

I-Share Library Procedures for Processing ILLINET Library and Regional Library System Requests

I-Share's Universal Catalog is enabled to allow direct requesting by ILLINET and regional library system borrowers. Information and tutorials for the ILLINET and SYSTEM users, on how to use the I-Share Catalog to place requests, are available via links from within the I-Share catalog.

Procedures for I-Share Library Staff

This document is intended for I-Share library staff who are engaged in callslip operations in their libraries and who will be processing the incoming ILLINET and SYSTEM requests. Because procedures vary slightly from the routine, it is important that staff become acquainted with the instructions in this document prior to the

ILLINET and regional library system requests are processed using two Voyager clients: the Call Slip Dæmon and the Circulation client. The procedures for processing ILLINET and SYSTEM UB requests vary slightly from the normal UB routines because the items must be checked out to the requesting library prior to being sent out via ILDS.

Processing in the Call Slip Dæmon

NOTE: Call Slip procedures do not require any special logins

1. Log into the Call Slip Dæmon as your usual interlibrary loan workflow dictates.
2. Print call slips as usual.
3. Retrieve item(s) as usual. **Best Practice suggestion:** keep ILLINET-requested items (see Figure 1) separate from I-Share-requested items because of the different steps required to process ILLINET requests.

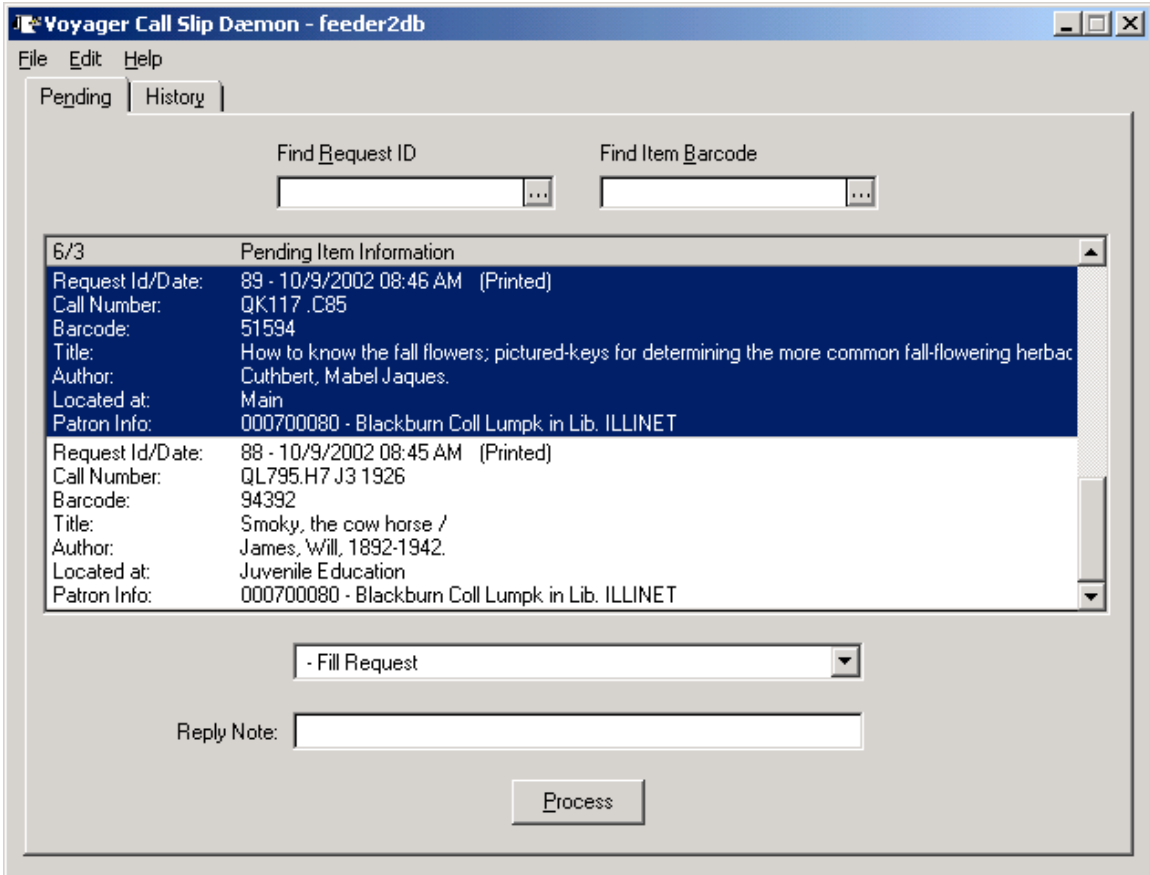


Figure 1: Screen from the Call Slip Dæmon showing an ILLINET Library request (#89 in this example). Staff can recognize ILLINET library and library system requests because the ID numbers begin with "000," and the patron last name is "ILLINET" or "SYSTEM."

- IMPORTANT:** Make note of the borrower ID number in the "Patron Info:" field. You will need this number in subsequent steps.

Fill ("Process") the request(s) as usual. A routing slip should print.

Processing in the Circulation Client

- Log into the Circulation Client as usual for routine circulation transactions.
- Before continuing to process the ILLINET-requested item(s), click on "Options" and choose "Session Preferences." Under "Printing" make sure the box for "Print Due Date Slips" is checked (See Figure 2). As long as this session is open, all charged items will now print an "Item Charged" slip. Because there are no real "Pick-up Locations" for ILLINET libraries, "Item Charged" slips need to be printed and sent with the item(s) to inform the borrowing libraries of the due date(s). Make sure the printer is ON and has paper, etc.

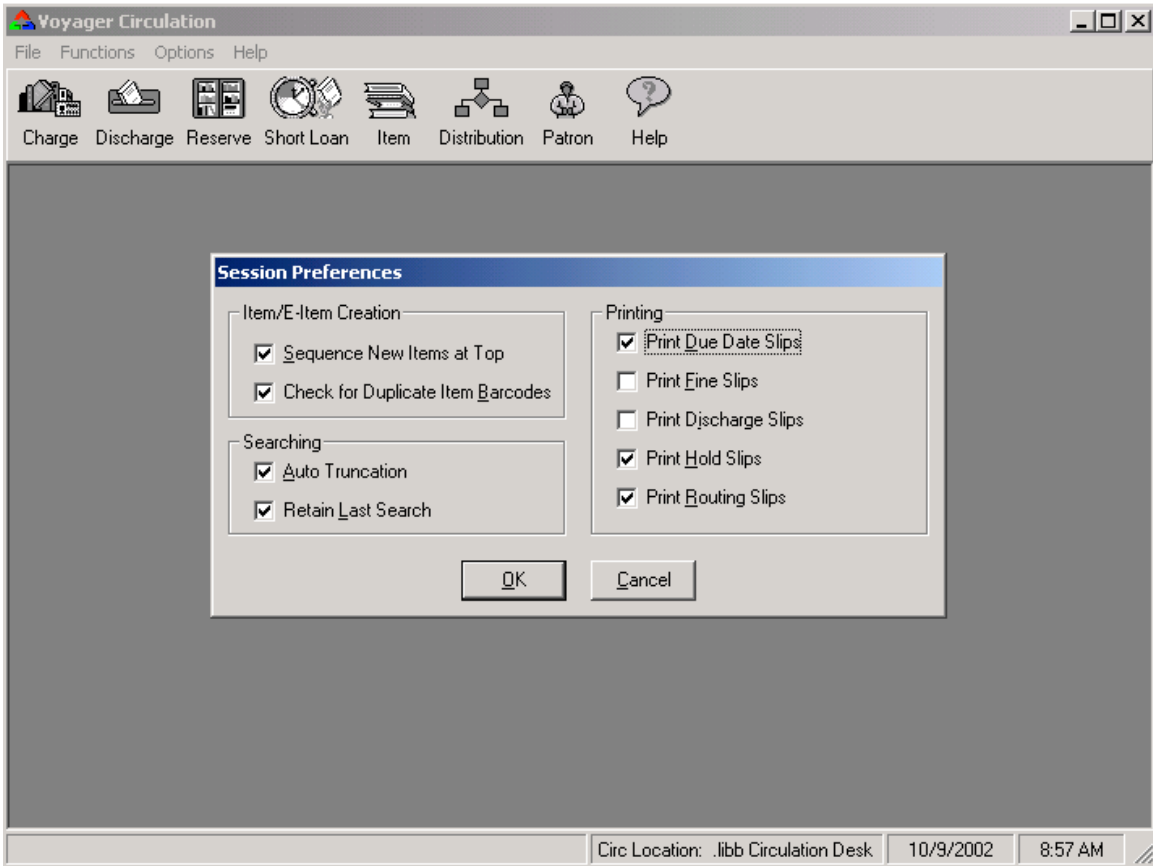


Figure 2: “Session Preferences” in the Circulation client with the “Print Due Date Slips” box checked.

7. Charge the item using the standard UB Charge workflow:
 - a) Start with the “Charge” icon
 - b) Select “ILLINET Libraries” from the pull down menu
 - c) Type in the borrower ID number you’ve saved from the CallSlip request [Step 4] and press “Enter”.
 - d) Wand in the item barcode and press “Enter”. The “Item Blocks and Information” screen will display (Figure 3), indicating that the item is in transit and will be discharged first.
 - e) Press “OK”. The item will charge and the charge slip should print.

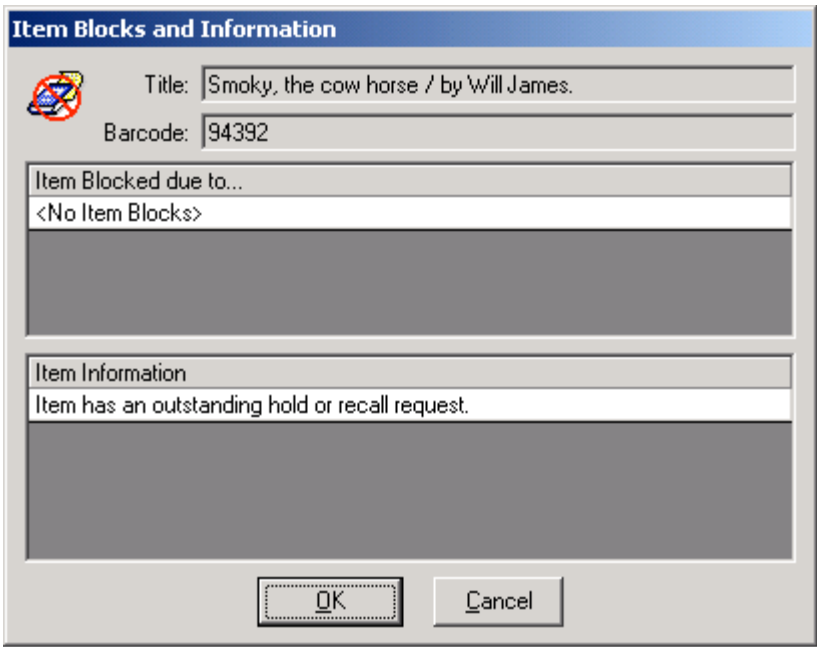


Figure 3: Item Blocks and Information pop-up window. Press "OK."

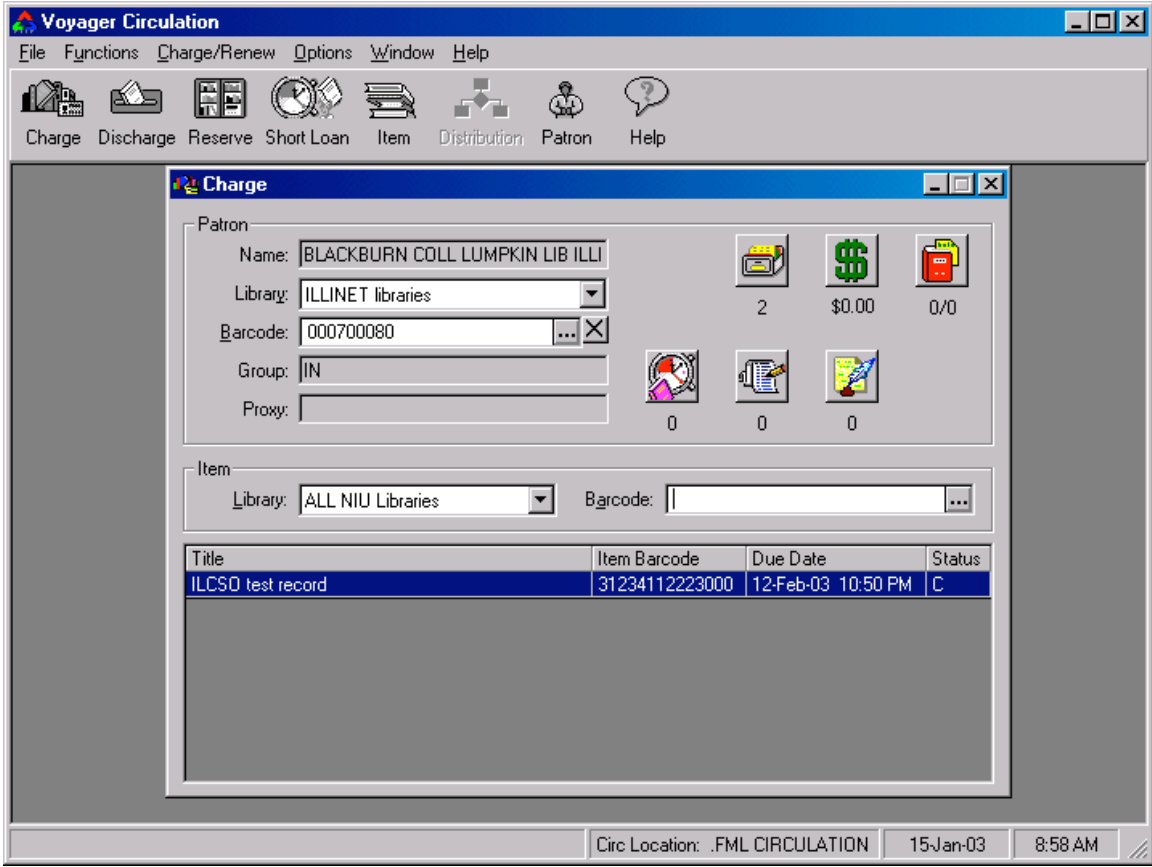


Figure 4: Voyager Circulation "Charge" screen showing an ILLINET UB charge transaction of a test item in one of the library databases.

8. As each item is charged, an "Item Charged" slip will print. Put the appropriate slip with each item, and then prepare the item for ILDS. **NOTE:** To obtain ILDS routing information it will be necessary to view the "Address/Phone" tab within the stub record that is created in your database when the ILLINET UB charge transaction is processed.
9. Optional: When you have finished processing ILLINET Library requests, go back into "Session Preferences" (see step 6) and uncheck the box for "Print Due Date Slips."
NOTE: If this box remains checked, all charges (local, ILC SO, and ILLINET) performed while logged in to this session will continue to print "Item Charged" slips.
10. When items borrowed by ILLINET and SYSTEM libraries are returned, discharge them using normal procedures.