



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.

| Source | Location | Call Number | Local Availability |
|--------------------|---------------------------------------|-------------------|---|
| CEF Library System | Clinton Essex Franklin Library System | 025.6/Bou | Available |
| CEF Library System | Plattsburgh Public Library | 025.6 BOU | Available View MARC RIS |
| SUNY Canton | SUNY Canton Library | Ref. Z713 B7 1996 | Available View MARC RIS |

Figure 12: Title screen showing request

Requester Details
 First Name: Christi
 Last Name: Sommerfeldt
 E-mail: christi@nnyln.org
 Institution: NNYLN
 Work Phone: 315-265-1119
 Mailing Address:
 6721 US-11
 Potsdam

Need by date: August 1, 2017

Is this a request for an article? Yes No

Requested Title: **EnterLibrary loan practices handbook**
 Requested Author: **Boucher, Virginia**
 Item Type: book
 Publication Date: 1996
 ISBN: 0838906672

Please select the library you would like to request from. Libraries in need of multiple copies may select more than one library.

Clinton-Essex-Franklin Library System, Availability: UNKNOWN, Call Number: 025.6/Bou
 Plattsburgh Public Library, Availability: UNKNOWN, Call Number: 025.6 BOU

Defaults to 'No'

Select a library - libraries may select multiple copies on special occasions, for example public libraries for book clubs or school libraries for classes

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.

An ILL request (2018-12226) has been created for the following:

Library: Potsdam Public Library
 Title: Cibola burn Book four of the expanse
 Author: Corey, James S. A
 Item Type: book
 Publication Date: 2015
 ISBN: 9780316334686

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

[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
 315-265-1119

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 testguy@nnyln.org 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.

Your ILL request 2017-40 for Bottom dogs can not be filled by Potsdam State University of New York.

The lending library has noted the following:
Book lost.

[Would you like to try a different library?](#)

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@nnyln.org

Will you fill this request? [Yes](#) or [No](#)

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

The request was created by:
Chuck Henry
chuck@nnyln.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 (lib. bdg.)

Call Number:
Availability Status: UNKNOWN

The request was created by:
Edward Demo
testguy2@nnyln.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 (lib. bdg.)

Call Number:
Availability Status: UNKNOWN

The request was created by:
Edward Demo
testguy2@nnyln.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.”

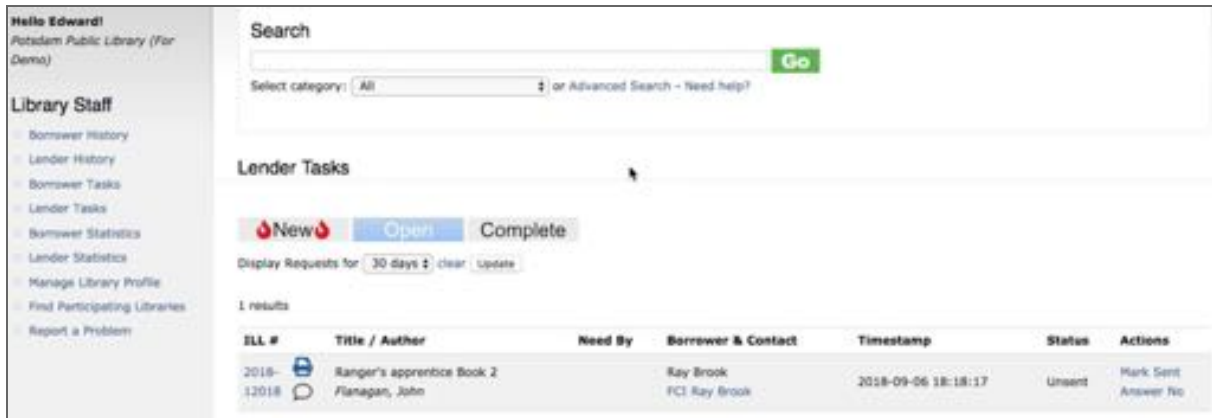


Figure 22: The Lender Task screen shows red flames when new requests have been made.

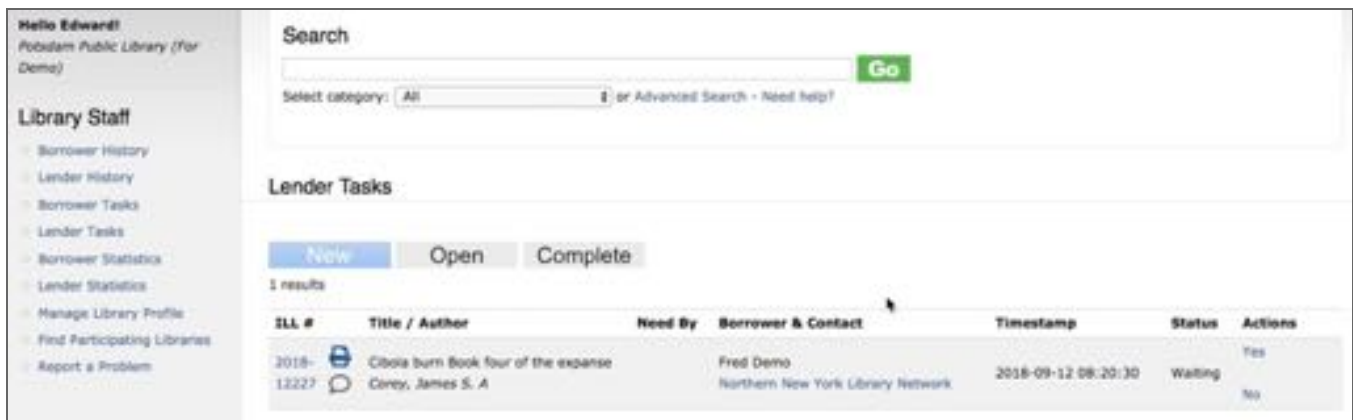


Figure 23: Answer new requests with “Yes” or “No.”

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.

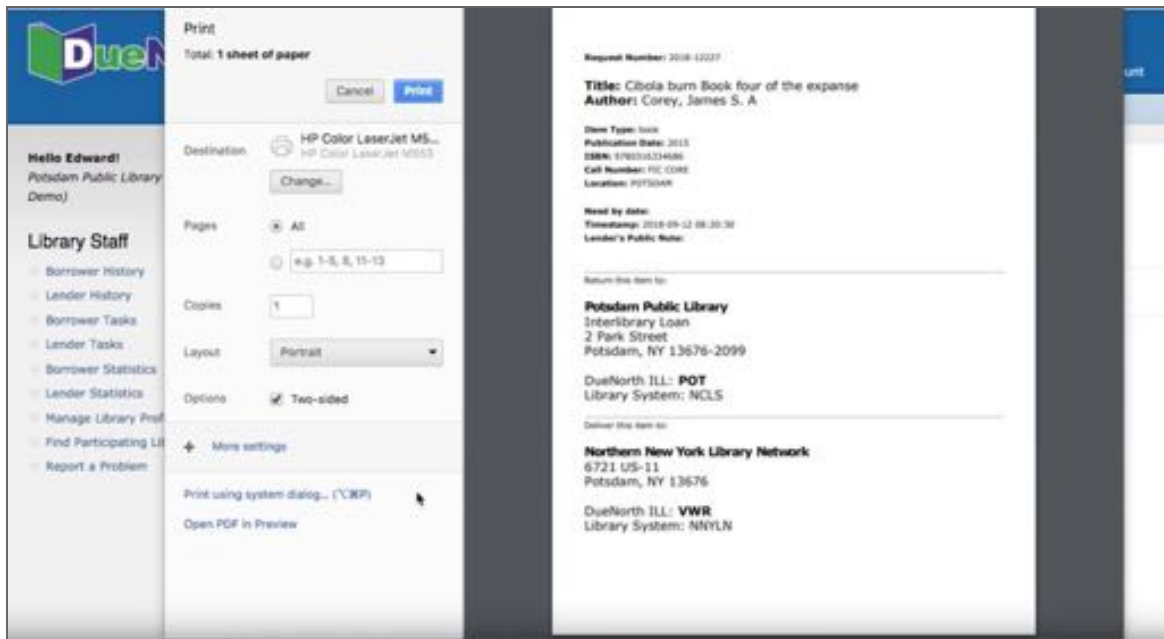


Figure 24: Printable pull-slip.

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.

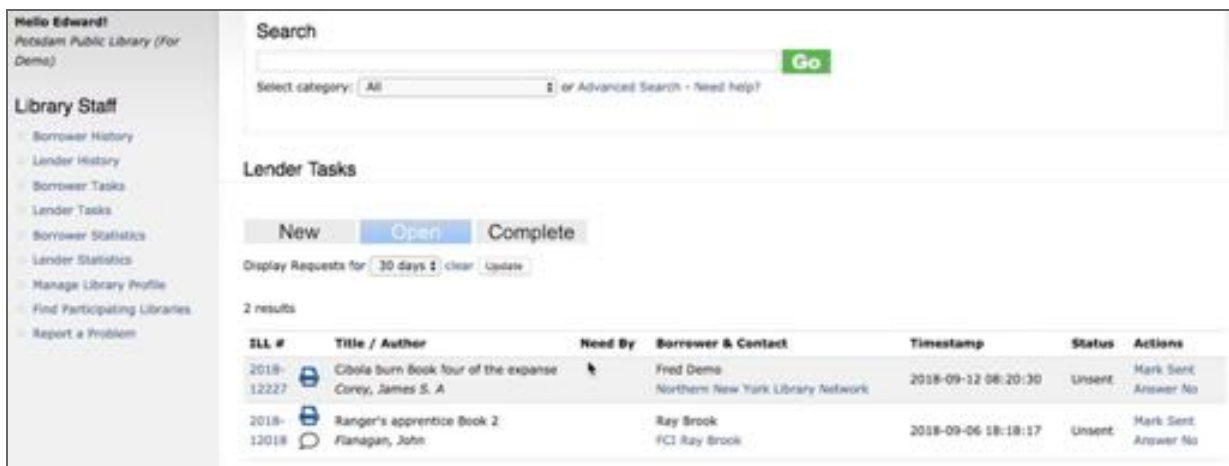


Figure 25: Open tab shows items unsent.

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 accidentally 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.”



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.”

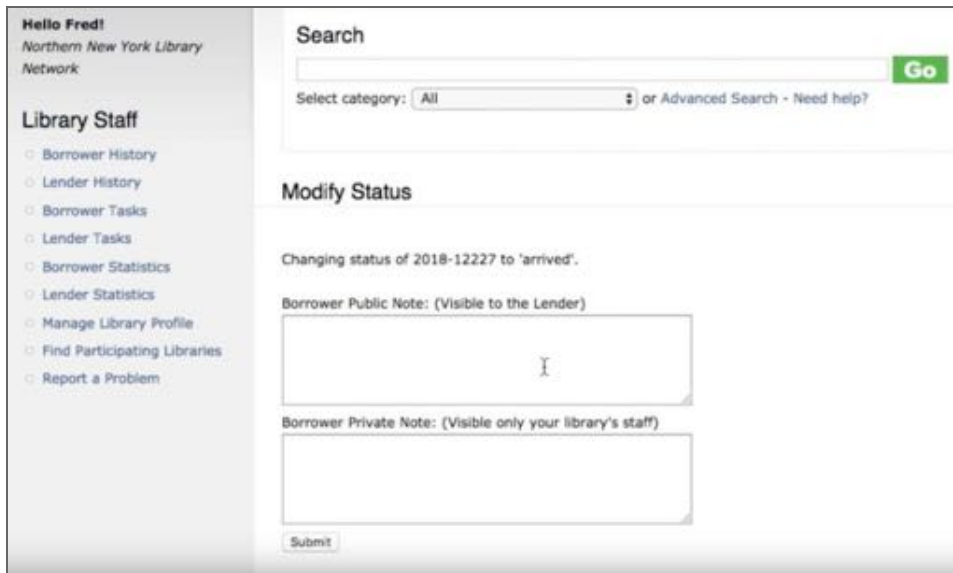


Figure 27: Modify Status Screen after clicking “Mark Arrived”

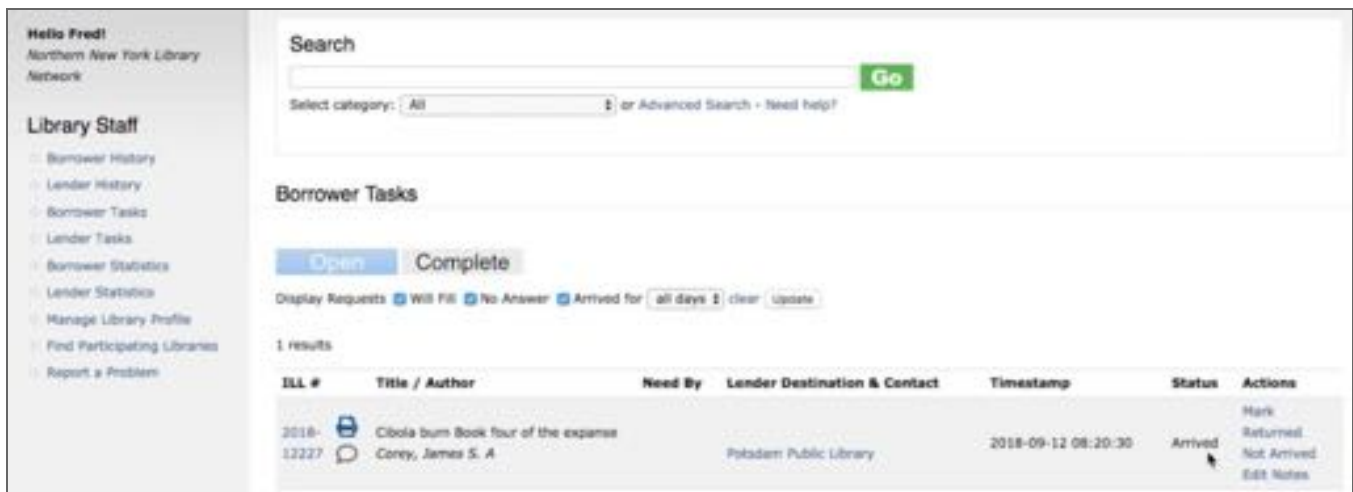


Figure 28: Open tab shows status of item and available actions.

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.”

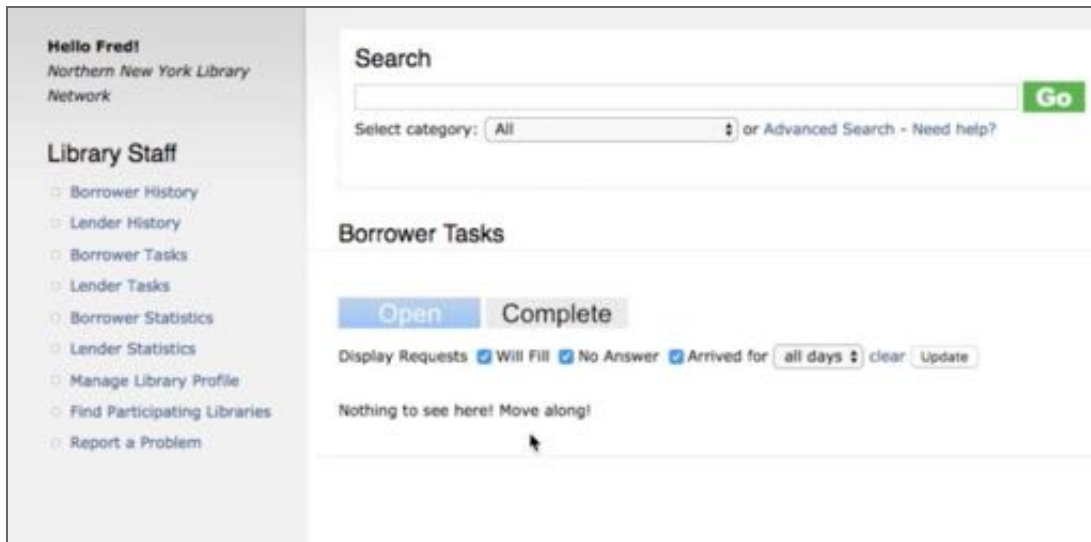


Figure 29: No unanswered requests. Check your “Complete” tab.

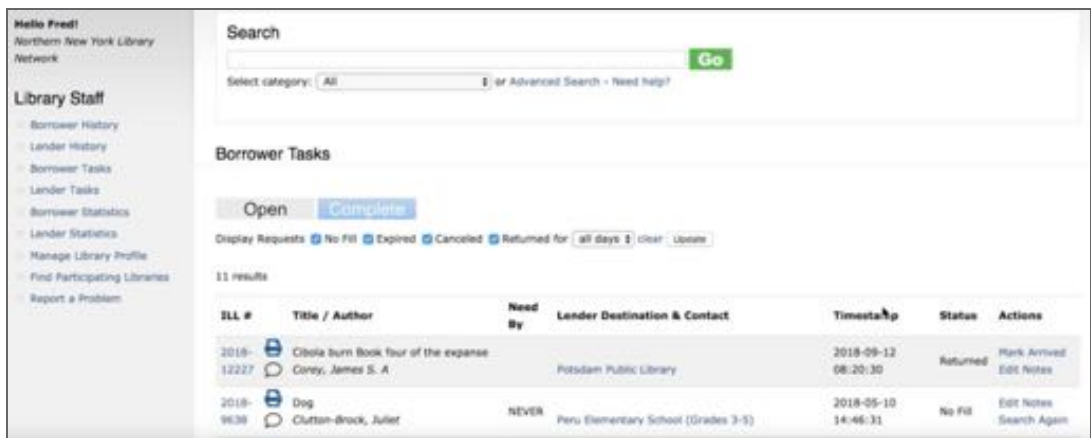


Figure 30: The Complete tab contains items with a status of returned, filled, unfilled, and canceled as well as available actions.

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 accidentally 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>
- Lender Tasks: <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.



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

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.