Roman
LabelFontSize=	12
LabelFontBold=	True
LabelFontItalic=	False
LabelFontUnderline=	False
TextFontName=	Times New Roman
TextFontSize=	12
TextFontBold=	False
TextFontItalic=	False
TextFontUnderline=	False
TextLeftMargin=	3
PageMargins=	.75
BlankLinesBetweenSections=	2
PrintPatronName=	Y
PrintPatronBarcode=	Y

**Table A-9. Patron Call Slips Stanza**

PrintPatronGroup=	Y
-------------------	---

---

**Circulation History Stanza**

The [CIRCULATION HISTORY] stanza defines the Item Circulation History statement. A sample of this stanza displays in [Figure A-11](#).

---

```
[CIRCULATION HISTORY]
Heading=ITEM CIRCULATION HISTORY
TitleLabel=Title:
AuthorLabel=Author:
CallNumberLabel=Call Number:
EnumerationLabel=Enumeration:
ChronologyLabel=Chronology:
ItemBarcodeLabel=Item Barcode:
PatronColLabel=Patron Name/Barcode
ChargeDateColLabel=Charged
DischargeDateColLabel=Discharged
RecallDateColLabel=Recalled
RenewCountColLabel=Renewed
NoPatronInfo=<no patron information>
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
ColLabelFontName=Times New Roman
ColLabelFontSize=10
ColLabelFontBold=True
ColLabelFontItalic=False
ColLabelFontUnderline=False
ColTextFontName=Times New Roman
ColTextFontSize=10
ColTextFontBold=False
ColTextFontItalic=False
ColTextFontUnderline=False
PatronColLeftMargin=0.75
ChargeDateColLeftMargin=3.25
DischargeDateColLeftMargin=4.5
RecallDateColLeftMargin=5.875
RenewCountColRightMargin=7.5
PageMargins=.75
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
PrintZero=N
```

---

**Figure A-11. Example of the Circulation History Stanza**

[Table A-10](#) describes the [CIRCULATION HISTORY] stanza.

**Table A-10. Circulation History Stanza**

Variable	Options
Heading=	Can be any text.
TitleLabel=	Can be any text.
AuthorLabel=	Can be any text.
CallNumberLabel=	Can be any text.
EnumerationLabel=	Can be any text.
ChronologyLabel=	Can be any text.
ItemBarcodeLabel=	Can be any text.
PatronColLabel=	Can be any text.
ChargeDateColLabel=	Can be any text.
DischargeDateColLabel=	Can be any text.
RecallDateColLabel=	Can be any text.
RenewCountColLabel=	Can be any text.
NoPatronInfo=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.
LabelFontUnderline=	See HeadingFontUnderline.

**Table A-10. Circulation History Stanza**

TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic.
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the left margin for the text.
ColLabelFontName=	See HeadingFontName.
ColLabelFontSize=	See HeadingFontSize.
ColLabelFontBold=	See HeadingFontBold.
ColLabelFontItalic=	See HeadingFontItalic.
ColLabelFontUnderline=	See HeadingFontUnderline.
ColTextFontName=	See HeadingFontName.
ColTextFontSize=	See HeadingFontSize.
ColTextFontBold=	See HeadingFontBold.
ColTextFontItalic=	See HeadingFontItalic.
ColTextFontUnderline=	See HeadingFontUnderline.
PatronColLeftMargin=	Enter (in inches) the distance of the left margin of the Patron column from the left edge of the page.
ChargeDateColLeftMargin=	Enter (in inches) the distance of the left margin of the Charge Date column from the left edge of the page.
DischargeDateColLeftMargin=	Enter (in inches) the distance of the left margin of the Discharge Date column from the left edge of the page.
RecallDateColLeftMargin=	Enter (in inches) the distance of the left margin of the Recall Date column from the left edge of the page.
RenewCountColRightMargin=	Enter (in inches) the distance of the right margin of the RenewCountColRightMargin column from the right edge of the page.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.

**Table A-10. Circulation History Stanza**

BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the patron's name, or N to not print the name.
PrintPatronBarcode=	Enter Y to print the patron's barcode, or N to not print the barcode.
PrintPatronGroup=	Enter Y to print the patron's Patron Group, or N to not print the Patron Group.
PrintZero=	Enter Y to print zeroes on the statement, or N to not print any zeroes.

### Reserve Pick List Stanza

---

The [RESERVE PICK LIST] stanza defines the template for printing the reserve pick list. A sample of this stanza displays in [Figure A-12](#).

---

```
[RESERVE PICK LIST]
Heading=RESERVE PICK LIST
ListLabel=List Name:
EffectiveDatesLabel=Effective:
TitleLabel=Title:
AuthorLabel=Author:
CallNumberLabel=Call Number:
ItemLocationLabel=Item Location:
ItemTypeLabel=Item Type:
ItemBarcodeLabel=Item Barcode:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
PageMargins=.75
BlankLinesBetweenSections=2
```

**Figure A-12. Example of the Reserve Pick List Stanza**

[Table A-11](#) describes the [RESERVE PICK LIST] stanza.

**Table A-11. Reserve Pick List Stanza**

Variable	Options
Heading=	Can be any text.
ListLabel=	Can be any text.
EffectiveDatesLabel=	Can be any text.
TitleLabel=	Can be any text.
AuthorLabel=	Can be any text.
CallNumberLabel=	Can be any text.
ItemLocationLabel=	Can be any text.
ItemTypeLabel=	Can be any text.
ItemBarcodeLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic.



**Table A-11. Reserve Pick List Stanza**

TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the left margin for the text.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.

### MARC Record Stanza

The [MARC RECORD] stanza defines the template for printing MARC records. A sample of this stanza displays in [Figure A-13](#).

```
[MARC RECORD]
BibHeading=Bibliographic Record
HoldingsHeading=Holdings Record
TagColLabel=Tag
Ind1ColLabel=Ind 1
Ind2ColLabel=Ind 2
FieldColLabel=Field Data
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
ColLabelFontName=Times New Roman
ColLabelFontSize=10
ColLabelFontBold=True
ColLabelFontItalic=False
ColLabelFontUnderline=False
ColTextFontName=Times New Roman
ColTextFontSize=10
ColTextFontBold=False
ColTextFontItalic=False
ColTextFontUnderline=False
TagColLeftMargin=0.75
Ind1ColLeftMargin=1.25
Ind2ColLeftMargin=1.75
FieldColLeftMargin=2.3
PageMargins=.75
BlankLinesBetweenSections=2
PrintDateTime=Y
```

**Figure A-13. Example of the MARC Record Stanza**

[Table A-12](#) describes the [MARC RECORDS] stanza.

**Table A-12. MARC Records Stanza**

Variable	Options
BibHeading=	Can be any text.
HoldingsHeading=	Can be any text.
TagColLabel=	Can be any text.
Ind1ColLabel=	Can be any text.
Ind2ColLabel=	Can be any text.
FieldColLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
ColLabelFontName=	See HeadingFontName.
ColLabelFontSize=	See HeadingFontSize.
ColLabelFontBold=	See HeadingFontBold.
ColLabelFontItalic=	See HeadingFontItalic.
ColLabelFontUnderline=	See HeadingFontUnderline.
ColTextFontName=	See HeadingFontName.
ColTextFontSize=	See HeadingFontSize.
ColTextFontBold=	See HeadingFontBold.
ColTextFontItalic=	See HeadingFontItalic.
ColTextFontUnderline=	See HeadingFontUnderline.
TagColLeftMargin=	Enter (in inches) the distance of the left margin of the Tag column from the left edge of the page.

**Table A-12. MARC Records Stanza**

Ind1ColLeftMargin=	Enter (in inches) the distance of the left margin of the Ind1 column from the left edge of the page.
Ind2ColLeftMargin=	Enter (in inches) the distance of the left margin of the Ind2 column from the left edge of the page.
FieldColLeftMargin=	Enter (in inches) the distance of the left margin of the Field column from the left edge of the page.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintDateTime=	Enter Y to print the date and time, or N to not print the date and time.

## Short Loan Info Stanza

---

The [SHORT LOAN INFO] stanza defines the template for the short loan list printed from the **Patron Request Information** dialog box. A sample of this stanza displays in [Figure A-14](#).

---

```
[SHORT LOAN INFO]
Heading=SHORT LOAN INFO
PatronLabel=Patron:
PatronBarcodeLabel=Patron Barcode:
PatronGroupLabel=Patron Group:
TitleColLabel=Title/Item Barcode
PickupLocColLabel=Pickup Location
StartEndTimeColLabel=Start/End Time
AvailColLabel=Available
PendingLabel=Pending Requests:
AvailableLabel=Available for Pickup:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
ColLabelFontName=Times New Roman
ColLabelFontSize=10
ColLabelFontBold=True
ColLabelFontItalic=False
ColLabelFontUnderline=False
ColTextFontName=Times New Roman
ColTextFontSize=10
ColTextFontBold=False
ColTextFontItalic=False
ColTextFontUnderline=False
TitleColLeftMargin=0.75
PickLocColLeftMargin=3.5
StartEndTimeColLeftMargin=4.75
AvailColLeftMargin=6.75
PageMargins=.75
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
```

---

**Figure A-14. Example of the Short Loan Info Stanza**

[Table A-13](#) describes the [SHORT LOAN INFO] stanza.

**Table A-13. Short Loan Info Stanza**

Variable	Options
Heading=	Can be any text.
PatronLabel=	Can be any text.
PatronBarcodeLabel=	Can be any text.

**Table A-13. Short Loan Info Stanza**

PatronGroupLabel=	Can be any text.
TitleColLabel=	Can be any text.
PickupLocColLabel=	Can be any text.
StartEndTimeColLabel=	Can be any text.
AvailColLabel=	Can be any text.
PendingLabel=	Can be any text.
AvailableLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic.
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the distance of the left margin of the Patron name, Patron Barcode and Patron Group information from the left edge of the page.

**Table A-13. Short Loan Info Stanza**

ColLabelFontName=	See HeadingFontName.
ColLabelFontSize=	See HeadingFontSize.
ColLabelFontBold=	See HeadingFontBold.
ColLabelFontItalic=	See HeadingFontItalic.
ColLabelFontUnderline=	See HeadingFontUnderline.
ColTextFontName=	See HeadingFontName.
ColTextFontSize=	See HeadingFontSize.
ColTextFontBold=	See HeadingFontBold.
ColTextFontItalic=	See HeadingFontItalic.
ColTextFontUnderline=	See HeadingFontUnderline.
TitleColLeftMargin=	Enter (in inches) the distance of the left margin of the Title column from the left edge of the page.
PickLocColLeftMargin=	Enter (in inches) the distance of the left margin of the Pick Location column from the left edge of the page.
StartEndTimeColLeftMargin=	Enter (in inches) the distance of the left margin of the Start/End Time column from the left edge of the page.
AvailColColLeftMargin=	Enter (in inches) the distance of the left margin of the Available column from the left edge of the page.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the Patron's name or N to not print the patron's name.
PrintPatronBarcode=	Enter Y to print the patron's barcode or N to not print the patron's barcode.
PrintPatronGroup=	Enter Y to print the patron group or N to not print the patron group.

## Short Loan Search Stanza

The [SHORT LOAN SEARCH] stanza defines the template for the list printed from the **Short Loan Search List** dialog box. A sample of this stanza displays in [Figure A-15](#).

```
[SHORT LOAN SEARCH]
Heading=SHORT LOAN SEARCH
PatronLabel=Patron:
PatronBarcodeLabel=Patron Barcode:
PatronGroupLabel=Patron Group:
PatronColLabel=Patron Name
TitleColLabel=Title
CallNumberColLabel=Call Number
EnumChronColLabel=Enum/Chron
ItemLocColLabel=Location Name
ItemStatusColLabel=Item Status
StartEndTimeColLabel=Start/End Time
PickupLocationColLabel=Pickup Location
PendingLabel=Pending Requests:
AvailableLabel=Available for Pickup:
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
ColLabelFontName=Times New Roman
ColLabelFontSize=10
ColLabelFontBold=True
ColLabelFontItalic=False
ColLabelFontUnderline=False
ColTextFontName=Times New Roman
ColTextFontSize=10
ColTextFontBold=False
ColTextFontItalic=False
ColTextFontUnderline=False
PatronColLeftMargin=0.75
TitleColLeftMargin=1.75
CallNumberColLeftMargin=2.5
EnumChronColLeftMargin=3.25
ItemLocColLeftMargin=4.75
ItemStatusColLeftMargin=5.75
StartEndTimeColLeftMargin=6.75
PageMargins=.75
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
```

**Figure A-15. Example of the Short Loan Search Stanza**

[Table A-14](#) describes the [SHORT LOAN SEARCH] stanza.

**Table A-14. Short Loan Search Stanza**

Variable	Options
Heading=	Can be any text.
PatronLabel=	Can be any text.
PatronBarcodeLabel=	Can be any text.
PatronGroupLabel=	Can be any text.
PatronColLabel=	Can be any text.
TitleColLabel=	Can be any text.
CallNumberColLabel=	Can be any text.
EnumChronColLabel=	Can be any text.
ItemLocColLabel=	Can be any text.
ItemStatusColLabel=	Can be any text.
StartEndTimeColLabel=	Can be any text.
PickupLocationColLabel=	Can be any text.
PendingLabel=	Can be any text.
AvailableLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.



**Table A-14. Short Loan Search Stanza**

LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic.
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the distance of the left margin of the Patron name, Patron Barcode, and Patron Group information from the left edge of the page.
ColLabelFontName=	See HeadingFontName.
ColLabelFontSize=	See HeadingFontSize.
ColLabelFontBold=	See HeadingFontBold.
ColLabelFontItalic=	See HeadingFontItalic.
ColLabelFontUnderline=	See HeadingFontUnderline.
ColTextFontName=	See HeadingFontName.
ColTextFontSize=	See HeadingFontSize.
ColTextFontBold=	See HeadingFontBold.
ColTextFontItalic=	See HeadingFontItalic.
ColTextFontUnderline=	See HeadingFontUnderline.
PatronColLeftMargin=	Enter (in inches) the distance of the left margin of the Patron column from the left edge of the page.
TitleColLeftMargin=	Enter (in inches) the distance of the left margin of the Title column from the left edge of the page.
CallNumberColLeftMargin=	Enter (in inches) the distance of the left margin of the Call Number column from the left edge of the page.
EnumChronColLeftMargin=	Enter (in inches) the distance of the left margin of the Enumeration/Chronology column from the left edge of the page.
ItemLocColLeftMargin=	Enter (in inches) the distance of the left margin of the Item Location column from the left edge of the page.

**Table A-14. Short Loan Search Stanza**

ItemStatusColLeftMargin=	Enter (in inches) the distance of the left margin of the Item Status column from the left edge of the page.
StartEndTimeColLeftMargin=	Enter (in inches) the distance of the left margin of the Start/End Time column from the left edge of the page.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the Patron's name or N to not print the patron's name.
PrintPatronBarcode=	Enter Y to print the patron's barcode or N to not print the patron's barcode.
PrintPatronGroup=	Enter Y to print the patron group or N to not print the patron group.

## Item Distribution Stanza

The [ITEM DISTRIBUTION] stanza defines the template for the list printed from the **Item Distribution** dialog box. A sample of this stanza displays in [Figure A-16](#).

```
[ITEM DISTRIBUTION]
Heading=ITEM DISTRIBUTION
ActiveColLabel=Active?
TitleColLabel=Title
LocationColLabel=Location
EnumChronColLabel=Enum/Chron
CallNumberColLabel=Call Number
OnHandQtyColLabel=On-Hand
ActiveBarcodeColLabel=Active Barcode
ExpectedDateColLabel=Expected Date
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
ColLabelFontName=Times New Roman
ColLabelFontSize=10
ColLabelFontBold=True
ColLabelFontItalic=False
ColLabelFontUnderline=False
ColTextFontName=Times New Roman
ColTextFontSize=10
ColTextFontBold=False
ColTextFontItalic=False
ColTextFontUnderline=False
ActiveColLeftMargin=0.0
TitleColLeftMargin=.60
LocationColLeftMargin=2.25
EnumChronColLeftMargin=3.75
CallNumberColLeftMargin=5.25
OnHandQtyColLeftMargin=6.75
ActiveBarcodeColLeftMargin=7.50
ExpectedDateColLeftMargin=8.60
PageMargins=.75
BlankLinesBetweenSections=2
```

**Figure A-16. Example of the Item Distribution Stanza**

[Table A-15](#) describes the [ITEM DISTRIBUTION] stanza.

**Table A-15. Item Distribution Stanza**

Variable	Options
Heading=	Can be any text.
ActiveColLabel=	Can be any text.
TitleColLabel=	Can be any text.
LocationColLabel=	Can be any text.

**Table A-15. Item Distribution Stanza**

EnumChronColLabel=	Can be any text.
CallNumberColLabel=	Can be any text.
OnHandQtyLabel=	Can be any text.
ActiveBarcodeColLabel=	Can be any text.
ExpectedDateColLabel=	Can be any text.
HeadingFontName=	Must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	Numeric size, in points.
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text, enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text, enter False to get plain text.
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic.
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic.
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the distance of the left margin of the Patron name, Patron Barcode, and Patron Group information from the left edge of the page.
ColLabelFontName=	See HeadingFontName.
ColLabelFontSize=	See HeadingFontSize.
ColLabelFontBold=	See HeadingFontBold.

**Table A-15. Item Distribution Stanza**

ColLabelFontItalic=	See HeadingFontItalic.
ColLabelFontUnderline=	See HeadingFontUnderline.
ColTextFontName=	See HeadingFontName.
ColTextFontSize=	See HeadingFontSize.
ColTextFontBold=	See HeadingFontBold.
ColTextFontItalic=	See HeadingFontItalic.
ColTextFontUnderline=	See HeadingFontUnderline.
ActiveColLeftMargin=	Enter (in inches) the distance of the left margin of the Patron column from the left edge of the page.
TitleColLeftMargin=	Enter (in inches) the distance of the left margin of the Title column from the left edge of the page.
LocationColLeftMargin=	Enter (in inches) the distance of the left margin of the Call Number column from the left edge of the page.
EnumChronColLeftMargin=	Enter (in inches) the distance of the left margin of the Enumeration/Chronology column from the left edge of the page.
CallNumberColLeftMargin=	Enter (in inches) the distance of the left margin of the Item Location column from the left edge of the page.
OnHandQtyColLeftMargin=	Enter (in inches) the distance of the left margin of the Item Status column from the left edge of the page.
ActiveBarcodeColLeftMargin=	Enter (in inches) the distance of the left margin of the Start/End Time column from the left edge of the page.
ExpectedDateColLeftMargin=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
PageMargins	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.



---

## Printing Labels

# B

---

### Introduction

Users can print spine and piece labels by selecting **Print Spine Label** from the **Item** menu from an open Item Record. A spine label can be used for printing call number data on an attachment to an item for shelving purposes. A piece label can be an attachment to an item for general identification purposes.

**NOTE:**

These labels print in the Latin-1 character set.

Spine and piece labels can be customized. You can create separate spine and piece templates from bibliographic, holding, item and serial records. The templates are defined in the file `spinelabel.cfg` which is located in the `c:\Voyager\Misc` subdirectory.

The default settings are as follows: the size of a spine label is 1 5/8" high by 9/10" wide; the size of a piece label is 1 5/8" high by 2 9/10" wide. This may be changed by your institution.

---

### Printing Bibliographic Record Information

Printing a spine or piece label must be done from an active record. If the active record is a bibliographic record, the following is the default information that displays in the **Print Label** dialog box. You can change this information at any time before you print.

### **Spine Label**

- Spine Label Name (as defined for the Location in System Administration), Address and Bib ID

### **Piece Label**

- Spine Label Name (as defined for the Location in System Administration), Address, Bib ID, Title, and Title Brief

## **Printing Holdings Record Information**

---

If the active record is a holdings record, the following is the default information that automatically displays. You can change this information at any time before you print.

### **Spine Label**

- Mfhd ID and Call Number

### **Piece Label**

- Mfhd ID and Call Number

## **Printing Item Record Information**

---

If you select Print Label and the active record is an item record, the following information automatically displays. You can change this information at any time before you print.

### **Spine Label**

- Spine Label Name (as defined for the Location in System Administration). Address and Bib ID

### **Piece Label**

- Spine Label Name (as defined for the Location in System Administration), Address, Bib ID, Item ID, Copy Number, and Item Barcode

## **Spine and Piece Label Print Template**

---

The spine and piece label print template allows you to customize the appearance of spine and piece labels from bibliographic, holdings, item, and serial records. You can also create a template for a label with solely general information. In addition, you can define what kind of information displays on each label,



customize its layout and appearance, and specify the number of copies that are to be printed. This information is contained in a file called `spinelabel.cfg` which is located in the `c:\Voyager\Misc` directory on the client workstation.

The `spinelabel.cfg` file contains a `[Templates]` stanza and for each type of information that can be printed, there are three stanzas.

- `[Print Options...]` stanza
- `[Print Template Label...]` stanza
- `[Print Template Piece...]` stanza

The ellipses represent the type of record. For example, for bibliographic items the names of the appropriate stanzas would be `[Print Options Bibliographic]`, `[Print Template Label Bibliographic]`, and `[Print Template Piece Bibliographic]`.

**IMPORTANT:**

*These stanza names cannot be changed. Altering the stanza names cause label printing to fail.*

### **Templates Stanza**

---

The `[Templates]` stanza at the beginning of the file contains the list of the different types of templates that can be customized.

The following types of templates can be customized:

- Blank
- Bibliographic
- Holdings
- Items
- Serial Issue

**IMPORTANT:**

*The `[Templates]` stanza **cannot** be changed. Editing the `[Templates]` stanza in any way causes label printing to become unpredictable.*

### **Print Options... Stanza**

---

The `[Print Options...]` stanza contains the formatting and general information regarding the label.

[Table B-1](#) describes the [Print Options] stanza.

**Table B-1. Sample [Print Options Bibliographic] Stanza**

Options	Description
StandardFont=	Name of the default font.
StandardFontSize=	Size of the default font.
AlternateFont=	Name of the alternate font. See <a href="#">Printing in the Alternate Font</a> on <a href="#">page B-7</a> .
AlternateFontSize=	Size of the alternate font. See <a href="#">Printing in the Alternate Font</a> on <a href="#">page B-7</a> .
Copies=	Number of copies that are to be printed.
TabWidth=	Width in inches that the tab code (\T) represents. See <a href="#">Action Codes</a> on <a href="#">page B-6</a> .
Margin=	Label's left margin, in inches.
SpineLabelHeight=	Height of the spine label, in inches.
SpineLabelWidth=	Width of the spine label, in inches.
PieceLabelHeight=	Height of the piece label, in inches.
PieceLabelWidth=	Width of the piece label, in inches.

### **Print Template Label/Print Template Piece Stanza**

The [Print Template Piece...] stanza contains the information and the layout according to which the piece label is to be printed.

The [Print Template Label...] stanza contains the information and the layout according to which the spine label is to be printed.

These stanzas are completely customizable. Any type of information can be entered into the stanza, as well as any additional text or field labels.

[Figure B-1](#) shows an example of a [Print Template Label...] stanza.

```
[Print Template Label SerialIssue]
Name: \B\F102\b
Addr1: \U\F510\u
Component Name: \F600
Enum Chron: \F601
Receipt Date: \F602
```

---

**Figure B-1. Sample Print Template Label...**

[Figure B-2](#) shows an example of a [Print Template Piece...] stanza.

```
[Print Template Piece SerialIssue]
Name: \B\F102\b
Addr1: \U\F510\u
Component Name: \F600
Enum Chron: \F601
Receipt Date: \F602
```

---

**Figure B-2. Sample Print Template Piece...**

Whatever you enter in the [Print Template Label...] or [Print Template Piece...] stanzas displays on the label. The text that you enter displays onscreen. To get specific information (such as the Title) out of the database and onto a label, you can enter **action codes**.

If nothing is entered in a particular [Print Template Label...] or [Print Template Piece...] stanza, nothing displays for that label or piece onscreen. However, you may still enter anything into the label or piece field in the **Print Labels** dialog box and print that information.

**Action codes**(see “Action Codes” on page 6) are used in these stanzas to change how the information displays on the label, and certain **field codes** (see “Spine Label Field Codes” on page 8) that you can enter after the **IF** action code are used to specify the field information that is to be printed.

The information you enter in the [Print Template Label...] and [Print Template Piece...] stanzas prints with the font and font size specified in the StandardFont and StandardFontSize variables in the [Print Options...] stanza for that type of record, unless you specify otherwise (see [Printing in the Alternate Font](#) on [page B-7](#) and [Changing Font Size](#) on [page B-8](#)).

## Action Codes

[Table B-2](#) is a list of action codes used to change how the information displays on the labels.

**Table B-2. Action Codes List**

Code	Action
\	prints a blank line
\A	starts alternate font
\a	ends alternate font
\B	starts bold
\b	ends bold
\I	starts italic
\i	ends italic
\U	starts underline
\u	ends underline
\S	starts new font size (a two digit size must follow \S)
\s	ends new font size
\T	inserts a tab
\F	inserts field data (a three digit field code must follow \F)

## Initiating and Ending Action Codes

The \A and \a, \B and \b, \I and \i, \U and \u, and \S and \s action codes are initiated by entering the uppercase action code before the information it is to effect. They are ended by entering the lowercase action code after the information it is to effect.

For example, if you want the caption Item Barcode: to print in bold, enter:

```
\BItem Barcode:\b
```

## Printing Field Information

To print field information, you must enter a field code after the \F action code.

For example, if you entered Item Barcode: as a caption and wanted the item barcode information to be retrieved from the server and printed after the Item Barcode: caption, you would enter:

```
Item Barcode: F\401
```

## Printing in the Alternate Font

To have the item barcode information print in the alternate font and font size, you would enter the \A action code when the alternate font is to start and the \a action code when the alternate font is to end:

```
Item Barcode= \A\F401\a
```

The alternate font is specified after the AlternateFont variable, and the alternate font size is specified after the AlternateFontSize variable. Both of these display in the [Print Options...] stanza for that type of record.

If you have chosen your alternate font as a barcode font, you may need to print a few lines of blank space beneath the information that is to be printed with the barcode font to ensure that the barcode does not overlap with the information beneath it. Enter the backslash (\) action code on a line by itself to print a blank line.

### NOTE:

The barcode font that is included with Voyager is called Barcode 3 of 9. If you use this font as your alternate font and your scanning device requires start/stop characters, you must put an asterisk (\*) on both sides of the field that is to be printed with the alternate font in order for your scanner to read the barcode after it is printed. For example, if you want to print the item barcode field in the alternate font, and you have selected as your alternate font Barcode 3 of 9, you would enter:

```
\A*\F401*\a
```

In addition, if you are using this barcode font, and you make it print bold, the barcode height prints taller and the digits normally beneath the barcode are not visible. For example:

```
\B\A*\F401*\a\b
```

If you are using the barcode font and you make it print italic, the barcode height prints shorter. If you chose to use a different barcode font, you should read the documentation on the barcode font to determine what start/stop character must be used. For example:

```
\I\A*\F401*\a\i
```

### Changing Font Size

To change the size of the font that the information is printing in, you would enter the \S## action code (where ## stands for the two-digit size of the font) before the information, and the \s action code after the information. For example:

```
\S24\F401\s
```

If you do not enter the \s action code after the information, all subsequent information is printed with this new font size.

### Inserting a Blank Line

To insert an extra line of space between different lines of information on a printout, you would enter the backslash ( \ ) action code on a line by itself between the different lines of information.

### Inserting a Tab

To tab a piece of information over from the left margin, you would enter the \T action code before the information. The tab width that applies to this action code is specified after the TabWidth variable in the [Print Options...] stanza for that type of record.

### Spine Label Field Codes

[Table B-3](#) describes Spine Label Field Codes.

**Table B-3. Spine Label Field Codes**

Generic Field Codes - 100 Series	
Current Date & Time	100
Library Display Name	101
Library Name	102
NUC Code	103

**Table B-3. Spine Label Field Codes**

<b>Bibliographic Field Codes - 200 Series</b>	
Bib_Id	200
Title - Brief	201
Title - Full	202
Author	203
Imprint	204
<b>Holdings Field Codes - 300 Series</b>	
Mfhd_Id	300
Call Number - Display Format	301
<b>Item Field Codes - 400 Series</b>	
Item_Id	400
Item Barcode	401
Enumeration	402
Chronology	403
Year	404
Caption	405
Free Text	406
Copy Number	407
Item Type Code	411
Item Type Name	412
Item Type Display	413
Item Location Code Prints the temporary location if there is one, otherwise prints the permanent location.	414
Item Location Name	415
Item Location Display Name	416
Item Location Spine Label	417
Pieces	418

**Table B-3. Spine Label Field Codes**

Price	419
Spine Label	420
<b>Library Address Field Codes - 500 Series</b>	
Address Line 1	510
Address Line 2	511
Address Line 3	512
Address Line 4	513
Address Line 5	514
City	515
State/Province	516
Zip/Postal Code	517
Country	518
<b>Received Serial Issue Field Codes - 600 Series</b>	
Component Name	600
Enum Chron	601
Receipt Date	602

## **Sample Spinelabel.cfg File**

---

A sample `spinelabel.cfg` file is shown in [Figure B-3](#).



```
[Templates]
Blank
Bibliographic
Holdings
Item
SerialIssue

[Print Options Blank]
StandardFont=Times New Roman
StandardFontSize=12
AlternateFont=Arial
AlternateFontSize=12
Copies=3
TabWidth=1
Margin=0.05
SpineLabelHeight=1.625
SpineLabelWidth=.9
PieceLabelHeight=1.625
PieceLabelWidth=2.9

[Print Template Spine Blank]
Name: \B\F102\b
Addr1: \U\F510\u
Addr2: \F511
Addr3: \F512
Addr4: \F513
Addr5: \F514
City: \F515
St: \F516
Zip: \F517
Country: \F518

[Print Template Piece Blank]
Name: \B\F102\b
```

```
Addr1: \U\F510\u
Addr2: \F511
Addr3: \F512
Addr4: \F513
Addr5: \F514
City: \F515
St: \F516
Zip: \F517
Country: \F518
[Print Options Bibliographic]
StandardFont=Times New Roman
StandardFontSize=12
AlternateFont=Arial
AlternateFontSize=12
Copies=1
TabWidth=1
Margin=0.05
SpineLabelHeight=1.625
SpineLabelWidth=.9
PieceLabelHeight=1.625
PieceLabelWidth=2.9

[Print Template Spine Bibliographic]
Name: \B\F102\b
Addr1: \U\F510\u
Bib Id: \F200
Author: \F203
Imprint:
Title: \F202
Title - Brief: \F201

[Print Template Piece Bibliographic]
Name: \B\F102\b
Addr1: \U\F510\u
Bib Id: \F200
```

```
Author: \F203
Imprint:
Title: \F202
Title - Brief: \F201

[Print Options Holdings]
StandardFont=Times New Roman
StandardFontSize=12
AlternateFont=Arial
AlternateFontSize=12
Copies=1
TabWidth=1
Margin=0.05
SpineLabelHeight=1.625
SpineLabelWidth=.9
PieceLabelHeight=1.625
PieceLabelWidth=2.9

[Print Template Spine Holdings]
Mfhd Id: \F300
Call Number: \F301

[Print Template Piece Holdings]
Mfhd Id: \F300
Call Number: \F301

[Print Options Item]
StandardFont=Times New Roman
StandardFontSize=12
AlternateFont=Arial
AlternateFontSize=12
Copies=1
TabWidth=1
Margin=0.05
SpineLabelHeight=1.625
```

```
SpineLabelWidth=.9
PieceLabelHeight=1.625
PieceLabelWidth=2.9

[Print Template Spine Item]
Name: \B\F102\b
Addr1: \U\F510\u
Bib Id: \F200
Author: \F203
Chron: \F403
Caption: \F405
Free Text: \F406
Enumeration: \F402
Item Id: \F400
Year: \F404
Copy Number: \F407
Pieces:
Price:
Spine Label:
Item Barcode: \F401
Item Type Code:
Item Type:
Item Type Display:
Item Location Code:
Item Location Display Name:
Item Location:
Media Type:
Media Type Code:

[Print Template Piece Item]
Name: \B\F102\b
Addr1: \U\F510\u
Bib Id: \F200
Author: \F203
Chron: \F403
```

Caption: \F405  
Free Text: \F406  
Enumeration: \F402  
Item Id: \F400  
Year: \F404  
Copy Number: \F407  
Pieces:  
Price:  
Spine Label:  
Item Barcode: \F401  
Item Type Code:  
Item Type:  
Item Type Display:  
Item Location Code:  
Item Location Display Name:  
Item Location:  
Media Type:  
Media Type Code:

[Print Options Serial Issue]  
StandardFont=Times New Roman  
StandardFontSize=12  
AlternateFont=Arial  
AlternateFontSize=12  
Copies=1  
TabWidth=1  
Margin=0.05  
SpineLabelHeight=1.625  
SpineLabelWidth=.9  
PieceLabelHeight=1.625  
PieceLabelWidth=2.9

[Print Template Spine Serial Issue]  
Name: \B\F102\b  
Addr1: \U\F510\u

```
Component Name: \F600
Enum Chron: \F601
Receipt Date: \F602
[Print Template Piece Serial Issue]
Name: \B\F102\b
Addr1: \U\F510\u
Component Name: \F600
Enum Chron: \F601
Receipt Date: \F602
```

---

**Figure B-3. Sample Spinelabel.cfg File**

## **Printing Spine and Piece Labels**

---

To print spine and piece labels you must have an item record open and active.



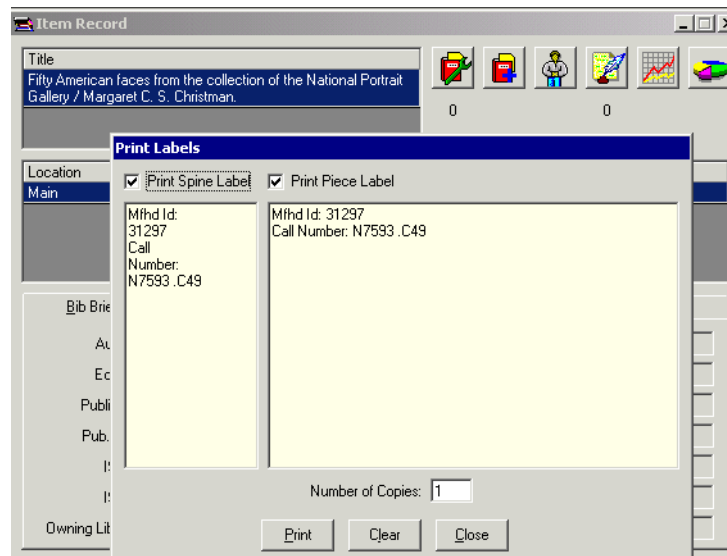
### **Procedure B-1. Printing Spine and Piece Labels**

---

Use the following to print labels.

1. Select **Print Spine Label** from the **Item** menu.

Result: The **Print Labels** dialog box opens (see [Figure B-4](#)).



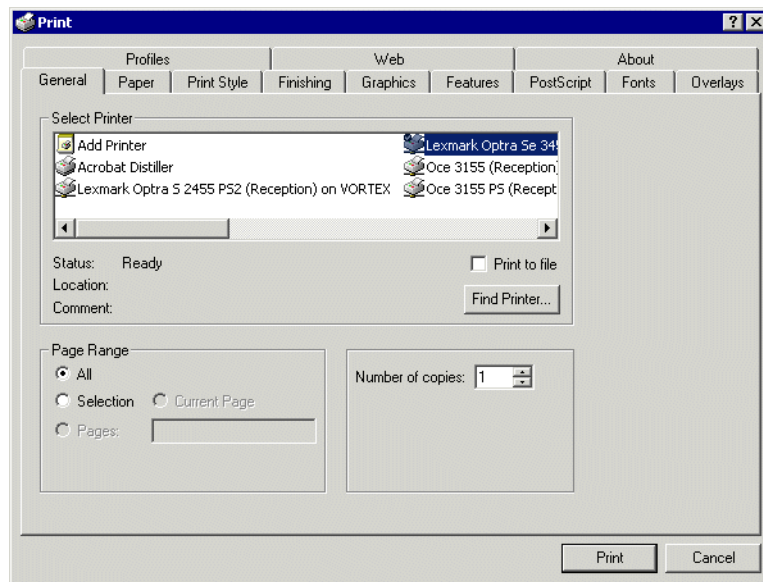
**Figure B-4. Print Labels Dialog Box**

2. Select the check box next to the type of label you want to print: **Spine Label** or **Piece Label**. Select both check boxes to print both spine labels and piece labels.
3. Add or edit information in the spine and piece label sections by placing the cursor in the field and entering information. The system automatically adjusts the text on the screen to fit the information on the appropriate label.
4. Enter the number of copies to be printed in the **Number of Copies** box. You can select any number from 1 to 999.
5. Click the **Print** button to print the labels. Otherwise, click the **Clear** button to remove all information from the spine and piece label sections or the **Close** button to close the dialog box without printing the information

Result: The labels print.

## Changing Printer Settings

Your printer settings can be changed from the Circulation module. To access the **Print** dialog box (as shown in [Figure B-5](#)), select **Print Setup** from the **File** menu.



---

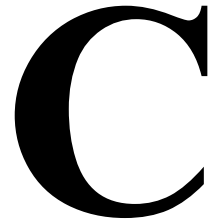
**Figure B-5. Print Dialog Box**

For more information on printer settings, see your Windows documentation.



---

# Circulation Self Check



---

## Introduction

The Voyager Circulation Self Check Module allows your patrons to quickly charge items for themselves. The patron must enter their barcode and last name before being allowed to charge out items. The module can be configured for a variety of languages from which patrons can choose on the initial screen.

---

## Purpose of This Chapter

This chapter covers the following topics:

- Setting Up Circulation Self Check
  - System Administration Settings
  - `CircSC.ini` file
- Charging Items with Self Check

---

## Setting up Self Check

To set up Voyager's Self Check, you must edit the `[Security]` stanza in the `CircSC.ini` file and configure various items in the System Administration module.

**NOTE:**

In order to run Self Check, you must edit the [Security] stanza of the CircSC.ini file.

## **System Administration Settings**

---

In the System Administration module, administrators can create a Self Check operator, a Self Check happening location, and add that location to a Master Security Profile and a Circulation Policy Definition.

Additionally, add all the locations that have items from which want the Self Check operator to circulate (locations other than the Self Check circulation happening location) to their Circulation Security Profile.

### **Creating a New Operator and Location for Self Check**

To establish a new Self Check circulation operator and Self Check location, you must start in the System Administration module.

Administrators are not required to create new Self Check operators, locations, or policies; however,

- Creating an operator allows you to differentiate your Self Check transactions from your other manually performed transactions.
- Creating a location allows you to differentiate between Self Check transactions and regular transactions at real locations.



### **Procedure C-1. Creating a New Operator and Location for Self Check and Enabling Its Use**

---

Use the following to create a new operator and location for Self Check and enable its use.

1. After logging in to the System Administration module, create an operator as follows:
  - a. Select **Security** from the list bar and click the **Operator Profiles** button.
  - b. Click the **New Operator** button.
  - c. Enter the appropriate information into each field. The first name, last name, operator ID, and password fields are required (see [Figure C-1](#)).

New Operator Profile:

Operator | Current Profiles

First Name: self M.I.

Last Name: check

ID: self Password: check

Save Cancel

**Figure C-1. Example of a Creating a Self Check Operator**

- d. Click the **Save** button to save the operator.

Result: The operator has been created.

**NOTE:**

The operator does not need to be added to a circulation security profile (or any security profile) in order to be a valid Self Check operator. See *Operator Profiles - Creating, Editing, and Deleting* in the *Voyager System Administration User's Guide* for more information on establishing operators.

2. In the System Administration module, create a location and add it to your Master Security profile. as follows
  - a. Select **System** from the list bar and click the **Locations** button.
  - b. Click the **New** button.
  - c. Enter the appropriate information into each field. The location code, location name, and owning library fields are required (see [Figure C-2](#)).

New Location:

**Code:** SC2

**Name:** Self Check 2nd Floor

Spine Label Name:

OPAC Display Name:

**Owning Library:** Law Library ☐ Suppress in OPAC

Policies:

Current Cataloging Policy Group: <None>

Current Acquisition/Serials Policy Group: <None>

Current Circulation Policy Group: <None>

Address Save Cancel

---

**Figure C-2. Example of Creating a Self Check Location**

- d. Click the **Save** button to save the location.
- e. Select **Security** from the list bar and click the **Master Profiles** button.
- f. Select a Master Profile. When configuring circulation, the locations being configured must be in the configurator's Master Profile. Click the **Edit** button.
- g. Click the **Locations** tab and move the newly-created location from the **Available Locations** list to the **Selected Locations** list.
- h. Click the **Save** button.

Result: The location has been created and added to the Master Security profile.

See *Locations and Security* in the *Voyager System Administration User's Guide* for more information on creating and editing locations, as well as adding locations to the Master Security profile.

3. Add the new location to a circulation policy group. This is required for any circulation location that you want to use as a Self Check location.
  - a. In System Administration select **Circulation** from the list bar and click the **Policy Definitions** button.
  - b. Click the **Edit** button to add the location to an existing circulation group (select the wanted group first) or click **New** to add a new circulation group for Self Check.
  - c. If you added a new circulation group, enter the name in the **Circ Group Name** field.

- d. Click the **Locations** tab and add the location to the **Selected Locations** list.
- e. Click **Settings** button to display the **Locations Settings** dialog box and enter any circulation information pertinent to this location.

**IMPORTANT:**

*To use this location as a Self Check location, you must select the check box for Circulation Location and set the shelving interval.*

- f. If you created a new circulation profile, enter information on the **Policies**, **Calendar**, **Patrons**, **Item**, and **Matrix** tabs as well. Otherwise, click the **OK** button to save the information for this location.

See Circulation Locations (Circulation Happening Locations) in the *Voyager System Administration User's Guide* for more information on establishing a location as a circulation location.

- 4. The Self Check operator is only able to check out items from locations selected in the operators Circulation Security Profile. Therefore, add item locations to the Self Check operator's Circulation Security Profile.
  - a. In System Administration, select **Security** from the list bar and click the **Circulation Profiles** button.
  - b. Click the **Edit** button to add the location to an existing circulation group (select the wanted group first) or click **New** to add a new circulation profile for Self Check.
  - c. If you added a new circulation group, enter the name in the **Circ Group Name** field.
  - d. Click the **Operators** tab and add the Self Check operator.
  - e. Click the **Locations** tab and add the locations (including the Self Check circulation happening location) where you want some activity to happen, or to circulate an item that resides there, to the **Selected Locations** list.
  - f. Select the **Charge/Renew** check box on the **Profiles** tab.
  - g. Click the **Save** button.

Result: The Circulation Security profile is complete, as are the necessary System Administration configurations.

---

## **CIRCSC.INI**

---

The `CircSC.ini` file contains the information for the Self Check module. The `CircSC.ini` file is located in the `c:\Voyager\Circulation` directory.

**NOTE:**

In order to run Self Check, you **must** edit the `[Security]` stanza; see [Security Stanza](#) on [page C-9](#). Changing any of the other settings is optional, but in order for the Self Check module to start, a login, password, and circulation location must be specified in the `[Security]` stanza.

**NOTE:**

When editing the `.ini` files, you may change any information to the right of the equals sign. However, do not change any of the text to the left of the equals sign or delete any lines or stanzas. This will cause Voyager to work improperly and may cause the system to fail. For example in the following line:

`HeadingFontName=TimesNewRoman.`

Operators may change the `TimesNewRoman` portion but not the `HeadingFontName` portion.

## **General Stanza**

---

The `[General]` stanza allows you to set various options regarding the operation of the Self Check module. A sample of this file is shown in [Figure C-3](#).

```

[[General]]
ResetTime=10
AllowExit=1
CaptionStyle=1
CaptionFontName=MS Sans Serif
CaptionFontBold=1
CaptionFontItalic=1
CaptionFontSize=24
LangCaption=Select Language
LangHelpText=Select a language from
the above list. All messages and
screen displays will appear in that
language. Then click the <NEXT>
button below.
LangNextBtnCaption=Next
LangListFontName=MS Sans Serif
LangListFontSize=18
LangListFontBold=0
LangListFontItalic=0
HelpTextFontName=MS Sans Serif
HelpTextFontSize=8.25
HelpTextFontBold=0
HelpTextFontItalic=0
PatronFontName=MS Sans Serif
PatronFontSize=18
PatronFontBold=0
PatronFontItalic=0
ItemBarcodeFontName=MS Sans Serif
ItemBarcodeFontSize=14
ItemBarcodeFontBold=0
ItemBarcodeFontItalic=0

```

**Figure C-3. Example of the General Stanza**

[Table C-1](#) describes the [General] stanza.

**Table C-1. General Stanza**

Variable	Options
ResetTime=	The number of seconds a patron will have to enter all of the information into a screen before the module will reset itself.
AllowExit=	Must be 1 or 0. 0 indicates that exiting the application will not be allowed. 1 indicates that you may exit the module by making a right-click with the mouse in a square at the bottom lefthand area of the screen (not the corner itself, but just above and to the right of the screen frame).
CaptionStyle=	Enter 0 (zero) to have the caption text for the initial screen appear normally; 1 to appear in relief; 2 to appear raised;
CaptionFontName=	Enter the name of the font in which you want the caption for the initial screen to appear.
CaptionFontBold=	Enter 1 to bold the caption text for the initial screen; enter 0 to make it appear normal.

**Table C-1. General Stanza**

<b>Variable</b>	<b>Options</b>
CaptionFontItalic=	Enter 1 to italicize the caption text for the initial screen or enter 0 to make it appear normal.
CaptionFontSize=	Enter the font size you want the caption for the initial screen to appear in.
LangCaption=	Enter the caption text for the language screen.
LangHelpText=	Enter the help text (informational text) that you want to appear in the box below the language list.
LangNextBtnCaption=	The text that you want to have appear on the button that will take you to the next screen.
LangListFontName=	The font in which you want the items in the language list to appear.
LangListFontSize=	The font size in which you want the items in the language list to appear.
LangListFontBold=	Enter 1 to bold the language list text; enter 0 to make it appear normal.
LangListFontItalic=	Enter 1 to italicize the language list text; enter 0 to make it appear normal.
HelpTextFontName=	Enter the name of the font in which you want the help text below the language list to appear.
HelpTextFontSize=	Enter the font size in which you want the help text below the language list to appear.
HelpTextFontBold=	Enter 1 to bold the help text below the language list; enter 0 to make it appear normal.
HelpTextFontItalic=	Enter 1 to italicize the help text below the language list; enter 0 to make it appear normal.
PatronFontName=	Enter the font name in which you want the text identifying the login and password fields to be displayed.
PatronFontSize=	Enter the font size in which you want the text identifying the login and password fields to be displayed.



**Table C-1. General Stanza**

Variable	Options
PatronFontBold=	Enter 1 to make the text identifying the login and password fields bold; enter 0 to make the text appear normal.
PatronFontItalic=	Enter 1 to make the text identifying the login and password fields italicized; enter 0 to make the text appear normal.
ItemBarcodeFontName=	Enter the font in which you want the text entered into the barcode field to appear.
ItemBarcodeFontSize=	Enter the font size in which you want the text entered into the barcode field to appear.
ItemBarcodeFontBold=	Enter 1 to make the text identifying the text entered into the barcode field bold; enter 0 to make the text appear normal.
ItemBarcodeFontItalic=	Enter 1 to make the text identifying the text entered into the barcode field italicized; enter 0 to make the text appear normal.

### Security Stanza

---

The [Security] stanza **must** be completed by your site in order to run the Self Check module.

The login and password entered must be that of a circulation operator. Items will not be charged to this login. The login will be used as the circulation operator who performed the transaction.

The location must be a current circulation happening location, that is a location assigned to a circulation policy that is designated as a circulation location.

It is recommended (though not required) that for the Self Check module, you set up a unique circulation operator and circulation location in order to be able to identify transactions that are performed by Self Check. The operator does not need to be added to any circulation profile.

[Figure C-4](#) shows a sample [Security] stanza.

---

```
[Security]
Login=selfcheck
Password=selfcheck
Location=schk
```

---

**Figure C-4. Example of the Security Stanza**

[Table C-2](#) describes the [Security] stanza.

**Table C-2. Security Stanza**

Variable	Options
Login=	Enter the login of a valid circulation operator.
Password=	Enter the password of a valid circulation operator.
Location=	Location code of the circulation transaction location.

### Language Stanza (Language List)

---

The [Language] stanza allows you to specify the different languages a patron can choose from. This dialog box allows the patron to choose the language in which information will appear in the rest of the Self Check module.

**NOTE:**

This display is in the Latin-1 character set.

This stanza is simply a list of languages in which you want to present information. It may have up to 50 languages specified. Each language should be entered on its own row.

[Figure C-5](#) is a sample of the [Language] stanza.

---

```
[Language]
U.S. English
Français
```

---

**Figure C-5. Example of the Language Stanza**

### Specific Language Stanza

For each language listed in the [Language] stanza you must create a unique stanza in which you can specify the text in that language for all of the screen captions, help text, field labels, and other information that will display onscreen.

Each language will have its own stanza. That stanza is named according to the EXACT text entered after the equals sign in the [Language] stanza. This means that if you enter Français in the Language stanza, you must create a stanza titled [Français]. [Francais] will not be acceptable.

#### NOTE:

If no stanza is created for a language identified in the [Language] stanza, the default language will be U.S. English.

[Table C-3](#) describes the [Language] stanza.

**Table C-3. Language Stanza**

Variable	Options
[Language Name]	In between brackets you must enter the language as entered into a row of the Language stanza. Without this, the stanza will not be used.
PatronInfoCaption=	Caption to the patron login screen. Defaults to Enter Patron Information.
PatronLastNameLabel=	Label for the field in which the patron's last name is entered. Defaults to Last Name.
PatronBarcodeLabel=	Label of the field in which the patron's barcode is entered. Defaults to Barcode.
PatronNextBtnCaption=	Text that will appear on the button that takes you to the next screen. Defaults to Next.
PatronResetBtnCaption=	Text that will appear on the button that will reset the module. Defaults to Reset.
PatronHelpText=	Information that will be displayed under the patron login fields. Defaults to Using the barcode scanner, scan the barcode located on your library identification card. The click the <NEXT> button using the mouse pointer.
ItemBarcodeCaption=	Caption for the screen where you enter the barcodes of the items to be checked out. Defaults to Enter Item Barcode.

**Table C-3. Language Stanza**

Variable	Options
ChargeLogCol1=	Title of the first column in the Charge list. Defaults to Title.
ChargeLogCol2=	Title of the second column in the Charge list. Defaults to Barcode.
ChargeLogCol3=	Title of the third column in the Charge list. Defaults to Due Date.
ChargeLogCol4=	Title of the fourth column in the Charge list. Defaults to Renewed.
FinishedBtn=	Text that will appear on the button that will reset the module. Defaults to Finished.
ItemHelpText=	Help text that appears below the charge list. Defaults to Using the barcode scanner, individually scan the barcodes of the items you would like to borrow. After an item is successfully charged to your account, the description of the item will be displayed in the charge log above. When you are finished scanning all items, use the mouse to click the <FINISHED> button.
PatronBlockClearError=	Error information. Defaults to An error occurred while trying to clear patron block messages.
PatronBlocked=	Error information. Defaults to Patron Blocked. Please go to the circulation desk for assistance.
PatronLoginNotValid=	Error information. Defaults to Patron last name or barcode not valid. Please re-enter the information or go to the circulation desk for assistance.
PatronNotFound=	Error information. Defaults to Patron barcode not found. Please re-enter the barcode or go to the circulation desk for assistance.
PatronValidationError=	Error information. Defaults to A system error has occurred in the circulation server. Unable to validate patron barcode.
ItemBlockClearError=	Error information. Defaults to An error occurred while trying to clear item blocks.

**Table C-3. Language Stanza**

<b>Variable</b>	<b>Options</b>
ItemBlocked=	Error information. Defaults to Item Blocked. Please go to the circulation desk for assistance.
MultipleItems=	Error information. Defaults to Unable to Complete the Transaction. The item barcode is linked to multiple items. Please take this item to the circulation desk for assistance.
ItemChargeError=	Error information. Defaults to A system error occurred while attempting to process this transaction.
InadequateCalendar=	Error information. Defaults to Unable to complete the transaction due to an inadequate system calendar. Please take this item to the circulation desk for assistance.
ItemNotFound=	Error information. Defaults to Item not found. Please re-enter the item barcode or take this item to the circulation desk for assistance.
DueSlipHeading=	Title printed at the top of the due date slip. Defaults to ITEM CHARGED.
DueSlipPatronLabel=	Label printed beside the name of the patron charging the item. Defaults to Patron.
DueSlipPatronBarcodeLabel=	Label printed beside the barcode of the patron charging the item. Defaults to Patron Barcode.
DueSlipPatronGroupLabel=	Label printed beside the patron group of the patron charging the item. Defaults to Patron Group.
DueSlipDueDateLabel=	Label printed beside the due date of the item. Defaults to Due Date.
DueSlipTitleLabel=	Label printed beside the title of the item. Defaults to Title.
DueSlipAuthorLabel=	Label printed beside the author of the item. Defaults to Author.
DueSlipItemBarcodeLabel=	Label printed beside the barcode of the item. Defaults to Item Barcode.

## Due Date Slip Stanza

---

The [Due Date Slip] stanza defines the default settings for due date slips. If a patron group does not have a customized due date slip, the slips will follow this format.

[Figure C-6](#) shows the [Due Date Slip] stanza.

```
[DUE DATE SLIP]
PrintDueDateSlips=Y
HeadingFontName=Times New Roman
HeadingFontSize=12
HeadingFontBold=True
HeadingFontItalic=False
HeadingFontUnderline=False
HeadingJustified=C
LabelFontName=Times New Roman
LabelFontSize=12
LabelFontBold=True
LabelFontItalic=False
LabelFontUnderline=False
TextFontName=Times New Roman
TextFontSize=12
TextFontBold=False
TextFontItalic=False
TextFontUnderline=False
TextLeftMargin=3
PageMargins=1
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
```

---

**Figure C-6. Example of the Due Date Slip**

[Table C-4](#) describes the [Due Date Slip] stanza.

**Table C-4. Due Date Slip Stanza**

Variable	Options
PrintDueDateSlips=	Enter Y to print due date slips for each charge; enter N to prevent due date slip printing.
HeadingFontName=	must be a font name as it appears in your system's Fonts folder.
HeadingFontSize=	numeric size, in points
HeadingFontBold=	Enter True after the equals sign to get boldface text, enter False to get plain text.
HeadingFontItalic=	Enter True after the equals sign to get italic text; enter False to get plain text.
HeadingFontUnderline=	Enter True after the equals sign to get underlined text; enter False to get plain text.

**Table C-4. Due Date Slip Stanza**

Variable	Options
HeadingJustified=	Enter C for centered text, L for left-justified text, or R for right-justified text.
LabelFontName=	See HeadingFontName.
LabelFontSize=	See HeadingFontSize.
LabelFontBold=	See HeadingFontBold.
LabelFontItalic=	See HeadingFontItalic
LabelFontUnderline=	See HeadingFontUnderline.
TextFontName=	See HeadingFontName.
TextFontSize=	See HeadingFontSize.
TextFontBold=	See HeadingFontBold.
TextFontItalic=	See HeadingFontItalic
TextFontUnderline=	See HeadingFontUnderline.
TextLeftMargin=	Enter (in inches) the left margin for the text.
PageMargins=	Enter (in inches) the margins at the top, left, right, and bottom of the page.
BlankLinesBetweenSections=	Enter the number of blank lines to appear between sections.
PrintPatronName=	Enter Y to print the patron's name, or N to not print the name.
PrintPatronBarcode=	Enter Y to print the patron's barcode, or N to not print the barcode.
PrintPatronGroup=	Enter Y to print the patron's Patron Group, or N to not print the Patron Group.

[Figure C-7](#) on pages C-16 through C-21 show a sample `CircSC.ini` file.

### Sample CircSC.ini File

---

```
[General]
ResetTime=100
AllowExit=1
CaptionStyle=1
CaptionFontName=MS Sans Serif
CaptionFontBold=1
CaptionFontItalic=1
CaptionFontSize=24
LangCaption=Select Language
LangHelpText=Select a language from the above list. All
messages and screen displays will appear in that
language. Then click the <NEXT> button below.
LangNextBtnCaption=Next
LangListFontName=MS Sans Serif
LangListFontSize=18
LangListFontBold=0
LangListFontItalic=0
HelpTextFontName=MS Sans Serif
HelpTextFontSize=8.25
HelpTextFontBold=0
HelpTextFontItalic=0
PatronFontName=MS Sans Serif
PatronFontSize=18
PatronFontBold=0
PatronFontItalic=0
ItemBarcodeFontName=MS Sans Serif
ItemBarcodeFontSize=14
ItemBarcodeFontBold=0
ItemBarcodeFontItalic=0
```



## [Security]

Login=CircSCOperator

Password=SCOp

Location=CircSelfCheck

## [Language]

U.S. English

Français

## [U.S. English]

PatronInfoCaption=Enter Patron Information

PatronLastNameLabel=Last Name:

PatronBarcodeLabel=Barcode:

PatronNextBtnCaption=Next

PatronResetBtnCaption=Reset

PatronHelpText=Using the barcode scanner, scan the barcode located on your library identification card. The click the <NEXT> button using the mouse pointer.

ItemBarcodeCaption=Enter Item Barcode

ChargeLogCol1=Title

ChargeLogCol2=Barcode

ChargeLogCol3=Due Date

ChargeLogCol4=Renewed

FinishedBtn=Finished

ItemHelpText=Using the barcode scanner, individually scan the barcodes of the items you would like to borrow. After an item is successfully charged to your account, the description of the item will be displayed in the charge log above. When you are finished scanning all items, use the mouse to click the <FINISHED> button.

PatronBlockClearError=An error occurred while trying to clear patron block messages.

PatronBlocked=Patron Blocked. Please go to the circulation desk for assistance.

PatronLoginNotValid=Patron last name or barcode not valid. Please re-enter the information or go to the circulation desk for assistance.

PatronNotFound=Patron barcode not found. Please re-enter the barcode or go to the circulation desk for assistance.

PatronValidationError=A system error has occurred in the circulation server. Unable to validate patron barcode.

ItemBlockClearError=An error occurred while trying to clear item blocks.

ItemBlocked=Item Blocked. Please go to the circulation desk for assistance.

MultipleItems=Unable to Complete the Transaction. The item barcode is linked to multiple items. Please take this item to the circulation desk for assistance.

ItemChargeError=A system error occurred while attempting to process this transaction.

InadequateCalendar=Unable to complete the transaction due to an inadequate system calendar. Please take this item to the circulation desk for assistance.

ItemNotFound=Item not found. Please re-enter the item barcode or take this item to the circulation desk for assistance.

DueSlipHeading=ITEM CHARGED

DueSlipPatronLabel=Patron:

DueSlipPatronBarcodeLabel=Patron Barcode:

DueSlipPatronGroupLabel=Patron Group:

DueSlipDueDateLabel=Due Date:

DueSlipTitleLabel=Title:

DueSlipAuthorLabel=Author:

DueSlipItemBarcodeLabel=Item Barcode:

[Français]

PatronInfoCaption=Entre Info de Patron

PatronLastNameLabel=(French)Last Name:

PatronBarcodeLabel=(French)Barcode:  
PatronNextBtnCaption=Suivant  
PatronResetBtnCaption=Ressette  
ItemBarcodeCaption=Entre ID de Item  
ChargeLogCol1=Title  
ChargeLogCol2=Id de Item  
ChargeLogCol3=Due Date  
ChargeLogCol4=Renewed  
FinishedBtn=Fin  
  
PatronBlockClearError=(French)An error occurred while trying to clear patron block messages.  
  
PatronBlocked=(French)Patron Blocked. Please go to the circulation desk for assistance.  
  
PatronLoginNotValid=(French)Patron last name or barcode not valid. Please re-enter the information or go to the circulation desk for assistance.  
  
PatronNotFound=(French)Patron barcode not found. Please re-enter the barcode or go to the circulation desk for assistance.  
  
PatronValidationError=(French)A system error has occurred in the circulation server. Unable to validate patron barcode.  
  
ItemBlockClearError=(French)An error occurred while trying to clear item blocks.  
  
ItemBlocked=(French)Item Blocked. Please go to the circulation desk for assistance.  
  
MultipleItems=(French)Unable to Complete the Transaction. The item barcode is linked to multiple items. Please take this item to the circulation desk for assistance.  
  
ItemChargeError=(French)A system error occurred while attempting to process this transaction.  
  
InadequateCalendar=(French)Unable to complete the transaction due to an inadequate system calendar. Please take this item to the circulation desk for assistance.

ItemNotFound=(French)Item not found. Please re-enter the item barcode or take this item to the circulation desk for assistance.

DueSlipHeading=(French)ITEM CHARGED

DueSlipPatronLabel=(French)Patron:

DueSlipPatronBarcodeLabel=(French)Patron Barcode:

DueSlipPatronGroupLabel=(French)Patron Group:

DueSlipDueDateLabel=(French)Due Date:

DueSlipTitleLabel=(French)Title:

DueSlipAuthorLabel=(French)Author:

DueSlipItemBarcodeLabel=(French)Item Barcode:

[DUE DATE SLIP]

PrintDueDateSlips=Y

HeadingFontName=Times New Roman

HeadingFontSize=12

HeadingFontBold=True

HeadingFontItalic=False

HeadingFontUnderline=False

HeadingJustified=C

LabelFontName=Times New Roman

LabelFontSize=12

LabelFontBold=True

LabelFontItalic=False

LabelFontUnderline=False

TextFontName=Times New Roman

TextFontSize=12

TextFontBold=False

TextFontItalic=False

TextFontUnderline=False

TextLeftMargin=3

```
PageMargins=1
BlankLinesBetweenSections=2
PrintPatronName=Y
PrintPatronBarcode=Y
PrintPatronGroup=Y
```

---

**Figure C-7. Sample CircSC.ini file**

## **Charging Items with Self Check**

---

Open the Self Check module. If there are multiple languages installed, the initial screen will be the language selection screen. If there is only one language installed, the patron login screen will appear.

The Self Check module automatically resets after the number of seconds specified by the **ResetTime** key in the [General] stanza of the CircSC.ini file. If nothing is entered and either the return key is pressed or the **Next** button is clicked, the module will reset to the initial screen.



### **Procedure C-2. Charging an Item**

---

Use the following to charge an item:

1. Choose a language from the list on the screen and either press **Return** or click the **Next** button.

Result: The **Patron Information** screen displays.

**NOTE:**

If only one language is installed, the language screen will not display and when the module resets itself, it will return to the patron login screen.

2. Type or scan the patron's barcode in the **Barcode** field and the patron's last name in the **Last Name** field, and then press **Return** or click the **Next** button.

Result: If the barcode and name pass validation for circulating items, the charge screen will display.

If the barcode or name is incorrect or missing, an error message **Patron barcode not found**. Please re-enter the barcode or go to the circulation desk for assistance **displays**.

3. Click **OK** and the **Patron Information** screen displays.
4. Enter or scan the item's barcode into the **Item Barcode** field, and then select the check box or press **Return** to charge the item to the patron.

Result: After the item has been charged, it will be displayed in the charge activity log on screen.

5. When you are finished, click the **Finished** button or simply wait for the module to reset itself.

Result: The module clears the patron's barcode and last name and return to the initial screen.

**NOTE:**

To exit the module, you must right-click the mouse in a hidden square at the bottom area of the screen (not the corner itself, but just above and to the right of the screen frame). Exiting is only allowed if **AllowExit** in the [General] Stanza is set to 1. If you want to disable the button in order to prevent exiting of the module, **AllowExit** must be set to zero (0).

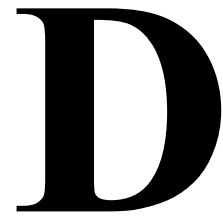
**NOTE:**

Without any other safeguards to secure the computer, other ways can be found to close or circumvent the self-check application. Your institution should establish safeguards on the computer that will be running Self Check to avoid any security problems (for example, running the Self Check module in a secure shell). In order to fully prevent closing of the Circulation Self Check module or in order to close an already secured Circulation Self Check module, talk to your server administrator for more information.

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## Demerits



---

### Introduction

Voyager's Demerit functionality allows operators to perform the following tasks:

- Assess demerit points instead of monetary fines for patrons who have overdue items.
- Suspend circulation privileges if a threshold number of demerits is reached.
- Manually suspend a patron's circulation privileges.
- Calculate accrued fines or demerits, prior to an item being discharged.



**IMPORTANT:**

*Sites must determine if they want to assess fines or demerits as a penalty for overdue items. Sites will not be able to do both.*

This functionality will work well for sites who do not charge patrons fines for overdue items, but who want to impose a non-monetary penalty.

If your site currently charges for overdue items, switching to assessing demerits is technically possible, but not suggested. The problem with switching is possibly having a mixture of fines and demerits in the database, unless you undertake a project to pay all fines prior to implementing demerits. Existing fines do not turn into demerits. The worst consequence could occur with the accrued fine/demerit job (Circjob 30). Once this job is run, multiple punishment currencies can result in accrued fines/demerits that cannot be deleted.

Libraries that assess demerits will still have the ability to assess monetary penalties for lost item fees and replacement costs.

Libraries that do not assess demerits can still take advantage of manually blocking a particular patron's circulation privileges, as well as, calculating accrued fines, for overdue but not yet discharged items.

## **Purpose of This Chapter**

---

This chapter will provide detailed information about the following functionalities:

- Demerits functionality, including definitions of terms, overview of functionality, module workspaces, dialog boxes, fields, and messages, and decisions to be made when implementing Demerits
- How to enable and configure Demerits functionality, including the System Administration settings, WebVoyage settings and the `exceptdates.cfg` file
- Circulation batch jobs needed for Demerits functionality
- Circulation module activity, including how to post/add demerits, manually apply a suspension, and edit patron suspensions.

## **Demerits**

---

This section includes sections covering definitions of terms used in Demerits, overview of Demerits functionality, Demerits module dialog boxes, fields, and messages, and decisions to be made when implementing demerits.

### **Definition of Terms**

---

This section covers the terms used in Demerits.

#### **Demerit**

A demerit is a non-monetary penalty for overdue items. It is used in lieu of a monetary fine.

#### **Accrued Demerits/Fines**

Accrued demerits and fines are those penalties (either the number of demerits, or the fine amount) that would be assessed if the overdue item was discharged immediately.



**Suspension**

A suspension is a patron level block that prevents all circulation transactions, including requests. It can be automatically applied using circulation batch job 31 or manually applied.

**Exception Dates**

Exception dates are specific dates to which the suspension period should not apply. These exception dates are determined by the library.

**Circjob 30: Accrued Fines and Demerits**

This circulation batch job calculates the accrued demerits or accrued fine for currently overdue items.

**Circjob 31: Patron Suspension**

This circulation batch job places a patron record in suspension if the threshold for demerits is met.

**Circjob 37: Forgive Demerits**

This circulation batch job forgives an eligible patron's actual demerits.

**Overview of Demerits Functionality**

---

Voyager's Demerits functionality allows a site to block and suspend a patron's circulation abilities for a defined period of time based on the patron reaching (or exceeding) a set number of demerits, called the maximum demerit threshold.

Demerit points are used as a penalty for overdue items, instead of a fine. There is a specific number of demerits assessed each day that an item is overdue, depending on the patron group and item type combination.

Two circulation batch jobs, Accrued Fines/Demerits and Patron Suspension, should be run daily, using either the server or the WebAdmin program. The former job determines accrued fines/demerits. The latter job automatically suspends a patron record's circulation activity if the threshold is reached or exceeded.

When a patron reaches or exceeds the maximum demerit threshold, but has not yet returned the overdue item, the patron will be blocked from circulation activity. Once the overdue item is returned, one or more suspensions will be applied to patron record, based on the number of demerit points the patron has.

Suspensions apply to an entire patron record. Therefore, if a patron is a member of more than one patron group, circulation activity is suspended for all patron groups.

Notification that a patron is suspended occurs by verbal notification at a Circulation desk when attempting some circulation activity, or when a patron accesses his or her patron information record using WebVoyage. In this case a message stating they are suspended displays. There is no e-mail or mailed notice.

Circulation users with appropriate security, that is, the ability to override the patron is suspended block, can modify the suspension period as well as manually suspend a patron's circulation privileges.

### **Module Workspaces, Dialog boxes, Fields, and Messages Used in Demerits**

---

This section discusses the following information:

- Workspaces and dialog boxes seen in the System Administration and Circulation modules related to Demerits functionality and their fields.
- Messages that display to circulation users in the circulation module.
- Messages that display to patrons in WebVoyage.

### **System Administration Module Workspaces, Dialog Boxes and Fields**

The System Administration module's **Circulation- Miscellaneous** workspace includes the **Use Demerits** and **Display Demerits** fields (as shown in [Figure D-1](#)).

**Circulation - Miscellaneous**

Edit Miscellaneous:

- ☒ Email Fine/Fee Notice
- ☒ Email Statement of Fines/Fees
- ☐ Allow UB Pick-Ups From Holding Library
- ☒ Use Demerits
- ☒ Display Demerits
- ☐ Stop Fines/Fees, Notices for Claims Returned Items
- ☒ Allow Deletion of Patron With Historical Fines

Short Loan time buffer:  minutes

**Figure D-1. Circulation - Miscellaneous Workspace**

[Table D-1](#) describes the Demerits related fields on the **Circulation - Miscellaneous** workspace. See *Circulation - Miscellaneous* in the *Voyager System Administration User's Guide* for additional information.

**Table D-1. Demerits Related Fields on the Circulation - Miscellaneous Workspace**

Name	Description	Required	Range
Use Demerits check box	Enables the Demerits functionality.	No	Check box The default is not selected.
Display Demerits check box	Enables the Demerits tabs to display in the Circulation module.  Available only if Use Demerits is selected.	No	Check box The default is not selected.

The **Circulation - Patron Groups** workspace includes the **Demerits Apply** check box, **Max Demerit**, and **Suspension Days** fields (see [Figure D-2](#)).

The screenshot shows the 'Circulation - Patron Groups' workspace. At the top, there is a table with two columns: 'Codes' and 'Names'. The table lists several patron groups: CC (Courtesy Patron), FAC (Faculty), GRAD (Graduate Student), ILL (Inter-Library Loan), and ST (Staff). The 'GRAD' group is selected. To the right of the table are three buttons: 'New', 'Edit', and 'Delete'. Below the table is an 'Edit Patron Group' form. The form contains the following fields: 'Code' (set to GRAD), 'Name' (set to Graduate Student), 'Display Name' (set to Graduate Student), a checkbox for 'Display OPAC Messages for charged Items' (unchecked), a checkbox for 'Demerits Apply' (checked), 'Max Demerits' (set to 100), and 'Suspension Days' (set to 10). At the bottom of the form are 'Save' and 'Cancel' buttons.

**Figure D-2. Circulation - Patron Group Workspace**

[Table D-2](#) describes the Demerits related fields on the **Circulation - Patron Groups** workspace. See *Patron Groups* in the *Voyager System Administration User's Guide* for additional information.

**Table D-2. Demerits Related Fields on the Circulation - Patron Groups Workspace**

Name	Description	Required	Range
Demerits Apply check box	Enables demerits to be assessed to the particular patron group.	No  Only available if the Use Demerits check box is selected in Circulation - Miscellaneous.	Check box  The default is not selected.
Max Demerit	Threshold number of demerits which, if reached or exceeded, will allow blocks or suspension.	No  Only available if the Demerits Apply check box is selected.	0.01-999.99 demerits  The default is blank.
Suspension Days	Number of days patron will be suspended.	No  Only available if the Demerits Apply check box is selected.	1-999 days  The default is blank.

The **Settings** tab of the **Circulation Policy Matrix Record Settings** dialog box includes Demerit rate information (see [Figure D-3](#)).

The screenshot shows the 'Circulation Policy Matrix Record Settings' dialog box with the 'Settings' tab selected. The 'Patron Group' is set to 'Courtesy Patron' and 'Item Type' is 'book'. The 'Settings' tab contains various configuration options for circulation policies, including checkboxes for 'Charge/Renew', 'Recall', 'Hold', and 'Call Slip'. Below these are input fields for 'Loan Period' (21 days), 'Renewal Period' (21 days), 'Max # of Sequential Renewals' (2), 'Fine Interval' (Day), 'Demerits' (0.15), 'Max Demerits' (10.00), 'Max Recall Demerits' (10.00), 'Min Loan Period for Recalled Items' (10 days), 'Recall Fine Interval' (Day), 'Recall Demerits' (0.25), 'Grace Period' (3 days), 'Recall Return Interval' (5 days), and 'Recall Grace Period' (3 days). At the bottom, there are radio buttons for 'Renew From' with 'Original Due Date' selected and 'Renewal Date' as an option. 'OK' and 'Cancel' buttons are at the bottom right.

**Figure D-3. Circulation Policy Matrix Record Settings**

See *Add - Circulation Policy Matrix Record Settings Dialog Box* in the *Voyager System Administration User's Guide* for information about the **Intervals** tab.

[Table D-3](#) describes the Demerits related fields on the **Settings** tab of the **Circulation Policy Matrix Record Settings** dialog box.

**Table D-3. Demerits Related Fields on the Circulation Policy Matrix Record Settings Dialog Box**

Name	Description	Required	Range
Demerits	<p>Number of demerits that will be assessed each day/hour/minute that the item is overdue.</p> <p>The demerit points are applied to a patron's record when the overdue item is discharged.</p> <p>If the total amount of the fine exceeds the designated Maximum Demerit Amount, the Maximum Demerit Amount is applied instead.</p>		<p>0.00 - 999.99 demerits.</p> <p>Use 00.00 for any Patron Group/Item Type combination where you do not impose overdue fines.</p>
Max Demerits	<p>Maximum number of demerits that would be assessed for any one overdue situation.</p> <p>It is equivalent to a cap on the demerit amount.</p> <p>Leave blank if you do not limit the amount charged for an overdue item.</p>	No	<p>0.01 - 999.99 demerits.</p> <p>The default is blank.</p>
Recall Demerits	<p>Number of demerits that will be assessed each day/hour/minute (recall interval) that the recalled item is overdue.</p> <p>The demerits are applied to a patron's record when the overdue recalled item is discharged.</p> <p>If the total amount of the fine exceeds the designated Maximum Recall Demerit Amount, the Maximum Recall Demerit Amount is applied instead.</p>	<p>No</p> <p>Disabled if this is a Short loan Item Type.</p>	<p>00.00-999.99</p> <p>Use 00.00 for any Patron Group/Item Type combination where you do not impose overdue recall fines.</p> <p>The default is blank.</p>

**Table D-3. Demerits Related Fields on the Circulation Policy Matrix Record Settings Dialog Box**

Name	Description	Required	Range
Max Recall Demerits	<p>Maximum number of demerits charged to the patron for any one overdue recall situation.</p> <p>Leave blank if you do not limit the amount charged for a recalled overdue item.</p> <p>It is equivalent to a cap on the demerit amount.</p>	<p>No</p> <p>Disabled if this is a Short loan Item Type.</p>	<p>0.01 - 999.99 demerits.</p> <p>The default is blank.</p>

See *Add - Circulation Policy Matrix Record Settings Dialog Box* in the *Voyager System Administration User's Guide* for additional information.

The **System - Fine/Fee Reasons** workspace includes three fine/fee reasons relating to demerits. They are accrued fine, accrued demerit, and demerit. Their corresponding Fine\_Fee\_Type values are **F8**, **F9**, and **F10**, respectively (see [Figure D-4](#)).

**NOTE:**

If sites had created fine/fee reasons in addition to the distributed Voyager fine/fee reasons, a script will be run at upgrade that will insert the new fine/fee reasons, accrued fine (F8), accrued demerit (F9), and demerit (F10) ahead of the user-defined reasons. Anything that previously occupied these IDs will have a new code. For example, if the site had previously defined photocopy charge with code F8, after the script is run, the fine/fee reason accrued fine will have the F8 code, and the photocopy charge will have a new code. Sites should look at and change as appropriate.

**System - Fines/Fees**

**Fine Fee** | **Payment**

Codes	Names
F7	Lost Equipment Processing
F8	Accrued Fine
<b>F9</b>	<b>Accrued Demerit</b>
RenameF10	Damaged
RenameF8	ILL Fee

New Edit Delete

Edit Fine Fee Reason:

Code:

Name:

Save Cancel

**Figure D-4. System Administration System - Fine/Fee Reasons**

[Table D-4](#) describes the Demerits related fields on the **System - Fine Fee Reasons** workspace. See *Fine/Fees* in the *Voyager System Administration User's Guide* for additional information.

**Table D-4. Demerits related fields on the Circulation - Patron Groups Workspace**

Name	Description
Fine/fee reason tab	Reasons and their associated codes are: <ul style="list-style-type: none"> <li>• Accrued Fine (F8)</li> <li>• Accrued Demerit (F9)</li> <li>• Demerit (F10)</li> </ul>

### Circulation Module Dialog Boxes and Fields

In the Circulation module the **Patron Information** dialog box contains two tabs that relate to demerit information: Outstanding Demerits and Demerits History. Additionally, this is where the circulation user can edit demerit and suspension information.

Brief fine and demerit information display below the fines/fees icon on the Patron Record (as shown in [Figure D-5](#)) . It displays any fine amount followed by a slash and the number of demerits.



UB Patron 353 (Patron ID 341 at American Business College)

Last: Patron  
First: A.  
Middle:   
Title:   
Name Type: Personal  
Entered At: Circulation Desk

0 \$49.10 / 118.10 0/0  
0 945 / 146 / 69 0


Patron Id	Address/Phone	Counters	Progy Patrons	History
Barcode	Patron Group	Status/Date	Operator Id	
52	Graduate Student	Active - 8/12/2002	SYS-UB	

Institution Id: 1000092 SSN:

**Figure D-5. Patron Record Fines/Fees Shows \$49.10 in Fines and 118.10 Demerits**

When clicking on the **Fines/Fees** button, the **Patron fine/fees** dialog box, which includes the **Outstanding Demerits** tab and the **Demerits History** tab opens (as shown in [Figure D-6](#)).

**Patron Fines/Fees**

 Julie Bister

Fines, Fees and Demerits for Location:

Date	Title	Barcode	Fee/Posting Type	Fee	Posting	Balance	Location
6/24/2005 01:38 PM	Blue estu	11166	Demerit	50.00		50.00	Circulation De

**Total demerits displayed** 50.00

**Total Demerits** 50.00

Description:

---


**Figure D-6. Patron Fines/Fees Outstanding Demerits Tab**

These tabs are populated by running various circulation batch jobs that are discussed later in this chapter. [Table D-5](#) describes the **Outstanding Demerits** and **Demerits History** tabs.

**Table D-5. Fields on the Outstanding Demerits and Demerits History Tabs**

Name	Description
Name	Name of the patron.
Fines, Fees and Demerits for Location	<p>Drop-down list of all the circulation locations within the user's cluster. These are sorted alphabetically after an All Locations option.</p> <p>If the Use Active Circulation Location as the Default Fines/Fees Filter check box (see <a href="#">Table 13-3</a> on <a href="#">page 13-6</a>) is selected, the active circulation is the selected entry. Otherwise, All Locations is selected.</p> <p><b>NOTE:</b> Circulation desks that are not part of the users security profile are included in this list.</p> <p>See <a href="#">Fines, Fees and Demerits for Location</a> on <a href="#">page 4-91</a> for more information.</p>
Date	Date of transaction.
Title	Title of the item.
Barcode	Barcode of the item from the Item Record.
Fee/Posting type	<p>Fine/Fee reason:</p> <ul style="list-style-type: none"> <li>• Accrued Demerit or</li> <li>• Demerit</li> </ul>
Fee	Amount of demerits assessed for this item.
Posting	Number of demerits forgiven or errored out.
Balance	Balance.
Location	Location where the fine or fee was assessed.
Total fines displayed	Total amount of displayed demerits/fees for the patron. The patron may have additional fines/fees that do not display.
Total Due	<p>Total amount of all demerits/fees for the patron.</p> <p><b>NOTE:</b> This includes all fines/fees, that is those displayed and those not displayed.</p>
Description box	For any selected item, additional information may be seen in the description box.

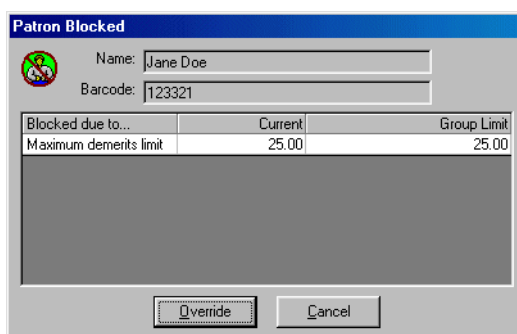
**Table D-5. Fields on the Outstanding Demerits and Demerits History Tabs**

Name	Description
Information box	<p>For any selected item, this additional information displays.</p> <ul style="list-style-type: none"><li>• Charge date</li><li>• Due date</li><li>• Discharge Date</li></ul> <p> <b>IMPORTANT:</b> <i>This is the date that the item is returned/ discharged. This date may be different from the fine/fee/demerit creation date if the discharge date is backdated.</i></p> <ul style="list-style-type: none"><li>• Operator</li><li>• Location</li></ul>
Item info button	Displays the item record for the selected title.
Print	Prints all of the information on the tab selected.
Add	Invokes the Add Demerits dialog box.
Post	Invokes the Post Against Fines/Fees dialog box. Only forgive or error are posting types.
Close	Closes the Patron Fines/Fees dialog box.

See [Patron Fines/Fees](#) on [page 4-86](#) for more information.

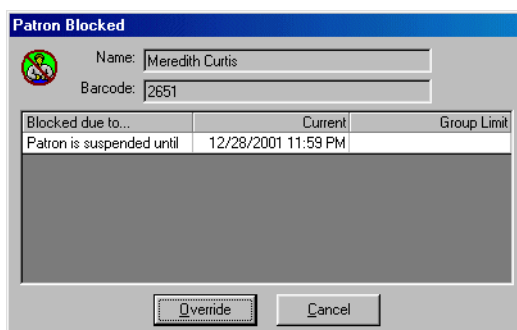
### Circulation Module Messages Regarding Demerits

When a patron is blocked indefinitely because their total of accrued demerits and real demerits meets or exceeds the patron group's max threshold, the **Patron Blocked** dialog box opens with the message `Blocked Due To ... Maximum demerits limit`, which includes the current demerits total, the patron group limit, and the **Override** (or **Supervisor**) and **Cancel** buttons (see [Figure D-7](#)).



**Figure D-7. Patron Blocked Due to Maximum Demerits Limit Message**

When a patron has been suspended the **Patron Blocked** dialog box opens with the message Blocked Due To ... Patron is suspended until and the end date of the suspension (see [Figure D-8](#)).

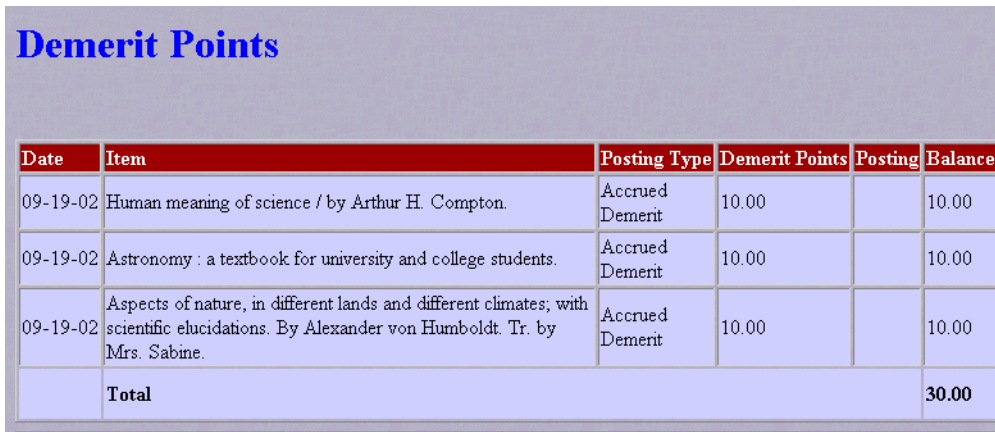


**Figure D-8. Patron Blocked Due to Suspension Message**

### WebVoyáge Messages Regarding Demerits

In WebVoyáge demerits information is seen when accessing the patron information page.

There is a Demerit Points section which displays demerits assessed against a patron's record (see [Figure D-9](#)).



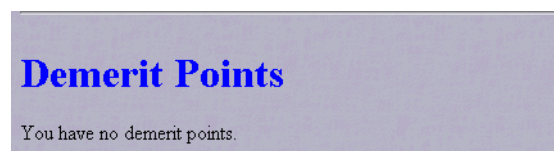
Date	Item	Posting Type	Demerit Points	Posting	Balance
09-19-02	Human meaning of science / by Arthur H. Compton.	Accrued Demerit	10.00		10.00
09-19-02	Astronomy : a textbook for university and college students.	Accrued Demerit	10.00		10.00
09-19-02	Aspects of nature, in different lands and different climates; with scientific elucidations. By Alexander von Humboldt. Tr. by Mrs. Sabine.	Accrued Demerit	10.00		10.00
<b>Total</b>					<b>30.00</b>

---

**Figure D-9. Demerit Information Displayed in WebVoyage**

If a patron does not have any demerits, a no demerits points message displays (see [Figure D-10](#)).

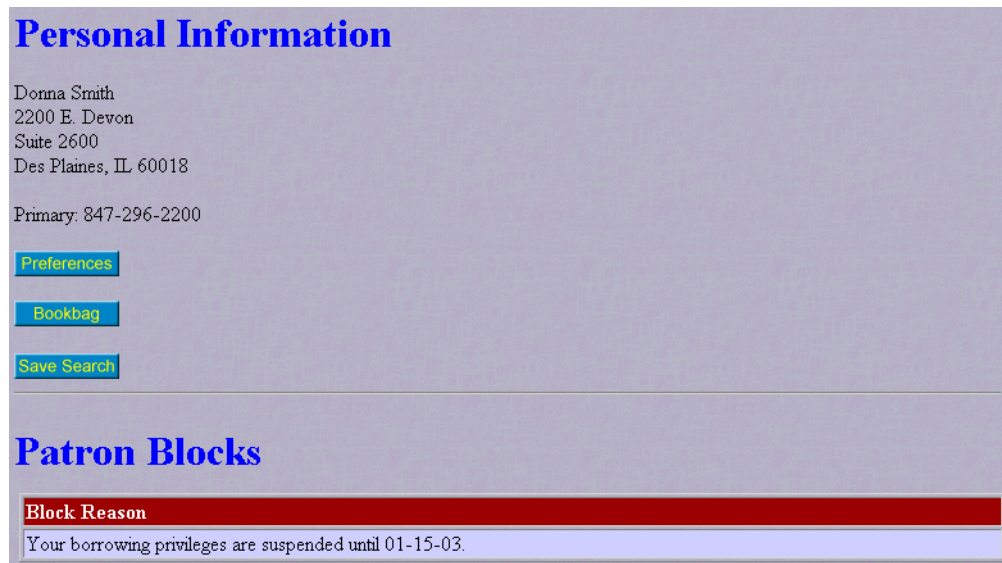
---



---

**Figure D-10. No Demerits Message Display in WebVoyage**

If the patron's circulation privileges have been suspended a message will display immediately after the personal information section, followed by the suspension date (see [Figure D-11](#)).



**Personal Information**

Donna Smith  
 2200 E. Devon  
 Suite 2600  
 Des Plaines, IL 60018

Primary: 847-296-2200

[Preferences](#)

[Bookbag](#)

[Save Search](#)

**Patron Blocks**

**Block Reason**

Your borrowing privileges are suspended until 01-15-03.

**Figure D-11. Patron Suspended Message**

The `Suspended Until` message may be displayed in conjunction with the `No Demerits` message.

Additionally, if a Patron is suspended or blocked and they attempt any circulation activity using WebVoyage, such as making a request, the message `You have no requests available on this database` displays and the activity is not allowed.

### Defining How to Implement Demerits

If a site chooses to implement the Demerits feature, additional decisions must be made to define the parameters under which Demerits will function. Questions about patron groups, maximum thresholds, suspension length, and specific penalties for patron group-item type combinations must be addressed as follows:

1. Determine the patron group(s) to which Demerits apply. Since Demerits are applied at the patron group level, sites can pick and choose among their patron groups. For example, perhaps Demerits apply to student patron groups, but not a staff patron group.

2. Determine the number of demerits a patron must have to invoke the suspension period. This too is defined at the patron group level allowing different groups to have different threshold numbers before suspending their circulation privileges.
3. Determine the length of the suspension period (in days) that circulation activity is to be blocked for each patron group. Remember that with proper security suspension dates can be modified.
4. Determine any exception dates to which the suspension period should not apply. This allows a site to prevent patrons from serving their suspensions during vacation periods or when they would not normally be using the library services.
5. Determine a demerit rate for each patron group/item type combination. For example, for an undergraduate student with an overdue book assess two demerits a day, however for an undergraduate with an overdue CD, assess five demerits each day it remains overdue.

## **Enabling and Configuring Demerits**

---

This section provides the step-by-step procedures for enabling and configuring Demerits functionality. This includes the System Administration module settings, WebVoyage settings (`opac.ini` file) and creating an `exceptdates.cfg` file.

### **System Administration Settings**

---

Specific settings in the System Administration module allow the site to enable the use of demerits, set up the parameters at the patron group level that are to govern demerits functionality, and set up the parameters at the patron group/item type level that further govern demerits functionality.



#### **Procedure D-1. Enabling Demerits in the Circulation - Miscellaneous Workspace**

---

Use the following to enable demerits in the System Administration module:

1. After logging in to the System Administration module, click the **Miscellaneous** button from the Circulation list bar.

Result: The **Circulation - Miscellaneous** workspace opens.

2. Select the **Use Demerits** check box.



3. To display the demerit tabs in the Circulation module, select the **Display Demerits** check box (see [Figure D-12](#)).

**Circulation - Miscellaneous**

Edit Miscellaneous:

- ☒ Email Fine/Fee Notice
- ☒ Email Statement of Fines/Fees
- ☐ Allow UB Pick-Ups From Holding Library
- ☒ Use Demerits
- ☒ Display Demerits
- ☐ Stop Fines/Fees, Notices for Claims Returned Items
- ☒ Allow Deletion of Patron With Historical Fines

Short Loan time buffer:  minutes

**Figure D-12. Circulation - Miscellaneous Workspace**

**NOTE:**

The **Display Demerits** check box is only available for selecting if the **Use Demerits** check box is selected.



**Procedure D-2. Setting Up Demerits Parameters for Patron Groups**

Use the following to set up the Demerit parameters for patron groups:

1. After logging in to the System Administration module, click the **Patron Groups** button from the Circulation list bar.

Result: The **Circulation - Patron Groups** workspace opens.

2. Select the Patron Group to which you want to apply demerits by selecting the group and then clicking on the **Edit Patron Group** button.
3. In the **Edit Patron group** section
  - a. Select the **Demerits Apply** check box.
  - b. Enter the number of demerits in the **Max Demerits** field.

- c. Enter the number of days from in the **Suspension Days** field that you want the patron to be suspended from circulation activities (see [Figure D-13](#)).
- 

Codes	Names
CC	Courtesy Patron
FAC	Faculty
GRAD	Graduate Student
ILL	Inter-Library Loan
ST	Staff

Edit Patron Group:

Code: GRAD

Name: Graduate Student

Display Name: Graduate Student

☐ Display OPAC Messages for charged Items

☒ Demerits Apply      Max Demerits: 100      Suspension Days: 10

Save      Cancel

---

**Figure D-13. Patron Group Definitions Dialog Box**

**NOTE:**

If the site is not using Demerits, the **Demerits Apply** check box, the **Max Demerits** and **Suspension Days** fields are unavailable.

Result: The specific settings for the demerits threshold and suspension days are applied to the particular patron group selected.

---



---

**Procedure D-3. Setting the Demerit Rate for Patron Group/Item Type Combinations**

---

Use the following to set the Demerit rates for specific Patron Group/Item Type combinations:

1. After logging in to the System Administration module, click the **Policy Definitions** button from the Circulation list bar.

Result: The **Circulation - Policy Definitions** workspace opens.

2. Modify the **Circulation Policy Matrix Record Settings** as follows:
  - a. Select the Circulation Policy Group.
  - b. Select the **Matrix** tab.
  - c. Select the appropriate Patron Group/Item Type combination for which you want to define the demerits parameters.
  - d. Click the **Modify** button.

Result: The **Circulation Policy Matrix Record Settings** dialog box opens with the **Settings** tab available.

3. Set the demerit rates to be used. This is done in the **Demerits**, **Max Demerits**, **Recall Demerits**, and the **Max Recall Demerits** fields on the **Settings** tab. This is also where you set the loan, renewal, and grace periods, as well as the intervals. See *Add - Circulation Policy Matrix Record Settings Dialog Box* in the *Voyager Systems Administration User's Guide* for more information on those settings.
  - a. Enter the number of demerits to be assessed each day an item is overdue in the **Demerits** field.
  - b. Enter the maximum number of demerits a patron can receive for any one overdue situation in the **Max Demerits** field.
  - c. Enter the number of demerits to be assessed each day a recalled item is overdue in the **Recall Demerits** field.
  - d. Enter the maximum number of demerits a patron can receive for any one overdue recall situation in the **Max Recall Demerits** field.

Result: Demerit rates are defined for the selected Patron Group/Item type matrix (see [Figure D-14](#)).

The screenshot shows a dialog box titled "Circulation Policy Matrix Record Settings". At the top, there are two input fields: "Patron Group:" with the value "Courtesy Patron" and "Item Type:" with the value "book". Below these are two tabs: "Settings" and "Intervals", with "Intervals" being the active tab. The "Intervals" tab contains several settings, each with a checkbox and a corresponding input field or dropdown menu. The settings are: "Charge/Renew" (checked), "Recall" (checked), "Hold" (checked), and "Call Slip" (checked). Below these are: "Loan Period:" (21) and "Day" (dropdown), "Renewal Period:" (21) and "Day" (dropdown), "Max # of Sequential Renewals:" (2), "Fine Interval:" (Day) and "Day" (dropdown), "Demerits:" (0.15), "Max Demerits:" (10.00), "Max Recall Demerits:" (10.00), "Min Loan Period for Recalled Items:" (10) and "days", "Recall Fine Interval:" (Day) and "Day" (dropdown), "Recall Demerits:" (0.25), "Grace Period:" (3) and "days", "Recall Return Interval:" (5), and "Recall Grace Period:" (3). At the bottom, there is a "Renew From:" section with two radio buttons: "Original Due Date" (selected) and "Renewal Date". At the very bottom are "OK" and "Cancel" buttons.

---

**Figure D-14. Settings Tab**



**IMPORTANT:**

*The numbers entered include a decimal place consistent with the sites base currency. Therefore, if the base currency is US dollars, then entering 25 will be saved in the database as .25. Likewise, since the Australian dollar has two decimal places, entering 25 will be saved in the database as .25.*

**NOTE:**

Fractional demerit points are valid.

4. Select the **Intervals** tab and enter the appropriate interval information.
-

---

## WebVoyage Settings

---

The WebVoyage `opac.ini` file contains the configuration settings to allow patrons to see their accrued demerits or fines and to see if their patron record has been suspended. There are two new sections in the `[Patron_Info_Page]` Stanza of the `opac.ini` file: the `Demerits` section and the `Personal Information` section.

### NOTE:

There is no additional set up that needs to be done by the user. When there are accrued fines or accrued demerits, no demerits, or suspension information, it will display when patrons access their account information.

## Displaying Demerit Information in WebVoyage

The `Demerits` Section of the `[Patron_Info_Page]` stanza of the `opac.ini` file, found in the `/ml/voyager/xxxdb/etc/webvoyage/local` directory, includes the following lines to enable the display of patron demerits information (see [Figure D-15](#)).

---

```
# Demerits Section
Demerits=Demerit Points
Date=Date
PostingType=Posting Type
Demerits=Demerits
Posting=Posting
Balance=Balance
Total=Total
NoDemerits=You have no demerit points.
DemeritsBorderVal=
DemeritsSectionLabelColor=
DemeritsDatabaseNameColor=
DemeritsHeaderColor=
DemeritsHeaderFontColor=
DemeritsDataColor=
DemeritsDataFontColor=
```

---

**Figure D-15. Demerits Section of the `opac.ini`**

The demerit information displays in the Patron Information area of WebVoyage (see [Figure D-9](#) on [page D-16](#)).

### Displaying Suspension Information in WebVoyage

The Personal Information section of the [Patron\_Info\_Page] stanza of the `opac.ini` file, found in the `/ml/voyager/xxxdb/etc/webvoyage/local` directory, includes the following lines to enable the display of patron suspension information (see [Figure D-16](#)).

---

```
# Personal Information Section now includes a:  
SuspendedUntil=Suspended Until  
notice.
```

---

**Figure D-16. Personal Information Section of the `opac.ini`**

The patron suspension information displays in the Patron Information area of WebVoyage.

**NOTE:**

In these stanzas anything to the right of the equal (=) sign is editable.

### Suspension Exception Dates

---

Suspension exception dates are specific dates to which a suspension will not apply. Circulation batch job 31, Patron Suspension, applies suspensions and uses this file when determining the suspension period. The `exceptdates.cfg` file must be created to run this job. It defines the specific dates that are excepted from suspension and the patron group to which those dates apply.

**NOTE:**

If your site does not have any exception dates, create the file with no data in it.

The file should be created using `vi` or an appropriate UNIX editor. Once created this file should be placed in the `/ml/voyager/xxxdb/ini` directory.

The following format is for the `exceptdates.cfg`:

```
[PATRON GROUP CODE]MMDDYYYY-MMDDYYYY
```

The patron group code is found in **System Administration Circulation - Patron Groups**.

The following lines are examples of entries in an `exceptdates.cfg` file.

`[FAC]12152001-12312001`

`[FAC]01062002-02012002`

`[UGRD]12012001-01152002`

**NOTE:**

Multiple spans of exception dates can be listed.

## **Circulation Batch jobs**

---

There are two circulation batch jobs: Circjob 30, Accrued Fines and Demerits, and Circjob 31, Patron Suspension, that should be run as part of Demerits functionality.

An additional batch job, Circjob 37, Forgive Demerits, may be run if wanted but is not necessary.

Procedures on how to run these jobs can be found in the *Voyager Technical User's Guide*.

### **Circjob 30 Accrued Fines and Demerits**

---

This circulation batch job calculates accrued fines or demerits.

If **Use Demerits** is not Selected in **System Administration> Circulation> Miscellaneous**, this job will calculate accrued fines. This is the fine that would be assessed if an overdue item were discharged at the time the job is run.

If **Use Demerits** is Selected in **System Administration> Circulation> Miscellaneous**, this job will calculate accrued demerits. This is the number of demerits that would be assessed if an overdue item were discharged at the time the job is run.

These calculations take into account the grace period that has been set up in the **System Administration> Circulation> Policy Matrix Definitions** for the specific patron group/item type combination.

This job should be run daily and can be added to any current cron jobs you may have set up.

For each overdue item the following is performed when the job is run:

1. Deletes any previous accrued fine or demerits.
2. Calculates the accrued fine or demerits for the item as if it were discharged immediately, for all patron records where fines/lost item fees apply.
3. Determines and applies the fine/fee type reason, either accrued fine or accrued demerit.
4. Reports any accrued demerits or fines for stub patrons back to their home patron records.

**NOTE:**

There is no mailed notification of accrued fines or demerits.

Patron can check their accrued fines or demerits by asking at a Circulation desk or by accessing their Patron Information in WebVoyage.

### **Circjob 31 Patron Suspension**

---

This circulation batch job applies a suspension or more than one suspension to a patron's record if they have reached or exceeded the threshold number of demerits (**Max demerits**).

The job uses an `exceptdates.cfg` file when determining the suspension period. This file defines the specific dates that are excepted from suspension and the patron group to which those dates apply. The `exceptdates.cfg` file must be created to run this job.

**NOTE:**

If your site does not have any exception dates, create the file with no data in it.

This job should be run daily and can be added to any current cron jobs you may have set up.

Suspensions cannot be applied to patrons with accrued demerits. A patron must return all overdue items before they can be suspended. In this case, however, the patron will be blocked from circulation activity. They are blocked because the sum of their accrued and real demerits meets or exceeds the max demerits, resulting in a circulation block.

It is not until the patron has returned an item that accrued demerits change into real demerits and the suspension is applied.



In addition to applying the suspension, this job subtracts the number of demerits equal to the max demerits threshold from the patron record. For example, if a person accumulates 53 demerits and the max threshold is 25, 50 demerits will be subtracted from the total.

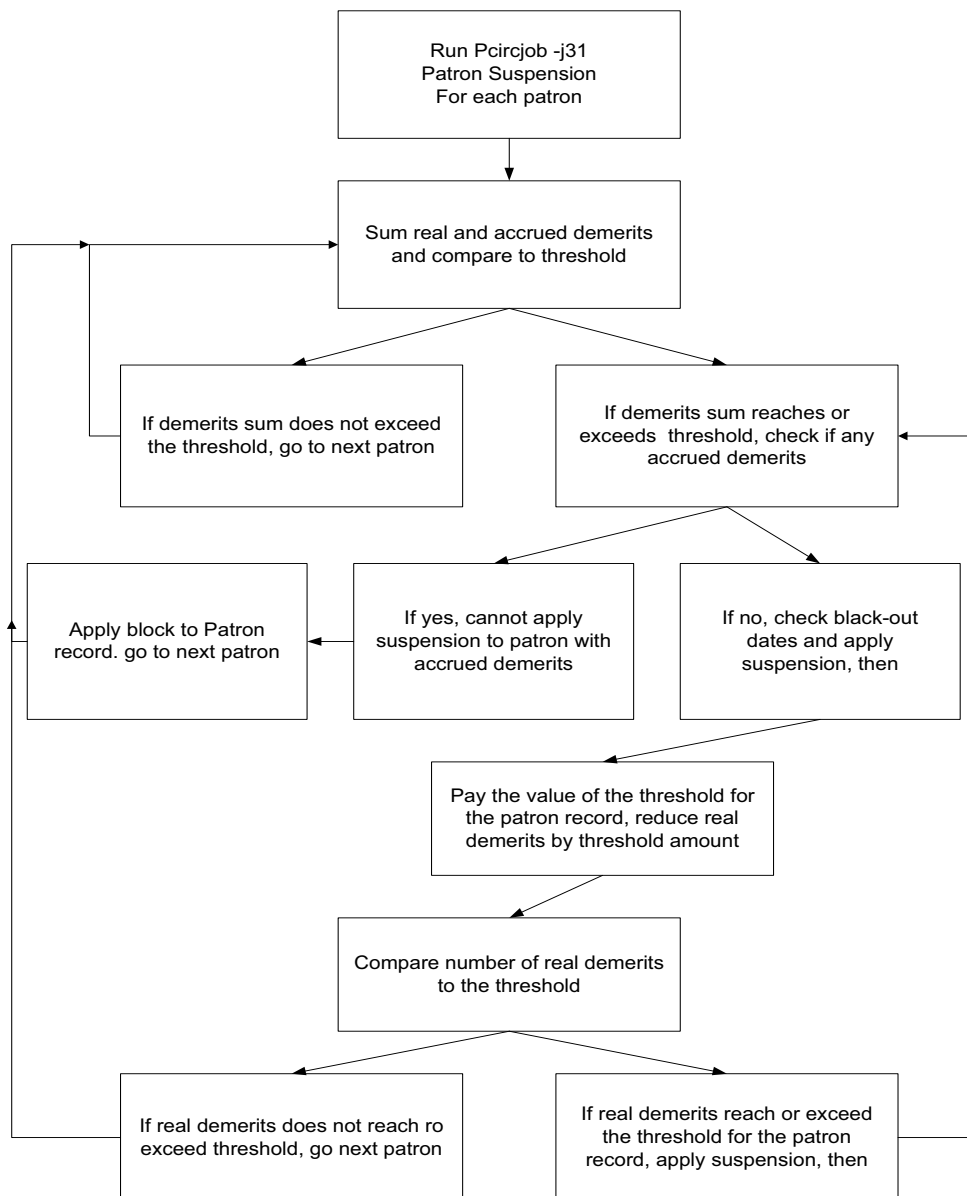
When the job runs, the following is performed for each patron:

1. Sums the demerits and compares that sum to the threshold number (if the patron belongs to more than one patron group it will use the lowest threshold amount). If the threshold limit is reached or exceeded then.
2. Applies the suspension, taking into account any exception dates.
3. Subtracts the value of the max demerits for the patron record.
4. Checks for additional real demerits that reach or exceed the threshold amount. If so, another suspension will be applied with the begin date of that suspension following the end date of the prior suspension. This occurs until there are no longer enough real demerits to invoke a suspension.
5. Subtracts the value of max demerits on the home patron record if a stub patron is suspended.

**NOTE:**

Suspension dates should be calculated from the system date (current date) or the patron suspension end date, whichever value is greater.

See the flowchart of how Circjob 31 works, [Figure D-17](#).



---

**Figure D-17. Flowchart of How Circjob 31, Patron Suspension Works**

### **Example of Circjobs 30 and 31**

---

Assume the following scenario with these Demerits parameters:

- An undergraduate student's book is due 2/4.
- Max Demerits: 25
- Suspension period: 5 days
- Demerit rate for Undergraduate/book: 5 demerits/day
- Grace period: 0 days
- Circjob 30 and Circjob 31 are run each night with cron jobs
- Exception date(s): 2/14

On the first day (2/5) that the item is overdue and the accrued demerits equal five.

On the fifth day (2/9) patron is blocked from circulation activity since accrued demerits are 25.

On the seventh day (2/11) the item is returned and discharged and the accrued demerits of 35 are change into 35 real demerits. Patron remains blocked from circulation activity.

Overnight circjob 31 is run as follows:

Thirty-five real demerits exceeds the threshold of 25 and the suspension is applied.

The exception date of 2/14 is taken into account when creating the suspension period of five days: 2/12, 2/13, 2/15, 2/16, and 2/17.

The threshold amount of 25 demerits is subtracted from the demerits amount of 35 leaving a new demerits amount of 10.

The suspension period begins as soon as the suspension is applied, that is when the job is run. On 2/18 the patron will be able to take advantage of the circulation privileges once again.

### **Circjob 37 Forgive Demerits**

---

This batch job forgives an eligible patron's actual demerits. It is run on an entire database; therefore, it includes all the Circulation Clusters within that database. Administrators provide the number of demerits, which may be a fraction, they want to forgive for each eligible patron. Typically, this job will be run at the end of semesters and over holidays.



**IMPORTANT:**

*This batch job does not forgive fines or fees.*

Patrons are eligible to have their demerits forgiven if they meet the following criteria:

- The patron has actual demerits.
- The patron's number of total demerits, actual and accrued, does not exceed that patron group demerit threshold, that is the patron is not blocked. When multiple patron groups exist use the patron group with the lowest threshold.
- The patron is not suspended.
- The patron has no outstanding fines or fees.

**NOTE:**

There is no record of these demerits and changes made by this batch job are permanent.

This job should be run after Circjob 30, Accrued Demerits, since it establishes eligibility to have demerits forgiven.

For sites participating in Universal Borrowing, this job may be run against databases in which demerit usage is not enabled. Also, reliable network connection must exist among Voyager databases so the home patron record may be updated. If there is a network interruption, the software will rollback changes in the local cluster for the patron currently being processed.

The -q parameter is used to define the number of demerits to be forgiven.

When the job runs, the following is performed:

- Connects to the remote databases.
- Finds all eligible patrons.
- Forgives the number of demerits provided.
- Updates the patron record.
- Creates circjob log file.

The `circjob.log` file includes the session beginning and end times, lists any stub patrons whose demerits were not forgiven due to an inability to connect to their home database, and lists the total number of patron who had demerits forgiven.

To instruct the system to forgive 25 demerits, enter the following batch job at the `sbin>` prompt:

```
Pcircjob -j37 -q25
```

**NOTE:**

This job can be run using WebAdmin.

## **Circulation Module Activity**

---

The functionality of the circulation module incorporates checking suspensions and demerits, applying demerits, and displaying new patron record information. Additionally some users with proper security, those who are able to override patron blocks, will have the ability to manually suspend a patron, or alter the end date of a suspension.

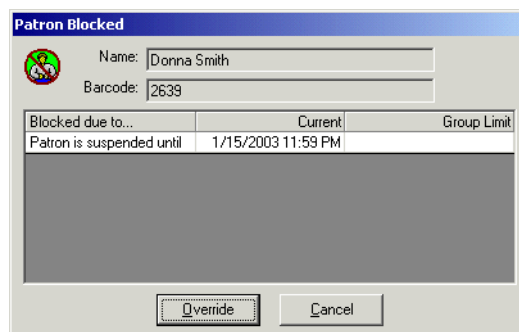
Circulation module includes the following functionality:

- Checking for a suspension and summing demerits, when charging or requesting.
- Applying real demerits at discharge.
- Posting against demerits.
- Adding demerits manually.
- Manually applying patron suspensions.
- Editing patron suspension end dates.

### **Checking for Suspensions and Summing Demerits**

---

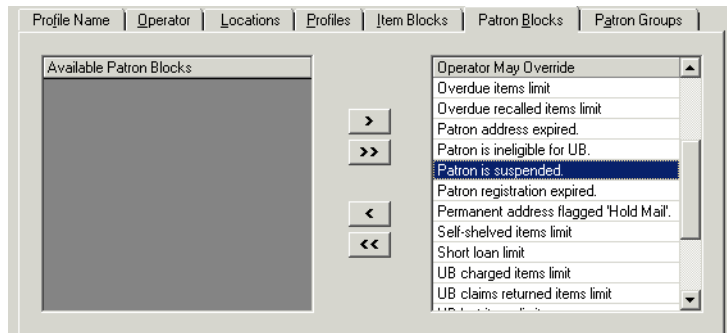
When a patron attempts to charge or request an item at a circulation desk, Voyager will check the patron record for a suspension. If there is a suspension of the patron's record, the **Patron Blocked** dialog box displays (see [Figure D-18](#)).



**Figure D-18. Patron Blocked Due to Suspension Message**

**NOTE:**

A user with proper security can override the block. They must have the **Patron is suspended** block in the Operator may Override list in their Circulation Security profile (see [Figure D-19](#)). See *Patron Blocks Tab* in the *Voyager System Administration User's Guide* for more information.



**Figure D-19. Patron is Suspended Block Override Capability**

If there is no suspension, Voyager then will add the number of accrued and real demerits. If the total demerits reach or exceed the max demerits threshold, the patron receives a block due to maximum demerits limit (see [Figure D-20](#)).

**Patron Blocked**

Name: Jane Doe  
Barcode: 123321

Blocked due to...	Current	Group Limit
Maximum demerits limit	25.00	25.00

Override Cancel

**Figure D-20. Patron Blocked Due to Maximum Demerits Limit Reached**

**NOTE:**

A user with proper security can override the block. They must have the **Maximum Demerits limit** block in the Operator may Override list in their Circulation Security profile (see [Figure D-21](#)). See *Patron Blocks Tab* in the *Voyager System Administration User's Guide* for more information.

Profile Name | Operator | Locations | Profiles | Item Blocks | Patron Blocks | Patron Groups

Available Patron Blocks

Operator May Override

- Call slip limit
- Charged items limit
- Claims returned items limit
- Lost items limit
- Maximum demerits limit**
- Maximum fines limit
- Outstanding recalls limit
- Overdue items limit
- Overdue recalled items limit
- Patron address expired
- Patron is ineligible for UB

**Figure D-21. Maximum Demerits Limit Override Capability**

See [Patron and Item Blocks](#) on [page 9-1](#) for more information about blocks and overriding blocks.

## Applying Real Demerits

---

When an overdue item is discharged, Voyager checks to see if it is within the grace period interval. If the grace period has elapsed and the library uses demerits, the appropriate number of demerits based on the criteria set up in the Circulation Matrix definitions in the System Administration module are assessed.

If the library does not use demerits, a monetary fine would be assessed.

## Posting Against Demerits

---

Demerits are paid down by the threshold amount automatically when a suspension is applied. However, an authorized user may pay (post against) real demerits, but cannot post against accrued demerits.

The **Post Against Fine/Fee** dialog box allows you to post payment of demerits to one or more demerit penalties.



### Procedure D-4. Posting Against Demerits Manually

---

Use the following to post against real demerits:

1. After logging in to the Circulation module, search for and display the patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
2. Click the **Fines/Fees** icon or select **Fine/Fee Info** from the **Patron** menu.

Result: The **Patron Fines/Fees** dialog box opens.

3. Click the **Outstanding Demerits** tab and then the **Post** button.

Result: The **Post Against Demerits** dialog box opens (see [Figure D-22](#)).



**Figure D-22. Post Against Demerits Dialog Box**

**NOTE:**

If you want to post against a specific demerit penalty, you can do so by selecting the specific penalty in the **Fines/Fees** dialog box. If not the posting will be applied to the total.

Also, you can select multiple demerit penalties for payment in a single transaction by holding down the Ctrl key when selecting the penalties.

4. Enter the post against demerits information:
  - a. Click the **Selected** radio button to post against an individual penalties already selected or **Patron total** to post against the total.
  - b. Select the posting type from the **Posting Type** drop-down list that includes both system-defined and user-defined options.



**IMPORTANT:**

*Your security profile determines what Posting Type options are available for you select. See the Voyager System Administration User's Guide.*

- c. **Enter** the number of demerits to pay in the **Amount** field.
- d. Place the cursor in the **Description** box to add a description of this post if wanted.
- e. Click **OK**, or **Cancel** to not post any demerits.

Result: The demerits are paid. The **Post Against Demerits** dialog box closes and an entry on the **Outstanding Demerits** tab opens the post information.

**NOTE:**

If the user tries to post against accrued demerits the warning message *You cannot post against accrued balances* displays (see [Figure D-23](#)).



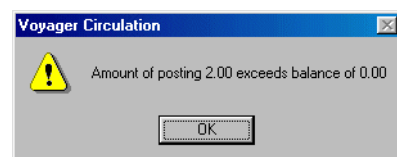
---

**Figure D-23. Message Displayed When Attempting to post Against Accrued Demerits**

**NOTE:**

If the user tries to post against one or more accrued demerits and one or more real demerits, and the amount posted is less than or equal to the sum of the real demerits, the posting is allowed and the real demerit total adjusted accordingly. The accrued demerits total remains untouched.

However, if the amount posted is more than the sum of the real demerits, the error message, *Amount of posting exceeds balance due*, displays (see [Figure D-24](#)).



---

**Figure D-24. Message Displayed When Posting Exceeds Balance**

---

## Adding Demerits/Fines Manually

Users may manually add demerits or fines to the patron record if they have the proper security. See [Adding Fines/Fees](#) on [page 4-92](#).



### Procedure D-5. Adding Demerits Manually

Use the following to add demerits manually.

1. After logging in to the Circulation module, search for and display the patron record. See [Searching for a Patron Record](#) on [page 3-2](#).

2. Click the **Fines/Fees** icon, or select **Fine/Fee Info** from the **Patron** menu.

Result: The **Fines/Fees** dialog box opens.

3. Click the **Outstanding Demerits** tab or the **Demerits History** tab, then the **Add** button.

Result: The **Add Demerits** dialog box opens (see [Figure D-25](#)).

**Figure D-25. Add Demerits Dialog Box**

4. Enter the add demerits information:
  - a. The **Fee Type** is by default Demerit and cannot be edited.

**NOTE:**

Accrued demerits or fines may not be manually added.

- b. **Enter** the number of demerits to add in the **Amount** field.
- c. **Enter** the item barcode in the **Item Barcode** field, or click the ellipses and search for an item. This is not a required field.
- d. Place the cursor in the **Description** box to describe this addition if desired. This displays in the **Description** box on the tab.
- e. Click **OK** to add the demerits, or **Cancel** to cancel.

Result: If clicked **OK**, then demerits are added to the Patron record. The **Add Demerits** dialog box closes and an entry on **Outstanding Demerits** tab opens the added demerits information.

---

## Manually Suspending a Patron Record

---

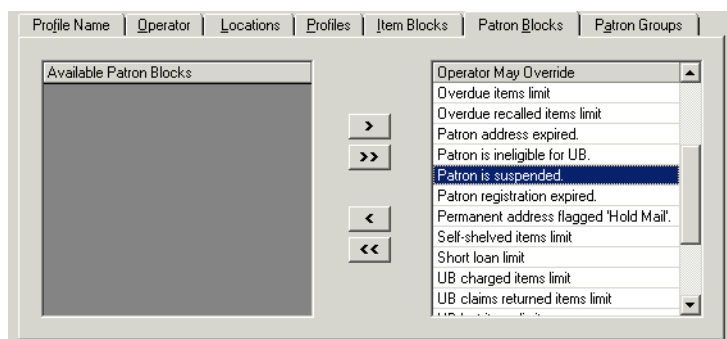
Operators have the ability to suspend a Patron's circulation privileges regardless of whether the library uses demerits or fines for overdue penalties and if they are able to override the **Patron is suspended** block. See *Patron Blocks Tab* in the *Voyager System Administration User's Guide* for more information.

### NOTE:

Expired patrons and patrons without active patron groups cannot be suspended.

They have access to the **Suspend Patron** dialog box (see [Figure D-26](#)).

---



---

**Figure D-26. Patron is Suspended Block Override Capability**



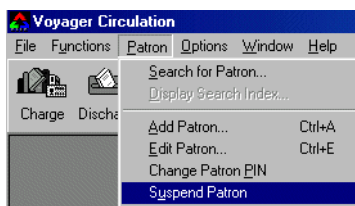
## Procedure D-6. Suspending a Patron Record Manually

---

Use the following to manually suspend a patron's circulation privileges.

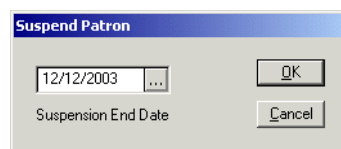
1. After logging in to the Circulation module, search for and display the patron record. See [Searching for a Patron Record](#) on [page 3-2](#).

- Click the **Patron** menu in the top tool bar, click **Suspend Patron** (see [Figure D-27](#)) or right-click while in the Patron record, from the menu that displays select **Suspend Patron**.



**Figure D-27. Suspend Patron Option in the Patron Menu**

Result: The **Suspend Patron** dialog box opens (see [Figure D-28](#)).



**Figure D-28. Suspend Patron Dialog Box**

- Click the ellipses to bring up the calendar, or **Enter** the suspension end date in the **Suspension End Date** field, then click **OK** to save the suspension, or **Cancel** to cancel the suspension.

Result: The **Patron Suspension** dialog box opens with the Patron is suspended until message (see [Figure D-28](#)).



**Figure D-29. Patron Suspension Message**

4. Click **OK**.

Result: The patron is immediately suspended until the date entered.

---

### **Editing Patron Suspension End Dates**

---

Operators with the ability to override patron blocks can also edit the suspension end date.



#### **Procedure D-7. Editing Patron Suspension End Dates**

---

Use the following to edit a patron's suspension end date.

1. After logging in to the Circulation module, search for and display the patron record. See [Searching for a Patron Record](#) on [page 3-2](#).
2. Click the **Patron** menu in the top tool bar, click **Suspend Patron** (see [Figure D-28](#)) or right-click while in the Patron record, from the menu that displays select **Suspend Patron**.

Result: The **Suspend Patron** dialog box opens with the Suspension End Date listed.

3. To edit the **Suspension End Date** click the ellipses to bring up the calendar, or **Enter** the new suspension end date in the **Suspension End Date** field, then click **OK** to save the new end date or **Cancel** to cancel the new end date.

**NOTE:**

You can also select the date and press the delete key on your keyboard to delete the suspension altogether.

Result: The **Patron Suspension** dialog box opens with the new end date.

4. Click **OK**.

Result: The patron is immediately suspended until the date shown. Or, if the date was deleted, the patron is not suspended any longer.

---

Demerits functionality allows libraries to assess a non-monetary penalty when a patron has overdue items. It also allows for the automatic suspension of library privileges based on reaching the penalty threshold. As we have seen implementing Demerits occurs at the patron group level providing for much flexibility.

Libraries not implementing Demerits will still be able to use the features of manually suspending a patron record and determining accrued fine values for patrons with overdue items.

After a site decides to use Demerits functionality, they need to determine how it will be used. They must determine to which patron groups they want demerits to apply, the threshold amount, suspension period, and other parameters.

Once these parameters have been decided, enabling Demerits is a simple process. Basically it involves System Administration module settings and running the circulation batch jobs.

In the System Administration module, a check box to use demerits needs to be Selected and the parameters that governs how demerits will work need to be set for each patron group.

Then the circulation batch jobs that calculate accrued fines/demerits and patron suspension need to be added to a daily cron job (or run manually each day).





## Index

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### Symbols

! (exclamation point), [3-18](#)  
? (question mark), [3-18](#)  
\* (asterisk), [3-18](#)  
% (percent sign), [3-18](#)  
+ (plus sign), [3-18](#)

---

### Numerics

007 control field  
    position 01, [3-64](#)  
008 control field  
    position 06, [3-67](#)  
    position 07-10, [3-63](#)  
    position 15-17, [3-66](#)  
    position 35-37, [3-62](#)

---

### A

about this document, [xix](#)  
accelerator key, [4-54](#), [5-29](#), [6-20](#), [7-19](#)  
Accept Payments check box, [4-99](#), [7-10](#)  
accessing  
    Call Slips tab, [4-118](#)  
    Charged Items Index dialog box, [4-76](#)  
    charged to information, [5-12](#)  
    Hold Recalls tab, [4-110](#)  
    item statistical categories dialog box, [5-16](#)  
    item status dialog box, [5-22](#)  
    Notes dialog box, [4-129](#)  
    Patron Fines/Fees dialog box, [4-91](#)  
    Short Loans tab, [4-124](#)  
accessing search history, [3-54](#)  
accrued demerits, [D-2](#)  
accrued fines, [D-2](#)  
action codes, [B-5](#), [B-6](#)  
    initiating and ending, [B-6](#)

Active Barcode field, [11-4](#)  
Active check box, [11-13](#), [11-17](#), [11-24](#)  
Active? field, [11-3](#)  
Add Bib/Item dialog box, [5-37](#), [5-38](#), [6-23](#), [8-31](#)  
    Bib tab, [5-47](#)  
    Holdings tab, [5-50](#)  
    Item tab, [5-51](#)  
Add button, [4-89](#)  
Add Demerits dialog box, [D-37](#)  
Add E-Item and Holding To Existing Bib Record dialog box, [8-45](#)  
Add E-Item To Existing Bib/Holding Record dialog box, [8-46](#)  
Add E-Item to Reserve List dialog box, [8-48](#)  
Add Fine/Fee dialog box, [4-92](#), [4-94](#), [4-98](#)  
Add Item dialog box, [5-56](#), [5-62](#)  
Add New Item Barcode dialog box, [5-27](#)  
Add New Patron dialog box, [4-19](#), [6-22](#)  
Add New Patron Record dialog box, [4-19](#), [4-24](#), [4-27](#)  
Add/Update Item Records check box, [5-55](#), [7-13](#), [7-15](#)  
Add/Update Proxy Patron check box, [4-146](#)  
Add/Update Recall/Hold Requests check box, [5-79](#), [6-3](#)  
adding  
    additional copies of items on a reserve list, [8-30](#)  
    bib/items, [8-30](#)  
    bibliography information to item, [6-23](#)  
    course information, [8-60](#)  
    demerits manually, [D-36](#)  
    e-items to a reserve list, [8-39](#)  
    existing e-items to a reserve list, [8-48](#)  
    fine/fee, [4-89](#), [4-94](#)  
    fine/fee from Charge/Renew window, [4-96](#)  
    fines/fees, [4-92](#)  
    item record, [5-55](#)  
    items to reserve list, [8-21](#)  
    items to reserve list by barcode, [8-23](#)  
    multiple addresses to patron record, [4-54](#)  
    multiple barcodes to patron record, [4-54](#)  
    multiple phone numbers to patron record, [4-54](#)  
    new e-item to bib/holding record, [8-46](#)  
    new e-item/holding to bib record, [8-44](#)  
    new patron record, [4-29](#)  
    new template stanza, [5-45](#)  
    patron note, [4-130](#)  
    patron record, [6-22](#)  
    physical item by Headings/Keyword searching, [8-27](#)  
    proxy patron, [4-148](#)  
records

---

- bibliographic, [5-37](#)
  - holdings, [5-37](#)
  - item, [5-37](#)
  - records on-the-fly, [5-37](#)
  - self check location to circ policy definition, [C-4](#)
- Address display field, [4-14](#)
- Address field, [5-12](#)
- address note, [4-127](#), [4-128](#)
- Address tab
  - Edit Patron Record dialog box, [4-48](#)
- address type
  - E-mail, [4-14](#), [4-55](#)
  - permanent, [4-14](#), [4-26](#), [4-55](#)
  - rules, [4-55](#)
  - temporary, [4-14](#), [4-55](#)
- Address Type field, [4-14](#)
- Address/Phone tab, [4-4](#), [4-14](#)
- alert
  - patron comment, [9-18](#)
- All Received? check box, [11-22](#)
- Amount field, [4-93](#), [5-35](#)
  - Posting Against Fine/Fee dialog box, [4-101](#), [7-12](#)
- applying
  - item statistical category, [5-16](#)
  - item status to the item record, [5-23](#)
  - patron statistical category, [4-142](#)
  - real demerits, [D-34](#)
- archive short loans, [10-8](#)
- assigning
  - new barcode to existing item record, [5-26](#)
- asterisk
  - display when operator unable to view identifying information, [5-32](#)
- asterisk (\*), [3-18](#)
- At bindery item status, [5-20](#)
- Attach Holdings to Any Bibliographic Record check box, [5-37](#)
- audience
  - of this document, [xix](#)
- Auth/Ref additional references, [3-40](#)
- Author field, [5-6](#), [5-49](#), [8-6](#)
- Authority button, [3-42](#)
- Authority records
  - Select one or more authority records dialog box, [3-46](#)
- Authorized additional references, [3-40](#), [3-42](#)
- Auto Reorder check box, [11-14](#), [11-17](#), [11-24](#)

---

## B

- Backdate button, [7-3](#), [7-7](#)
- Backdate Discharge Time To dialog box, [7-8](#)
- Backdate Due Date/Time at Discharge check box, [7-7](#)
- backdating
  - due dates, [7-6](#)
  - many items to same date, [7-7](#)
- Balance field, [4-88](#), [D-13](#)
- barcode
  - copying, [4-54](#), [5-29](#)
  - deleting inactive barcode, [5-28](#)
  - pasting, [6-20](#), [7-19](#)
  - searching by, [3-6](#)
- barcode 3 of 9 font, [B-7](#)
- Barcode field, [3-4](#), [3-76](#), [4-47](#), [4-88](#), [4-109](#), [4-116](#), [4-122](#), [4-123](#), [5-3](#), [5-13](#), [5-35](#), [5-60](#), [5-68](#), [5-81](#), [5-88](#), [6-5](#), [6-6](#), [8-6](#), [10-17](#), [D-13](#)
  - Patron Id tab, [4-12](#)
  - Proxy Patron Maintenance dialog box, [4-150](#)
- barcode note, [4-127](#), [4-128](#)
- barcode status error message, [4-47](#)
- Barcode tab, [4-24](#), [4-25](#)
  - Edit Patron Record dialog box, [4-45](#)
- batch job
  - circulation
    - accrued fines and demerits, [D-3](#), [D-25](#)
    - forgive demerits, [D-3](#)
    - patron suspension, [D-3](#), [D-26](#)
    - retain patron ID, [11-29](#)
- beep on charge, [6-21](#)
- Begins field, [8-56](#)
- Bib Brief tab, [5-4](#), [5-5](#)
- Bib tab, [5-39](#)
  - Add Bib/Item dialog box, [5-47](#)
  - customizing fields, [5-39](#)
  - default variables, [5-44](#)
  - field variables, [5-45](#)
- bibliographic field code, [B-9](#)
- bibliographic record
  - adding, [5-37](#)
  - viewing, [5-71](#)
- bibliographic record search
  - builder search, [3-52](#)
- Bibs column
  - Headings List, [3-42](#)
- Birth Date field, [4-14](#), [4-24](#), [4-45](#)
- block

- item, 9-1
- patron, 9-1
- blocked requests, 5-83
- [Book] stanza, 5-41, 5-47
- Boolean button, 3-29
- Boolean keyword search, 3-74
- Boolean operators, 3-27
- Boolean radio button, 3-17
- Browse Headings List dialog box, 3-26
- Browse radio button, 3-22
- browse search, 3-25, 3-50
- builder search
  - deleting search terms, 3-29
  - editing search terms, 3-29
- builder searching, 3-27, 3-52
  - Circulation, 3-84
- Builder tab, 3-27, 3-52
- bursar transfer system, 4-105
  - refund, 4-106
- button
  - Add, 4-89
  - Authority, 3-42
  - Backdate, 7-3, 7-7
  - Boolean, 3-29
  - Callslips, 6-6
  - Cancel H/R, 5-89
  - Charge, 3-8, 10-24
  - Charged Items, 4-3, 4-5, 4-77, 6-5
  - Charged to, 5-3
  - Clear, 11-3
  - Close, 11-4
  - Counters, 4-3, 4-10, 4-138
  - Default Source, 11-24
  - Default Tab, 3-19, 3-23, 3-29
  - Delete, 11-4
  - Discharge, 4-76
  - Distribute, 11-4
  - Distribution, 11-4, 11-7, 11-15
  - Edit, 8-53
  - E-mail control, 1-9, 4-3, 4-4, 6-5
  - Fines/Fees, 4-3, 4-6, 6-6
  - Inventory, 11-4, 11-16
  - Item, 3-12
  - Item Info..., 4-76, 4-89, D-14
  - Limit, 3-19, 3-24, 3-30, 3-67
  - Link, 8-53
  - Minus, 8-53
  - New Operator, C-2
  - Notes, 4-3, 4-8, 5-3, 5-14, 6-6
  - Order, 11-15, 11-19
  - Patron Fines, 5-35

- patron maintenance, 3-5
- Patron Request Information, 4-7
- Place Request, 5-3, 5-79, 5-84
- Plus, 8-53
- Post Against option, 7-12
- Post..., 4-91
- Print, 11-4
- Proxy Patron, 6-5, 6-15
- Receipt, 6-6
- Receive, 11-15
- Refresh, 10-21
- Renew, 4-76, 6-14
- Request Information, 4-3, 6-6
- Request Maintenance, 5-3, 5-86, 5-90, 5-93, 5-97
- Reserve, 8-14
- Save Settings, 3-30
- Send Record To, 5-74, 5-75
- Short Loan, 10-22
- Short Loan Request information, 6-6
- Source, 11-19
- Statistics, 4-4, 4-11, 4-140, 5-4
- Status, 5-4
- Stop, 3-32, 3-38, 3-41
- Supervisor, 9-16, 9-21

---

## C

- Call No. field, 5-8
- Call No. Type field, 5-8, 5-51, 5-57, 5-68
- Call Number field, 4-75, 5-7, 5-51, 5-57, 5-68, 8-6, 10-21, 11-4
- call number searching, 3-26
- Call Number Type field, 5-7
- call slip
  - canceling, 4-119
  - charging, 4-120
  - printing, 4-120
- call slip request, 4-106, 4-115
  - description, 5-78
  - message, 5-99
  - placing, 5-83
- Call Slip Request item status, 5-21
- Call Slips Placed (historical) counter, 4-138
- Call Slips tab
  - accessing, 4-118
- Callslips button, 6-6
- Cancel H/R button, 5-89

---

Cancel Request button field, 10-21  
Cancel S/L button field, 10-18  
canceling  
    call slip, 4-119  
    hold request, 4-111  
    recall request, 4-111  
    requests, 5-86  
    short loan, 4-124, 10-18  
    short loan request, 10-23  
Caption field, 5-8, 5-51, 5-58  
Catalog Review item status, 5-21  
Cataloging Review check box, 5-53, 5-60  
Change Due Date check box, 4-82, 6-18  
Change Item Types dialog box, 8-35  
Change Locations dialog box, 8-35  
change password, 14-4  
Change Patron PIN dialog box, 4-71  
charging  
    physical item types and locations for reserve list items, 8-34  
    PINs in Circulation module, 4-70  
    printer settings, B-17  
charge  
    time-out, 6-18  
Charge <Offline Mode> workspace, 6-29  
Charge button, 3-8, 10-24  
Charge Date field, 5-12  
charge time-out, 6-8, 6-10  
charge timeout  
    configuring, 1-6  
    editing timeout value, 1-8  
    timer, 1-7  
Charge work space, 1-6, 3-8, 4-77, 4-96, 4-157, 6-1, 6-4, 6-9  
    e-mailing patrons, 4-157  
    searching for a patron record, 3-8  
Charge workspace  
    pasting barcodes, 6-20  
charge/renew menu, 14-8  
Charged, 5-31  
Charged field, 5-31  
Charged item status, 5-20  
Charged Items button, 4-3, 4-5, 4-77, 6-5  
Charged Items Index dialog box, 4-5, 4-74, 4-77, 4-78, 4-79, 4-80, 4-83, 4-85, 6-11, 6-13, 6-21  
    accessing, 4-76  
    discharging items, 4-80  
    displaying item information, 4-77  
    printing charged items, 4-79  
    renewing items, 4-85, 6-12  
Charged to button, 5-3  
Charged To dialog box, 4-159, 5-12  
    e-mailing patrons, 4-159  
ChargeTimeout key, 1-7  
charging  
    call slip, 4-120  
    hold request, 4-112  
    item with self check, C-21  
    items, 6-8  
    items in offline charge, 6-28  
    proxy patron, 6-14  
    recall request, 4-112  
    short loan, 4-126, 10-24  
check box  
    Accept Payments, 4-99, 7-10  
    Active, 11-13, 11-17, 11-24  
    Add/Update Item Records, 5-55, 7-13, 7-15  
    Add/Update Proxy Patron, 4-146  
    Add/Update Recall/Hold Requests, 5-79, 6-3  
    All Received?, 11-22  
    Attach Holdings to Any Bibliographic Record, 5-37  
    Auto Reorder, 11-14, 11-17, 11-24  
    Backdate Due Date/Time at Discharge, 7-7  
    Cataloging Review, 5-53, 5-60  
    Change Due Date, 4-82, 6-18  
    Circulation Review, 5-53, 5-60  
    Delete Item Records, 5-55  
    Delete Patron Records, 4-63  
    Demerits Apply, D-5, D-6, D-19  
    Discharge, 7-2  
    Display Demerits, D-5  
    Hold Mail, 4-50, 4-55, 4-154  
    Process Course Reserve, 8-2  
    Protect, 4-50  
    Resequence Recall/Hold Request Queues, 5-86  
    Reset Patron Counters, 4-134  
    Retain Patron Id for Circ History, 5-30  
    Retain search Limits between searches, 3-69  
    Set/Change Item Status, 7-13, 7-15  
    Short Loan, 10-2  
    Update PINs, 4-71  
    Use Demerits, D-5  
choosing  
    patron address for circulation notice, 4-55  
Chron field, 8-6  
Chronology field, 4-117, 5-3, 5-8, 5-13, 5-51, 5-58, 5-68  
circ.ini file, A-3  
Circbib.cfg file  
    This file configures the fields available of the Bib tab when creating a bibliographic record in Cir-

- cualtion., 5-37
- circbib.cfg file, 5-37, 5-39, 5-45
- circjob 28, 11-25
- circjob 30, D-3, D-25
- circjob 31, D-3, D-26
- circjob 37, D-3
- circjob 38, 11-29
- circjob 39, 4-18
- CircSC.ini file, C-1, C-6
- Circulation
  - builder searching, 3-84
  - keyword searching, 3-74
  - non-keyword searching, 3-80
  - searching examples, 3-74
- circulation
  - batch job
    - accrued fines and demerits, D-3, D-25
    - distribution item order report, 11-25
    - forgive demerits, D-3
    - patron suspension, D-3, D-26
    - Place Items on Active Course Reserve Lists, 8-70
    - Place Recalls and Holds for Items on Active Course Reserve Lists, 8-70
    - retain patron ID, 11-29
    - Take Items on Inactive Course Reserve lists Off Reserve, 8-70
  - charge/renew menu, 14-8
  - discharge menu, 14-10
  - editing functions, 14-3
  - e-mailing patrons, 4-154
  - exiting, 1-6
  - file menu, 14-4
  - functions, 2-1
  - functions menu, 14-4
  - help menu, 14-7
  - item menu, 14-17
  - listbar, 2-5
  - offline charge, 6-25
  - options menu, 14-6
  - overview, 2-1
  - patron menu, 14-15
  - requests, 5-77
  - reserve menu, 14-12
  - terms used, 2-4
- circulation batch job
  - course reserve, 8-70
- circulation cluster, 2-2
  - definition, 2-5
- circulation history
  - viewing items, 5-33
- [Circulation History] stanza, A-34
- Circulation Login dialog box, 1-2
- circulation main menu, 14-3
- circulation policy group
  - definition, 2-4
- circulation policy matrix
  - definition, 2-4
- Circulation Review check box, 5-53, 5-60
- Circulation Review item status, 5-21
- [Circulation] stanza, 1-7
- circulation window functions, 14-2
- Circulation work space, 2-5
- City field, 4-27, 4-50
- Claims Returned counter, 4-16, 4-136
- Claims returned item status, 5-21
- Clear button, 11-3
- clear display, 6-21
- clearing display
  - Reserve work space, 8-70
- clearing patron display, 4-154
- Close button, 11-4
- closing
  - circulation function, 1-6
- command line search, 3-19
- command searching, 3-19
- comments
  - about this document, xxiii
- Condition field, 11-3
- configuration file
  - circbib.cfg, 5-37, 5-39, 5-45
  - exceptdates.cfg, D-24, D-26
  - spinelabel.cfg, B-1
- configuring
  - charge timeout, 1-6
  - short loan, 10-1
- configuring demerits, D-18
- Confirm PIN field, 4-72
- conventions used
  - in this document, xxi
- Copy field, 5-3, 5-13, 5-53, 5-60, 5-68, 5-87, 10-17
- copying physical items from another list, 8-32
- counter
  - Call Slips Placed (historical), 4-138
  - Claims Returned, 4-16, 4-136
  - Current Call Slips, 4-16
  - Current Short Loans, 4-16
  - Historical Call Slips, 4-16
  - Historical Charges, 4-16
  - Historical Distributions, 4-16
  - Historical Short Loans, 4-16
  - Holds Placed, 4-16

---

- Item Distributions (historical), [4-138](#)
- Items Borrowed (historical), [4-136](#)
- Items Recalled, [4-16](#)
- Lost Items, [4-16](#), [4-137](#)
- Recalls Placed, [4-16](#)
- Self-Shelved Items, [4-16](#)
- Self-Shelves, [4-137](#)
- Short Loans Placed (historical), [4-138](#)
- Unclaimed Short Loans, [4-16](#)
- counters
  - resetting, [4-138](#)
  - setting, [4-134](#), [4-138](#)
- Counters button, [4-3](#), [4-10](#), [4-138](#)
- Counters tab, [4-4](#), [4-15](#)
- Country field, [4-27](#), [4-51](#)
- Course field, [8-7](#)
- Course Name field, [8-56](#)
- Course Name radio button, [8-13](#)
- Course No. field, [8-56](#)
- Course Number radio button, [8-13](#)
- course reserve
  - adding
    - additional copies of items, [8-30](#)
    - bib/items, [8-30](#)
    - course information, [8-60](#)
    - e-items to a reserve list, [8-39](#)
    - existing e-items to a reserve list, [8-48](#)
    - new e-item/holding to bib record, [8-44](#)
    - physical item by Headings/Keyword searching, [8-27](#)
    - physical items to reserve list, [8-21](#)
    - physical items to reserve list by barcode, [8-23](#)
  - batch job, [8-70](#)
  - changing physical item types and locations, [8-34](#)
  - clearing the display of the Reserve work space, [8-70](#)
  - copying physical items from another list, [8-32](#)
  - creating bib/items, [8-30](#)
  - creating new reserve list, [8-7](#)
  - deleting
    - a reserve list, [8-67](#)
    - course information, [8-64](#)
    - e-items, [8-51](#)
  - editing
    - course information, [8-63](#)
    - e-items, [8-49](#)
    - list header, [8-11](#)
  - linking reserve lists to course information, [8-52](#), [8-57](#)
  - new e-item to bib/holding record, [8-46](#)
  - placing items Off Reserve, [8-38](#)
  - placing items On Reserve, [8-36](#)
  - printing a reserve pick list, [8-69](#)
  - removing
    - e-items from reserve list, [8-51](#)
    - physical items from reserve list, [8-33](#)
  - search result options, [8-15](#)
  - searching
    - for a list, [8-12](#), [8-20](#)
    - for a list by
      - course name, [8-12](#), [8-20](#)
      - course number, [8-12](#), [8-20](#)
      - department code, [8-12](#), [8-20](#)
      - department name, [8-12](#), [8-20](#)
      - instructor, [8-12](#), [8-20](#)
      - list dates, [8-12](#), [8-20](#)
      - list name, [8-12](#), [8-20](#)
      - section number, [8-12](#), [8-20](#)
    - searching for a list by item, [8-18](#)
    - searching for a reserve list, [8-12](#)
    - searching for a reserve list from an open list, [8-18](#)
    - viewing course reserve history, [8-67](#)
  - Course section, [8-52](#), [8-55](#)
  - Create E-Item and Attach to New Bib and Holdings
    - Record dialog box, [8-41](#)
  - Create New Reserve List dialog box, [8-7](#), [8-10](#)
  - Created by/at field, [5-88](#), [8-68](#), [10-18](#)
  - Created field
    - Proxy Patron tab, [4-17](#), [4-148](#)
  - Created section, [11-14](#)
  - Created/by/at field
    - History tab, [4-18](#)
    - Item History tab, [5-11](#)
  - creating
    - bib/items, [8-30](#)
    - mailto URL, [1-9](#)
    - new reserve list, [8-7](#)
    - patron record, [4-19](#)
      - error and warning messages, [4-39](#)
    - proxy patron, [4-145](#), [4-148](#)
    - reserve lists, [8-20](#)
    - self check location, [C-3](#)
    - self check operator, [C-2](#)
  - creating order defaults, [11-15](#)
  - creating records on-the-fly, [5-37](#)
  - cron
    - archive short loan, [10-8](#)
  - Current Call Slips counter, [4-16](#)
  - Current Short Loans counter, [4-16](#)
  - customizing Bib tab fields, [5-39](#)

## D

- Damaged item status, [5-22](#)
- Date and Time section, [10-21](#)
- Date Applied field, [4-141](#), [5-15](#), [5-22](#)
- Date field, [4-88](#), [5-49](#), [D-13](#)
  - Backdate Discharge Time To... dialog box, [7-8](#)
  - Modify Due Date dialog box, [4-83](#), [6-19](#)
- Date Processed field, [4-117](#)
- date search limit, [3-57](#), [3-60](#)
- [Date] stanza, [3-62](#)
- Default Source button, [11-24](#)
- Default Source field, [11-14](#)
- Default Tab button, [3-19](#), [3-23](#), [3-29](#)
- default variables
  - Bib tab, [5-44](#)
- defaults
  - searching, [3-56](#)
- Delete button, [11-4](#)
- Delete Item Records check box, [5-55](#)
- Delete Patron Records check box, [4-63](#)
- deleting
  - a distributable item, [11-26](#)
  - barcode from an item record, [5-28](#)
  - course information, [8-64](#)
  - e-items, [8-51](#)
  - item record, [5-66](#)
  - patron note, [4-132](#)
  - patron record, [4-66](#), [4-69](#)
  - patron record information, [4-62](#)
  - proxy patrons, [4-153](#)
  - reserve list, [8-67](#)
  - search terms in builder search, [3-29](#)
- demerits, [D-1](#)
  - adding manually, [D-36](#)
  - applying real demerits, [D-34](#)
  - checking for suspensions, [D-31](#)
  - configuring, [D-18](#)
  - enabling, [D-18](#)
  - implementing, [D-15](#)
  - message
    - circulation module, [D-14](#)
    - webvoyage, [D-15](#)
  - posting against demerits, [D-34](#)
  - setting rate for patron group/item type combinations, [D-20](#)
  - setting up parameters, [D-18](#), [D-19](#)
  - summing demerits, [D-31](#)
  - system administration settings, [D-18](#)
    - webvoyage settings, [D-23](#)
- Demerits Apply check box, [D-5](#), [D-6](#), [D-19](#)
- Demerits field, [D-8](#), [D-21](#)
- Demerits History tab, [D-11](#)
- Department field, [4-14](#), [4-24](#), [4-45](#), [8-7](#)
- Department section, [8-52](#), [8-53](#)
- Dept. Code field, [8-54](#)
- Dept. Code radio button, [8-13](#)
- Dept. Name field, [8-54](#)
- Dept. Name radio button, [8-13](#)
- Dept/Inst/Course/Section dialog box, [8-53](#), [8-61](#)
- Description field, [4-88](#), [D-13](#)
  - Add Fine/Fee dialog box, [4-94](#), [4-102](#)
  - Post Against Fine/Fee dialog box, [7-12](#)
- Details tab, [4-12](#), [4-22](#), [4-23](#), [4-43](#), [4-44](#)
- dialog box
  - Add Bib/Item, [5-37](#), [5-38](#), [6-23](#), [8-31](#)
  - Add Demerits, [D-37](#)
  - Add E-Item and Holding To Existing Bib Record, [8-45](#)
  - Add E-Item To Existing Bib/Holding Record, [8-46](#)
  - Add E-Item to Reserve List, [8-48](#)
  - Add Fine/Fee, [4-94](#), [4-98](#)
  - Add Item, [5-56](#), [5-62](#)
  - Add New Item Barcode, [5-27](#)
  - Add New Patron, [4-19](#), [6-22](#)
  - Add New Patron Record, [4-19](#), [4-24](#), [4-27](#)
  - Backdate Discharge Time To, [7-8](#)
  - Browse Headings List, [3-26](#)
  - Change Item Types, [8-35](#)
  - Change Locations, [8-35](#)
  - Change Patron PIN, [4-71](#)
  - Charged Items Index, [4-5](#), [4-74](#), [4-77](#), [4-78](#), [4-79](#), [4-80](#), [4-83](#), [4-85](#), [6-11](#), [6-13](#), [6-21](#)
    - printing, [4-76](#), [4-89](#)
    - viewing
      - item information, [4-76](#)
  - Charged To, [4-159](#), [5-12](#)
  - Circulation Login, [1-2](#)
  - Create E-Item and Attach to New Bib and Holdings Record, [8-41](#)
  - Create New Reserve List, [8-7](#), [8-10](#)
  - Dept/Inst/Course/Section, [8-53](#), [8-61](#)
  - Discharge, [7-5](#)
  - Edit E-Item, [8-49](#)
  - Edit Item, [5-66](#)
  - Edit Patron Record, [4-41](#), [4-45](#), [4-48](#), [4-51](#)
  - Edit Reserve List Header, [8-11](#)
  - Enter Due Date for Offline Charge, [6-28](#)
  - Headings List, [3-39](#), [3-51](#), [3-54](#), [3-80](#), [3-81](#)
  - Holdings Index, [3-37](#), [3-38](#), [3-49](#), [3-75](#), [3-78](#)



---

In-Transit Details, [7-21](#)  
Item Barcode, [5-26](#)  
Item Circulation History, [5-30](#)  
Item Distribution Inventory, [11-12](#), [11-16](#), [11-23](#)  
Item Distribution Order, [11-19](#)  
Item Status, [5-23](#)  
Link Reserve List to Courses, [8-52](#), [8-58](#)  
Login Information, [1-5](#)  
Modify Due Date, [6-19](#)  
Multiple Items Found, [8-18](#)  
Multiple Reserve Lists Found, [8-16](#)  
Notes, [4-8](#), [4-127](#), [5-14](#)  
OPAC Call Slip Messages, [5-99](#)  
Outstanding Fines for this Item, [5-35](#), [5-36](#)  
Patron Blocked, [D-14](#)  
Patron Fines/Fees, [4-6](#), [4-86](#), [7-10](#), [D-11](#)  
Patron Record, [4-155](#)  
Patron Request Information, [4-7](#), [4-106](#), [6-24](#)  
Patron Search, [3-2](#), [3-5](#), [3-9](#), [6-7](#), [11-8](#)  
Patron Statistical Categories, [4-11](#), [4-140](#), [4-142](#),  
[4-144](#)  
Patron Suspension, [D-39](#)  
Place Request, [5-79](#), [5-84](#), [10-10](#)  
Post Against Fine/Fee, [4-91](#), [4-99](#), [7-11](#), [D-34](#)  
Print, [B-17](#)  
Proxy Patron Maintenance, [4-147](#), [4-149](#)  
Reference Information, [3-42](#), [3-43](#)  
Request Maintenance, [5-86](#), [5-90](#), [5-93](#), [5-97](#)  
Request Maintenance (for Short Loans), [10-16](#)  
Resequenece Items, [5-68](#), [5-69](#)  
Reserve List History, [8-68](#)  
Reserve List Search, [8-9](#), [8-12](#), [8-20](#)  
Retrieve Holdings, [3-88](#)  
Search, [3-11](#), [3-15](#), [3-16](#), [3-27](#), [6-7](#)  
Search by Item Barcode, [3-11](#), [5-33](#)  
Search Limits, [3-50](#), [3-54](#), [3-55](#), [3-57](#), [3-67](#)  
Select Current Location, [1-3](#)  
Select one or more authority records, [3-46](#)  
Session Preferences, [3-56](#)  
Set Patron Counters, [4-10](#), [4-135](#)  
Short Loan Date/Time, [10-12](#)  
Short Loan Search List, [10-22](#)  
Suspend Patron, [D-39](#)  
Titles Index, [3-31](#), [3-32](#), [3-48](#), [3-51](#), [3-54](#), [3-74](#),  
[3-75](#), [3-77](#), [3-80](#), [3-81](#), [3-83](#), [3-85](#)  
Vendor Search, [11-17](#)  
View Circulation History, [5-31](#)  
Discharge button, [4-76](#)  
Discharge check box, [7-2](#)  
discharge date override, [7-9](#)  
Discharge dialog box, [7-5](#)

Discharge menu  
    Paste Barcode, [7-19](#)  
discharge menu, [14-10](#)  
discharge slip, [4-81](#)  
discharge slip printing, [7-6](#)  
[Discharge Slip] stanza, [A-9](#), [A-11](#)  
Discharge work space, [7-2](#)  
Discharge Workspace  
    pasting barcodes, [7-19](#)  
Discharged field, [5-31](#)  
Discharged item status, [5-21](#)  
discharging  
    items  
        Charged Items Index dialog box, [4-80](#)  
Display Demerits check box, [D-5](#)  
Display Demerits field, [D-4](#)  
displaying  
    demerit information in WebVoyage, [D-23](#)  
    item information  
        Charged Items Index dialog box, [4-77](#)  
        multiple holdings, [3-88](#)  
        multiple items, [3-89](#)  
        search index, [8-20](#)  
        suspension information in WebVoyage, [D-24](#)  
Distribute button, [11-4](#)  
Distribute Item field, [11-2](#)  
distributing  
    item from the Charge work space, [11-6](#)  
    item from the Item Distribution window, [11-7](#)  
Distribution button, [11-4](#), [11-7](#), [11-15](#)  
distribution item order report, [11-25](#)  
document summary, [xx](#)  
due date  
    backdating, [7-6](#)  
    offline charge, [6-29](#)  
Due Date field, [4-76](#), [5-12](#), [6-7](#)  
[Due Date Slip] stanza, [A-4](#), [A-7](#), [C-14](#)  
[Due Date Slip-patron group] stanza, [A-7](#)  
due dates  
    Modifying Due Date dialog box, [6-18](#)  
dynamic noise word reduction, [3-20](#)

---

## E

Edit button, [8-53](#)  
Edit E-Item dialog box, [8-49](#)  
Edit Item dialog box, [5-66](#)  
Edit Patron Record dialog box, [4-41](#), [4-45](#), [4-48](#), [4-](#)



- 51
    - Address tab, [4-48](#)
    - Barcode tab, [4-45](#)
  - Edit Reserve List Header dialog box, [8-11](#)
  - editing
    - charge timeout value, [1-8](#)
    - course information, [8-63](#)
    - e-items, [8-49](#)
    - hold request, [4-113](#)
    - item record, [5-55](#), [5-65](#)
    - patron record, [4-41](#), [4-52](#)
    - patron suspension end dates, [D-40](#)
    - recall request, [4-113](#)
    - requests, [5-86](#)
    - reserve list header, [8-11](#)
    - search terms in builder search, [3-29](#)
  - editing functions, [14-3](#)
  - Edition field, [5-6](#), [5-50](#)
  - Effective (dates) field, [8-10](#)
  - effective dates, [4-55](#)
  - Effective field, [8-5](#), [8-8](#)
  - E-Item Caption field, [8-6](#)
  - E-Item Count field, [8-5](#)
  - E-Item ID field, [8-6](#)
  - e-items (electronic items), [8-3](#)
  - E-Items tab, [8-3](#), [8-5](#), [8-39](#)
  - E-mail address type, [4-14](#), [4-55](#)
  - E-mail control button, [1-9](#), [4-3](#), [4-4](#), [6-5](#)
  - e-mailing
    - creating the mailto URL, [1-9](#)
    - patrons from circulation, [4-154](#)
    - patrons from the Charge work space, [4-157](#)
    - patrons from the Charged To dialog box, [4-159](#)
    - patrons from the patron record, [4-155](#)
  - enabling demerits, [D-18](#)
  - End Time field, [4-123](#), [10-17](#)
  - ending
    - action codes, [B-6](#)
  - Ends field, [8-56](#)
  - Enter Due Date for Offline Charge dialog box, [6-28](#)
  - entering information
    - keyboard equivalents, [14-2](#)
  - Enum field, [8-6](#)
  - Enum/Chron field, [10-21](#), [11-4](#)
  - Enumeration field, [4-117](#), [5-3](#), [5-8](#), [5-13](#), [5-51](#), [5-58](#), [5-68](#)
  - error messages, [4-39](#), [4-47](#)
  - exceptdates.cfg file, [D-24](#), [D-26](#)
  - exception dates, [D-3](#)
  - exclamation point (!), [3-18](#)
  - exiting
    - circulation, [1-6](#)
    - self check, [C-22](#)
  - Expected Date field, [11-4](#)
  - Expiration Date field, [4-150](#)
  - Expires
    - History tab, [4-18](#)
  - Expires field, [4-13](#), [4-23](#), [4-45](#), [4-109](#), [5-82](#), [5-88](#)
  - Proxy Patron tab, [4-17](#), [4-147](#)
- 
- ## F
- fee
    - accept payment, [7-10](#)
    - accepting payment, [7-10](#)
    - prompt off, [7-10](#)
  - Fee field, [4-88](#), [D-13](#)
  - Fee Type field, [4-93](#)
  - Fee/Posting Type field, [4-88](#), [D-13](#)
  - feedback, customer, [xxiii](#)
  - field, [4-128](#), [5-31](#), [5-53](#), [5-81](#)
    - 007 control
      - position 01, [3-64](#)
    - 008 control
      - position 06, [3-67](#)
      - position 07-10, [3-63](#)
      - position 15-17, [3-66](#)
      - position 35-37, [3-62](#)
  - Active Barcode, [11-4](#)
  - Active?, [11-3](#)
  - Address, [5-12](#)
  - Address display, [4-14](#)
  - Address Type, [4-14](#)
  - Amount, [4-93](#), [5-35](#)
    - Posting Against Fine/Fee dialog box, [4-101](#), [7-12](#)
  - Author, [5-6](#), [5-49](#), [8-6](#)
  - Balance, [4-88](#), [D-13](#)
  - Barcode, [3-4](#), [3-76](#), [4-47](#), [4-88](#), [4-109](#), [4-116](#), [4-122](#), [4-123](#), [5-3](#), [5-13](#), [5-35](#), [5-60](#), [5-68](#), [5-81](#), [5-88](#), [6-5](#), [6-6](#), [8-6](#), [10-17](#), [D-13](#)
    - Patron Id tab, [4-12](#)
    - Proxy Patron Maintenance dialog box, [4-150](#)
  - Begins, [8-56](#)
  - Birth Date, [4-14](#), [4-24](#), [4-45](#)
  - Call No., [5-8](#)
  - Call No. Type, [5-8](#), [5-51](#), [5-57](#), [5-68](#)
  - Call Number, [5-7](#), [5-51](#), [5-57](#), [5-68](#), [8-6](#), [10-21](#), [11-4](#)

---

Call Number Type, [5-7](#)  
Cancel Request, [10-21](#)  
Cancel S/L, [10-18](#)  
Caption, [5-8](#), [5-51](#), [5-58](#)  
Charge Date, [5-12](#)  
Chron, [8-6](#)  
Chronology, [4-117](#), [5-3](#), [5-8](#), [5-13](#), [5-51](#), [5-58](#), [5-68](#)  
City, [4-27](#), [4-50](#)  
Condition, [11-3](#)  
confirm PIN, [4-72](#)  
Copy, [5-3](#), [5-13](#), [5-53](#), [5-60](#), [5-68](#), [5-87](#), [10-17](#)  
Country, [4-27](#), [4-51](#)  
Course, [8-7](#)  
Course Name, [8-56](#)  
Course No., [8-56](#)  
Created, [4-17](#), [4-148](#)  
Created by/at, [5-88](#), [8-68](#), [10-18](#)  
Created/by/at  
    History tab, [4-18](#)  
    Item History tab, [5-11](#)  
Date, [4-88](#), [5-49](#), [D-13](#)  
    Backdate Discharge Time To... dialog box, [7-8](#)  
    Modify Due Date dialog box, [4-83](#), [6-19](#)  
Date Applied, [4-141](#), [5-15](#), [5-22](#)  
Date Processed, [4-117](#)  
Default Source, [11-14](#)  
Demerits, [D-8](#), [D-21](#)  
Department, [4-14](#), [4-24](#), [4-45](#), [8-7](#)  
Dept. Code, [8-54](#)  
Dept. Name, [8-54](#)  
Description, [4-88](#), [D-13](#)  
    Add Fine/Fee dialog box, [4-94](#), [4-102](#)  
    Post Against Fine/Fee dialog box, [7-12](#)  
Discharged, [5-31](#)  
Display Demerits, [D-4](#)  
Distribute Item, [11-2](#)  
Due Date, [4-76](#), [5-12](#), [6-7](#)  
Edition, [5-6](#), [5-50](#)  
Effective, [8-5](#), [8-8](#)  
Effective (dates), [8-10](#)  
E-Item Caption, [8-6](#)  
E-Item Count, [8-5](#)  
E-Item ID, [8-6](#)  
End Time, [4-123](#), [10-17](#)  
Ends, [8-56](#)  
Enum, [8-6](#)  
Enum/Chron, [10-21](#), [11-4](#)  
Enumeration, [4-117](#), [5-3](#), [5-8](#), [5-13](#), [5-51](#), [5-58](#), [5-68](#)  
Expected Date, [11-4](#)  
Expiration Date, [4-150](#)  
Expires, [4-13](#), [4-17](#), [4-23](#), [4-45](#), [4-109](#), [4-147](#), [5-82](#), [5-88](#)  
Fee, [4-88](#), [D-13](#)  
Fee Type, [4-93](#)  
Fee/Posting Type, [4-88](#), [D-13](#)  
Fines, Fees and Demerits for Location, [4-88](#), [4-91](#), [D-13](#)  
First, [3-3](#), [4-3](#), [4-21](#), [4-42](#)  
First Name, [8-55](#)  
For Items At, [5-82](#)  
Free Text, [5-8](#), [5-51](#), [5-58](#)  
From, [10-21](#)  
Group, [6-5](#)  
Historical Bookings, [5-10](#)  
Historical Browsers, [5-10](#)  
Historical Charges, [5-10](#)  
Historical Reserve Charges, [5-10](#)  
Holdings Location, [4-117](#)  
Holds Placed, [5-10](#)  
Inactive Barcodes, [5-28](#)  
Institution ID, [3-4](#)  
Institution ID, [4-4](#), [4-21](#), [4-42](#)  
Institution Id  
    Patron Id tab, [4-12](#)  
Instructor, [8-7](#)  
ISBN, [5-6](#), [5-49](#)  
ISSN, [5-6](#)  
Item Available Notice Sent, [5-88](#)  
Item Barcode, [4-75](#), [4-93](#), [6-7](#)  
    Charge window, [7-6](#)  
Item Count, [8-5](#)  
Item Location, [4-75](#), [10-21](#)  
Item Status, [5-3](#), [5-68](#), [5-87](#), [10-17](#), [10-21](#)  
Item Type, [4-75](#), [5-3](#), [5-9](#), [5-52](#), [5-59](#), [5-68](#), [5-87](#), [8-5](#), [8-6](#), [10-17](#)  
Items, [5-88](#)  
Language, [5-49](#)  
Last, [3-3](#), [4-3](#), [4-21](#), [4-42](#)  
Last Name, [8-55](#)  
Last Transaction, [5-11](#)  
LCCN, [5-6](#), [5-50](#)  
Leader control  
    position 06, [3-65](#)  
    position 07, [3-65](#)  
Level, [5-88](#)  
Library, [3-3](#), [7-3](#)  
Line 1 address, [4-26](#), [4-50](#)  
Link Caption, [8-42](#), [8-45](#), [8-47](#)  
Link/URL, [8-6](#), [8-42](#), [8-45](#), [8-47](#)  
List Name, [8-5](#), [8-8](#), [8-68](#)

- Create New Reserve List dialog box, 8-10
- Location, 4-88, 5-3, 5-8, 5-51, 5-57, 5-68, 8-5, 8-6, 11-4, D-13
- Location Group, 5-88
- Location Name, 5-7, 5-68
- Locations List box, 1-3
- Major, 4-14, 4-24, 4-45
- Max Demerit
  - Patron Group Definitions dialog box, D-5, D-6, D-19
- Max Demerits
  - Circulation Matrix Definitions dialog box, D-8, D-21
- Max Recall Demerits
  - Circulation Matrix Definitions dialog box, D-9, D-21
- Media Type, 5-9, 5-52, 5-59
- Method, 4-101, 7-12
- Middle, 3-4, 4-3, 4-21, 4-42
- Name, 4-75, 4-88, 4-109, 4-116, 4-122, 4-141, 5-80, D-13
- Name Type, 4-3, 4-42
- name Type, 4-21
- New Barcode, 4-25
- New PIN, 4-71
- No-Fill Reason, 4-117
- Note, 5-88, 10-18
- Note Type, 4-128
- OCLC Number, 5-49
- On Reserve, 8-6
- On-Hand, 11-4
- On-Hand Quantity, 11-13, 11-17, 11-24
- OPAC Circ Desk, 10-20
- Operator, 11-3
- Operator ID, 1-2
- Operator Id
  - Patron Id tab, 4-12
- Order Quantity, 11-14, 11-17, 11-24
- Owning Library, 5-6
- Password, 1-2
- Patron Barcode, 4-17, 4-147, 5-12, 5-31, 10-21
- Patron Group, 4-17, 4-25, 4-147
  - Patron Id tab, 4-12
- Patron ID, 3-4
- Patron Name, 4-17, 4-147, 5-31, 5-35, 5-88, 6-5, 10-17, 10-21
- Patron Title, 4-42
- Perm. Location, 5-9
- Permanent Location, 5-87, 10-17
- Phone, 4-28, 4-52
- Phone Type, 4-52
- Pickup At, 5-82
- Pickup Location, 4-109, 4-117, 4-122, 4-123, 5-88, 10-17, 10-21
- Pieces, 5-9, 5-53, 5-60
- Place, 5-49, 5-50
- Place/Date, 5-6
- Posting, 4-88, D-13
- Posting Type, 4-101, 7-12
- Price, 5-9, 5-53, 5-60
- Proxies for, 4-17, 4-147
- Proxy, 6-5, 6-16
- Proxy Patron, 5-12
- Pub. No., 5-6
- Publisher, 5-6, 5-50
- Publishers identification Number, 5-50
- Purge Date, 4-14, 4-24, 4-45
- Quantity, 11-19
- Quantity Received, 11-22
- Rank, 4-109, 5-88
- Recall Demerits, D-8, D-21
- Recalled, 5-12, 5-31
- Recalls Placed
  - Item Histroy tab, 5-10
- Renewal Date, 5-12
- Renewal Due Date, 5-12
- Renewed, 5-31
- Reorder Point, 11-14, 11-24
- Requested, 4-116
- Reserve Charges, 5-10
- Reserve Item Type
  - Create New Reserve List dialog box, 8-10
- Reserve Location, 8-8
  - Create New Reserve List dialog box, 8-10
- Resrve Item Type, 8-8
- Search, 8-14, 10-21
- Search By, 3-3, 11-3
- Search For, 3-18, 3-23, 11-3
- Search for, 3-28
- Search In, 3-29
- search type drop-down, 3-22
- Section, 8-7
- Section No., 8-57
- Series, 5-6, 5-50
- Set short loan advance booking days displayed, 10-7
- Short Loan Charges, 5-10
- Short Loan Status, 10-21
- SMS Number, 4-23, 4-44
- social security number (SSN), 3-4, 4-4, 4-22, 4-43
  - Patron Id tab, 4-12

---

Spine, [5-53](#), [5-60](#)  
Spine Label, [5-9](#)  
Sponsor Name, [4-147](#)  
Start Time, [4-123](#), [10-17](#), [10-21](#)  
State/Province, [4-50](#)  
Statistical Category, [4-141](#), [5-15](#), [5-22](#)  
Statistical Category List, [4-142](#)  
Status, [4-47](#), [4-76](#), [5-88](#), [6-7](#), [10-17](#)  
Status Date, [5-88](#), [10-17](#)  
Status/Date, [4-117](#)  
    Patron Id tab, [4-12](#)  
Suspension Days, [D-5](#), [D-6](#), [D-20](#)  
Suspension End Date, [D-39](#)  
System No., [5-6](#)  
Temp. Item Type, [5-9](#)  
Temp. Location, [5-9](#)  
Template  
    Add Bib/Item dialog box, [5-55](#)  
    Create E-item and Attach New Bib and Holdings  
        Record, [8-42](#)  
Temporary Location, [5-52](#), [5-59](#), [5-87](#), [10-17](#)  
Time  
    Backdate Discharge Time To..., [7-8](#)  
    Modify Due Date, [4-84](#), [6-19](#)  
Title, [4-75](#), [4-88](#), [4-109](#), [4-116](#), [4-122](#), [4-123](#), [5-2](#),  
    [5-31](#), [5-35](#), [5-50](#), [5-55](#), [5-57](#), [5-58](#), [5-59](#), [5-68](#), [5-81](#), [5-87](#), [6-6](#), [8-6](#), [8-55](#), [10-21](#), [11-3](#), [D-13](#)  
To, [10-21](#)  
Total, [4-75](#)  
Total Distributed, [11-13](#), [11-28](#)  
Total Due, [4-88](#), [D-13](#)  
Total fines displayed, [4-88](#), [D-13](#)  
Total Selected, [4-88](#)  
Total Students, [8-57](#)  
Type, [4-49](#), [4-109](#), [5-88](#)  
Updated by/at, [8-68](#)  
Updated/by/at, [5-11](#), [10-18](#)  
Use Demerits, [D-4](#)  
Year, [4-117](#), [5-8](#), [5-51](#), [5-58](#)  
Zip/Postal, [4-27](#), [4-50](#)  
field codes, [B-5](#)  
field variables  
    Bib tab, [5-45](#)  
fieldState/Province, [4-27](#)  
file  
    configuration  
        circbib.cfg, [5-37](#), [5-39](#), [5-45](#)  
        exceptdates.cfg, [D-24](#), [D-26](#)  
        spinelabel.cfg, [B-1](#)  
    initialization  
        circ.ini, [A-3](#)  
        CircSC.ini, [C-1](#), [C-6](#)  
        opac.ini, [D-23](#)  
        voyager, [5-74](#)  
        voyager.ini, [1-7](#)  
    initialization  
        limits.ini, [3-59](#)  
    offline capture, [6-26](#)  
    Voyager.ini, [3-35](#)  
file menu, [14-4](#)  
filed  
    Call Number, [4-75](#)  
Find radio button, [3-21](#)  
find search, [3-25](#), [3-50](#)  
fine  
    accept payments, [7-10](#)  
    accepting payment, [7-10](#)  
    prompt off, [7-10](#)  
fine/fee  
    adding, [4-89](#), [4-94](#), [4-97](#)  
    from Charge/Renew window, [4-96](#)  
    posting against, [4-91](#), [4-99](#)  
    from Charge/Renew window, [4-103](#)  
    from Discharge window, [4-103](#)  
    from Patron window, [4-102](#)  
    printing fine/fee statement, [4-104](#)  
fine/fee information, [4-86](#)  
[Fine/Fee Payment Receipt] stanza, [A-18](#)  
Fine/Fee Reason tab, [D-10](#)  
Fine/Fee Reasons screen, [D-9](#)  
[Fine/Fees Statement] stanza, [A-21](#)  
Fines, Fees and Demerits for Location field, [4-88](#), [4-91](#), [D-13](#)  
Fines/Fees button, [4-3](#), [4-6](#), [6-6](#)  
Fines/Fees History tab, [4-87](#)  
First field, [3-3](#), [4-3](#), [4-21](#), [4-42](#)  
First Name field, [8-55](#)  
font  
    barcode 3 of 9, [B-7](#)  
Font drop-down list, [5-73](#)  
For Items At field, [5-82](#)  
forgive demerits, [D-3](#)  
Free Text field, [5-8](#), [5-51](#), [5-58](#)  
Free text keyword search, [3-74](#), [3-76](#)  
Free Text radio button, [3-17](#)  
From field, [10-21](#)  
functions  
    circulation window, [14-2](#)  
    course reserve, [8-1](#)  
    item distribution, [11-1](#)  
functions menu, [14-4](#)

---

## G

general note, [4-127](#), [4-128](#)  
[General] stanza, [C-6](#)  
generic field code, [B-8](#)  
Getting Started, [1-1](#)  
    prerequisite skills and knowledge, [1-1](#)  
Group, [5-81](#)  
Group field, [5-81](#), [6-5](#)

---

## H

Heading column  
    Headings List, [3-42](#)  
Heading Type column  
    Headings List, [3-42](#)  
Heading Types Filter, [3-22](#), [3-50](#)  
Headings List, [3-87](#)  
    Bibs column, [3-42](#)  
    Heading column, [3-42](#)  
    Heading Type column, [3-42](#)  
Headings List dialog box, [3-39](#), [3-51](#), [3-54](#), [3-80](#), [3-81](#)  
headings search  
    results, [3-42](#)  
headings searching, [3-20](#), [3-49](#), [3-80](#)  
help menu, [14-7](#)  
Historical Bookings field, [5-10](#)  
Historical Browsers field, [5-10](#)  
Historical Call Slips counter, [4-16](#)  
Historical Charges counter, [4-16](#)  
Historical Charges field, [5-10](#)  
Historical Distributions, [11-29](#)  
Historical Distributions counter, [4-16](#)  
Historical Reserve Charges field, [5-10](#)  
Historical Short Loans counter, [4-16](#)  
History tab, [3-31](#), [3-54](#), [4-4](#)  
    patron record, [4-17](#)  
history tab  
    searching, [3-31](#)  
Hold Mail check box, [4-50](#), [4-55](#), [4-154](#)  
Hold Recalls tab  
    accessing, [4-110](#)  
hold request  
    activating, [5-77](#)  
    canceling, [4-111](#), [5-89](#)  
    charging, [4-112](#)  
    description, [5-77](#)  
    editing, [4-113](#), [5-92](#)  
    patron, [4-106](#)  
    placing, [5-83](#)  
    resequencing, [5-96](#)  
Hold Request item status, [5-21](#)  
hold slip printing, [7-6](#)  
[Hold Slip] stanza, [A-11](#)  
holdings  
    displaying multiple, [3-88](#)  
    field codes, [B-9](#)  
    record  
        adding, [5-37](#)  
        viewing, [5-75](#)  
Holdings Boolean keyword search, [3-75](#), [3-78](#)  
Holdings Boolean radio button, [3-17](#)  
holdings boolean search  
    results, [3-37](#), [3-39](#)  
Holdings Index  
    Holdings Record column, [3-39](#)  
Holdings Index dialog box, [3-37](#), [3-38](#), [3-49](#), [3-75](#), [3-78](#)  
holdings keyword definition  
    SPAC, [3-72](#)  
Holdings Location field, [4-117](#)  
Holdings Record column  
    Holdings Index, [3-39](#)  
Holdings tab, [5-39](#)  
    Add Bib/Item dialog box, [5-50](#)  
    item record, [5-4](#), [5-6](#)  
Holdings/Item tab, [5-62](#)  
Holds and Recalls tab, [4-108](#)  
Holds Placed counter, [4-16](#)  
Holds Placed field, [5-10](#)  
Home circulation cluster  
    The home Circulation Cluster is the Circulation Cluster to which a patron or an item belong., [2-5](#)  
home circulation cluster  
    definition, [2-5](#)  
http POST request, [5-74](#)

---

## I

implementing  
    demerits, [D-15](#)  
    short loan, [10-3](#)  
In Process item status, [5-20](#)

---

- In transit discharged item status, [5-20](#)
- In transit item status, [5-20](#)
- In transit on hold item status, [5-21](#)
- Inactive Barcodes field, [5-28](#)
- index selection
  - searching, [3-20](#), [3-49](#)
- Index Selection tab, [3-21](#)
- index selection tab, [3-49](#)
- inilization file
  - voyager.ini, [5-74](#)
- initialization file
  - circ.ini, [A-3](#)
  - CircSC.ini, [C-1](#), [C-6](#)
  - limits.ini, [3-59](#)
  - opac.ini, [D-23](#)
  - voyager.ini, [1-7](#)
- initiating
  - action codes, [B-6](#)
- installing
  - voyager client, [1-2](#)
- Institution ID field, [3-4](#), [4-4](#), [4-21](#), [4-42](#)
- Institution Id field
  - Patron Id tab, [4-12](#)
- institution id number
  - searching by, [3-6](#)
- Instructor field, [8-7](#)
- Instructor radio button, [8-13](#)
- Instructor section, [8-52](#), [8-54](#)
- intended audience
  - of this document, [xix](#)
- In-Transit Details dialog box, [7-21](#)
- In-Transit Discharged item status, [7-21](#)
- In-Transit item status, [7-21](#)
- In-Transit items
  - tracking, [7-20](#), [7-23](#)
  - tracking exceptions, [7-23](#)
- In-Transit on Hold item status, [7-21](#)
- Inventory button, [11-4](#), [11-16](#)
- inventory information
  - updating, [11-23](#)
- ISBN field, [5-6](#), [5-49](#)
- ISSN field, [5-6](#)
- Item, [10-17](#)
- item
  - adding/editing record, [5-55](#)
  - definition, [2-4](#)
  - displaying multiple items, [3-89](#)
  - e-items (electronic items), [8-3](#)
  - field codes, [B-9](#)
  - lost, [4-137](#)
  - physical, [8-3](#)

- renewing, [6-11](#)
- searching by barcode, [3-11](#)
- statistical categories, [5-15](#)
- status, [5-19](#)
- viewing circulation histroy, [5-33](#)
- viewing outstanding fines, [5-34](#), [5-35](#)
- Item Available Notice Sent field, [5-88](#)
- Item Barcode, [5-53](#)
- Item Barcode dialog box, [5-26](#)
- Item Barcode field, [4-75](#), [4-93](#), [5-53](#), [6-7](#)
  - Charge window, [7-6](#)
- Item Barcode radio button, [8-13](#)
- item block
  - overriding, [9-3](#)
- item blocks, [9-1](#)
- Item button, [3-12](#)
- Item Circulation History dialog box, [5-30](#)
- Item Count field, [8-5](#)
- Item Details tab, [5-4](#), [5-8](#)
- item distribution
  - automatic ordering, [11-25](#)
  - creating order defaults, [11-15](#)
  - deleting a distributable item, [11-26](#)
  - distributing an item
    - from the Charge work space, [11-6](#)
    - from the Item Distribution window, [11-7](#)
  - function, [11-1](#)
  - Historical Distributions, [11-29](#)
  - making items distributable, [11-15](#)
  - manually ordering distributable items, [11-19](#)
  - printing distributable item list, [11-30](#)
  - receiving orders, [11-20](#)
  - searching, [11-4](#)
  - updating inventory information, [11-23](#)
  - viewing, [11-4](#)
  - viewing items distributed, [11-27](#)
  - viewing items distributed to specific patron, [11-28](#)
- Item Distribution Inventory dialog box, [11-12](#), [11-16](#), [11-23](#)
- Item Distribution Order dialog box, [11-19](#)
- Item Distribution Receive dialog box, [11-21](#)
- [Item Distribution] stanza, [A-49](#)
- Item Distribution work space, [11-2](#)
- Item Distributions (historical) counter, [4-138](#)
- Item History tab, [5-4](#), [5-9](#)
- Item Info... button, [4-76](#), [4-89](#), [D-14](#)
- Item Location field, [4-75](#), [10-21](#)
- Item menu
  - Copy Barcode, [5-29](#)
- item menu, [14-17](#)
- Item Record

- copying barcodes, 5-29
- item record, 3-14, 5-1
  - adding, 5-37, 5-55
  - applying an item statistical category, 5-16
  - applying an item status, 5-23
  - assigning new barcode, 5-26
  - Bib Brief tab, 5-4, 5-5
  - deleting, 5-66
  - deleting a barcode, 5-28
  - editing, 5-65
  - Holdings tab, 5-4, 5-6
  - Item Details tab, 5-4, 5-8
  - Item History tab, 5-4, 5-9
  - Item/Holdings tab, 5-4, 5-7
  - linking to existing holdings, 5-61
  - removing an item statistical category, 5-18
  - removing an item status, 5-25
  - resequencing, 5-67
  - viewing, 5-2
- Item Statistical Categories dialog box
  - accessing, 5-16
- item statistical category
  - removing, 5-18
- Item status, 5-19
- item status
  - applying, 5-23
  - At bindery, 5-20
  - Call Slip Request, 5-21
  - Catalog Review, 5-21
  - Charged, 5-20
  - Circulation Review, 5-21
  - Claims returned, 5-21
  - Damaged, 5-22
  - Discharged, 5-21
  - displaying in module, 5-20
  - Hold Request, 5-21
  - In Process, 5-20
  - In transit, 5-20
  - In transit discharged, 5-20
  - In transit on hold, 5-21
  - In-Transit, 7-21
  - In-Transit Discharged, 7-21
  - In-Transit on Hold, 7-21
  - Lost-Library Applied, 5-20
  - Lost-System Applied, 5-20
  - Missing, 5-20
  - Not Charged, 5-21
  - On hold, 5-20
  - Overdue, 5-20
  - rank, 5-20
  - Recall Request, 5-21

- Remote Storage Request, 5-21
- removing, 5-25
- removing when discharging, 7-13
- Renewed, 5-20
- Scheduled, 5-20
- Short Loan Request, 5-21
- Withdrawn, 5-22
- Item Status dialog box, 5-23
  - accessing, 5-22
- Item Status field, 5-3, 5-68, 5-87, 10-17, 10-21
- item statuses, 5-20
- Item submenu
  - Paste Barcode, 6-20
- Item tab
  - Add Bib/Item dialog box, 5-51
  - Add Item dialog box, 5-63
- item type
  - definition, 2-4
- Item Type field, 4-75, 5-9, 5-52, 5-59, 5-68, 5-87, 8-5, 8-6, 10-17
- Item type field, 5-3
- Item/Holdings tab, 5-4, 5-7
- items
  - charging, 6-8
  - In-Transit tracking, 7-20, 7-23
  - In-Transit tracking exceptions, 7-23
- Items Available for Pickup list, 4-110
- Items Borrowed (historical) counter, 4-136
- Items field, 5-88
- Items Recalled counter, 4-16
- Items tab, 5-39, 8-3, 8-5, 8-23

---

## J

- journal index searching, 3-29

---

## K

- key
  - ChargeTimeout, 1-7
  - ResetTime, C-21
- keyboard equivalents
  - entering information, 14-2
  - selecting options, 14-2
- keyboard shortcuts, 14-2

---

keyword search  
  Boolean, [3-74](#)  
  Free text, [3-74](#), [3-76](#)  
  Holdings Boolean, [3-75](#), [3-78](#)  
  results, [3-31](#), [3-33](#)  
keyword searching, [3-16](#), [3-47](#)  
  Circulation, [3-74](#)  
Keyword tab, [3-16](#), [3-47](#)

---

## L

label  
  action codes, [B-5](#), [B-6](#)  
  changing font size, [B-8](#)  
  field codes, [B-5](#)  
  inserting a blank line, [B-8](#)  
  inserting a tab, [B-8](#)  
  printing, [B-16](#)  
  printing field information, [B-7](#)  
  spine and piece, [B-1](#)  
Language field, [5-49](#)  
language search limit, [3-57](#), [3-60](#)  
[Language] stanza, [3-61](#), [C-10](#)  
Last field, [3-3](#), [4-3](#), [4-21](#), [4-42](#)  
Last Name field, [8-55](#)  
Last Transaction field, [5-11](#)  
Last Updated section, [11-14](#)  
LCCN field, [5-6](#), [5-50](#)  
Leader control field  
  position 06, [3-65](#)  
  position 07, [3-65](#)  
left-anchored search  
  results, [3-33](#)  
left-anchored searching, [3-20](#), [3-49](#), [3-80](#), [3-82](#)  
Level field, [5-88](#)  
library address field codes, [B-10](#)  
Library Administrative Request, [5-81](#)  
Library field, [3-3](#), [7-3](#)  
limit  
  maximum items borrowed, [6-11](#)  
Limit button, [3-19](#), [3-24](#), [3-30](#), [3-67](#)  
limiting your search, [3-57](#)  
  not allowed, [3-57](#)  
[Limits] stanza, [3-60](#)  
limits.ini file, [3-57](#), [3-59](#)  
Line 1 address field, [4-26](#), [4-50](#)  
Link button, [8-53](#)  
Link Caption field, [8-42](#), [8-45](#), [8-47](#)

Link Reserve List to Courses dialog box, [8-52](#), [8-58](#)  
Link/URL field, [8-6](#), [8-42](#), [8-45](#), [8-47](#)  
Linked Courses section, [8-3](#), [8-7](#)  
linking  
  item record to existing holdings, [5-61](#)  
  reserve lists to course information, [8-52](#), [8-57](#)  
list  
  Posting Type, [D-35](#)  
list box  
  Operator may Override, [9-3](#)  
List Dates radio button, [8-13](#)  
List Name field, [8-5](#), [8-8](#), [8-68](#)  
  Create New Reserve List dialog box, [8-10](#)  
List Name radio button, [8-13](#)  
listbar  
  circulation, [2-5](#)  
location  
  adding to circ policy definition for self check, [C-4](#)  
  selecting circulation location, [1-3](#)  
  self check, [C-3](#)  
Location field, [4-88](#), [5-3](#), [5-8](#), [5-51](#), [5-57](#), [5-68](#), [8-5](#),  
  [8-6](#), [11-4](#), [D-13](#)  
Location Group field, [5-88](#)  
Location Name field, [5-7](#), [5-68](#)  
location search limit, [3-57](#), [3-60](#)  
Locations Filter, [3-50](#)  
Locations Filter List, [3-23](#)  
Locations list box field, [1-3](#)  
logging in, [1-2](#)  
  single client login, [1-5](#)  
login  
  viewing information, [1-5](#)  
Login Information dialog box, [1-5](#)  
lost interval, [4-137](#)  
lost item, [4-137](#)  
lost item refund processing, [7-15](#)  
Lost Items counter, [4-16](#), [4-137](#)  
Lost-Library Applied item status, [5-20](#)  
Lost-System Applied item status, [5-20](#)

---

## M

magnetic media self check flag, [5-9](#)  
mailto URL  
  creating, [1-9](#)  
maintaining  
  item requests, [5-86](#)  
  short loan, [10-16](#)



Major field, [4-14](#), [4-24](#), [4-45](#)  
making  
    item distributable, [11-15](#)  
    item short loanable, [10-5](#)  
MARC bibliographic record, viewing, [5-71](#)  
MARC holdings record, viewing, [5-75](#)  
MARC record, [3-51](#), [5-74](#)  
    send to web server, [5-74](#)  
[MARC Record] stanza, [A-39](#)  
MARC standards, [3-61](#)  
MARC... button, [3-51](#)  
masking  
    social security number, [3-4](#)  
    social security number (SSN), [4-4](#), [4-12](#), [4-22](#), [4-43](#)  
Max Demerit field  
    Patron Group Definitions dialog box, [D-5](#), [D-6](#), [D-19](#)  
Max Demerits field  
    Circulation Matrix Definitions dialog box, [D-8](#), [D-21](#)  
Max Recall Demerits field  
    Circulation Matrix Definitions dialog box, [D-9](#), [D-21](#)  
maximum items borrowed limit, [6-11](#)  
Media Type field, [5-9](#), [5-52](#), [5-59](#)  
medium search limit, [3-57](#), [3-60](#)  
[Medium] stanza, [3-63](#)  
menu  
    File, [14-3](#)  
    Help, [14-7](#)  
    Options, [14-6](#)  
message  
    no patron information, [5-31](#)  
message, call slip request, [5-99](#)  
Method field, [4-101](#), [7-12](#)  
MFHD keyword index searching, [3-29](#)  
MFHD, viewing, [5-75](#)  
MFHD-Bibliographic Combined Keyword Search, [3-70](#)  
Middle field, [3-4](#), [4-3](#), [4-21](#), [4-42](#)  
Minus button, [8-53](#)  
Miscellaneous screen, [D-4](#)  
Missing item status, [5-20](#)  
Modify Due Date dialog box, [6-19](#)  
modifying  
    fine/fee, [4-97](#)  
modifying due dates  
    Modify Due Dates dialog box, [6-18](#)  
Multiple Items Found dialog box, [8-18](#)  
multiple items match search criteria, [3-87](#)

multiple patrons match search criteria, [3-9](#)  
Multiple Reserve Lists Found dialog box, [8-16](#)

---

## N

name  
    searching by, [3-6](#)  
Name field, [4-75](#), [4-88](#), [4-109](#), [4-116](#), [4-122](#), [4-141](#), [5-80](#), [D-13](#)  
Name tab, [4-20](#), [4-21](#), [4-41](#), [4-42](#)  
Name Type field, [4-3](#), [4-21](#), [4-42](#)  
narrower term, [3-44](#)  
New Barcode field, [4-25](#)  
New Operator button, [C-2](#)  
New PIN field, [4-71](#)  
no patron information message, [5-31](#)  
No-Fill Reason field, [4-117](#)  
NOISEWORDFILTER, [3-20](#)  
non-keyword searching  
    Circulation, [3-80](#)  
Not Charged item status, [5-21](#)  
note  
    address, [4-127](#), [4-128](#)  
    barcode, [4-127](#), [4-128](#)  
    general, [4-127](#), [4-128](#)  
    patron record, [4-126](#)  
    phone, [4-127](#), [4-128](#)  
    pop-up, [4-128](#)  
Note additional references, [3-40](#), [3-42](#)  
Note field, [5-88](#), [10-18](#)  
Note Type field, [4-128](#)  
Notes button, [4-3](#), [4-8](#), [5-3](#), [5-14](#), [6-6](#)  
Notes dialog box, [4-8](#), [4-127](#), [5-14](#)  
    accessing, [4-129](#)

---

## O

OCLC Number field, [5-49](#)  
Off Reserve  
    placing items Off Reserve, [8-38](#)  
offline capture file, [6-26](#)  
    uploading, [6-30](#)  
offline charge, [6-25](#)  
    charging items, [6-28](#)  
    due date, [6-29](#)

---

- errors, [6-31](#)
- uploading the offline capture file, [6-30](#)
- On hold item status, [5-20](#)
- On Reserve
  - placing items On Reserve, [8-36](#)
- On Reserve field, [8-6](#)
- On-Hand field, [11-4](#)
- On-Hand Quantity field, [11-13](#), [11-17](#), [11-24](#)
- On-line shelf list, [3-23](#)
- on-the-fly
  - adding records, [5-37](#)
  - creating bib/item records, [8-30](#)
  - suppressing records in the OPAC, [8-30](#)
- OPAC Call Slip Messages dialog box, [5-99](#)
- OPAC Circ Desk field, [10-20](#)
- OPAC headings search, [3-22](#)
- OPAC Messages, [14-6](#)
- opac.ini file, [D-23](#)
- operator
  - self check, [C-2](#)
- Operator field, [11-3](#)
- Operator ID field, [1-2](#)
  - Patron Id tab, [4-12](#)
- Operator may Override list box, [9-3](#)
- options menu, [14-6](#)
- Order button, [11-15](#), [11-19](#)
- Order Quantity field, [11-14](#), [11-17](#), [11-24](#)
- Order Status section, [11-15](#)
- ordering
  - distributable items, [11-19](#)
- ordering automatically
  - item distribution, [11-25](#)
- Outstanding Demerits tab, [D-11](#), [D-34](#)
- outstanding fines
  - viewing, [5-34](#), [5-35](#)
- Outstanding Fines for this Item dialog box, [5-35](#), [5-36](#)
- Outstanding Fines/Fees tab, [4-87](#)
- Overdue, [5-20](#)
- Overdue item status, [5-20](#)
- overview
  - circulation, [2-1](#)
- Owning Library field, [5-6](#)

---

## P

- parent patron record
  - definition, [2-5](#)
- Password field, [1-2](#)

- patron
  - counters
    - editing, [4-138](#)
    - setting, [4-134](#), [4-138](#)
  - definition, [2-4](#)
  - hold request, [4-106](#)
  - proxy
    - adding, [4-148](#)
    - creating, [4-145](#), [4-148](#)
    - deleting, [4-153](#)
    - updating, [4-152](#)
  - purge, [4-18](#)
  - recall request, [4-106](#)
  - statistical categories, [4-140](#)
  - statistical information, [4-139](#)
- Patron Barcode field, [5-12](#), [5-31](#), [10-21](#)
  - Proxy Patron tab, [4-17](#), [4-147](#)
- patron block, [9-1](#)
  - overriding, [9-3](#)
- Patron Blocked dialog box, [D-14](#)
- [Patron Call Slips] stanza, [A-32](#)
- Patron Call Slips tab, [4-116](#)
- [Patron Charged Items] stanza, [A-25](#)
- Patron Fines button, [5-35](#)
- Patron Fines/Fees dialog box, [4-6](#), [4-86](#), [7-10](#), [D-11](#)
  - accessing, [4-91](#)
- patron group
  - definition, [2-4](#)
- Patron Group field, [4-25](#)
  - Patron Id tab, [4-12](#)
  - Proxy Patron tab, [4-17](#), [4-147](#)
- Patron ID field, [3-4](#)
- patron ID number
  - searching by, [3-6](#)
- Patron ID tab, [4-4](#)
- Patron Id tab, [4-11](#)
- [Patron Info Page] stanza, [D-23](#)
- Patron Information Screen, [C-21](#)
- patron maintenance button, [3-5](#)
- Patron menu
  - Copy Barcode, [4-54](#)
- patron menu, [14-15](#)
- Patron Name, [4-128](#)
- Patron Name field, [4-128](#), [5-31](#), [5-35](#), [5-88](#), [6-5](#), [10-17](#), [10-21](#)
  - Proxy Patron tab, [4-17](#), [4-147](#)
- patron note
  - adding, [4-130](#)
  - deleting, [4-132](#)
- Patron Record
  - copying barcodes, [4-54](#)

- patron record, [4-2](#)
  - adding, [4-29](#), [6-22](#)
    - multiple addresses, [4-54](#)
    - multiple barcodes, [4-54](#)
    - multiple phone numbers, [4-54](#)
  - Address/Phone tab, [4-14](#)
  - buttons, [4-4](#)
  - Counters tab, [4-15](#)
    - Claims Returned, [4-16](#)
    - Current Call Slips, [4-16](#)
    - Current Short Loans, [4-16](#)
    - Historical Call Slips, [4-16](#)
    - Historical Charges, [4-16](#)
    - Historical Distributions, [4-16](#)
    - Historical Short Loans, [4-16](#)
    - Holds Placed, [4-16](#)
    - Items Recalled, [4-16](#)
    - Lost Items, [4-16](#)
    - Recalls Placed, [4-16](#)
    - Reset Date, [4-16](#)
    - Reset Operator, [4-16](#)
    - Self-Shelved Items, [4-16](#)
    - Unclaimed Short Loans, [4-16](#)
  - creating, [4-19](#)
  - deleting, [4-66](#), [4-69](#)
  - deleting information, [4-62](#)
  - Details tab, [4-12](#)
  - editing, [4-41](#), [4-52](#)
  - e-mailing patrons, [4-155](#)
  - History tab, [4-17](#)
    - Expires, [4-18](#)
    - Purge, [4-18](#)
    - Registered, [4-18](#)
    - Suspended Until, [4-18](#)
    - Updated by/at, [4-18](#)
  - note, [4-126](#)
  - Patron Id tab, [4-11](#)
    - Barcode field, [4-12](#)
    - Institution Id field, [4-12](#)
    - Operator Id field, [4-12](#)
    - Patron Group field, [4-12](#)
    - social security number (SSN) field, [4-12](#)
    - Status/Date field, [4-12](#)
  - Proxy Patron tab, [4-16](#)
  - searching from the Charge work space, [3-8](#)
  - searching from the Patron work space, [3-2](#)
  - Set Patron Counters dialog box
    - Call Slips Placed (historical), [4-138](#)
    - Claims Returned, [4-136](#)
    - Item Distributions (historical), [4-138](#)
    - Items Borrowed (historical), [4-136](#)
    - Lost Items, [4-137](#)
    - Self-Shelves, [4-137](#)
    - Short Loans Placed (historical), [4-138](#)
  - tabs, [4-11](#)
  - Patron Record box, [4-19](#)
  - Patron Record dialog box, [4-155](#)
  - patron request
    - short loan, [4-106](#), [4-121](#)
  - patron request information, [4-106](#)
    - viewing, [6-24](#)
  - Patron Request Information button, [4-7](#)
  - Patron Request Information dialog box, [4-7](#), [4-106](#), [6-24](#)
  - [Patron Requests] stanza, [A-29](#)
  - Patron Search dialog box, [3-2](#), [3-5](#), [3-9](#), [6-7](#), [11-8](#)
  - Patron Statistical Categories dialog box, [4-11](#), [4-140](#), [4-142](#), [4-144](#)
  - patron statistical category
    - applying, [4-142](#)
    - removing, [4-143](#)
  - Patron submenu
    - Paste Barcode, [6-20](#)
  - patron suspension, [D-3](#), [D-26](#)
  - Patron Suspension dialog box, [D-39](#)
  - Patron Title field, [4-42](#)
  - Patron work space
    - searching for a patron record, [3-2](#)
  - payment
    - accept, [7-10](#)
  - pending requests list, [4-111](#)
  - percent sign (%), [3-18](#)
  - Perm. Location field, [5-9](#)
  - permanent address type, [4-14](#), [4-26](#), [4-55](#)
  - Permanent Location field, [5-87](#), [10-17](#)
  - Personal Identification Number (PIN), [4-70](#)
  - Phone field, [4-28](#), [4-52](#)
  - phone note, [4-127](#), [4-128](#)
  - Phone tab, [4-27](#), [4-51](#)
  - Phone Type field, [4-52](#)
  - photocopying
    - documentation, [xxii](#)
  - physical items, [8-3](#), [8-21](#)
  - Pick and Scan, [14-6](#)
  - Pickup At field, [5-82](#)
  - pickup location, [5-85](#)
  - Pickup Location field, [4-109](#), [4-117](#), [4-122](#), [4-123](#), [5-88](#), [10-17](#), [10-21](#)
  - piece labels, [B-1](#)
  - Pieces field, [5-9](#), [5-53](#), [5-60](#)
  - PIN
    - changing in Circulation module, [4-70](#)

---

PIN (Personal Identification Number), [4-70](#)  
Place field, [5-49](#), [5-50](#)  
Place Items on Active Course Reserve Lists On  
Reserve batch job, [8-70](#)  
place of publication search limit, [3-57](#), [3-60](#)  
Place Recalls and Holds for Items on Active Course  
Reserve Lists batch job, [8-70](#)  
Place Request button, [5-3](#), [5-79](#), [5-84](#)  
Place Request dialog box, [5-79](#), [5-84](#), [10-10](#)  
[Place] stanza, [3-65](#)  
Place/Date field, [5-6](#)  
placing  
call slip request, [5-83](#)  
hold request, [5-83](#)  
recall request, [5-83](#)  
remote storage request, [5-83](#)  
requests, [5-79](#)  
short loan request, [10-9](#)  
Plus button, [8-53](#)  
plus sign (+), [3-18](#)  
pop-up note, [4-128](#)  
Post Against Fine/Fee dialog box, [4-91](#), [4-99](#), [7-11](#),  
[D-34](#)  
Post Against option button, [7-12](#)  
POST request, [5-74](#)  
Post... button, [4-91](#)  
posting against  
demerits, [D-34](#)  
fine/fee, [4-91](#), [4-99](#)  
fine/fee from Charge/Renew window, [4-103](#)  
fine/fee from Discharge window, [4-103](#)  
fine/fee from Patron window, [4-102](#)  
Posting field, [4-88](#), [D-13](#)  
Posting Type field, [4-101](#), [7-12](#)  
Posting Type list, [D-35](#)  
Price field, [5-9](#), [5-53](#), [5-60](#)  
Print button, [11-4](#)  
Print dialog box, [B-17](#)  
[Print Options] stanza, [B-3](#)  
[Print Template Label] stanza, [B-4](#)  
[Print Template Piece] stanza, [B-4](#)  
printer settings  
changing, [B-17](#)  
printing  
call slip, [4-120](#)  
charged items  
Charged Items Index dialog box, [4-79](#)  
Charged Items Index dialog box, [4-76](#), [4-89](#)  
discharge slip, [7-6](#)  
distributable item list, [11-30](#)  
hold slip, [7-6](#)

label  
alternate font, [B-7](#)  
label field information, [B-7](#)  
labels, [B-1](#)  
bibliographic record information, [B-1](#)  
item record information, [B-2](#)  
lables  
holdings record information, [B-2](#)  
patron fine/fee statement, [4-104](#)  
requests, [4-115](#)  
reserve pick list, [8-69](#)  
routing slip, [7-6](#)  
short loan, [4-125](#)  
short loan request, [10-23](#)  
spine and piece labels, [B-16](#)  
Process Course Reserve check box, [8-2](#)  
Prompt Fines/Print Discharge Slips, [7-19](#)  
prompt if fine or fee, [7-10](#)  
Protect check box, [4-50](#)  
Proxies for field  
Proxy Patron tab, [4-17](#), [4-147](#)  
Proxy field, [6-5](#), [6-16](#)  
Proxy patron  
A proxy patron is a patron who are authorized to  
charge items for another patron., [4-145](#)  
proxy patron  
adding, [4-148](#)  
charging, [6-14](#)  
creating, [4-145](#), [4-148](#)  
deleting, [4-153](#)  
updating, [4-152](#)  
Proxy Patron button, [6-5](#)  
Proxy Patron field, [5-12](#)  
Proxy Patron Maintenance dialog box, [4-147](#), [4-149](#)  
Proxy Patrons button, [6-15](#)  
Proxy Patrons tab, [4-4](#), [4-16](#)  
Pub. No field, [5-6](#)  
publication status search limit, [3-57](#), [3-60](#)  
Publisher field, [5-6](#), [5-50](#)  
Publishers identification Number field, [5-50](#)  
Purge (patron record), [4-18](#)  
Purge Date field, [4-14](#), [4-24](#), [4-45](#)  
purpose  
of this document, [xix](#)

---

## Q

Quantity field, [11-19](#)

Quantity Received field, [11-22](#)  
question mark (?), [3-18](#)  
quick sort, [3-34](#)

---

## R

### radio button

- Boolean, [3-17](#)
- Browse, [3-22](#)
- Course Name, [8-13](#)
- Course Number, [8-13](#)
- Dept. Code, [8-13](#)
- Dept. Name, [8-13](#)
- Find, [3-21](#)
- Free Text, [3-17](#)
- Holdings Boolean, [3-17](#)
- Instructor, [8-13](#)
- Item Barcode, [8-13](#)
- List Dates, [8-13](#)
- List Name, [8-13](#)
- Request Type, [5-81](#)
- Section Number, [8-14](#)
- Title or Copy Level, [5-81](#)

Rank field, [4-109](#), [5-88](#)

### ranking

- item status, [5-20](#)

Recall Demerits field, [D-8](#), [D-21](#)

### recall request

- canceling, [4-111](#), [5-89](#)
- charging, [4-112](#)
- description, [5-77](#)
- editing, [4-113](#), [5-92](#)
- patron, [4-106](#)
- placing, [5-83](#)
- resequencing, [5-96](#)

Recall Request items status, [5-21](#)

Recalled field, [5-12](#), [5-31](#)

Recalls Placed counter, [4-16](#)

### Recalls Placed field

- Item History tab, [5-10](#)

Receipt button, [6-6](#)

Receive button, [11-15](#)

received serial issue field code, [B-10](#)

### receiving

- orders of distributable items, [11-20](#)

### record

- holdings

- viewing, [5-75](#)

- item, [5-1](#)

- adding, [5-55](#)

- deleting, [5-66](#)

- editing, [5-65](#)

- linking to existing holdings, [5-61](#)

- resequencing, [5-67](#)

- viewing, [5-2](#)

Ref/Note additional references, [3-43](#)

Reference additional references, [3-40](#), [3-42](#)

Reference Information dialog box, [3-42](#), [3-43](#)

Refresh button, [10-21](#)

refund processing for returned lost items, [7-15](#)

Registered (patron record), [4-18](#)

### reissue

- reason for, [xix](#)

### Relevance column

- Titles Index, [3-33](#)

### remote storage request

- description, [5-78](#)

- placing, [5-83](#)

Remote Storage Request item status, [5-21](#)

### removing

- e-items from reserve list, [8-51](#)

- item statistical category, [5-18](#)

- item status from item record, [5-25](#)

- items status when discharging, [7-13](#)

- patron statistical category, [4-143](#)

- physical items from reserve list, [8-33](#)

Renew button, [4-76](#), [6-14](#)

Renewal Date field, [5-12](#)

Renewal Due Date field, [5-12](#)

Renewed field, [5-31](#)

Renewed item status, [5-20](#)

### renewing

- items, [6-11](#)

- Charged Items Index dialog box, [4-85](#)

- items from the Charged Items Index dialog box, [6-12](#)

Reorder Point field, [11-14](#), [11-24](#)

reproduction, of documentation, [xxii](#)

### request

- call slip, [4-106](#), [4-115](#)

- cancel, [5-86](#)

- circulation, [5-77](#)

- edit, [5-86](#)

- pickup location, [5-85](#)

- placing, [5-79](#)

- printing, [4-115](#)

- resequence, [5-86](#)

Request Information button, [4-3](#), [6-6](#)

Request Maintenance (for Short Loans) dialog box,

---

10-16  
Request Maintenance button, 5-3, 5-86, 5-90, 5-93, 5-97  
Request Maintenance dialog box, 5-86, 5-90, 5-93, 5-97  
Request Type radio button, 5-81  
Requested field, 4-116  
requests  
    blocked, 5-83  
    maintaining, 5-86  
Resequence Items dialog box, 5-68, 5-69  
Resequence Recall/Hold Request Queues check box, 5-86  
resequencing  
    item record, 5-67  
    requests, 5-86  
Reserve button, 8-14  
Reserve Charges field, 5-10  
Reserve Item Type field, 8-8  
    Create New Reserve List dialog box, 8-10  
reserve list  
    adding additional copies of items, 8-30  
    adding items, 8-21  
    adding items by barcode, 8-23  
Reserve List Header section, 8-3, 8-4  
Reserve List History dialog box, 8-68  
Reserve List Search dialog box, 8-9, 8-12, 8-20  
reserve lists, 8-20  
Reserve Location field, 8-8  
    Create New Reserve List dialog box, 8-10  
reserve menu, 14-12  
[Reserve Pick List] stanza, A-37  
Reserve window  
    E-Items tab, 8-3  
    Linked Courses section, 8-3  
    Reserve List Header section, 8-3  
Reserve work space, 8-3, 8-37  
    Items tab, 8-5  
    Linked Courses section, 8-7  
    Reserve List Header section, 8-4  
reserving  
    items, 8-36  
Reset Date (counters), 4-16  
Reset Operator (counters), 4-16  
Reset Patron Record Counters check box, 4-134  
ResetTime key, C-21  
resetting  
    patron counters, 4-138  
re-sort, 3-33  
re-sort configuration, 3-35  
results

    headings search, 3-42  
    holdings boolean search, 3-37, 3-39  
    keyword search, 3-31, 3-33  
    left-anchored search, 3-33  
Retain Last Search, 3-56  
retain patron ID, 11-29  
Retain Patron Id for Circ History check box, 5-30  
Retain search limits between searches check box, 3-69  
retaining  
    search limits between searches, 3-58  
Retrieve Holdings dialog box, 3-88  
routing slip  
    printing, 7-6  
[Routing Slip] stanza, A-15  
rules  
    address types, 4-55

---

## S

Save Settings button, 3-30  
Scheduled item status, 5-20  
scope note, 3-44  
screen  
    Fine/Fee Reasons, D-9  
    Miscellaneous, D-4  
search  
    holdings boolean results, 3-37  
    keyword results, 3-31  
    OPAC headings, 3-22  
    staff headings, 3-22  
Search By field, 3-3, 11-3  
Search by Item Barcode dialog box, 3-11, 5-33  
Search dialog box, 3-11, 3-15, 3-27, 6-7  
    Builder tab, 3-27  
    Index Selection tab, 3-20  
    Keyword tab, 3-16  
Search field, 8-14, 10-21  
Search for, 3-28  
Search For field, 3-18, 3-23, 11-3  
Search In, 3-29  
search limit  
    date, 3-57, 3-60  
    language, 3-57, 3-60  
    Limit Type column, 3-58  
    list of limits, 3-58  
    location, 3-57, 3-60  
    medium, 3-57, 3-60

- place of publication, [3-57](#), [3-60](#)
- publication status, [3-57](#), [3-60](#)
- setting, [3-67](#)
- type, [3-57](#), [3-60](#)
- Value, [3-58](#)
- search limits
  - stanza, [3-60](#)
- Search Limits dialog box, [3-50](#), [3-54](#), [3-55](#), [3-57](#), [3-67](#)
- search preferences
  - setting, [3-56](#)
- search results
  - headings, [3-42](#)
  - holdings boolean, [3-39](#)
  - keyword, [3-33](#)
  - left-anchored, [3-33](#)
- search type drop-down field, [3-22](#)
- searching
  - accessing search history, [3-54](#)
  - authorities, [3-20](#)
  - automatic truncation, [3-56](#)
  - builder, [3-27](#), [3-52](#)
  - Circulation examples, [3-74](#)
  - command, [3-19](#)
  - command line, [3-19](#)
  - course reserve
    - results, [8-15](#)
  - course reserve list, [8-12](#)
    - by course name, [8-12](#), [8-20](#)
    - by course number, [8-12](#), [8-20](#)
    - by department code, [8-12](#), [8-20](#)
    - by department name, [8-12](#), [8-20](#)
    - by instructor, [8-12](#), [8-20](#)
    - by list dates, [8-12](#), [8-20](#)
    - by list name, [8-12](#), [8-20](#)
    - by section number, [8-12](#), [8-20](#)
  - course reserve list by item, [8-18](#)
  - defaults, [3-56](#)
  - distributable items, [11-4](#)
  - for a list
    - from reserve list, [8-20](#)
  - for a patron record from the Charge work space, [3-8](#)
  - for a patron record from the Patron work space, [3-2](#)
  - for an item by barcode, [3-11](#)
  - for item keyword search, [3-47](#)
  - from the item menu, [3-86](#)
  - headings searches by call number, [3-26](#)
  - headings/index selection, [3-20](#), [3-49](#)
  - headings/non-keyword, [3-80](#)
  - history tab, [3-31](#)
  - journal index, [3-29](#)
  - item not found, [3-12](#)
  - keyword, [3-16](#), [3-47](#)
  - left-anchored, [3-49](#), [3-80](#), [3-82](#)
  - limits, [3-31](#), [3-57](#)
  - list of short loan items, [10-22](#)
  - MFHD keyword index, [3-29](#)
  - multiple items found, [3-13](#), [3-87](#)
  - multiple patrons found, [3-7](#), [3-9](#)
  - patron not found, [3-7](#), [3-9](#)
  - patron record, [3-2](#)
    - by barcode, [3-3](#)
    - by institution ID, [3-3](#)
    - by name, [3-3](#)
    - by social security number (SSN), [3-3](#)
  - reserve list, [8-12](#)
    - from an open list, [8-18](#)
  - result options, [3-7](#), [3-9](#), [3-12](#)
  - retain last search, [3-56](#)
  - single item found, [3-13](#)
  - single patron found, [3-7](#), [3-9](#)
  - unable to limit, [3-57](#)
  - URI option, [3-19](#), [3-24](#), [3-30](#), [3-55](#)
  - with relevance, [3-17](#)
  - without relevance, [3-17](#)
- searching by
  - barcode, [3-6](#)
  - institution id number, [3-6](#)
  - name, [3-6](#)
  - patron ID number, [3-6](#)
  - social security number, [3-6](#)
- [SearchURI] stanza, [3-56](#)
- secondary search, [3-77](#)
- section
  - Course, [8-52](#), [8-55](#)
  - Created, [11-14](#)
  - Date and Time, [10-21](#)
  - Department, [8-52](#), [8-53](#)
  - Instructor, [8-52](#), [8-54](#)
  - Last Updated, [11-14](#)
  - Order Status, [11-15](#)
  - Section, [8-52](#), [8-56](#)
- Section field, [8-7](#)
- Section No. field, [8-57](#)
- Section Number radio button, [8-14](#)
- Section section, [8-52](#), [8-56](#)
- security
  - accept payments, [4-99](#), [7-10](#)
  - add/update fines/fees, [4-92](#)
  - add/update hold recall requests, [4-108](#)

---

- add/update item records, [5-55](#)
- add/update patron records, [4-20](#), [4-41](#), [4-140](#)
- add/update patron records- patron notes, [4-127](#)
- add/update proxy patron, [4-146](#)
- add/update recall/hold requests, [5-79](#), [6-3](#)
- attach holdings to any bibliographic record, [5-37](#)
- backdating due date, [7-7](#)
- change due date, [6-18](#)
- charge/renew, [4-74](#)
- create items on-the-fly, [5-37](#)
- delete item records, [5-55](#)
- delete patron records, [4-63](#)
- discharge, [4-74](#)
- discharging, [7-2](#)
- distribute items, [11-2](#)
- overriding blocks, [9-3](#)
- process course reserve, [8-2](#)
- resequence hold recall request queues, [4-108](#)
- resequence recall/hold request queues, [5-86](#)
- reset patron counters, [4-134](#)
- unable to view identifying information, [5-32](#)
- update PINs, [4-71](#)
- [Security] stanza, [C-1](#), [C-6](#), [C-9](#)
- see also, [3-45](#)
- Select Current Location dialog box, [1-3](#)
- Select one or more authority records dialog box, [3-46](#)
- selecting
  - location, [1-3](#)
  - patron when multiple patrons match search criteria, [3-10](#)
- selecting options
  - keyboard equivalents, [14-2](#)
- self check
  - adding location to circ policy definition, [C-4](#)
  - charging, [C-21](#)
  - creating a location, [C-3](#)
  - creating an operator, [C-2](#)
  - exiting, [C-22](#)
  - magnetic media, [5-9](#)
  - Patron Information Screen, [C-21](#)
  - ResetTime key, [C-21](#)
  - sample circSC.ini file, [C-16](#)
  - sensitize, [5-9](#)
  - setting up, [C-1](#)
  - system administration settings, [C-2](#)
- Self-Shelved Items counter, [4-16](#)
- Self-Shelves counter, [4-137](#)
- Send Record To button, [5-74](#), [5-75](#)
- sending MARC record to a web server, [5-74](#)
- sensitize self check flag, [5-9](#)
- Series field, [5-6](#), [5-50](#)

- session preferences, [13-1](#)
- Session Preferences dialog box, [3-56](#)
- Set Patron Counters dialog box, [4-10](#), [4-135](#)
- Set short loan advance booking days displayed field, [10-7](#)
- Set/Change Item Status check box, [7-13](#), [7-15](#)
- setting
  - demerit rate, [D-20](#)
  - patron counters, [4-134](#), [4-138](#)
  - search limits, [3-67](#)
  - search preferences, [3-56](#)
- setting up
  - circulation policy, [10-6](#)
  - demerits parameters, [D-18](#), [D-19](#)
  - self check, [C-1](#)
- shortcuts
  - keyboard, [14-2](#)
- short loan, [10-1](#)
  - archive short loans batch job, [10-8](#)
  - canceling, [4-124](#), [10-18](#), [10-23](#)
  - charge before early pickup time, [10-25](#)
  - charging, [4-126](#), [10-24](#)
  - circulation policy, [10-5](#)
  - configuring, [10-1](#)
  - desk calendar, [10-5](#)
  - determining loan period when charging, [10-24](#)
  - implementing, [10-3](#)
  - item type, [10-4](#)
  - location, [10-3](#), [10-4](#)
  - maintaining, [10-16](#)
  - making an item short loanable, [10-5](#)
  - no request made before charge, [10-25](#)
  - normal charge, [10-24](#)
  - patron request, [4-106](#), [4-121](#)
  - placing a short loan request, [10-9](#)
  - print location, [10-4](#)
  - printing, [4-125](#), [10-23](#)
  - request form, [10-8](#)
  - search list, [10-19](#)
  - searching for a list of short loan items, [10-22](#)
  - setting up
    - system administration settings, [10-7](#)
  - setting up short loan circulation policy, [10-6](#)
  - submitting a request, [10-9](#)
  - times buffer, [10-25](#)
  - unclaimed interval, [10-21](#)
  - unclaimed status, [10-21](#)
  - view list of short loan items, [10-22](#)
  - viewing, [10-19](#)
- Short Loan button, [10-22](#)
- Short Loan Charges field, [5-10](#)



- Short Loan check box, [10-2](#)
- Short Loan Date/Time dialog box, [10-12](#)
- [Short Loan Info] stanza, [A-42](#)
- Short Loan Matrix tab, [10-2](#)
- short loan request
  - description, [5-79](#)
- Short Loan Request information button, [6-6](#)
- Short Loan Request items status, [5-21](#)
- Short Loan Search List dialog box, [10-22](#)
- [Short Loan Search] stanza, [A-45](#)
- Short Loan Status field, [10-21](#)
- Short Loans Placed (historical) counter, [4-138](#)
- Short Loans tab, [4-121](#)
  - accessing, [4-124](#)
- single client login, [1-5](#)
- SMS, [4-13](#), [12-1](#)
- SMS Number field, [4-23](#), [4-44](#)
- social security number
  - masking, [3-4](#)
  - searching by, [3-6](#)
- social security number (SSN)
  - masking, [4-4](#), [4-12](#), [4-22](#), [4-43](#)
- social security number (SSN) field, [3-4](#), [4-4](#), [4-22](#), [4-43](#)
  - Patron Id tab, [4-12](#)
- sort by, [3-34](#)
- sorting columns in the discharge window, [7-4](#)
- Source button, [11-19](#)
- SPAC, [3-72](#)
- Spine field, [5-53](#), [5-60](#)
- Spine Label field, [5-9](#)
- spine label field code
  - bibliographic field code, [B-9](#)
  - generic field code, [B-8](#)
  - holdings field code, [B-9](#)
  - item field code, [B-9](#)
  - library address field code, [B-10](#)
  - received serial issue field code, [B-10](#)
- spine label print template, [B-2](#)
- spine labels, [B-1](#)
- spinelabel.cfg file, [B-1](#)
- Sponsor Name field, [4-147](#)
- Sponsor patron
  - A sponsor patron is the patron for whom the proxy patron can charge items., [4-148](#)
- staff headings search, [3-22](#)
- stanza
  - [Book], [5-41](#), [5-47](#)
  - [Circulation], [1-7](#)
  - [Circulation History], [A-34](#)
  - [Date], [3-62](#)
  - [Discharge Slip], [A-9](#), [A-11](#)
  - [Due Date Slip], [A-4](#), [A-7](#), [C-14](#)
  - [Due Date Slip-patron group], [A-7](#)
  - [Fine/Fee Payment Receipt], [A-18](#)
  - [Fine/Fees Statement], [A-21](#)
  - [General], [C-6](#)
  - [Hold Slip], [A-11](#)
  - [Item Distribution], [A-49](#)
  - [Language], [3-61](#), [C-10](#)
  - [Limits], [3-60](#)
  - [MARC Record], [A-39](#)
  - [Medium], [3-63](#)
  - [Patron Call Slips], [A-32](#)
  - [Patron Charged Items], [A-25](#)
  - [Patron Info Page], [D-23](#)
  - [Patron Requests], [A-29](#)
  - [Place], [3-65](#)
  - [Print Options], [B-3](#)
  - [Print Template Label], [B-4](#)
  - [Print Template Piece], [B-4](#)
  - [Reserve Pick List], [A-37](#)
  - [Routing Slip], [A-15](#)
  - search limits, [3-60](#)
  - [SearchURI], [3-56](#)
  - [Security], [C-1](#), [C-6](#), [C-9](#)
  - [Short Loan Info], [A-42](#)
  - [Short Loan Search], [A-45](#)
  - [Status], [3-66](#)
  - [Templates], [5-41](#), [5-45](#), [B-3](#)
  - [Type], [3-64](#)
  - Voyager.ini [Global Log], [3-35](#)
- Start Time field, [4-123](#), [10-17](#), [10-21](#)
- State/Province field, [4-27](#), [4-50](#)
- statistical categories, [4-140](#)
  - applying, [4-142](#)
  - item, [5-15](#)
  - removing, [4-143](#), [5-18](#)
- Statistical Category field, [4-141](#), [5-15](#), [5-22](#)
- Statistical Category List field, [4-142](#)
- statistical information, [4-139](#)
- Statistics button, [4-4](#), [4-11](#), [4-140](#), [5-4](#)
- status
  - item, [5-19](#)
  - lost, [4-137](#)
- status (publication) search limit, [3-57](#), [3-60](#)
- Status button, [5-4](#)
- Status Date field, [5-88](#), [10-17](#)
- Status field, [4-47](#), [4-76](#), [5-88](#), [6-7](#), [10-17](#)
- [Status] stanza, [3-66](#)
- Status/Date field, [4-117](#)
  - Patron Id tab, [4-12](#)

---

- Stop button, [3-32](#), [3-38](#), [3-41](#)
- submitting short loan request, [10-9](#)
- Supervisor button, [9-16](#), [9-21](#)
- suppress from OPAC, [8-30](#)
- Suspend Patron dialog box, [D-39](#)
- Suspended Until
  - History tab, [4-18](#)
- suspending patron record manually, [D-38](#)
- suspension, [D-3](#)
  - editing end dates, [D-40](#)
- Suspension Days field, [D-5](#), [D-6](#), [D-20](#)
- Suspension End Date field, [D-39](#)
- System No. field, [5-6](#)

---

## T

### tab

- Address/Phone, [4-4](#), [4-14](#)
- Barcode, [4-24](#), [4-25](#)
- Bib, [5-39](#), [5-47](#)
- Bib Brief, [5-4](#), [5-5](#)
- Builder, [3-27](#), [3-52](#)
- Counters, [4-4](#), [4-15](#)
- Demerits History, [D-11](#)
- Details, [4-12](#), [4-22](#), [4-23](#), [4-43](#), [4-44](#)
- E-Items, [8-3](#), [8-39](#)
- E-items, [8-5](#)
- Fine/Fee Reason, [D-10](#)
- Fines/Fees History, [4-87](#)
- History, [3-31](#), [3-54](#), [4-4](#)
  - patron record, [4-17](#)
- Holdings, [5-39](#), [5-50](#)
  - item record, [5-4](#), [5-6](#)
- Holdings/Item, [5-62](#)
- Holds and Recalls, [4-108](#)
- Index Selection, [3-21](#)
- index selection, [3-49](#)
- Item, [5-51](#)
  - Add Item dialog box, [5-63](#)
- Item Details, [5-4](#), [5-8](#)
- Item History, [5-4](#), [5-9](#)
- Item/Holdings, [5-4](#), [5-7](#)
- Items, [5-39](#), [8-3](#), [8-23](#)
- Keyword, [3-16](#), [3-47](#)
- Name, [4-20](#), [4-21](#), [4-41](#), [4-42](#)
- Outstanding Demerits, [D-11](#), [D-34](#)
- Outstanding Fines/Fees, [4-87](#)
- Patron Call Slips, [4-116](#)
- Patron ID, [4-4](#)
- Patron Id, [4-11](#)
- patron record, [4-11](#)
- Phone, [4-27](#), [4-51](#)
- Proxy Patron, [4-16](#)
- Proxy Patrons, [4-4](#)
- Short Loan Matrix, [10-2](#)
- Short Loans, [4-121](#)
- Take Items on Inactive Course Reserve lists Off
  - Reserve batch job, [8-70](#)
- Temp. Item Type field, [5-9](#)
- Temp. Location field, [5-9](#)
- template
  - piece label, [B-2](#)
  - spine label, [B-2](#)
- Template field
  - Add Bib/Item dialog box, [5-55](#)
  - Create E-item and Attach New Bib and Holdings Record, [8-42](#)
- [Templates] stanza, [5-41](#), [5-45](#), [B-3](#)
- temporary address type, [4-14](#), [4-55](#)
- Temporary Location field, [5-52](#), [5-59](#), [5-87](#), [10-17](#)
- terms
  - circulation, [2-4](#)
- Time field
  - Backdate Discharge Time To..., [7-8](#)
  - Modify Due Date, [4-84](#), [6-19](#)
- time-out
  - charge, [6-8](#), [6-10](#), [6-18](#)
- times buffer
  - short loan, [10-25](#)
- Title field, [4-75](#), [4-88](#), [4-109](#), [4-116](#), [4-122](#), [4-123](#), [5-2](#), [5-31](#), [5-35](#), [5-50](#), [5-55](#), [5-57](#), [5-58](#), [5-59](#), [5-68](#), [5-81](#), [5-87](#), [6-6](#), [8-6](#), [8-55](#), [10-21](#), [11-3](#), [D-13](#)
- Title or Copy Level radio button, [5-81](#)
- Titles Index, [3-87](#)
  - Relevance column, [3-33](#)
  - sort by, [3-34](#)
- Titles Index dialog box, [3-31](#), [3-32](#), [3-48](#), [3-51](#), [3-54](#), [3-74](#), [3-75](#), [3-77](#), [3-80](#), [3-81](#), [3-83](#), [3-85](#)
- To field, [10-21](#)
- Total Distributed field, [11-13](#)
- Total Distributed field, [11-28](#)
- Total Due field, [4-88](#), [D-13](#)
- Total field, [4-75](#)
- Total fines displayed field, [4-88](#), [D-13](#)
- Total Selected field, [4-88](#)
- Total Students field, [8-57](#)
- tracking
  - exceptions
    - In-Transit items, [7-23](#)

In-Transit items, [7-20](#), [7-23](#)  
truncation  
    searching, [3-56](#)  
Type field, [4-49](#), [4-109](#), [5-88](#)  
type search limit, [3-57](#), [3-60](#)  
[Type] stanza, [3-64](#)

---

## U

Unclaimed Short Loans counter, [4-16](#)  
unclaimed status  
    short loan, [10-21](#)  
Unicode character set, [3-33](#), [3-39](#), [3-42](#)  
Uniform Resource Identifier (URI), [3-19](#), [3-24](#), [3-30](#),  
    [3-55](#)  
unreserving  
    items, [8-38](#)  
Update PINs check box, [4-71](#)  
Updated by/at (patron record), [4-18](#)  
Updated by/at field, [8-68](#)  
Updated/by/at field, [5-11](#), [10-18](#)  
updating  
    inventory information  
        item distribution, [11-23](#)  
    proxy patrons, [4-152](#)  
uploading  
    offline capture file, [6-30](#)  
URI search option, [3-19](#), [3-24](#), [3-30](#), [3-55](#), [3-56](#)  
Use Demerits check box, [D-5](#)  
Use Demerits field, [D-4](#)  
user-defined alternate search button, [3-55](#)

---

## V

Vendor Search dialog box, [11-17](#)  
View Circulation History dialog box, [5-31](#)  
viewing  
    charged item information, [6-21](#)  
    course reserve history, [8-67](#)  
    distributable items, [11-4](#)  
    item information  
        Charged Items Index dialog box, [4-76](#)  
    item record, [5-2](#)  
    item's circulation history, [5-33](#)  
    item's outstanding fines, [5-34](#), [5-35](#)

items distributed, [11-27](#)  
items distributed to specific patron, [11-28](#)  
list of short loan items, [10-22](#)  
login information, [1-5](#)  
MARC bibliographic record, [5-71](#)  
MARC holdings record, [5-75](#)  
MARC record, [3-51](#)  
patron request information, [6-24](#)  
short loan, [10-19](#)  
Voyager.ini  
    [Global Log] stanza, [3-35](#)  
voyager.ini file, [1-7](#), [5-74](#)  
    URI search option, [3-56](#)

---

## W

warning messages, [4-39](#)  
WebVoyage  
    circulation desk, [10-20](#)  
wildcard characters, [3-18](#)  
Withdrawn item status, [5-22](#)  
work space  
    Charge, [1-6](#), [3-8](#), [4-77](#), [4-96](#), [4-157](#), [6-1](#), [6-4](#), [6-9](#)  
    Circulation, [2-5](#)  
    Discharge, [7-2](#)  
    Item Distribution, [11-2](#)  
    Reserve, [8-3](#), [8-37](#)  
workspace  
    Charge <Offline Mode>, [6-29](#)

---

## Y

Year field, [4-117](#), [5-8](#), [5-51](#), [5-58](#)

---

## Z

Zip/Postal field, [4-27](#), [4-50](#)

