CARLI

THE I-SHARE RESOURCE SHARING ENVIRONMENT:
RELATIONSHIPS AND PROCESSES

Thursday, August 4, 2016

1

Hello and welcome everyone. During this presentation, we'll cover the foundational principles and processes that establish Universal Borrowing in Voyager.

I've adapted this webinar from the in-person Universal Borrowing (UB) Training that CARLI provides to libraries joining I-Share.
The intended audience for this webinar is current I-Share library staff who work with, or are interested in, I-Share Resource Sharing.

Library staff who are already familiar with Voyager Circulation and Call Slip will likely get more from this webinar, however, I'm happy to have everyone in attendance.
I look forward to your comments and questions as we discuss this topic so integral to the workflows of I-Share libraries.

INTRODUCTION

■ 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

2

Throughout today's webinar I'll tend to use the two terms on this slide interchangeably, even though they technically refer to different things. In my mind, they are synonymous with the same workflow.

Universal Borrowing or UB for short, is the Voyager software package which, when enabled, allows for connections to be made between each individual library's Voyager database.
So, UB is the Voyager framework that allows one I-Share library's database to talk to, and perform transactions with, other I-Share libraries' databases.

When CARLI staff perform "UB integration" for a library that joins I-Share, we enable the Universal Borrowing software package for the institution and then finalize the UB settings in Voyager System Administration that connect the databases together.
The link on this page for the "Ex Libris Voyager Universal Borrowing (UB) User's Guide" will take you to the technical documentation from Ex Libris about UB.

Now, I-Share is the term used to define the CARLI member libraries who have chosen to use the same integrated library system and OPAC, which is currently Ex Libris' Voyager.

I-Share provides participating libraries with an online catalog (OPAC) of their own collection as well as a merged, union catalog of the holdings of all I-Share libraries, and supports resource sharing among participating libraries.

The I-Share concept existed with the name "ILLINET Online" between 1990 to 2005. Then in 2005, the CARLI Board approved a change of the name of the shared online system from "ILLINET Online" to "I-Share".
I-Share will also continue into "I-Share Next", the selection of the next generation of I-Share, i.e., a shared library management system for CARLI.

The link included in the slide to the "I-Share Overview" will take you to our webpage where you can read more about the basics of I-Share membership.

I-Share Libraries all abide by the I-Share Resource Sharing Code and the I-Share Agreement- We'll see them again later on in this webinar.

The I-Share Agreement outlines the terms for institutional participation in I-Share, and the responsibilities of participating institutions.
The I-Share Resource Sharing Code outlines the policies and procedures that apply when I-Share is the method used for resource sharing. The document also provides a brief history of I-Share.

So, CARLI I-Share libraries use Voyager, and Voyager uses UB to connect the I-Share Libraries' databases together.
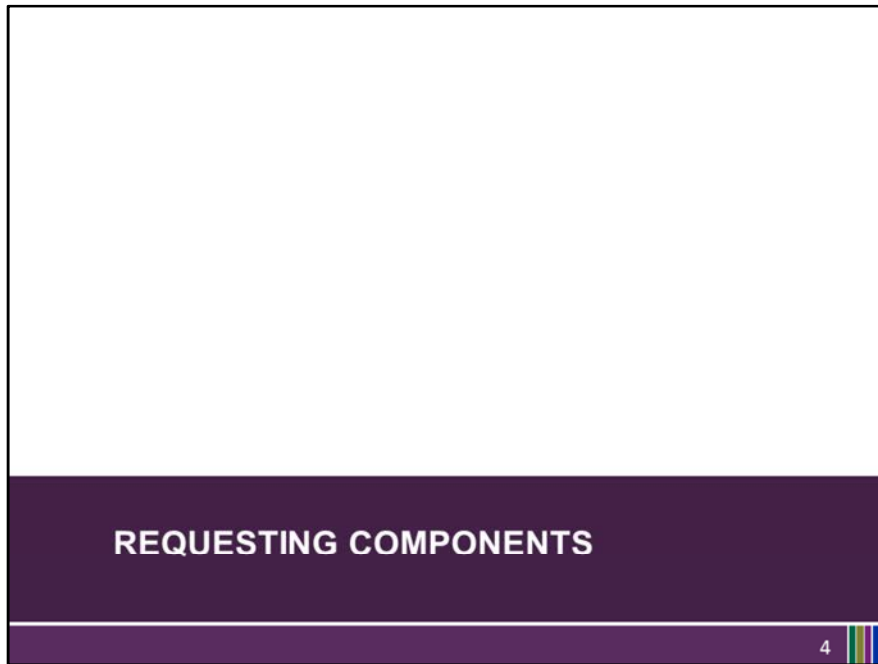
- Overview of resource sharing between I-Share libraries.
- We'll cover:
  - Background
  - UB Integration and patron group mapping
  - Request promotion
  - Call Slip Daemon
  - Request processing
  - Final Q & A

3

During this overview of resource sharing between I-Share libraries, we'll cover background and setup information; we'll discuss UB integration and patron group mapping, request processing and the Call Slip client, ending with an explanation of the request promotion process, and Q & A.

ILDS delivery and delivery workflows, while integral and important to I-Share Resource sharing, are beyond the scope of this webinar.
We will also not be covering the details on library OPACS or discovery layers in this webinar.

REQUESTING COMPONENTS

Let's start with an overview of all of the pieces involved in I-Share Resource Sharing; the parts we'll call the "Requesting Components".

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

5

The first requesting component, and most foundational to all of our library services, is people.
The three big categories involved in I-Share are:

Library Staff
You all, the staff at I-Share member libraries, determine your local policies and reflect them in your Voyager settings;
you agree to abide by consortial policies and best practices so that all of our patrons receive consistent services.
You are who processes the patrons' requests in the Voyager clients and assist patrons with all stages of those requests.
You prepare materials for shipment and receive delivery of incoming materials.

Patrons
Your library's patrons initiate requests in the OPAC.

CARLI Staff
CARLI staff are here to support libraries in their use of Voyager (and in the future, "I-Share Next").

We assist libraries however we're able- whether it be through explaining policies, determining workflows, troubleshooting issues, or other topics.
CARLI staff also enforce consortial policies and settings.
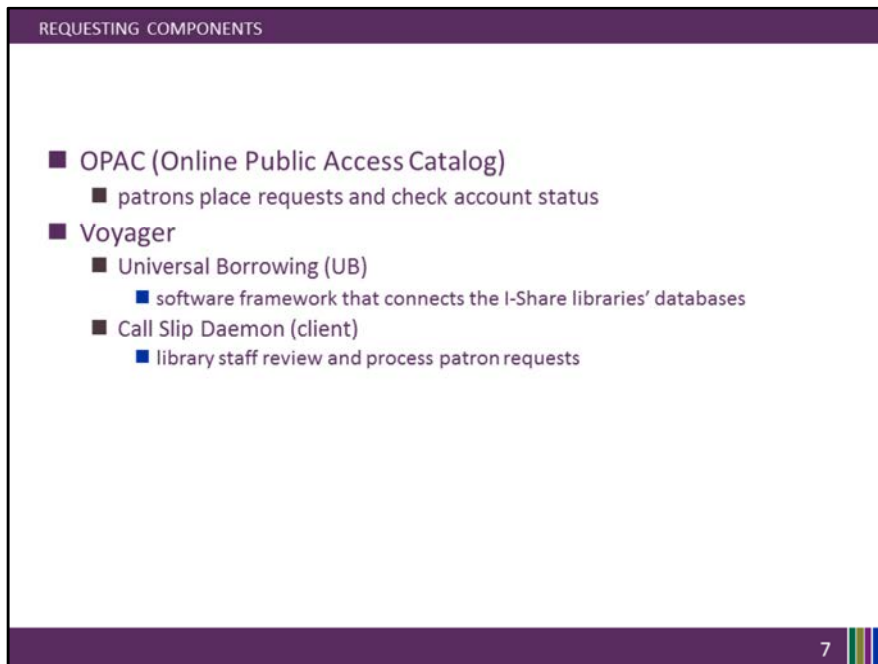
REQUESTING COMPONENTS

■ **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.)

Second requesting component category is your library's collections;
your library is able to choose which item types to lend, and to which patron groups.

The Resource Sharing code explains that the:
"quote" exchange of materials between libraries is an important element in the
provision of library service and it is believed to be in the public interest to encourage
such an exchange."

Also "quote" The purpose of resource sharing, as defined [by the] Resource Sharing
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."

- 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

7

Looking at the software-

The OPAC is where patrons see the I-Share library holdings. It's where they place requests and check their own account status.

The OPAC connects into Ex Libris's Voyager, which is the library management software I-Share currently uses.
Each I-Share Library has their own Voyager database, with their patron and item information.

We've defined that Universal Borrowing (UB) is that software framework that connects the I-Share libraries' databases making it possible for cross-library transactions to occur.

The Voyager Call Slip Daemon is where library staff review and process patron requests. This includes both UB requests and local requests if enabled (more on this later).

REQUESTING COMPONENTS

- 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

8

Continuing with Voyager, the Circulation Client is where library staff check out/discharge requested material.
Library staff can also place call slips, holds, and recalls for local patrons for local items (if enabled).

System Administration is where the settings are entered and configured to make the system work
Your library staff determine local policies; SysAdmin is also where the consortial policies are entered and maintained.

Of course Cataloging and Acquisitions are also important, but their impact is outside the scope of this webinar.

UNIVERSAL BORROWING
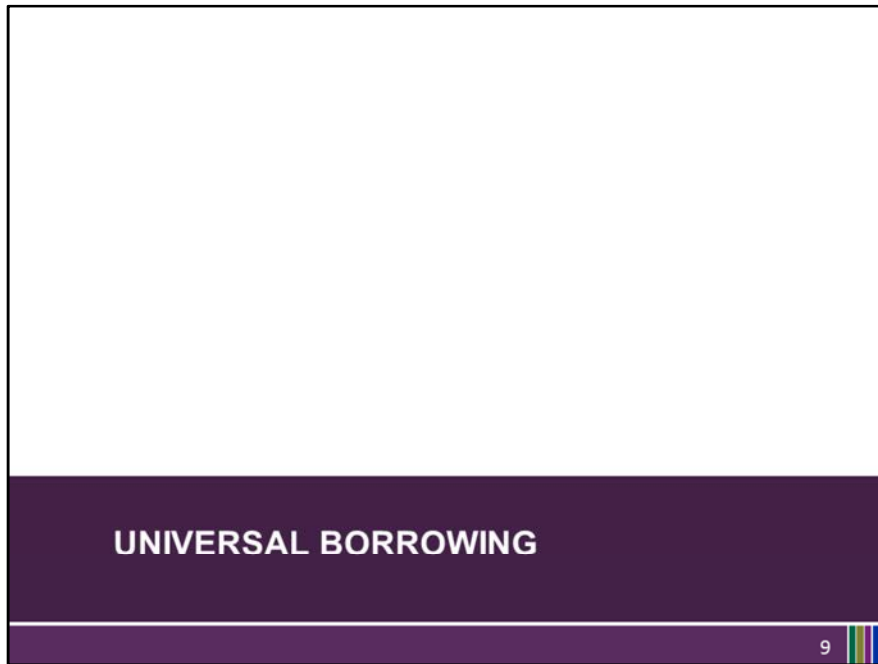
Let's build on those requesting components now by discussing UB integration.

UB integration is the broad term for the process of configuring an I-Share library to connect to the other I-Share libraries' databases.

The initial UB integration involves setup both on the part of the library and CARLI staff. When a library joins I-Share, UB integration begins with CARLI library staff enabling the UB software on the Voyager server, so that the I-Share library databases are able to connect to each other.
CARLI staff then perform initial setup in Voyager System Administration by defining each library's database for every other library.

It continues with reviewing a library's policies relating to Universal Borrowing, and then converting library policies into Voyager SysAdmin settings that reflect those policies and the consortial polices.

UB: PATRON GROUPS

■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.

10

By the time the UB integration process begins, a library has already set up their local patron groups.

For libraries joining I-Share, those patron groups are established during the database migration process, where the library's data from their former library management system is imported into Voyager.

Each library determines which of their local patron groups are UB eligible and reports the UB eligible patron groups to CARLI.

Current I-Share libraries can add new patron groups as needed for local operations. When library staff add a new patron group that should have I-Share Privilege, that patron group needs to go through UB integration as well.
If your library adds a new UB eligible patron group, send an email to CARLI support.

These UB eligible/not eligible choices are reflected in Voyager System Administration> Circulation> UB Policy Definitions.
We'll briefly discuss a few System Administration settings later, but System Administration is a huge topic in itself that we don't have time for today.

A recent update to the Resource Sharing code helps to clarify who is eligible for UB privileges:

"quote" I-Share resource sharing… 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... 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. "end quote"

So, Community (unaffiliated) patrons are not UB eligible at any I-Share library. Other (affiliated) patron groups are at the library's discretion- such as alumni and retirees.

As an FYI, CARLI plans to perform an audit for this and may contact your library for more information regarding the UB eligibility of some patron groups.

- 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.

11

When your local, UB-eligible patron borrows an item from another I-Share library, your patron's local patron group is mapped to one of the four UB patron groups at the other I-Share library.

The same happens in reverse.
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UB: PATRON GROUPS

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

12

The four standardized UB patron groups are:

UBReg - often undergraduates, grad students, and staff
UBLong – often faculty or administrators
UBIN- the ILLINET libraries (we'll talk more about them shortly)
And UBNonCirc- which are the patron groups that do not have UB privileges.

Let's look next at a visualization of UB Mapping.
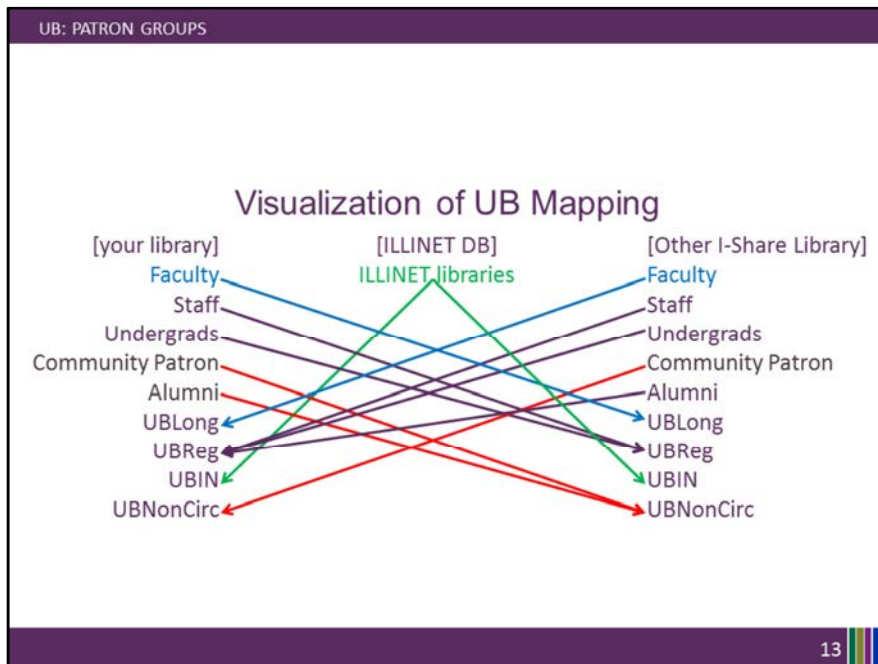
This is just an example- it doesn't reflect any particular I-Share library.

Starting with the sample "your library" on the left.
If a patron from the local patron group, Faculty, visits another I-Share library or requests to borrow an I-Share item through the OPAC, that Faculty member maps to the UBLong patron group at the item's library.
Staff and Undergrads map to the UBReg patron group.
Community Patrons and Alumni have no UB privileges at the library, so they map to UBNonCirc.

Looking at the other I-Share library on the right,
Their Faculty members map to UBLong when they borrow materials from your library.
Their Staff, Undergrads, and Alumni patrons map to UBReg.
Their Community Patrons have no UB privileges so they map to UBNonCirc.

In the middle, you'll notice the [ILLINET DB] for the ILLINET libraries.
The ILLINET DB is managed by CARLI; it contains an institutional patron record for many of the ILLINET libraries within the state.
You'll notice that the ILLINET database has one-directional mapping- those ILLINET

patrons map to the UBIN patron group at all I-Share libraries.
The ILLINET patrons from the CARLI-managed ILLINET database are the ONLY patron group that maps to the UBIN patron group, at any library.
If your patrons wanted to borrow material from an ILLINET library- you'd likely use other means, such as WorldCat, to place the request.

The term ILLINET (and therefore the UBIN patron group) is more complicated to understand than UBLong, UBReg, or the UBNonCirc patron groups.
The next few slides describe more about the ILLINET patron groups.

UB: PATRON GROUPS – ILLINET/UBIN

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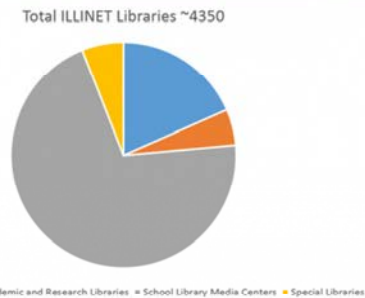
This ILLINET explanation is included in the "Sample Workflows for OCLC Lending" documentation:
https://www.carli.illinois.edu/products-services/i-share/circ/OCLCLendingWorkflows

14

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.

As of 2015, there were about 4,350 ILLINET libraries, counting branch libraries.

UB: PATRON GROUPS- ILLINET/UBIN

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).

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All 134 CARLI libraries ARE ILLINET libraries.

What this means: your libraries are all ILLINET libraries.
The Public Libraries in the state of Illinois are all ILLINET libraries.
The School Libraries in Illinois are all ILLINET libraries.
The Special Libraries in Illinois are all ILLINET libraries.

Of the 134 CARLI member libraries, 86 libraries are members of I-Share.

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.

Resource sharing is very important to Illinois Libraries. Think about those 4,350 some ILLINET libraries overall in the state of Illinois.

ILLINET libraries lend and borrow materials within their own consortia (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.

UB: PATRON GROUPS- ILLINET/UBIN

- 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.

18

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.
This allows the non-I-Share ILLINET libraries to place requests in the I-Share catalog on behalf of their patrons.

These ILLINET libraries have 'institutional level' borrowing privileges in the I-Share catalog.

- 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.

19

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).

UB: PATRON GROUPS- ILLINET/UBIN

- 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

20

I-Share member libraries do NOT have CARLI-maintained ILLINET patron records because patrons from I-Share libraries:
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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.

Remember that I-Share requests placed by ILLINET libraries have an additional processing step in Voyager.
Please review the documentation linked on this slide with your library staff on a regular basis.

UB: PATRON GROUPS- ILLINET/UBIN

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

21

Any questions about how ILLINET libraries (UBIN patron group) fit into I-Share? Remember, UBIN is one of the 4 UB patron groups. UBIN, UBNonCirc, UBReg, and UBLong.

-PAUSE-

Now that ILLINET is defined, let's step back to the broader picture of patron groups in 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.

22

In Voyager, the item's shelving location within your library does not determine its circulation privileges- example- being in the Reference Location is not what makes a book non-circulating in Voyager.

Also, neither the patron's patron group nor the item's item type alone determines circulation privileges; it's the combination of patron group with item type.
These permissions are set in the SysAdmin matrix entries.

Each matrix entry pairs a specific patron group with a specific item type.
This determines the patron group's permissions with that item type.

UB: PATRON GROUPS

- 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.

23

For your own, local patron groups, you set patron permissions by creating matrix entries in Voyager System Administration for each local patron group.
For example, the patron group "Faculty" and the item type of "Book1"- your circulating book type.

Due to the patron group mapping we've already discussed, patron groups from the other I-Share libraries map to the UB patron groups.

For UB Patrons, you set these policies by creating matrix entries for the UBLong, UBReg, UBNonCirc, and UBIN patron groups.

So for example, Faculty from other I-Share libraries map to the UBLong patron group at your library.

UB: PATRON GROUPS

- 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.

24

The mapping to UBLong allows all Faculty, from any I-Share library, to have the same loan period and number of renewals when borrowing material from your library.
The same is in reverse, your faculty will have the same loan period and number of renewals no matter which I-Share library they borrow material from.

The reason that the loan periods will be the same across the consortium for UB patrons, is that many of the settings affecting circulation for the UB Patron groups have been standardized.

Those standardized policies are listed in the document, "Universal Borrowing Policy Standardization" linked on this slide.
The Universal Borrowing Standardized Policies Chart also linked on this slide summarizes many of the settings.
These standard policies allow patrons more seamless I-Share transactions.

CARLI monitors the SysAdmin settings that affect UB transactions for consistency; you may occasionally hear from us regarding an edit that needs to be made for consortial consistency.

UB: PATRON GROUPS

- "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

25

Other I-Share Best Practices documentation helps to standardize practices across the consortium, to the benefit of patrons and library staff.

Please periodically review the "Circulation & Universal Borrowing/Interlibrary Loan" section of the CARLI website for documentation on I-Share Best Practices, such as the Lost Item Procedure and the Damaged Items Procedure.

- 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.

26

So to summarize a common UB question: How does Voyager know which patrons are able to borrow from other I-Share libraries?

These two documents can be helpful.
The first one covers how Voyager looks at SysAdmin in Circulation for the common processes of
1) Library Staff Logging into the Circ client,
2) 2) Scanning a patron barcode, and
3) 3) completing a Charge transaction.

On the next slide I have some page references from the "Voyager System Administration in I-Share Libraries: Circulation and Universal Borrowing guide" for another look at those steps.

UB: PATRON GROUPS

- 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

27

So looking in SysAdmin:

Library staff at the patron's home library assigned a local patron group, which is either UB Eligible, or Ineligible.

CARLI staff have mapped the patron group to one of the UB patron groups at all of the other I-Share libraries.

The other I-Share libraries have created matrix entries for the UB patron groups and their item types.

Voyager checks the matrix entry for lending permissions, and also checks for other patron and item situation such as blocks and limits.

UB: PATRON GROUPS

- 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.

28

Any questions about patron groups before we move deeper into how UB patron records are recorded in your library's database as "Stub Patrons"?

-PAUSE-

- 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

When another I-Share Library's patron performs a transaction at your library, a temporary "stub" patron record for that patron is created (saved to) your library's database.
This record

Is a copy of their basic patron record in their home library's database, not including 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.

30

Stub records are saved in your library's Voyager database for the duration of the transaction

This is different than looking up a "potential patron records" 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.

UB: PATRON GROUPS- STUB RECORDS

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

31

We'll do four examples of searching for patron records, and then review a specific stub record.

- **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.

32

In this first example, we will search for the stub patron records for the ILLINET libraries who have a current transaction at our example library.

The steps we will follow are to search for the patron record by name, set our library as the drop-down menu, and then enter a last name of ILLINET.
You can replicate these search steps in your own Circulation client.
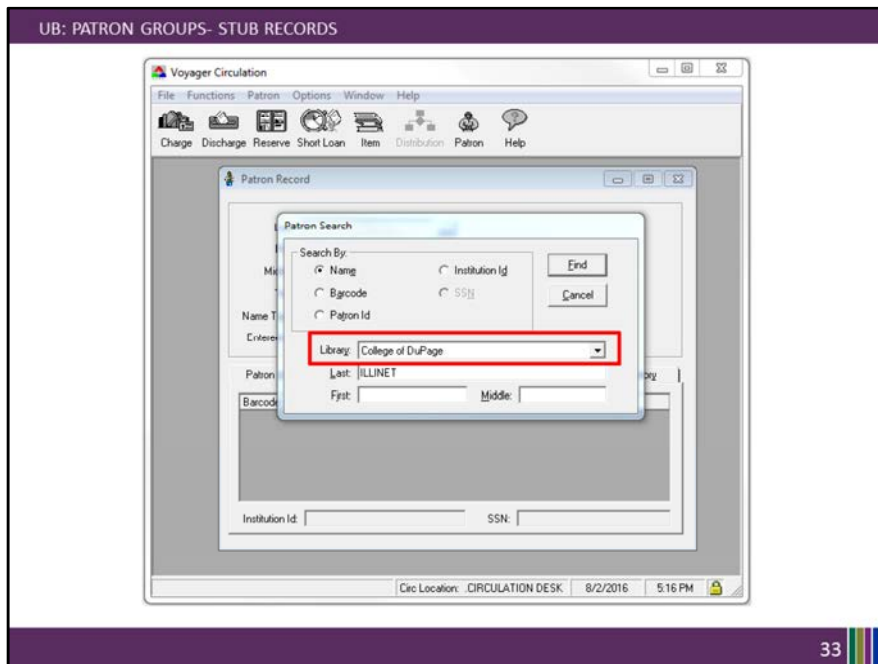
In this example, I'm the College of DuPage library.
You can see that I've chosen my Library to be in the drop-down which is the default when searching by patron name,
and I've typed the last name of ILLINET into the Last name search box.
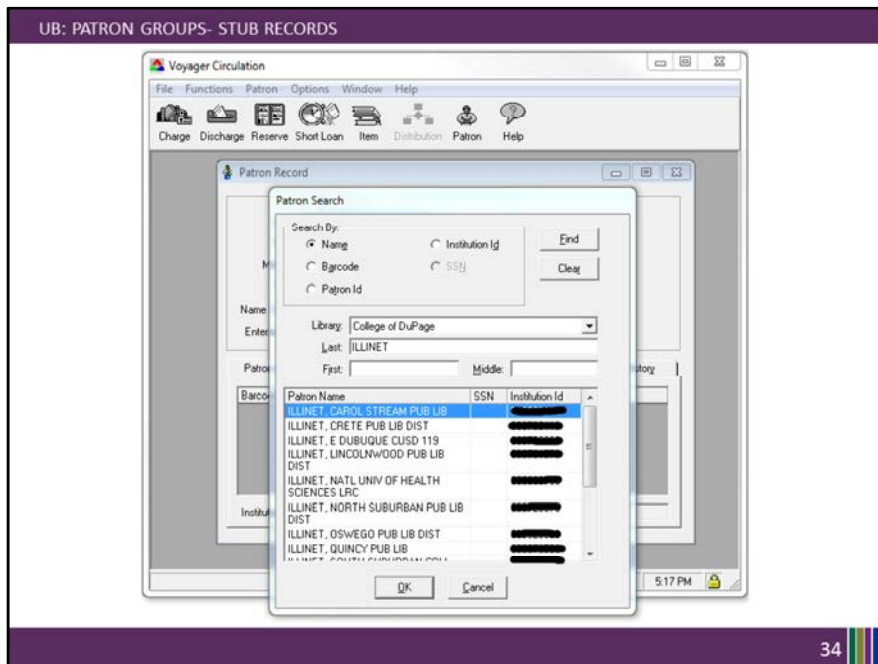
When I search, my results list only the records with ILLINET as the last name, which are in my library's database.

These STUB records are saved in my library's database because these ILLINET libraries have a current transaction at my library, the College of DuPage.
It's only about 10 patron records.

The list is alphabetical- the first result from my search has a first name starting with "C".

Again, these records will automatically be deleted when they are no longer in use.

■ 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.

35

In this second example, we will search for the full list of ILLINET libraries whose patron records are available in the ILLINET database managed by CARLI.

The steps we will follow are to search for the patron record by name, set the ILLINET Libraries option in the drop-down menu, and then enter a last name of ILLINET.
You can replicate these search steps in your own Circulation client.
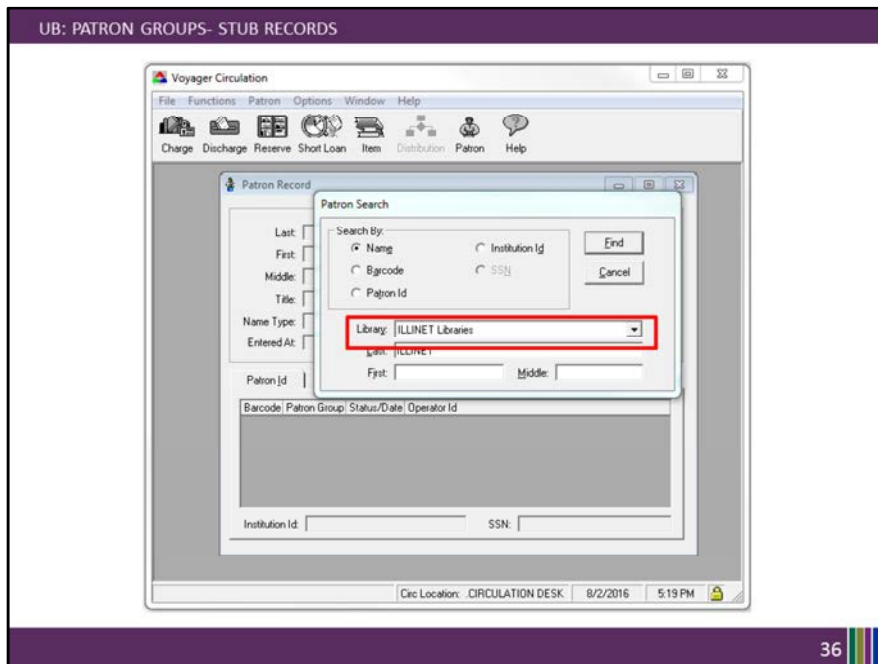
For this second scenario, I'm still the College of DuPage library, but now I've selected the library as ILLINET libraries.
"ILLINET libraries" is the home library of the patron I'm searching for.
Again I enter a last name of ILLINET and search.
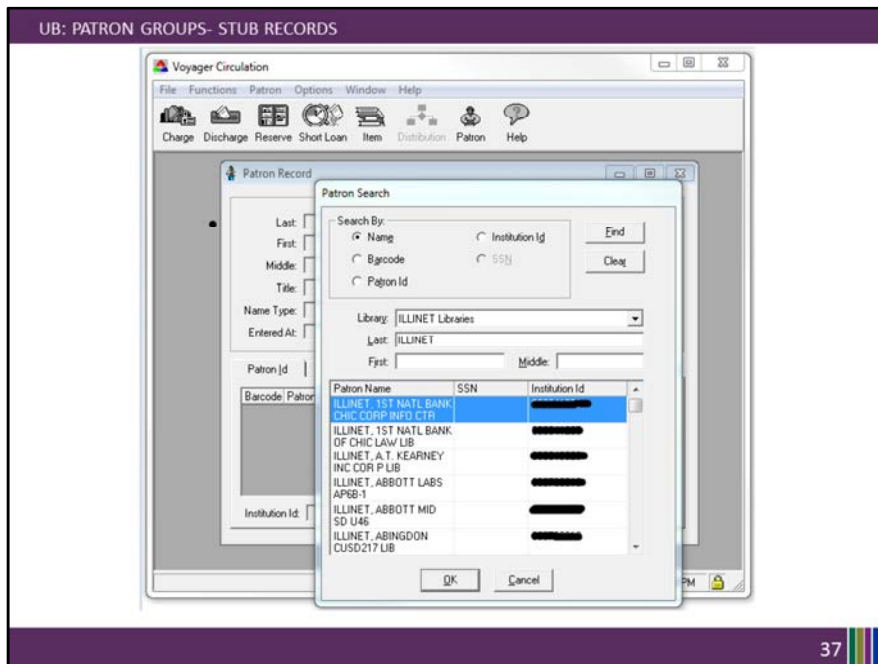
Now, my results show me all of the records with a last name of ILLINET from the ILLINET database (that database maintained by CARLI).
There are a few thousand records in this list.

The list is alphabetical- notice our list of libraries starts with libraries whose names begin with a digit, and then moves into the early A's.

These are the patron records in the ILLINET libraries database, with 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.

38

In this third searching example, we will search for patrons with a last name of Smith who are either your library's own patrons, or the stub records of I-Share patrons with a current transaction at our library.

The steps we will follow are to search for the patron record by name, set our library as the drop-down menu, and then enter a last name of Smith.
You can replicate these search steps in your own Circulation client.
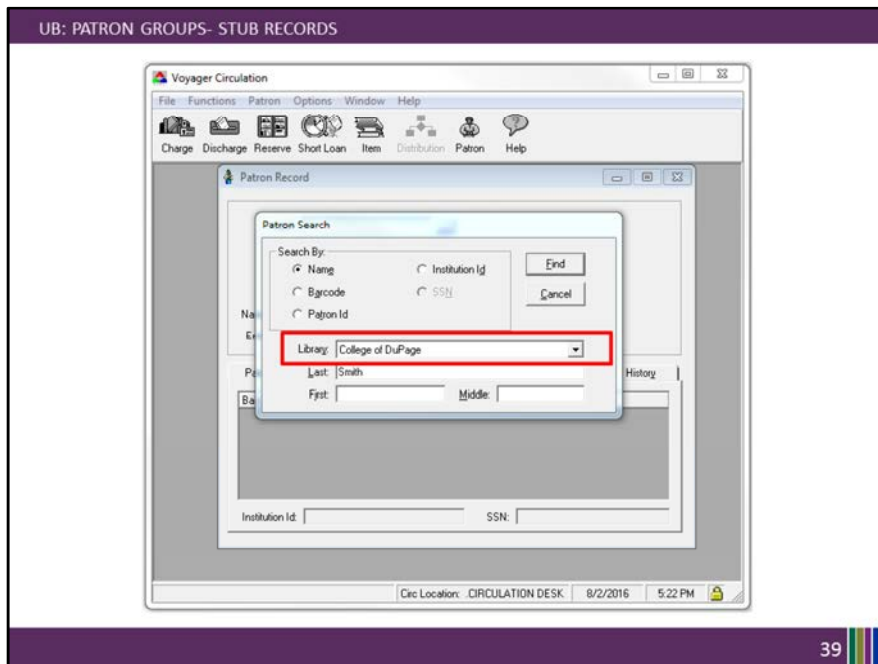
In this example, I'm the College of DuPage library.
You can see that I've chosen my Library to be in the drop-down (default when search by patron name),
and I've typed the last name of Smith into the Last name search box.
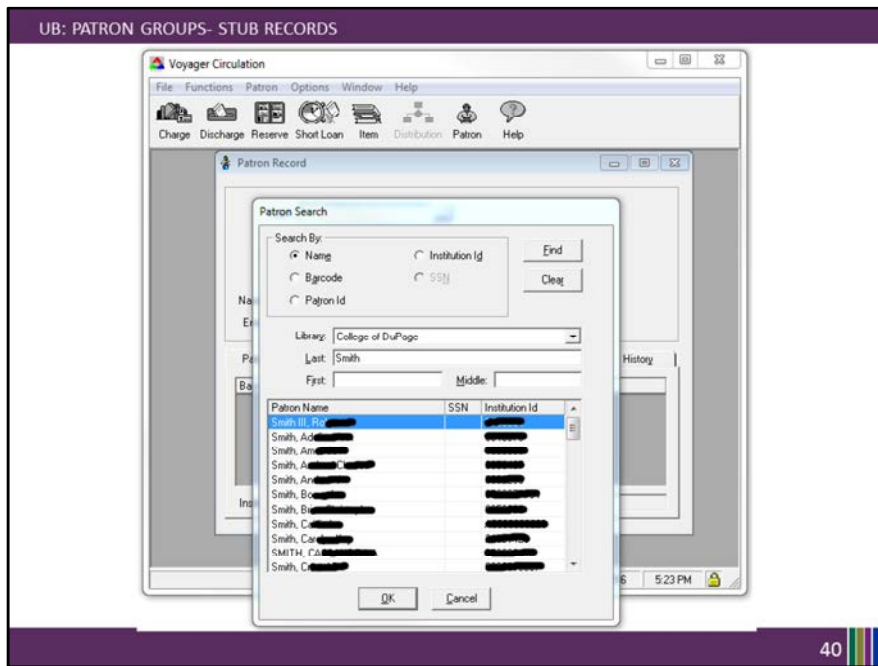
These are either my library's home patrons with a last name of Smith, OR an I-Share patron with a current transaction at my library.
The INSTITUTION ID column helps me to determine which (if my library has a consistent pattern that I recognize).

■ 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.

41

For the fourth example, we will search for a list of patrons whose last name is Smith in another I-Share library's database.

The steps we will follow are to search for the patron record by name, choose another library in the drop-down menu, and then enter a last name of Smith.
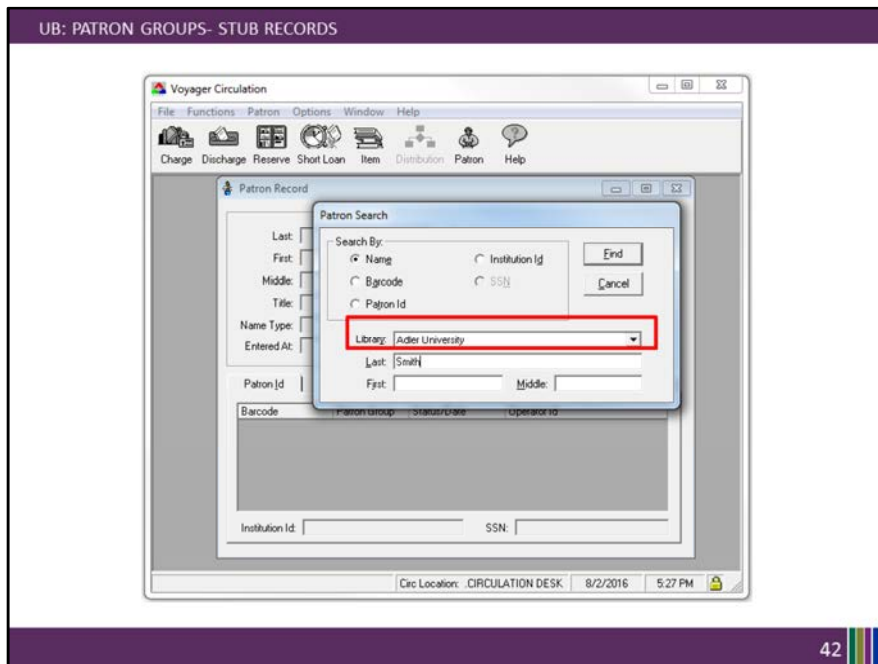
For this second scenario, I'm still the College of DuPage library, but now I've selected the library as Adler University.
Again I enter a last name of Smith and search.
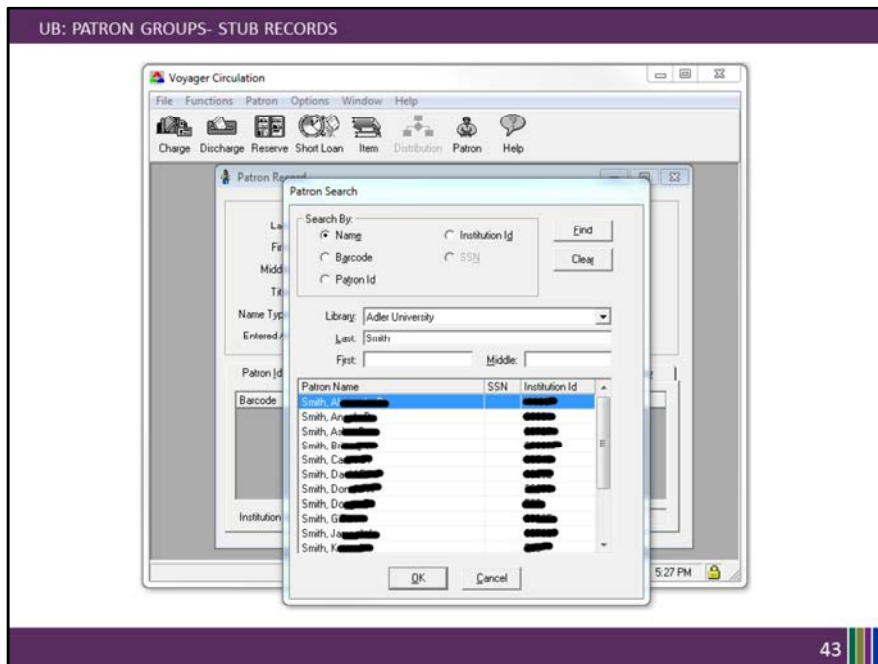
Now, my results show me all of the Adler patron records with a last name of Smith.

When searching for a patron from another I-Share library by name, you may need to select their home library from the drop down menu to find their patron record.

UB: PATRON GROUPS- STUB RECORDS

- 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.

44
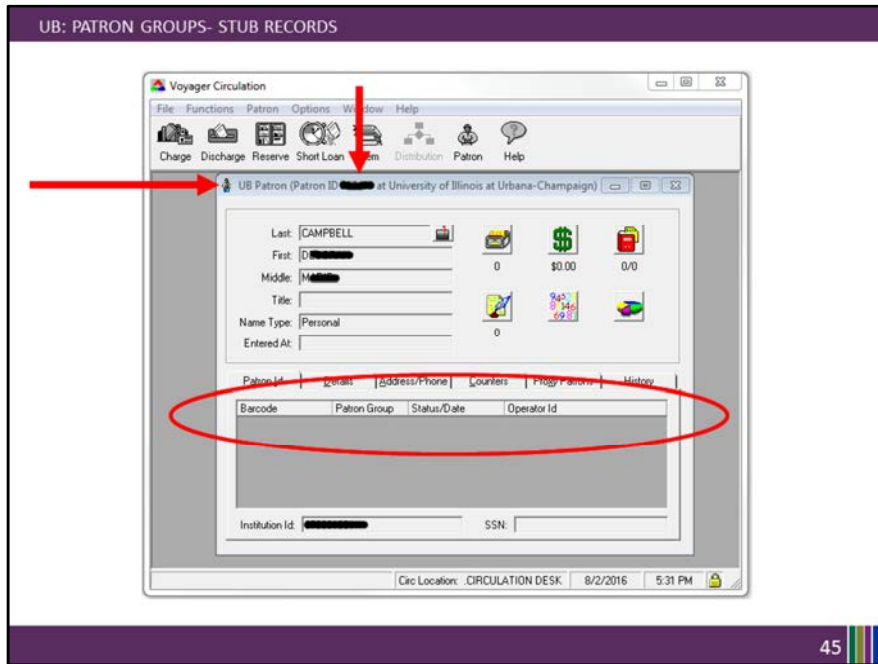
This screenshot shows a potential patron record- a stub not yet saved to your library's database, as found from searching examples 2 & 4.

Notice the description in the top of the patron window where it says UB Patron (Patron ID # at University of Illinois at Urbana-Champaign).

The patron's patron ID number at UIUC is their Voyager assigned PATRON_ID in the UIU database.

Notice that while the Institution ID field is filled in for the patron, the barcode, patron group, barcode status, and barcode update operator area is blank.

Keep these features in mind as we look at the next example.
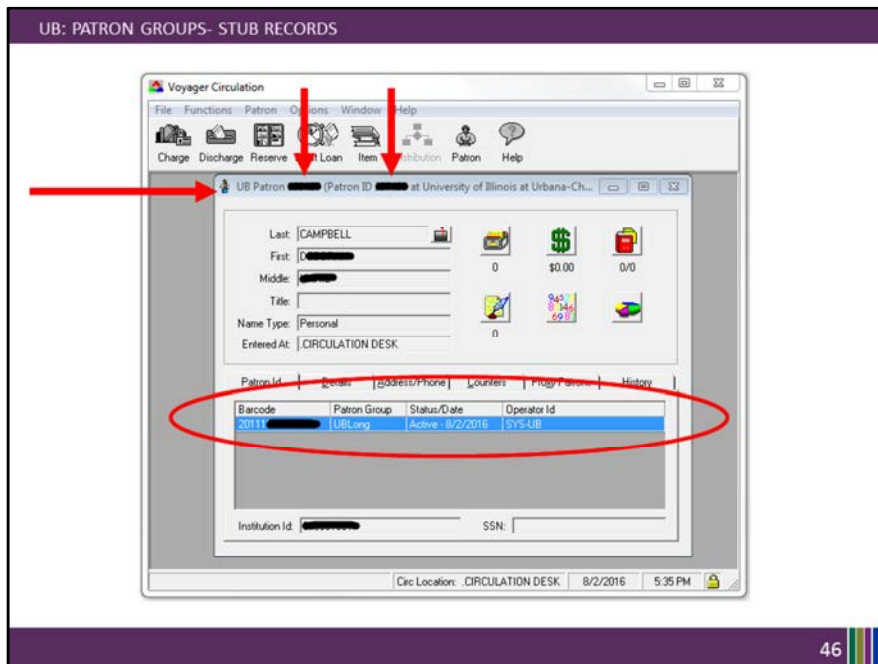
This screenshot shows that same stub record after it has been saved to your library's database, as found from searching examples 1 & 3.

Notice the description in the top of the patron window where it says UB Patron # (Patron ID # at University of Illinois at Urbana-Champaign).

The UB Patron is the patron's Voyager patron ID as saved in your library's database. The second Patron ID number, the patron ID number at UIUC is their Voyager assigned PATRON_ID in the UIU database.

Having that new UB Patron # number is a sign that this is a stub record saved to your database.
Each time Voyager saves a new stub record to your database, it is assigned the next sequentially higher Voayger Patron ID number.

Notice now that the barcode, patron group, barcode status, and barcode update operator area is filled in.
That the Operator ID who updated the barcode is SYS-UB is also a clue that this is a stub record for a UB patron.

--Pause--

UB: BARCODE LOOKUP

- 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

48

Voyager has a feature called "barcode lookup" which compares the prefix of a patron or item barcode to a list of those known for each I-Share library.
When a library staff member performs a charge or discharge transaction:
if the barcode has a unique prefix, Voyager automatically selects the associated library.
if the barcode does not have a unique prefix, Voyager prompts the library staff member to select the associated library from a drop-down menu.
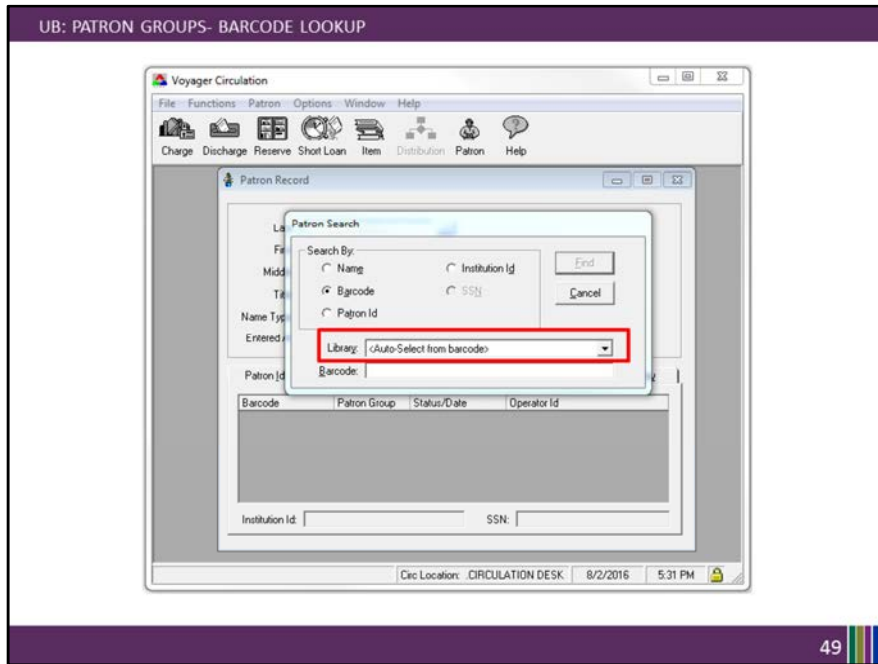
Here's the barcode look-up functionality in the patron barcode search- notice that the drop down menu for Library says "Auto Select from barcode".
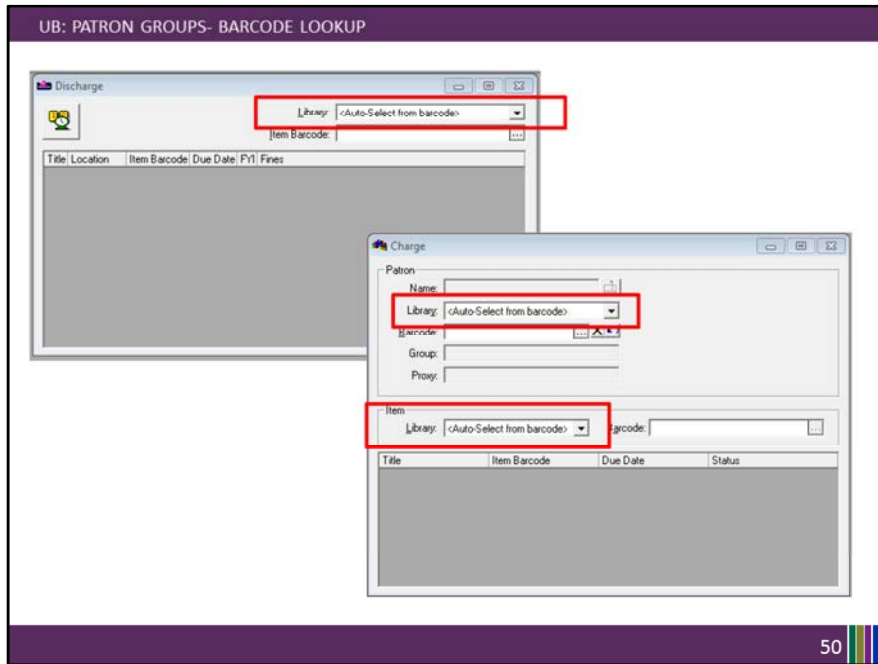
Here is that same wording, "Auto Select from barcode" where located in both the Discharge and Charge Screens.

■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.

51

Your library's Circ Client will display only a limited amount of information about UB transactions.

From your library's item record: you can see the patron information on a charged item, or a pending call slip for the item.

From your library's patron record: you can see information about pending or available on hold UB items.

From the UB stub patron records: you can see charge information, and fine/fee information for that UB patron's transactions at your library.

Circulation 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.

UNIVERSAL BORROWING

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

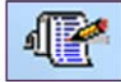**CALL SLIPS (LOCAL AND UB)**
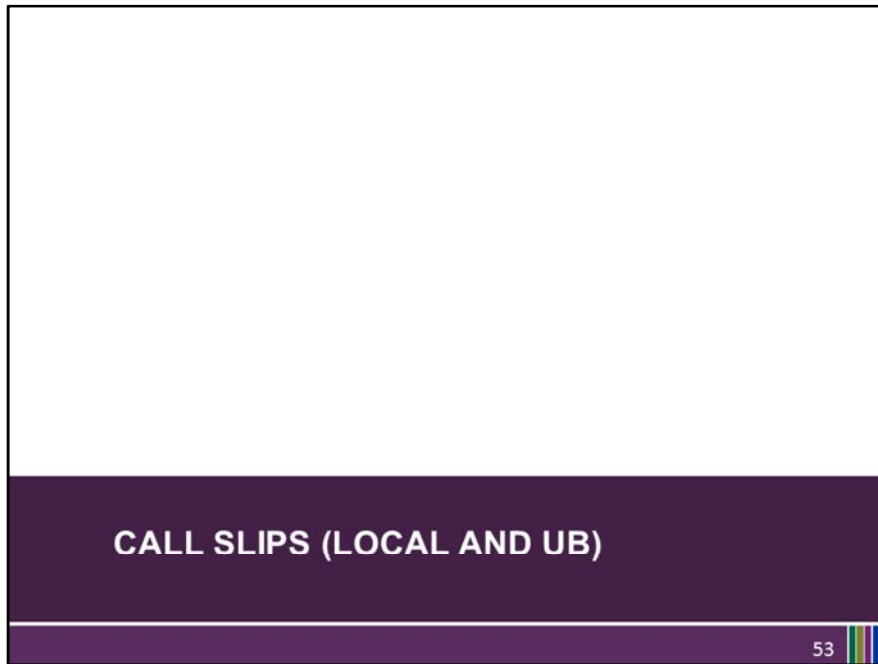
Let's move on now from the background on UB to the call slip client.

CALL SLIP: OVERVIEW

- **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.

54

Call Slip Client is also called the Call Slip Daemon in documentation- a Daemon is software that sits as an intermediate between other pieces of software- so Call Slip connects the OPAC with Circulation for the processing of patron requests.

The call slip client is used for processing both UB call slips, and also local call slips if enabled at your library.

The Call Slip Queues are established based on item shelving location, not by request type- so the UB and local call slips are interfiled.
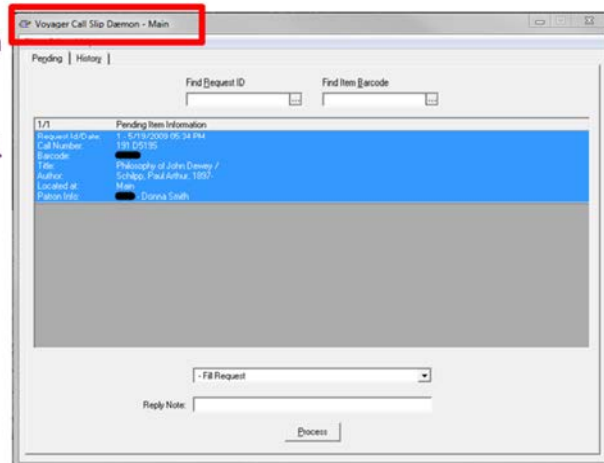
They are where the requests for your library's items are received and processed by library staff.

Your library may have one or multiple queues.

Each call slip queue is filled with its own list of requests.

The requests are forwarded to a queue based on the call slip "Rules" created in SysAdmin.

CALL SLIP: SYSADMIN SETTINGS

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

56

This screenshot shows the Voyager SysAdmin, Call Slip section in an example database.

The link at the bottom of the slide will take you to documentation explaining the Call Slip client setup portion in SysAdmin.
Since your call slip queues are already established, you will not need to make edits to the section very often.

Please contact the CARLI office in advance to discuss any wishes to add a new call slip queue.
We will also send out reminders about the edits that need to be made for library holiday closures.

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 requests will go to that queue by default. My best advice about call slip rules is to keep them simple.

CALL SLIP: LOCAL CALL SLIPS

- 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

58

Local call slips are your patrons requesting your items for pickup at either your library or at another I-Share Library.

The documentation linked on this screen can be helpful for any library considering enabling local call slip for your library's local patrons.

CALL SLIP: LOCAL CALL SLIPS

■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.

59

Regarding Local Call Slip Requests:

IF your library has enabled local call slip requests, you can determine whether your 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.

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

It then becomes a UB request.

Note that promoted is in bold; we'll talk about this later.

CALL SLIP: UB CALL SLIPS

- 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.

60

Again, note that promoted is in bold.

TYPES OF PRINTED SLIPS: REQUEST / ROUTE / HOLD

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.

61

This slide discusses some of the documentation printed by Voyager as a part of the Call Slip and UB process.

The Call Slip (aka Request slip) prints from the call slip client; it's used by library staff to retrieve the item and process the request.

Route slips 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.

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.

62

Hold Slips print from the Circulation client.

The Hold Slip is attached to the item and the item is placed on a Hold Shelf until either:

the item is picked up by the patron

or the hold expires and the item is returned to the item's home library and shelving/storage location.

TYPES OF PRINTED SLIPS: REQUEST / ROUTE / HOLD

- **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.

63

Slips that print from the Call Slip Daemon are formatted by the Callslip.ini file

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.

Both slips can be customized for receipt printer printing.

- Any questions about the basic setup of the call slip client?
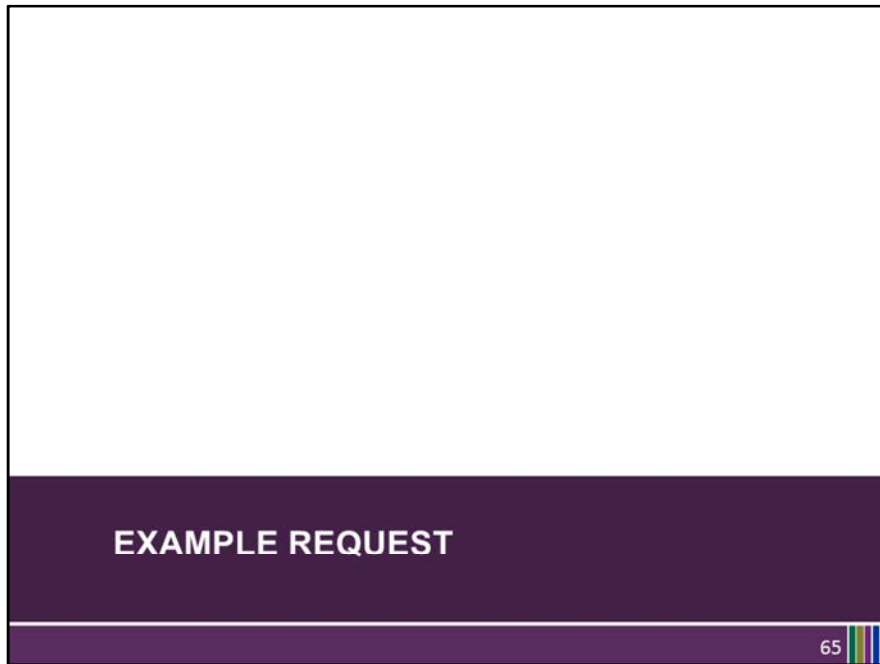
EXAMPLE REQUEST

We'll now look at an example of a typical request- from start to finish.

- **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.

66

- **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

67

■ 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

CALL SLIP CLIENT

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

70

All library staff who work with Call Slip and resource sharing at your library should be familiar with the documentation on this slide.

The first document, Best Practices How to use the Call Slip Client is the step-by-step daily workflow for processing call slip requests.

The second document, Best Practices: Processing ILLINET Requests, includes the additional steps needed for processing those UBIN/ILLINET requests we discussed earlier.

Any questions about call slips?
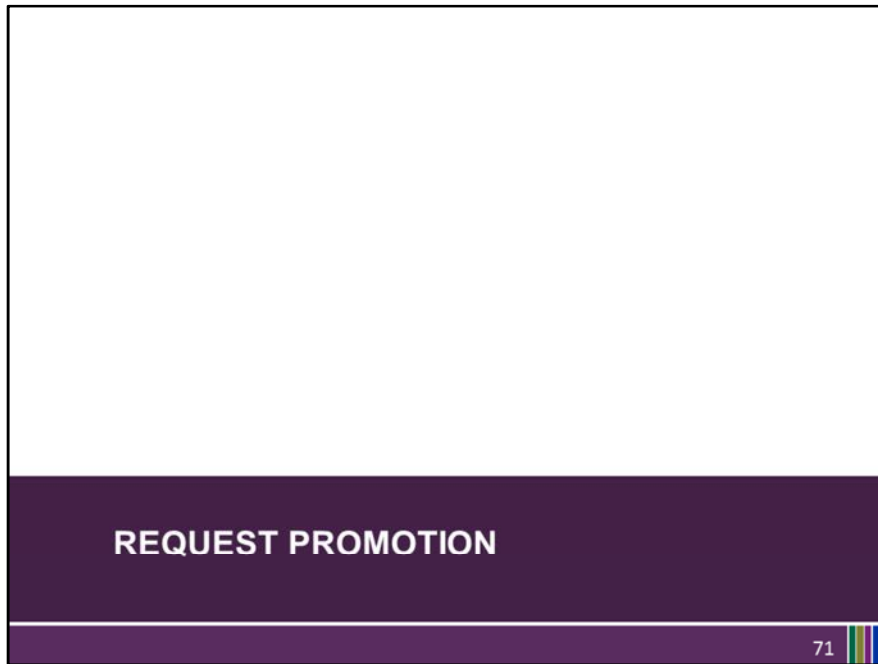
REQUEST PROMOTION

Our last topic in this webinar is Request Promotion.

Request Promotion is the process by which a call slip that is unfilled by the first library, "where the call slip was a "Direct Request",

is sent along to other I-Share libraries to be possibly filled.

"Request Promotion" is server functionality that is a part of Voyager.

Let's walk through an example scenario.

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
```

72

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.

73

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.

74

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.
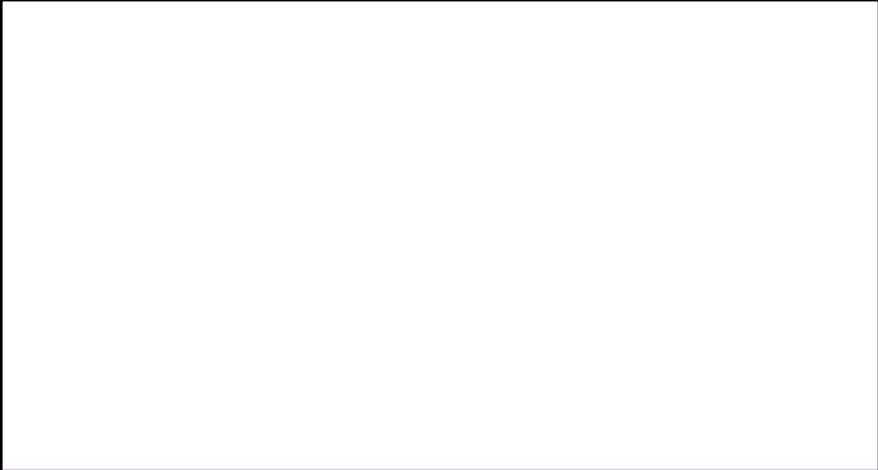
76

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?

- After webinar send questions 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

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