
System Administration: Setting up a Branch Location in Voyager

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Description

This is a brief stub to cover the processes involved with setting up an (additional?) branch location in Voyager.

Hopefully, over time, other Voyager SysAdmins will flesh it out?

Overview

The main steps to this process are:

- create a circulation location
- create the physical locations
- create any sub-module groups (for each module – acquisitions, cataloguing, etc)
- create the users (this can be done at any stage)
- give Sysadmin and other users rights to work with those locations
- establish a new calendar
- setup your policies for your calendar (I wish you could checkout a copy of a calendar so you can modify your main calendar for branches!)
- setup your matrix for loan periods, etc.
- assign locations to ledgers in acquisitions

Circulation Location

We set up our Circulation location codes with an * before the name so we can quickly tell which are Circ Desk/special locations, which are suppressed in the OPAC.

Physical Locations

You may need to also consider new item types, as these formulate your loan periods for any unique cases at the new location.

Sub-Module Groups

You may want to consider restricting access rights to perform certain tasks, in which case you might want to create a sub-module group and assign your remote users to groups which can only perform certain tasks.

User Maintenance

Then of course, you will need to create and/or add your users to the relevant groups (not shown).

Grant rights to work with locations

One of the more tedious aspects is granting rights to work with certain locations.

Create new Calendar

This aspect is fairly easy.

Calendar Policies

You may find it easiest to take screenshots of other locations policies which you've already setup, and enforce the same policies, using the screenshots as a guide.

Add each Loan Matrix to Calendar

Again, you will find it easiest to take screenshots of existing matrices from other locations which you've already setup, and use the screenshots as a guide.

Add location to ledger in Acquisitions

If you will be ordering for the new location, add it to the appropriate ledger(s) in the Acquisitions client.

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