I. WHAT YOU NEED TO KNOW TO GET STARTED

**System and Equipment**

*Required:*
- Windows 95 or higher
- Microsoft Internet Explorer 5.0 or higher

*Recommended:*
- Laser printer for pull slips
- Code 39 barcode scanner

**Logging in to Loan SHARK**

Loan SHARK is accessed through the Internet. No software is required.

1. **Open Internet Explorer and type** [http://la.library.net](http://la.library.net) **in the Address field.**
   *Result:* You will see the Main Menu screen with three yellow boxes: ILL Librarian, Public Access Catalog and System Administrator.

2. **Click on the yellow ILL Librarian box.**
   *Result:* You will see the ILL Librarian login form.

3. **Type your Login Name and Password and select your library using the dropdown box. Click on the Go! button.**
   *Result:* You will see the Home screen.
   - There are two blue toolbars on the left side of the screen. The buttons on the toolbars are used to select interlibrary loan activities.
   - An information line appears at the top of the page. The line displays the User Name of the person currently logged in, followed by the name of the library.
   - The body of the screen contains explanatory text.

4. **If you do not have a Login Name and Password:**
   - Login as someone else from your library. Follow the directions in steps 5 through 7 for adding a new user to get a Login Name and Password for yourself.
   - If you do not know a Login Name and Password, call the State Library at either 225/342-4920 or 225/342-4918.

5. **Click on the blue Settings button on the Home toolbar on the left.**
   *Result:* You will see the Settings screen.

6. **Click on the blue Add User button on the Settings toolbar on the left.**
   *Result:* You will see the Add User form.
Fill in the required fields listed below for adding users. The others are optional.

- **First name**: Capitalize first letter only.
- **Last name**: Capitalize first letter only.
- **10 digit phone number**
- **Login Name**: Use a name that will be easy for you to remember.
- **Password**: Use a password that will be easy for you to remember.
- **Security Level**: Select ILL Librarian.
- **User Type**: There are three User Types in the dropdown box. Select NONE (-1): This is an administrator. Users with ILL Librarian security level should be assigned this User Type.

After entering data in the form, save by clicking the **Go!** button.

**Result:** You will receive a confirmation (or error) message.

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**Toolbars**

- Most Loan SHARK interlibrary loan screens have two toolbars on the left. The **System** toolbar with **Home** and **Logout** buttons beneath appears on all the Loan SHARK screens. **Home** brings you back to the Home screen from any screen in Loan SHARK. **Logout** brings you to the Main Menu page at [http://la.library.net](http://la.library.net).

  The lower toolbar changes from screen to screen. The buttons in the lower toolbar, which help you find information about interlibrary loan transactions, will be explained in more detail in other chapters.

- The lower **Home** toolbar allows you to select interlibrary loan activities.
  - **Home** brings you back to the Home screen from any other screen in Loan SHARK.
  - **Help** button is available on each page so you can access Library Request Help.
  - **Borrowing** takes you to all the Loan SHARK borrowing functions.
  - **Lending** takes you to all the Loan SHARK lending functions.
  - **Copyright Compliance** tracks copyright for your library.
  - **Settings** is used to add, update and delete users. Local libraries can also use Settings to override selected system-wide defaults.
  - The **PAC** button provides access to the Loan SHARK database of member libraries’ holdings. Clicking on the **PAC** button allows ILL Librarians to place requests. The **PAC** button is only accessible from the Home screen.

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**PAC (Public Access Catalog)**

The Loan SHARK PAC is a database of the catalog records and holdings of all automated Louisiana public libraries and the State Library of Louisiana. Louisiana libraries update their holdings for the PAC either monthly or quarterly. Once logged in as ILL Librarian, you can search the PAC and place requests for items found. The PAC is accessible on the Internet for searching, but requests can’t be placed without logging in as ILL Librarian.

Records in the PAC can be viewed as Label Display or MARC Display. A list of holdings follows the Label Display of the record. Holdings are not shown in the MARC Display. Some libraries have included branch holdings. Others have included only library
system holdings. The holdings record shows the holding library’s interlibrary loan
symbol, library system or library branch name, and local call number.

MARC records can be downloaded from the Loan SHARK PAC for cataloging.

**Transaction Lists**
When you click on one of the blue buttons below the Help button in the Borrowing
toolbar or below the Help button and above the Pull Slips button in the Lending toolbar,
you get an interlibrary loan transaction list. Each list contains the following:

- **List title**: The list includes a display title at the top, describing how the current
  list was obtained. For example, when you select the Pending button in
  Borrowing, the title is: “Pending” followed by information about the number of
  requests and which results page you are currently viewing, such as “1 to 10 of 33
  items.”

- **Lost Messages**: If the borrowing or lending library sends a Lost Message about a
  transaction, or if there is any response to a Lost Message by either partner, a
  notification is displayed in blue type at the top of all transaction lists. The purpose
  is to alert the library partner that some new activity has occurred.

- **Columns and actions**: The information below describes the list columns and
  some actions you can take from the list entries:
  - **Id**: The unique Identifier number assigned automatically to a transaction by
    the system is shown in the Id column. To access the history of the transaction,
    click the underlined Identifier number.
  - **Prec. (Precedence)**: A description of the material handling and breadth of
    searching appears in this column. The Precedence in Loan SHARK is always
    Normal.

  ![NEW](new_icon.png) This icon marks active transactions that have new activity, such
  as a Shipped response from the lender. These transactions have not been
  Marked as Read. The purpose of the **NEW** icon is to alert you to requests that
  have a new message or need to have some action taken.

  ![Scroll and Hand](scroll_hand_icon.png) Transactions that have notes from a borrower or lender are marked
  with a **Scroll and Hand** icon. To read the notes, click the underlined entry in
  the Latest Activity column.

  ![More Lenders](more_lenders_icon.png) The **More Lenders** icon (gray plus sign) appears in the Borrowing
  Not – Supplied transaction list beside requests that have lenders in the Lender
  String that have not been tried, but the automatic referral to lenders was
  stopped by the referral "pause" setup or by a Retry answer.
o **Latest Activity**: This indicates the very latest Message that has arrived at your library or has been sent by your library.

- **Status**: The Status column shows the current Status or state of the transaction. Those in red are completed transactions.

- **Date**: This column indicates the date of the latest activity.

- **Title**: The title of the item requested is shown in the Title column.

- **Partner**: A brief name of the borrowing library is shown in the Partner column. The Partner column appears only in Lending lists.

- **Tracking Number**: A column for the request Tracking Number is included in Borrowing transactions lists. The Tracking Number is a function of Patron Initiated ILL and is not used by Loan SHARK at this time.

- **Patron**: A Patron column appears in Borrowing transaction lists only. It includes the names of patrons who requested the loans.

- **Dropdown box (on the right side of each request line)**: The dropdown box contains a list of the next possible actions that you can take on this transaction. After selecting an action, click the Go! button. An entry form appears in which you can add information and confirm the action. Other activity buttons are available on the left toolbar on these pages, depending on the type of action selected.

- **Sorting transaction lists**: By default, most transaction lists are sorted by date. To re-sort a transaction list, click any of the highlighted/underlined column headers. To re-sort a column in the opposite order (descending or ascending order), click the column header again. A small up or down arrow appears to the right of the header to indicate the current sort order. Transaction lists of completed transactions and the Show All list are sorted descending by date (small arrow pointing down), so requests with the most recent Latest Activity appear first. Re-sort the list by clicking the Date column.

- **View Page Up or Page Down**: Click the Page Up and Page Down buttons to go to the next or previous pages in a long list. A label also appears at the top of each page displaying the current location in the list, for example, "1 to 10 of 32 items." A dropdown box beside the Page Up or Page Down buttons lets you select how many items you want to view at one time, ranging from 10 to 100 items.

- **History of a transaction**: Click on the underlined Id number beside a transaction line. This displays the Transaction Group History screen, showing all Messages and actions on this request from start through the current activity. You can also access the history by clicking the underlined entry under the Latest Activity column, and then clicking the History button available in the toolbar on the next page. Included on the History page is the Service Types column, showing every step in the transitions between library partners in chronological order. To view information about any step, click the underlined word(s) in the Service Type column. Note that the time is shown in Coordinated Universal Time (UTC), formerly known as Greenwich Mean Time (GMT).
- **View Lender String**: For any request, you can view the list of libraries in the borrower's Lender String (list of libraries to be tried). To do this, click the Id for the request of interest in any transaction list, or click the History button on other displays. On the Transaction Group History screen, select **Click Here to View the Lender String**. The libraries whose names have a line through them have not supplied the material and the request has moved on to the next library. The request is currently at the library whose name is in red.

- **Batch Processing**: If you select a transaction list containing items that all have the same Status, you may be able to handle all of the requests in the list through Batch Processing. Batch Processing will be explained in more detail in other chapters.

- **Refreshing displays**: If you perform an activity, such as Place Request, and then simply use the browser's Back button to view the previous transactions list, an outdated view will be displayed. To refresh the page, right-click anywhere in a list and select Refresh, or click an activity button in the left toolbar. Do not use the browser's refresh or reload button. After some activities, the confirmation page provides an easy way to return to a refreshed view of the transaction list. Click on the highlighted **Click here to return to the transaction list**.

### Pull Slips
Pull slips are printed for each request that comes to the lending library. The pull slip has all the information a library needs to take actions in Loan SHARK. Of particular interest to you:

- **Identifier**: The unique number assigned to each request by Loan SHARK. The Identifier number remains constant through all stages of the request.

- **Call number**: Your library’s call number prints out on the slip. The call number comes from the MARC record your library included in the PAC. Pull slips for Manual Requests do not have call numbers.

- **Bibliographic information**: Title, author, publisher, date, etc. help you identify the correct item.

- **Note**: All notes typed on the request when it is submitted by the borrowing library print out on the pull slip.

- **Addresses** of the borrowing and lending libraries to use on the shipping labels.

- **Barcodes** for lending and borrowing library to use for scanning when answering in Loan SHARK.

The blue button on the Lending toolbar that says **Pull Slips** (plural) prints all new, unprinted requests. You must be at the Transaction Group History screen or the Answer Information screen to print a pull slip for a single request. The blue button appearing on the toolbar will say **Pull Slip** (single).

### Expiration Timer
A request will Expire at the current lender if the request is not answered after two business days. The request will be sent automatically to the next lender in the Lender String, if any. Loan SHARK “business” days are Monday through Friday. Saturday and Sunday are “non-business” days. A library can select additional “non-business” days for its library. (See Chapter V, Setting Up Interlibrary Loan Transactions)
**Using Help**

A blue Help button that appears on any Loan SHARK page brings you to the Help file. Topics in Help are written for staff that manage day-to-day interlibrary loan transactions at their libraries. Use Help to find information on a topic more detailed than you find in the *Loan SHARK User Manual*. The Help file is written by The Library Corporation for Library•Request Interlibrary Loan software. It is not written specifically for Loan SHARK. Some of the sample screens are not the same ones you see in Loan SHARK. Some of the explanations do not apply to Loan SHARK.

1. Click on the blue Help button on the left toolbar from any screen. 
   *Result:* You will see the Help window. 
   *Hint:* Click the Maximize button at the top right of the screen to see a full view of the screen.

2. The Table of Contents in the left frame of the Help display is an expandable list of main topics. 
   - Click on the plus sign beside a Book icon to expand the list. 
   - Click on the question mark next to a topic to go to that topic. 
   - Click the Contents button in the Help toolbar across the top of the screen to return to the initial display of the contents.

3. Click the Index button in the Help toolbar on the top of the screen to search help topics by significant keywords. 
   *Result:* You will see a list of all the available keywords. 
   - If you don't see the words you want in the initial list, type a word and the list will narrow to show this word and nearby words and phrases. To select, click on the word or phrase of interest and press Enter on the keyboard, or double-click on the word or phrase. 
   - If the word is found in only one Help topic, that topic will appear immediately on the frame on the right. If the word is used in multiple topics, a Topics Found window appears listing the topic titles. Follow the instructions in the window to select the topic you want. 
   - Help topics often have more than one keyword. If you do not find the word you want at first, try typing another word of interest.

4. Click the Search button in the Help toolbar on the top of the screen to search Help by any word in any topic. Type any words, and click on the Search button. 
   *Result:* You will see a list of topics that contain the word(s).

5. Select from the list of topics by double-clicking a topic, or click on the topic title to highlight it, then press Enter on the keyboard. 
   *Result:* You will see the Help text. 
   *Note:* Help topics often contain colored, underlined words or phrases. Click on these to link to another topic of interest.

6. Use the Hand buttons at the bottom of the Help topic window to browse topics that are logically related by subject matter: Prev takes you back to a previous topic, and Next takes you to the next related topic.

7. Click the Home button on every help topic page to return to the introductory Help topic, “Welcome to Library•Request Help!”
Click the Back and Forward buttons in the Help toolbar at the top of the screen to see the previous topic you just viewed or go forward to the next topic.

More Help
A Loan SHARK page is available on the Home Page of the State Library of Louisiana at http://www.state.lib.la.us/Dept/UserServ/LS/index.htm. The page includes contact information for Louisiana public libraries and State Library of Louisiana interlibrary loan staff, a list of interlibrary loan symbols, Loan SHARK usage statistics by library, Loan SHARK PAC statistics, and other information.

State Library staff is available for assistance 8 a.m. to 4:30 p.m., Monday through Friday. You can contact:
Virginia Smith, 225/342-4920 or vsmith@pelican.state.lib.la.us
Donna D’Andrea, 225/342-4918 or ddandrea@pelican.state.lib.la.us

Statistics
Monthly Loan SHARK usage and PAC statistics for each library are posted on the Home Page of the State Library of Louisiana at: