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.

Figure 12: Title screen showing request
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.

An ILL request (2018-12236) has been created for the following:

- **Library:** Potsdam Public Library
- **Title:** Librola book book tour of the expense
- **Author:** Corey, James S. A
- **Item Type:** book
- **Publication Date:** 2015
- **ISBN:** 9780016340666

Call Number: FIC CORE
Availability Status: Available
Location: POT903M

**Do you need to cancel this request?**

The title is requested by the following library:
Northern New York Library Network
6721 US-11
Potsdam, NY 13676

**Need by:**

**Note from requestor:**

The request was created by:
Fred Demo
demo.library2@nnyln.org
315-260-1119

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Figure 13: ILL Request Form

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.

**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.

**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.

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.”

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

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.
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.

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.”

![Borrower Tasks Screen](image)

**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.”
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.”
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: [https://youtu.be/G15gNz8R3Uk](https://youtu.be/G15gNz8R3Uk)
- Lender Tasks: [https://youtu.be/0eDyTsafv6A](https://youtu.be/0eDyTsafv6A)
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.

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

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.