

# Voyager Circulation Module

## Reference Sheet for Liaisons

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### Introduction

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Voyager's Circulation ("Circ") module allows staff to search the library's online public library catalog (OPAC). Staff may view usage statistics and take advantage of search features that are unavailable to the public. Voyager Circ is not an OPAC, so it won't always behave like one, but it is still very useful.

This document assumes that users are knowledgeable about catalog and database searching. The terms HOMER, HOMER Web, and WebVoyage (used synonymously) refer to the OPAC's public face. "Circ" refers to the Circulation module, including its OPAC search capabilities. This is neither a complete search guide nor step-by-step manual. Rather, this guide provides tips that are not collated anywhere else in hopes of helping liaisons navigate the Voyager Circulation module.

*Thanks to Melissa Wisner and Barbara Mitchell for setting up the Circulation module and logins for liaisons.*

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### Other Information Sources

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- Voyager Circ's **Online Help** has basic mechanics to help users navigate the interface.
- Relevant sections from the **Voyager manuals** (Circulation, WebVoyage [OPAC], and SysAdmin) have been copied and placed on the RIS counter. These have detailed step-by-step instructions for using Voyager Circulation.
- Take a **virtual tour** of the Circulation module (PPT by Melissa Wisner). This is only accessible to UConn library staff.  
[http://alectrona.lib.uconn.edu/Teams/LAT/Circulation\\_module/Liaison%5FCirculation%5FPresentation%2Eppt](http://alectrona.lib.uconn.edu/Teams/LAT/Circulation_module/Liaison%5FCirculation%5FPresentation%2Eppt)

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### Getting Started

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All the liaison computers, plus the two reference desk computers should have Voyager clients. Look for the Voyager folder on your desktop or in your Program menu in the Start menu. Contact Melissa Wisner if there's a problem.

#### Logging In:

Open the module

Operator ID: *(The login lets you view items. You cannot view patron information or change item statuses.)*

Password:

After you click OK, select **Babbidge Circ Desk** (or any library) as the current location. *This does NOT limit your searches to a particular location. It's just part of logging in. (The regular search screen has a Limits button.)*

#### Get Into "Item Mode":

Click on the **Item** icon at the top of the window. *You must always be in Item mode to do any searching.*

You will stay in item mode until you click another icon at the top (which you shouldn't really need).

When you first get into item mode, you will see a barcode search box. Hit Cancel (or the Escape button).

#### Start a Search:

Option 1: under the **Item Menu**, select **Search ► Headings/Keyword**.

Option 1: right click and select **Search ► Headings/Keyword**.

Option 3: press **Shift-F1** (quickest method).

Option 4: when viewing a results lists, click the **Search** button or type **Alt-s** (very handy).

Option 5: when logging in and at the barcode search screen, click the three dots (...), rather than clicking Cancel.

*You cannot start a search while displaying the full bibliographic record. Click Close or press Escape first.*

#### Things to Remember Before Proceeding:

Most search and display options are listed under the Item Menu, but only some features are under the right click.

Set **Session Preferences** (under the Options Menu) to "retain last" and use "auto truncation" (it should be the default).

Otherwise, you'll have to type a question mark (?) at the ends of your heading searches.

## Which Search Do I Use?

The Circ module uses the “real” Voyager search names, rather than those presented to the public in HOMER. This can make searching confusing at first. The table below helps you identify the basic searches you need.

The **Non-Keyword** tab has the “string” searches (a.k.a. “heading,” “left anchored,” or “phrase”). Searches are selected from a drop-down menu. The most frequently or recently used searches float to the top. The rest are randomly arranged. Type the first letter (repeat if needed) to select searches more quickly. Circ has many searches that are not in HOMER, including sub-indexes for different types of authors, titles, or subjects (e.g., LC vs. medical subject headings).

Some Non-Keyword searches (identified below) have **Find** and **Browse** buttons. The Find button retrieves only items beginning with the typed characters. The Browse button drops you into an endless browse list, allowing you to go forward or backward past your starting point.

The **Keyword** tab has our HOMER Boolean and Relevance searches.

The **Builder** tab is the same as HOMER’s Advanced Search, but has dozens more keyword indexes. Try them!

The **History** tab has similar features to those in HOMER, but uses Voyager’s search names.

To do this HOMER search	Select this tab/search in Voyager Circulation	Notes
Advanced Search	Builder tab	Has extra keyword indexes.
Author (option 1)	Non-Keyword tab, then <b>OPAC Names Headings Search</b>	<ul style="list-style-type: none"> <li>Same as HOMER’s Author search: select from a list of names before seeing the titles.</li> <li>Find and Browse buttons are available.</li> </ul>
Author (option 2)	Non-Keyword tab, then <b>Names</b>	Skips the name headings and goes to a single long list arr. alpha by author with secondary title sort.
Author (option 3)	Builder tab, then select <b>Author Keywords</b> OR <b>Keyword tab (Boolean)</b> , then <b>nkey [term]</b>	Searches all authors, but sorts by title (nkey=name keyword).
Barcode	Item Menu, then Search (or Shift-F2)	
Bib or Item ID	Item Menu, then Retrieve Record by ID.	
Call Number	Non-Keyword tab, then <b>MFHD Call Number</b>	<ul style="list-style-type: none"> <li>Find and Browse buttons are available.</li> <li>Browse button can filter by location or class type (latter is required for non-LC numbers).</li> </ul>
ISBN	Non-Keyword tab, then ISBN (020 a z)	
ISSN	Non-Keyword tab, then ISSN (022 a y z)	
Journal Title (option 1)	Non-Keyword tab, then <b>Journal Title&lt;</b> (with the angle bracket)	Same as HOMER’s Journal Title search. (a.k.a. JALL, or Journal All in manual).
Journal Title (option 2)	Non-Keyword tab, then <b>Journal Title</b> (no <), OR <b>Keyword tab (Boolean)</b> , then <b>jkey [term]</b>	Is a journal-title keyword search. 1st has implied “and.” In 2nd, jkey means “journal keyword.”
Keyword Boolean	Keyword tab, then <b>Boolean</b> button	This is called “Command” in the Search History.
Keyword Relevance	Keyword tab, then <b>Relevance</b> button	This is called “Keyword” in the Search History.
OCLC	Non-Keyword tab, then <b>System No. (035a z)</b>	
Prolific Author/Composer	Non-Keyword tab, then <b>OPAC Name/Titles Heading Search</b>	
Subject Heading (option 1)	Non-Keyword tab, then <b>OPAC Subject Headings Search</b>	<ul style="list-style-type: none"> <li>Same as HOMER’s Subject Headings search: select from a list of headings to view titles.</li> <li>Find and Browse buttons are available.</li> </ul>
Subject Heading (option 2)	Non-Keyword tab, then <b>Subjects</b> (a.k.a. SALL, or Subject All in manual)	Skips the subject headings and goes to a long list arr. alpha by subject with secondary title sort.
Subject Heading (option 3)	Builder tab, then select <b>Subject Keywords</b> OR <b>Keyword tab (Boolean)</b> , then <b>skey [term]</b>	Searches all subject headings, but sorts by title (skey=subject keyword).
Title (option 1)	Non-Keyword tab, then <b>Title&lt;</b>	<ul style="list-style-type: none"> <li>Same as HOMER. Includes all title indexes.</li> <li>Don’t use the <b>OPAC Titles Headings Search</b>, unless you wish to search controlled titles (e.g., 130, 440, 730, 830; uniform titles or series).</li> </ul>
Title (option 2)	Builder tab, then select <b>Title Keywords</b> OR <b>Keyword tab (Boolean)</b> , then <b>tkey [term]</b>	<ul style="list-style-type: none"> <li>Searches titles, and sorts by title (tkey=title keyword).</li> </ul>

Appendix A (Search Definition Tables) in Voyager’s SysAdmin manual explains more about Voyager’s many phrase and keyword indexes. (This appendix has been placed in the Circ notebook at the RIS counter.)

## Cross References

Controlled headings searches in HOMER (i.e., Author, Subject Heading, and Prolific Author/Composer) have “See Also” buttons in the left column. The Circ module says “Reference.” To follow the Refs, select the relevant line, then click on the **Authority** button. Warning: pressing the **Do Search** button finds **ONLY** the new heading (rather than dropping you into a browse list), and you can’t back up. You *can* use the Search window’s History tab to get back, and that **WILL** drop you into a list if you select the Browse button. It is often best to simply read the cross reference, hit **Cancel** (rather than **Do Search**), then re-execute your search (or find the heading in your current list).

## Reading Records

Here are pointers to the most basic information that liaisons need once they’ve displayed a record.

Bibliographic data (brief)	First tab (Bib Brief)
Bibliographic data (complete)	Item Menu, then <b>View MARC bib</b>
Call number & location	2nd, 3rd, and 4th tabs
Circulation statistics	5th tab (Item History)
Creation or update date (of record) – very handy!	5th tab (Item History)
Statistical categories (not yet implemented)	Item Menu, then <b>Statistical Categories</b>
Status (e.g., charged, lost, cataloging review, etc.)	Item Menu, then <b>Status</b>

Note: “historical charges” and other statistics are only since 1999 and include “internal” charges (e.g., bindery). Historical browses (i.e., the number of times an item was picked up and shelved, but not charged) have not been systematically kept.

## Output

There is no way to automatically save, print, email, or otherwise export records, but there are workarounds.

- If you need to efficiently capture a lot of data, skip the Circ module. Instead, use HOMER, EndNote, or inquire about having a report written for you (reports are not yet easy to come by).
- You **CAN** copy selected fields (one at a time), but you have to know where to find highlightable data.

Information Desired	Where You Can Copy
Basic bibliographic information (except title): Author, edition, publisher, place, pub. no., series, ISSN, ISBN, system number, LCCN	Item Record display (select the Bib Brief tab)
Title	Item Menu (select “Request Maintenance”)
Call Number, location, or classification type	Item Record display (select the Item/Holdings tab)
Barcode	Item Menu (select “Notes” or “Status” or Stat. Categories)
Misc. combined fields	Item Menu (select Print Labels). See below.

- The Print Labels feature (under the Item Menu, or **Ctrl-L**) allows copying or printing. You can (crudely) configure selected fields. See Rudnick if you want to copy her configuration or if you need instruction. You can also consult the Voyager Circulation manual, Appendix B (Printing Labels), at the RIS counter. Here is a sample label:

## Key Commands

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Circulation's key commands could be more intuitive, but they are still helpful and can almost double your search speed.  
*Note: key commands may fail if there are no holdings (i.e., no barcode and library location).*

### Function Key Commands (arranged in keypad order)

- Shift-F1 – New search
- Shift-F2 – Barcode search (type in, scan, or copy and paste from another document (e.g., a lost/missing list).
- Shift-F6/F7 – Headings index (hold F6 and F7 down simultaneously)
- Ctrl-F6/F7 – Keyword index (hold F6 and F7 down simultaneously)
- Esc – get out of a window.

### Key Commands A(rranged by Function)

In the Search window (also in any menu):

Watch for underlined letters. Use these with the Alt key.

Example: Keyword means that **alt-k** will pull up the Keyword search tab.

(In menus, press Alt only for the first letter. Once you're in a Menu, the other letters work by themselves.)

Example: **alt-i v** (for item view)

Watch for true key commands listed in the menus.

Example: **Ctrl-L** brings up spine labels (which has a use!)

Within the item record display:

Use the **Tab** key (or use the Alt commands) to move from item tab to item tab.

Scrolling in results lists:

Use the **PageUp** and **PageDown** buttons. Much faster! (For long lists, grabbing the scroll bar is faster.)

To exit a window (e.g., a full bibliographic record display) so you can do your next search or redisplay your results  
**Escape** key

To search by

Headings or Keywords: **Shift-F1**. Use **Alt-s** when you're in the headings and keyword results lists.

Barcode: **Shift-F2**.

To re-display results lists:

Headings Index (**Shift-F6/F7** or right click) (hold **F6** and **F7** down simultaneously)

Keyword Index (**Ctrl-F6/F7** or right click) (hold **F6** and **F7** down simultaneously)

*Q: Why do these have two function keys? A: It's a workaround. It's too hard to keep Shift-F6 and Ctrl-F7 straight.*

To display bibliographic records

**alt-i v** (for item view) (Don't forget to press **Esc** to get out again.)

## Other Speed Tips

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Open two windows if comparing holdings in two locations (set different limits). Copy and paste the searches.

When working with barcode lists (e.g., in Missing/Lost reports), copy barcodes right into Circ (**Shift-F2** to find barcodes).

In Keyword Boolean searches, use index keys (e.g., nkey, tkey, jkey, and skey) to limit searches to specific fields. You can also use the MARC field tags followed by |a (and sometimes other appropriate subfields). This works in HOMER too.

Example: skey women and skey composers

Example: tkey spiritual? and tkey women

Example: 260b hildegard? (*Finds items published by the publisher Hildegard. The 260\b field has the publisher.*)

In Keyword Searches, try the question mark at the beginning of your word.

Example: ?bellum

## Troubleshooting

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1. **Problem: I can't get the search window OR I don't see the Item Menu at the top OR right clicking doesn't work.**  
**Solution:** Make sure the Item icon is selected at the top. (Menus and options change depending on what icon was selected.)
2. **Problem: I follow a cross reference, but then can't back up to my previous results.**  
**Response:** You indeed cannot back up. Three strategies help you deal with this. (1) Set your searches to use "Browse" mode (so you end up in a list, rather than the single followed cross reference; (2) don't follow the cross references (rather, just read them, then hit Cancel and either re-execute the search or stay in your original list; and (3) use the History. If you really must back up, use HOMER.
3. **Problem: I can't view statistics for some journals or books.**
4. **Problem: I get an error message saying "No item records for this bib[liographic record] are linked to \_\_\_ location."**  
**Response:** This message means there's no barcode or UConn information attached to the bibliographic description of the item. (Not all journals have individual barcodes with item records. Also, the bib record may be brand new, or may be an orphan.) Just click OK. You won't get stats, but you can still view the bib record. (Key commands also won't work after you hit one of these records.) Sometimes these are normal, and sometimes they are problems that ought to be reported, but that's a topic for another day.
5. **Problem: I find items in Circ that I don't find in HOMER.**  
**Response:** Either the records have been suppressed so they will not display in HOMER (for the public), or HOMER is glitching and dropping records (this is one reason why Circ searching might be preferred over HOMER). Records are suppressed when items are withdrawn (i.e., if weeded, lost, or missing). Withdrawn items say "withdrawn" in the call number field in Circ. The Circ module displays suppressed records, but one has to use the Cataloging module to suppress/unsuppress records (or even verify that they're suppressed). If HOMER is glitching and you don't want to use Circ, just quit and restart your browser.
6. **Problem: I selected a single item in a headings list, but got several undesired records. Where did they come from?**  
**Response:** Make sure you don't have other headings selected (click on them to unselect).
7. **Problem: When I tried to display an item, I got an error message saying "reserve list not found."**
8. **Problem: When I tried to display an item, I ended up in a reserve list.**  
**Response:** You probably accidentally clicked on the Reserve icon, then ran a search. The search looks the same, but it searches just the reserve lists. Start over, this time selecting the Item icon first.
9. **Problem: All the menus are grayed out. I can't even select the Item icon.**
10. **Problem: I can't open any windows (Circ seems frozen)**
11. **Problem: A display or search window is open but I can't find it.**  
**Solution:** Some windows (especially bib record displays and the search window) must be closed before you can do anything else. Close them or press Esc[ape]. Sometimes you won't realize you've got such a window in your background. (The software just seems to freeze). Try maximizing the Circ window or use the Arrange Windows command (under the Window Menu) so you can see everything. Make sure you don't have an errant window hiding under some other application's window. Also, try using alt-tab to rotate between windows on you computer to cycle through all open windows, particularly if something seems stuck.
12. **Problem: My search results keep saying "no matches found for this search," but that can't be right.**  
**Solution:** On *rare* occasion (usually after hours of non-stop searching), Circ stops working, but of course does not announce this to you. Just quit and restart the module when you catch on. (It's reliable in general.)

## Full Bibliographic Record (in MARC)

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To view the complete bibliographic record, go to the Item Menu, then select **View MARC bib** (or use **Alt-I v**). It is available in MARC format. Even if you don't read MARC, you can figure it out. Below is a MARC cheat sheet with the most common fields.

*6xx = any field in the 600s, such as 600, 650, 655, 690, etc. Distinctions don't matter here.*

1xx—Authoritative names assigned by cataloger. Found using name and author searches.

100—person (most common)

110—corporate

111—meeting name

130—uniform title (in absence of a regular author, e.g., Bible)

2xx—Title and title-related fields (20x–24x). As seen on the item. Found using title searches.

245—Proper title proper and statement of responsibility (authors, illustrators, etc. transcribed from item)

240—Uniform title (standardized title assigned if work has multiple titles or manifestations)

246—alternate titles

2xx—Edition, Imprint, etc. (250-270)

250—Edition

260—Place, publisher, date

3xx—Physical description (pagination, height, illustrations, discs, etc.)

4xx—Series info

5xx—Notes (e.g., contents, summaries, performers, “bibliography,” etc.)

6xx—Subject headings (650, or LC headings field, is most common. Found using subject heading searches.

7xx—Additional authoritative headings. Used if there's more than one name or title associated with a record (e.g., illustrators, editors, several authors, anthologies of literary works, CDs with several musical titles, etc.)

Picked up in Author and Prolific Author/Composer searches. Titles are also picked up in title keyword searches.

8xx—more series info, including linked networked resources (856)

To look up all fields, go to MARC 21 Concise Formats: <http://lcweb.loc.gov/marc/bibliographic/ecbdhome.html>

*This table will no doubt be edited by others further in the know.*

## Misc. Information

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### Limits

These are similar to those in HOMER. Here's what's different:

- When setting limits, remember to click the “retain search limits between searches” button.
- Also remember to click the “Add” button when you select a limit (it's not enough to just click on it).
- You can set more than one limit (e.g., select several library locations).
- To clear Limits, you back go into Limits to clear (it's actually displays your limits more clearly than HOMER).
- Limit by any library sublocation (e.g., Trecker Ref.). Limiting by a single library is harder (select all the sublocations).