

UNIVERSAL BORROWING: CHANGES IN FUNCTIONALITY IN VOYAGER 6.1

BRIEF DETAIL

In Voyager 6.1 Endeavor has more strictly defined the distinctions between call slip and Universal Borrowing requests. A call slip is a transaction in which the patron, the item, and the pick-up location are all associated with the same institution. In a Universal Borrowing (UB) transaction the item and/or the pick-up location is different from the patron's affiliation. UB transactions begin in the Universal Catalog. Call slip transactions begin in the local catalog.

I-Share libraries have traditionally made their own service decisions regarding their patrons' ability to request materials from their own library's collections (in support of closed-stack paging, commuting patrons, etc.). The ramifications of the new 6.1 functionality depend on whether you do or do not allow your own patrons to request items from your own library through your local catalog interface:

If you do not allow your patrons to request your library's items through your local catalog, the basic difference in version 6.1 is that (with the appropriate System Administration configuration) your patrons can no longer use I-Share/the Universal Catalog to circumvent (deliberately or inadvertently) this library policy.

If you do allow your patrons to request your library's items through your local catalog, the basic difference in version 6.1 is that your local catalog becomes the only place where your patrons can make these requests on their own. In other words, the local catalog is the only catalog in which "call slip" requests, strictly defined, can be submitted by users for items that belong to their own home library, and that are to be picked up at their own home library. (As in 2001.2, call slip requests can also be placed in the Circulation staff client, by staff.)

Universal Borrowing transactions (requests for other libraries' items, or requests for the patron's home library's items to be picked up at another library) are almost unchanged in Voyager 6.1. Users will continue to use I-Share/the Universal Catalog to place their requests and to designate their pick-up locations. The only change in Universal Borrowing request functionality is in the default pick-up location displayed to users on the UB request form when Voyager happens to select their home library's item to fill their UB request.

The changes in UB functionality described in this document were identified during the last days of testing the Voyager 6.1 release, prior to the beginning of the upgrade for I-Share libraries. Longer term, CARLI staff hope to develop ways to redirect users from the Universal Catalog to their local catalog automatically, where appropriate, so that users can proceed with their requests for local items without needing to start completely over. In the meantime, libraries may want to encourage their users to begin their catalog search sessions in their local catalog. Where call slip requests are allowed, users can request items immediately. Where call slip requests are not allowed, users can follow the "Repeat search in the I-Share catalog" link, and then place a Universal Borrowing request.

THE A, B, C AND D OF IT

To explain requesting scenarios we will use the following definitions:

- Call Slip A local requesting transaction in which the patron's home library, the item's owning library, and the pick-up location library are all the same institution
- Universal Borrowing A requesting transaction that always involves more than one institution

The chart below illustrates the requesting scenarios possible in Voyager 6.1. Although there are many I-Share libraries, we need to use just four libraries to illustrate all possible scenarios.

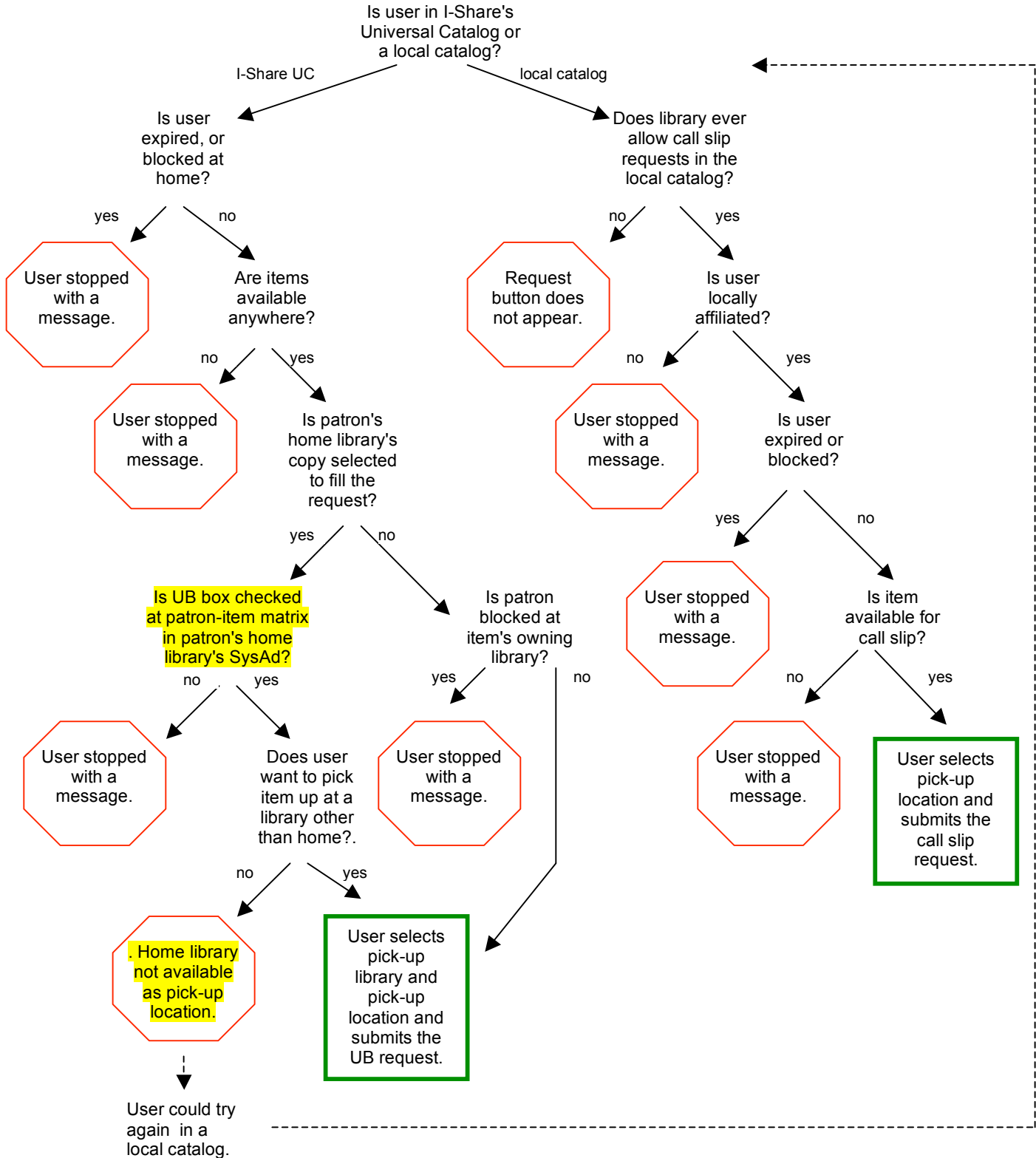
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- Patron's Home Library For purposes of the chart, always Library A
- Item's Owning Library Either the patron's home library, Library A; or another library, Library B
- Pick-up Location Library Can be the patron's home library, Library A; the item's owning library, Library A or B; or a third library, Library C
- Local Catalog Instance Can be the catalog of Library A, Library B, Library C, or even Library D (that is, the catalog of the patron's home library; the catalog of the item's owning library, if that is different; the catalog of the pick-up location library, if that is different; or even the catalog of yet another I-Share library)

The table below describes each potential requesting scenario. **Highlighted text describes functionality new to Voyager version 6.1.**

Patron's Home Library	Item's Owning Library	Pick-up Location Library	Request Scenario Works in Library A's Local Catalog?	Request Scenario Works in Library B's, C's, or D's Local Catalog?	Request Scenario Works in I-Share/the UC?
A	A	A	Yes, if call slip is allowed, patron is valid, and item is available.	No. Only locally-affiliated patrons can place call slip requests in any I-Share library's local catalog.	No. Library A is not listed as a possible pick-up location.
A	A	B	No. Only local pick-up is offered.		Yes, if patron is valid, item is available, and UB box is checked in Library A's SysAd at patron group-item type matrix.
A	B	A	No. Only local items are offered.		Yes, if patron is valid, item is available, and patron group is mapped to a UB patron group in Library B's SysAd.
A	B	B			
A	B	C			

The flowchart below is another view of the same set of concepts. It illustrates both call slip (in the local catalog) and UB (in the Universal Catalog) request logic. **Highlighting identifies functionality that is new to Voyager version 6.1.**



WHAT USERS WILL SEE

In Voyager 6.1 the I-Share UB request form will contain new instructional text at the top:

Instructions:	<p>Re-supply your borrower ID below, select a pick-up location, and press "Submit Request."</p> <p>Use this I-Share form to request materials from libraries other than your own (or, materials from your own library that you want to pick up somewhere else). To request materials from your own library and pick them up there, place your requests in your own library's catalog.</p>
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Most UB requests are ABA scenarios (patron from Library A, item from Library B, pick-up location at Library A). These scenarios are unaffected by the change in functionality in Voyager version 6.1.

The AAA and AAB scenarios that do differ from version 2001.2 will happen in the UC either when a UB-enabled user from Library A requests a title that is held by Library A alone, or when a UB-enabled user from Library A requests a title that is held by Library A among other libraries *and* Voyager randomly selects Library A to fill the request. If the user intends to pick up an item that is owned by her home library at a library other than her own, this is an AAB scenario, and still supported.

If the user wants to pick up her home library's item *at* her home library, however, she will need to place her request in her library's local catalog instead. Her home library will not appear in the drop-down list of pick-up libraries on the UB request form in the UC. CARLI has inserted the linking text "Don't see your library?" into the UB form, to help the user understand why her library name does not appear, and to explain what her options are for obtaining the item she was trying to request.

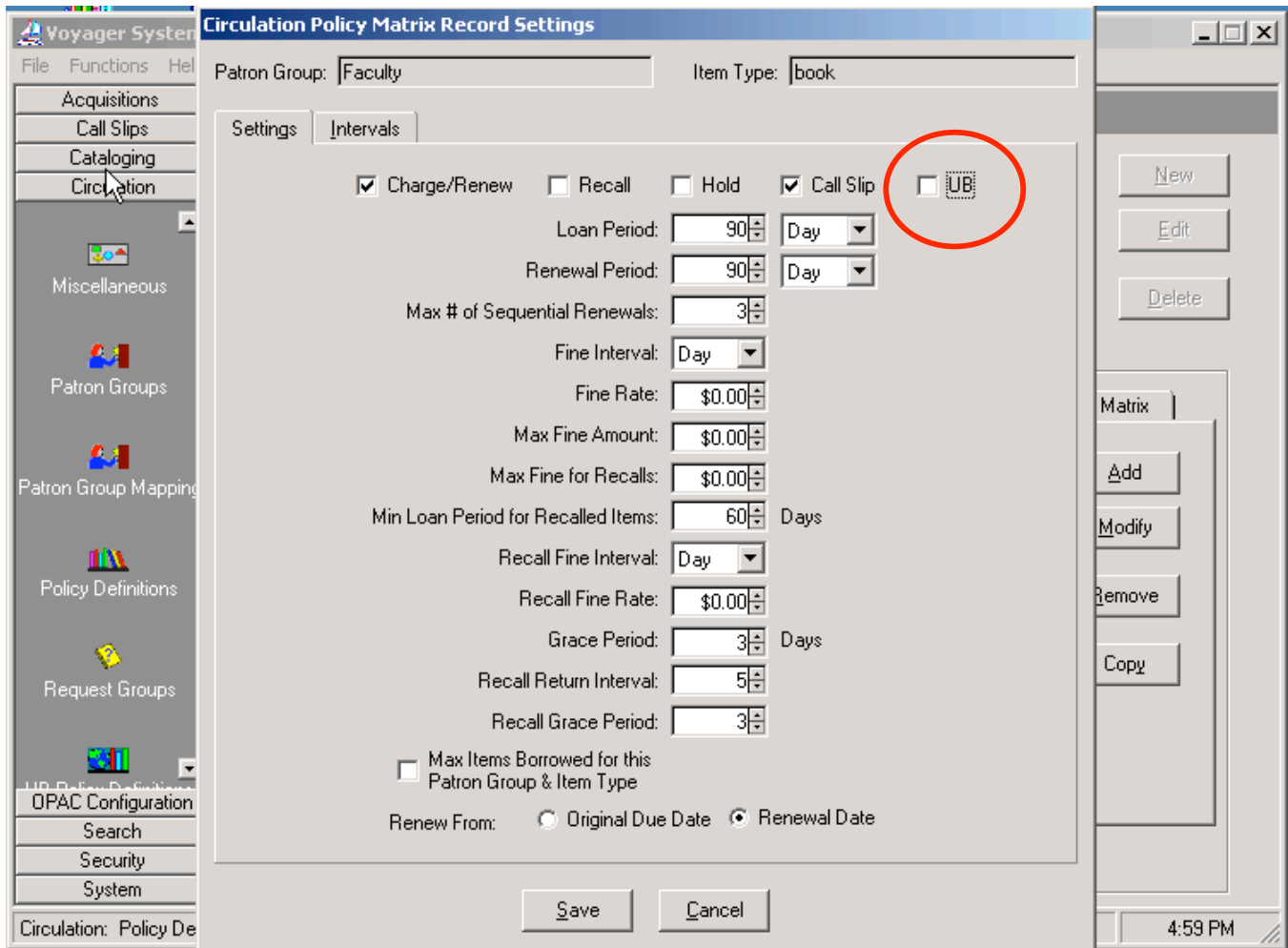
Pick-up Library: (Don't see your library?)	*Please Select Library*
Pick-up Desk or Office:	<input type="text"/>
Not Needed After:	<input type="text"/>

Note that in an ABA scenario (that is, in a scenario when Voyager selects another library's item to fill the patron's request) the patron's home library is offered as the default pick-up location, as it was in version 2001.2. Unless the user's intention is actually to pick the item up at another library, in an ABB or ABC scenario (patron from Library A, item from Library B, pick-up location at Library B or C), she won't have to change the selection in the drop-down list of libraries.

Only users in AAA and AAB scenarios will see the text "*Please Select Library*" when they get to the UB request form. If a user leaves the pick-up library selection at this setting, the call slip request will not process correctly: although the request will look to the user as if it has been accepted, when staff come to process the request they will receive a "database error" message and will need to cancel the request. Because of this potential for unprocessable call slip requests, and because it will be frustrating to users who want to pick up an item at their home library to get this far into a request and then learn they cannot proceed, some libraries may decide to disallow UB requests by their own patrons on their own items. Be aware, however, that disallowing UB requests of a library's own items by its own patrons eliminates the supported AAB scenario as well as the unsupported AAA scenario.

To disallow UB requests by local patrons for local items, open the 6.1 Voyager System Administration client and go to Circulation→Policy Definitions→Edit (for each Circulation Group)→Matrix→Modify (for each Patron Group-

Item Type combination) and uncheck the UB box in the upper right corner. This change cannot be made prior to the upgrade to 6.1. See the illustration below.



If the library has unchecked the UB box for the Patron Group-Item Type combination that applies to a user's request, and if libraries other than the patron's home library have copies available, Voyager will randomly select one of those other libraries' items to fill the request. If the UB box is unchecked and the patron's home library is the only library with an available copy, Voyager will display the "no items available" message and prevent the user from getting as far as the UB request form.



[New Search](#) [I-Share Libraries](#) [Renew Books/My Account](#) [Logout](#) [Request](#) [History](#) [Quit](#) [Help](#)

Your request failed because there are no circulating items available (or none available to patrons in your patron group) to satisfy your request.



SUMMARY OF CONSIDERATIONS FOR POSSIBLE SYSTEM ADMINISTRATION CHANGES

If the UB checkbox is CHECKED:

Advantage:

- Users are able to place requests in the AAB scenario. The AAB scenario may be especially helpful to commuters.

Drawback:

- Universal Catalog users will sometimes stumble into the AAA scenario, and not learn their request cannot be completed in the Universal Catalog until they are almost through filling out the UB request form. Users affiliated with libraries with large numbers of uniquely-held titles are the users most likely to encounter the AAA scenario.

If the UB checkbox is UNCHECKED:

Advantage:

- Users will be spared the frustration of reaching the UB request form only to discover their AAA scenario request cannot be completed in the Universal Catalog.

Drawbacks:

- Commuting users lose the opportunity to request their own library's items and pick them up somewhere else. The AAB request scenario cannot be supported in the local catalog.
- Since the UB checkbox will be checked by default in Voyager 6.1 if the "Charge/Renew" checkbox was checked in 2001.2, it may be time-consuming to uncheck the box for each Patron Group-Item Type combination in each Policy Definition Circulation Group's matrix. If CARLI staff are able, over time, to develop functionality that redirects users from the UC to the local catalog in a satisfactory way, this SysAd work would need to be reversed.