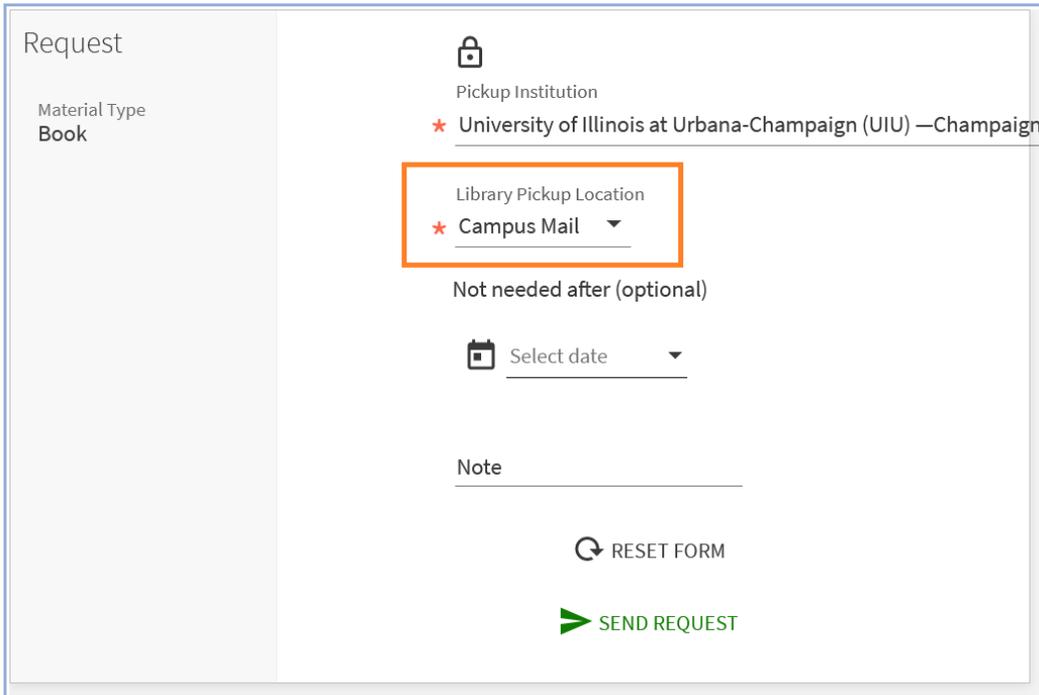


Campus Mail

Documentation by Rand Hartsell and Kristen Zidon, University of Illinois – Urbana-Champaign

Patrons can choose Campus Mail as a “Library Pickup Location” when submitting a request in Primo.



The screenshot shows a web form for submitting a request. On the left, there is a sidebar with the text 'Request' and 'Material Type Book'. The main form area contains the following elements: a lock icon and the text 'Pickup Institution' followed by '★ University of Illinois at Urbana-Champaign (UIU) —Champaign'; a dropdown menu labeled 'Library Pickup Location' with '★ Campus Mail' selected and highlighted by an orange box; the text 'Not needed after (optional)'; a calendar icon and the text 'Select date' with a dropdown arrow; a 'Note' field; a 'RESET FORM' button with a circular arrow icon; and a 'SEND REQUEST' button with a green arrow icon.

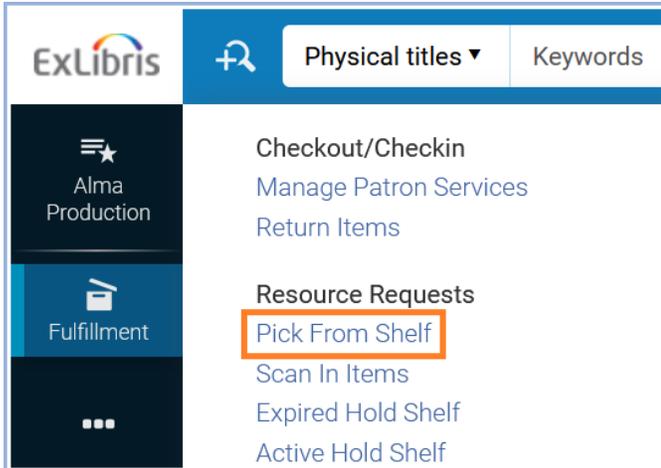
Processing items for delivery through Campus Mail using Alma should seem familiar to staff who have used Voyager. A Campus Mail request is handled much like any other request in the Pick From Shelf list.

Basic Steps:

- Print the Pick Slip from the Pick From Shelf list.
- Retrieve the item.
- On the Scan In Items screen, select "Automatically print slip" and "Register in-house use".
- Scan the item's barcode. Cancel the Transit Slip print.
- Copy the Requester ID. Look up the patron from the Manage Patron Services screen.
- Check the User Notes for any notes about a Campus Mail address to use.
- To get the patron's library barcode to use in Mailing Slip NET:
 - Click the link next to "ID" in the patron information box to get to the User Details screen.
 - Copy the barcode.
 - Click < next to "User Details" to return to the previous screen.
- Check out the item to the patron.
- Write the due date on the item's due date slip.
- **Click Done** in Alma so that the patron gets a notification email.
- Print the Mailing Slip using Mailing Slip NET.
 - If the patron had a Campus Mail address in their User Notes, use that.
 - Otherwise, enter the patron barcode and item barcode.
- Put the Mailing Slip in the item.
- When bagging the item, tape the Mailing Slip to the front of the bag. Remove and shred any other paperwork with patron information that was in the item.

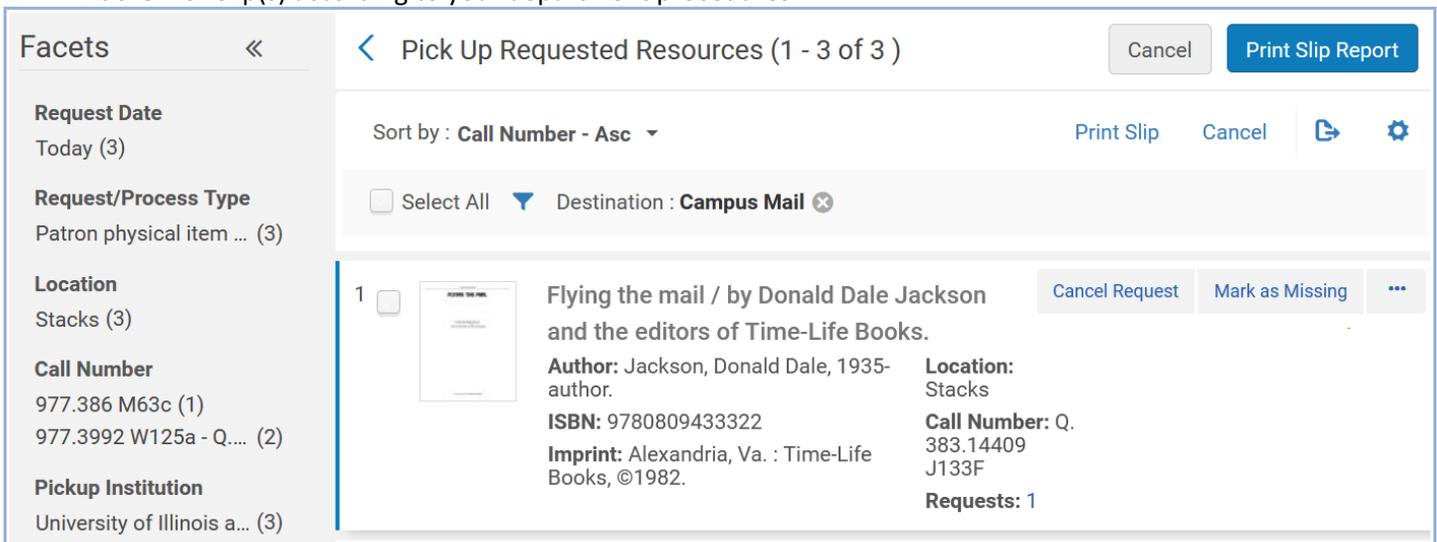
Detailed Workflow:

1. Go to the Pick From Shelf list from the Fulfillment menu.



The screenshot shows the ExLibris interface. On the left is a navigation sidebar with 'Alma Production' and 'Fulfillment' sections. The 'Fulfillment' section is active, showing a list of options: 'Checkout/Checkin', 'Manage Patron Services', 'Return Items', 'Resource Requests', 'Pick From Shelf' (highlighted with an orange box), 'Scan In Items', 'Expired Hold Shelf', and 'Active Hold Shelf'. At the top, there are tabs for 'Physical titles' and 'Keywords'.

2. Print the Pick Slip(s) according to your department procedures.



The screenshot displays the 'Pick Up Requested Resources (1 - 3 of 3)' page. On the left is a 'Facets' sidebar with categories: 'Request Date' (Today (3)), 'Request/Process Type' (Patron physical item ... (3)), 'Location' (Stacks (3)), 'Call Number' (977.386 M63c (1), 977.3992 W125a - Q.... (2)), and 'Pickup Institution' (University of Illinois a... (3)). The main area shows a list of resources. The first item is 'Flying the mail / by Donald Dale Jackson and the editors of Time-Life Books.' with a checkbox '1' and a book cover thumbnail. Below the title are details: 'Author: Jackson, Donald Dale, 1935-author.', 'ISBN: 9780809433322', 'Imprint: Alexandria, Va. : Time-Life Books, ©1982.', 'Location: Stacks', 'Call Number: Q. 383.14409 J133F', and 'Requests: 1'. Action buttons include 'Cancel Request', 'Mark as Missing', and a gear icon. At the top right are 'Cancel' and 'Print Slip Report' buttons. The 'Sort by' is 'Call Number - Asc' and the 'Destination' is 'Campus Mail'.

Note: To only see Campus Mail slips, select "Campus Mail" from the "Destination" section of the Facets sidebar. To remove a facet, click the circled "x" to the right of the facet name at the top of the list of requests.

- Some things to note about the printed Pick Slip:
 The Item Barcode may or may not appear.
 The Destination is Campus Mail.
 The Request ID can be used to look up the request in Alma if needed.
 The patron's ID may not appear in full.

Location: Main Stacks - Stacks

Call Number: Q. 383.14409 J133F

Item Barcode:



Flying the mail /
 By: Jackson, Donald Dale,
 Material Type: BOOK
 Inventory Material Type: Book

Requested For: SS

Destination: Campus Mail

Request Type: Patron physical item request

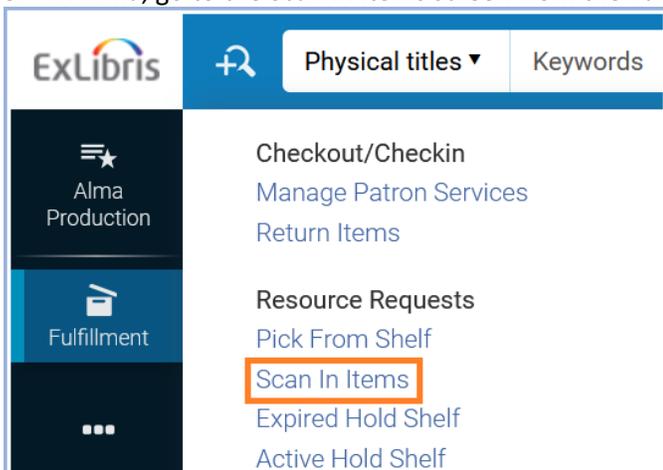
Request ID: 17610818900005899

Patron ID at Item's Institution:





- Take the printed Pick Slip to the shelf to retrieve the item.
- In Alma, go to the Scan In Items screen from the Fulfillment menu.



ExLibris

Physical titles ▾ Keywords

Alma Production

Fulfillment

- Checkout/Checkin
- Manage Patron Services
- Return Items
- Resource Requests
- Pick From Shelf
- Scan In Items**
- Expired Hold Shelf
- Active Hold Shelf

6. On the Scan In Items screen, make sure to select “Yes” for “Automatically print slip” and check the box for “Register in-house use”. Then scan the item’s barcode.

Scan In Items

Manage In Process Items Exit

Scan in Items Change Item Information

Automatically print slip Yes No

Register in-house use

Work Order Type

Scan item barcode * Create Item

Scan request ID

7. This brings up a print preview screen for a Transit Slip to route the item to the “location” of Campus Mail. This slip is unnecessary, so click “Cancel”.

To: Campus Mail

Item Barcode:

3 0 1 1 2 0 3 1 8 9 5 9 9 5

Flying the mail /
By: Jackson, Donald Dale,
Owning Library: Main Stacks
CARLI
I-Share

Print 1 sheet of paper

Destination EPSON TM-T88IV Rec

Pages All

Copies 1

Layout Portrait

Color Black and white

More settings

Print Cancel

Note: If the item came from an I-Share institution, the Transit Slip will say the name of that institution instead of “Campus Mail”. This is expected behavior and can be ignored.

8. The Scan In Items screen will show information about the item and the patron. Copy the Requester ID to use for looking up the patron.

Scan In Items

Clear List Manage In Process Items Exit

Automatically print slip Yes No

Register in-house use

Work Order Type

Scan item barcode *

Scan request ID

1 - 1 of 1

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checker In
1 Flying the mail / by Donald Dale Jackson and the editors of Time-Life Books.	Campus Mail	30112031895995	⚠ Patron physical item request	Fish, Stackles	stackles@illinois.edu	1	...

9. Go to the Manage Patron Services screen from the Fulfillment menu.

ExLibris

Physical titles Keywords

Alma Production

Fulfillment

- Checkout/Checkin
- Manage Patron Services**
- Return Items
- Resource Requests
- Pick From Shelf
- Scan In Items
- Expired Hold Shelf
- Active Hold Shelf

10. Use the copied Requester ID to look up the patron.

Patron Identification

Go to Return Items Register New User

Find user in other institution

Scan patron's ID or search for patron *

Use proxy

- Check the User Notes field to see if the patron has a Campus Mail address listed there. If so, use that when mailing the item.
- If you'll be using Mailing Slip NET to print the address label, and there's no Campus Mail address in the User Notes, then you'll need the patron's library barcode. To get that, click the ID in the patron information box (the text of this link should be the same as the Requester ID you copied earlier). The patron information box may be at the top of the page or on the right side, depending on the size of your browser window.

Patron Services

Active balance **0.00 USD**

ID **stackles@illinois.edu**

User group **SUPT STAFF**

User Notes

1. This is a dummy patron record--contact Circulation at 333-8400.

Loans Returns Requests Network Activity

- This link takes you to the Identifiers tab on the User Details screen. Copy the library barcode (which starts with 2011...). Then click the left-pointing angle/arrow (<) next to "User Details" to go back to the Patron Services screen. (The Cancel or Save button would also work.)

User Details

Toggle Account Type Cancel Save

Fish, Stackles

ID **stackles@il...** Account Type **Internal** Identity Service **Not Used**

Record type **Public** User group **SUPT STAFF**

General Information Contact Information Identifiers Notes Blocks Fines/Fees Statistics Attachments

Proxy For History

1 - 1 of 1

Active	ID Type	Value	Note	Created By	Creation Date
1 <input checked="" type="checkbox"/>	Netid (Scoped - includes domain)	20112000326602	Added by script on 2020-07-17 17:18...	exl_api	07/17/2020 17:18:10 CDT

14. Check out the item by scanning it into the “Scan item barcode” field. Write the due date on the item’s due date slip.

The screenshot shows the 'Patron Services' interface for a user named 'Fish, Stackles'. The user's active balance is 0.00 USD, ID is stackles@illinois.edu, and user group is SUPT STAFF. There are buttons for 'Add/Renew Patron Role', 'Edit User Info', 'Submit Request', 'Refresh Blocks/Notes', and 'Done'. The 'User Notes' section contains a note: '1. This is a dummy patron record--contact Circulation at 333-8400.' Below this are tabs for 'Loans', 'Returns', 'Requests', and 'Network Activity'. At the bottom, there is a 'Scan item barcode' field with the value '30112031895995' and an 'OK' button. The 'Create Item' button is also visible.

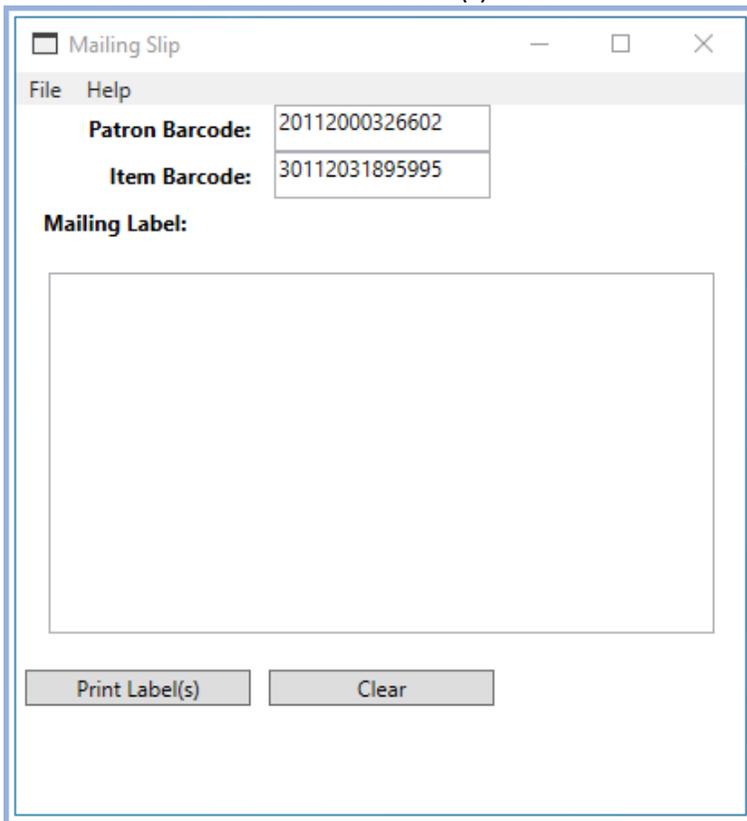
15. Then click the Done button to send the patron a notification email.

The screenshot shows the 'Patron Services' interface for the same user. The 'Done' button in the top right corner is highlighted with an orange box, and a large orange arrow points to it. The 'Scan item barcode' field now contains 'Look-up or select'. Below the barcode field, it shows '1 - 1 of 1' and 'Change Due Date' with a refresh icon. The 'Loan Display' is set to 'Loans of this session'. A table of loans is displayed below.

Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	L N
1 <input type="checkbox"/> Flying the mail / by Donald Dale Jackson and the editors of Time-Life Books.	09/17/2021 18:00:00 CDT	30112031895995	-	08/20/2021	Normal	BOOK 16/4 WKS	Main Stacks	...

Note: If you prefer, you can check the item out to the patron first and get the patron’s library barcode after that. Either way, make sure to click the Done button on the Patron Services screen when you’re finished.

16. Open Mailing Slip NET. Paste the patron's library barcode in the Patron Barcode field, and then scan the item's barcode in the Item Barcode field. If the label doesn't automatically print, click the Print Label(s) button.
- Note:** If there was a Campus Mail address given in the patron's User Notes, use that instead of entering the barcodes. Enter the patron's name and address into the large Mailing Label field. Skip a line and scan in the item barcode. Then click the Print Label(s) button.



The screenshot shows a window titled "Mailing Slip" with a menu bar containing "File" and "Help". Below the menu bar, there are two input fields: "Patron Barcode:" with the value "20112000326602" and "Item Barcode:" with the value "30112031895995". Below these fields is a large, empty text area labeled "Mailing Label:". At the bottom of the window, there are two buttons: "Print Label(s)" and "Clear".

17. Put the printed Mailing Slip in the item.
18. When bagging Campus Mail, remove all paperwork from the item. Tape the Mailing Slip to the front of the bag, and shred any other slips or paperwork with patron information. Don't send paperwork inside the bag that might identify the patron.