

Library Staff Instructions

Requesting and Providing Items

Request Procedure

- 1. Login and Search for the title.
- 2. Click on the title to review holdings.
- 3. Click on the Request button for the request form.
- 4. Your user information will display.
- 5. Enter a need by date or leave blank.
- 6. Select Yes or No for "Is this a request for an article?" (Defaults to No if no selection made)
- 7. Select a lending library.
- 8. Click Submit.
- 9. The system will send an email to the lending library that you have selected. You will also receive an email copy of your request.
- 10. When the lender responds to the email, the borrower will receive an email indicating if the request was filled or not filled.

Constanting	Interlibrary loan practices handbook, Virginia Boucher						
	Author Boucher, Virginia Title Interlibrary loan pract Description Request	ices handbook	Click Req	uest			
Source CEF Library System CEF Library System SUNY Canton	Location Clinton Essex Franklin Library System Platteburgh Public Library SUNY Canton Library	Call Number 025.6 Bou 025.6 BOU Ref. 2713 B7 1996	Local Availability Available Available Available	View MARC View MARC	RIS RIS		

Figure 12: Title screen showing request



Figure 13: ILL Request Form

When a borrowing, library's staff member selects a library for a loan and clicks Submit for an ILL request, the system sends both the lending and borrowing library an email.



Figure 14: ILL Request Email

If the lender responds 'Yes,' they are directed to the DueNorth request form (prompt to login if not logged in already) where they have the option to write a note and fill the request. Both receive an email that the request has been filled. It is recommended that you have the item in hand before committing to fill a request. The email can be printed for records and pull slip. If the item does not have a pull slip or identifying information about destination, the request may end up unfilled and returned to the owning library.

Your ILL request 2017-13 for Bottom dogs : will be filled by Potsdam State University of New York The lending library has noted the following Mailing 7/17/17 via USPS Please email <u>testguy@nnyln.org</u> for future communications regarding this request Your ILL request 2017-13 for Bottom dogs : will be filled by Potsdam State University of New York The lending library has noted the following In USPS mail today (7/17) Figure 15 & 16: ILL Request Filled Emails

If the lender responds 'No', they are directed to the DueNorth request form (prompt to login if not logged in already) where they can write a note and deny the request. Both receive an email that the request has not been filled.



Figure 17: ILL Request Not Filled Email with note "Book lost."

If the request has not been filled after 3 days, the system will send each library a reminder email.

An ILL request (2017-23)has been created for the following:	
Title: Bob : Author: Pearson, Tracey Campbell Item Type: book Publication Date: 2002 ISBN: 0374399573	
Call Number: Availability Status: UNKNOWN	
The title is request to delivered to the following institution: Northern New York Library Network 6721 US-11 Potsdam, NY 13676	
The request was created by: Chuck Henry chuck@om/n.org	
Will you fill this request? Yes or No	

	An ILL request (2017-23)has been created for the following:
ľ	Title: Bob :
	Author: Pearson, Tracey Campbell
1	Item Type: book
	ISBN: 0374399573
	Call Number:
	Availability Status: UNKNOWN
10000	The title is requested by the following library: Northern New York Library Network
	6721 US-11 Potsdam, NY 13676
ŝ	The request was created by:
	Chuck Henry
Ľ	chuckgonyin.org

Figure 18 & 19: ILL Request Reminder Emails

If the request has not been filled after 5 days, the ILL request expires and the system will send each library an Expired email.

ILL request (2017-37) has EXPIRED and was not be filled by Oswego - Kingsford Park Elementary School Library, please resubmit to a different library: Title: Cat : Author: Rayner, Matthew item Type: book Publication Date: 2004 ISBN: 0836841026 (lb. bdg.) Call Number: Availability Status: UNKNOWN The request was created by: Edward Demo testpuy2@nnvin.org ILL request (2017-37) has EXPIRED and was not be filled by Oswego - Kingsford Park Elementary School Library, please resubmit to a different library: Title: Cat : Author: Rayner, Matthew Item Type: book Publication Date: 2004 ISBN: 0836841026 (lb. bdg.) Call Number; Availability Status: UNKNOWN The request was created by: Edward Demo testpuy2@nnvin.org

Figure 20 & 21: ILL Request Expired Emails

Borrower and Lender Tasks Screens

As of Summer 2018, new Borrower and Lender Task Screens have been implemented.

The Lenders Task screen has three tabs: "New," "Open," and "Complete."

Hello Edwardl Potsdam Public Library (For Demo)	Search			Go			
Library Staff	Select cate	gory: Áll	t or Advanced Sec	arch - Weed help?			
Bornwer History Lander History Bornwer Tasks Lender Tasks Bornwer Statistics Lender Statistics Heruge Ubrary Profile Find Perticipating Ubraries Report a Problem	Lender Ta	asks	,				
	Osplay Regul	Comp ests for 30 days \$ clear update	lete				
	ILL #	Title / Author	Need By	Borrower & Contact	Timestamp	Status	Actions
	2018- D	Ranger's apprentice Book 2 Flanagan, John		Ray Brook PCI Ray Brook	2018-09-06 18:18:17	Unsent	Mark Sent Answer No

Figure 22: The Lender Task screen shows red flames when new requests have been made.

Helio Edward! Potxdam Public Library (for	Search							
Dema)	Salarit cape	anny All	E or Advance	d faarch - Med heini	Go			
Library Staff		ter to Com						
Borrower History Lender History Borrower Taska	Lender Ta	asks						
Borrower Statistics	New	Open	Complete					
Lender Statistics	1 results							
Manage Library Profile	ILL #	Title / Author	Need 8	ly Borrower & Contact	0.570	Timestamp	Status	Actions
Report a Problem	2018- O	Cibola burn Book four Corey, James S. A	of the expanse	Fred Demo Northern New York Lib	ney Network	2018-09-12 08:20:30	Waiting	Yes

Figure 23: Answer new requests with "Yes" or "No."

When a new request has been made, red flames will appear in the "New" tab alerting the lending library that there is a new request to answer. Once the request has been answered with "Yes," the item moves to the Open tab. If the answer is "No," the item moves to the Complete tab. You will have the opportunity to leave the borrower a note before clicking "Submit."

The ILL # is hyperlinked and opens a new tab that provides greater details on the request. Next to the ILL # are a printer icon which opens a printable pull-slip. You can detach the bottom portion of the pull-slip to mail the item to the borrowing library making sure to leave the remainder of the slip inside the item. Likewise the borrowing library can return the item using the remaining portion of the pull-slip with the owning library's address.



Figure 24: Printable pull-slip.

A chat bubble just below the printer icon indicates that there are notes attached to this particular request. Clicking on the ILL # will allow you to read those notes. Private notes are available only to library staff filling the request.

Search			Go			
Select cate	gory: (Al E) e	r Advanced	Search - Need help?			
Lender Ta	asks	24				
Display Requi 2 results	ests for 30 days 2 clear Codeve	0				
ILL #	Title / Author	Need By	Borrower & Contact	Timestamp	Status	Actions
2018- 12227 🖨	Cibola burn Book four of the expanse Corey, James S. A	•	Fred Dema Northern New York Library Network	2018-09-12 08:20:30	Unsent	Mark Sent Answer No
2018- D	Ranger's apprentice Book 2 Flanagan, John		Ray Brook FCI Ray Brook	2018-09-06 18:18:17	Unsent	Mark Sent Answer No
	Search Serect cate Lender TR New Display Requ 2 results ELL # 2018- 2018	Search Setect category: All i i e Lender Tasks New Open Complete Display Requests for 30 days i clear Useare 2 results ILL # Title / Auther 2018- Close four flook four of the expanse 12227 Close, Jennes S. A 2018- Close apprentice Book 2 12018 / Fanapar, John	Search Setect category: All i or Advanced 1 Lender Tasks New Citori Complete Display Requests for 30 days 2 clear Update 2 results Lt. # Title / Auther Lease 2 results Lt. # Title / Auther Need By 2018 Corey, James 5. A 2018 Grey, James 5. A 2018 Grey, James 5. A	Search Setect category: All Concerning Complete Display Requests for 30 days 2 clear Update Tasuts ELL Title / Author Concerning C	Search Go Setect category: All I or Advanced Search - Seed Holp? Lender Tasks New Opport Complete Display Requests for 30 days 2 clear Useare Second By Borrewer & Contact Timestamp 21 results ELL # Title / Author Need By Borrewer & Contact Timestamp 218 Corey, James S. A Fred Dems Voltemer Need Wark Library Network 2018-09-12 d8:20:30 2018 Corey, James S. A Northern New Yurk Library Network 2018-09-06 18:18:17 2018 Pred Dems Solar S. A 2018-09-06 18:18:17	Search Go Setect category: All i or Advanced Search - Need help? Lender Tasks New Open Complete Display Requests for 30 days 1 clear (seles) Serewer 6 Contact Timestamp Status 2 results Status Pred By Borrewer 6 Contact Timestamp Status 2018 Chois burn flook four of the expanse Northerm New Yark Library Network 2018-09-12 dis 20:30 Unsert 2018 Correy, James S. A Northerm New Yark Library Network 2018-09-12 dis 20:30 Unsert 2018 Sanger's apprentice Book 2 Ray Brook 2018-09-06 18:18:17 Unsert

Figure 25: Open tab shows items unsent.

Once the item has been located and you have followed procedures to lend the item in your own ILS, you can mark the item as "Sent" under the Actions column. If you initially responded "Yes" but could not locate the item, you can "Answer No." These actions move the item along to the Complete tab. You will have the opportunity to leave notes in both the public and private fields each time you change the status of an item.

Since the Actions are always available, it is possible to change the status of the book as needed especially when multiple staff are handling ILL requests. If you accidently mark and item sent, you can change it from the Completed tab back to "Unsent" so that other staff know that the item still needs to be sent to the borrower.

Use your own ILS to track the item until it is returned to your library. If you determine that an item is overdue with your ILS, contact information can be found in DueNorth under the Borrower & Contact column. The hyperlinked library name will open and email to the borrower. You can also 'right-click' the link to copy the email address.

The borrower task screen has two tabs: "Open" and "Complete."

Hello Fredi Northern New York Library Notwork	Search			Go			
Library Staff	Select cate	ppy: All 1	e Allvanced 5	earch - Need help?			
Barrower History Londer History Bornwer Tasks Londer Tasks Londer Tasks Londer Taskston Manage Library Profile Prod Participating Libraries	Borrower Display Requi	Tasks Complete ets © Will Fill © No Accestr © Arrived	for all days	E Char (space)			
Report a Problem		Title / Author	Need By	Lender Destination & Contact	Timestamp	Status	Actions
	2018- 12227 O	Obola burn Book four of the expanse Conty, James S. A		Potolam Public Library	2018-09-12 08:20:30	we re	Mark Arrived Edit Notes

Figure 26: Borrower Tasks Screen

The "Open" tab highlights any requests that are still in progress; requests that you recently made that are waiting to be filled by the lending library or that you have received and given to a patron. The ILL # is hyperlinked and opens a new tab that provides greater details on the request. Next to the ILL # are a printer icon which opens a printable pull-slip (more on this under the lender tasks paragraph below). A chat bubble just below the printer icon indicates that there are notes attached to this particular request. Clicking on the ILL # will allow you to read those notes. Private notes are available only to library staff making the request. The last two columns are also updates from the previous user interface. Status shows where the request is in the process. In Figure 22, the status indicates that the lending library will fill the request.

The last column provides actions that the borrower can take. After the item has arrived, follow any procedures established to track the item in your own ILS, then you can mark the item "arrived" in DueNorth. This provides the opportunity to leave any notes (public and/or private) and change the status to "Arrived."

Hello Fred! Northern New York Library	Search	1.000
Network	Select category: All	© Go
Borrower History Lender History Borrower Tasks	Modify Status	
Borrower Tasks Lender Tasks Borrower Statistics Lender Statistics Manage Library Profile Find Participating Libraries Report a Problem	Changing status of 2018-12227 to 'arriv Borrower Public Note: (Visible to the Ler	ved". nder)
	I	
	Borrower Private Note: (Visible only you	ur library's staff)
	Submit	

Figure 27: Modify Status Screen after clicking "Mark Arrived"

Helis Fredt Northern New Tork Library	Search			6.			
Library Staff	Select cate	gary: All E a	r Advanced 1	learth - Need help?			
Bornover History Londer History Romover Taska Lander Taska Bornover Statistics	Borrower	Tasks Complete					
Lender Statistics Hanage Library Profile Perd Participating Libraries	Display Regu 1 results	esta 🕤 Will Fill 🔘 No Answer 🕤 Arrived 1	for all days	I clear (update)			
Report a Problem	BLL #	Title / Author	Need By	Lender Destination & Contact	Timestamp	Status	Actions
	2018- 22227 D	Cibola bum Book four of the expanse Corey, James S. A		Patadam Public Library	2018-09-12 08:20:30	Arrived	Hark Returned Not Arrived Edit Nates



After clicking "Submit," the status changes to "Arrived and the Actions column is updated to the options: "Mark Returned," "Not Arrived," and "Edit Notes." Having this Status column allows you to track all of your Open Requests in one place. You can also sort the displayed results per each status as well as the number of days to be displayed. The default number of days to be displayed can be changed in your account settings.

After the item has been returned by the patron and you have followed the procedures in place for tracking the item in your own ILS, you can mark the item returned in DueNorth. This moves the item from the Open tab to the Complete tab. Again you will have the opportunity to add a note (both public and private) and change the status to "Returned."

Hello Fred1 Northern New York Library Network	Search
Library Staff	Select category: All or Advanced Search - Need help?
 Borrower History Lender History 	Borrower Tasks
Borrower Tasks Lender Tasks Borrower Statistics	Open Complete
Lender Statistics Manage Library Profile	Display Requests 🗭 Will Fill 🗭 No Answer 😨 Arrived for all days 🛊 clear Update
 Find Participating Libraries Report a Problem 	Nothing to see here! Move along!

Figure 29: No unanswered requests. Check your "Complete" tab.

Hello Fred! Northern New York Library Network	Search			Go			
Library Staff	Select cate	apry (Al E)	er Advans	wit Search - Need help?			
E Urany Suan Bornwer Hatary Lander Hatary Bornwer Tanis Lander Tasks Bornwer Batistics Lander Statistics Honoge Ultrary Profile Prind Participating Libraries Report a Problem	Borrower Oper Ospiay Repu	Tasks Complete ests () No Fill () Expired () Canceled ()	Returned	f for [all days 1] close [Upower			
		Title / Author	Need By	Lender Destination & Contact	Timestahp	Statue	Actions
	2018- 12227 D	Cibola burn Book four of the expanse Corey, James S. A		Potsdam Public Library	2018-09-12 08:20:30	Returned	Hark Arrived Edit Notes
	2018- 🖨 9638 D	Dog Clutter-Brock, Julier	NEVER	Peru Elementary School (Grades 3-5)	2018-05-10 14:46:31	No Fill	Edit Notes Search Again

Figure 30: The Complete tab contains items with a status of returned, filled, unfilled, and canceled as well as available actions.

The Complete tab includes all requests that have been returned back to the lending library as well as requests that lending libraries are unable to fill and canceled requests. Under the actions tab, you can change the status of the item or search again to make a new request for an item.

Since the Actions are always available, it is possible to change the status of the book as needed especially when multiple staff are handling ILL requests. If you accidently mark and item returned, you can change it from the Completed tab back to "Arrived" so that other staff know that the item still needs to be returned.

Please see the videos for the Borrower and Lender tasks screens linked here:

- Borrower Tasks: <u>https://youtu.be/G15gNz8R3Uk</u>
- Lender Tasks: <u>https://youtu.be/0eDyTsafv6A</u>

Guidelines for Requesting

- 1. Check your own library catalog or shared circulation system first and if possible, place a hold.
- 2. When you cannot reasonably obtain an item through your system's circulation holds or the item is not owned by your library or shared circulation system, use DueNorth.
- 3. Determine whether or not the request is appropriate for a DueNorth request. Material that is very new, on reserve, on hold, or located in reference, local history or rare book collections will not be available.
- 4. Materials in electronic format including audiobooks, e-books and online videos are not available for interlibrary loans. Copies from articles in most journals in electronic format will not be available via interlibrary loan.

Potentially Available via DueNorth	Not Available via DueNorth
-	A date is listed. Example: 4/3/2016
	Item is checked out. Example: DUE 04-03-16
	DUE 11-19-15 BILLED
Available	Coming soon
ON SHELF	Copies on order
Check Shelves	e-Books
	e-Recordings
	Books circulated on electronic devices such as Amazon
	Kindle, Nook readers, and Playaway
	Electronic book
	IN LIBRARY USE
	LIB Use Only
	IN PROCESSING
	IN TRANSIT +1 HOLD
	LOCAL HISTORY or LH or HHHC
	LOST AND PAID
	New books designated for local patrons only
	ON HOLDSHELF
	ONLINE
	Reference or REF
	REPAIR
	Reserve
	Titles with hold lists Example: 151 holds on first copy
	returned of 72 copies

Figure 31: DueNorth availability potential

If you have questions about using the DueNorth catalog, please contact Christi Sommerfeldt at christi@nnyln.org or call (315) 265-1119.