

FROM ANACLAPE

**DALNET
MILE/URSA TRAINING**

- **MiLE Project: Shared ILL between libraries in DALNET, TLN, OWLS, and Suburban Library Cooperative**
- **Allows for patron or staff initiated ILL requests**
- **Patrons can access from Im@gine, there will be a link**
- **Patrons will need to login with their library bar code number**
- **If no library card, they can login as guest but will not be able to place a request**
- **Patrons will be authenticated via Remote Patron Authentication (RPA)**
- **Guest borrowers will need to go to library to place a request**
- **Single searching menu for public and staff**
- **All searching is via Z39.50 and is KEY WORD only**
- **Searching can be slow**
- **Be sure to select the kind of search and the catalog(s) to search**
- **Be patient**

STAFF ACTIVITIES

- **Searching is the same for staff and public**
- **Staff side is web-accessible**
- **Your DALNET Project Manager is most likely your Mile contact person**
- **Login Ids and passwords are locally assigned**
- **You may change your own password**
- **Access MiLE/URSA at**
http://www.mile.coop/~ursa/staff_login_frame.html
- **Note there is an underscore between staff and login and between login and frame**
- **Enter your login ID and password and click on the blue button**
- **DO NOT USE YOUR BROWSER'S BACK BUTTON**
- **ALWAYS USE THE MENUS AND BUTTONS ON URSA**
- **AFTER SEARCHING, THE SORT FUNCTION WORKS PAGE BY PAGE**
- **PATRONS CAN PLACE THEIR OWN REQUESTS**
- **STAFF CAN PLACE REQUESTS FOR PATRONS**
- **Any messages put into the message box on the patron's request will cause the request to be sent to the staff for review**
- **All items that can be lent are lent for 3 weeks, no renewals**
- **Policies are different for MiLE requests than for other ILL requests**
- **For now, URSA does not check out materials for patrons in Horizon, you must manually check out the items and check them back in**

- **Get in the habit of writing down request numbers—you will need them to complete your transactions**

 Help





 Feedback

 Quit

[Click here for the MiLE homepage](#)








Searching/Requesting

-  Search Virtual Catalog
-  Create Blank Monograph Request
-  Create Blank Serial Request
-  Request Inquiry




Miscellaneous

-  Administrative Functions

Lending

-  Review Incoming Requests
-  Set Not Available
-  Ship Loans
-  Ship Copies
-  Complete Loans

Borrowing

-  Receive Copies
-  Receive Loans
-  Return Loans
-  Provisional Requests

Order Requests By

- Location
- Call Number
- Need-By Date
- Request Type
- Borrow Library

Output Destination

- Browser
- Printer
- File
- E-Mail

Process Requests that have already been printed

-
- Print All Requests
 - Browse List of Requests to Print
 - Display Count of Requests

 Select to Print

 Select All to Print

<input checked="" type="checkbox"/> P Request#	Title	Borrowing Library	Call Number	Need By
<input type="checkbox"/> 919	<u>The friendship factor : how to get closer to the people you care for / Alan Loy McGinnis.</u>	WHTLAKE	BF 575 .L8 M26	04-17-02
<input type="checkbox"/> 920	<u>Dynamic people skills / Dexter Yager with Ron Ball.</u>	WHTLAKE	HM 132 .Y34 1997	04-17-02
<input type="checkbox"/> 934	<u>This business of music marketing and promotion / Tad Lathrop and Jim Pettigrew, Jr.</u>	MTC	ML 3790 .L37 1999	07-30-02
<input type="checkbox"/> 965	<u>We the people : a concise introduction to American politics / Thomas E. Patteron.</u>	LINCOLNPRK	JK 274 .P36 2000	04-18-02
<input type="checkbox"/> 1011	<u>Powernomics : economics and strategy after the Cold War / edited by Clyde V. Prestowitz, Jr., Ronald A. Morse, Alan Tonelson.</u>	ROMULUS	HC 106.8 .P68 1991	04-19-02
<input type="checkbox"/> 993	<u>Objects of concern : Canadian prisoners of war through the twentieth century / Jonathan F. Vance.</u>	TLN	JX 5141 .V36 1994	04-19-02
<input type="checkbox"/> 997	<u>Librarianship : a changing profession / edited by John R. Nemmers, Dixie L. Livers.</u>	WTRFORD	Z 665 .L524 1998	04-19-02
<input type="checkbox"/> 1001	<u>Biltmore Estate : the most distinguished private place / John M. Bryan.</u>	TLN	NA 7615 .B54 B79 1994	04-19-02

LENDING

- **Select review incoming requests**
- **Download request by selecting “Browse List of Requests to Print”**
- **Select records to print**
- **Select print from the menu bar of your browser**
- **When printing is complete, click on printed successful**

Pull the books from the shelf

- **Go back to Staff Menu and select SHIP LOANS**
- **Scan in the bar code number**
- **Type in the request number (IMPORTANT)**
- **Optional: type in lender notes**
- **Click Submit input button**
- **Check out the book in Horizon**
- **Put a purple wrapper on the book (MiLE is making these or you can download from the MiLE website and copy your own)**
- **Write the library code of library the book is being sent to on the wrapper**
- **Write in the Library Network Delivery Number of the institution the book is being sent to**
- **Write in the due date**
- **Write in the Request number**

The book comes back to you.....

- **Go to the Staff Menu and select Set to Complete**
- **Enter the REQUEST NUMBER**
- **Click “Submit Input”**
- **Discharge the book in Horizon**

IF THE BOOK IS NOT AVAILABLE TO BE LENT (FOR ANY REASON)

- **Go to the Staff Menu and click “Set Not Available”**
- **Go to “Requested Title” and look in the pull down menu**
- **Select book by title or “Input Request Number”**
- **Select the reason the item cannot be supplied**
- **Click “Submit Input”**

ADMINISTRATIVE FUNCTIONS

Asset Maintenance

Allows you to set staff user Ids and Passwords

Miscellaneous

Allows you to see borrowing and lending statistics for ILLs processed through MiLE.

BORROWING

REMEMBER: USE THE PROGRAM'S BUTTONS, NOT THE BUTTONS ON YOUR WEB BROWSER!!!!!!

- **Connect to the URL:**
http://www.mile.coop/~ursa/staff_login_frame.html
- **Remember that there are underscores between staff and login and login and frame**
- **Enter your staff ID and password**
- **Click on Staff Menu**
- **Click on “Search Virtual Catalog” (books only for now)**
- **Searching is by KEYWORD ONLY**
- **Select type of search and enter your search**
- **Results show locations and number of hits**
- **Result set can be sorted by author, title, or date**
- **Select the desired title**
- **Go to the Availability Screen**
- **If available, click “Request” button**
- **Request Summary will display**
 - **Request Number (computer generated, record this number for later use)**
 - **Patron ID (library card bar code)**
 - **Need by date**
- **Click on “Edit Patron” (patron information screen)**

Request: 1032 Max Cost:

Patron ID:EvansAnaclare Need By

Borrower Note:

Test request

Bibliographic Information

Lender String Information

Author:	Action	Order	Lender	Call No	Status	Union
Haege, Glenn.		1	SLC	698.14 H	PEN	
Title: Take the pain out of painting : interiors / Glenn Haege.		2	PDL	698.142 H	PEN	
Imprint: Royal Oak, Mich. : Master Handyman Press, 1994, c1992.		3	TLN	698.1 HAE	PEN	
Edition:		4	<input type="text"/>	<input type="text"/>		
ISBN: 1880615193						
LCCN:						
OCLC: 206385						

- Save Changes
- Edit Patron Information
- Edit Bibliographic Information
- Change Route Sequence
- Submit Request
- Cancel Request

Request: 1032
Requested Material: *Take the pain out of painting : interiors / Glenn Haege., Haege, Glenn.*

Patron ID:

Name:

Type:

E-mail:

Fax:

Pickup Location: ▼

Primary

Secondary

Phone:

Address:

 Save Changes

- **Enter the required fields: Patron ID, Name, email address, pick up location. Phone numbers and address info is optional)**
- **Click on Save changes**
- **Request Summary**
- **Click on “Submit Request”**

RECEIVING BOOKS

- **Each item received must also be received in MiLE/URSA**
- **From Staff Menu click on “Receive Loans”**
- **Enter the REQUEST NUMBER from the wrapper and the temporary barcode (can use that of the lending library)**
- **Click on “Submit Input”**
- **Take to designated location for patron pick up**
- **In Horizon, create a fast add for the title**
- **In Horizon, check the book out to the patron**
- **Loan period is 3 weeks, no renewals**

BOOKS RETURNED TO YOU

- **Discharge item in Horizon**
- **Go to MiLE/URSA, Login to Staff Menu**
- **Click on “Return Loan”**
- **Enter Request Number and click “submit input”**
- **Work in URSA and Horizon is done**
- **Change the MiLE wrapper routing code to the lender code and place in designated pick up location**

BORROWING (PATRON INITIATED REQUEST—STAFF MEDIATED)

- **Enter url: http://www.mile.coop/~ursa/staff_login_frame.html**
- **Remember the underscores**
- **Enter your staff ID and password**
- **Click on Staff Menu**
- **Click on Provisional Requests**
- **Click on the title of the desired request**
- **You will then be able to complete the request by supplying the same data as in staff initiated requests**
- **Edit the patron just as in the staff initiated request**






When items are received process as in staff initiated request

When items are ready to return they are processed in the same manner

NOTE: Provisional Requests are requests that either contain some type of note, or, are requests to borrow from a patron of your library.

Request Inquiry allows you to follow up on any request. Review incoming requests are requests being submitted to you. Most patron requests are sent out unmediated unless there is a note in the box or a required data element is omitted.

Requests stay in your box for a day and then move on to the next library. If your library is to be closed for any reason, your project

-  Provisional List
-  Staff Menu
-  Help
-  Feedback
-  Quit

Finalize bibliographic, patron, and lender string information before continuing.



Req	Need By	Requested Title	Requester
693	4/05/2002	<u>The great exotic fruit book : a handbook of tropical and subtropical fruits, with recipes / Norman Van Aken with John Harrison ; photography by Lois Ellen Frank.</u>	MARQUES C PATTY
696	4/05/2002	<u>Against the grain by J.K. Huysmans, with an introduction by Havelock Ellis; illustrated by Arthur Zaidenberg.</u>	DOUGLAS SLADEN CARD

Request: 693

Max Cost:

Patron ID:29343001609917 Need By

This patron has 1 requests active.

Patron Note: test

Borrower Note:

Bibliographic Information

Lender String Information

Author: Van Aken, Norman, 1951-

Title: The great exotic fruit book : a handbook of tropical and subtropical fruits, with recipes / Norman Van Aken with John Harrisson ; photography by Lois Ellen Frank.

Action	Order	Lender	Call No	Status	Union
	1	SLC	641.646 V	PEN	
	2	<input type="text"/>	<input type="text"/>		

Imprint: Berkeley, Calif. : Ten Speed Press, c1995.

Edition:

ISBN: 0898156882

LCCN: 94049370

OCLC: 31867506

- Save Changes
- Edit Patron Information
- Edit Bibliographic Information
- Change Route Sequence
- Submit Request
- Cancel Request

administrator can set your library to be temporarily unavailable to lend.

Your MiLE project manager will supply you with Problem Reporting Procedures, purple book wrappers, designate a pick up shelf for filled loans and provide you with library codes and the van pick up schedule.

HORIZON ISSUES

MiLE/URSA does not currently interface with Horizon. You will need to consider how to handle borrowed items in your Horizon system. You may wish to create a special itype and collection code for MiLE items as Wayne State did. You will need to decide if you are going to use the bar code on the book or use one of your own bar codes on a flag. With a special itype, you can write special circulation rules for MiLe materials and you can set the fast add records to disappear upon check in. For materials you are lending, you will need to consider if you are going to create a patron record for each patron, or for each library, or each consortium or a combination thereof.

Horizon will generate overdue notices for MiLE materials just as it does for our regular patrons. Patrons will be notified by URSA when requests can't be filled, when they have expired, and when the item is received.

Ae 3/02

TRAINING PLAN: URSA

1. What is URSA?

"Universal Resource Sharing Application" an independent software that uses Z39.50 to query up to 20 catalog installations at one time, and reports who owns what.

The user then has an option to request an item from any of the libraries without further librarian intervention and have it shipped to their home library.

2. What URSA is NOT

It is not an Interlibrary Loan system per se, but an advanced multi-library CIRCULATION system

- Patrons place their own requests based on their search. Staff may place requests also.

- URSA decides on which libraries to query and in what order.

- The lending library gets the request from URSA or from its built-in request system.

- The book is routed out on the circulation system; change status on URSA to shipped; and picked up by a delivery van.

- The borrowing library receives the book, changes status on URSA to received, checks out the book to its patron; a temporary record is added the circ system for the convenience of the borrowing library.

- When finished, the borrowing library completes the transaction on URSA (returned), checks it in on its own system, and the book is returned via the delivery van.

3. Libraries in control

- Each library system sets up parameters as to the rules of lending, although MiLE has created many standardized decisions about loan length, etc. But what gets loaned is a decision of the local library.

- Mention general rules

- Libraries can notify patrons via its own notice system, or URSA can send email updates directly to the patron.

4. Searching URSA

- URSA is a catalog search engine made up of individual libraries' catalogs. BUT it is only virtual--it only queries the libraries and sends back the data via the Z39.50 protocol. It is by nature only a KEYWORD catalog. There is no "title" authority search; it is actually a "keyword in title" search.

DEMO: LOGIN AS GUEST, DO SOME SAMPLE SEARCHES

5. Requesting Books - Unmediated

- "Unmediated" means only the patron deals with the requesting--library staff have minimal involvement. Though it seems like a frightening concept to give such power to patrons, academic and special librarians have found it works extremely well across a variety of library systems. Unmediated requests greatly reduce the work load and staff time.

- MiLE at present has designed URSA for book orders only, not periodical articles. This may be a future enhancement.

- Books represented in the Virtual catalog may not be available for lending (rare book items, new book shelf items, videos, library is closed, etc.) Individual libraries decide this for themselves.

-URSA creates a lending string when possible, and this is based on randomization, to keep any library from being asked too often for titles. URSA attempts to spread out the workload.

-Patron must have a library card at the library in question, and it has to be current. At the login process, the user is checked against the library's patron database. It is recommended that patrons with large fines or a hold on their record not be stopped at this time, but at the library circulation desk. This helps promote the paying of fines.

DEMO UNMEDIATED MODE

Search for an item, examine the results, place a request, view patron data, add/change some info.

Login as staff of lending library, retrieve the request, modify, ship.

6. Requesting Books - Mediated

- "Mediated" mode requires the intervention of the library staff at more steps in the process.

- Since URSA requires a telnet connection, for the time being Horizon customers must use the Mediated mode (Horizon does not have a telnet component for circulation.) Unfortunately, URSA cannot download records into the database until a later release.

- Any request that has a message or note attached becomes a mediated request whether the library is using unmediated or mediated mode. This means the library staff must view the message and then send it on or handle it internally.

- Libraries may wish to choose strictly "mediated" mode--but it may add work that is not necessary.

- Staff can use URSA like OCLC. Any paper or email request that comes into the library may be sent as a staff-initiated loan request rather than using OCLC or other systems.

DEMO UNMEDIATED MODE

Staff-initiated loan

7. Completing a loan

- In most cases, libraries will have checked out the item to the patron via their own online system. For unmediated loans, the temporary bibliographic record is added by URSA to the circ system, so the book's barcode will summon this record. When returning the book, it is necessary to check the book back IN, then mark it returned on URSA. This sets in motion the clearing of the temporary record in the system.

- The book is prepared on URSA by setting the status to "returned" and then physically returned via the regular van pickup.

- Lending library routes item back in and changes URSA status to complete.

8. Workflow

- Every library will have to set up its own workflow system. Books gathered for URSA or returned from URSA loans will need to have a physical location in the library set-aside for them until they are processed, or mass confusion may reign.

- Since URSA is primarily a circulation function, it is possible the circulation staff may be more involved than in standard ILL transactions. But each library will have to decide how to handle the transactions and arrange staff to consistently and meticulously keep to following procedures.