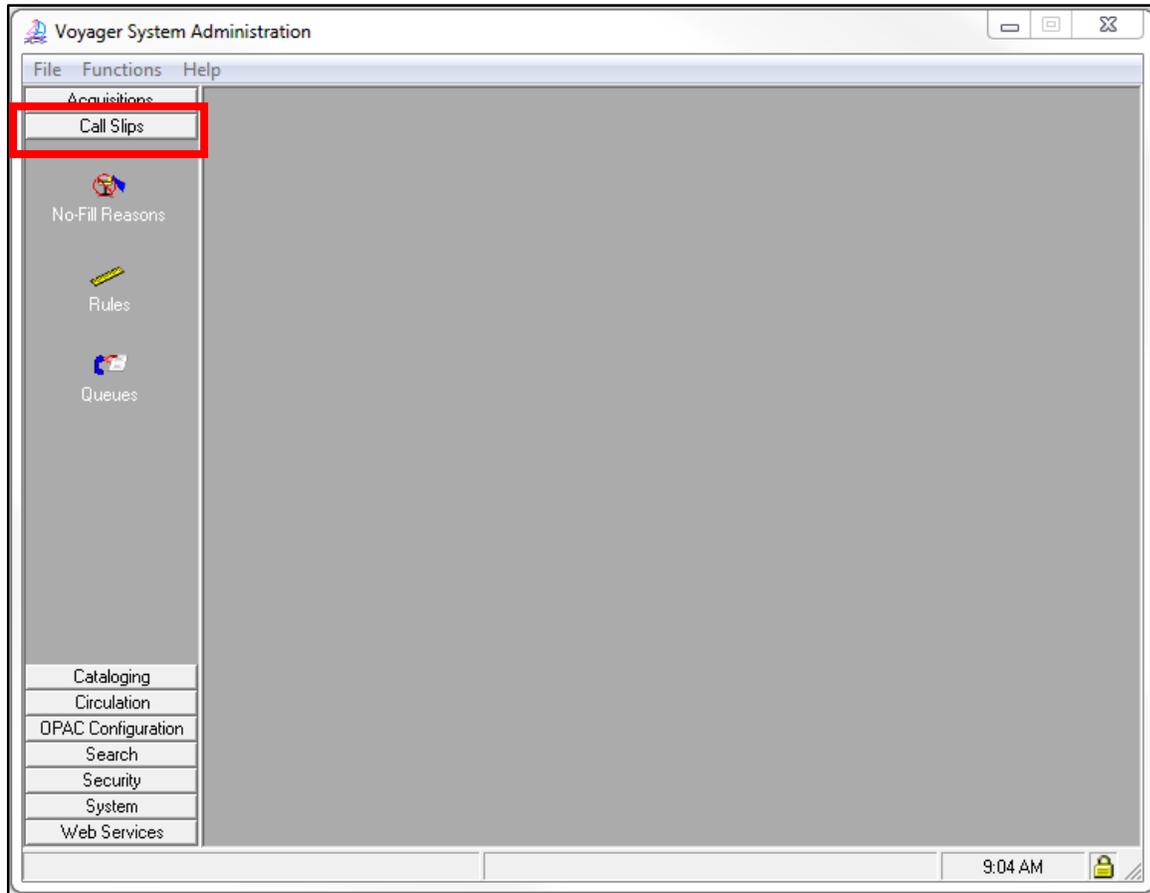


VOYAGER SYSTEM ADMINISTRATION IN I-SHARE LIBRARIES

PART 4: CALL SLIPS



Call Slip System Administration Workspace

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

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I. Introduction

This chapter of the I-Share System Administration document is a concise and annotated supplement to the Call Slip portion of the full Voyager 9.1.1 System Administration User's Guide. Use this document to learn the I-Share consortial requirements and recommendations for the settings in the Call Slip portion of Voyager System Administration. The Voyager 9.1.1 System Administration User's Guide contains additional information and explanations; consult it for further detail.

NOTE: Screen shots that appear throughout this document come from a variety of I-Share databases. The settings do not always represent the values your library should be using for your policies.

Page references refer to the *Voyager® 9.1.1 System Administration User's Guide*.

http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_System_Admin_9_1_1.pdf

II. Overview

A Call Slip queue is a list that holds pending requests made by patrons for your library's items.

- You view, sort, and process these requests using the Voyager Call Slip Dæmon (client).

If your library has more than one Circulation HAPPENING Location defined in your library's System Administration settings, you may want to set up a separate Call Slip queue for each of those HAPPENING Locations, especially if those HAPPENING locations are in separate buildings or are managed by separate staff.

Based on the settings you enter within this section of SysAdmin, the Call Slip client will automatically:

- Receive each request.
- Identify the storage/shelving location for the item requested.
- Determine which Call Slip Queue should receive the request based on the item's location.
- Assign the request in the correct Call Slip queue.

You must set up Call Slip, otherwise your library will not receive requests from the other libraries' patrons via Universal Borrowing (UB).

- Whether or not your library allows local call slip (aka, "paging", which is when your patrons are allowed to request your library's items through the OPAC), the setup within this section for Call Slip is the same.
 - Local and UB patron requests are interfiled in the queues.
- Local Call Slip uses a combination of settings from Part 3: Circ/UB documentation and Part 5: OPAC. Refer to section "VI. Additional I-Share Documentation on Call Slips" for more information.
 - The circulation matrix can be configured to prevent local call slips and UB requests (with the exception of promoted requests) from targeting non-circulating item types.
 - Those settings are configured in the Part 3: Circ/UB documentation,
<https://www.carli.illinois.edu/sites/files/i-share/documentation/secure/CircUB.pdf>

Legend:

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- ∅ Does not apply; Or, Do not change this value

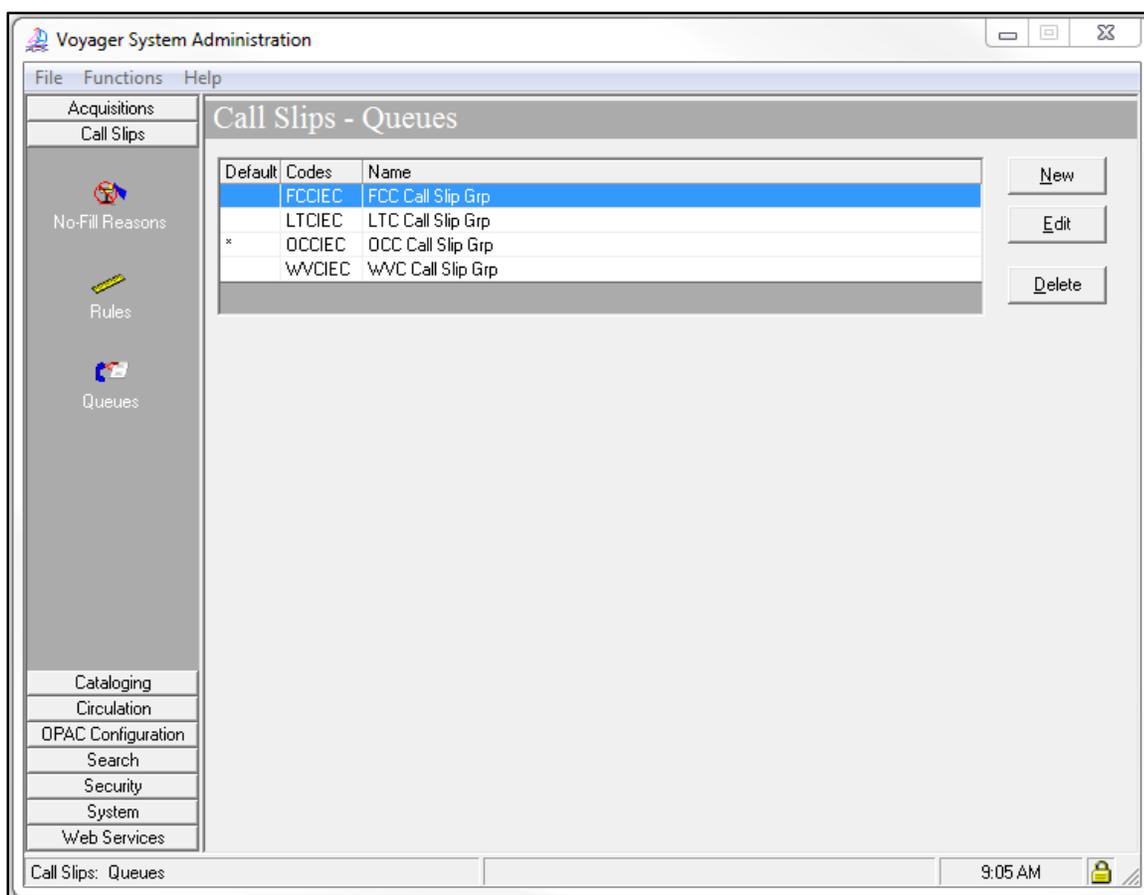
III. Queues

The Call Slips> Queues section is where you set up the separate Call Slip queues for your library.

- If your library has only one Circulation HAPPENING Location, you will probably choose to add only one Call Slip queue to receive the requests for your entire library.
- If your library has more than one HAPPENING Location defined in your library’s System Administration module, you may want to set up a separate Call Slip queue for each of those HAPPENING Locations, especially if those HAPPENING locations are in separate buildings or are managed by separate staff.

In the example used in this documentation, there are four Call Slip queues defined, one for each branch location at the sample library:

- FCCIEC Call Slip Grp
- LTCIEC Call Slip Grp
- OCCIEC Call Slip Grp
- WVCIEC Call Slip Grp



Call Slip- Queues workspace

Review pages 3-14 through 3-19 of the *Voyager 9.1.1 System Administration User’s Guide* for more information about the Call Slip> Queues.

The asterisk (*) indicates the default queue. Voyager will send any request that it does not know where to queue into this default group.

Legend:

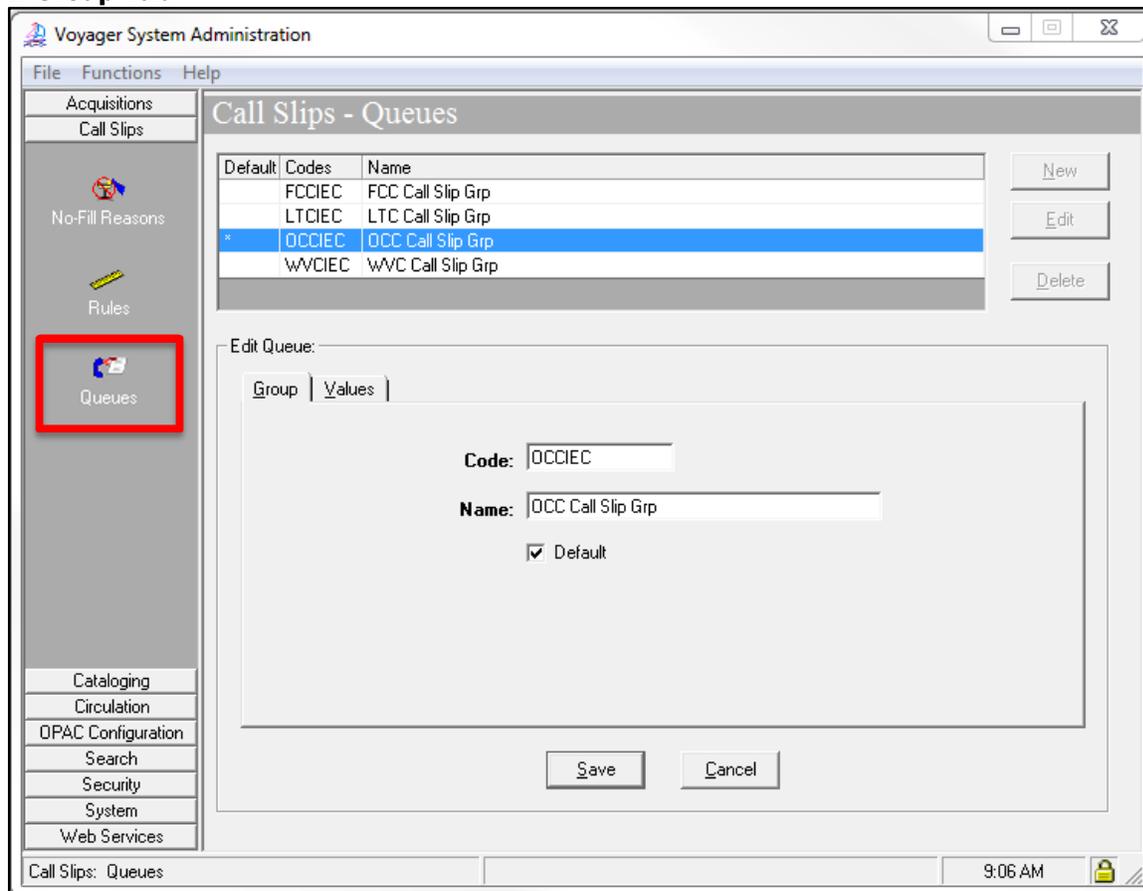
- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

Adding/Editing a Call Slip Queue

In Voyager SysAdmin> Call Slip> Queues

- To Add a new queue, click [New].
- To Edit an existing queue, highlight the name and click [Edit].
- Contact CARLI support@carli.illinois.edu before deleting a Call Slip queue.

A. Group Tab



Call Slip- Queues – Group Tab

Description

<p>⊕ Code:</p>	<p>Enter an appropriate code for each Call Slip queue(s) at your library.</p> <ul style="list-style-type: none"> • Required, up to 10 characters. • If you need to edit a code after you have started using the Call Slip client, you must contact CARLI support@carli.illinois.edu.
<p>⊕ Name:</p>	<p>Enter an appropriate Name for each Call Slip queue(s) at your library.</p> <ul style="list-style-type: none"> • Required, up to 25 characters.
<p>⊕ Default:</p>	<p>Check the Default box for your Default queue. Voyager will send any request that it does not know where to queue into this default group. Library staff can then reassign the request in the Call Slip client to the appropriate queue.</p>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

B. Values Tab

The screenshot shows the 'Call Slips - Queues' window in Voyager System Administration. The 'Values' tab is active, displaying a table of call slip groups. The 'OCCIEC' group is selected. The 'Edit Queue' form below contains the following settings:

Group	Values
Processing Code	<input type="radio"/> Autocharge to requesting patron <input type="radio"/> Place "On Hold" shelf <input checked="" type="radio"/> "In Transit for Hold" to destination location
Location	OCC CIRCULATION
Default Item Type	Book
Archive Period	7 Days
Expire period	4 Days

Call Slip- Queues – Values Tab

Description

<p>⊕ Processing Code:</p>	<p>The "Processing Code" determines what an item's status should be when a requested item has been "filled" in the Call Slip client. For I-Share libraries, a filled request should be "In Transit For Hold" until staff at the pickup library have received and discharged the item, putting it on the hold shelf.</p> <p>Select "In Transit for Hold" to destination location".</p>
<p>⊕ Location:</p>	<p>Set this to the appropriate HAPPENING Location for the queue; if you are uncertain, set this to your main circulation HAPPENING Location.</p>
<p>⊕ Default Item Type:</p>	<p>Set this to your most commonly requested item type.</p>
<p>☑ Archive Period:</p>	<p>This is the length of time that a request will display in the OPAC after the request is set to "filled," "unfilled," or "expired."</p> <ul style="list-style-type: none"> • This time interval is NOT affected by Circulation Calendars; it is based strictly on a 365-day calendar. <p>Set to 7 Days, 14 Days, or 21 Days.</p>

Legend:

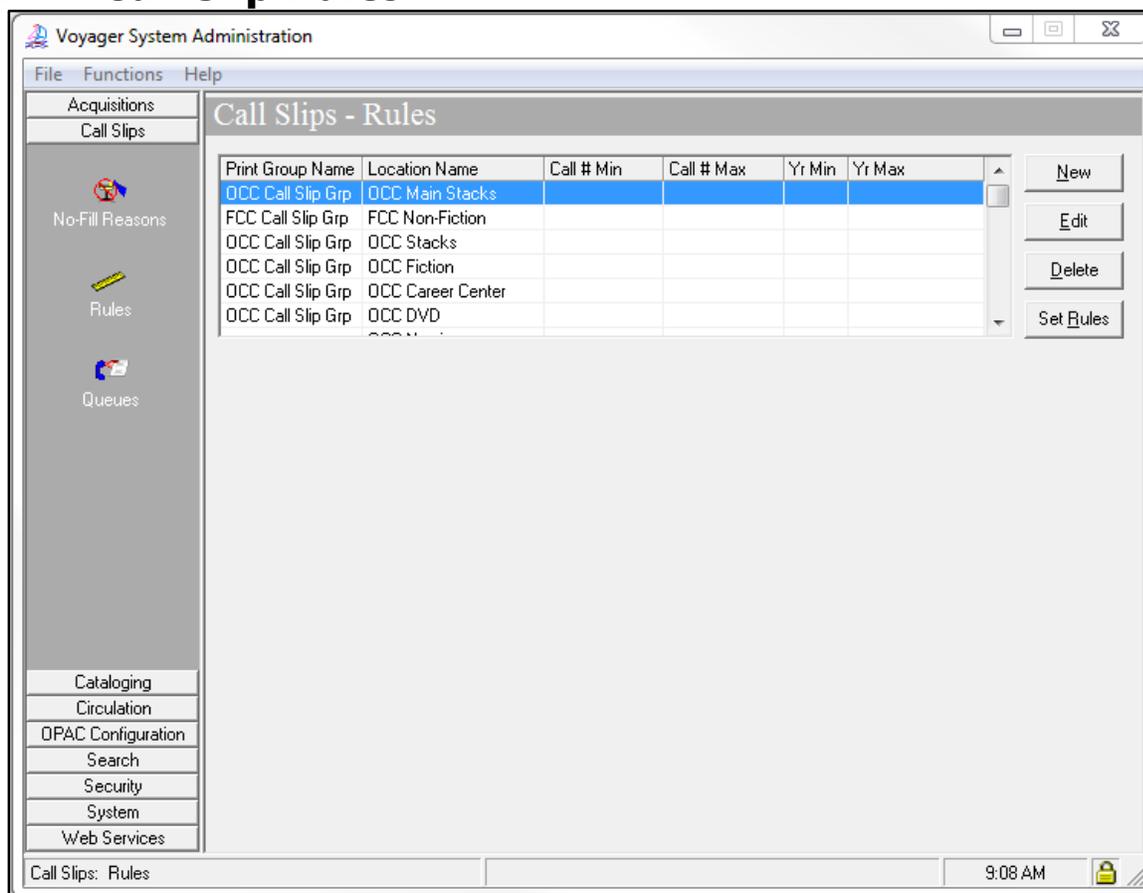
- ⊕ Consortial Rule for setting value(s)
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<p>⊕ <i>Expire Period:</i></p>	<p>The length of time that must pass before a request that has not been processed by library staff, or that has been processed as "unfilled," will be marked as "expired" by Voyager.</p> <ul style="list-style-type: none"> • This time interval is NOT affected by Circulation Calendars; it is based strictly on a 365-day calendar. <p>Set to 4 Days.</p>
<p>⊕ <i>Include patron info in call slip display:</i></p>	<p>Select this option to indicate that you want to include the patron's name and barcode on the call slip display when the request is processed.</p> <ul style="list-style-type: none"> • This is necessary so that library staff can recognize which call slips were placed by the ILLINET libraries. ILLINET requests require additional processing by library staff. Refer to section "VI. Additional I-Share Documentation on Call Slips" of this document for more information. <p>Check this box.</p>
<p>⊕ <i>Set cataloging review status on new items:</i></p>	<p>Automatically applies a Cataloging Review status to any item record created in the Call Slip Client. When an item with the Cataloging Review status is discharged in the circulation client, it generates an alert for circulation staff.</p> <ul style="list-style-type: none"> • The majority of item records that staff create in the Call Slip client are accidental. Automatically applying a Cataloging Review status to those items will allow you to periodically review the items at your library with the status for such errors. <p>Check this box.</p>
<p><i>Set circulation review status on new items:</i></p>	<p>[Optional] Automatically applies a Circulation Review status to any item record created in the Call Slip client. When an item with a Circulation Review status is discharged in the circulation client, it generates an alert for circulation staff.</p>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

IV. Call Slip Rules



Call Slip- Rules workspace

Review pages 3-5 through 3-13 of the *Voyager 9.1.1 System Administration User's Guide* for more information about the Call Slip> Rules.

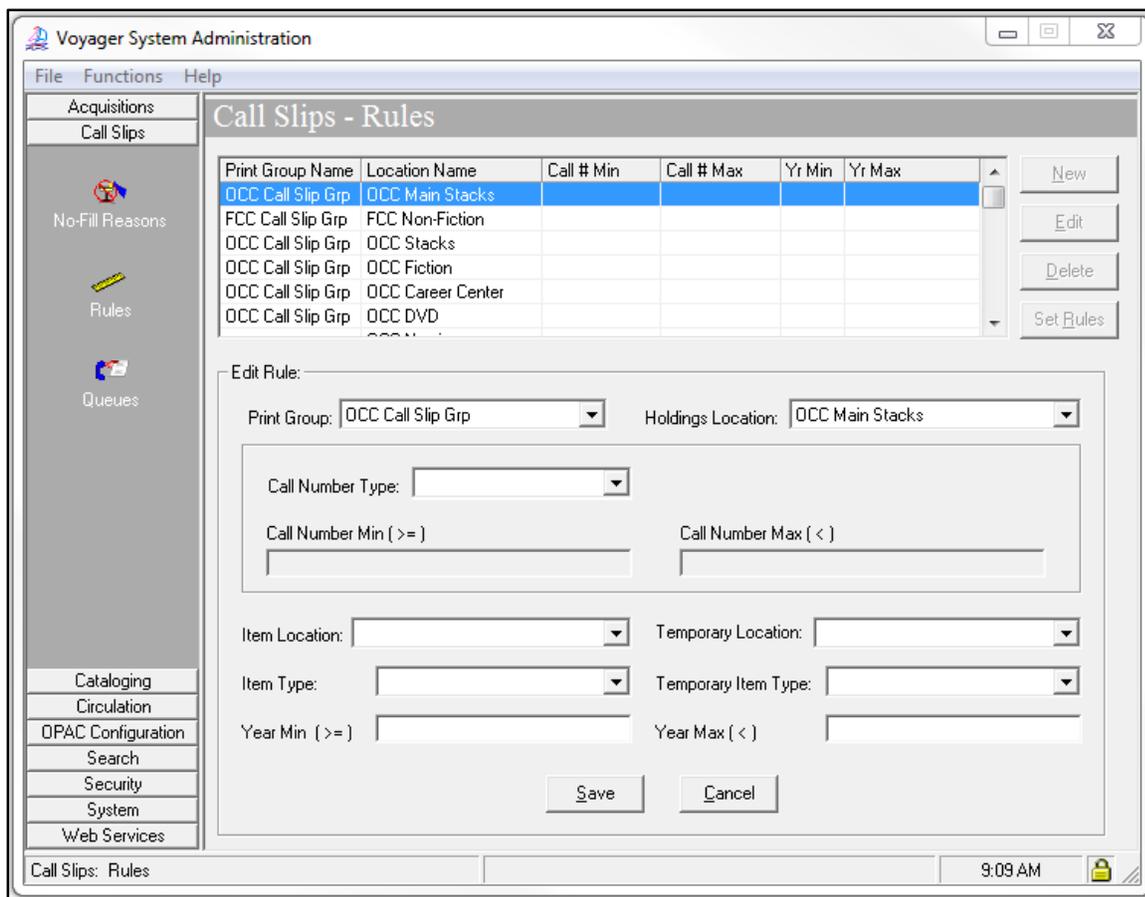
Adding/Editing Rules

In Voyager SysAdmin> Call Slip> Rules

- To Add a new rule, click [New].
- To Edit an existing rule, highlight the name and click [Edit].
- To Delete an existing rule, highlight the name and click [Delete]. Each call slip queue must have at least one rule; do not delete the only rule for a call slip queue unless you have already contacted CARLI support@carli.illinois.edu as a part of the queue deletion process.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value



Call Slip- Rules – New/Edit rule workspace

All Local and UB call slips are routed into Call Slip Queues based on the storage/shelving location of the requested item.

If a patron places a request for an item, and that item’s holding location is not represented by a rule, Voyager will queue that request into the Default queue.

Promoted requests may occasionally bypass the rules you establish and end up in the Default queue, since promoted requests are forwarded from one I-Share Library to the next at the Title level.

- Every Call Slip queue must be assigned at least one rule (with a holdings location entered).
- If your library has multiple call slip queues, create a rule for each location within your library so that requests for materials are routed into the correct queue. Otherwise, too many call slips will automatically route to the Default queue.

Description

<p>⊕ Print Group:</p>	<p>Choose the Call Slip queue where you will be processing requests for items from the holding (storage/shelving) location you will set in the <i>Holdings Location</i>, described next.</p>
------------------------------	--

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

<p>⊕ Holdings Location:</p>	<p>If your library has only one Call Slip queue, make only one rule for your primary holdings location at your library.</p> <ul style="list-style-type: none"> • Call slips for items in other holdings locations will be automatically sorted into your one queue by default. <p>If your library has multiple Call Slip queues, make a rule for every holdings location in your library.</p>
<p>The next settings are optional for all rules. As a reminder, keep the rules as simple as possible.</p> <ul style="list-style-type: none"> • If you don't need complex rules, don't create complex rules. • Don't fill in item types, call number ranges, temporary locations/item types, etc. unless a different call slip queue should receive those item requests. 	
<p>Call Number Type:</p>	<p>[Optional] Leave blank if all call number classifications in this location may be targeted for requests.</p>
<p>Call no. Min; Call no. Max:</p>	<p>[Optional] Leave blank if all call number ranges in this location may be targeted for requests.</p>
<p>Item Location:</p>	<p>[Optional] Leave blank unless the item's permanent location is different from the holding [MFHD] location for the items. Note that this is not a CARLI-recommended cataloging practice.</p>
<p>Item Type:</p>	<p>[Optional] CARLI recommends leave blank. The circulation matrix will prevent both local and UB call slips from being placed against non-circulating item types.</p> <ul style="list-style-type: none"> • Promoted requests are forwarded from one I-Share Library to the next at the Title level, so they will bypass this setting anyway.
<p>Temporary Item Location:</p>	<p>[Optional] CARLI recommends leave blank. If this and item location are set, both must match the item record in order for a call slip to be accepted in this queue.</p>
<p>Temporary Item Type:</p>	<p>[Optional] CARLI recommends leave blank. The circulation matrix will prevent both local and UB call slips from being placed against non-circulating item types. If this and item type are set, both must match the item record in order for a call slip to be accepted in this queue.</p> <ul style="list-style-type: none"> • Promoted requests are forwarded from one I-Share Library to the next at the Title level, so they will bypass this setting anyway.
<p>Year min; Year max:</p>	<p>[Optional] CARLI recommends leave blank. This would allow requests to be printed only for items published during or before/after certain years. Works unpredictably.</p>

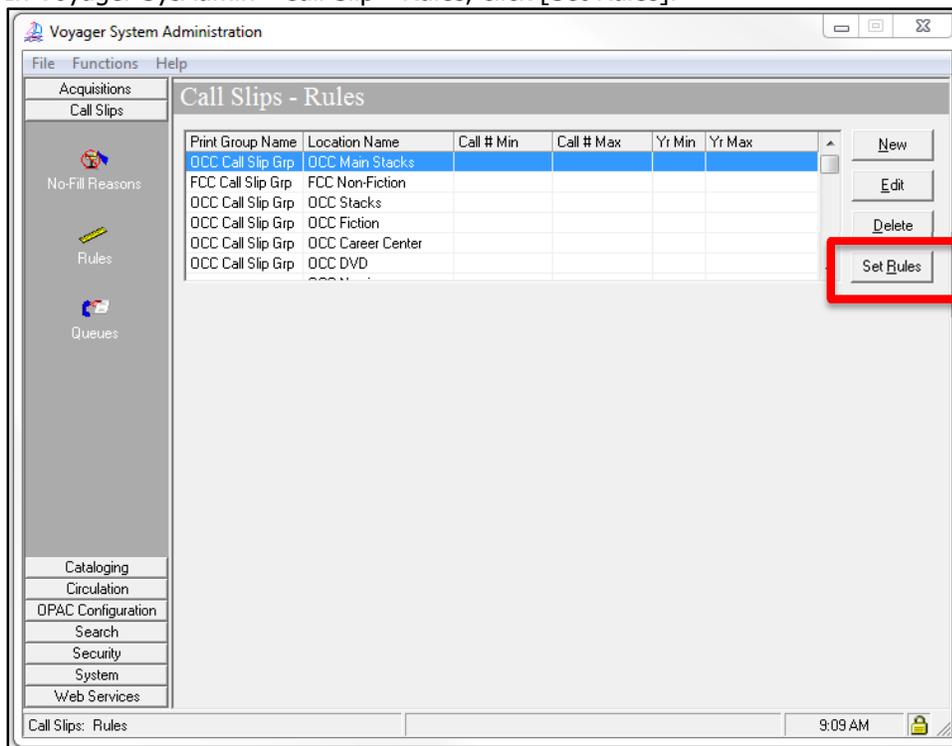
Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

Determining Rule Order

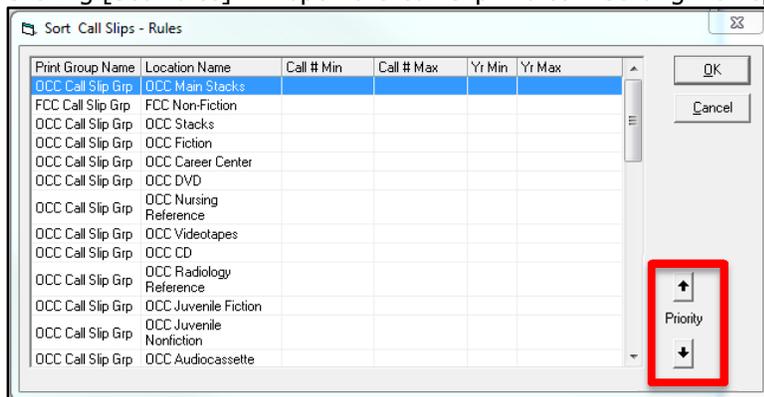
Once you have defined your library's Call Slip Rules, you will want to prioritize the order in which Voyager should apply the rules.

In Voyager SysAdmin> Call Slip> Rules, click [Set Rules].



Call Slip- Rules workspace with [Set Rules] button highlighted.

Clicking [Set Rules] will open the Call Slip- Rules – Sorting workspace.



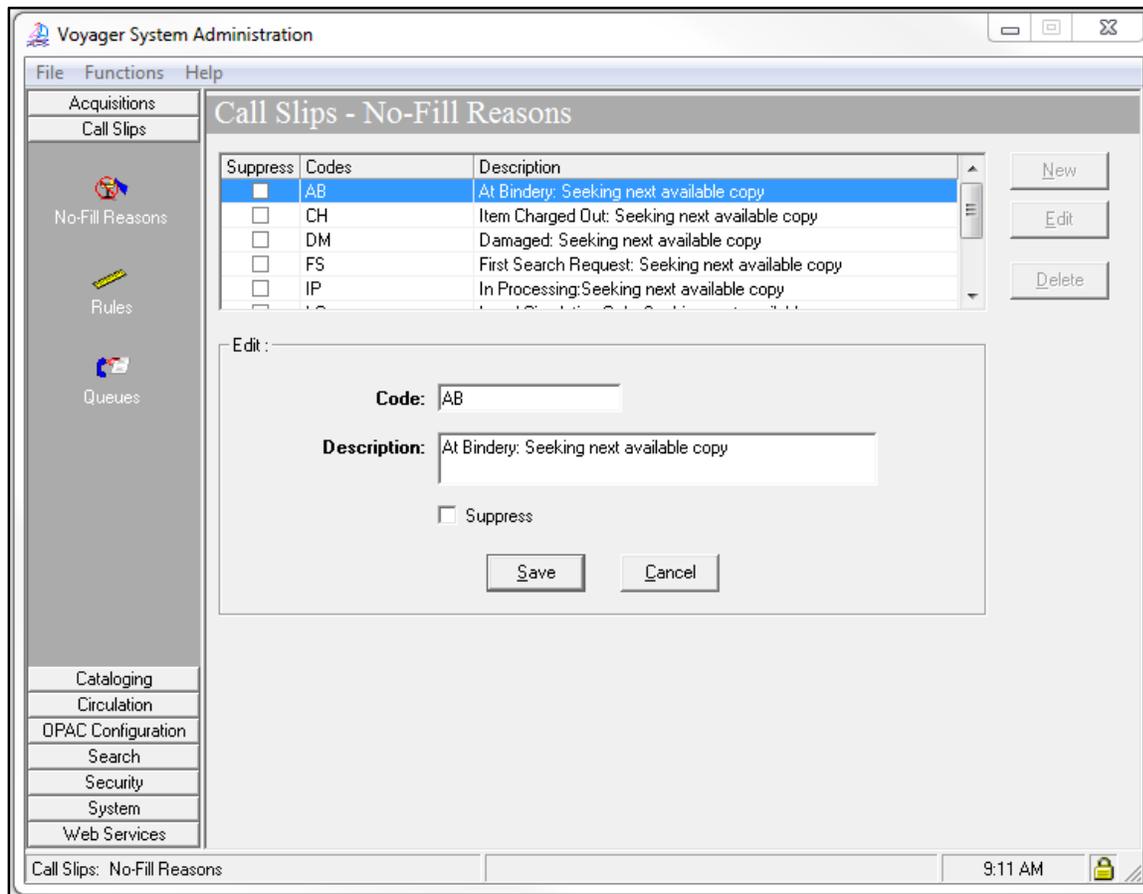
In General, prioritize the rules list with the largest collection locations at your library first, down to the smallest.

To change the order of a rule, select the rule, and click the Priority arrows either up or down until the rule is in the correct order. Then click OK to save your changes.

Legend:

- ⊕ Consortial Rule for setting value(s)
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V. No-Fill Reasons



Call Slip- No-Fill Reasons- New/Edit workspace.

Review pages 3-1 through 3-5 of the *Voyager 9.1.1 System Administration User's Guide* for more information about the Call Slip> No-Fill Reasons.

The No-Fill Reasons populate a list in the Call Slip Client. When library staff need to unfill a request, they choose from the list to indicate why the call slip could not be filled.

- The Description displays in WebVoyage to inform the patron why their request was not filled.
- Library staff can run Voyager Access Reports on call slips to determine why requests were unfiled.
- Selecting a No-Fill Reason in the Call Slip Client does not update the item's status.

⊕ Create these consortial No-Fill Reasons:

Code	Description
AB	At Bindery: Seeking next available
CH	Item Charged Out: Seeking next available
DM	Damaged: Seeking next available
LO	Local Circulation Only: Seeking next available
MS	Missing / Not on Shelf: Seeking next available
NC	Non-circulation Item: Seeking next available

☑ You may create any additional No-Fill Reasons that your library would like.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

VI. Additional I-Share Documentation on Call Slips

- I-Share Best Practices: How to Use the Call Slip Client
<http://www.carli.illinois.edu/products-services/i-share/circ/secure/bp-CSDaemon>
- I-Share Best Practices: Processing ILLINET Requests
<https://www.carli.illinois.edu/products-services/i-share/circ/secure/ProcessILLINETRequests>
- Best Practices: Call Slip Processing When Library is Closed
<https://www.carli.illinois.edu/products-services/i-share/circ/bp-callslipproc>
- Local Call Slips: Considerations, Instructions, & FAQ
<https://www.carli.illinois.edu/products-services/i-share/circ/secure/LocalCallSlips>
- 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
<https://www.carli.illinois.edu/products-services/i-share/circ/secure/BranchMailCallSlip>
- Voyager 9.1.1 Consortial Callslip.ini: Overview and Installation
<https://www.carli.illinois.edu/products-services/i-share/circ/secure/V911CallslipINI>

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value