



Library Staff Instructions

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How to Register

Anyone can come to this site and begin searching. However, if you will process interlibrary loan requests for your library, you need to create a user account.

From DueNorth's homepage (<https://duenorth.nnyln.org/>) click "Staff Login" in the upper right hand corner.

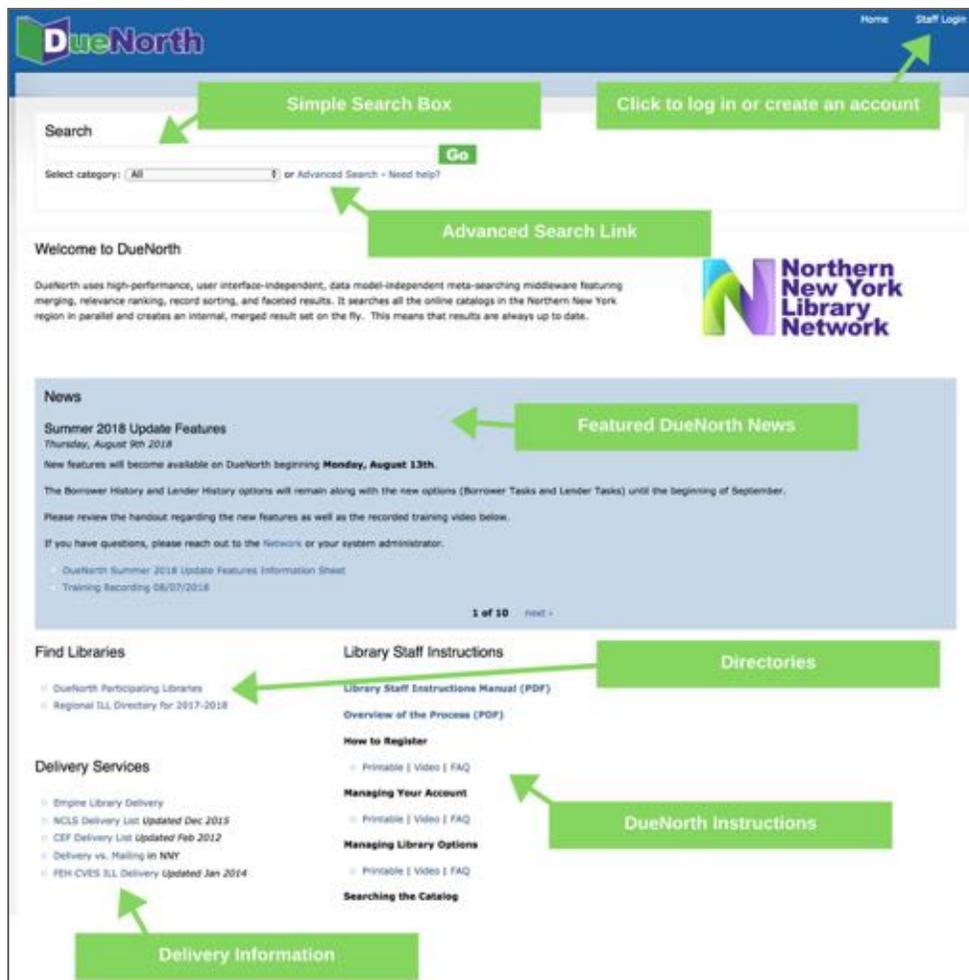


Figure 1: DueNorth Home Page

Click "Create new account" and proceed to fill out the form. The Registration Code is provided by system staff.

1. Go to the DueNorth Staff login: <https://duenorth.nnyln.org/user/login> or use the Staff Login found on the DueNorth gateway page: <https://duenorth.nnyln.org/>
2. Click "Create new account."
3. Fill in the following information, a red asterisk indicates a required field.:
 - Registration code. The code can be obtained during a training session, or you can contact NNYLN.
 - Username. Use this format: first.last - if you work in multiple libraries, you must create a DueNorth for each library using the same first.last username but add another identifier, for example: christi.sommerfeldt.nnyln.

- **Email address.** Enter your work email address. This email address will be used for contacting you to confirm your account or if you forget your password. If you have multiple DueNorth accounts for multiple libraries, you will still use the same email but add the identifier from your username to your email after a '+' sign, for example: christi+nnynl@nnynl.org; or edemo+potsdam@sunypotsdam.edu.
- Enter information to identify yourself and the library where you work per that account.
- **ILL code** – (Optional) ILL Codes can be found [here](https://tinyurl.com/y7dzcfeg) (<https://tinyurl.com/y7dzcfeg>).
- **OCLC symbol** (Optional)
- **Home Library System** – Select the library system to which your library belongs from the following:
 - Champlain Valley Education Services School Library System
 - Clinton Essex Franklin Library System
 - Franklin-Essex-Hamilton School Library System
 - Jefferson-Lewis BOCES School Library System
 - North Country Library System (NNYLN)
 - Northern New York Library Network
 - Oswego County School Library System at CiTi
 - St. Lawrence-Lewis BOCES School Library System

4. Check the box next to Accept Terms & Conditions of Use.

5. When you are finished, click 'Create new account.'

You will receive an email from duenorth@nnynl.org confirming your account. The email will include a link for you to login and set your password.

Figure 2: Create new account

Managing Your Account

Once you have created a staff account, use the My account link on the bottom of the DueNorth home page to:

- Edit your information
- See All Requests PLACED By Your Library
- See All Requests RECEIVED By Your Library
- Manage your Library Lending Profile including suspending ILL for staffing issues or library renovations and relocations.
- You may also select “Filter Own System” in order to filter your home system from the request screen:

Filter Own System
Do you want to filter your home system from the request screen?

Figure 3: Filter Own System

- If DueNorth is your primary catalog, ensure that this box is unchecked in order to access all items including your own in catalog searches.

Managing Library Options

Via the “Manage Library Profile” link, you may edit your library’s profile including contact information, ILL code, and lending status and items.

To **suspend** ILL requests (if you will be closed/unavailable for any reason), under ‘Suspend Your Library’s Lending Status?’ select ‘Yes’ from the drop down menu. Libraries will be unable to request items from your library. To begin **receiving** ILL requests, select ‘No’ on the drop down menu.

You may also limit what items your library will loan in DueNorth by selecting the appropriate responses for each type listed. Make sure to select “Submit” at the bottom of the page to update and save the changes to your profile.

DueNorth

Hello Richard!
SUNY Potsdam

Library Staff

- Request History
- Sender History
- Borrower Statistics
- Lender Statistics
- Manage Library Profile
- Report a Problem

Search

Select category: All or Advanced Search - Need help?

Go

Manage Library Profile

Library Name: Potsdam State University of New York

Library Alias: Potsdam Crumb Library

Library ILL Email: testguy@nynl.org

Library Phone: (315) 267-3328

Library Address Dept: Frederick W. Crumb Library and Julia E. Crane Music Library

Library Address Street: 44 Pierrepont Avenue

Library Address City and State: Potsdam, NY 13676

OCLC Symbol:

ILL Code: ZQM

Suspend Your Library's lending status? No

Setting this to **YES** will prevent your library getting ILL requests.
Setting this to **NO** will allow your library to receive ILL requests.

Library System: Northern New York Library Network

Items willing to loan in DueNorth

Print Book	<input checked="" type="radio"/> Yes <input type="radio"/> No
Print Journal or Article	<input checked="" type="radio"/> Yes <input type="radio"/> No
Audio Video Materials	<input checked="" type="radio"/> Yes <input type="radio"/> No
Reference	<input type="radio"/> Yes <input checked="" type="radio"/> No
Electronic Book	<input type="radio"/> Yes <input checked="" type="radio"/> No

Please click on Submit to save your profile

Submit

Figure 4: Manage Library Profile

Searching the Catalog

Figure 5: Simple search

Simple Search

The Search box at the top of the DueNorth home page is also called Simple Search. It allows for keyword searching. You can combine terms from a title and author. A common title such as Tale of Two Cities or the terms “Dickens tale” will return a large number of hits. Following is an example of a simple search that returned a small number of hits. This search was for the title The grizzly bear family book by Michio Hoshino. The words ‘grizzly’ and ‘michio’ were entered.

Figure 6: Simple search results

Advanced Search

The advanced search lets you:

- Combine terms, author and title as well as subjects and ISBNs.
- Change the sorting of the results list.
- Change the number of results per page.
- The system defaults to “All of these words.”

The screenshot shows the DueNorth Advanced Search interface. The header includes the DueNorth logo and the text 'Regional Catalog and Resource Sharing System'. The page title is 'Advanced Search'. Below the header, a message states: 'This page allows you to enter more detailed search terms. The more fields you fill in, the smaller your set of results will be.' The search form includes fields for Keyword(s), Title, Author, and Subject(s). To the right of these fields are four sets of radio button options for search logic: 'All of these words', 'Any of these words', and 'This phrase'. A purple box highlights these options. Below the search fields are controls for 'Sort by' (set to 'relevance'), 'Results per page' (set to '20'), and 'Categories' (set to 'All'). At the bottom, there is a 'Your query:' field with the text 'Use the form above and your advanced search will appear here' and a 'Search' button.

Figure 7: Advanced search

This screenshot shows the same DueNorth Advanced Search interface as Figure 7, but with search terms entered. The 'Title' field contains 'Great Gatsby' and the 'Author' field contains 'Fitzgerald, F. Scott'. The search logic options are now selected: 'All of these words' for Keyword(s), Title, and Subject(s), and 'This phrase' for Author. The 'Your query:' field at the bottom now displays the constructed search query: 't="Great Gatsby" and au="Fitzgerald, F. Scott"'. The 'Search' button is visible at the bottom right.

Figure 8: Advanced search using Title and Author



Figure 9: Results display

The format Books was selected to narrow the search below. In the Search box, the word All is now highlighted in an amber color. Click on All to undo the narrowing selection and return to the previous screen.

Click on the title to display the holding libraries.



Figure 10: Limited results display

The title screen displays holding libraries. Many catalogs will display the local availability. If it does not, click on the name of the library to go to that library's catalog and identify the circulation status of the material. For some libraries, a '-' or dash indicates that the item is available; a date listed indicates the items is checked out.

Format
Books

Source
CEF Library System
Jefferson-Lewis SLS
North County Library System

Date
1997

Harry Potter and the philosopher's stone, J. K Rowling

Author
Rowling, J. K.

Title
Harry Potter and the philosopher's stone

Description
Registration may vary. First published in Great Britain by Bloomsbury. This was published in the United States as Harry Potter and the Sorcerer's Stone by Scholastic Corporation in 1998. Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Wizards and Witches.

Required

Source	Location	Call Number	Local Availability		
CEF Library System	Alexandria Library	JF ROW	Available	View MARC	RS
North County Library System	ODDENSEBURG	YA ROWL	WISHT		
North County Library System	POTSDAM	PS J ROWL	WISHT		
North County Library System	POTSDAM	PS J ROWL	-	View MARC	RS
Jefferson-Lewis SLS	JBU	F ROW	-	View MARC	RS
CEF Library System	William Pace Memorial Library	J F ROW	Available	View MARC	RS

Figure 11: Title screen showing availability

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.

Interlibrary loan practices handbook, Virginia Boucher

Author Boucher, Virginia
Title Interlibrary loan practices handbook
Description

[Request](#) **Click Request**

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@nyln.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@nyln.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.”

The screenshot shows the Lender Tasks interface. At the top, there is a search bar with a 'Go' button and a dropdown menu for 'Select category: All'. Below the search bar, there are three tabs: 'New' (highlighted with red flames), 'Open', and 'Complete'. Under the 'New' tab, there is a filter for 'Display Requests for: 30 days' and buttons for 'clear' and 'Update'. Below this, it says '1 results' and a table with the following data:

ILL #	Title / Author	Need By	Borrower & Contact	Timestamp	Status	Actions
2018-12018	Ranger's apprentice Book 2 Flanagan, John		Ray Brook FCI 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.

The screenshot shows the Lender Tasks interface with the 'New' tab selected. The table below shows one result with a 'Yes' button in the 'Actions' column:

ILL #	Title / Author	Need By	Borrower & Contact	Timestamp	Status	Actions
2018-12227	Cibola burn Book four of the expanse Cibey, James S. A		Fred Demo Northern New York Library Network	2018-09-12 08:20:30	Waiting	Yes No

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.

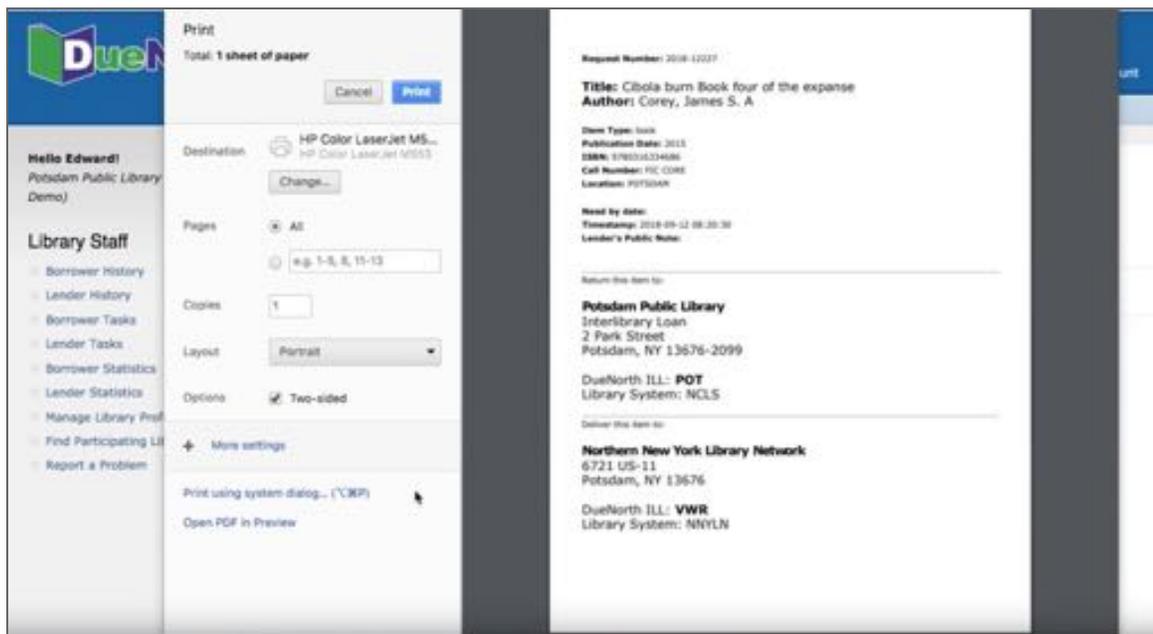


Figure 24: Printable pull-slip.

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 an 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.”

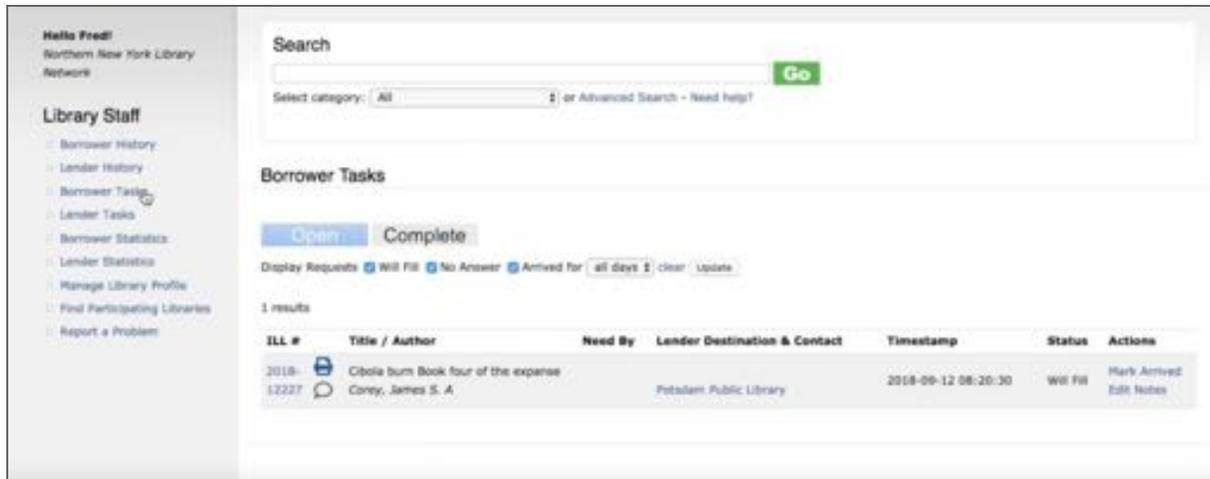


Figure 26: Borrower Tasks Screen

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”

ILL #	Title / Author	Need By	Lender Destination & Contact	Timestamp	Status	Actions
2018-12227	Cibola burn Book four of the expans Coney, James S. A		Potdam Public Library	2018-09-12 08:20:30	Arrived	Mark Returned Not Arrived Edit Notes

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.”

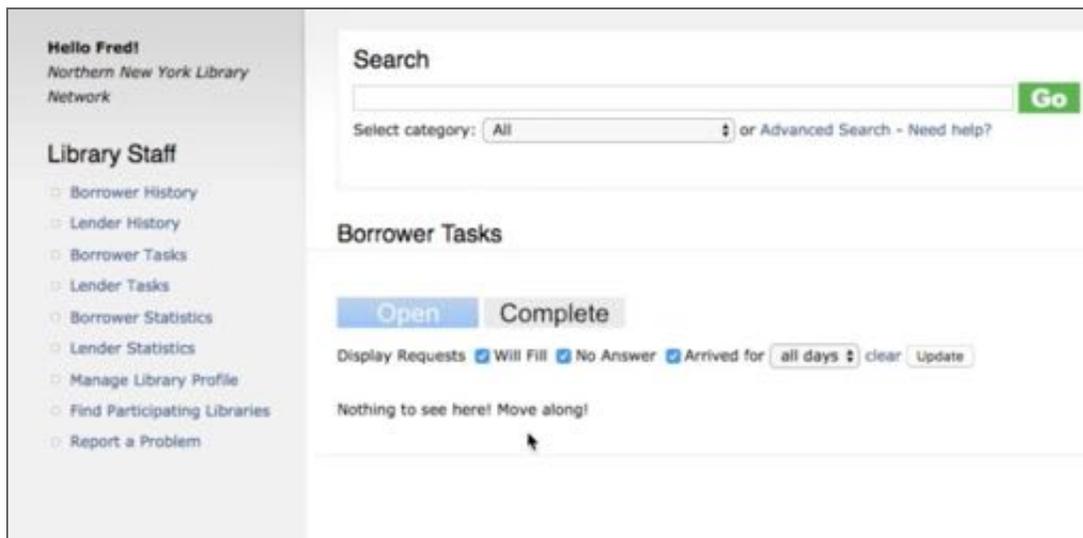


Figure 29: No unanswered requests. Check your “Complete” tab.

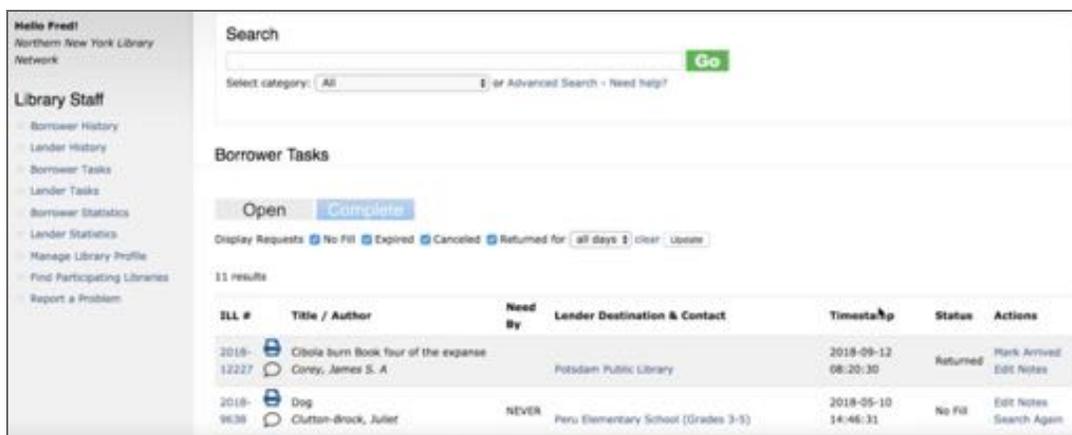


Figure 30: The Complete tab contains items with a status of returned, filled, unfilled, and canceled as well as available actions.

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

Producing Statistics

Statistics may be generated via the links “Borrower Statistics” and “Lender Statistics.” Simply select the appropriate dates and click “Submit.” To view total statistics, leave ‘Start Date’ blank.



Figure 32: DueNorth Statistics: Requests

Systems level staff has the ability to view more statistics at the system level including detailed statistics for specific libraries, expired requests, top ten lending and requesting libraries.

You can also perform “Old School” statistics by clicking on the link “Try this screen!” at the top of the System Statistics page:

The screenshot shows the 'System Statistics' page. On the left is a navigation menu with sections for 'Library Staff', 'System Staff', and 'NNYLN Staff'. The main content area has a search bar at the top, followed by 'System Statistics' with 'View' and 'Edit' buttons. Below that, a link 'Looking for ICICILL-style old school statistics? Try this screen!' is circled in red. The page contains several forms for generating statistics, each with 'Start Date' and 'End Date' fields and a 'Submit' button. The forms are: 'Enter your desired date range:', 'Requesting Library System:', 'Generate borrowing stats for a specific library:', 'Generate lending stats for a specific library:', 'Generate list of expired requests:', 'Generate list of top 10 libraries making requests:', and 'Generate list of top 10 libraries filling requests:'.

Figure 33: ICICILL-style old school statistics link.

Reporting Problems

Please use the form listed on the menu ‘Report a Problem’ and be as detailed as possible - detailed information makes diagnosing the problem easier. Please include specific details like these when appropriate: A description of the steps taken when the error occurred, a copy of the error message if one is displayed, the URL the error or problem occurs on, the names of the libraries involved (both lender and borrower), the Identifier number of the transaction.

If you have questions about using the DueNorth catalog, please contact Christi Sommerfeldt at christi@nnyln.org or call (315) 265-1119 x4.