I-SHARE UNIVERSAL BORROWING PERSPECTIVES: WEBVOYAGE AND VUFIND

CALL SLIP AND UNIVERSAL BORROWING

Voyager software distinguishes between call slip and Universal Borrowing requests. In a call slip request the patron, the item location, and the pick-up location are all associated with the same institution. In a Universal Borrowing (UB) request at least one of the institutions is different from the other two. UB requests must be placed in the I-Share Universal Catalog (UC). Call slip requests must be placed in the local catalog.

WEBVOYAGE

Many I-Share libraries (in support of closed-stack paging, commuting patrons, etc.) allow their patrons to place call slip requests in their local catalog. Some I-Share libraries, however, have decided not to page their materials for their own patrons. Before Voyager 6.1, patrons could use the Universal Catalog to request that items from their home library be held at their home library for pick-up. This meant that the UC was an alternative starting place, both for patrons whose home libraries would accept such a request and for patrons whose libraries would not. Since Voyager 6.1, such is no longer the case. Patrons whose libraries support call slip requests must place those requests in their local catalog. Patrons whose libraries do not support call slip requests can no longer use the Universal Catalog to circumvent (whether deliberately or inadvertently) their library's policy.

Users can begin a request process in the UC only to be thwarted, mid-way through the process, because the selected item happens to be from their home library. Therefore, CARLI staff have developed a way (described below) to redirect users from the Universal Catalog to their local catalog automatically (if the local library supports call slip requests), so that users can proceed with their requests without needing to start completely over. Nevertheless, libraries may want to encourage their users to begin catalog search sessions in their local catalog. Where call slip requests are allowed, users can request items immediately. Where call slip requests are not allowed, users can follow the "Repeat search in the I-Share catalog" link, and then place a Universal Borrowing request.

THE A, B, C AND D OF IT IN WEBVOYAGE

To explain requesting scenarios we will use the following definitions:

- Call Slip   A local requesting transaction in which the patron's home library, the item's owning library, and the pick-up location library are all the same institution

- Universal Borrowing   A requesting transaction that always involves more than one institution
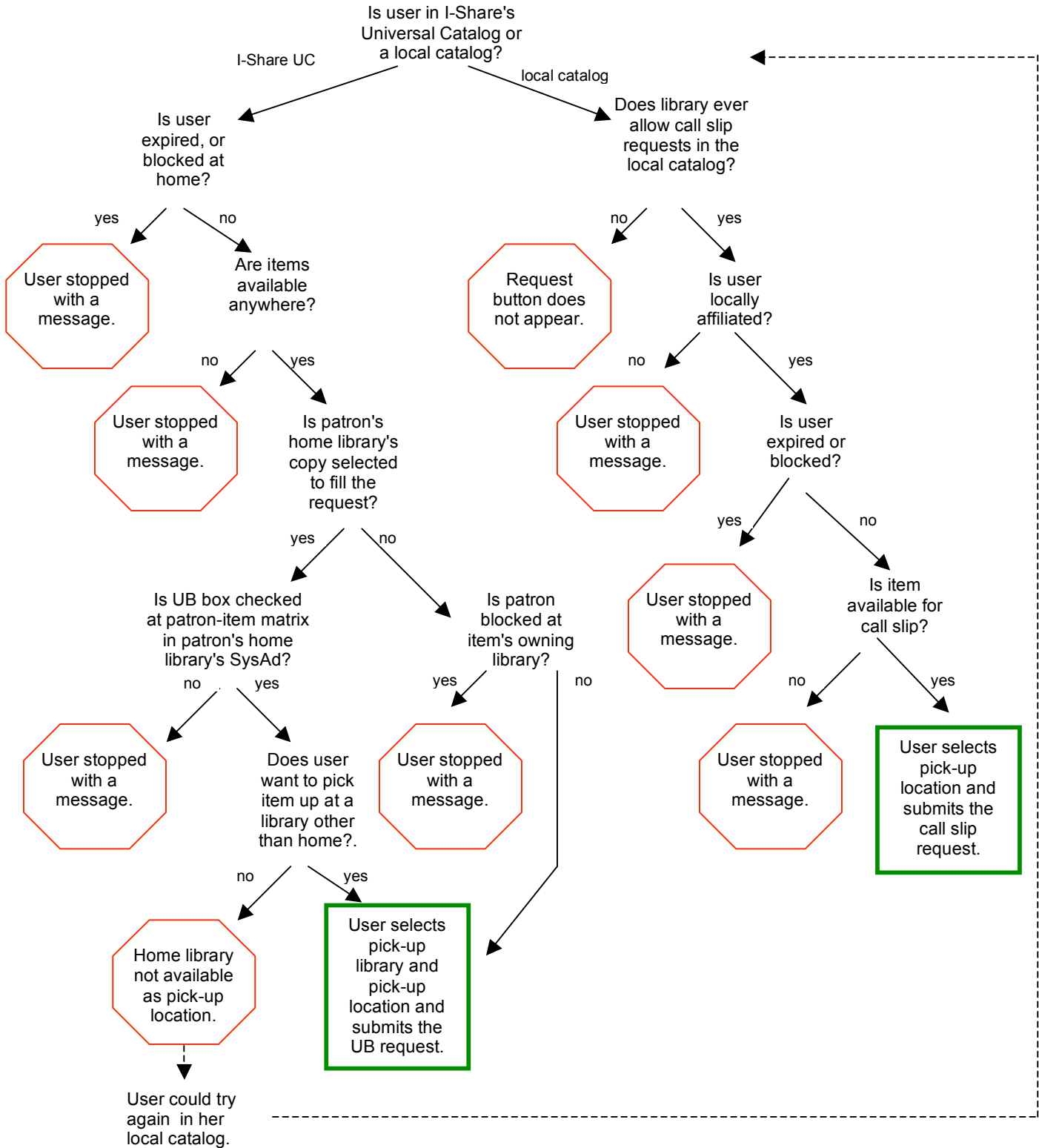
The chart below illustrates the request scenarios possible in WebVoyage. Although there are many I-Share libraries, we need to use just four libraries to illustrate all possible request scenarios.

Patron's Home Library	For purposes of the chart, always Library A
Item's Owning Library	Either the patron's home library, Library A; or another library, Library B
Pick-up Location Library	Can be the patron's home library, Library A; the item's owning library, Library A or B; or a third library, Library C
Local Catalog Instance	Can be the catalog of Library A, Library B, Library C, or even Library D (that is, the catalog of the patron's home library; the catalog of the item's owning library, if that is different; the catalog of the pick-up location library, if that is different; or even the catalog of yet another I-Share library)

The table below describes each potential requesting scenario.

Patron's Home Library	Item's Owning Library	Pick-up Location Library	Request Scenario Works in Library A's Local Catalog?	Request Scenario Works in Library B's, C's, or D's Local Catalog?	Request Scenario Works in I-Share/the UC?
A	A	A	Yes, if call slip is allowed, patron is valid, and item is available.	No. Only locally-affiliated patrons can place call slip requests in any I-Share library's local catalog.	No. Library A is not a valid pick-up location.
A	A	B	No. Only local pick-up is offered.		Yes, if patron is valid, item is available, and UB box is checked in Library A's SysAd at patron group-item type matrix.
A	B	A	No. Only local items are offered.		Yes, if patron is valid, item is available, and patron group is mapped to a UB patron group in Library B's SysAd.
A	B	B			
A	B	C			

The flowchart below is another view of the same set of concepts. It illustrates both call slip (in the local catalog) and UB (in the Universal Catalog) request logic.

Is user in I-Share's Universal Catalog or a local catalog?

I-Share UC

local catalog

Is user expired, or blocked at home?

yes

no

User stopped with a message.

Are items available anywhere?

no

yes

User stopped with a message.

Is patron's home library's copy selected to fill the request?

yes

no

Is UB box checked at patron-item matrix in patron's home library's SysAd?

no

yes

User stopped with a message.

Does user want to pick item up at a library other than home?.

no

yes

Home library not available as pick-up location.

User could try again in her local catalog.

User selects pick-up library and pick-up location and submits the UB request.

Is patron blocked at item's owning library?

yes

no

User stopped with a message.

Does library ever allow call slip requests in the local catalog?

no

yes

Request button does not appear.

Is user locally affiliated?

no

yes

User stopped with a message.

Is user expired or blocked?

yes

no

User stopped with a message.

Is item available for call slip?

no

yes

User stopped with a message.

User selects pick-up location and submits the call slip request.

WHAT USERS SEE IN WEBVOYAGE CLASSIC

In WebVoyage Classic the UB request form contains the following instructional text at the top:

Instructions:	• Select a pick-up location, re-enter your borrower ID, then click "Submit." • Use this I-Share form to request materials from libraries other than your own (or, materials from your own library that you want to pick up somewhere else). • If you want to request materials from your own library and pick them up there, it may be possible to place your requests in your own library's catalog.

Most UB requests are ABA scenarios (patron from Library A, item from Library B, pick-up location at Library A).

The AAA and AAB scenarios happen in the UC either when a UB-enabled user from Library A requests a title that is held by Library A alone, or when a UB-enabled user from Library A requests a title that is held by Library A among other libraries *and* Voyager randomly selects Library A to fill the request. If the user intends to pick up an item that is owned by her home library at a library other than her own, this is an AAB scenario, and supported in the UC.

If the user wants to pick up her home library's item *at* her home library, however, that is an AAA-scenario request. She will need to place her a call slip request in her library's local catalog instead.

Note that in an ABA scenario (that is, in a scenario when Voyager selects another library's item to fill the patron's request) the patron's home library is offered as the default pick-up location. Unless the user's intention is actually to pick the item up at another library, in an ABB or ABC scenario (patron from Library A, item from Library B, pick-up location at Library B or C), she won't have to change the selection in the drop-down list of libraries.

Only users in AAA and AAB scenarios will see the text "*Please Select Library*" when they get to the UB request form. If a user leaves the pick-up library selection at this setting, the call slip request will not process correctly. To avoid "database error" messages and unprocessable requests, CARLI has added a check on the pick-up library. If the user fails to select a valid pick-up library before she clicks "Submit," she will see the message "Please choose a Pick-up Library."

Because it will be frustrating to users who want to pick up an item at their home library to get so far into a request in the UC only to learn they cannot proceed, some libraries may decide to disallow UB requests by their own patrons on their own items. Be aware, however, that disallowing UB requests of a library's own items by its own patrons eliminates the supported AAB scenario as well as the unsupported AAA scenario.

To disallow UB requests by local patrons for local items, open the Voyager System Administration client and go to Circulation➔Policy Definitions➔Edit (for each Circulation Group) ➔Matrix➔Modify (for each Patron Group-Item Type combination) and uncheck the UB box in the upper right corner. See the illustration below.

If the library has unchecked the UB box for the Patron Group-Item Type combination that applies to a user's request, and if libraries other than the patron's home library have copies available, Voyager will randomly select one of those other libraries' items to fill the request. If the UB box is unchecked and the patron's home library is the only library with an available copy, Voyager will display the "no items available" message and prevent the user from getting as far as the UB request form.

SUMMARY OF CONSIDERATIONS FOR POSSIBLE SYSTEM ADMINISTRATION CHANGES

If the UB checkbox is CHECKED:

Advantage:

- Users are able to place requests in the AAB scenario. The AAB scenario may be especially helpful to commuters.

Drawback:

- Universal Catalog users will sometimes stumble into the AAA scenario, and not learn their request cannot be completed in the Universal Catalog until they are almost through filling out the UB request form. Users affiliated with libraries with large numbers of uniquely-held titles are the users most likely to encounter the AAA scenario.

If the UB checkbox is UNCHECKED:

Advantage:

- Users will be spared the frustration of reaching the UB request form only to discover their AAA scenario request cannot be completed in the Universal Catalog.

Drawbacks:

- Commuting users lose the opportunity to request their own library's items and pick them up somewhere else. The AAB request scenario cannot be supported in the local catalog.
- Also, users miss the opportunity to be guided to alternative, requestable titles, through the CARLI workaround described below, and must find their own alternative strategies.

CARLI'S WORKAROUND FOR AAA-SCENARIO REQUESTS IN I-SHARE

CARLI staff have developed a local enhancement to WebVoyage that works around Voyager's lack of support for "AAA-scenario" requests in the UC. Without CARLI's workaround, when the user requests a title and Voyager happens to identify the user's home library's copy of the title to fill the request, the user is unable to select her home library as the pick-up library: her home library does not appear in the list of possible pick-up libraries. Because users do not learn they will be unable to complete their AAA-scenario requests in I-Share until they are most of the way through the request process, and because without CARLI's workaround I-Share does not clearly present service alternatives to the users, users were understandably frustrated.

When Voyager selects the patron's home library's copy of a title to fill a request, CARLI's WebVoyage enhancement re-inserts the patron's home library into the list of possible pick-up libraries. This allows the user to signal her desire for an AAA-scenario (as opposed to AAB-scenario) request. In an AAA-scenario request, if the patron's home library supports call slip requests in its local catalog, CARLI's WebVoyage enhancement will redirect the user from the UB Request Form in I-Share to her local library catalog, where she will be able to complete her request; if the patron's home library does not support call slip requests in its local catalog, CARLI's WebVoyage enhancement will offer the user other alternatives.

Figure 1: The user is in the I-Share Universal Catalog. She has requested a title, and the copy identified to fill her request happens to come from her home library. "* Please Select Library *" was selected by default in the dropdown list of pick-up libraries on the UB request form. The user has selected her home library. Immediately the pick-up library list reverts to "Please Select…" and an alert box displays. Because the library in question supports call slip requests in its local catalog, the alert says, "You have selected to pick up this item, which is owned by your home library, *at* your home library. To accomplish this, you must request this item in your home library's catalog."

Figure 2: The user clicked on the "Request this item in your home library's catalog" button, from the alert box in the UB request form in I-Share. Automatically the user has been redirected to her local catalog, and taken to the default single-record View page for the title she was trying to request. The user may now click the Request button in her local catalog, sign in again, and proceed with her request. If she changes her mind she can press her browser's "Back" button to return to her I-Share catalog session.

Figure 3: The user is in the I-Share Universal Catalog. She has requested a title, and the copy identified to fill her request happens to come from her home library. "* Please Select Library *" was selected by default in the dropdown list of pick-up libraries on the UB request form. The user

has selected her home library. Immediately the pick-up library list reverts to "Please Select…" and an alert box displays. Because the library in question does not support call slip requests in its local catalog, the alert says, "You have asked to pick up this item, which is owned by your home library, *at* your home library. Your home library does not allow this type of request. You may visit your library in person and retrieve this item yourself, or select another pick-up library and proceed with your request. Alternatively, to request a title that can be delivered for you to pick up at your home library, you must find a title that is not currently available at your home library. Click the 'Return To Searching' button below to try I-Share's 'More Like This' feature, as a way to find other titles that meet your needs."

Figure 4: The user clicked on the "Return to Searching" button, from the alert box in the UB request form in I-Share. Automatically the user has been taken to I-Share's "More Like This" single-record view page for the title she was trying to request. The user may be able to discover another edition of the title, or another title under the same subject heading, that she will be able to request through I-Share and have delivered to her home library for pick-up.

VUFIND

VuFind is an alternative interface to the I-Share catalog, offering users what may be a better way to discover library resources. The VuFind interface searches essentially the same data as the WebVoyage interface. In VuFind, just as in WebVoyage, users may check item availability and place requests. Library policy on whether to accept call slip requests affects VuFind just as it does WebVoyage. After they log in to VuFind, users affiliated with I-Share libraries that do not support call slip requests will no longer be presented with the "Request" option on records that belong to their home library.

VuFind searches across each of the I-Share libraries' local catalogs individually. It does not search a deduplicated union catalog. If multiple libraries own exactly the same title, users will see that title repeated on the Results page for each owning library. This affects how users place requests for titles they find. Currently, and unlike in the WebVoyage Classic interface, requests in VuFind are for the particular library's copy, not for "any available copy" of a title. It is up to the user to choose the lending library—the interface does not "randomize" the choice.

Once the request is placed however, the processing of the request is the same as when the request is placed via WebVoyage. If the user requests an item from a library other than her home library,

the request is processed as a UB request. If the user requests an item from her home library, the request is processed as a call slip request. (In either case, if for some reason the first-selected library cannot fill the request, Voyager will attempt to "promote" the request to another lending library, just as it would if the request had been placed in WebVoyage.)

For more information about the VuFind interface to I-Share, see:
http://www.carli.illinois.edu/mem-prod/I-Share/opac/vufind-faq.html