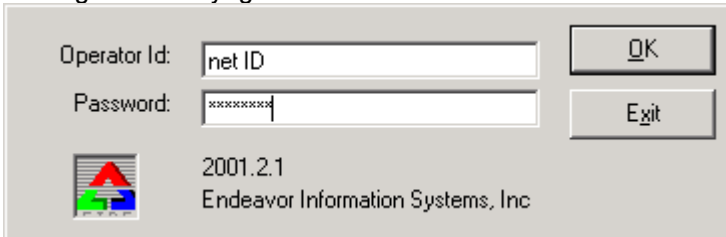



A: Preparation & Checking for Existing Lists

1. Sign on to Voyager Circulation Module.

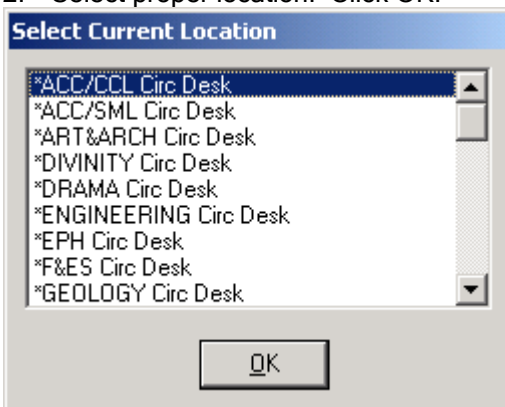


Operator Id:

Password:

 2001.2.1
Endeavor Information Systems, Inc

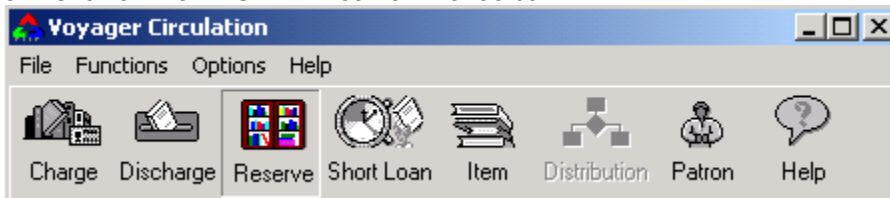
2. Select proper location. Click OK.



Select Current Location

- *ACC/CCL Circ Desk
- *ACC/SML Circ Desk
- *ART&ARCH Circ Desk
- *DIVINITY Circ Desk
- *DRAMA Circ Desk
- *ENGINEERING Circ Desk
- *EPH Circ Desk
- *F&ES Circ Desk
- *GEOLOGY Circ Desk

3. Click on the RESERVE icon on the toolbar.

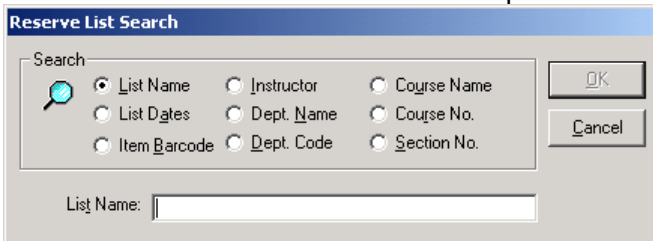


Voyager Circulation

File Functions Options Help

Charge Discharge **Reserve** Short Loan Item Distribution Patron Help

4. The Reserve List Search window will open.



Reserve List Search

Search

List Name Instructor Course Name

List Dates Dept. Name Course No.

Item Barcode Dept. Code Section No.

List Name:



IMPORTANT: You must check to see if a list already exists for the course you are working on! This is a three-step process: First, check by LIST NAME & CURRENT TERM. Next, check by LIST NAME & LAST YEAR/TERM. Lastly, check by INSTRUCTOR.

5. To check by LIST NAME & CURRENT TERM:

Click button next to List Name, enter your library abbreviation and current term, then click OK.

Reserve List Search

Search

List Name Instructor Course Name
 List Dates Dept. Name Course No.
 Item Barcode Dept. Code Section No.

List Name:

OK Cancel

Another window will open, showing all lists for the term alphabetically by dept/course #. Scroll through to see if there is one that corresponds to the list you are working on.

Example: Looking for Political Science (P S) 270A. There is no existing list.

Multiple Reserve Lists Found, Please Select One...

List Title	Effective	Expires
CCL F03 HIS 638A MERRIMAN, J.	9/3/2003	12/20/2003
CCL F03 P S 245A HORAN, C.	9/3/2003	12/20/2003
CCL F03 P S 302A WOKLER, R.	9/3/2003	12/20/2003
CCL F03 P S 317A/306A BENHABIB, S.	9/3/2003	12/20/2003
CCL F03 P S 349A ALBATS, Y.	9/3/2003	12/20/2003
CCL F03 P S 353A GRZYMALA-BUSSE, A	9/3/2003	12/20/2003
CCL F03 P S 403A GRZYMALA-BUSSE, A.	9/3/2003	12/20/2003
CCL F03 PATH 100A MADRI, J. A.	9/3/2003	12/20/2003
CCL F03 PHIL 658A RORTY, A.	9/3/2003	12/20/2003

OK Cancel

6. To check by LIST NAME & LAST YEAR/TERM:

Click button next to List Name, enter library abbreviation and last year/term, then click OK.

Reserve List Search

Search

List Name Instructor Course Name
 List Dates Dept. Name Course No.
 Item Barcode Dept. Code Section No.

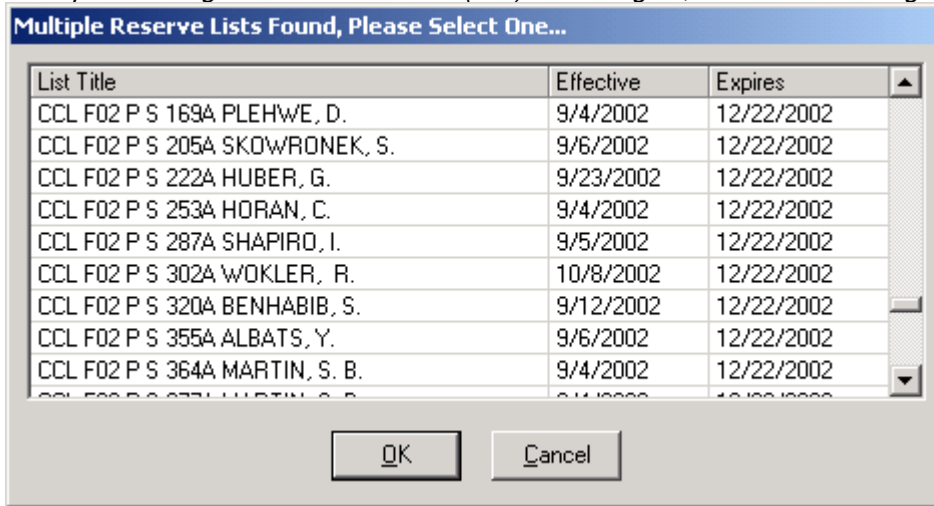
List Name:

OK Cancel

Again, another window will open, showing all lists for the term alphabetically by dept/course #. Scroll through to see if there is one that corresponds to the list you are working on.

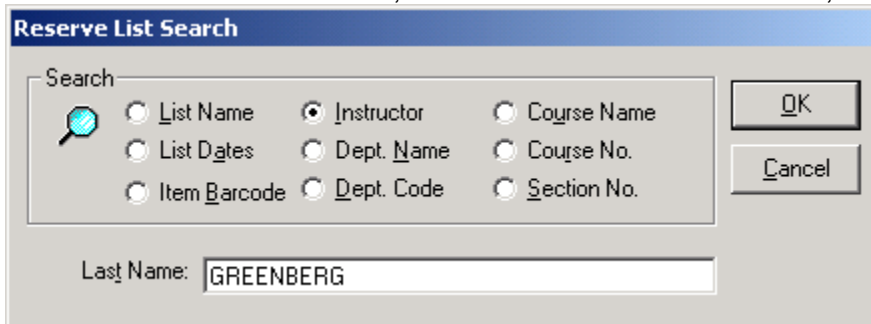
(see next page)

Example: Looking for Political Science (P S) 270A. Again, there is no existing list.

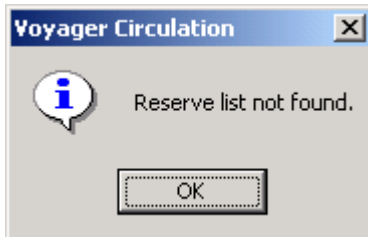


7. To check by INSTRUCTOR:

Click the button next to Instructor, enter the last name of the instructor, then click OK.



If no list exists for that instructor, this window will display:



You have now completed the three-step process.



After confirming that there is no existing list, proceed to **Section B: Creating New Lists**.

If an existing list is found, proceed to **Section C: Copying Items From Another List**.

B: Creating New Lists

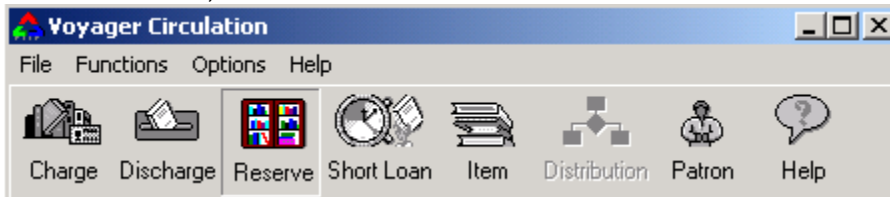


Before beginning this section, you **MUST** confirm that there is no existing list in Voyager.

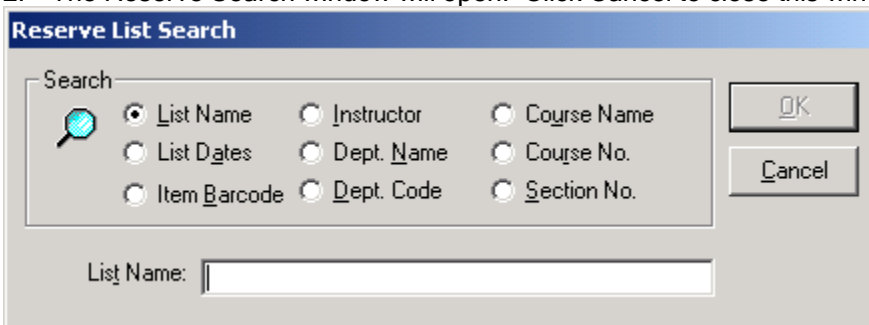
For instructions, see **Section A: Preparation & Checking for Existing Lists**.

If an existing list is found, proceed to **Section C: Copying Items From Another List**.

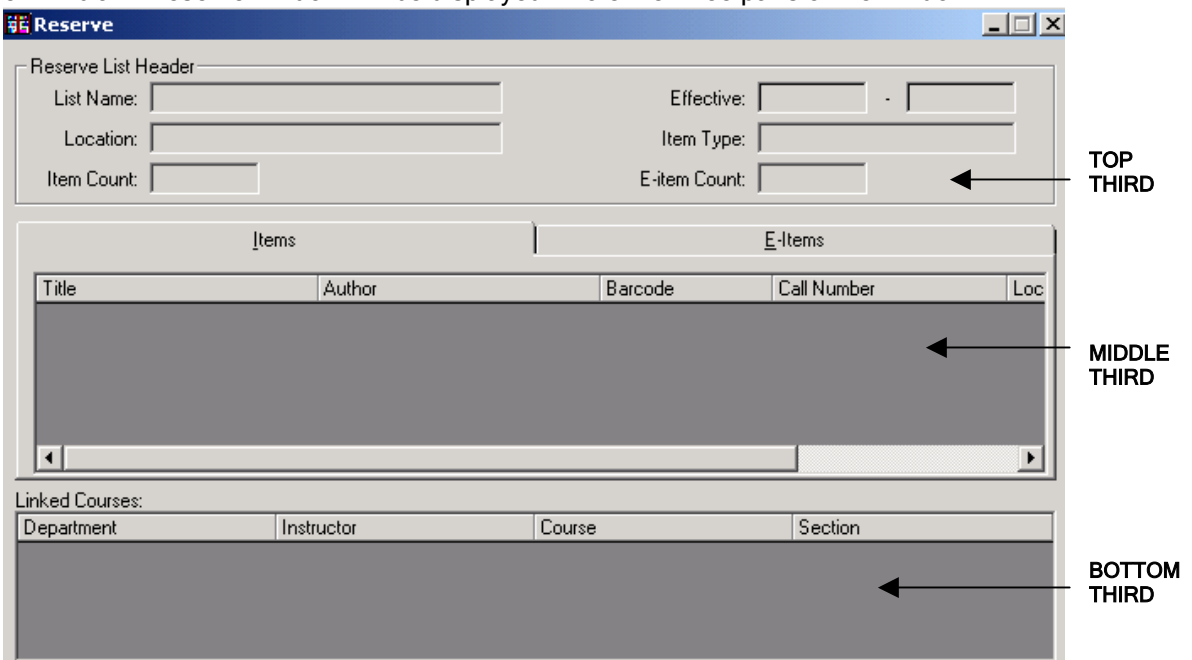
1. In Circulation, click on the RESERVE icon on the toolbar.



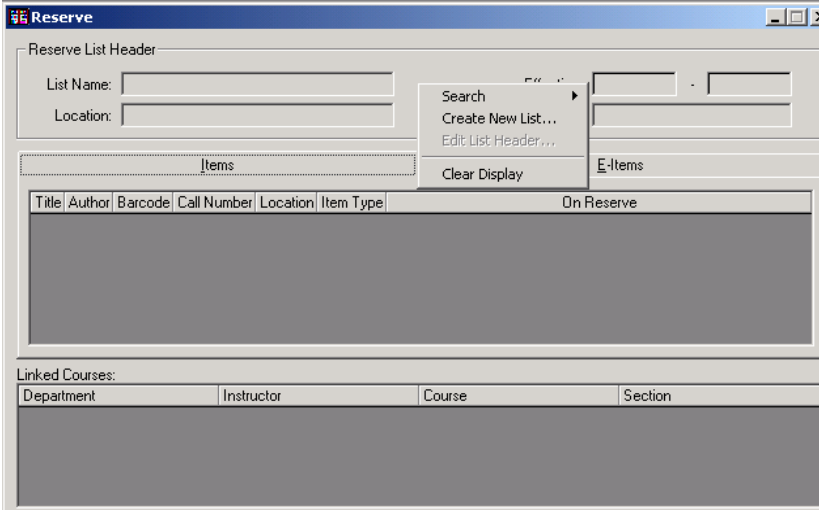
2. The Reserve Search window will open. Click Cancel to close this window.



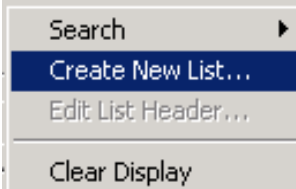
3. A blank Reserve window will be displayed. Note the three parts of the window.



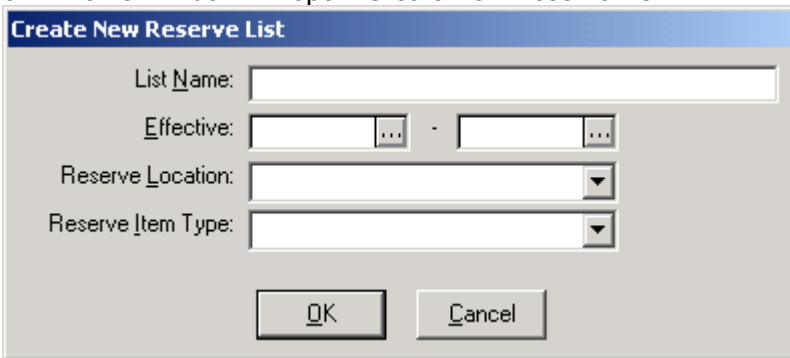
4. Place arrow in the **TOP THIRD** of the window. Right click mouse to display menu.



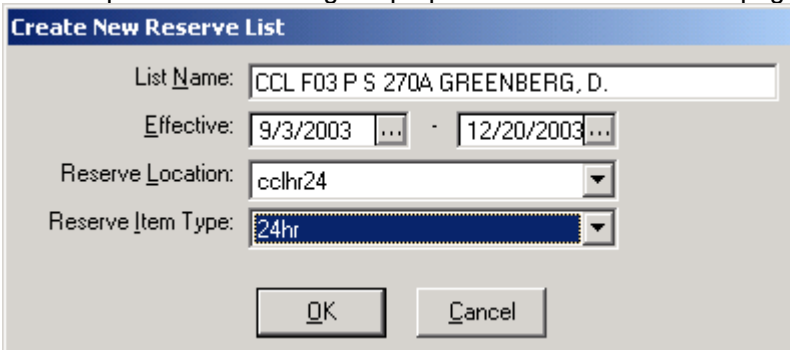
5. Select the second option on the menu: Create New List.



6. Another window will open: Create New Reserve List.



7. Complete all fields using the proper information. See next page for detailed instructions.





WHAT INFORMATION IS NEEDED TO CREATE NEW LISTS?

List Name - Enter information using this format, all in capital letters.

LibraryAbbr SemesterYr DeptAbbr Course# ProfLastName, First Initial.

Example: CCL F03 P S 270A GREENBERG, D.

(Spacing is important! It effects the way the lists display in the index.)

Effective Dates - Enter the beginning and end dates according to the current semester. All dates should be the standard term dates. Example: 9/3/03-12/20/03.

(Do not set the beginning date to match the date the list was processed.)

Reserve Location - Select the reserve location appropriate to your library.

Reserve Item Type - Select the item type to set the reserve loan period.

8. Example of Reserve window with List Header complete.

The screenshot shows the Voyager Circulation software interface. The main window is titled "Voyager Circulation" and has a menu bar with "File", "Functions", "Reserve", "Options", "Window", and "Help". Below the menu bar is a toolbar with icons for "Charge", "Discharge", "Reserve", "Short Loan", "Item", "Distribution", "Patron", and "Help". The "Reserve" window is open, showing a "Reserve List Header" section with the following fields:

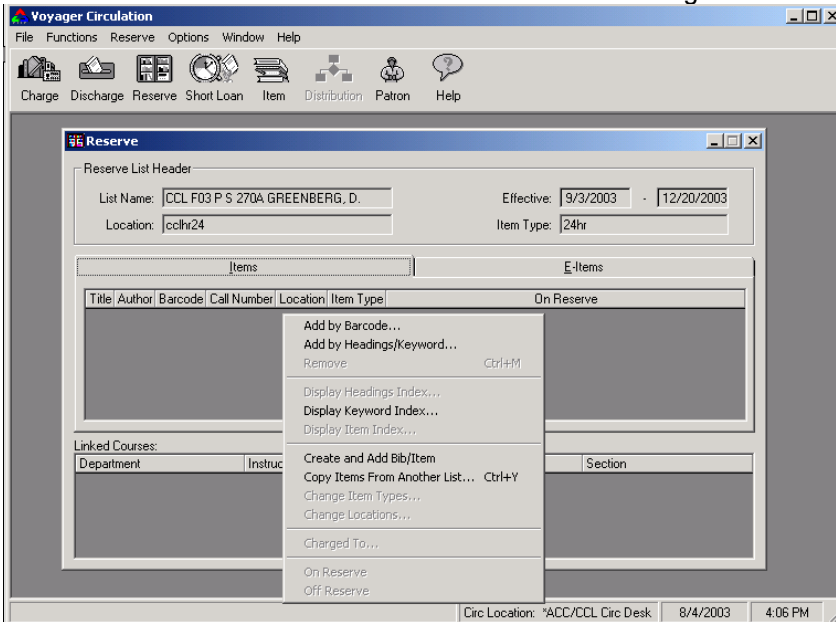
List Name:	CCL F03 P S 270A GREENBERG, D.	Effective:	9/3/2003	-	12/20/2003
Location:	cclhr24	Item Type:	24hr		

Below the header section are two tabs: "Items" and "E-Items". The "Items" tab is active, showing a table with the following columns: Title, Author, Barcode, Call Number, Location, Item Type, and On Reserve. The table is currently empty.

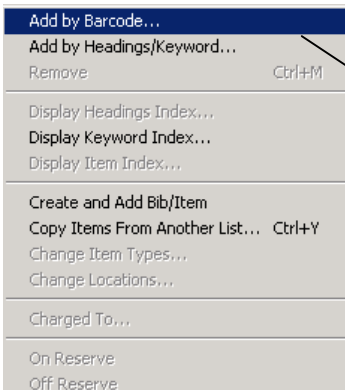
Below the table is a section for "Linked Courses" with a table with the following columns: Department, Instructor, Course, and Section. This table is also empty.

The status bar at the bottom of the window displays "Circ Location: *ACC/CCL Circ Desk", "8/4/2003", and "3:53 PM".

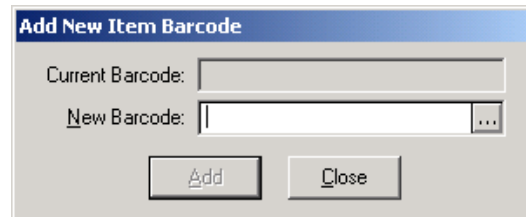
9. You are now ready to begin adding items to the list.
Position arrow in the **MIDDLE THIRD** of the window and right click to bring up the menu.



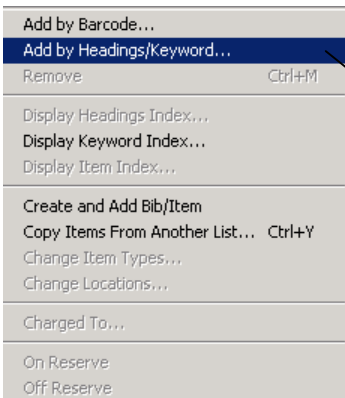
10. If you have the books in hand, select the first option: **Add by Barcode**.



This box will display.
Scan or type in barcodes to add items to the list.



11. If you do NOT have the books in hand, you may choose to use the second option:
Add by Headings/Keyword (this allows you to search online to add the items)



Caution: This is not the advised method!
(details on next page)





Q: WHY THE ADVISEMENT AGAINST ADDING BY HEADINGS/KEYWORD?

A: When you add by Headings/Keyword, items are automatically added to the list. No information is given regarding about the status of the item (i.e., charged, missing, etc).

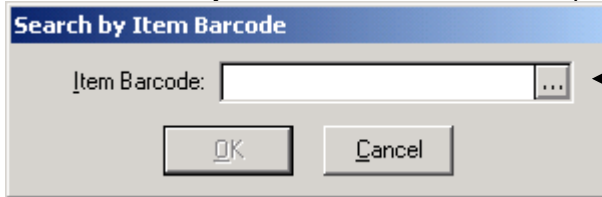
Without status information, you cannot be sure that items will be available for reserve. You also cannot easily recall, call slip, or place holds on the items or read the item notes.

An alternative method is outlined below!

12. Keeping the reserve window open, click the ITEM icon on the main toolbar.



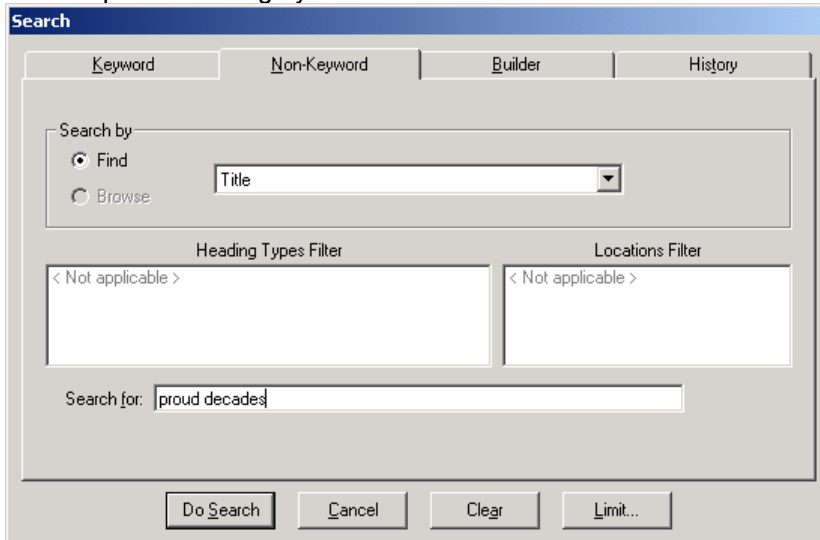
13. The Search by Item Barcode window will display.



Click the ellipsis to open the full item record search window.

14. Begin searching for items to add to the reserve list. Search by title or call number. (Unsure which to use? Ask your Supervisor. CCL Staff - Search by TITLE.)

a. Example: Searching by Title. Enter title and click DO SEARCH.



b. Title Keyword Index will display. Click OK.

Titles Index

Title	Author	Full Title	Imprint
The proud decades : America in war and in peace, 1941-1960 /	Diggins, John P.	Proud decades : America in war and in peace, 1941-1960 / John Patrick Diggins.	New York : Norton, c1988.

OK Cancel Search

1 Record Found Search: Title=proud decades

c. If there is only one holding, the item record will immediately open. If there are multiple holdings, the Multiple Holdings window will display (seen here).

Retrieve Holdings

Location Name	Call Number
ccl	E169.12 D56 1988 (LC)
ccl	E169.12 D56 1988 (LC)
ccl	E169.12 D56 1988 (LC)

OK Cancel

d. Select the first holding and click OK. Item record will open.

Item Record

Title
Proud decades : America in war and in peace, 1941-1960 / John Patrick Diggins.

0 0

Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
ccl	circ	Charged			1	39002004226925

Bib Brief Holdings Item/Holdings Item Details Item History

Author: Diggins, John P.

Edition: 1st. ed.

Publisher: Norton, Place/Date: New York : 1988

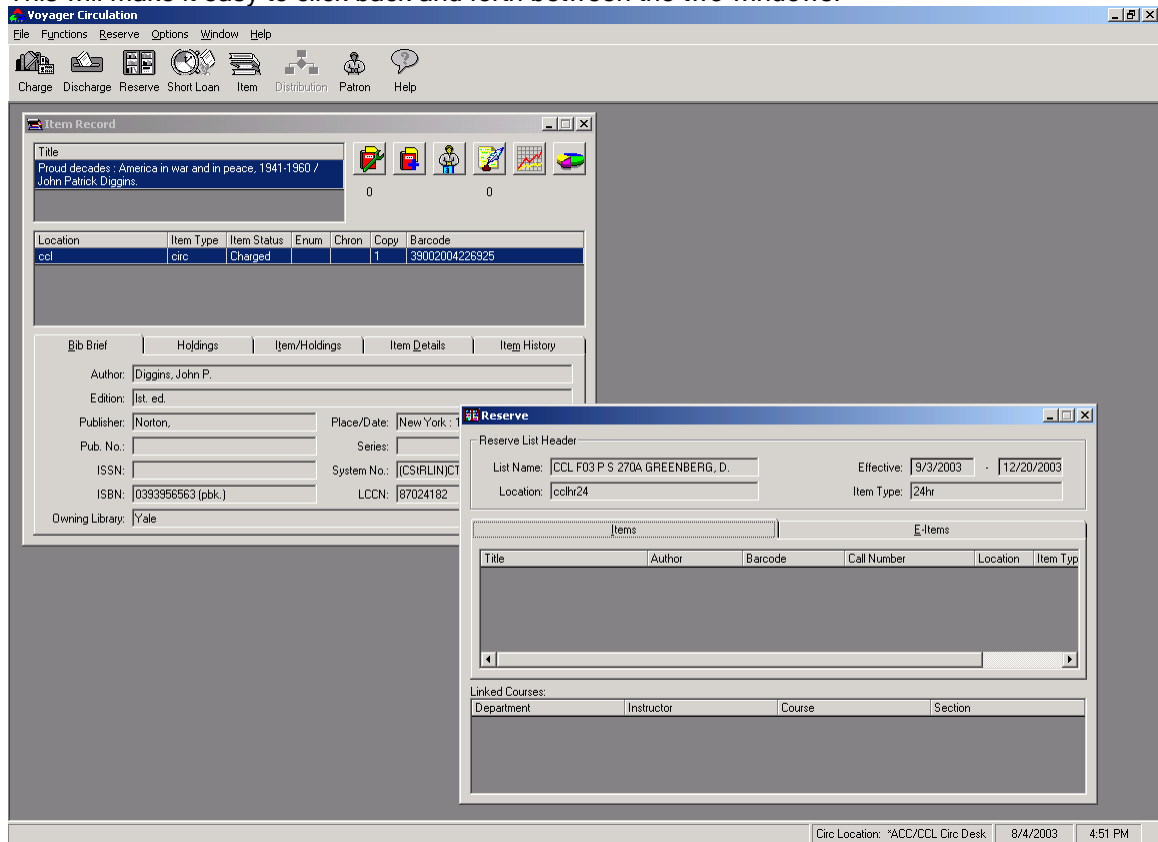
Pub. No.: Series:

ISSN: System No.: (CS:RLIN)CTYG88-B39602

ISBN: 0393956563 (pbk.) LCCN: 87024182

Owning Library: Yale

e. Position Item Record window and Reserve windows as seen below. This will make it easy to click back and forth between the two windows.



f. The item in the example is CHARGED. Before adding it to the list, place RECALL on the item using the Reserve pseudo-patron* for your library.

If you do not know the ID number for the pseudo-patron, ask your Supervisor for assistance.

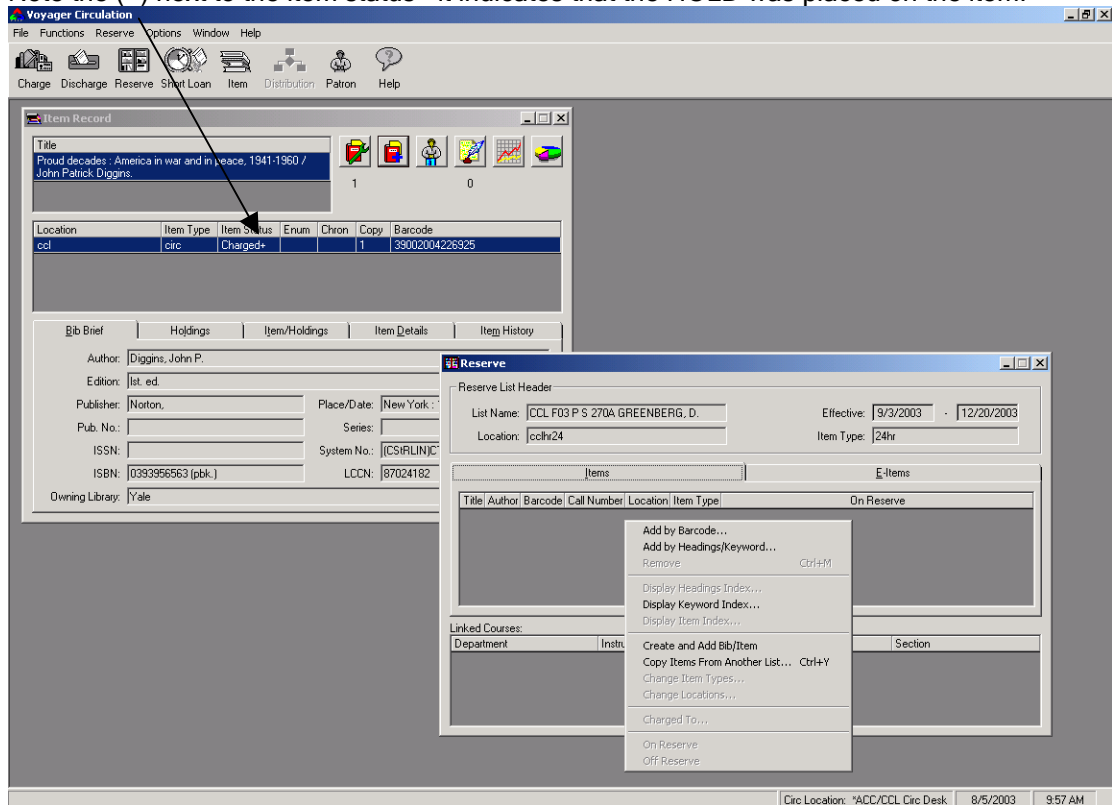


HOLDS, RECALLS, and CALL SLIPS are basic Circulation functions. If you are unsure of the procedures involved, see your Supervisor for further training.

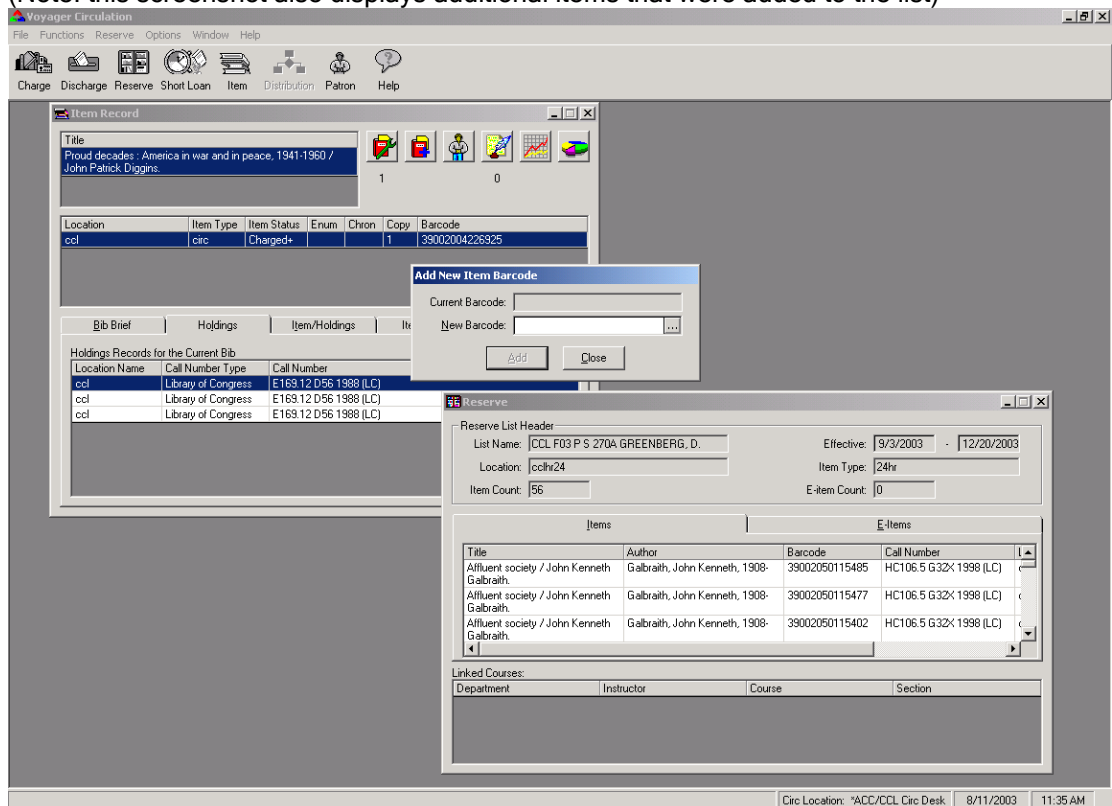
15. Once the item has been searched and any ITEM STATUS ACTIONS have been taken, it is time to add the item to the reserve list. Right click in the **MIDDLE THIRD** of the Reserve window and select the first option, ADD BY BARCODE.

(see next page for details)

Both the Item Record and Reserve windows are open. The Reserve action menu is displayed. Note the (+) next to the item status - it indicates that the HOLD was placed on the item.



After selecting Add By Barcode, your screen will look like this. (Note: this screenshot also displays additional items that were added to the list)



16. Using the information displayed in the Item Record, type in the item barcode. Click OK.

The screenshot shows the Voyager Circulation interface. The 'Item Record' window is open, displaying the following information:

- Title:** Proud decades : America in war and in peace, 1941-1960 / John Patrick Diggins.
- Location:** ccl
- Item Type:** circ
- Item Status:** Charged+
- Enum:**
- Chron:**
- Copy:** 1
- Barcode:** 39002004226925

The 'Holdings Records for the Current Bib' table is also visible:

Location Name	Call Number	Type
ccl	Library of Congress	E169.12 D56 1988 (LC)
ccl	Library of Congress	E169.12 D56 1988 (LC)
ccl	Library of Congress	E169.12 D56 1988 (LC)

An 'Add New Item Barcode' dialog box is open, showing:

- Current Barcode:**
- New Barcode:** 39002004226925

Buttons for 'Add' and 'Close' are visible.

The 'Reserve' window is also open, showing the 'Reserve List Header' and 'Items' table.

Reserve List Header:

- List Name:** CCL F03 P S 270A GREENBERG, D.
- Effective:** 9/3/2003 - 12/20/2003
- Location:** cclhr24
- Item Type:** 24hr
- Item Count:** 56
- E-item Count:** 0

Items Table:

Title	Author	Barcode	Call Number
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115485	HC106.5 G32x 1998 (LC)
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115477	HC106.5 G32x 1998 (LC)
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115402	HC106.5 G32x 1998 (LC)

The status bar at the bottom indicates: Circ Location: *ACC/CCL Circ Desk 8/11/2003 11:36 AM

17. The item has been added to the reserve list.

The screenshot shows the Voyager Circulation interface. The 'Item Record' window is open, displaying the same information as in the previous screenshot.

The 'Reserve' window is open, showing the 'Reserve List Header' and 'Items' table. The item from the Item Record has been added to the reserve list.

Reserve List Header:

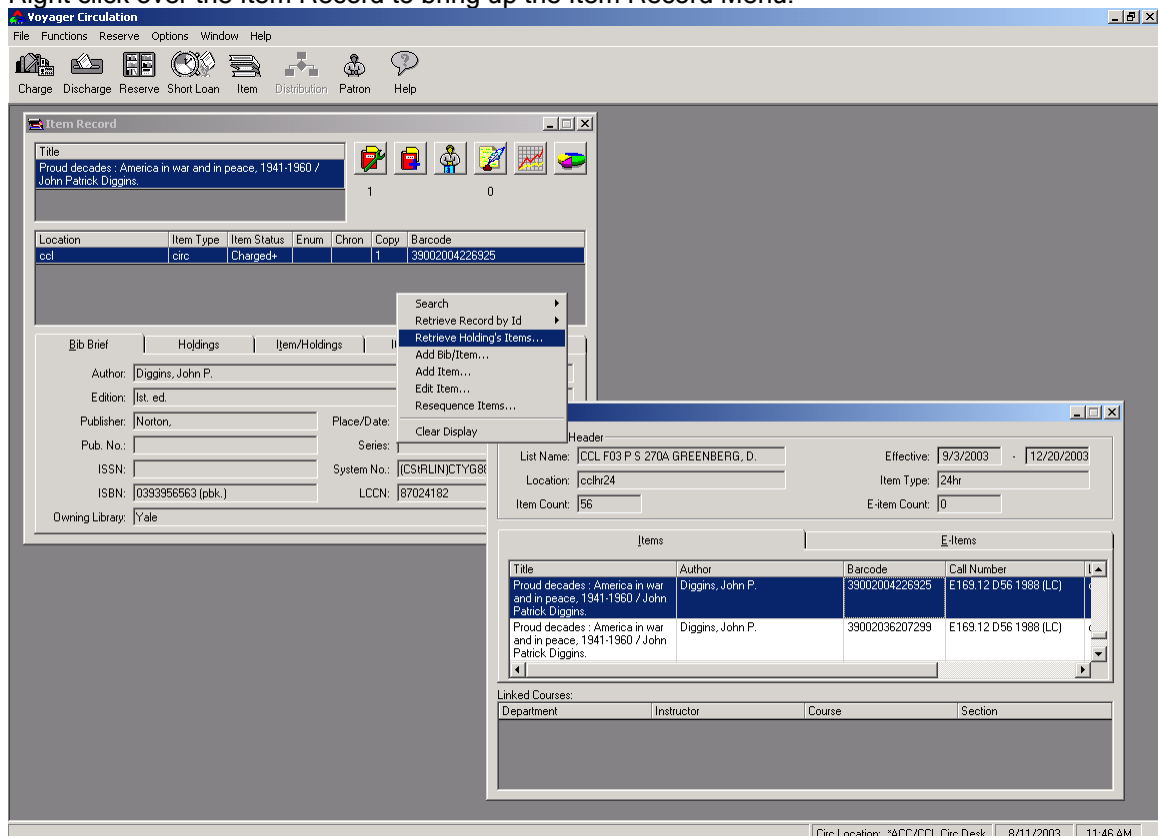
- List Name:** CCL F03 P S 270A GREENBERG, D.
- Effective:** 9/3/2003 - 12/20/2003
- Location:** cclhr24
- Item Type:** 24hr
- Item Count:** 56
- E-item Count:** 0

Items Table:

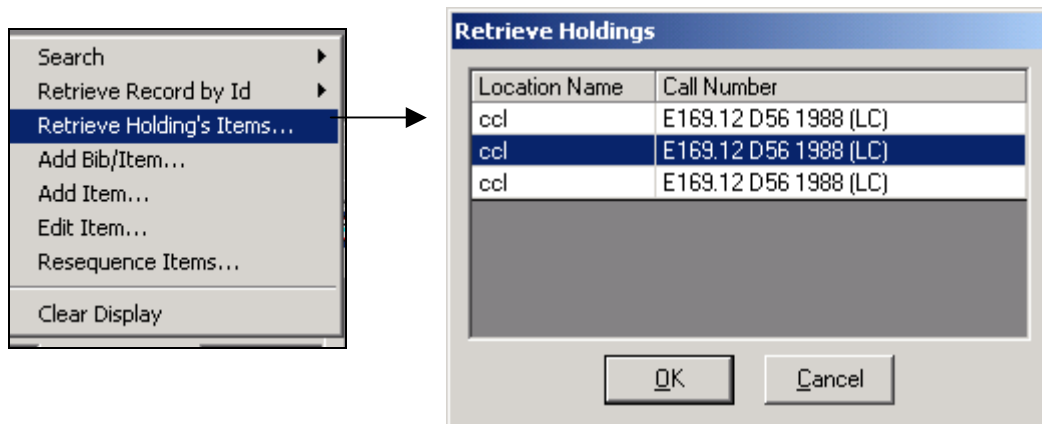
Title	Author	Barcode	Call Number
Proud decades : America in war and in peace, 1941-1960 / John Patrick Diggins.	Diggins, John P.	39002004226925	E169.12 D56 1988 (LC)
Proud decades : America in war and in peace, 1941-1960 / John Patrick Diggins.	Diggins, John P.	39002036207299	E169.12 D56 1988 (LC)

The status bar at the bottom indicates: Circ Location: *ACC/CCL Circ Desk 8/11/2003 11:34 AM

18. Now, you must return to the Item Record window and bring up the addition holdings. Right click over the Item Record to bring up the Item Record Menu.



19. Select the third option: Retrieve Holding's Items. The Retrieve Holdings window will open. Select the second holding and the steps followed for the first item (described above).



20. Continue using the steps outlined above until all holdings have been added to the list.

C: Copying Items from Another List



Before beginning this section, you **MUST** confirm that is an existing list in Voyager to copy.

For instructions, see **Section A: Preparation & Checking for Existing Lists**.

If an existing list is not found, **STOP**. Refer to **Section B: Creating New Lists**

1. Professors will often ask to re-use lists from previous semesters. If the preliminary search for existing lists brings up previous lists, ask your Supervisor whether to re-use.

Example: Looking by Instructor (C. Horan) for P S 245. There is an existing list.

List Title	Effective	Expires
CCL F02 P S 253A HORAN, C.	9/4/2002	12/22/2002
CCL SP03 P S 245B HORAN, C.	1/13/2003	5/13/2003

2. Click Cancel to close the Multiple Reserve List window. Reserve window remains open. In order to re-use an old list, you must first create a new list header, then import items.

****VERY IMPORTANT: DO NOT EDIT OR MODIFY A PREVIOUS LIST!****

Reserve List Header

List Name: Effective: -

Location: Item Type:

Item Count: E-Item Count:

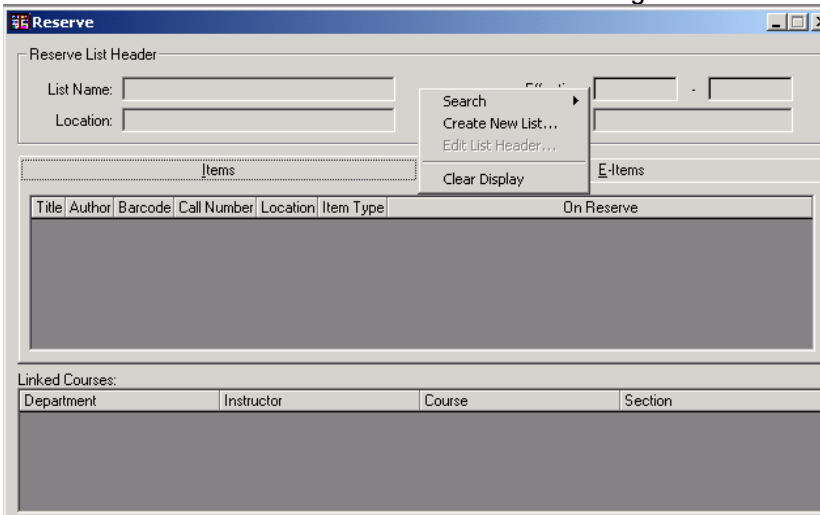
Title	Author	Barcode	Call Number	Location	Item Type	On Reserve
-------	--------	---------	-------------	----------	-----------	------------

Linked Courses:

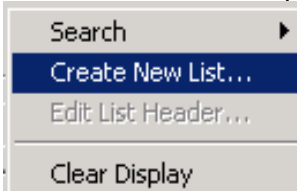
Department	Instructor	Course	Section
------------	------------	--------	---------

Circ Location: *ACC/CCL Circ Desk 8/11/2003 11:47 AM

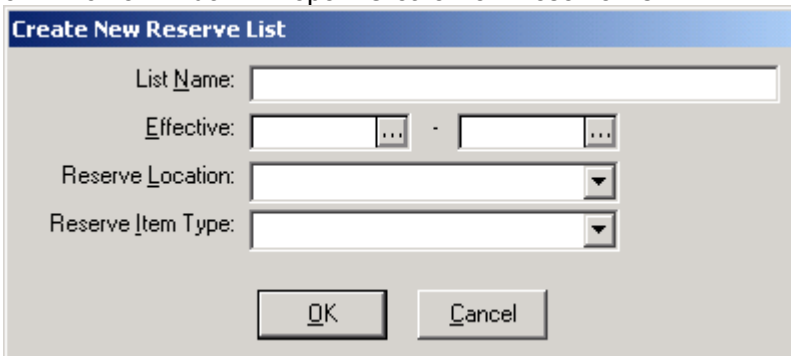
3. Place arrow in the **TOP THIRD** of the window. Right click mouse to display menu.



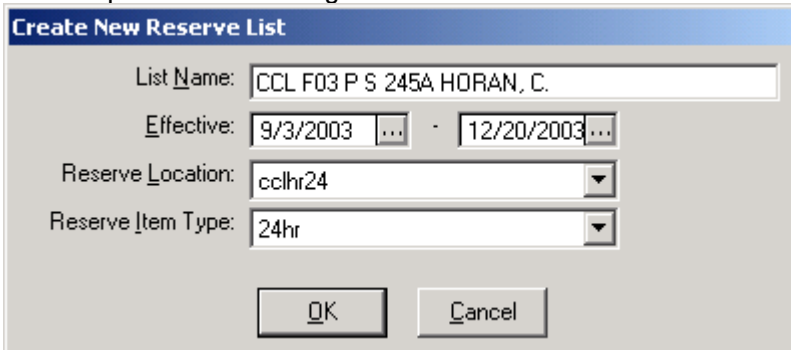
4. Select the second option on the menu: Create New List.



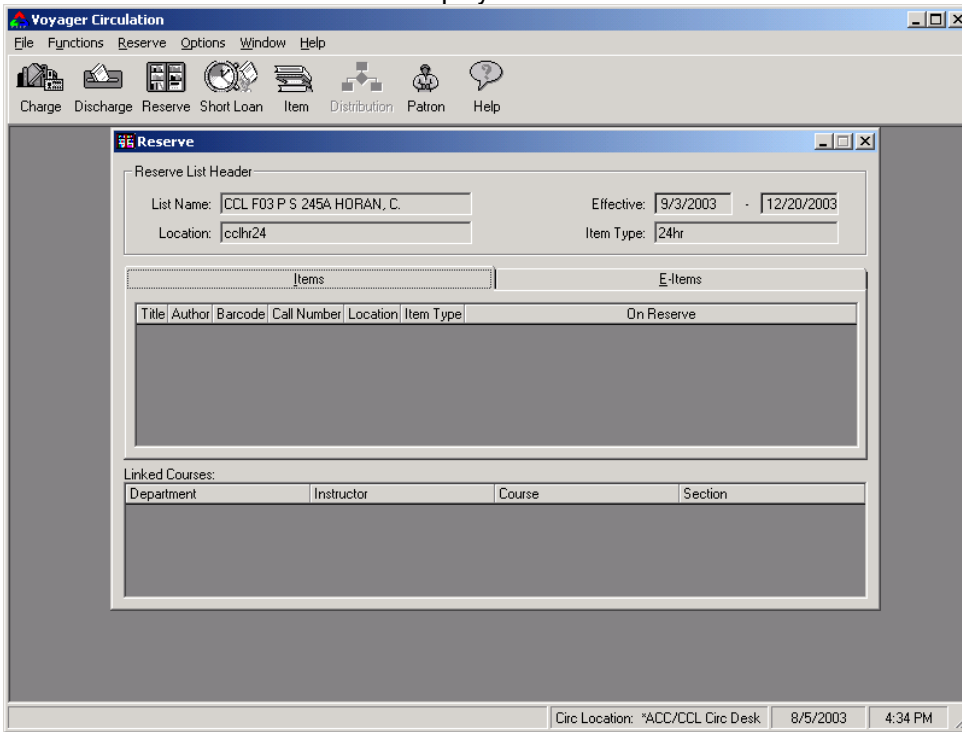
5. Another window will open: Create New Reserve List.



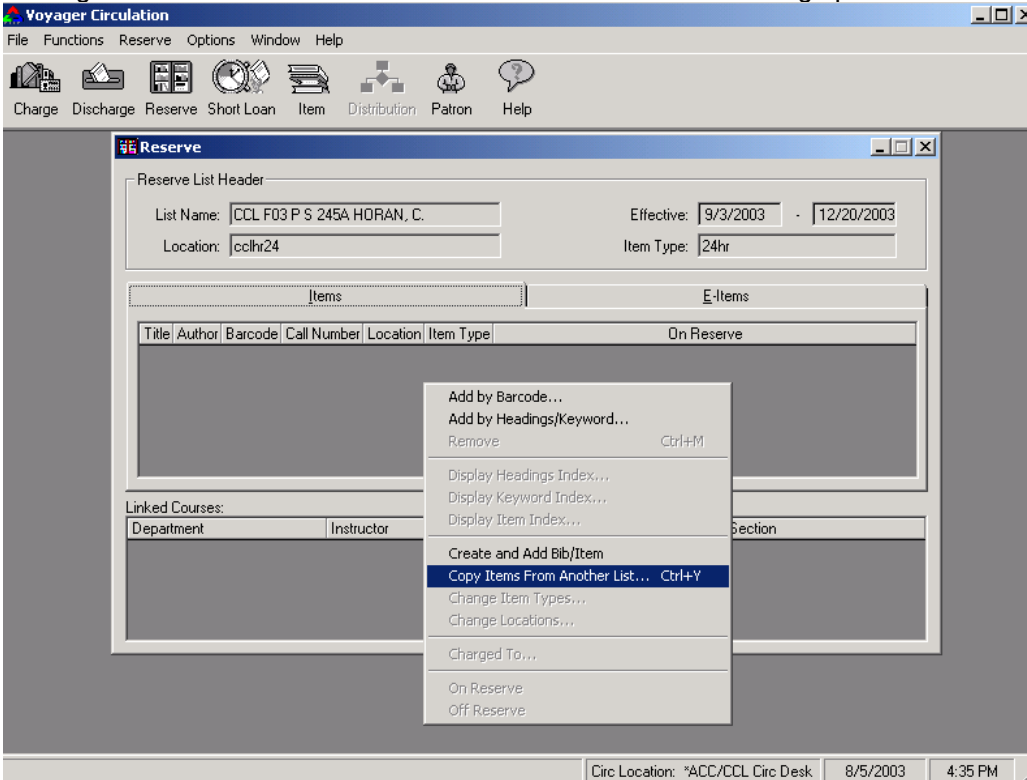
6. Complete all fields using the information for the CURRENT term and click OK.



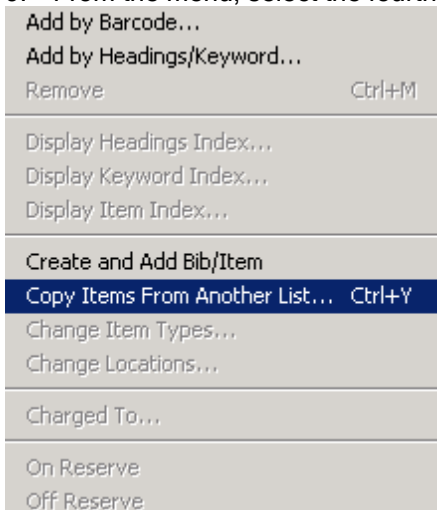
7. The Reserve window will now display with the new list header.



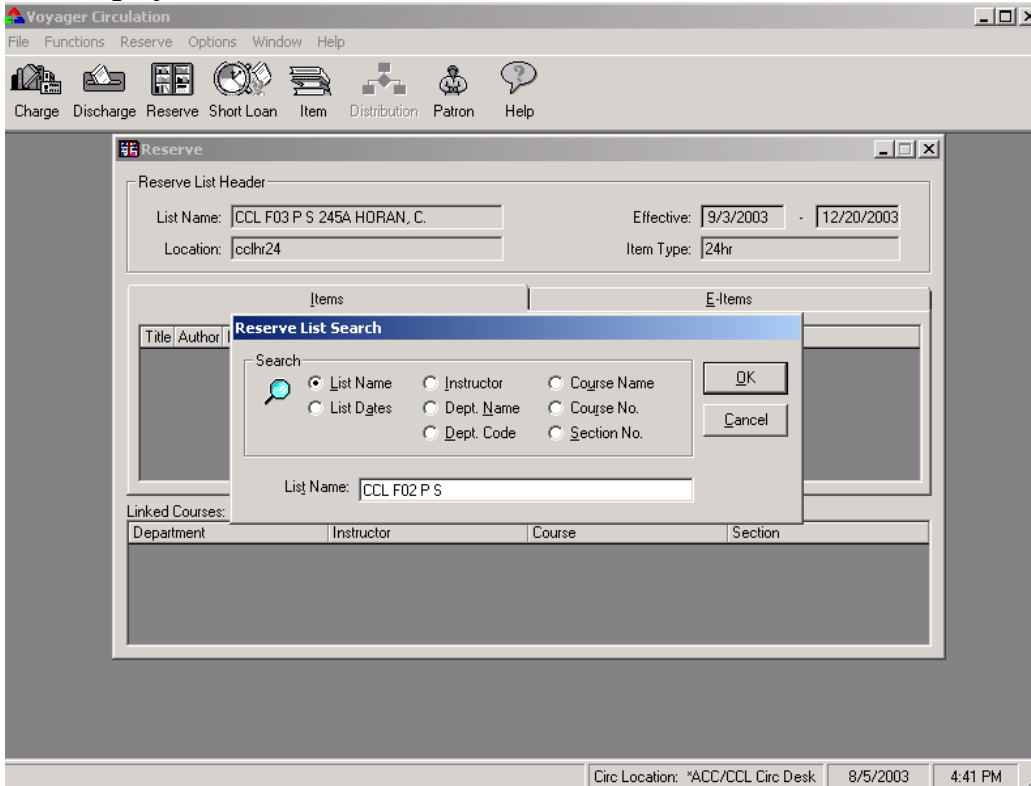
8. Right click in the MIDDLE THIRD of the Reserve window to bring up the menu.



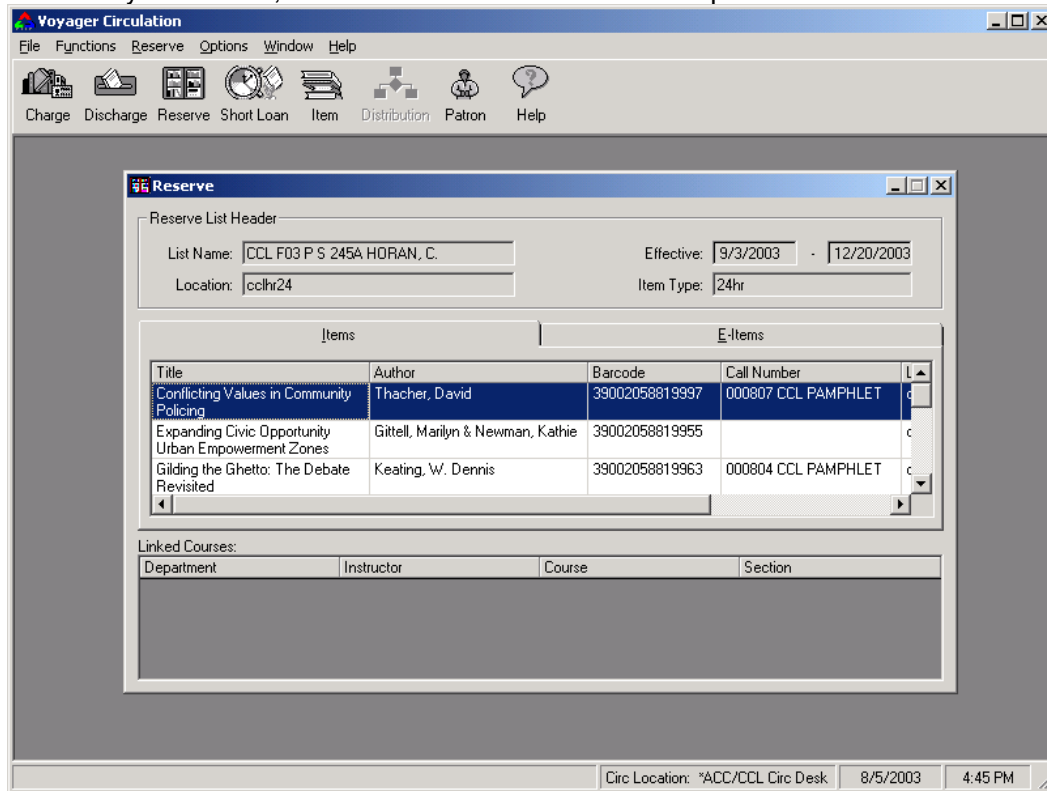
9. From the menu, select the fourth option available: Copy Items from Another List



10. The Reserve List search box will open. Search for the list you want to copy and click OK. (Note: This screenshot is from the previous version of Voyager. The Reserve List Search box differs slightly from the current version, but the instructions are the same as shown below.)



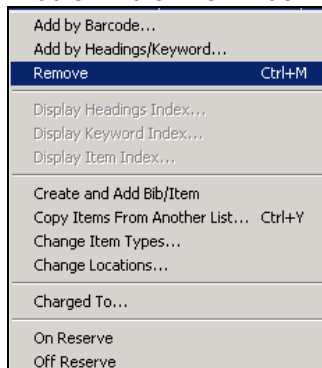
11. Once you click OK, ALL items from the old list will be copied onto the new list.



12. Review the list to be sure that all items should be used. If it is complete, proceed to Section D: Linking Lists. If it is not complete, you may either add or remove items before linking.

13. To add additional items: see instructions under Section B: Creating New Lists earlier in this manual.

14. To remove items: select the item you wish to remove. Hold down the control key to select multiple items. Once items have been selected (highlighted in blue), right click in the middle third of the window and select Remove. Items will be PERMANENTLY removed.



D: Linking Lists



Linking Lists is an essential final step of list processing.

The information provided by linking determines how the list will display in the OPAC.

Multiple courses can be linked to a single list if the class is cross-listed or if a professor is using the same list for multiple courses in the same semester.

1. Courses can be linked at any time after the List Header is created. However, this step is usually completed as a third step following Creating the List Header and Adding Items.

List Header is complete. All items have been added to this list.

Reserve List Header

List Name: CCL F03 P S 270A GREENBERG, D. Effective: 9/3/2003 - 12/20/2003

Location: cclhr24 Item Type: 24hr

Item Count: 56 E-item Count: 0

Title	Author	Barcode	Call Number
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115485	HC106.5 G32X 1998 (LC)
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115477	HC106.5 G32X 1998 (LC)
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115402	HC106.5 G32X 1998 (LC)

Linked Courses:

Department	Instructor	Course	Section
------------	------------	--------	---------

2. Position arrow in the **BOTTOM THIRD** of the window. Right click to display menu.

Reserve List Header

List Name: CCL F03 P S 270A GREENBERG, D. Effective: 9/3/2003 - 12/20/2003

Location: cclhr24 Item Type: 24hr

Item Count: 56 E-item Count: 0

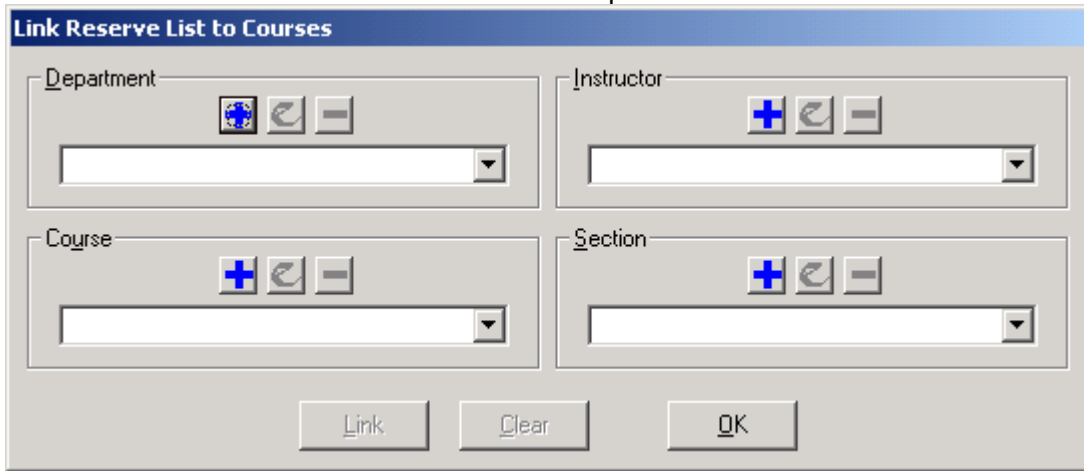
Title	Author	Barcode	Call Number
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115485	HC106.5 G32X 1998 (LC)
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115477	HC106.5 G32X 1998 (LC)
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115402	HC106.5 G32X 1998 (LC)

Linked Courses:

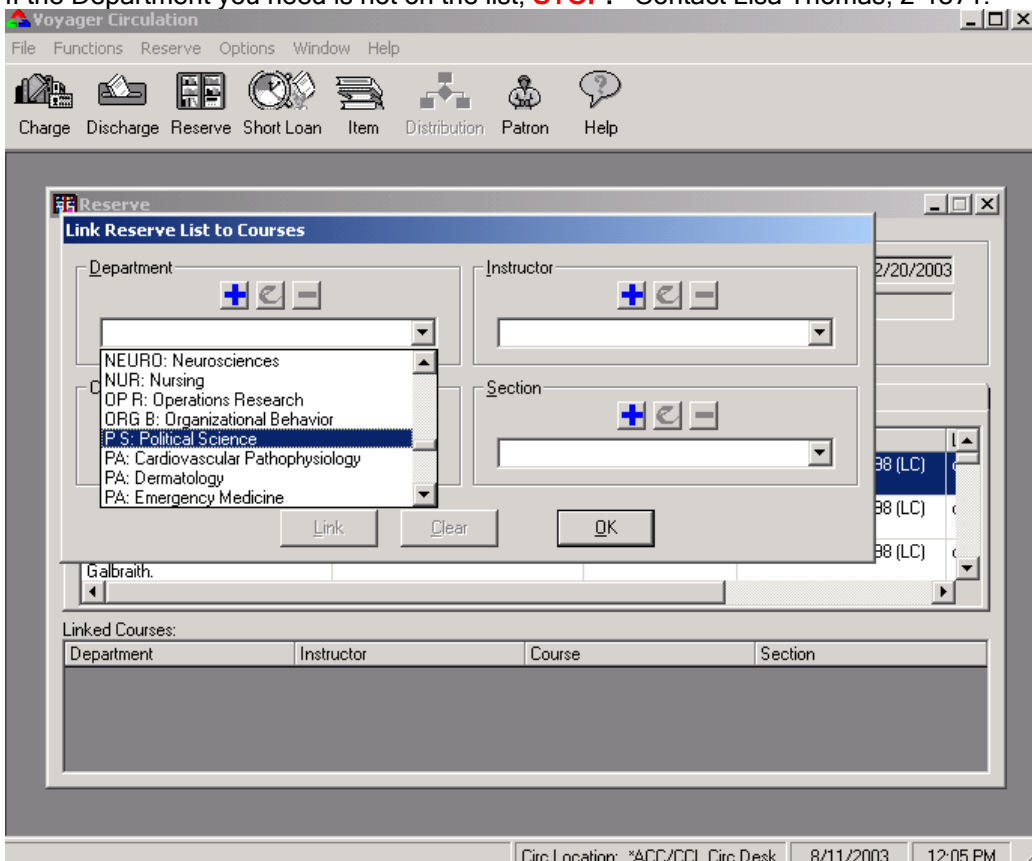
Department	Instructor	Course	Section
------------	------------	--------	---------

Link Courses... Ctrl+L
Unlink Course Ctrl+U

3. The Link Reserve List to Courses window will open.



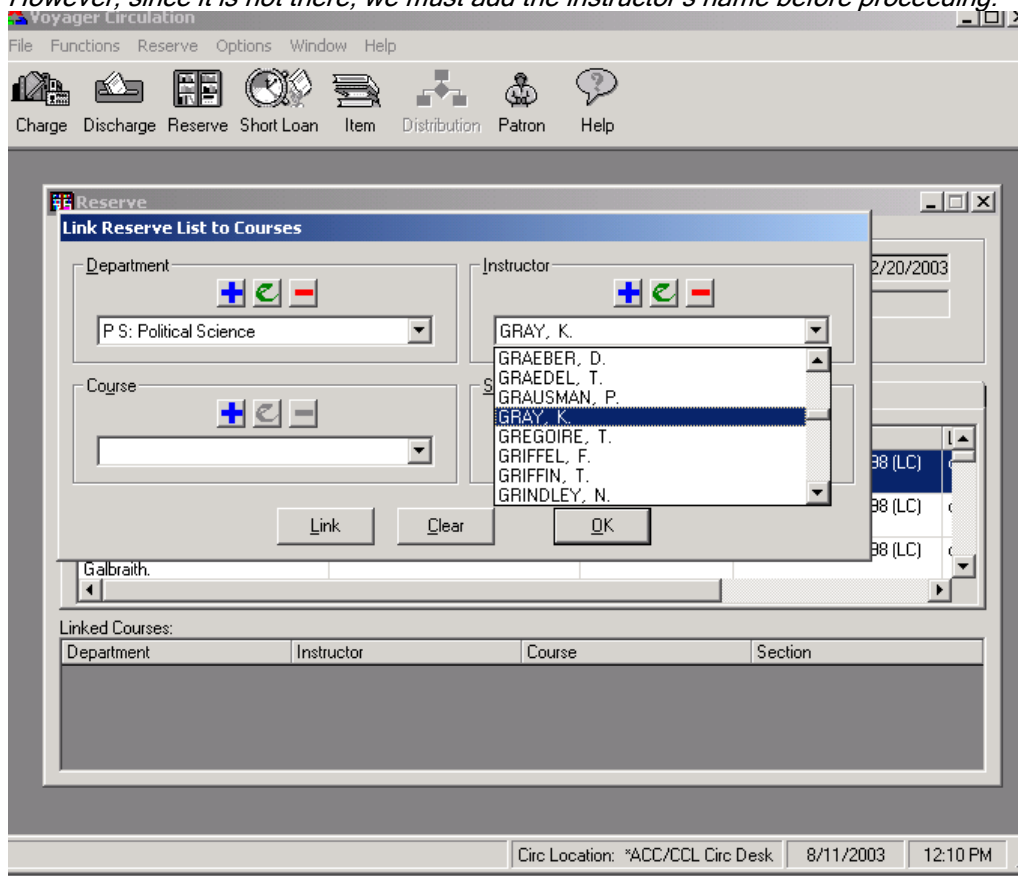
4. Select the proper Department from the drop down menu.
If the Department you need is not on the list, **STOP**. Contact Lisa Thomas, 2-1871.



5. Next, select the proper Instructor.
If the Instructor you need is not on the list, you will have to add the name to the database.

(see next page for examples)

Looking for Greenberg, D. If the name were on the list, we would simply select it. However, since it is not there, we must add the instructor's name before proceeding.



6. To add an Instructor to the list, click the  above the Instructor drop down menu list. This window will open:

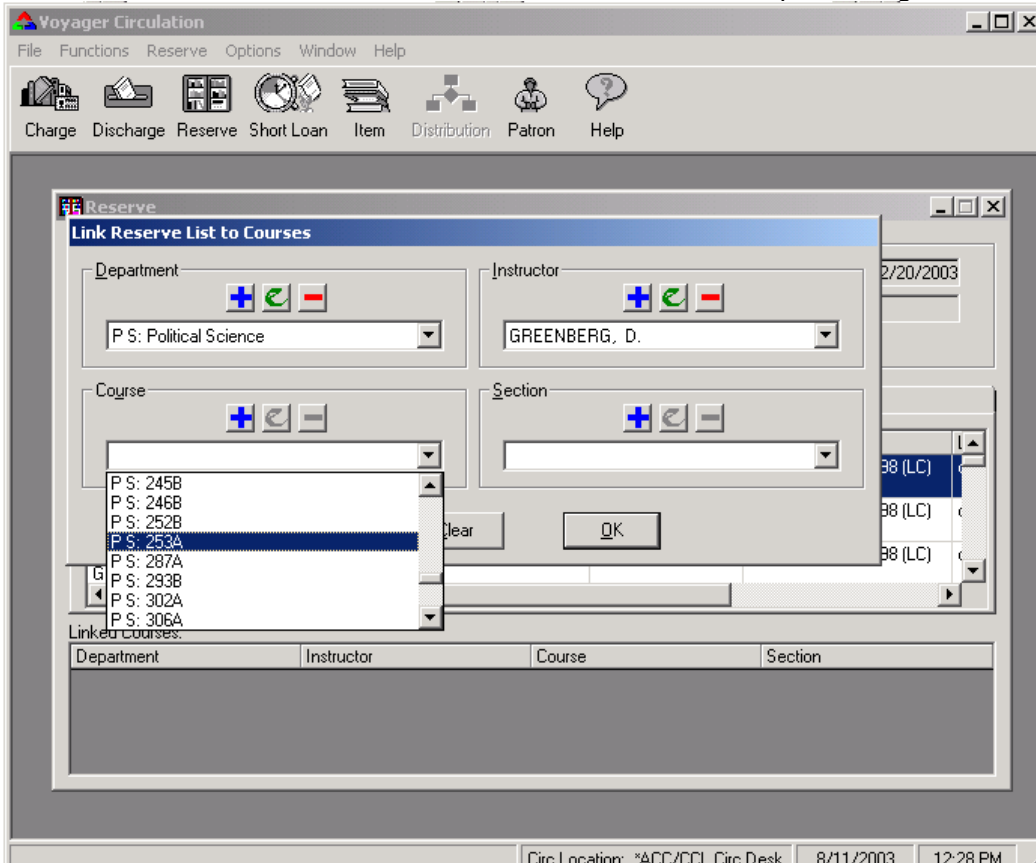
7. Using CAPITAL LETTERS, enter the complete Last Name. In the second field, instead of the First Name, enter only the first initial and a period. If the Last Name is especially common and you know the middle initial, you may enter both first and middle initial here. DO NOT USE the Title Field.

- The instructor's name will now appear in the Instructor field. It will remain a permanent part of the drop down menu for future use.

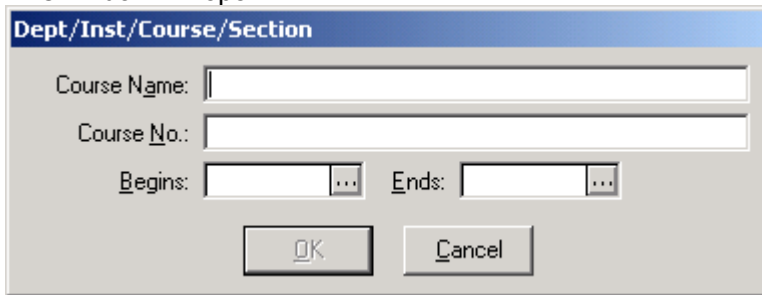


- Next, search the drop down list under Course for the relevant Course Number. If the Course you need is not on the list, you will have to add it to the database.

Looking for P S 270A. If it were on the list, we would simply select it. However, since it is not there, we must add the information before proceeding.



10. To add a Course to the list, click the  above the Course drop down menu list. This window will open:



Dept/Inst/Course/Section

Course Name:

Course No.:

Begins: ... Ends: ...



Warning! This next step often creates confusion.

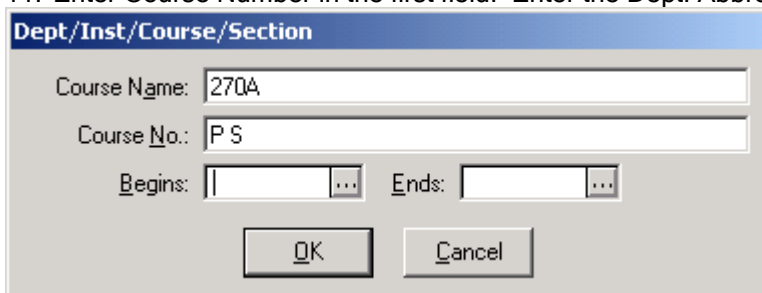
For the information to display properly, you must follow these instructions carefully.

In the Course Name field: enter the **Course Number**

In the Course No. field: enter the **Departmental Abbreviation**

See example below.

11. Enter Course Number in the first field. Enter the Dept. Abbreviation in the second field.



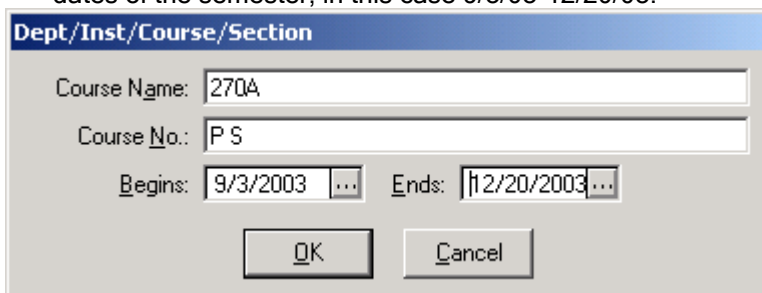
Dept/Inst/Course/Section

Course Name:

Course No.:

Begins: ... Ends: ...

12. For the Begin and End dates, use the dates corresponding to the beginning and end dates of the semester, in this case 9/3/03-12/20/03.



Dept/Inst/Course/Section

Course Name:

Course No.:

Begins: ... Ends: ...

13. The course information will now appear in the Course field. It will remain a permanent part of the drop down menu for future use.

The screenshot shows a dialog box titled "Link Reserve List to Courses". It has four main sections: Department, Instructor, Course, and Section. Each section has a dropdown menu and three small icons (+, refresh, -). The Department dropdown is set to "P S: Political Science", the Instructor dropdown is set to "GREENBERG, D.", and the Course dropdown is set to "P S: 270A". The Section dropdown is currently empty. At the bottom of the dialog are three buttons: "Link", "Clear", and "OK".

14. The last step in linking is to select Section information. This field keeps track of section number and size of class.



Important Note:

If the course you are linking DOES NOT have a section number, select an entry with the number 0 (zero) in the section field and the appropriate class size.

If the course DOES have a section number, look for an entry with the section number and class size corresponding to the course you are working on.

If there is not an entry to match the circumstances you need, you must create a new entry.

Remember: ALWAYS check the drop down menu list first!

15. In this case, there is no section number for the class and there is an existing entry with the appropriate number of students. This entry is selected from the list.

The screenshot shows the "Voyager Circulation" software interface. A dialog box titled "Link Reserve List to Courses" is open. The Department is "P S: Political Science", the Instructor is "GREENBERG, D.", and the Course is "P S: 270A". The Section dropdown menu is open, showing a list of options: "0: 70 students", "0: 18 students", "0: 130 students", "0: 140 students", "0: 340 students", "0: 65 students", and "0: 35 students". The "0: 18 students" option is selected. Below the dialog box, there is a table for "Linked Courses" with columns for Department, Instructor, Course, and Section. The status bar at the bottom shows "Circ Location: *ACC/CCL Circ Desk", "8/11/2003", and "12:57 PM".

16. All selected or entered information will now display in the Linking window. Click Link to confirm information and OK to close the window.

17. If you forget to click Link, or click OK first, you will receive this message box. Click OK to close the message box and return to the above screen to click Link, then OK.

18. Completed list. The Linked Information shows in the **BOTTOM THIRD** of the window.

Reserve List Header

List Name: CCL F03 P S 270A GREENBERG, D. Effective: 9/3/2003 - 12/20/2003
 Location: cclhr24 Item Type: 24hr
 Item Count: 56 E-item Count: 0

Items		E-Items	
Title	Author	Barcode	Call Number
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115485	HC106.5 G32X 1998 (LC)
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115477	HC106.5 G32X 1998 (LC)
Affluent society / John Kenneth Galbraith.	Galbraith, John Kenneth, 1908-	39002050115402	HC106.5 G32X 1998 (LC)

Linked Courses:

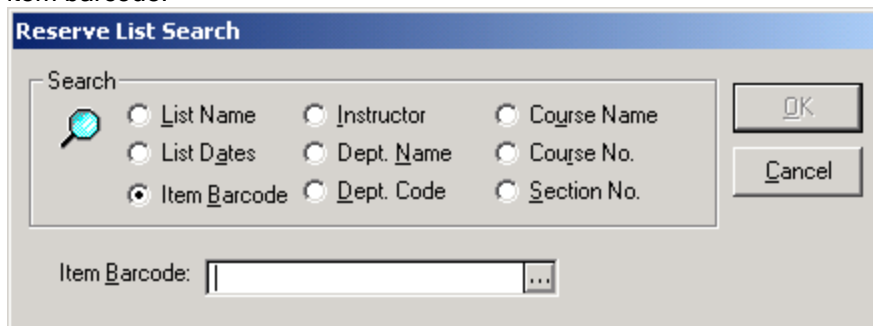
Department	Instructor	Course	Section
P S: Political Science	GREENBERG, D.	P S: 270A	0 (18 students)

Circ Location: *ACC/CCL Circ Desk 8/11/2003 1:10 PM

E: Processing Books with Reserve Holds

Books that have been RECALLED or CALL SLIPPED with a reserve pseudo-patron need to be processed using the following steps.

1. Check out the items to your reserve patron ID. Then, discharge the items. This removes the hold from the books and confirms that the items have arrived in your library.
2. Click the Reserve Icon to open the reserve window. Click Item Barcode and scan or type in item barcode.



Reserve List Search

Search

List Name Instructor Course Name

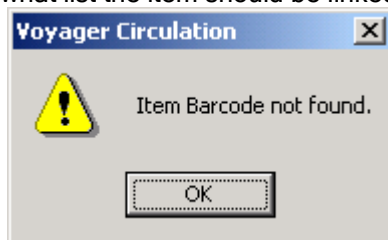
List Dates Dept. Name Course No.

Item Barcode Dept. Code Section No.

Item Barcode:

OK Cancel

3. If the item is linked to a reserve list, that list will open. If the item is not linked to a reserve list, the following window will display. Refer to the original paper list submitted to determine what list the item should be linked to.



4. Once the list is open, or once the item is added, highlight the item and right click in the MIDDLE THIRD of the window to open the menu. Select ON RESERVE to activate the item.