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## Overview of editing Voyager Circulation Notices and Reports

- **Product:** Voyager
  - **Relevant for Installation Type:** Multi-Tenant Direct, Dedicated-Direct, Local, TotalCare
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### Question

Overview of editing Voyager Circulation Notices and Reports that are either emailed or printed via the Voyager Reporter Client.

### Answer

For detailed instructions on editing the format of notices and reports created by the Voyager Reporter Client, see Chapter 5 of the Voyager [Reporter User's Guide](#).

This Overview discusses editing Notices in detail, and *not* Reports; However, once you feel comfortable editing the crcnotes.mdb, you have the skills needed to edit the crcrpts.mdb (and other clients' rpts.mdb files as well). Again, see Chapter 5 of the Reporter User's Guide.

All Circulation Notices are automatically generated for each library by the behind-the-scenes Circjobs that run typically each night on the server. The notices will then be either emailed or printed when Reporter is run, depending on the accuracy of information within the patron record, and the settings established within the Voyager SysAdmin Patron Rules. Be aware that the information supplied in the emailed versus the printed notices varies.

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**Note**

These Reporter created Circulation notices and reports are different from the slips and reports that print directly from the Circulation Client. For more information on editing the .ini files that control the Circulation Client produced slips and reports (such as Due Date Slips, Route Slips, on-demand Fine/Fees Statement, Reserve Pick-List, etc., please refer to: [How to edit, change or modify the Due Date Slip and other slips, printouts and receipts in Circulation.](#)

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**Circulation Notices sent by email include**

- Courtesy Due Notice
- Canceled Hold/Recall Notice
- Fines/Fees Notice
- Item Available Notice
- Overdue Item Notice
- Recall Notice
- Recall Overdue Notice
- Fine/Fee Statement Notice

Some Circulation Reports are automatically generated for each library by the Circjobs that run each night (such as Hold Shelf Expired and Transactions Exception Reports); for other Reports (such as Missing in Transit or Reserved Items Active Reports), the library may need to specifically run them via WebAdmin or a batch job on the server.

**Circulation Reports available through the Reporter client include**

- Circulation Statistics
- Distribution Item Order List
- Global Circulation Statistics
- Hold Shelf Expired
- Item Related Exceptions
- Missing In Transit
- Patron Related Exceptions
- Reserve Items Active (By Call Number)
- Reserve Items Active (By Title)
- Reserved Items Active (by Course Name & Call Number)
- Reserved Items Active (by Course Name & Title)
- Reserved Items Expired (by Call Number)
- Reserved Items Expired (by Title)
- Reserved Items Expired (by Course Name & Call Number)
- Reserved Items Expired (by Course Name & Title)
- Transactions Exceptions

## To modify one of the above notices or reports (General Best Practices)

Before you edit a file, make a backup copy and place it in another directory. If there's a problem with your edited file, you can then retrieve the original.

The file to be edited must retain the original name and remain in the original folder, otherwise the Voyager system won't recognize it.

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### Note

New data variables cannot be added to reports and notices because the input files on the server that are used to create the notices and reports only contain certain information. Libraries can modify only what is designed to appear on the report or notice.

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Within the C:\Voyager\Reporter folder, there are two files that can be edited for customized Circulation notices: circnotes.mdb (used for printed notices) and NoticeEmail.cfg (used for emailed notices).

NoticeEmail.cfg will open on your computer as a text file using the NotePad or Notepad++ program, and controls the format of emailed notices.

The circnotes.mdb will open in Microsoft Access, and controls the format of printed notices. It is recommended that only those familiar with Microsoft Access edit the circnotes.mdb.

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### Note

This overview *is not a substitute* for reading Chapter 5 of the Reporter User's Guide.

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## Edit the Emailed Notices

### THE .CFG FILES ARE COMPRISED OF SEVERAL PIECES:

- A **stanza** is a set of rules governing a specific notice.
  - Stanzas are denoted by text in brackets, for example: [C\_N\_Notice]
- A **variable** is one rule governing the format of a notice; variables are also sometimes referred to as "lines".
  - An example of a variable is:  
ID=Item ID:

When editing the .cfg file, 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. This may cause the stanza to not to work properly and may confuse your patrons or UB patrons.

Thus, from the preceding example, ID=Item ID:, you can change the Item ID:, but not the ID=.

### UNDERSTANDING EMAIL NOTICE SETUP:

Open the NoticeEmail.cfg file using either the NotePad or Notepad++ application.

The file is "divided into various sections: a Common section, and a section for each notice which can be sent by email.

The Subject line of each stanza makes it easier to tell which notice you are editing, for example C\_N\_Notice has a subject variable of "Cancellation Notice".

Each emailed notice pulls information from **both** the Common stanza and the stanza specific to that notice type.

#### Common stanza:

- "The common [stanza] contains information such as a salutation, phone number, happening desk location, and a variable called LastLine.
  - The Location is the *Circulation Happening Location* of the last circulation transaction for the item in question (this information will be auto-filled).
  - The *Location* and *ContactLoc* parameters *represent the same location field*; identification is separated for editing purposes.
  - The LastLine is printed immediately before the happening location and phone number at the end of every notice.

#### Specific Notice stanza:

- In each notice section, you find the variables FirstLine, Header1, and Header2.
  - These lines (if not blank) are printed in this order before the notice detail.
- Also, each notice section contains the variables Trailer1, Trailer2, and Trailer 3.
  - These lines are printed in this order (if not blank) after the notice detail.

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#### Note

If you want to have nothing printed for a given variable (line), then simply remove all text after the = symbol. Example:  
Phone=

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Once edits have been made to the file, make sure to save your file.

It is a good Best Practice to save a backup copy of the edited file to a different directory (or other secure location). If Voyager is reinstalled on the computer, it will overwrite the files customized saved in the C:\Voyager\ location.

### Edit the Printed Notices

When a notice is unable to be emailed, whether that is due to the patron record lacking a [valid email address](#) or the settings established within the Voyager SysAdmin Patron Rules, the notice will be able to be printed from the Voyager Reporter client.

Printed notices are controlled by the crcnote.mdb file.

The crcnote.mdb file will open in Microsoft Access, and controls the format of printed notices. It is recommended that only those familiar with Microsoft Access edit the crcnote.mdb.

Different versions of Access may differ in their functional specifics, including the user interface. The following steps may require "tweaking" for your specific version of Access.

#### EDITING PRINTED NOTICES:

1. Create a backup copy of crcnote.mdb before editing.

2. After opening crcnotes.mdb, you will see a list of the notices in the navigation taskbar.
3. Click to open the notice you would like to edit.
4. The notice should open in Report view.
  - Report view is similar to Print Preview View which we will see later, but there are differences such as the accurate estimation of the number of pages in the display and margins.
  - Report view allows you the opportunity to observe alignment, spacing, and wording.
5. To make any changes to the notice format, you will need to go to View on the home ribbon in Microsoft Access, then choose Design View.
6. In Design View, you can select fields to rearrange or edit using the standard Access commands and tools.
  1. You may edit the labels or format for an "auto-fill" data-field, but do not edit the text of a data-field itself. This may cause the field to not function properly.
  2. Labels = yes, can change. Data field = no, do not change.
  3. If you are uncertain, toggle between Design View and Print Preview to determine whether the field auto-fills with data, or functions as a label.
  4. For example, in Design view where it says "Whole Name" in the patron address section, do not change the wording for "Whole Name" as this is a data-field.
  5. You can however, rearrange this field or modify the font formatting.
  6. In another example, in the Item information, you can change the label for "Item Title:", but do not change the data field Item Title.
  7. You may *delete* a field and field label that you do not want to print on all notices of that type.
  8. You may need to change the size of a field, or the spacing between a field, to accommodate the edits that you have made.
  9. For the Courtesy Notices, and other notices, you may want to establish wording best practices.
7. After you have made your changes, check them out in Print Preview view.
8. Once edits have been made to the file, make sure to save it.
9. It is a good best practice to save a backup copy of the edited file to a different directory (or other secure location). If Voyager is reinstalled on the computer, it will overwrite the files saved in the C:\Voyager\ location.

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