THE I-SHARE RESOURCE SHARING ENVIRONMENT: RELATIONSHIPS AND PROCESSES

February 2018

1

- Initial terminology
  - Universal Borrowing (UB)
  - I-Share

- Documentation on initial terminology
  - Ex Libris Voyager Universal Borrowing (UB) User's Guide: https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_Universal_Borrowing_2014.pdf
  - I-Share Overview: https://www.carli.illinois.edu/products-services/i-share
  - I-Share Agreement https://www.carli.illinois.edu/membership/ishareagree
  - I-Share Resource Sharing Code: https://www.carli.illinois.edu/products-services/i-share/circ/I-ShareResourceSharingCode

■Overview of resource sharing between I-Share libraries.

■We'll cover:

- ■ Background
- ■ UB Integration and patron group mapping
- ■ Request promotion
- ■ Call Slip Daemon
- ■ Request processing
- ■ Final Q & A

REQUESTING COMPONENTS

People

- Library Staff
    - perform collection development and maintenance
    - assist patrons in using I-Share
    - determine local policies
    - agree to abide by consortial policies
    - process requests in Voyager clients
    - prepare materials for shipment; receive delivery
- Patrons
    - initiate requests in the OPAC
- CARLI Staff
    - support Voyager (and in the future, "I-Share Next")
    - assist libraries
    - enforce consortial policies

Materials

- Library staff determine which items can be borrowed/lent
  - Non-circulating/Library use only
  - Request exempt- in person charge
  - Locally requestable (local call slip)
  - UB requestable (UB call slip)

- (Packaging materials needed for delivery are a different topic.)

- **OPAC (Online Public Access Catalog)**
  - patrons place requests and check account status
- **Voyager**
  - Universal Borrowing (UB)
    - software framework that connects the I-Share libraries' databases
  - Call Slip Daemon (client)
    - library staff review and process patron requests

Voyager continued

- Circulation Client
    - library staff check out/discharge requested material
    - library staff can place call slips, holds, and recalls for local patrons for local items (if enabled).
- System Administration
    - where the settings are entered to make the system work
    - library staff determine local policies
    - consortial policies are entered and maintained

UNIVERSAL BORROWING

■Each library determines which of their local patron groups are UB eligible (I-Share eligible).

■ The library reports the UB eligible patron groups to CARLI.

■ I-Share Resource Sharing Code- Purpose section: https://www.carli.illinois.edu/products-services/i-share/circ/I-ShareResourceSharingCode

▼ **Purpose**

The purpose of resource sharing, as defined in this Code, is to extend the library resources available to I-Share and ILLINET libraries' patrons, providing the maximum of access, with the minimum of barriers.
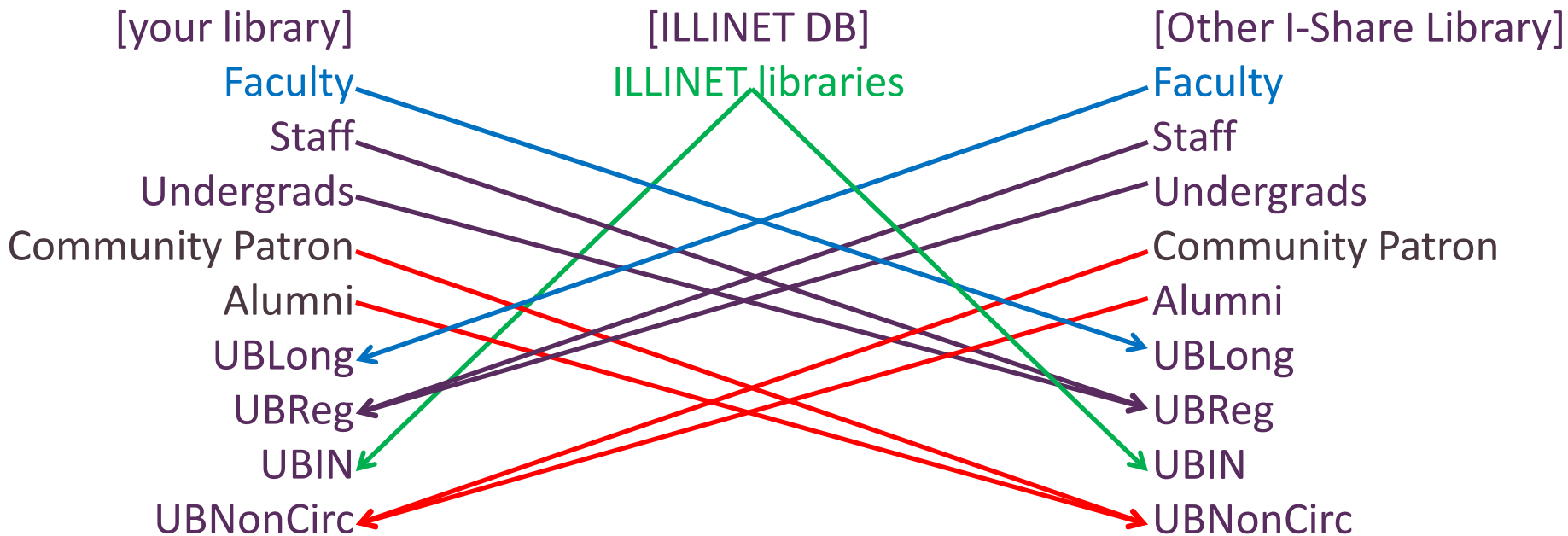
I-Share resource sharing, i.e., patron-initiated or staff-mediated borrowing of materials held by other I-Share member libraries remotely or onsite, is intended to serve the I-Share member libraries' primary clientele including current students, faculty, and staff. I-Share resource sharing is not to be used to provide interlibrary borrowing services to the broader public, e.g., community residents and permit holders. While an I-Share library may opt to serve these individuals from their own collection, these borrowers should be directed to their local public library for interlibrary loan services.

- When your local, UB-eligible patron borrows an item from another I-Share library, their local patron group is mapped to one of the four UB patron groups at the other I-Share library.
- The same happens in reverse.
  - The other I-Share libraries determine which of their local patron groups are UB eligible.
  - Their patrons map to one of the four UB patron groups at your library.
- This mapping allows for standardized settings across the consortium, such as loan periods, renewal periods, notice intervals, and block thresholds.

The Four UB Patron Groups:

- **UBReg**
  - often undergraduates, grad students, and staff
- **UBLong**
  - often faculty or administrators
- **UBIN**
  - the ILLINET libraries that use I-Share to place requests
- **UBNonCirc**
  - Patron groups that do not have UB privileges

Visualization of UB Mapping

[your library]   [ILLINET DB]   [Other I-Share Library]

Faculty   ILLINET libraries   Faculty

Staff   Staff

Undergrads   Undergrads

Community Patron   Community Patron

Alumni   Alumni

UBLong   UBLong

UBReg   UBReg

UBIN   UBIN

UBNonCirc   UBNonCirc

- ILLINET is the acronym for the Illinois Library and Information Network (ILLINET).
  - It is a statewide resource sharing alliance of all academic, public, school, and special libraries that are full members of a multi-type regional library system.
  - There are about 4,350 ILLINET libraries, counting branches (statistics from 2015).

Total ILLINET Libraries ~4350
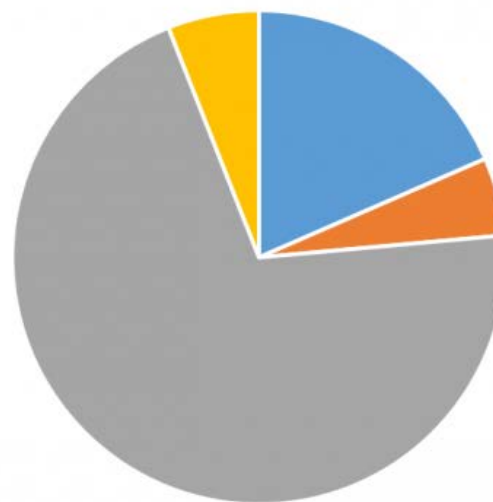
■ Public Libraries ■ Academic and Research Libraries ■ School Library Media Centers ■ Special Libraries

This ILLINET explanation is included in the "Sample Workflows for OCLC Lending" documentation:
https://www.carli.illinois.edu/products-services/i-share/circ/OCLCLendingWorkflows

All 134 CARLI libraries are ILLINET libraries.

- CARLI comprises public and private higher-education institutions, with two-year, four-year, and specialized programs of instruction including museums, historical societies, and private research libraries.
  - The CARLI member libraries serve primarily the students, faculty and staffs of degree granting academic institutions.
- All CARLI libraries (with the exception of the Illinois State Library) are also members of a multi-type regional library system like Illinois Heartland Library System (IHLS) or Reaching Across Illinois Library System (RAILS).

Of the 134 CARLI member libraries, 86 libraries are members of I-Share (not yet counting the 2018 new libs, since you're not yet live with Voyager).

- ■ I-Share libraries share an integrated library system (ILS).

- ■ The 48 non-I-Share CARLI member libraries may have stand alone OPACS or ILS, or they may be members of other local consortia with a shared OPAC or ILS, such as those organized within RAILS or IHLS.

ILLINET LIBRARIES: ~4350

(Circles not to scale)

Academic and Research ILLINET Libraries: ~220

CARLI Member Libraries: 134

I-Share Libraries: 86
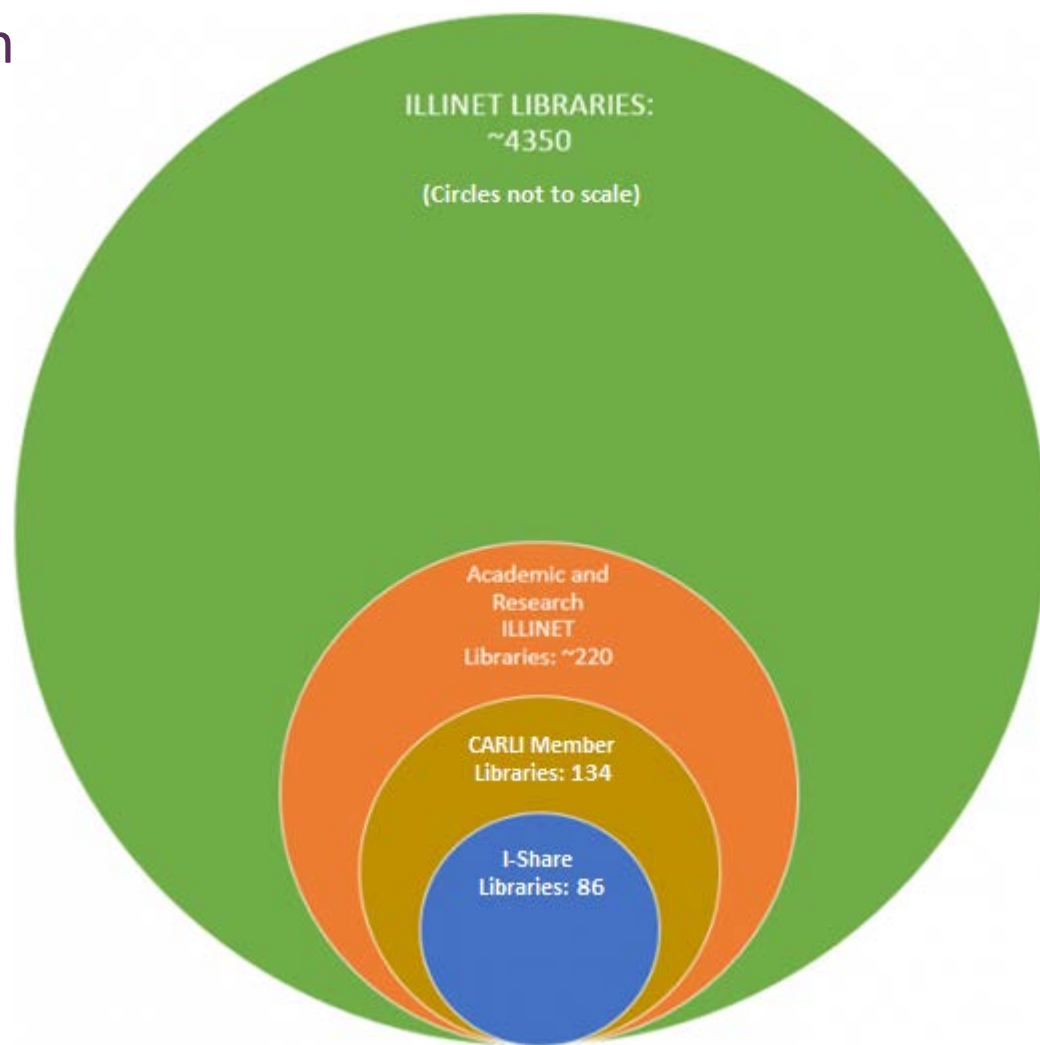
■ Resource sharing is very important to Illinois Libraries.

   ■ ILLINET libraries lend and borrow materials within their own consortia, shared OPACS, and/or shared ILS groups (such as I-Share member library to I-Share member library, or SWAN consortia member to SWAN consortia member).

   ■ I-Share member ILLINET libraries borrow material from, and lend material to non-I-Share member ILLINET libraries.

   ■ Non-I-Share member ILLINET libraries borrow material from and lend material to I-Share libraries.

   ■ All ILLINET libraries (I-Share and non-I-Share) may also lend and borrow material from out of state or internationally as well.

- Non-I-Share ILLINET Libraries are eligible to request library materials on behalf of their patrons directly from CARLI I-Share libraries through the I-Share OPAC.
- To facilitate this: CARLI has created (and maintains) a database of patron records for libraries within Illinois that are a part of a library system, but not part of I-Share, so that they can place requests in the I-Share catalog for their patrons.
  - These ILLINET libraries have 'institutional level' borrowing privileges to place requests on behalf of their patrons in the I-Share catalog.
  - These ILLINET libraries are bound by the I-Share Resource Sharing Code when requesting materials in I-Share.

- CARLI refers to these patron records as the non-I-Share Library's ILLINET ID or ILLINET account.
  - These ILLINET IDs are ONLY used within I-Share; they have no meaning outside of I-Share (as in, they are not an Illinois State Library assigned number used for other purposes).
- Non-I-Share ILLINET libraries use their CARLI-maintained I-Share account (ILLINET ID) to place requests for materials from I-Share libraries and to manage (review and renew) the I-Share materials they have charged.

- I-Share member libraries do NOT have CARLI-maintained ILLINET patron records because patrons from I-Share libraries:
  - may request material directly from other I-Share libraries through the OPAC.
  - may visit other I-Share libraries in person to borrow materials.

- If the material is available to the patron through I-Share, the patron can request it for themselves.
  - As such, the I-Share library does NOT need to place requests in the I-Share catalog on their patrons' behalf.

- I-Share requests placed by ILLINET libraries have an additional processing step in Voyager: https://www.carli.illinois.edu/products-services/i-share/circ/secure/ProcessILLINETRequests

- Any questions about how ILLINET libraries (UBIN patron group) fit into I-Share?

■ Neither the patron's patron group nor the item's item type alone determines circulation privileges.

■ The Sysadmin> Circulation> Policy Definition> Matrix entries determine a patron group's privileges with an item type at the item's library.

  ■ Each matrix entry pairs a specific patron group with a specific item type.

  ■ This determines the patron group's permissions with that item type.

- For your own, local patron groups, you set patron permissions by creating matrix entries for each local patron group.
  - Example: Faculty/Book1 or Undergrad/Video1
- For UB Patrons (the patrons from other I-Share libraries or the ILLINET libraries), you set these policies by creating matrix entries for the UBLong, UBReg, UBNonCirc, and UBIN patron groups.
  - Remember- another I-Share library's patrons always map to one of the first three UB patron groups in your database.
    - Example: UBLong/Book1 or UBReg/Video1
  - The ILLINET libraries always map to the UBIN patron group.

- Many of the settings affecting circulation for the UB Patron groups are standardized across the consortium.
  - Universal Borrowing Policy Standardization: Descriptions and Illustrations
    https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/UBstandardpols.pdf
  - Universal Borrowing Standardized Policies Chart
    https://www.carli.illinois.edu/products-services/i-share/circ/UBStandardChart
- These standard policies allow patrons more seamless I-Share transactions.
  - The Circulation Policies that govern a UB transaction (such as the Loan Period) are universally set across the consortium.
    - Example: All print items checked out by a patron on the same day, will have the same due date, regardless of which I-Share library is the lending institution.
  - The Circulation Limits that allow or block a UB patron's request for an item (such as fine limits or max number of overdue items that can be borrowed by a patron at any one time) are universally set across the consortium.

- "I-Share Best Practices" documentation also helps to standardize practices across the consortium.

- Review the Circulation & Universal Borrowing/Interlibrary Loan section of the CARLI website https://www.carli.illinois.edu/products-services/i-share/circ for documentation, including the ones below:

    - I-Share Best Practices: LOST Item Procedure https://www.carli.illinois.edu/products-services/i-share/circ/secure/bp-LostItem

    - I-Share Best Practices: Damaged Items https://www.carli.illinois.edu/products-services/i-share/circ/secure/bp-Damage

- Question Summary: How does Voyager know which patrons are able to borrow from other I-Share libraries?
  - Circulation System Administration: How Circulation Administration Values are Used During a Checkout https://www.carli.illinois.edu/products-services/i-share/circ/circadminvalues
  - Voyager System Administration in I-Share Libraries: Circulation and Universal Borrowing https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/CircUB.pdf
    - Page References on next slide refer to this document.

- Question Summary: How does Voyager know which patrons are able to borrow from other I-Share libraries?
  - Library staff at the patron's home library assign the patron a local patron group (p. 12)
  - The local patron group is set as either UB Eligible or Ineligible (p. 65-66)
  - CARLI staff have mapped the local patron group to one of the UB patron groups (UBLong, UBReg, or UBNonCirc) at the other I-Share Libraries (p. 16)
  - The other I-Share Library has entered patron group permissions for the UB patron group (p.32-45)
  - The other I-Share Library has created matrix entries for the UB patron group and their item types (p. 49-63)
  - Before allowing a request or a charge transaction, Voyager checks whether the matrix entry is permissive for the patron group/item type.
  - Voyager also checks for patron and item situations, including:
    - Patron suspension
    - Patron expiration date
    - Block thresholds
    - Limit thresholds

- Any questions about patron groups overall?

- Next up: We delve deeper into how your library's Voyager database records UB patron's records/transactions, including what you see in the Circulation Client.

- When another I-Share Library's patron performs a transaction at your library, a temporary "stub" patron record for that patron is created in your library's database.
- This record:
  - Is a copy of their basic patron record in their home library's database including email address, mailing address, and phone. It does not include any patron notes.
  - Will only show the patron's transactions relating to your library.
  - Is deleted by the system when it is no longer in use.

- The same happens in reverse. Stubs are created for your patrons' interactions in the other I-Share libraries' databases

- Stub records are saved in your library's Voyager database for the duration of the transaction.
    - This is different than looking up a patron from another library's database.
- Unlike your local patron records which are only deleted when your library performs a patron purge, UB stub patrons are automatically cleared when they are no longer in use.
    - CARLI runs a server job, called Circjob 29: Purge UB Patron Stub Records, each night to clear stub records whose transactions are complete.

- Let's look at some examples of stub records.

■ First Example: ILLINET

- ■ These are the ILLINET libraries who have a current transaction at your library. The transaction could include:
  - ■ A charged item
  - ■ A lost item
  - ■ Any fines/fees
  - ■ An unarchived call slip request
  - ■ A temporary stub used by Voyager to check for a requested item's availability
- ■ ILLINET example- steps:
  - ■ Search for patron by Name.
  - ■ Set the Library drop-down menu as your library.
  - ■ Enter the last name of ILLINET.
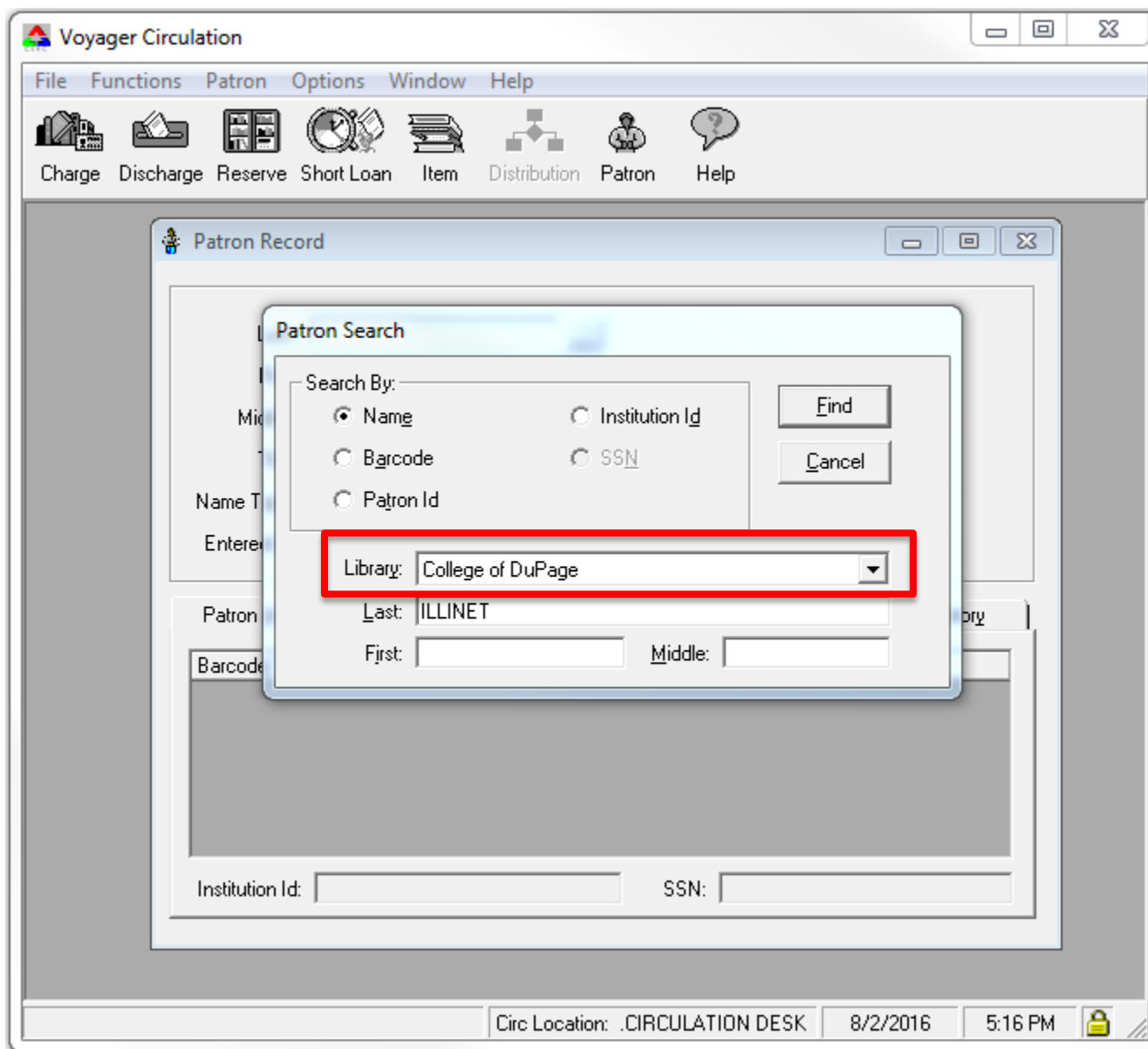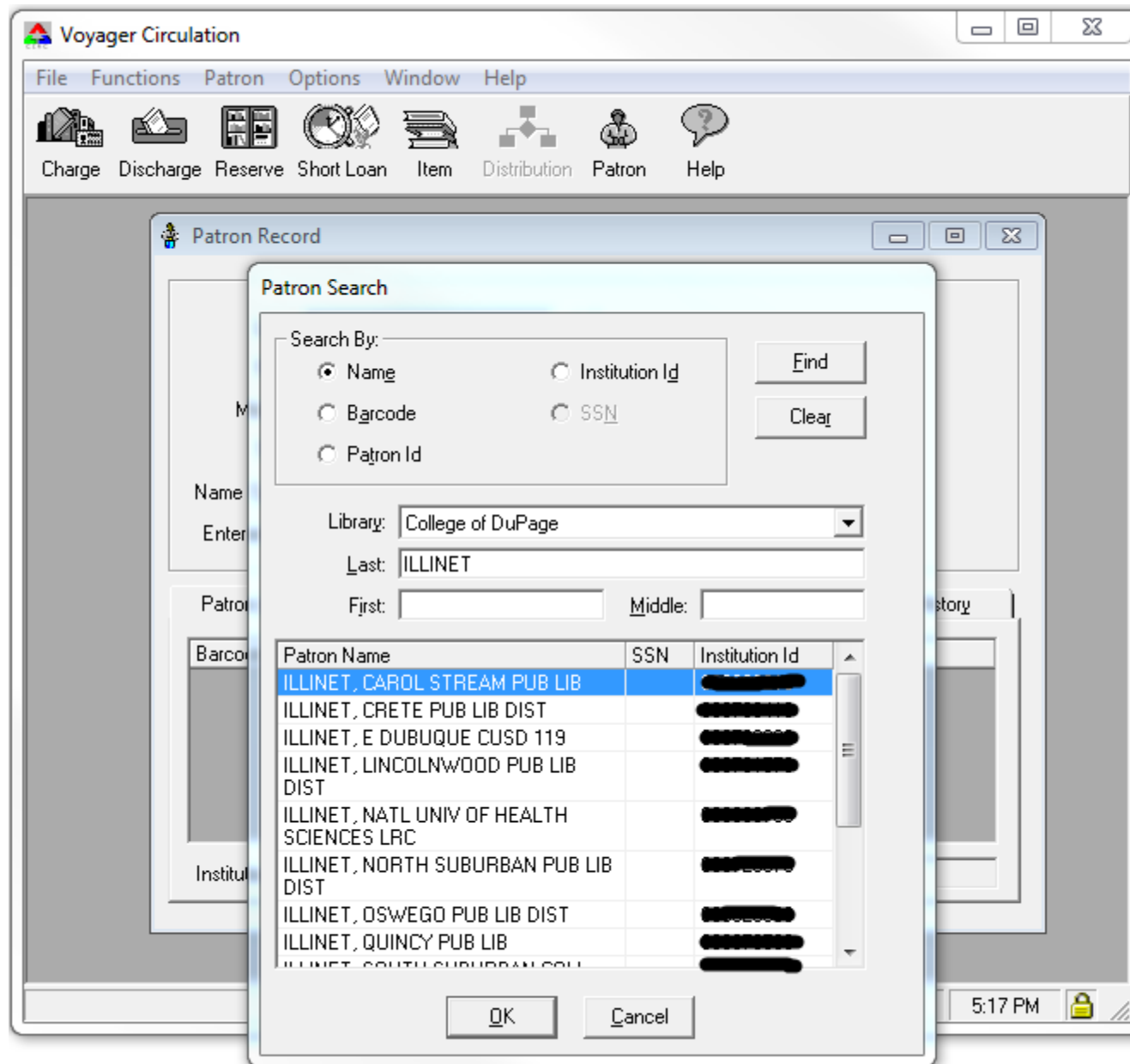
- **Second Example: ILLINET**
  - This is a full list of all of the ILLINET libraries in the ILLINET database managed by CARLI.
    - They are "potential" patrons for your library.
    - They are not saved in your Voyager database (unless they were in the list in Example 1)
    - You are looking at the patron records in their home database.
  - ILLINET example - steps:
    - Search for patron by Name.
    - Set the Library drop-down menu as "ILLINET Libraries".
    - Enter the last name of ILLINET.

- Third Example: Individual Patron
    - These are either your library's home patrons with a last name of Smith, OR an I-Share patron with a current transaction at your library. The transaction could include:
        - A charged item
        - A lost item
        - Any fines/fees
        - An unarchived call slip request
        - A temporary stub used by Voyager to check for a requested item's availability
    - Individual patron example- steps:
        - Search for patron by Name.
        - Set the Library drop-down menu as your library.
        - Enter the last name of Smith.
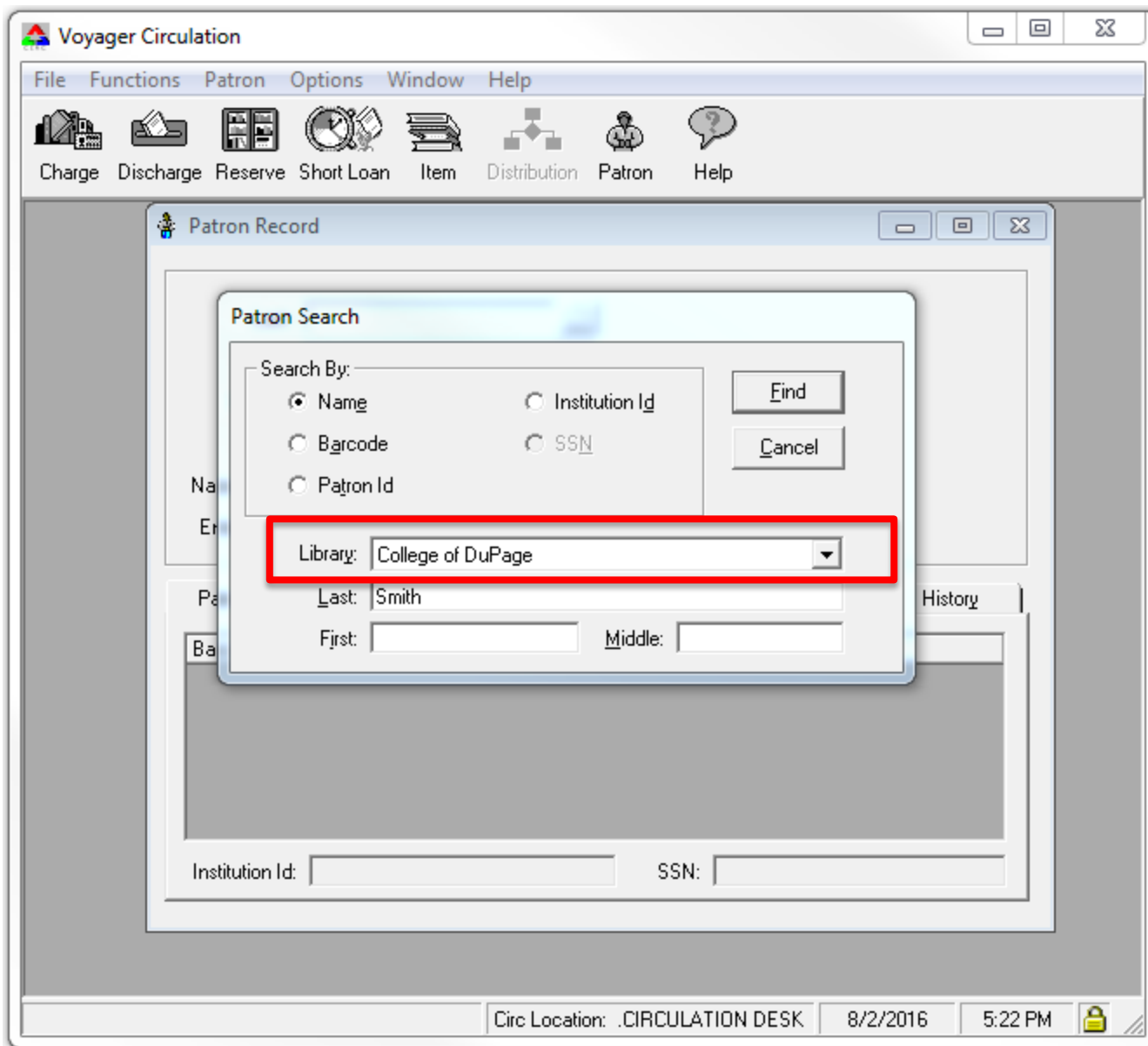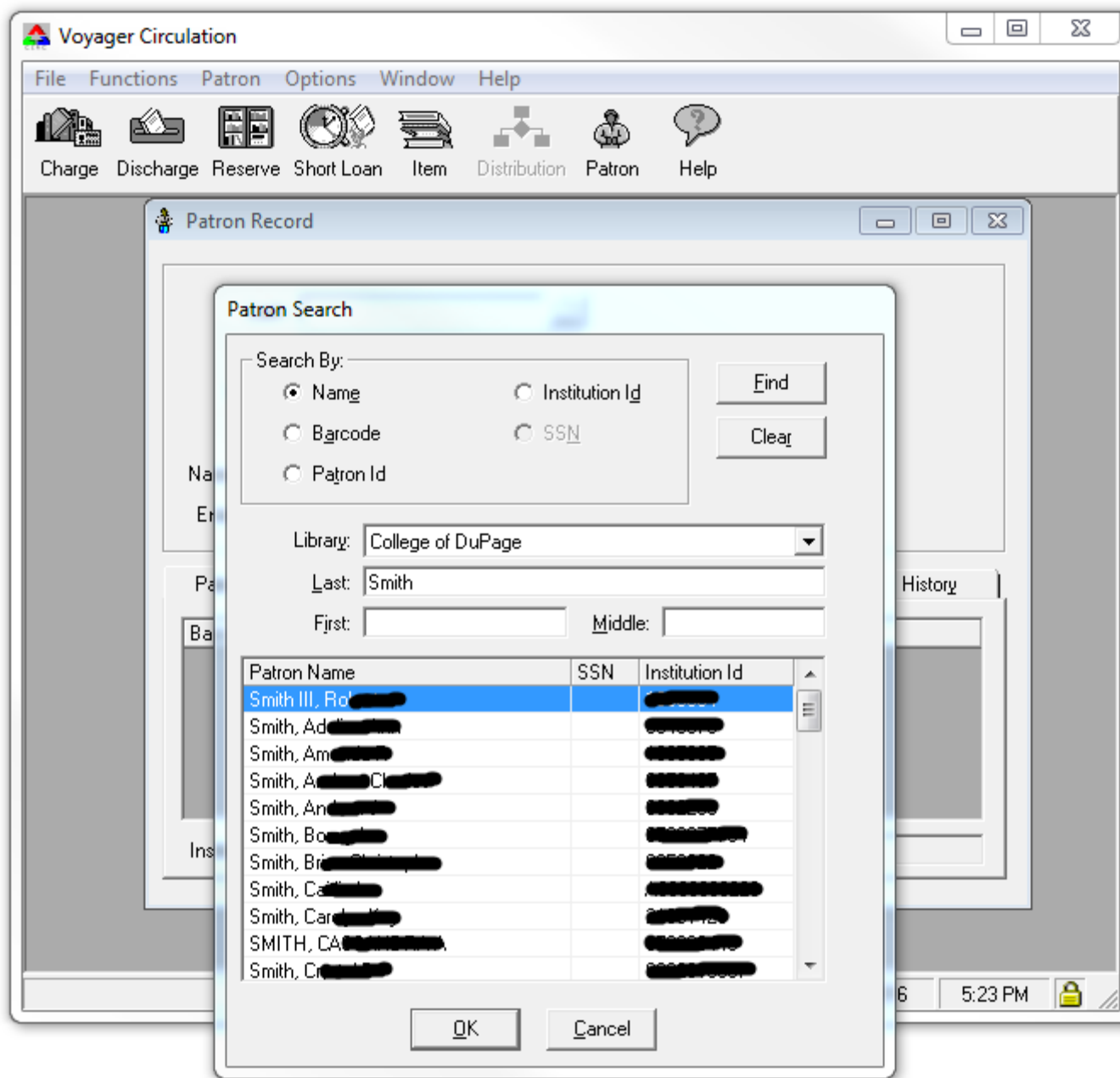
- Fourth Example: Individual Patron
  - This is a list of all of the patrons in the chosen library's database with the last name of Smith.
    - They are "potential" patrons for your library.
    - If the patron came into your library, and they were UB eligible for the item type they've chosen, you could check out material to them.
  - Individual patron example 2- steps:
    - Search for patron by Name.
    - Set the Library drop-down menu to be another I-Share library.
    - Enter the last name of Smith.
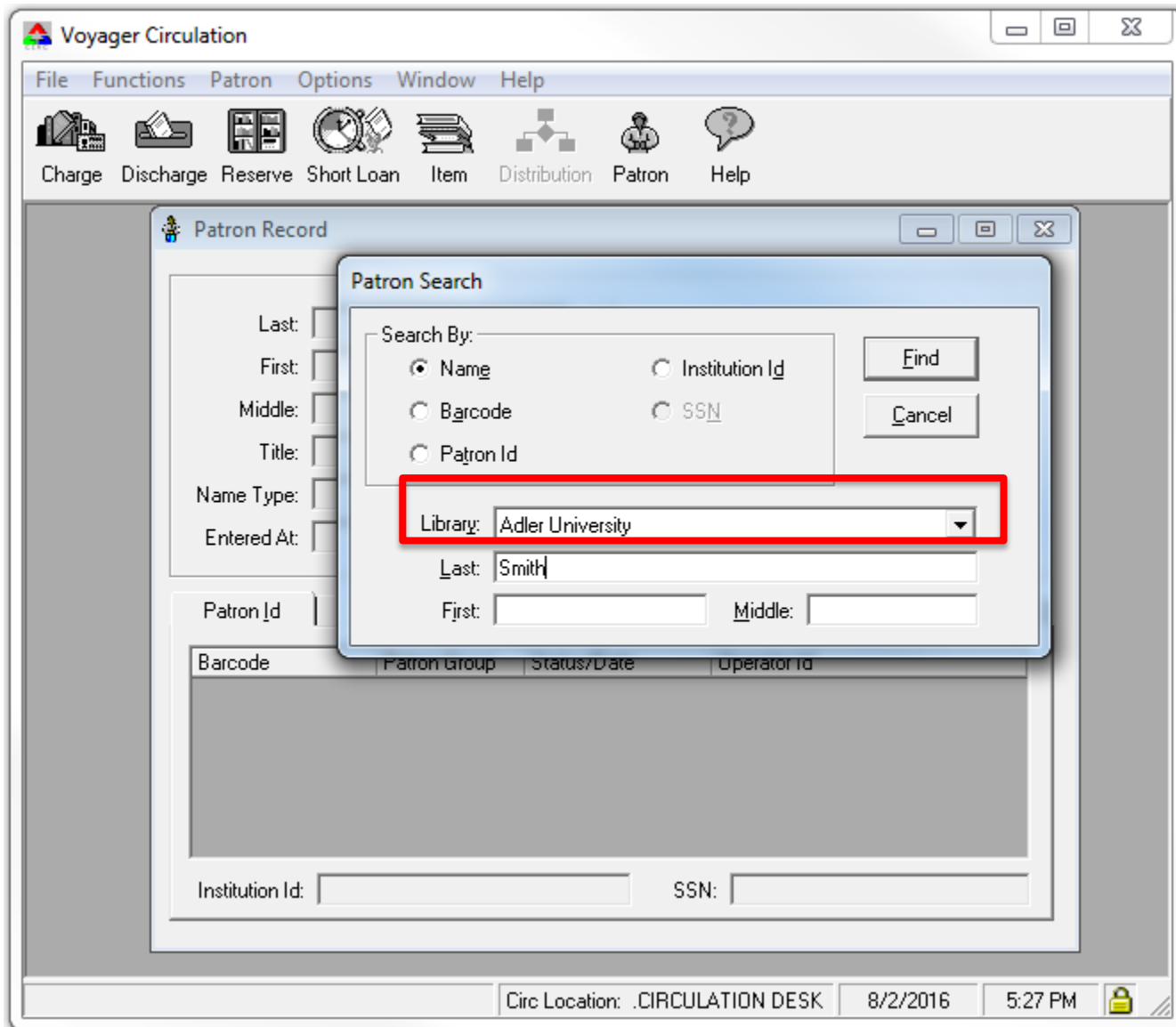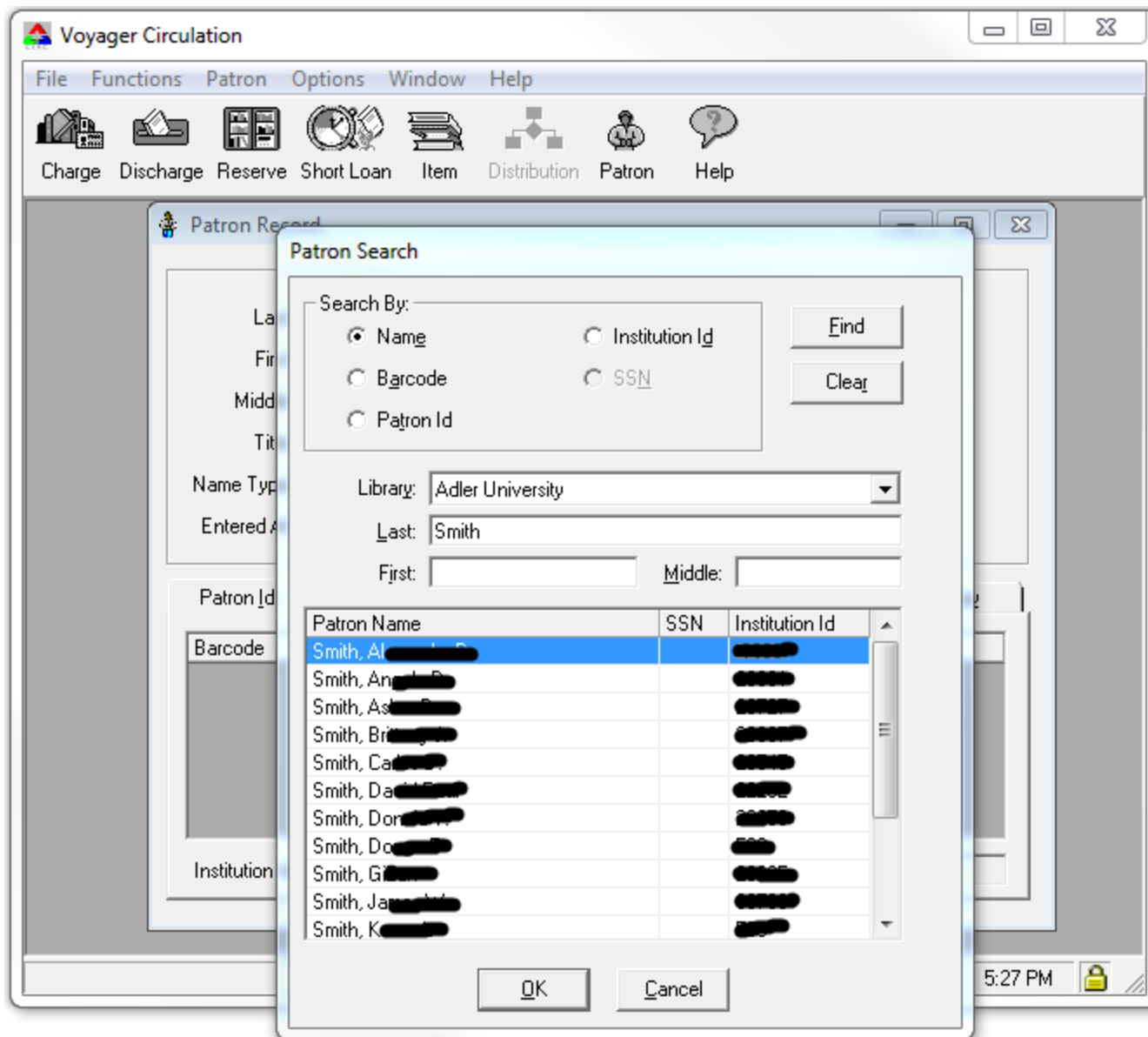
- The previous four examples showed the differences found while searching for patron records
- The next two slides show the difference between a stub record that is saved in your database, and finding a "potential patron" record that is not yet saved to your database.

- Live demo of stub records in Voyager Circulation.
  - ILLINET example:
    - We'll do a patron "Name" search, where we leave the Library field set as our library; this will find the local patrons and stub records.
    - Then we'll repeat with the library field set at "ILLINET libraries" to find all of the potential records in the ILLINET database.
  - Individual patron example:
    - We'll do a patron "Name" search, where we leave the Library field set at our library; this will find the local patrons and stub records.
    - Then we'll repeat with the Library field set at the patron's home library to find their potential record.

■ Any questions about stub patrons?

- Looking patrons up in Voyager Circulation by barcode:
  - Library Barcode Prefixes & Voyager Barcode Lookup
    https://www.carli.illinois.edu/products-services/i-share/circ/barcode-formats
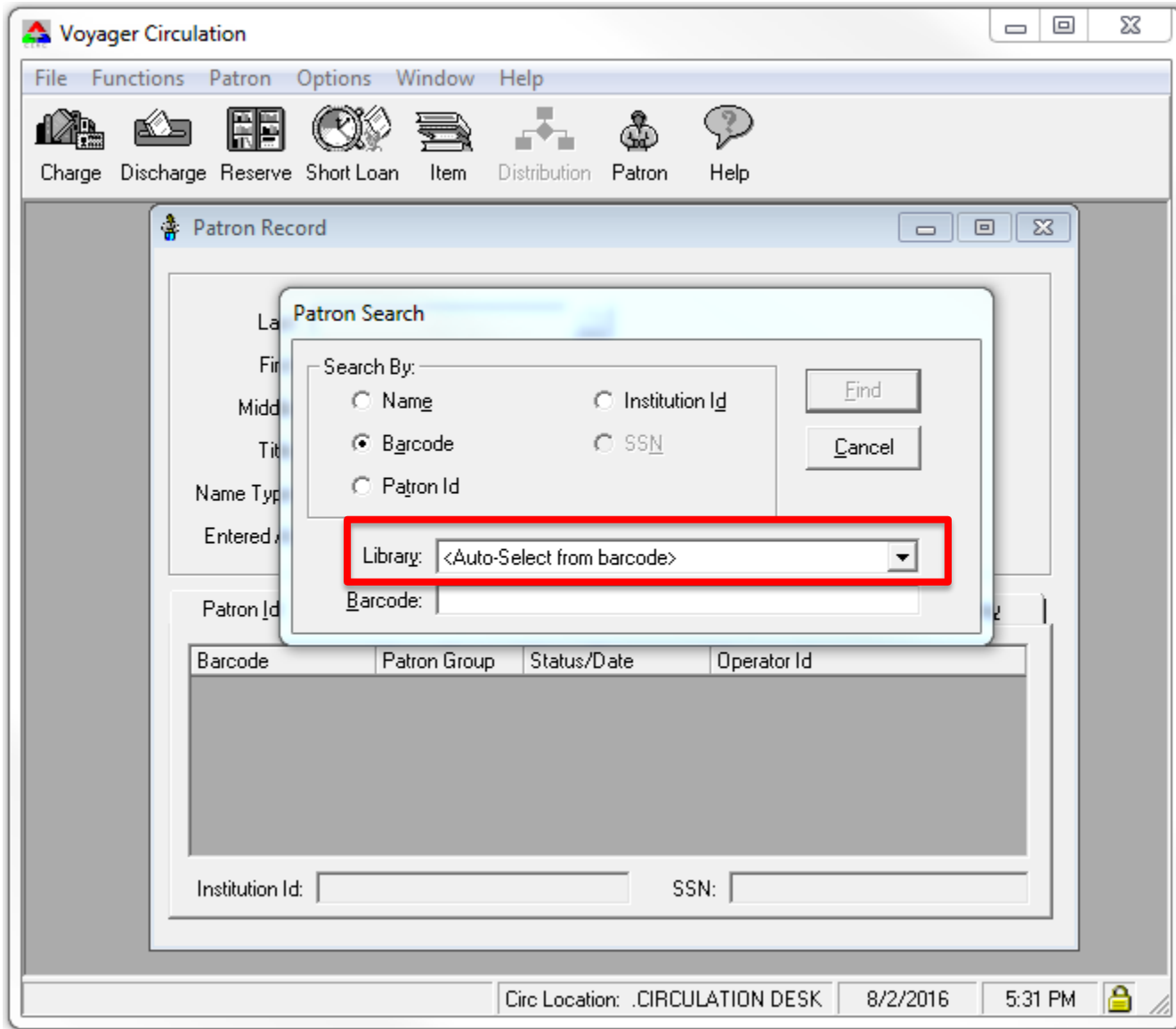
■Your library's Circ Client:

- Will display only a limited amount of information about UB transactions.
  - From your library's item record: Patron information on a charged item or an item request.
  - From your library's patron's record: Item information on pending or available requests.
  - From the "stub" patron record: Charge information and fines/fees information for the other I-Share library's patron's transactions at your library.
- Will not display your patrons' requests, charges, recalls, or fines/fees accrued from another I-Share library.
- The only place to see a complete list of UB transactions is in the patron's individual VuFind or WebVoyage account.

Going back to the information from the beginning of this section, we said:

■Each library determines which of their local patron groups are UB eligible (Universal Borrowing eligible).

Now, time to discuss the UB Mapping worksheet for how your library reports your UB eligible patron groups to CARLI.

■ Questions about Universal Borrowing or the relationship between two I-Share Libraries?

CALL SLIPS (LOCAL AND UB)

- **Call Slip Daemon (Call Slip Client)**
  - Produces the call slips for local requests-- your patrons requesting your items (if enabled).
  - The Daemon is also used for UB call slips-- the patrons at other I-Share libraries requesting to borrow your items.
- **Call Slip Queues:**
  - are where requests for items are received and processed in the Call Slip Daemon.
  - are established based on item location.
  - collect both local call slip requests and UB requests.
  - Your library may have one or multiple queues.

Each call slip queue is filled with its own list of requests. Queues are location based.

The requests are forwarded to a queue based on the "Rules" created in SysAdmin.
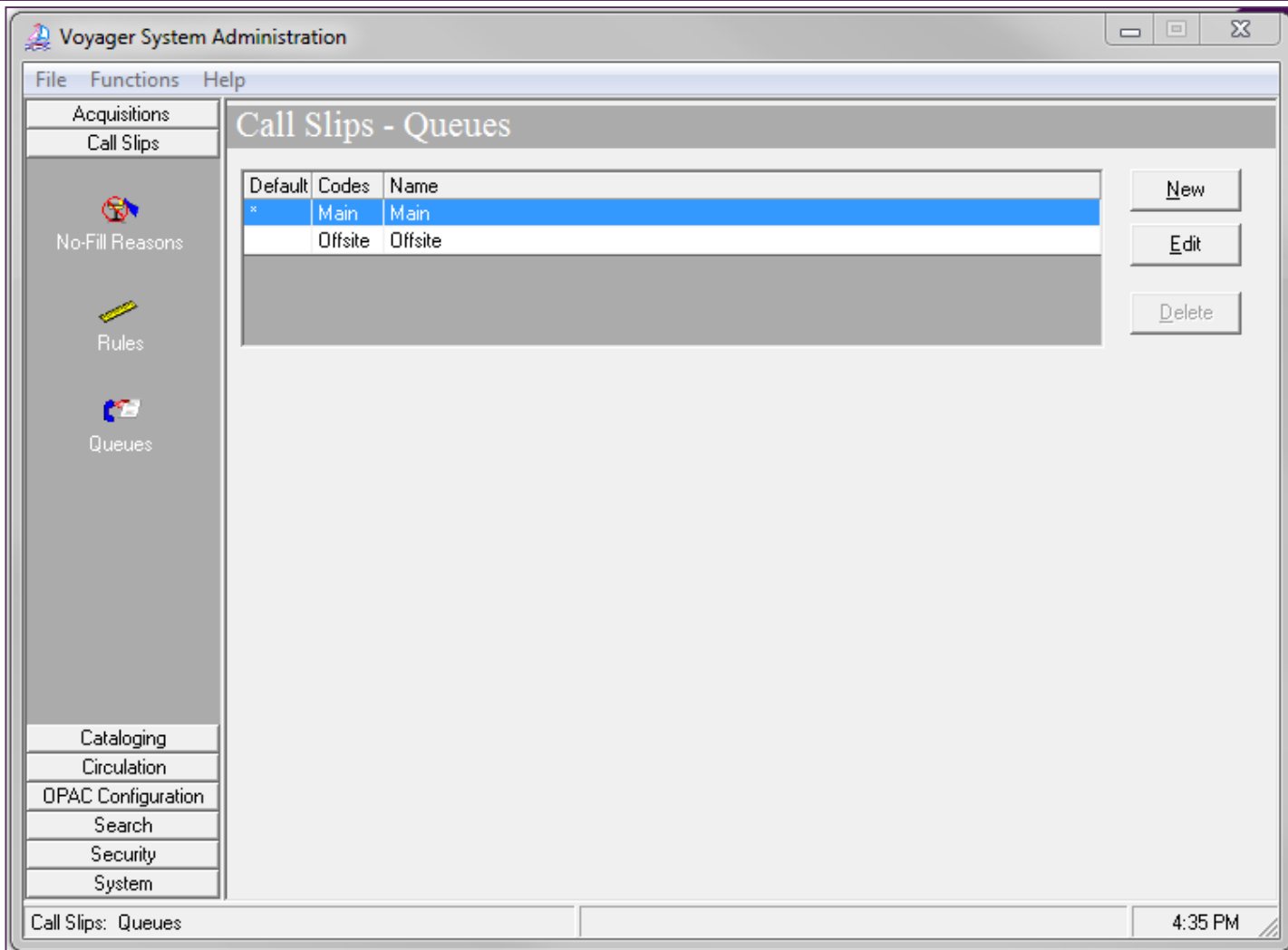
Screenshot showing the Voyager SysAdmin, Call Slip section.

Voyager System Administration in I-Share Libraries: Call Slips
https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/callslips.pdf

The Rules established in SysAdmin use the item's location to determine which call slip queue should receive which requests.

If there is only one queue, all request will go to that queue by default.

- IF…
    - your library's policies allow "paging" (your patrons initiating requests for your items through the OPAC) or
    - your library allows staff to initiate requests for your patrons for your items from the Circulation client
- AND IF…
    - your library will send the item directly to your patron (via campus mail or other service), or hold the item at the pick-up location (hold shelf) for the patron to pick up, or deliver them to another I-Share library for your patron to pick up
- THEN…
    - this is called Local call slip. You need call slips to inform your library staff of items to be pulled from your shelving/storage locations on behalf of your patrons.

- Local Call Slips: Considerations, Instructions, and FAQ
    - http://www.carli.illinois.edu/products-services/i-share/circ/secure/LocalCallSlips

■Regarding Local Call Slip Requests:

■ If local requests are enabled, the item's library can determine whether their own patron can only pick up the requested item at the local library, or whether the item delivered to another I-Share library for pick-up.

■ This decision is recorded in the Matrix entry settings in Voyager SysAdmin.

■ If a local request is unfilled by the patron's home library, and the patron's patron group is UB-eligible, it is **promoted** out to I-Share so that another library can potentially fill it.

■ It then becomes a UB request.

■UB call slips are requests made by other I-Share library's patrons for your library's materials.

■ UB call slips come in two types:

- **Direct:** When the I-Share library's patron specifically requests your library's copy (or the OPAC selects your library's copy through the "Request First Available" functionality).
- **Promoted**: When another I-Share library received the direct request first, but was unable to fill it.

■An I-Share patron:

- can choose any I-Share library as the pick-up location for their UB Request.
- can return their I-Share borrowed material at any I-Share Library.

Request Slip (Call Slip):

- Prints from the Call Slip client.

- Displays item information for library staff to pull the correct requested item from the shelving/storage location.

- Includes patron information to assist with ILLINET requests.

Route Slip:

- May print from the Call Slip client, the Circulation client, or the Cataloging client.

- The Route Slip contains address or routing information so staff can forward an item to the correct Happening or Pick-Up location.

- The Route Slip that prints from the call slip client looks different than the one that prints from the Circulation Client, but the information is similar.

Hold Slip:

- Prints from the Circulation client.
- The Hold Slip is attached to the item (such as via bookstrap or slipped inside like a streamer), and the item is placed on a Hold Shelf until the item is picked up by the patron, or returned to the item's home library and shelving/storage location.

- **Call Slip Client**
  - Slips that print from the Call Slip Daemon are formatted by the Callslip.ini file.
  - To review the settings in the Voyager 9.1.1 Consortial Callslip.ini file: http://www.carli.illinois.edu/products-services/i-share/circ/secure/V911CallslipINI
  - Ask CARLI Support any questions.

- **Circulation Client**
  - Slips that print from the Circ client are formatted by the Circ.ini file.
  - Portions of the format of the slips can be edited to meet your library's needs.
  - Directions are available: http://www.carli.illinois.edu/products-services/i-share/execute/secure/ModifyVoyagerINI
  - Ask CARLI Support any questions.

- Any questions about the basic setup of the call slip client?
- We'll discuss how to use the client in daily workflows next.

EXAMPLE REQUEST

- Patty Patron (from UIUC) requests an item owned by ISU.
  - The OPAC forwards the request to the Call Slip daemon at ISU.
  - The Call Slip daemon routes the request into the appropriate queue.
- ISU library staff see the request in the Call Slip daemon.
  - ISU prints a Call Slip to find the item on the shelf.
- ISU fills the request using Call Slip daemon.
  - ISU locates the item on the shelf, checks that the item is not damaged, and marks the request as "filled."
  - Call Slip Daemon prints a route slip with address info.
  - Item status is changed to "In Transit On Hold."

Item Type	Item Status
Book 16-4 wk	In Transit On Hold

- ISU ships the item to the UIUC address on the route slip via ILDS:
  - This location is the patron's pick-up location at UIUC, or a distribution center at UIUC [campus mail], which will forward the item to the patron's pick-up location.

- **The item arrives at UIUC.**
  - UIUC staff unpack the ILDS bag and check the item for damage/notes.
  - They discharge the item to route it in. Voyager Circ prints either a Hold or a Route slip, if a Route slip prints then the item is forwarded to the patron's pick-up location.
- **The pick-up location discharges the item in Voyager Circ.**
- **Once the item has been discharged:**

Item Type	Item Status
Book 16-4 wk	On Hold

  - Item status is changed to "On Hold."
  - Hold slip is generated informing the library staff to put the item on the Hold Shelf for the patron.
  - UIUC places the item on the Hold Shelf at the patron's pick-up location.
  - An Item Available notice (if enabled in SysAdmin) is generated overnight or during the noon hour by circjob5, informing the patron that the item is ready for pickup.
- **The patron arrives and library charges (checks out) the item.**

Item Type	Item Status
Book 16-4 wk	Charged

- The patron writes a FANTASTIC research paper using the item.
- The patron returns the item to a circulation desk at UIUC.
- UIUC checks the item for damage and, when none is found, discharges the item.
  - The CIRC client prints a route slip with ISU address information.
  - Item status is changed to "In Transit Discharged from XXX to XXX"
- UIUC sends the item back via ILDS to the ISU address on the route slip.
- The item arrives at ISU.
- ISU staff check the item for damage and when none is found, ISU staff discharge the item to remove "In Transit" status.
- ISU reshelves the item.

- No matter which ISU Circ Happening location receives the item back at ISU, the receiving Circ Happening location discharges the item and routes the item to the correct shelving/storage location.
  - The item may be routed more than once for it to arrive at its final shelving location if the library has multiple branches.
  - Or, the initial location may also be the final location.
- Once the item has been received at the final location:
  - The item is discharged and the item status changes to "Discharged."

Item Type	Item Status
Book 16-4 wk.	Discharged

  - The shelving interval passes (time you configure in SysAdmin to estimate how long it takes your library to reshelve items).
  - Circjob1 runs overnight and changes the item status to "Not Charged".

Item Type	Item Status
Book 16-4 wk	Not Charged

Any questions about the call slip client?

Documentation

- Best Practices: How to use the Call Slip Client
  http://www.carli.illinois.edu/products-services/i-share/circ/secure/bp-CSDaemon

- Best Practices: Processing ILLINET Requests
  http://www.carli.illinois.edu/products-services/i-share/circ/secure/ProcessILLINETRequests

- Voyager 9.1.1 Consortial Callslip.ini: Overview and Installation
  www.carli.illinois.edu/products-services/i-share/circ/secure/V911CallslipINI

- Local Call Slips: Considerations, Instructions, and FAQ
  http://www.carli.illinois.edu/products-services/i-share/circ/secure/LocalCallSlips

- Best Practices: Call Slip Processing when Library is Closed
  http://www.carli.illinois.edu/products-services/i-share/circ/bp-callslipproc

- When you have to charge before you send: How to deliver local and I-Share materials via mail, or via service points with no access to Voyager Circulation
  http://www.carli.illinois.edu/products-services/i-share/circ/secure/BranchMailCallSlip

LIVE DEMO OF CALL SLIP

- Demo of four scenarios:
  - Three filled call slips
    - Local call slip
    - Regular ABA call slip (patron from library A, item from library B, pick up at library A)
    - ILLINET call slip
  - Unfilled call slip

REQUEST PROMOTION

An example…

I-Share libraries are in a resource sharing network that is currently using "Voyager's UB and Request Promotion".

- Let's say that Patty Patron -- the patron from UIUC from our previous example-- requests a specific item from ISU through the OPAC.

- Voyager creates a Call Slip request at ISU.

- ISU discovers that the item is too damaged to be sent to Patty.

- ISU library staff un-fill the request, and change the status in the item record appropriately.

- That night, Circjob32 runs and tries to promote the request based on [DBCODE] in ISU's promote.cfg:

ISU's [DBCODE]

[DBCODE]
UIUCdb
OAKdb
WIUdb

Circjob32 (the promotion circjob)

- Steps through the libraries in ISU's [DBCODE]

- UIUCdb is not eligible to receive this request*
therefore, UIUCdb is not queried
by Request Promote

- OAKdb is eligible to receive this request*
therefore, OAKdb is queried
by Request Promote

- OAKdb has an available copy.*

- Creates a new Call Slip -- a title-level request* in OAK's correct Call Slip Request queue.

- Archives the un-filled request at ISU

ISU's [DBCODE]

[DBCODE]
UIUCdb
OAKdb
WIUdb

More on this shortly.

On the previous slide, ISU did not try to promote the request to UIUC. Why not?

A library in [DBCODE] is not eligible to receive a promoted request when the library is the patron's home library.

- UIUC is Patty Patron's home library.

- Promote assumes that some other library is trying to fill Patty's request because Patty's home library (UIUC) does not have an available copy.

- Therefore, UIUC is not eligible to receive Patty's request from Request Promote.

__Also__… A library in [DBCODE] is not eligible to receive a promoted request when the library has already no-filled the request.

A request is promoted based on the promote.cfg of the library that no-filled the request. In other words:

OAK's [DBCODE]

[DBCODE]
ISUdb
UIUCdb
WIUdb

- ISU has promoted the request to OAK.
- OAK receives the request, then discovers the item is lost.
- OAK no-fills the request.
- OAK's next run of Circjob-32 will promote the request based on OAK's promote.cfg file.
- OAK's [DBCODE]:
  - ISU has already no-filled the request.
  - UIUC is the patron's home library.
  - The first eligible library in OAK's [DBCODE] is WIU.

- The request promote batchjob searches eligible libraries to find a bib record that matches the promoting request, based on search criteria defined in the [MONOGRPAHS] or [SERIALS] stanzas of each library's promote.cfg file.
  - The promoted request receives the bib_id of the first bib record that matches the search criteria.
- Because a newly promoted request in based on the bib_id instead of the item_id, the promoted request is a "title-level request".
  - Promoted requests do not take Matrix Entries into consideration.
  - Promoted requests do not take OPAC suppression into consideration.
- You can identify a promoted request in your call slip queue because they have no item barcode in the call slip.

There are several ways a request can reach the "end of the line"; that's when a request cannot be promoted and will be unable to be filled.

■ This is because none of the libraries in the [DBCODE] list can receive the request. Each library is either:

■ Ineligible because it is the patron's home library.

■ Ineligible because it has already no-filled the request.

■ Eligible, but does not have a "Not Charged" or "Discharged" copy of the item.

■ The system-generated "not needed after" date has passed.

■ CARLI staff have developed a custom-report for I-Share libraries to assist them in informing their patrons when their requests can't be promoted any further.

- Voyager does not have such a utility.

- Available in your library's ftp directory.
  File name: dead_req_xxx_mmmdd_yyy.txt

- Contains bibliographic and patron information so that staff can advise the patron on an alternative requesting procedure.

- Some libraries use these lists to contact patrons, others do not.

- It all depends on workflow and available time.

- Any questions about how call slips are promoted?

FINAL Q & A?

- A recording of a similar presentation is available:
  - I-Share Documentation> Circulation & Universal Borrowing/Interlibrary Loan> linked under "Circulation Processes & Transactions" section.
  - Also linked directly from the Voyager Circulation Training Video Series> linked under Circulation Workflows> "I-Share Overview Webinar" section. https://www.carli.illinois.edu/products-services/i-share/circ/secure/VoyagerCircTraining

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.

- Send questions at any time to support@carli.Illinois.edu
- Telephone: 217-244-7593 or Toll Free: 866-904-5843

- I-Share Documentation for Circulation & Universal Borrowing/Interlibrary Loan https://www.carli.illinois.edu/products-services/i-share/circ
- I-Share Documentation for Voyager System Administration https://www.carli.illinois.edu/products-services/i-share/sysadmin

CONTACT INFORMATION