**CARLI** | Consortium of Academic and Research Libraries in Illinois

NEWS    JOBS    EMAIL LISTS    MEMBER DIRECTORY    CONTACT

PRODUCTS & SERVICES    MEMBERSHIP    EVENTS    GOVERNANCE    ABOUT    Search

PRODUCTS & SERVICES / I-SHARE / CIRCULATION & UNIVERSAL BORROWING/INTERLIBRARY LOAN

I-Share    OVERVIEW    DOCUMENTATION    LIAISONS GUIDE    ANNUAL STATISTICS    SEARCH I-SHARE >>

# Circulation & Universal Borrowing/Interlibrary Loan

To find related documentation, look under the headers for the associated Voyager client.

expand / collapse all

## ▼ Policies & Annual Statistics

### POLICIES

→ I-Share Library Resource Sharing Code

→ I-Share Membership Agreement

Universal Borrowing Policy Standardization: Descriptions and Illustrations

→ Universal Borrowing Standardized Policy Chart

↗ ILLINET Interlibrary Loan Code

↗ Interlibrary Loan Code for the United States, for ILL with out-of-state libraries
    ↗ Interlibrary Loan Code for the United States Explanatory Supplement

→ Choosing which ILL Policy governs Lost/Damaged Fines/Fees

→ Privacy Policy

→ Fines and Fine Notice Policy

**Overview of the I-Share (UB) Resource Sharing Environment: Background, Relationships, and Processes, 8-4-2016 webinar**

Slides and Presenter's Notes

Slides 3 per page

Note: On slide 15 of the Webinar recording (slide 13 of the printed slides/notes), an example library's "alumni" patron group is shown as being mapped to the UBReg I-Share patron group; with the clarifications made to the Resource Sharing Code during the summer of 2016, alumni are no longer I-Share eligible. Contact ☐ CARLI support with any questions.

### SYSTEM STATUS

● All Systems Active: All Services Online

### POPULAR DOCUMENTATION TOPICS

→ New 2018 I-Share Participating Libraries Resources

→ Frequently Asked Questions About I-Share Next

→ News about I-Share Next

### LATEST NEWS / ALL NEWS »

**CARLI News December 19, 2017**
December 19, 2017

**CARLI to release VuFind 4.1 catalog for I-Share libraries**
December 7, 2017

**CARLI News November 29, 2017**
November 29, 2017

### WORK REQUEST ONLINE

Work Request Online (WRO) is the web-based online system that I-Share libraries use to file work requests that are processed by CARLI Data Services staff. This online service offers filing, searching

**ANNUAL STATISTICS**

➜ Annual Statistics for Individual I-Share Libraries

➜ Tips for Opening the Annual Statistics for Individual I-Share Libraries in Excel

➜ Annual Consortial Statistics for I-Share Libraries

## Resource Sharing Statistics: Navigating the Numbers, Harnessing the Data for OCLC WorldShare and ILLiad
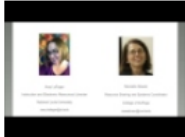


Presented 11-9-2016 by Amy LeFager and Marcella Nowak, co-chairs of the FY17 CARLI Resource Sharing Committee
📄 Slides and Presenter Notes
📄 Slides 3 per page

## Resource Sharing Statistics: Navigating the Numbers, Harnessing the Data for I-Share
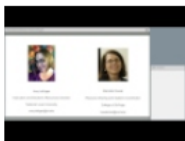


Presented 10-26-2016 by Amy LeFager and Marcella Nowak, co-chairs of the FY17 CARLI Resource Sharing Committee
📄 Slides and Presenter Notes
📄 Slides 3 per page

## ▼ Call Slip

➜ I-Share Best Practices: How to Use the Call Slip Client

➜ I-Share Best Practices: Processing ILLINET Requests

➜ I-Share Sample Workflow: Processing I-Share Items

➜ Sample Workflows for OCLC Lending: Examples of lending library workflows for recording OCLC loans in an ILS.

➜ Question: I-Share materials on course reserves

➜ Known Issue: Patron name did not print on Hold slip

➜ Known Issue: Call slip filled by staff override

➜ Known Issue: "Unable to delete bibliographic record. An outstanding hold/recall exists."

➜ I-Share Best Practices: Call Slip Processing When Library is Closed

➜ Local Call Slips: Considerations, Instructions, & FAQ

➜ How To: When You Have To Charge before You Send: How To Deliver I-Share Materials via Mail, or via Service Points with No Access to Voyager Circulation

➜ Voyager 9.1.1 Consortial Callslip.ini: Overview and Installation

📄 Voyager System Administration for I-Share Libraries: Part 4: Call Slips

➜ Voyager System Administration for I-Share Libraries: Call Slip Item Required

requests.

- File a Work Request »
- How to use the Work Request Online »

**Overview of the I-Share (UB) Resource Sharing Environment: Background, Relationships, and Processes, 8-4-2016 webinar**



📄 Slides and Presenter's Notes

📄 Slides 3 per page

Note: On slide 15 of the Webinar recording (slide 13 of the printed slides/notes), an example library's "alumni" patron group is shown as being mapped to the UBReg I-Share patron group; with the clarifications made to the Resource Sharing Code during the summer of 2016, alumni are no longer I-Share eligible. Contact ☐ CARLI support with any questions.

## ▼ Circulation: Configuration & Preferences

➜ Voyager Circulation Training Video Series (in development)

➜ Circulation Session Preferences

➜ How to access the Voyager Training Databases

➜ Voyager Bib Templates: Circbib.cfg & Acqbib.cfg

➜ How Circulation System Administration Values are Used During a Checkout

📄 Setup for Voyager SIP2 Connections

📄 Voyager System Administration for I-Share Libraries: Part 3: Circulation and Universal Borrowing

➜ Adding a Location in Voyager SysAdmin

➜ Creating a Display Location/New Book Location at your Library

📄 I-Share Universal Borrowing Perspectives: WebVoyage and VuFind

➜ Links from SILC to I-Share

## ▼ Circulation: Processes & Transactions

➜ Voyager Circulation Training Video Series (in development)

➜ I-Share Barcode Formats

➜ I-Share Best Practices: Damaged Items

➜ I-Share Best Practices: LOST Item Procedure (updated 10/7/2015)

    ➜ Lost Items Discharged Today Report

➜ Choosing which ILL Policy governs Lost/Damaged Fines/Fees

➜ How To: Print one due date slip per session

➜ How To: Modify Due Date Functionality

➜ How To: Backdate a discharge transaction

➜ How To: Add Item Statuses Manually

➜ I-Share Best Practices: Placing Recalls

➔ I-Share Best Practices: Hold Shelf Maintenance

➔ I-Share Best Practices: Using Voyager's Offline Backup Circ (OBC)

➔ How To: Manage Old "In Transit-Discharged" or "In Transit-On Hold" Item Statuses

➔ How-To: Removing Item Temporary Locations and Temporary Item Types from Reserves Items

➔ How-To: Access the Voyager Training Databases

➔ Known Issue: Items listed as "Off" reserve in a reserve list show in the OPAC

➔ Known Issue: "Loan Shortened Due To Patron Expiration Alert" does not display for UB (I-Share) patrons

➔ Known Issue: Local charge/discharge note displays for UB items

➔ Known Issue: Patron Pop-up note is blank if discharged item also has a Discharge note

➔ Known Issue: Patron name did not print on Hold slip

➔ Known Issue: "Unable to delete bibliographic record. An outstanding hold/recall exists."

**Overview of the I-Share (UB) Resource Sharing Environment: Background, Relationships, and Processes, 8-4-2016 webinar**



📄 Slides and Presenter's Notes

📄 Slides 3 per page

Note: On slide 15 of the Webinar recording (slide 13 of the printed slides/notes), an example library's "alumni" patron group is shown as being mapped to the UBReg I-Share patron group; with the clarifications made to the Resource Sharing Code during the summer of 2016, alumni are no longer I-Share eligible. Contact ▢CARLI support with any questions.

▼ **Circulation: Patron Records**

➔ Voyager Circulation Training Video Series (in development)

➔ I-Share Barcode Formats

➔ Batch Loading Patron Data in Voyager (aka Patron Load, Batch Load, Patron Batch Load)

➔ I-Share Best Practices: Blocking and Expiring Patron Records

➔ How-To: Delete Patron Records That Are Affiliated with Proxy Patrons

📄 I-Share Best Practices: Voyager Patron Record Purge
CARLI strongly recommends that libraries take advantage of the Voyager Patron Purge program, which you may request via Work Request Online (WRO), to eliminate old data for patrons who are no longer associated with your institutions. Eliminating obsolete patron data helps protect privacy of former students and employees. Additionally, eliminating expired records will be a useful first step if your library also needs to perform additional maintenance (e.g., patrons with multiple active barcodes).

## Circulation: Notices

➜ Editing Notice Templates in Voyager

➜ Sending Voyager Notices via E-mail: Options for I-Share Libraries

➜ Circulation Notices: Who Is Receiving Which Circulation Notices, and How?

➜ Library Addresses in Voyager: When and How They Appear

➜ I-Share Best Practices: Library Notice Distribution

➜ I-Share Best Practices: Recommended Notice Text

➜ Requests and Promotes that could not be filled by an I-Share library (aka Dead Requests)

## Circulation: Pick & Scan

Voyager's Pick and Scan functionality is useful for libraries to make one or more changes to item records, their associated holdings, and/or associated bib records in a single process.

Using Pick and Scan

Pick and Scan generates log files for both its "preview" and "production" modes, which libraries can use to review the changes that will be made/were made to the records. Logs can be saved directly to your computer via Pick and Scan functionality, or downloaded the next day from your library's CARLI FTP directory after uploaded by CARLI overnight. Review the "PASLog" file type from the " ➜ What's in my FTP Directory" documentation.

The documentation below provides directions for using a set of Excel Macros (NOT MACRO EXPRESS) to convert the Pick and Scan logs from the original vertical format (with the details about a single item listed in separate rows), to a horizontal format (where each item is listed in a single row, with columns containing the item details).

Directions for Converting Pick and Scan logs using Excel Macros

(PSLConvertPickAndScanLogMacros.txt) Excel Macros for Converting Pick and Scan logs: see "Directions" linked directly above.

## Circulation: Reserves

➜ I-Share Best Practices: Reserves Setup and Workflow

➜ How-To: Removing Item Temporary Locations and Temporary Item Types from Reserves Items

➜ Question: I-Share materials on course reserves

➜ Known Issue: Items listed as "Off" reserve in a reserve list show in the OPAC

## Circulation: Cleanup & Maintenance Reports

Best Practices for Patron Record Purge

CARLI strongly recommends that libraries take advantage of the Voyager Patron Purge program, which you may request via Work Request Online (WRO), to eliminate old data for patrons who are no longer associated with your institutions. Eliminating obsolete patron data helps protect privacy of former students and employees. Additionally, eliminating expired records will be a useful first step if your library also needs to perform additional maintenance (e.g., patrons with multiple active barcodes).

- Reports that may be helpful for patron purge preparation:
  - → Web Reports: "Expired Patron Records" – Shows all expired records, including UB patrons
  - Shared SQL and CARLI Reports 2016a: → "Expired Patron Records for Deletion" – Shows only a library's own patrons; UB patrons excluded.

→ Blocked Patrons Monthly Report

→ Dead Requests Report

→ Fines of $4.99 or less: Monthly Cleanup Report

→ Lost Items Discharged Today Report

## ▼ Other Resource Sharing & Interlibrary Loan

→ I-Share Sample Workflow: Processing I-Share Items for Resource Sharing

→ Sample Workflows for OCLC Lending: Examples of lending library workflows for recording OCLC loans in an ILS.

→ Choosing which ILL Policy governs Lost/Damaged Fines/Fees

→ I-Share Best Practices: Monograph ILL

→ Question: I-Share materials on course reserves

## ▼ Reporter

→ Voyager Reporter Client: Instructions & FAQ

→ Sending Voyager Notices via E-mail: Options for I-Share Libraries

→ Troubleshooting- Reporter: Fix for the Utility.mda error
→ Troubleshooting- Reporter: Fix for Voyager Reporter Client hangs at login ("Testing connection to email server" message).
→ Troubleshooting- Reporter: Fix for Voyager Reporter Client not generating Circulation Notices.

## ▼ ShelfLister

→ ShelfLister: Introduction and FAQ

## ▼ Past Events and Webinars

### EVENTS, WEBINARS, AND DOCUMENTATION THAT ARE NOT I-SHARE SPECIFIC

→ CARLI's Resource Sharing Resources that are not I-Share Specific

### RESOURCE SHARING STATISTICS: NAVIGATING THE NUMBERS, HARNESSING THE DATA FOR OCLC WORLDSHARE AND ILLIAD



Presented 11-9-2016 by Amy LeFager and Marcella Nowak, co-chairs of the FY17 CARLI Resource Sharing Committee
📄 Slides and Presenter Notes
📄 Slides 3 per page

## OVERVIEW OF THE I-SHARE (UB) RESOURCE SHARING ENVIRONMENT: BACKGROUND, RELATIONSHIPS, AND PROCESSES, 8-4-2016 WEBINAR



📄 Slides and Presenter's Notes

📄 Slides 3 per page

Note: On slide 15 of the Webinar recording (slide 13 of the printed slides/notes), an example library's "alumni" patron group is shown as being mapped to the UBReg I-Share patron group; with the clarifications made to the Resource Sharing Code during the summer of 2016, alumni are no longer I-Share eligible. Contact ☐ CARLI support with any questions.

## RESOURCE SHARING FORUM, 6-6-2013 @ IVCC

📄 Agenda

Morning panel discussion:

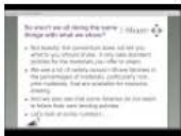📄 Tracking "Not Charged Items"- Kyle Onley & Sandy Harris, ONU

📄 Using Voyager Reports- Amanda Pippitt, MIL

## VOYAGER CIRCULATION CLIENT TRAINING

➔ Voyager Circulation Training Video Series (in development)

## I-SHARE NON-PRINT RESOURCE SHARING WEBINAR



Are you wondering if your library is "typical" in the amount of non-print that can be borrowed by other I-Share libraries' patrons?  Have you not given your non-print policies much thought in a long time? We've been looking at the numbers and percentages of non-print materials available for I-Share resource sharing and would like to share some of what we've learned with you.

In this webinar, we'll review some statistics using reports for an anonymous example library. You may want to look at your own versions of these reports before the webinar, and possibly even have a copy handy during the session. Specifically, we recommend you look at recent versions of your library's Circ Stat 10 and Circ Stat 8. These reports are available in your library's I-Share FTP directory and are described in detail on the ➔ I-Share Annual Statistics Package web page. Your I-Share liaison has access to your FTP directory.

# CARLI email lists of interest for circulation/resource sharing
https://www.carli.illinois.edu/email-lists

To subscribe to any of the CARLI email lists included below, follow the link and provide information requested on the web form. After you have submitted your form, you will be sent an email requesting confirmation in order to complete the subscription process. This confirmation prevents others from gratuitously subscribing you to any CARLI email lists. Subscription to these email lists are open to staff at CARLI member institutions. There is no limit to the number of people from any one institution that may subscribe.

- **Announce** https://carli.illinois.edu/mailman/listinfo/announce/
  General CARLI announcements. Subscribers to this email list will receive announcements and critical updates from CARLI but may not post to the list.
- **I-Share Announcement** https://carli.illinois.edu/mailman/listinfo/i-share
  General I-Share announcements. Subscribers to this email list will receive announcements and critical updates from CARLI but may not post to the list.
- **Assessment Interest Group** https://carli.illinois.edu/cgi-bin/mailman/listinfo/assessment-ig
  The Assessment Interest Group (assessment-ig) email list is for people interested in sharing information about assessment and evaluation topics in libraries. Anyone subscribed to this list may post to the list.
- **CARLI Collections & Content Group (CCG)** https://carli.illinois.edu/mailman/listinfo/ccg
  The CARLI Collections and Content Group (ccg) email list provides a forum for communication among collection development librarians, subject bibliographers, library administrators and others interested in matters relating to collections, collection development, and collection management within CARLI. Anyone subscribed to this list may post to the list.
- **ILDS** https://carli.illinois.edu/mailman/listinfo/ilds
  This list is CARLI's primary means for sending ILDS service announcements and other critical information to ILDS sites. CARLI requires that at least one person from each participating ILDS library is subscribed to this list at all times to serve as the primary contact for all operational information. The ILDS site contacts provided by each library are subscribed automatically to the ILDS list to ensure that they (and thereby their libraries) receive all CARLI announcements. Subscribers to this email list will receive announcements and critical updates from CARLI but may not post to the list.
- **ILDS Interest Group** https://carli.illinois.edu/mailman/listinfo/ilds-ig
  The ILDS-ig list provides an open forum for ILDS users to discuss the system, and facilitates conversations among the libraries that participate in ILDS. Library staff are encouraged to share best practice tips on processing materials for delivery, to ask questions of their ILDS colleagues, and to assist in the effort to redistribute delivery bags when and where they are needed. Participation in ILDS-ig email list is completely voluntary and all library staff is welcome to join. Anyone subscribed to the ILDS-ig list may post to the list.
- **Public Services Interest Group** https://carli.illinois.edu/mailman/listinfo/pubserv-ig
  The CARLI Public Services Interest Group (PubServ-ig) list is a forum for academic librarians in Illinois focusing on issues related to all aspects of public service operations. More specifically, its goal is to support public services through the collaborative exploration of relevant topics, trends and challenges, as well as through the development and coordination of activities beneficial to the CARLI community. Anyone subscribed to this list may post to the list
- **Reports Interest Group** https://carli.illinois.edu/mailman/listinfo/rpt-ig
  Subscription is open to staff at I-Share libraries who are interested in sharing information or asking questions about using Voyager reports in the I-Share environment. Anyone subscribed to this list may post to the list.
- **Resource Sharing Interest Group** https://carli.illinois.edu/mailman/listinfo/resshare-ig
  Subscription is open to anyone interested in Resource Sharing who would like to ask questions, to share information or strategies with their CARLI colleagues. Anyone subscribed to this list may post to the list.