



URSA 4.1 End User Training Guide

DOC-URSTGEN-A

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Introduction

Description

Universal Resource Sharing Application (URSA) helps libraries of any type or size automate their interlibrary loan process.

Interlibrary loan (ILL) is the process of exchanging materials between libraries. The interlibrary loan process begins when one of your users asks your library to borrow an item from another library, or when another library asks if your library will lend an item to them. The process ends when your library either returns the borrowed item or checks in an item loaned to another library.

This course is designed to teach you the basic processes involved in using URSA in your library. The topics covered include:

- URSA workflow
- Searching the URSA Information Portal
- Placing and monitoring requests
- Staff Management

Audience

This course is designed for:

- Public services staff who may place or assist users with placing requests for materials.
- ILL staff responsible for filling and processing interlibrary loan requests.

Course Objectives

Upon completion of this course, you will be able to:

- Create an Information Portal user.
- Search for items.
- Place, monitor and cancel requests.
- Use lending library workflow to automatically fill requests.
- Use lending library workflow to mediate requests.
- Use borrowing library workflow to manage requests.

Conventions

Icons are used throughout the manual to set apart specific types of information. The purpose of each icon is described below.



This icon indicates a training exercise that you can perform.

1. Numbered steps are used to show a set of sequential steps that are necessary to complete a task.
2. Each succeeding step is numbered appropriately.



This icon is placed beside a note that will contain extra information.



This icon is placed beside a warning. Pay particular attention to this information.



This icon is placed beside a reference. This information will direct you to other manuals.

Mouse Conventions

- **Click.** To place the mouse pointer on an icon, command, or button and quickly press and release the primary (usually the left) button once.
- **Double-click.** To place the mouse pointer on an icon, command, or button and quickly press and release the primary mouse button twice.
- **Right-click.** To place the mouse pointer on an icon, command, or button and quickly press and release the secondary (usually the right) button.
- **Drag.** To press and hold the primary mouse button while moving the mouse.
- **Choose.** To select an option from a menu, group of options, or list.
- **Highlight.** To click once on an option in a list so the option is selected and displays in reverse video. In a field, you may drag the mouse over text to highlight that text.

Keyboard Conventions

- Keys on the keyboard are shown in uppercase, bold characters (for example, “the TAB key”). The keys on your keyboard may not be labeled exactly as they are in this guide.
- When you are instructed to press two or more keys at the same time, the keys are connected by a plus sign. (For example, ALT+H means to hold down the ALT key and press the H key.)
- Text or numbers that you are instructed to enter using the keyboard are enclosed in quotation marks (for example, enter “main” in the Location field).

URSA Workflow

Interlibrary loan (ILL) is the process of exchanging materials between libraries. The interlibrary loan process begins when one of your users asks your library to borrow an item from another library, or when another library asks if your library will lend an item to them. The process ends when your library either returns the borrowed item or checks in an item loaned to another library. URSA automates much of the ILL process for both staff and library users.

URSA Automates ILL for Library Users

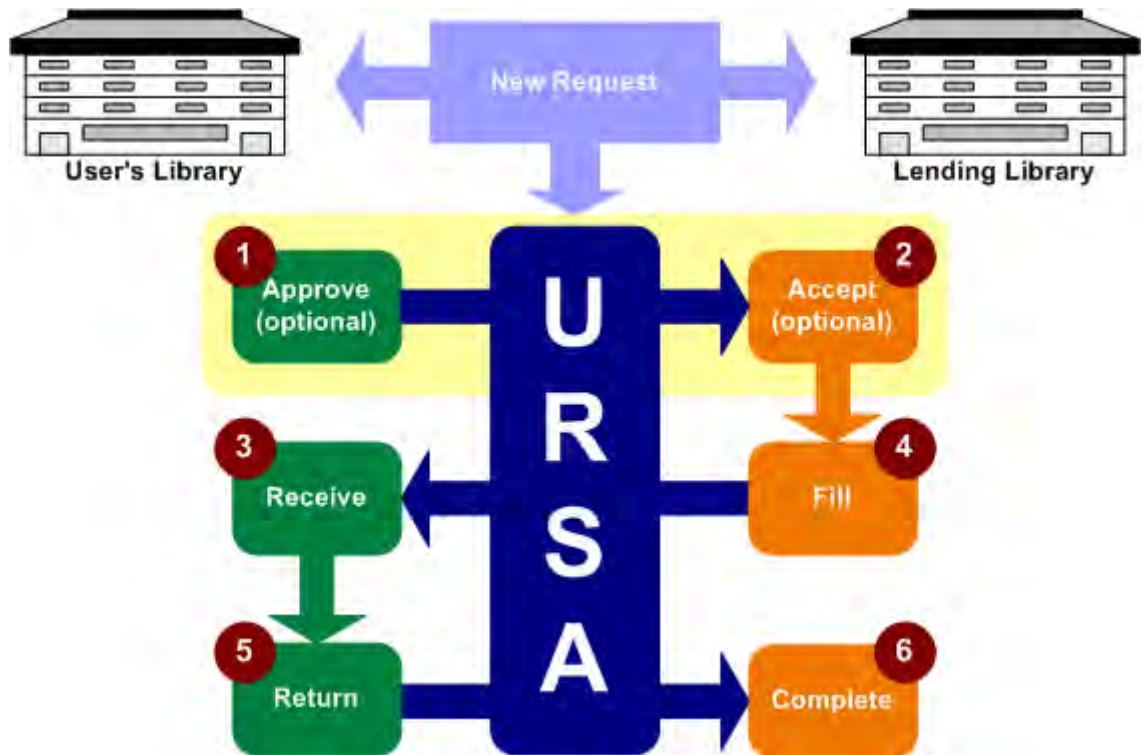
URSA helps users locate items by searching local and non-local library catalogs simultaneously, and displaying search results. If the user wants to request an item from a non-local source, URSA then guides the user through the process of requesting the item through interlibrary loan

URSA Automates ILL for Library Staff

URSA works with your library's local circulation system to help staff manage both requests for items and loans to other institutions. URSA helps staff locate requested items on the library shelves, send user and peer notifications for items requested or loaned, check out and check in items, and create short bibliographic records. URSA also lets staff mediate requests or intervene in the lending or borrowing process whenever necessary.

URSA Streamlines Staff Workflows

This workflow diagram combines the actions taken by an URSA user or administrator with a description of what URSA displays following those actions. This helps illustrate how URSA responds to user or administrator input and processes URSA requests.



This figure shows the basic URSA workflow between lending and borrowing libraries when a user makes an ILL request. The user workflow describes the steps that a library user follows to request an item from a lending library. The lending library workflow describes the steps that a library follows to fill a loan (step 1) and check in the item that has been requested by another library. The user (or borrowing) library workflow describes the steps that a library follows to request a library item from another library and receive an item from a lending library (step 2). When the user is finished with the borrowed item, it is returned (step 3). Finally, the lending library checks in the item to complete the interlibrary loan cycle (step 4).

Placing ILL Requests with URSA

Requests are placed through Information Portal. This chapter will discuss creating a portal user, basic searching, placing requests, and monitoring requests to check their status.

After completing this chapter, you will be able to:

- Create an Information Portal user.
- Log in to Information Portal.
- Use basic searching techniques.
- Place a request.
- Monitor the status of a request.
- Cancel a request.
- Renew a request.

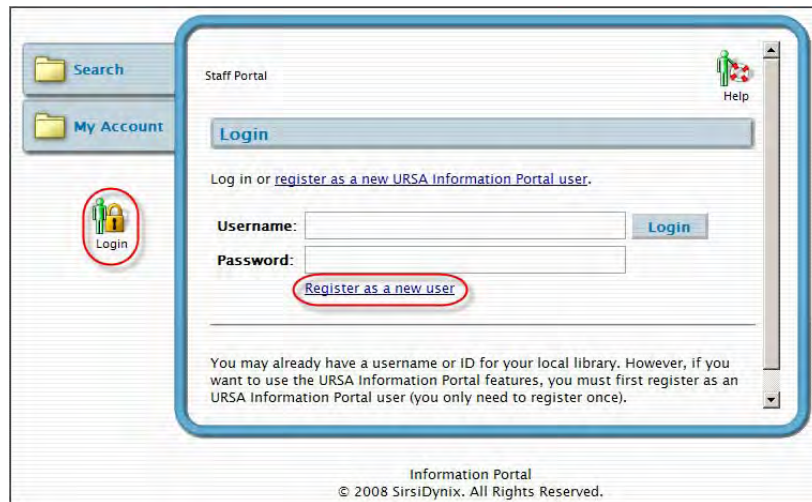
Creating a User

A user must register before searching and placing requests in the portal.

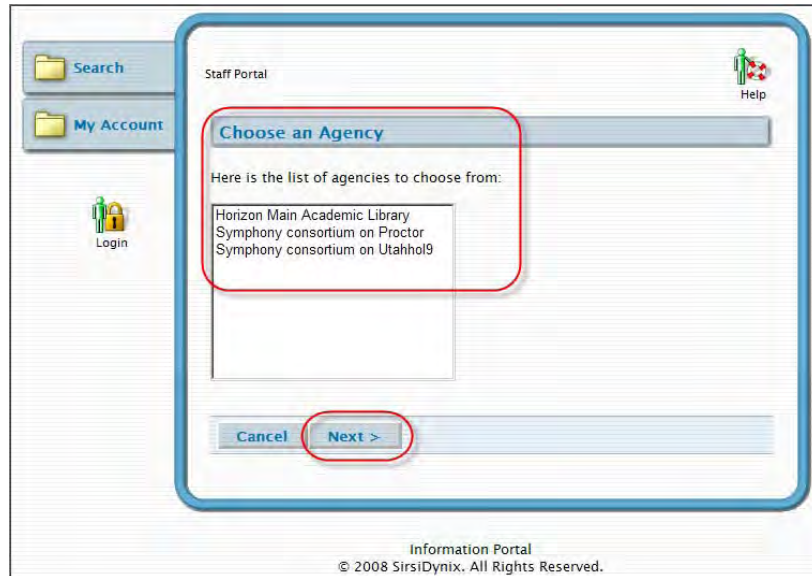


Create a new user in the URSA Information Portal.

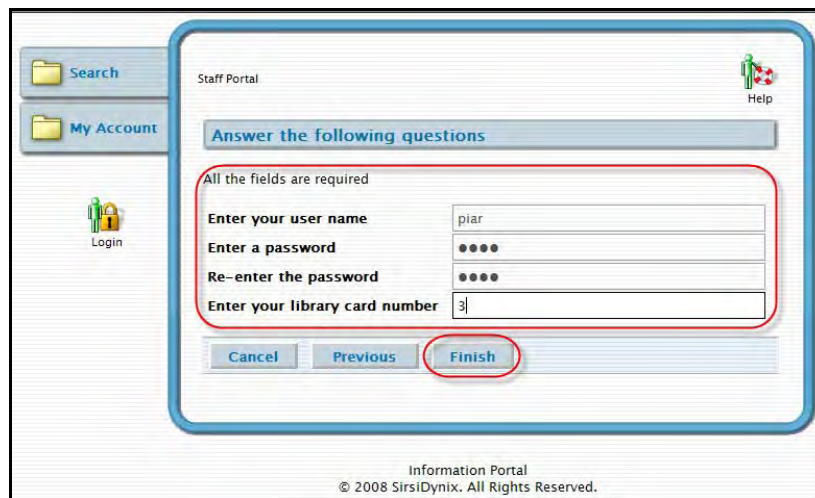
1. Connect to the URSA portal for your library



2. Click the **Login** button.
3. Click the **Register as a new user** link.
4. Select the agency or library where the user is a registered patron and click **Next**.



5. Fill in the following information:



- **User Name.** The unique user name you will use to log onto URSA. It may require trying several names before a unique user is created. (e.g., kbonney may need to be kbonney33)
- **Password.** The password you will use to log into the URSA portal (minimum of six characters). If the patron's library requires a pin number, this becomes the patron's password and will not be required to create an original password.
- **Enter your library barcode.** The patron must enter their library barcode number for authentication. RPA, (Remote Patron Authentication) is used to locate the patron's record and to make sure they are a valid user, according to their library's policies as reflected in RPA.



These questions may vary depending on your library.

6. Click Finish.

This user record is stored on the URSA portal database and not stored in the library database or local Horizon Information Portal database.



This new login now becomes the patron's entry into the URSA portal. Additional logins may be created at any time with the same patron barcode. However, there will only be one 'My Account' for each patron barcode.

Logging in to URSA Information Portal

After you register in URSA Information Portal, you must log in to search and place requests.



Log into the URSA Information Portal.

1. Connect to the URSA portal for your library

2. Enter the username and password that you entered when registering as a new URSA portal user.

3. Click **Login**.

A searching screen similar to the following appears:

Searching on Information Portal

The URSA Information Portal has a wide range of indexes and groupings for searching. The most common setup is to provide tabs for Simple Searches, Advanced Searching (Boolean), and Search History.

- **Keyword.** Searches for items by information such as title, contents, subject, author, and series.
- **Exact match.** Searches for specific records by supplying unique information such as ISBN, ISSN, or OCLC number.



Do a Subject Keyword search for Art History.

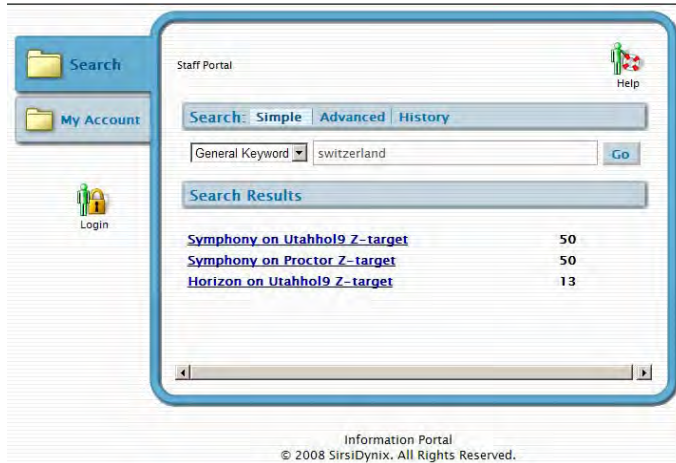
1. Enter Art History in the Subject Keyword field.

2. Click the appropriate catalogs you want to search, if a list is present.



Many libraries have their Z39.50 search targets automatically profiled in the background so that users do not need to take this extra step.

You can also choose to remove the duplicate titles in the event that multiple libraries have an available copy of the item. If you do not check the **Remove duplicate titles?** checkbox, the following screen appears:



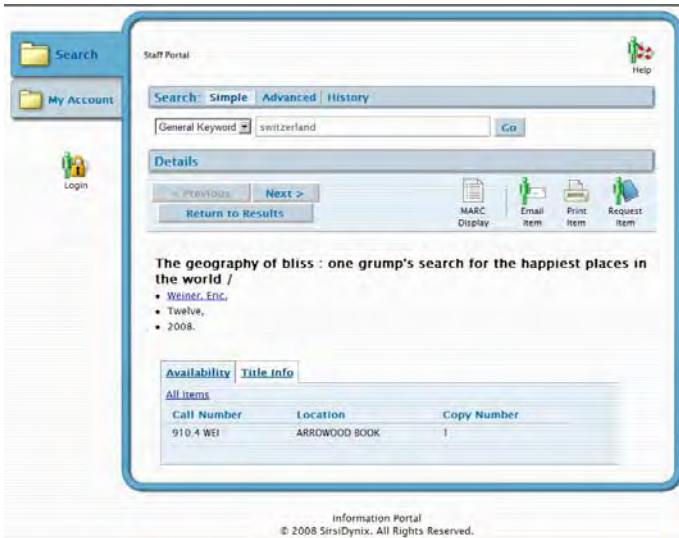
When searching without de-duping, you will see the number of hits at each library, even though the same title may be in each list of results.

3. Check the **Remove duplicate titles?** checkbox and click **Go** to conduct the search.



When Removing duplicate titles is activated, the number of matches per library displays at the top of the window in a bar with the label 'Search Results'. (For example. The title A History of Art from Prehistoric Times to the Present may have an item at several of the different locations that were searched).

4. Click a title to see the de-duplicated results. You can also click on the link to reach the owning library and see current availability.

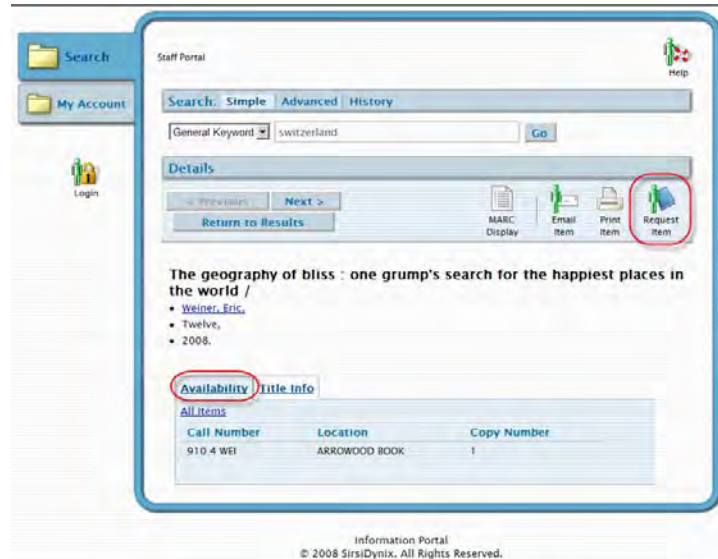


Placing a Request

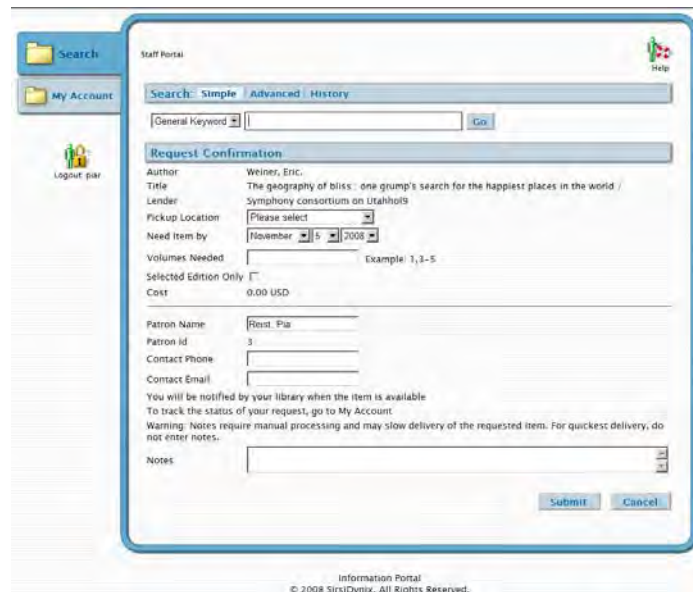
Once you've found the item you want, it's time to place the request. Be sure to check availability first to see which libraries have the item and check the status, availability and hold status.



Place a request on the selected item.



1. Click **Request Item** to place the request.
2. Specify the information on the request screen.



- Confirm the title and lender.
- Specify the pickup location.
- Specify the latest date to receive the item.
- Specify the volume, if applicable.
- Specify whether the selected edition is the only one desired.
- Note the cost, if applicable.
- Change the contact phone number and email address if necessary.
- Enter a note if necessary.



A specific edition request may slow down the interlibrary loan process while the library is waiting to send the specific item instead of sending an item they may have on the shelf. Therefore, the default is to allow any edition to be used in filling a request.

A library may require the user to check a box to acknowledge that they will pay for any cost accrued during the interlibrary loan transaction.



Adding a note may slow delivery of the item. Read the warning on the Request Confirmation window.

The text accompanying this checkbox is supplied by the user's home library. The following is an example:

Staff Portal

Search: Simple | Advanced | History

General Keyword Go

Request Confirmation

Author: Weimer, Eric
Title: The geography of bliss : one group's search for the happiest places in the world /
Lender: Symphony consortium on Utahholo9
Pickup Location: Proctor - Cañon Library
Need Item by: November 5 2008
Volumes Needed: Example: 1,1-5
Selected Edition Only:
Cost: 6.00 USD

Patron Name: Reist, Pia
Patron Id: 3
Contact Phone: (801-222-7333)
Contact Email: pia@irsisdynix.com

You will be notified by your library when the item is available.
To track the status of your request, go to My Account
Warning: Notes require manual processing and may slow delivery of the requested item. For quickest delivery, do not enter notes.

Notes:

Submit Cancel

Information Portal
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3. Click **Submit**.

Staff Portal

Search: Simple | Advanced | History

General Keyword Go

Request Placed

Thank you for placing your request.

Request Number: 7 **Expires on:** 11/5/2008 **Amount Owed:** 0.00 USD
Patron Name: Reist, Pia **Patron id:** 3

Your request for "The geography of bliss : one group's search for the happiest places in the world /" has been successfully placed. You will be notified when the item is available.

[Return to Search Results](#)

Information Portal
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The Request Placed screen confirms the request has been submitted by displaying a request number and displaying the basic information about the request so that a patron can print it, if desired.



If your site has activated email notification, the requestor will also receive an email.

Following is an example of an email notification:

```
From: City Library System [mailto:library@city.org]
Sent: Friday, September 26, 2008 12:14
To: John Smith
Subject: Request 1858 Requested

Request Number: 1858                               Expires on: 24 October 2008
Patron Name: Smith, John                           Patron id: 29154000000467
Your request for "Cowboying: a tough job in a hard land /" has been
successfully placed at County Library System.
```

Monitoring the Status of Requests

Users can easily monitor the requests that have been placed and cancel or renew a request, if necessary. This information is made available by accessing My Account from Information Portal.

Viewing Your Requests



View requests through My Account.

1. Log into Information Portal.
2. Click the **My Account** tab.
3. Click **Remote Holds**.

The screenshot shows the 'My Account' page in the Information Portal. The page has a navigation menu on the left with 'Search' and 'My Account' tabs. The main content area is titled 'Staff Portal' and includes a 'My Account' section with sub-tabs for 'Patron Overview' and 'Remote Holds'. Below this is an 'Email the Library' button. The 'Requests Received' section states 'You have no items ready to be picked up'. The 'Requests Pending' section has a 'Cancel' button and a table of pending requests.

<input type="checkbox"/>	Requested Title	Status	Lender	Request Id
<input type="checkbox"/>	The geography of bliss : one grump's search for the happiest places in the world / by Werner, Eric. Date Placed: 10/15/2008 Pickup Location: Proctor - Caffey Library Cost: \$0.00	Processing Request	Symphony consortium on Proctor	7
<input type="checkbox"/>	Trout and salmon flies : a guide / by Sutherland, Douglas, 1919- Date Placed: 10/15/2008 Pickup Location: Proctor - Caffey Library Cost: \$0.00	Processing Request	Symphony consortium on Proctor	11

Information Portal
© 2008 SirsiDynix. All Rights Reserved.

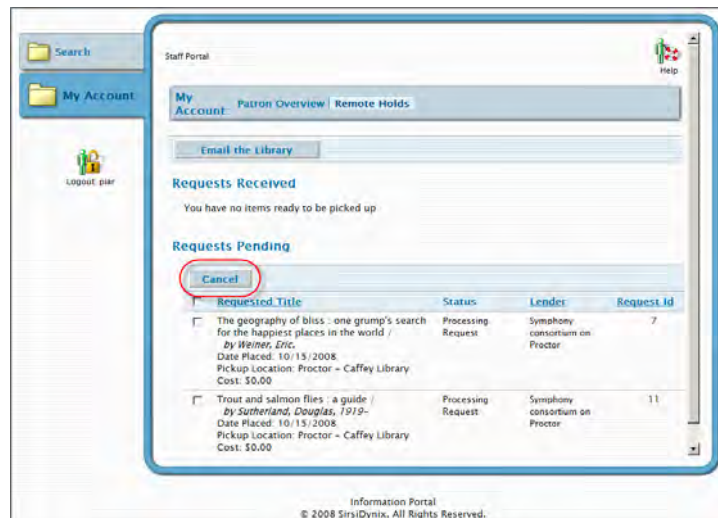
The following information displays:

- Title of requested item
- Status of the request
- Lending library
- Request id

Cancelling and Renewing Requests

The user can renew a request by marking the check box next to the title and clicking the Renew button.

The user can cancel a request as long as it has not been filled by marking the checkbox next to the title and clicking the Cancel button.

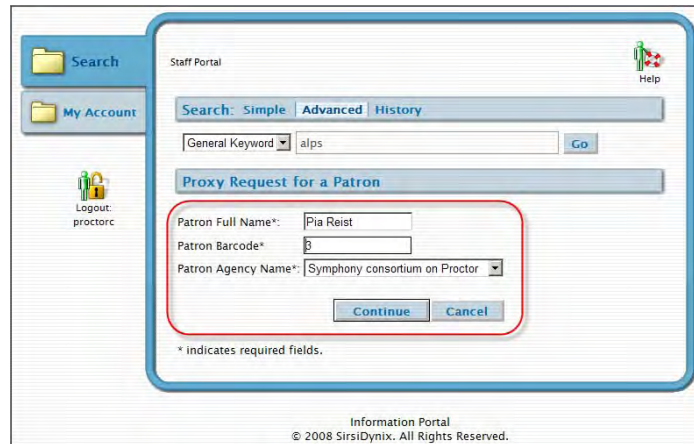


Once a request is filled, the lending library has already processed the request and any loan fees would still be charged to the borrowing library.

Staff Placing Requests for Users

A staff member may place a request for a patron through URSA. Staff use the same workflow as users but may log into a separate portal with a more powerful user interface. This enables public services staff to become more involved in placing requests for and with patrons. The biggest difference for staff is that when placing the request, the staff member must enter the borrowing patron name and barcode.

When a staff member logs into Information Portal with an URSA staff login and clicks Request Item, the Proxy Request for a Patron screen appears where the borrower can be identified before the request process continues.



The screenshot shows the 'Staff Portal' interface. On the left, there are navigation links for 'Search', 'My Account', and 'Logout: proctorc'. The main content area is titled 'Staff Portal' and contains a search bar with 'Simple', 'Advanced', and 'History' options. Below the search bar is a 'General Keyword' dropdown set to 'alps' and a 'Go' button. The primary section is 'Proxy Request for a Patron', which is highlighted with a red border. It contains three required fields: 'Patron Full Name*' with the value 'Pia Reist', 'Patron Barcode*' with the value '3', and 'Patron Agency Name*' with a dropdown menu showing 'Symphony consortium on Proctor'. There are 'Continue' and 'Cancel' buttons at the bottom of this section. A note below the fields states '* indicates required fields.' The footer of the page reads 'Information Portal © 2008 SirsiDymix. All Rights Reserved.'

In addition to placing requests on items, users can also place a request for copies of articles or other information.



When making a copy request, the user must submit the name of the journal, title of the article, pagination, and enumeration for the lending library to properly find and send the copy request.

Additional URSA Portal Features

There are several additional features provided by the URSA portal.

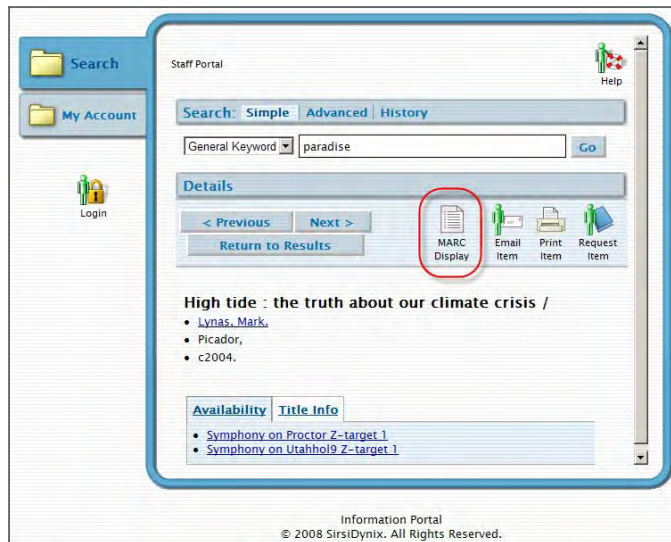
MARC Display Information

When viewing the bib detail window, the user can click the MARC display link to display the record in its MARC format.

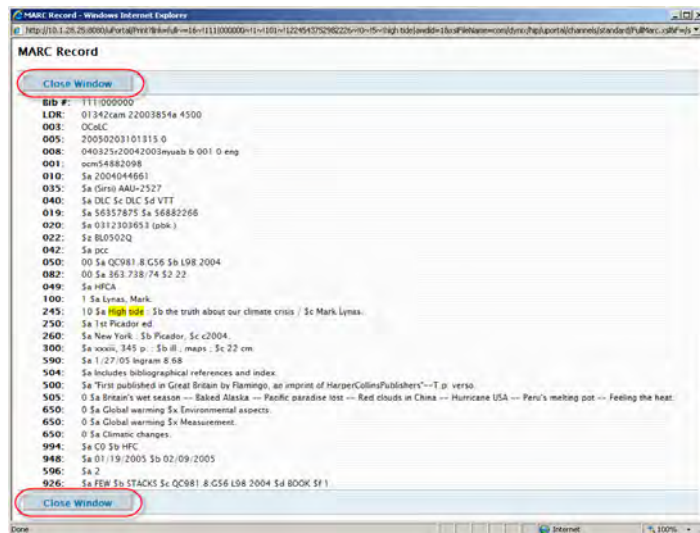


View the MARC display.

1. Access a bib display screen.



2. Click MARC Display.



Information Portal displays the MARC display in a separate browser window. Click **Close Window** to close the MARC view.

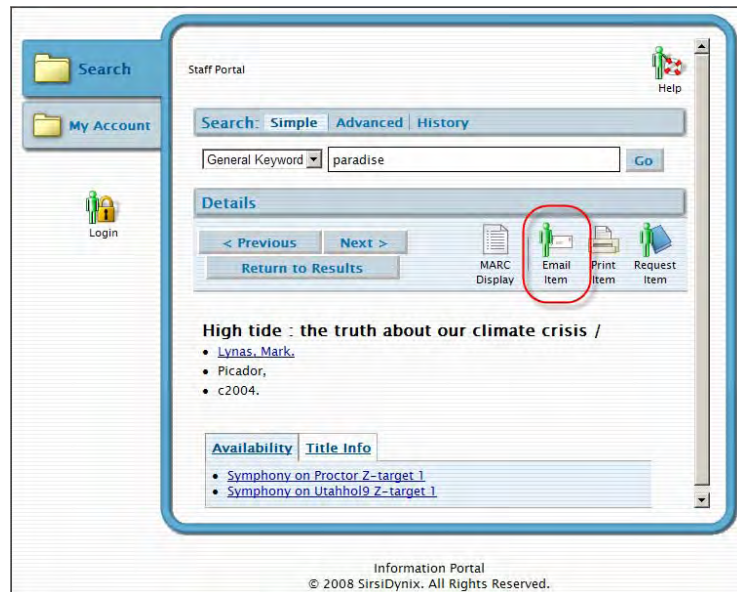
Send Email

The patron can choose to send an email message with the full bibliographic information for the item.

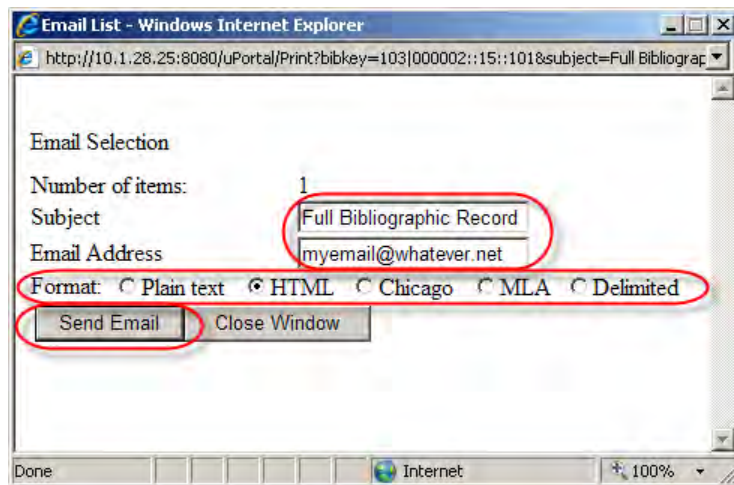


Email full bibliographic information.

1. Access a bib detail screen



2. Click **Email item**.



3. Enter an appropriate subject line for the email.

4. Enter the email address.
5. Select the format
6. Click **Send Email**.

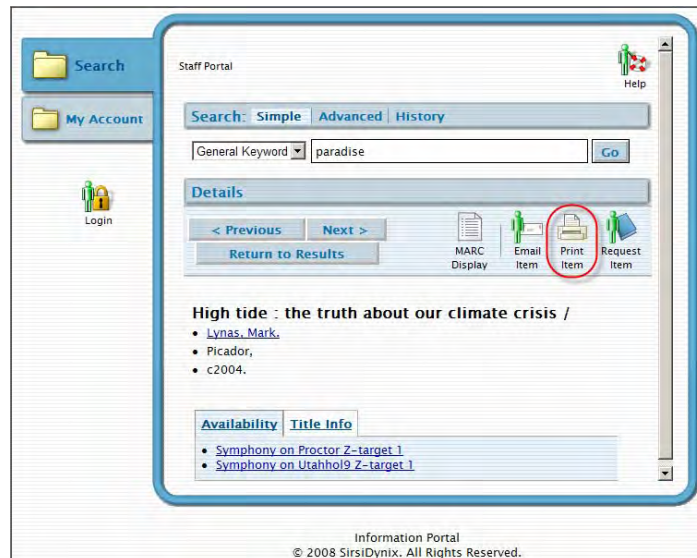
Print Item Information

The patron has the ability to print the item's information to their local printer.

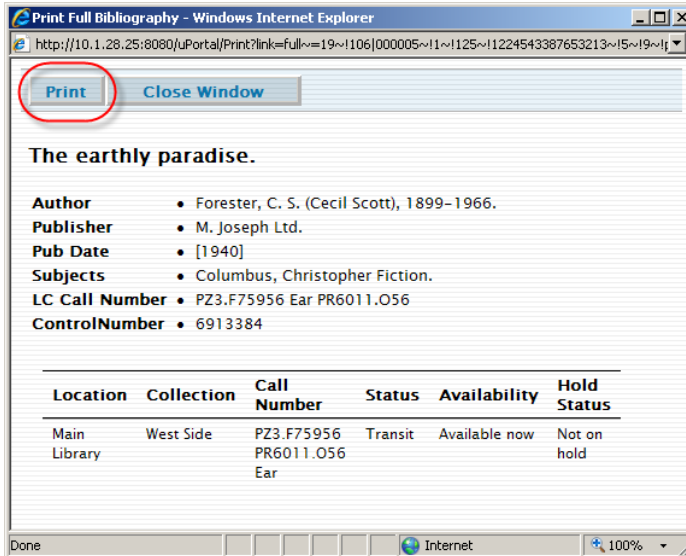


Print item information.

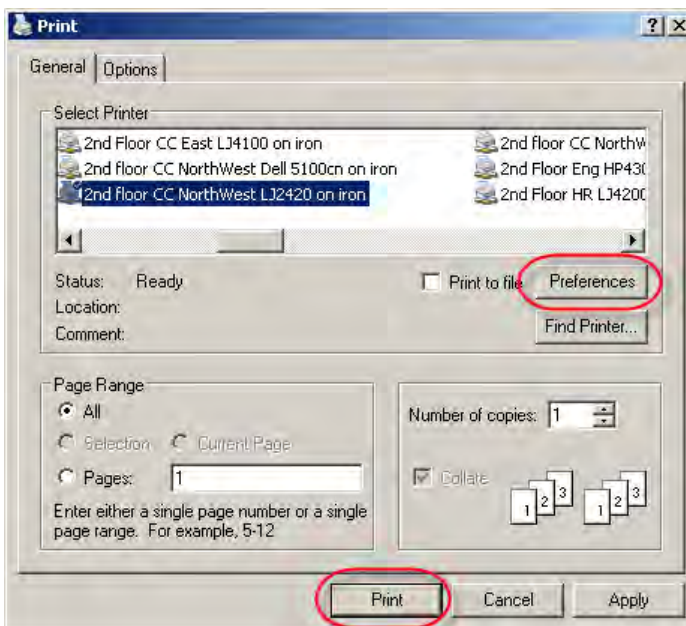
1. Access a bib record.



2. Click **Print Item**.



3. Click **Print**.



4. Select your printer settings and click **Print**.

5. Click **Close Window**.

Multiple Index Searching

A complete discussion of all the options available for searching through Information Portal is outside the scope of this class. However, it is important to know that you can use Boolean searching techniques to search multiple indexes at once. The following screen shows an example of searching both the Author Keyword and Title Keyword indexes.

The screenshot displays the Information Portal search interface. The search bar is set to 'Simple' search mode. The search criteria are: Author Keyword: Atimov; Title Keyword: Space; Author Keyword: (empty); ISBN Keyword: (empty). The search results section is empty, and the footer indicates 'Information Portal © 2006 SirsiDymix. All Rights Reserved.'

Index	Keyword	Operator
Author Keyword	Atimov	AND
Title Keyword	Space	AND
Author Keyword		AND
ISBN Keyword		

URSA Staff Management

The URSA Launcher provides staff functions for managing ILL requests. Tasks for both the borrowing and lending libraries are managed in the same way.

After completing this chapter, you will be able to:

- Place requests.
- Mediate requests.
- Pull items for routing to a borrowing library.
- Prepare items for shipping.
- Fill a request.
- Receive a request at borrowing library.
- Notify borrower of availability.
- Manage checkout and checkin of requested items.
- Process return of item to lending library.

Using the URSA Staff Client

Logging In

The URSA client allows access to all staff functions. You must first log into the client.



Log into URSA.



1. Double-click the URSA Staff Client icon on the computer.

URSA Login

Universal Resource Sharing Application

URSA

SirsiDynix

User Name: kathy

Password: *****

OK Cancel

2. Enter your user name and password.
3. Click OK.

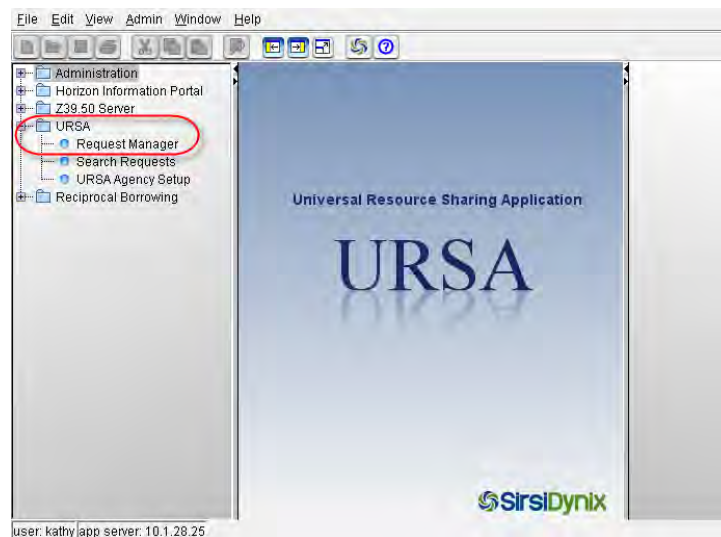
Overview of the Request Manager

Most of URSA's staff tasks begin and end with the Request Manager. Some tasks are lending-library-specific. Others are only for borrowing libraries. However, you perform several tasks in the same way, regardless of whether you are a lending or borrowing library. The staff is given specific security privileges during the implementation process and they will only be able to access the tasks for their privilege level. Some staff may be able to view administrative information by clicking on them in the launcher, but they will not be able to make changes unless authorized to do so.

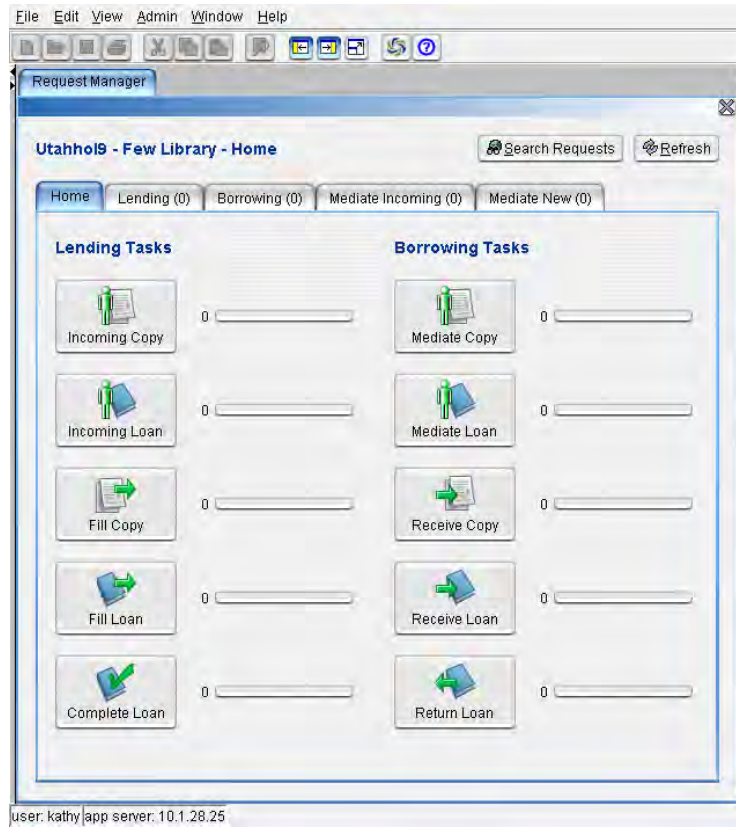


Open the Request Manager.

1. Log into URSA.



2. Select **Request Manager** from the Navigation bar.



Lending Library Workflow and Tasks

The lending library has the option of using an automated workflow for filling requests or mediating the process.

Automated Lending Workflow Tasks

The following is a description of the steps in the automated workflow:

- **Hold is placed.** When URSA assigns a lending library, URSA automatically checks for the title's availability and, if the title is found, places the title on hold at the lending library. This is a bib level hold and local holds logic is used inside the ILS to determine which agency (branch) is assigned as the loaning agency.
- **Mediate, if desired.** Libraries that prefer to mediate requests can review all requests and approve or decline them manually and print a picklist to use for pulling the items from the shelves. Mediation will be discussed in the next section.
- **Pull the items for routing.** If URSA places the item on hold, lending library staff can use their local circulation holds list or URSA's pick list to search for the actual item. When they fill the hold in the ILS, they are directed to route the item to the ILL Department.
- **Prepare the item for shipping.** If staff finds the item on their shelves, they prepare the item to send to the borrowing library.
- **Fill the request.** The lending library fills the request for an interlibrary loan by accessing the Request Manager in URSA. This updates URSA with the filled request information.
- **Complete the loan.** The lending library completes the request for an interlibrary loan by accessing the Request manager in URSA.
- **Checkin the item.** When the item is returned, staff checks in the item on the local circulation system if necessary.

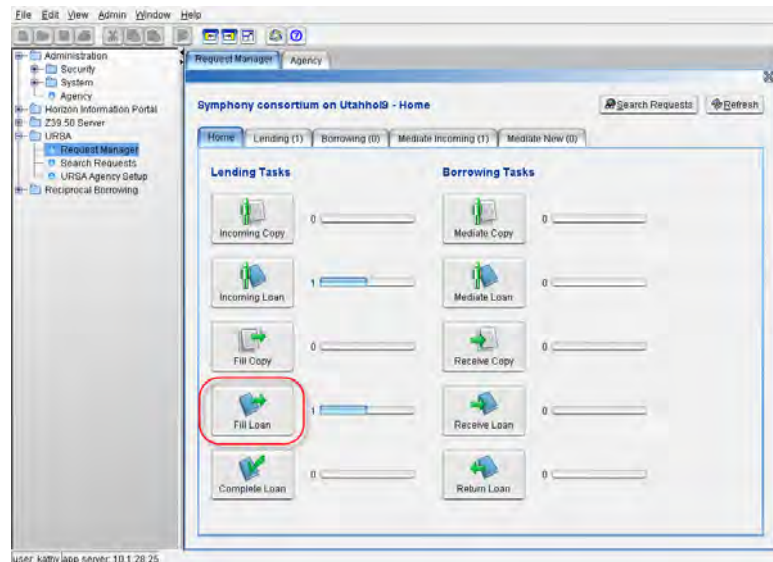
Filling a Request in URSA

Filling a request updates URSA with the filled request information. This way, users can check on their request and URSA can automatically update the borrowing tasks as necessary.

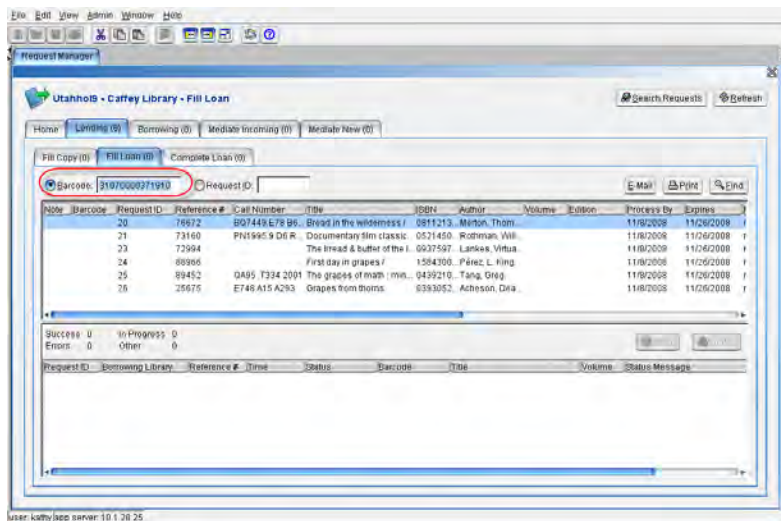


Fill a request in URSA.

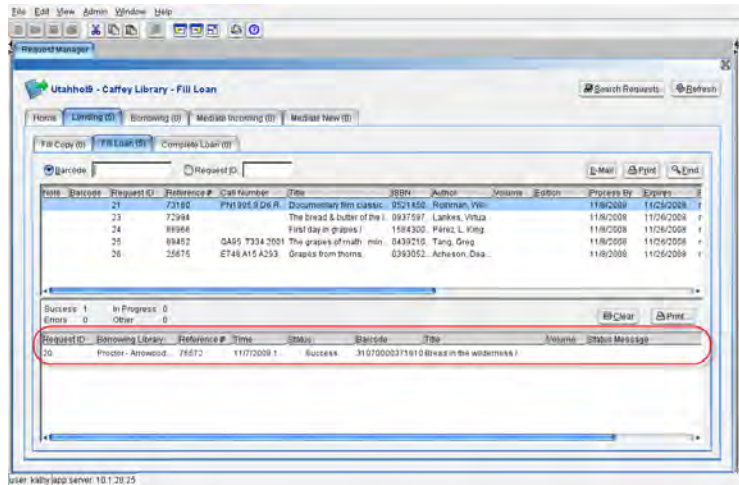
1. Click on the **Fill Loan** icon in Request Manager.



2. Highlight the title of the item that will fill the request. Be sure to match the title to the item.
3. Enter the barcode of the item.



- The request will now move to the bottom of the screen. Please note the Status of the item is now Success. URSA has automatically checked out the title on your library's circulation system. The title is checked out to a patron barcode that has been defined on your circulation system by your system administrator.



- The request is now filled and ready to be shipped. You may right-click and print a label or wrapper that may be attached to the item.

URSA may deliver an email to the patron who requested the material if desired. An example of the filled email is shown below:

From: City Library System [mailto:library@city.org]
 Sent: Friday, September 26, 2008 13:15
 To: John Smith
 Subject: Request 1858 Filled

Request Number: 1858 Expires on: 24 October 2008
 Patron Name: Smith, John Patron id: 2915400000467
 Your request for "Cowboying: a tough job in a hard land /" has been shipped from Howard County Library System. You will be notified when this item is available for pickup at City Library System.

Completing the Loan Cycle

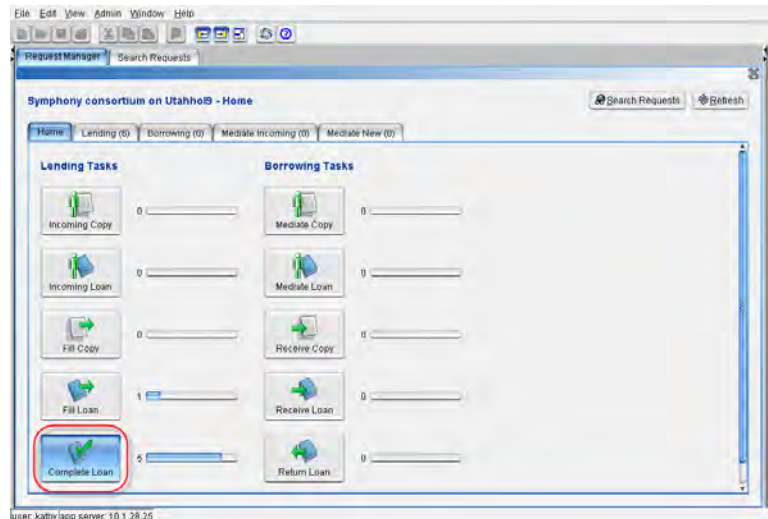
When you fill a request, URSA checks out the item automatically to the borrowing library in the lending library's circulation system. When the lending library receives the returned item, you must complete the loan process. The following describe the steps you must take:

- **Complete the loan.** The lending library completes the request for an interlibrary loan by accessing the Request manager in URSA.
- **Checkin the item.** When the item is returned, staff checks in the item if necessary to the local circulation system.



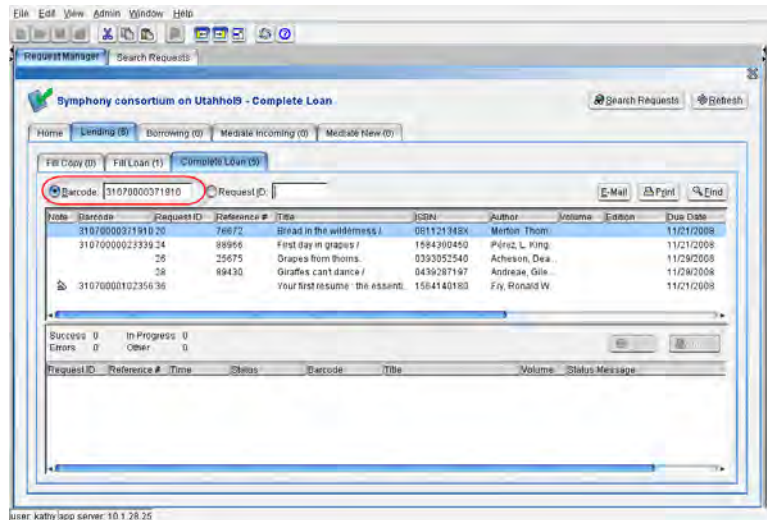
Complete the loan cycle.

1. Click on the **Complete Loan** icon on the Request Manager.

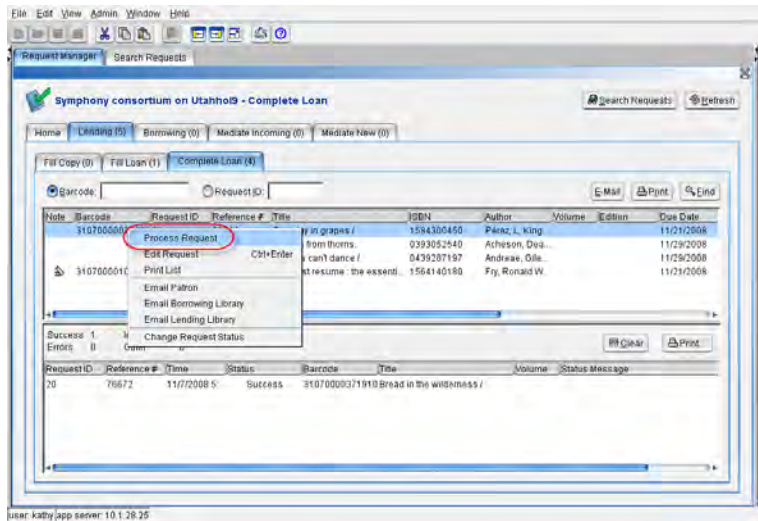


2. Do one of the following:

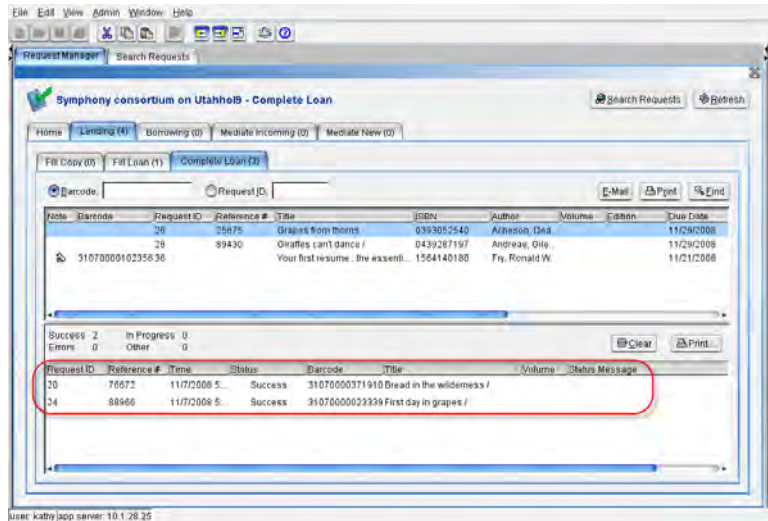
- Enter the item's barcode at the top of the screen.



- Right-click on the title you want and complete the request by clicking **Process Request**.



The completed request has now moved to the bottom of the screen.



URSA may deliver an email to the patron who requested the material if desired. An example of the completed email is shown below:

From: City Library System [mailto:library@city.org]
 Sent: Friday, September 26, 2008 13:22
 To: John Smith
 Subject: Request 1858 Completed

Request Number: 1858 Expires on: 24 October 2008
 Patron Name: Smith, John Patron id: 29154000000467
 The item you borrowed, "Cowboying: a tough job in a hard land /", has been returned to County Library System and your Interlibrary Loan transaction is complete.

3. The request process has been completed in URSA. However, it may be necessary to check in the item in the local circulation system.

Mediated Workflow Tasks—Lending Library

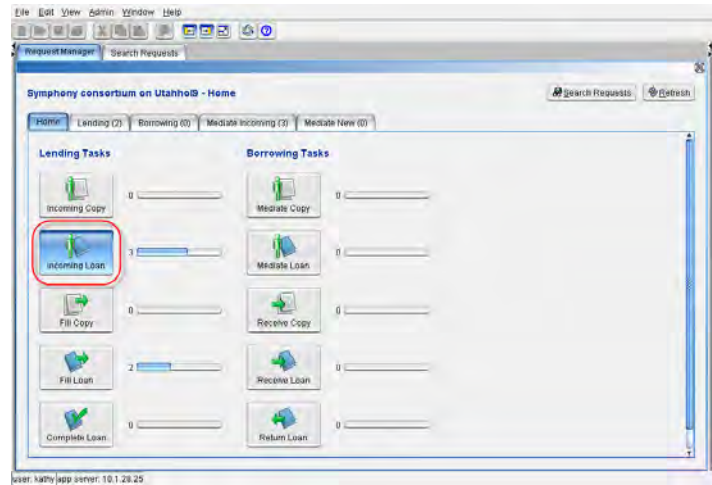
Libraries that prefer to mediate requests or have requests go to mediation based on availability rules can review all requests and approve or decline them manually and print a picklist to use for pulling the items from the shelves. The following is a description of the steps in the mediated lending workflow:

- **Approve the request.** Staff approves the request by clicking on Incoming Loan button and enters a request number or right-clicks and chooses Process Request.
- **Prepare the item for shipping.** If staff finds the item on their shelves, they prepare the item to send to the borrowing library.
- **Fill the request.** Staff records in URSA that the request was filled by clicking on the Fill Loan button in the Request Manager and enters the request number if the loan is mediated.
- **Checkout the item.** If necessary, staff manually checks out the item in the lending library's circulation system to the borrowing library.
- **Print wrappers and/or labels, if desired.** Wrappers and/or labels may be printed if desired by clicking on the Print button when the item is moved to the lower pane after successfully being processed.
- **Complete the loan.** Staff records in URSA that the item was returned by clicking on the Complete Loan button and enters a request number or right-clicks and chooses Process Request.
- **Check in the item.** When the item is returned, staff checks in the item on the lender's local circulation system if necessary.



Mediate a request for a lending library.

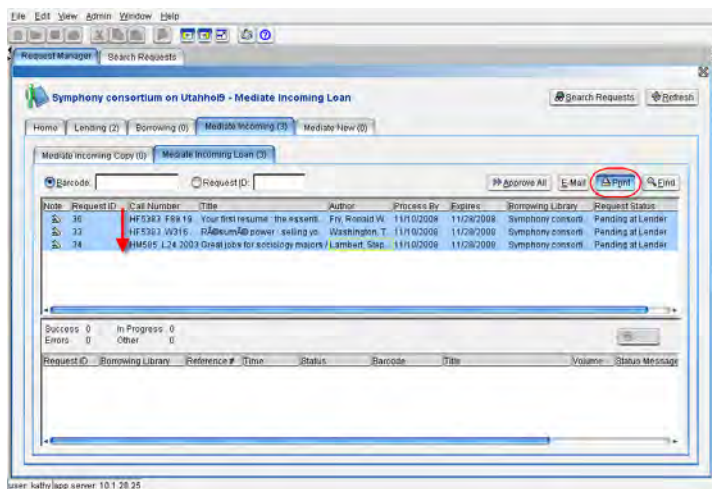
1. Click on the **Incoming Loan** icon on the Request Manager.



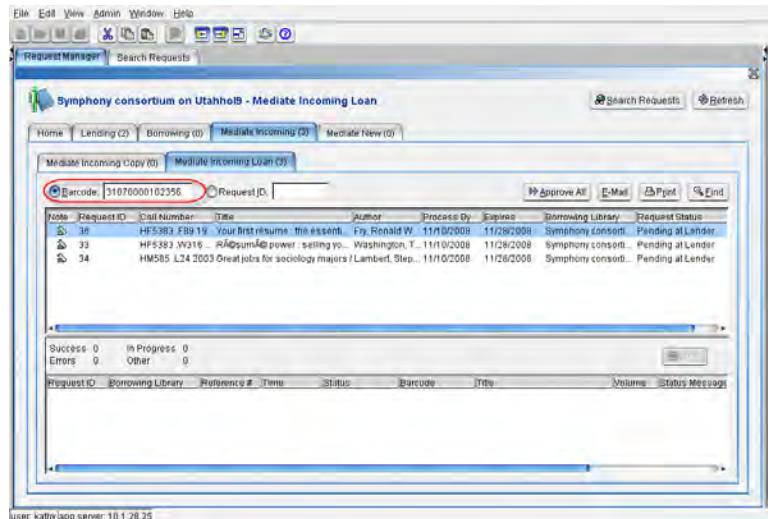
2. Highlight the requests that have been received since you last performed this task.

You may wish to click on a column to re-sort the requests in a convenient order, such as call number or title.

3. Print the list using the Print button. Now you are ready to pull the items from the shelf and note those that cannot be found.



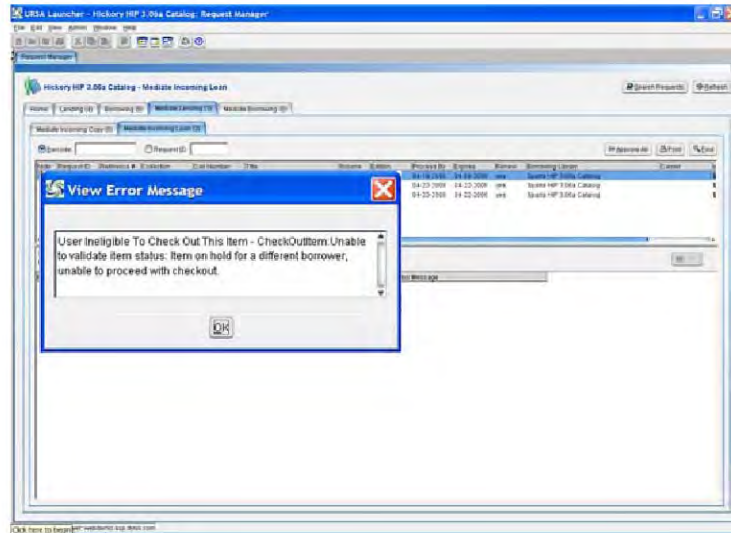
4. To fill the request immediately, highlight the request that you are mediating and enter the item's barcode at the top of the window.



The request will move to the bottom of the window and the Status will be "Success". If you are using automated messaging (mapped or NCIP), this item is automatically checked out in your circulation system when you perform this step.

5. When an item is not available for filling the request, you will see an error message.

In this example, the item was already on hold for a different borrower. You may decline the request to move it to another lender or send it to a branch library, using the right mouse click and change lender. You could leave the request on the list to search for other copies that may be returned before the request expires or is aged to another lender.



You can choose how you want to handle the request, such as declining the request or reassigning it to another lender.

Declining Requests

In URSA 4.x, **Set to Not Available** is no longer a separate task. Instead, staff can either decline a request at the time it is mediated or do that from the Fill Task list. Staff can also use **Search Request** to find a request that has been held but that is not listed in a task screen (as in the case of Shared Catalog sites). The following is a description of the steps in the automated workflow:

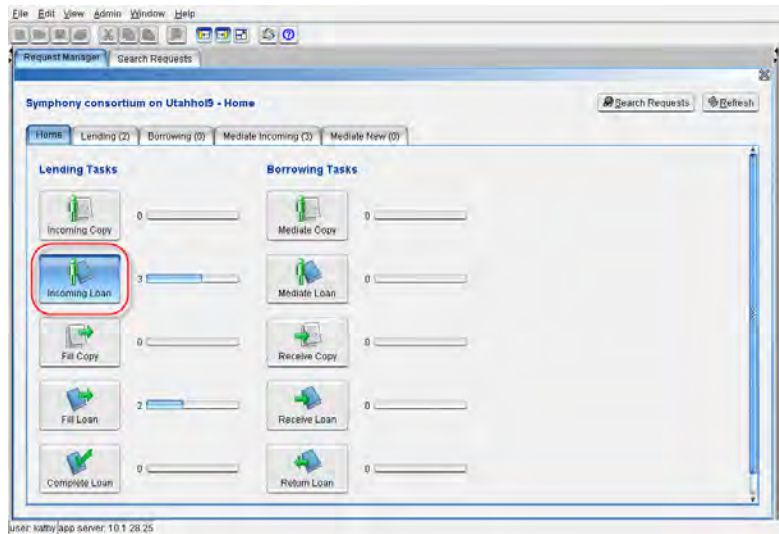
- **Decline the request.** If the item is not found in the lending library or cannot be loaned for any reason, staff declines the request in URSA and assigns the appropriate reason for declining.
- Reassign request if possible. URSA then tries to find another lender using the borrowing library's borrowing sequence. If there are no other lenders available and no lender of last resort, the request can be routed back to staff at the borrowing library to notify the patron that the request cannot be filled or to research other lending options.

You can also decline a request or reassign a request in mediation, if necessary.

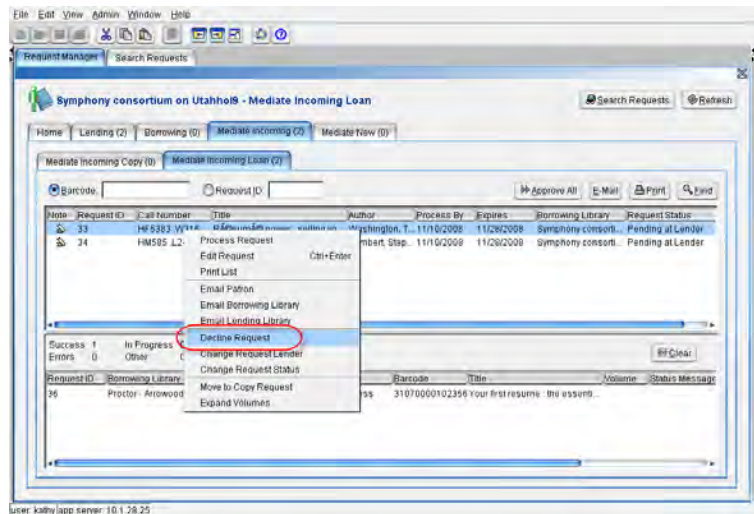


Decline a request.

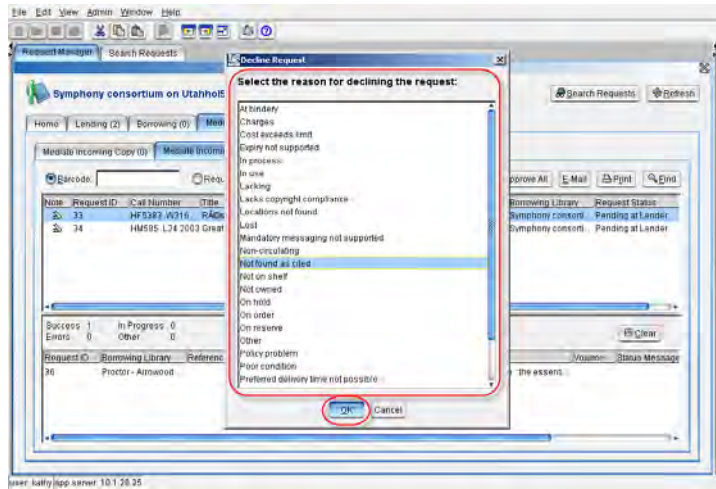
1. Click on the **Incoming Loan** icon on the Request Manager.



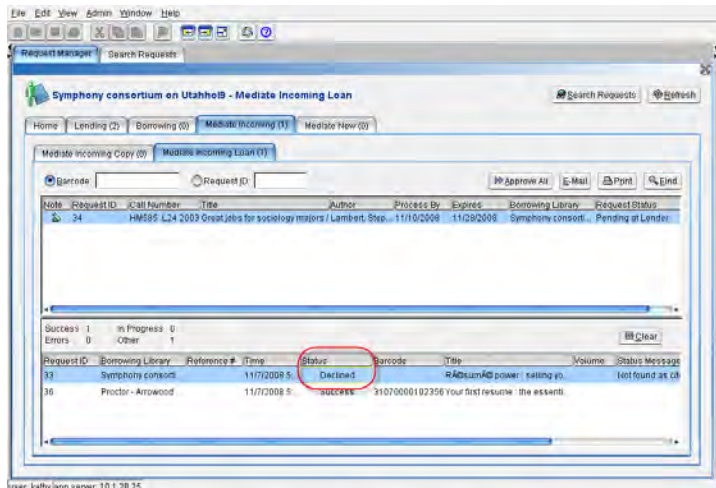
2. Highlight each request that has not been found and decline the request, using the right mouse click.



3. Choose the appropriate reason for declining and click OK.



When this title was searched on the portal, its status was “Withdrawn.” Here the lending library has indicated that the reason for declining the request is ‘Not owned.’”



The request has been declined by the lending library, so now the request returns to mediation at the borrowing library with the status of “Pending at borrowing library.”

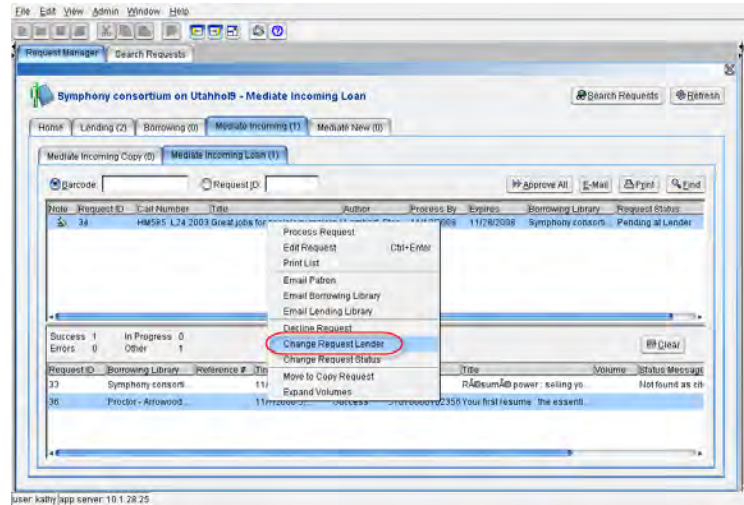
Reassigning a Request to Another Lender

In the automated process, URSA tries find another lender using the borrowing library’s borrowing sequence. If there are no other lenders available and no lender of last resort, the request can be routed back to staff at the borrowing library to notify the patron that the request cannot be filled or to research other lending options.

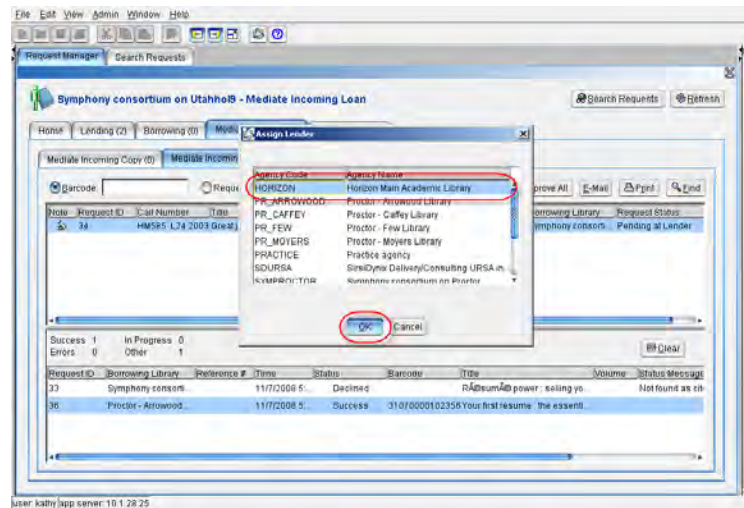


Reassign a request to another lender.

1. Right-click to see the options and then choose **Change Request Lender**.



A pop-up window will appear with a list of libraries from which you are allowed to choose a lender.



Once you choose the lender, the request will no longer appear in the mediated loan box for the lending library. The request is now residing in the mediated loan box at the other lending library you chose.

Borrowing Library Workflow and Tasks

The following is some background information about borrowing libraries:

- **Request placed.** A library user or staff member searches the local library catalog for an available title and makes a request. The request includes designating a pickup location and notification information.
- **Review requests, if applicable.** Libraries that are configured to mediate requests can review all requests before they go to lending libraries by clicking on the **Mediated Loan** button and entering the request number to process the request. Mediation may be configured to be required for all loan requests, all copy requests, all requests placed by certain user types or for all requests going to certain lenders. In addition, requests for which URSA is unable to assign lenders are routed to local staff to mediate and requests that have been declined by the last available lender also become mediated unless a lender of last resort is designated.
- **Manage items found locally.** URSA searches both local and non-local catalogs before assigning lenders. Libraries are able to set a policy in their configuration to control how requests are handled if available items are found locally. One option automatically converts the request to a local hold. The other option tells the patron that the request cannot be placed because the item is owned by their own library.
- **URSA sends request to lending library.** If the item is not found locally, URSA sends the request to the user's chosen lending library. (Lending libraries are supplied as options to the user based on the borrowing library's profiling of preferred partners.) If no available items are found at the chosen lending library, URSA checks other libraries in the borrowing sequence.
- **Item sent to borrowing library.** If a lending library accepts and fills the request, the item is sent to the borrowing library.

Automated Borrowing Workflow Tasks

The following are the tasks that are completed in a automated workflow:

- **Receive the item.** When the item arrives at the borrowing library, staff receives the item in URSA by clicking on the **Receive** loan button and scanning in the barcode. This creates a temporary bib and item record in the local library's database, which can be configured to not display in the local library catalog. Receiving also places a hold on the item for the requester.
- **Print wrapper, if desired.** A wrapper that includes the request information and scannable patron and item barcodes can be printed at this step.
- **Fill and route the item** The circulation department fills the hold that was just placed and routes the item to the desired pickup location.
- **Notify borrower.** URSA or the borrowing library's normal Holds Notices Process lets the requester know that the item is ready for pickup.
- **User picks up item.** The user goes to the chosen pickup location, where staff checks out the item to the user.
- **Send other notifications, as necessary.** If further borrower notification is required (for example, if the lending library recalls the item or if the item becomes overdue), the borrowing library notifies the user.
- **Check in the item.** When the item is returned, staff checks in the item on the local circulation system.
- **Process the return.** Staff records in URSA that the item was returned by clicking on the return loan button and scanning in the barcode or right-clicking and choosing Process Request. This process may delete the temporary bib and item record URSA created when the item was received.
- **Print wrappers and/or mailing labels, if desired.** Wrappers and/or mailing labels may be printed if desired. Staff returns the item to the lending library.

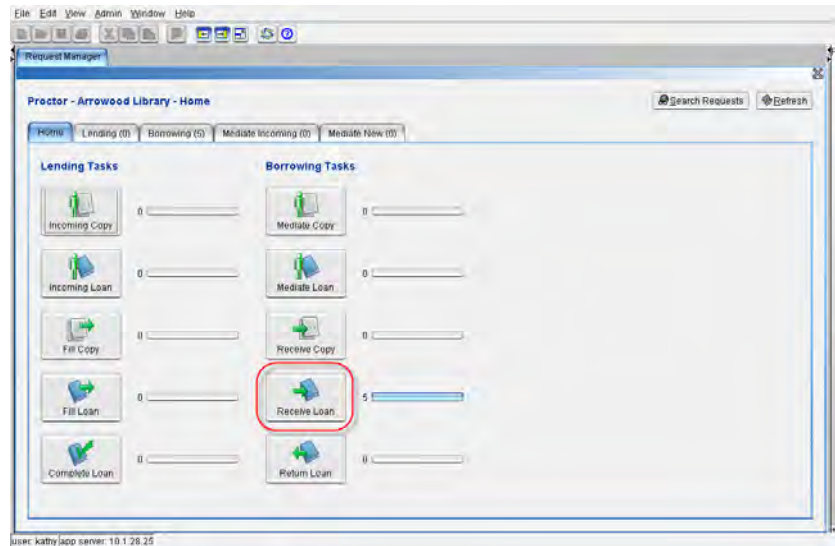
Receiving an Item in URSA

Receiving an item creates a temporary bib and item record in the local library's database, which can be configured to not display in the local library catalog. Receiving also places a hold on the item for the requester.

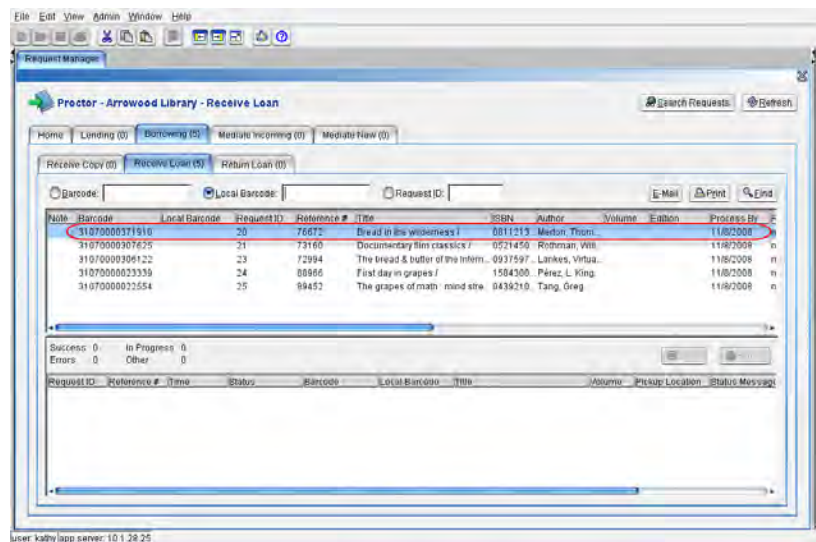


Receive an item.

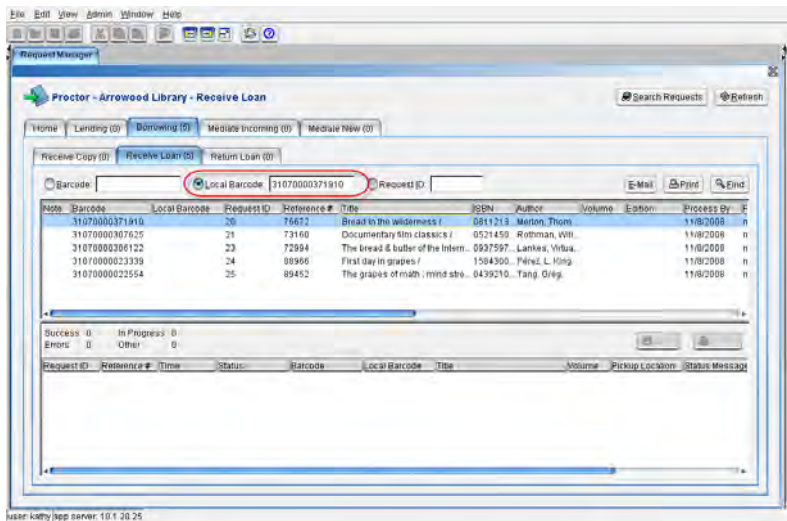
1. Click on the **Receive Loan** icon in Request Manager.



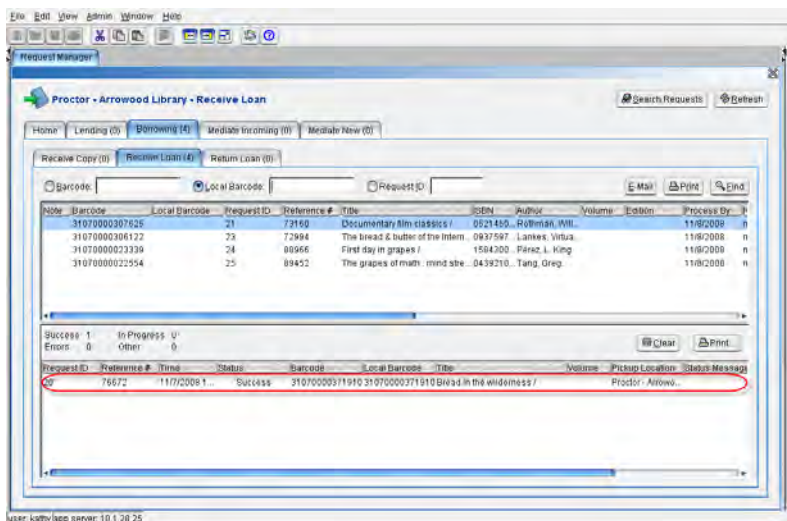
2. Highlight the title of the item you have in hand to receive. Be sure to match the title to the item.



3. Enter the local barcode for your circulation system. You may use the barcode from the lending library or a new barcode from your library circulation system.



URSA will automatically create a short bibliographic record on your local circulation system. URSA will use the barcode you entered to create the item record. The request has now moved to the bottom of the screen.



URSA may deliver an email to the patron who requested the material if desired. An example of the request received email is shown below:

```
From: City Library System [mailto:library@city.org]
Sent: Friday, September 26, 2008 13:21
To: John Smith
Subject: Request 1858 Received
```

Request Number: 1858

Patron Name: Smith, John

Patron id: 29154000000467

The title that you requested, "Cowboying: a tough job in a hard land /", has been received at the Interlibrary Loan department of City Library System. If your library customarily notifies you when they have items for you to pick up, you should receive this notification soon. If the library does not normally notify you, contact them directly about this request.

4. The item can now be checked in using the local circulation system. The item can then be placed on a "hold shelf" and checked out to the patron who requested it.

Mediated Workflow Tasks—Borrowing Library

Libraries that prefer to mediate requests can review all requests and approve or decline them manually, or libraries may need to find a lender for a request, as appropriate. The following is a description of the steps in the mediated borrowing workflow:

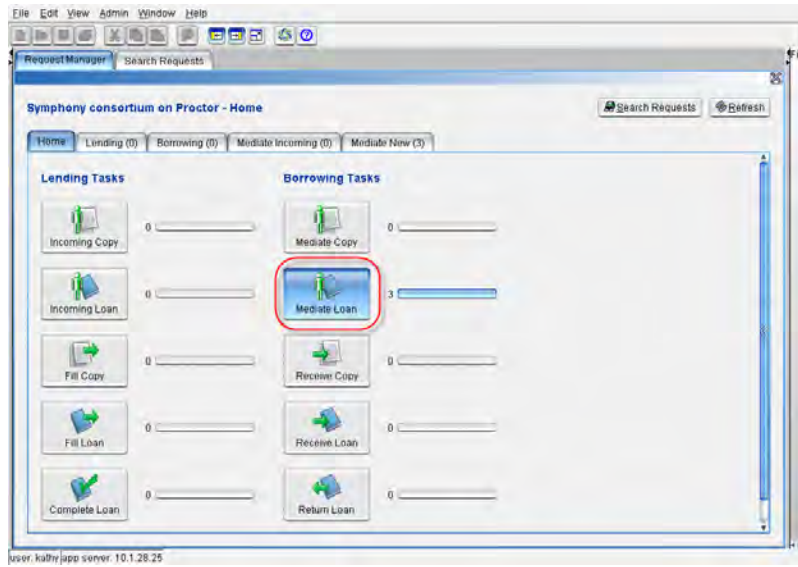
- **Review requests, if applicable.** Libraries that are configured to mediate requests can review all requests before they go to lending libraries by clicking on the **Mediated Loan** button and entering the request number to process the request. Mediation may be configured to be required for all loan requests, all copy requests, all requests placed by certain user types or for all requests going to certain lenders. In addition, requests for which URSA is unable to assign lenders are routed to local staff to mediate and requests that have been declined by the last available lender also become mediated unless a lender of last resort is designated.
- **Receive the item.** When the item arrives at the borrowing library, staff receives the item in URSA by clicking on the **Receive** loan button and scanning in the barcode. This creates a temporary bib and item record in the local library's database, which can be configured to not display in the local library catalog. Receiving also places a hold on the item for the requester.
- **Print wrapper, if desired.** A wrapper that includes the request information and scannable patron and item barcodes can be printed at this step.

- **Fill and route the item** The circulation department fills the hold that was just placed and routes the item to the desired pickup location.
- **Notify borrower.** URSA or the borrowing library's normal Holds Notices Process lets the requester know that the item is ready for pickup.
- **User picks up item.** The user goes to the chosen pickup location, where staff checks out the item to the user.
- **Send other notifications, as necessary.** If further borrower notification is required (for example, if the lending library recalls the item or if the item becomes overdue), the borrowing library notifies the user.
- **Check in the item.** When the item is returned, staff checks in the item.
- **Process the return.** Staff records in URSA that the item was returned by clicking on the return loan button and scanning in the barcode or right-clicking and choosing Process Request. This process may delete the temporary bib and item record URSA created when the item was received.
- **Print wrappers and/or mailing labels, if desired.** Wrappers and/or mailing labels may be printed if desired. Staff returns the item to the lending library.

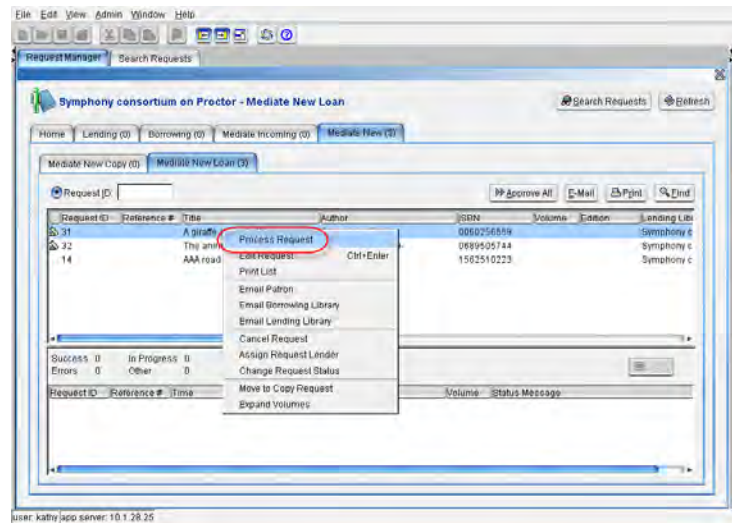


Mediate a request for a borrowing library.

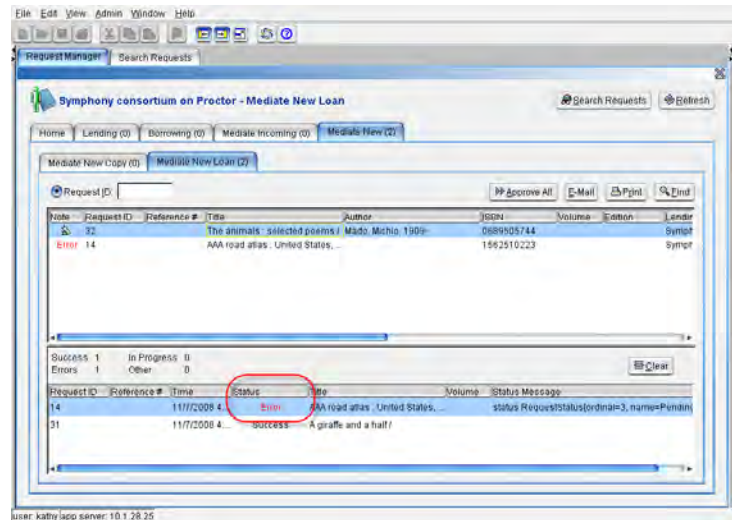
1. Click on the **Mediate Loan** icon on the Request Manager.

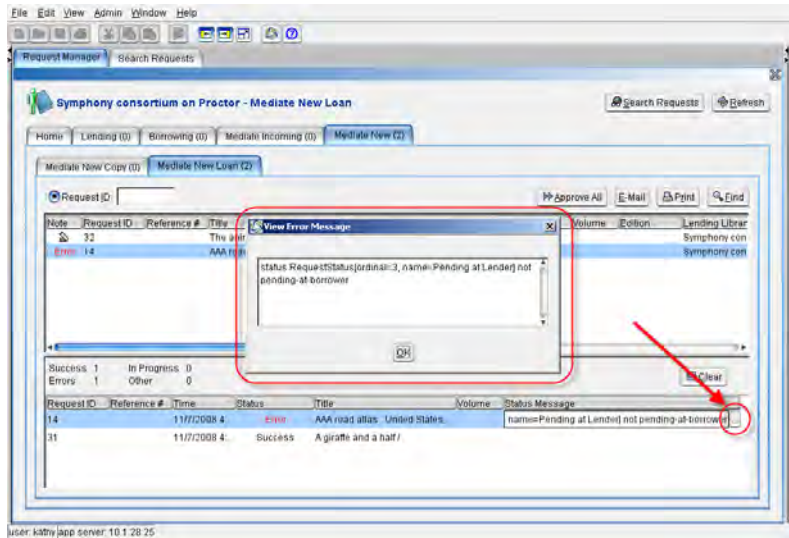


- Highlight the title of the request that you are mediating. Then right-click your mouse for the options.



When you choose **Process Request**, you will receive the following results: If the process is successful, the request will move on to the lending library. If the item is not available, you will get an Error message with an explanation in the Status column. You can also cancel request if they do not meet your policies or if no lenders can be found to supply the requested item. In the example below, the requested item is not available for requesting.





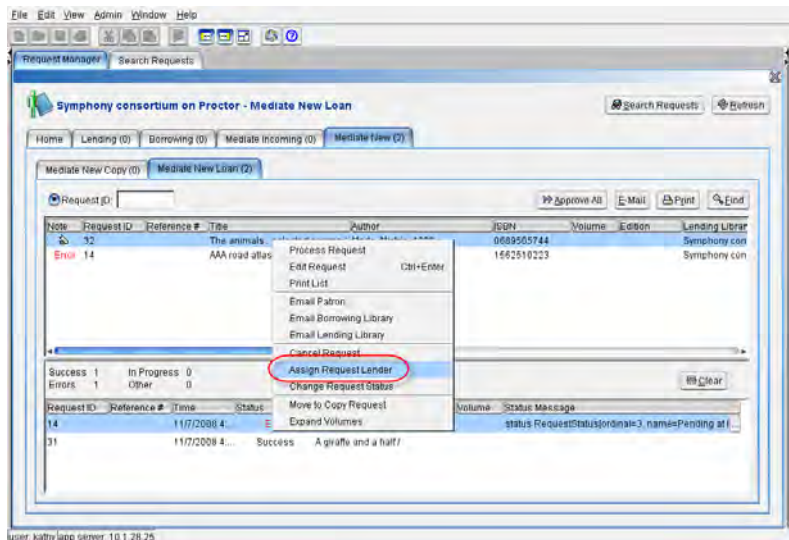
Assigning a Lender

If a request does not have a lender then you can choose one for that request.

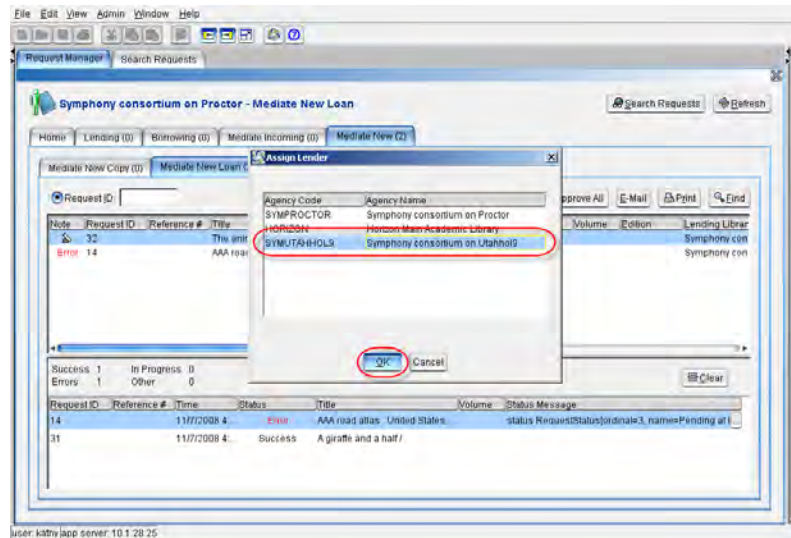


Assign a lender.

1. Right-click to see the options and then choose **Assign Request Lender**.



A pop-up window appears with a list of libraries from which you are allowed to choose a lender.



Once you choose the lender, the request no longer appears in the mediated loan box for the borrowing library. The request is now residing in the mediated loan box at the lending library you chose.



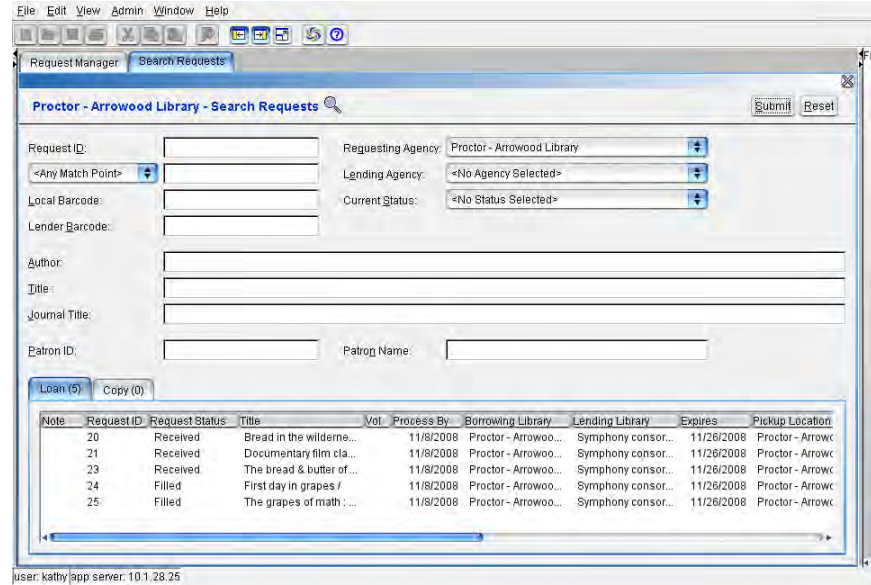
The preferred method of assigning a lender is to double-click a request to edit it, then click the SEARCH option and use that to find a lender. This method only works on requests with control numbers (ISBN, ISSN, OCLC, LCCN), but takes availability rules into account. "Assign Lender" does not. The Assign Lender method by-passes availability completely and means that a borrowing library might request something the lending library does not lend via ILL, such as a DVD. This can cause frustration for the lending library because they think the system isn't working correctly. In the absence of control numbers, it is sometimes necessary to use "Assign Lender," but this should be only done when absolutely necessary.

Monitoring Requests

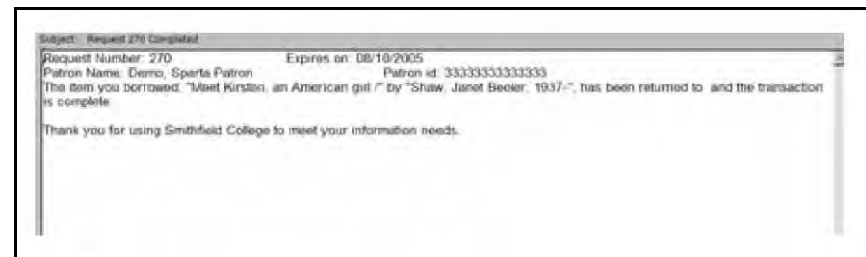
At any time, a library staff member can search for requests in URSA by clicking on the **Search Requests** button in the top right corner. The request can then be looked up by request number, match point (ISBN and other exact numeric matches), patron name or ID (barcode), author, title and journal title. For fields like author and title, keywords may be used to bring back any requests that contain the term.

It is also possible to find lists of requests matching certain criteria. This is useful in situations where a library may want to check shelves for all materials that have been marked "Returned" but have not yet been completed by the lending library, or to find items that have been filled by lenders but have not arrived in a timely manner.

Borrowing library staff can see full details of a request by double-clicking on a request. Lending library staff can see only the information that pertains to their own loan activity.



At many points in the workflow, URSA can send out email confirmations to the patron who requested the information (as seen below). Each library can profile which steps, if any, will trigger emails. It is also possible to print notices in URSA if a library mails notices to their patrons.



Canceling a Request

At times, you may need to cancel a request for a user. (For example, you may need to cancel a request because it was made on a reference item that was blocked by the availability rules and would not be supplied by the lending library.)

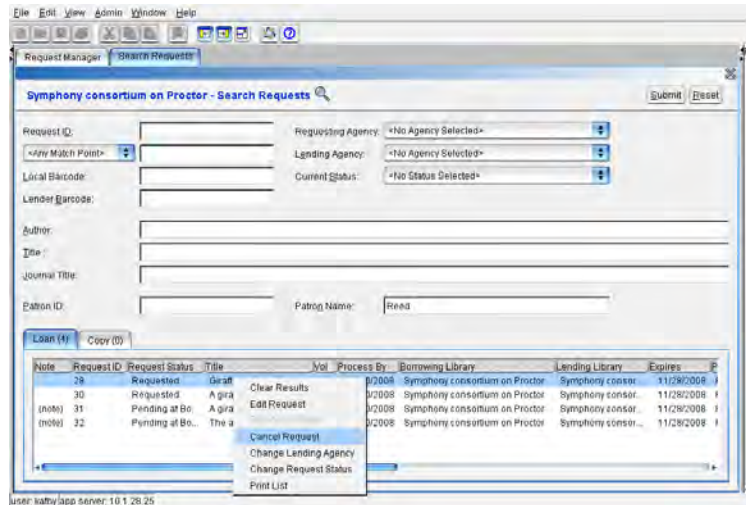


Cancel a request.

1. Click on the **Search Requests** option from the Launcher or from within the Request Manager.
2. Enter any information you have. For example you could enter the Requesting Agency, the Current Status and a word from the title:

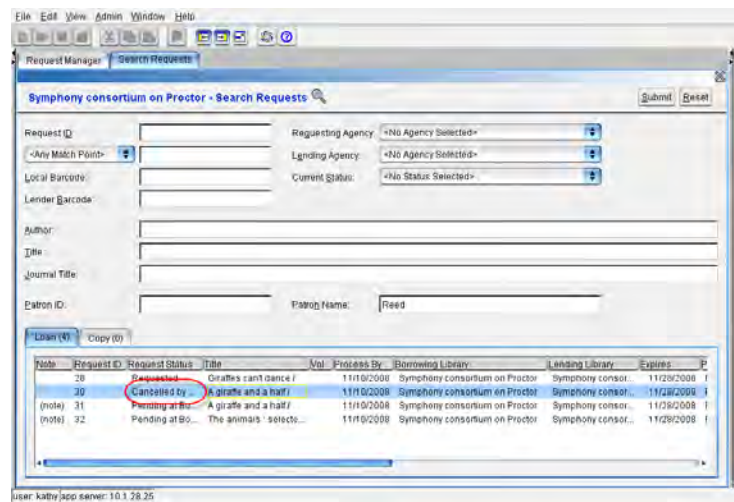
Note	Request ID	Request Status	Title	Vols	Process By	Borrowing Library	Lending Library	Expires	P
	20	Requested	Giraffes cant dance /		11/19/2008	Symphony consortium on Proctor	Symphony consor...	11/28/2008	f
	30	Requested	A giraffe and a hair?		11/19/2008	Symphony consortium on Proctor	Symphony consor...	11/28/2008	f
(note)	31	Pending at Bo...	A giraffe and a hair /		11/19/2008	Symphony consortium on Proctor	Symphony consor...	11/28/2008	f
(note)	32	Pending at Bo...	The animals : selecte...		11/19/2008	Symphony consortium on Proctor	Symphony consor...	11/28/2008	f

3. Highlight the title and right-click for the **Cancel Request** option:

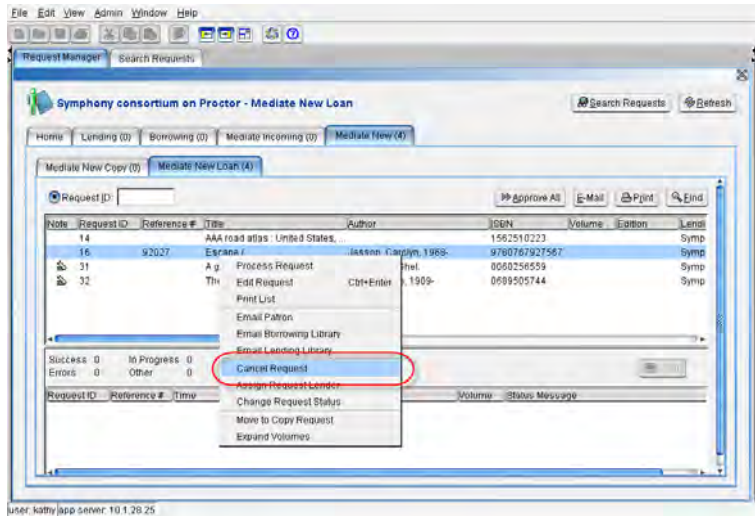


4. A pop up window will appear asking you to select an option. Choose Yes.

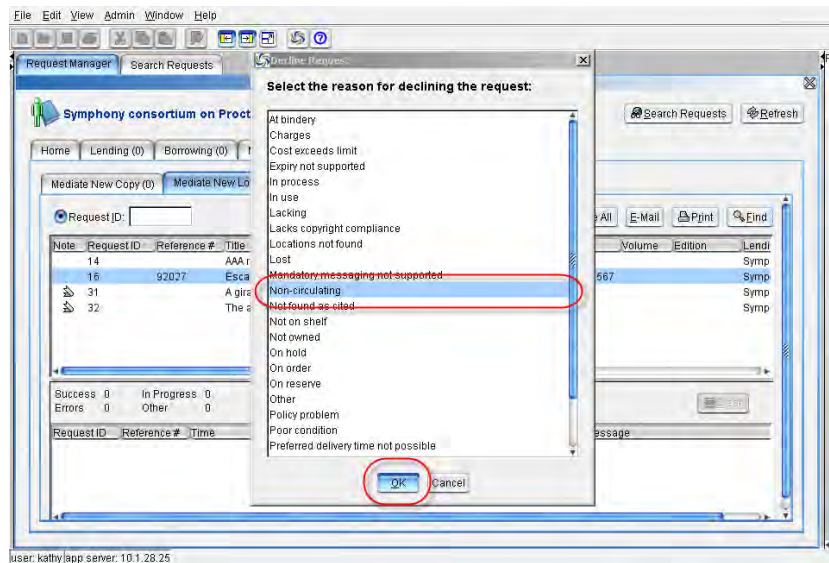
The request status will change to Cancelled by Borrowing Library.



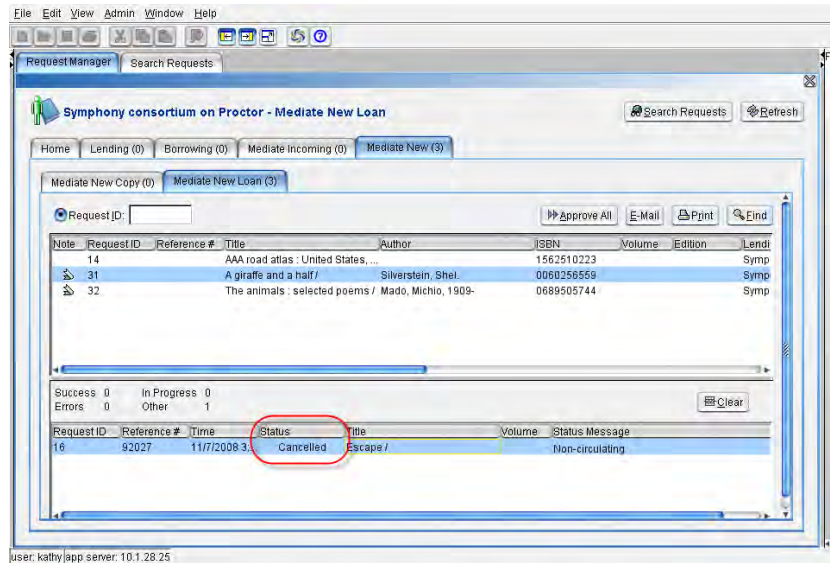
You may also cancel a request from within the Request Manager. Below the window is Mediate borrowing. The title has been highlighted and with a right-click, the choice of Cancel request appears.



The request has been canceled because it was lost and would not be supplied by the lending library. A Decline Request window pops up as shown below.



The request has now been processed and declined as shown below.



Your system may be set to automatically email the patron when the request is cancelled. Library staff can also email patrons from within Edit Request and it is possible to add text to the default when using this option.

Managing Unfillable Requests

This is the functionality for managing unfillable requests:

- If URSA cannot find the item at any of the lending libraries in the borrowing sequence, it either sends the request to the designated lender of last resort (LOLR) or notifies borrowing library staff that the request cannot be filled.
- Borrowing library staff can then use Edit Request to search manually for other lenders or inform the requester that the request cannot be filled. Email can be sent automatically when a request is cancelled by the borrowing library staff or they can use the email button in Edit Request to send a message with custom wording.
- If a different lending library is found that has different lending terms, the borrowing library needs to work with the requester to determine if the requester still wants the item.