

III. PLACING REQUESTS

Types of Searches

Every record in the PAC contains a number of searchable fields. The fields most commonly searched are the titles, authors, subjects, and notes fields. There are three search modes in the PAC: **SEARCH**, **BROWSE**, and **COMBINATION**.

SEARCH

- You can search four fields: titles, authors, subjects, and notes.
- You can select one field to search, or to select multiple fields.
- To select multiple fields, hold down the shift key and highlight with the mouse.
- You can select a search that “begins with” a word or phrase, or a search that “contains” a word or phrase.
- You can set limits by date, language, format, or location.

EXAMPLE :

Try this search:

- Highlight **titles** that **begin with** the words “sugar cane.”
- When you click on Search, you get a short list of results. All are publications that begin with the words “sugar cane.”

Now try this search:

- Highlight **titles** that **contain** the words “sugar cane.”
- When you click on Search, you get a much longer list of publications that have the words “sugar cane” somewhere in the title.

BROWSE

- You can choose from 17 fields to search.
- Only one field can be searched at a time.
- Searchable fields include titles, authors, subjects, notes, call numbers, LCCN, ISBN, ISSN, and others.
- Creates a list of results for your search and displays it, beginning with the terms you entered.
- You can browse the results list by moving up or down to find the record you are seeking.
- You may find multiple entries for one title.
- You may find a title in several different formats.
- You can set limits by date, language, format, and location.

COMBINATION

- You can search four fields: titles, authors, subjects, and notes.
- You can combine search terms using and, or and not (Boolean logic).
- You can do a keyword, or “contains” search.
- You can set limits by date, language, format, and location.

Help Screens

Each PAC screen has a **Help** button. Clicking on the **Help** button leads to a non-searchable document with a table of contents.

Searching the PAC

1.	Log in as ILL Librarian. <i>Result:</i> You will see the Home screen.
2.	Click on the blue PAC button on the Home toolbar on the left. <i>Result:</i> You will see the default PAC Search screen.
3.	If you want to use either the Browse or Combination search screen, select one by clicking on one of the yellow search buttons at the top of the screen. <i>Result:</i> You will see the search screen you selected.
4.	Select the fields you want to search, set any limits and chose the number of returns (hits) you want to see on the page. Type in the search word(s) you want to use and click the Search button. <i>Result:</i> You will see a list of hits or the message “Nothing was found for your search.”
5.	Click on the item in the list that matches what you are looking for. <i>Result:</i> You will either see another list of hits or see a screen with the full bibliographic record. If you see another list of hits, click again on an item in the list. You will see the full bibliographic record. Below the record is Location Information, a list of libraries that own the title. The location list is arranged alphabetically by library interlibrary loan code. Following the code is the library or branch name and then that library’s call number. If the library does not loan the item, “NOT FOR LOAN” will appear in place of the call number.
6.	Click on the browser BACK button at the top of the screen to return to the list of hits. Look at all the records that might fill your patron’s request. Select the record that is the correct format (large print, video, audio cassette, etc.). If there are several that meet your needs, select the one that has the most holdings attached. <i>Note:</i> Loan SHARK will not allow you to place a request on a record if your library is listed in the Location Information. If you are requesting the item because your copy is lost, you will have to either find another record for the item that does not have your library listed as owning it, or place a Manual Request for the item.

Placing a Request

1.	After you have selected the PAC record you want, click on the ILL Request button that is just above the Location Information. <i>Result:</i> The screen that appears will have a chart of the lending policies of the libraries that own the item followed by a Find Patron for PAC Request form.
2.	Type the first letter of the patron’s last name in the Last Name box in the Find Patron for PAC Request form. Click the Search button or press Enter on the keyboard. <i>Result:</i> You will see a list of Users.
3.	If the patron’s name is on the list, click on the name and go to step 6.

	<i>Result:</i> You will see the Place Interlibrary Loan Request form.
4.	If the patron is not on the list, scroll to the bottom of the list and click on Click here to add a new patron. <i>Result:</i> You will see the Add User for Pac Request form .
5.	<p>Fill in the required fields listed below. The others are optional.</p> <ul style="list-style-type: none"> • First name: Capitalize first letter only. • Last name: Capitalize first letter only. • Phone: Type 10 digits; use all zeros if there is no phone. • Login Name: <i>Suggestion:</i> Use the patron’s barcode number; or use the patron’s first name and last name as one word, all in lower case. • Password: <i>Suggestion:</i> Use the patron’s first name and last name as one word, all in lower case. • Security Level: Select ILL Librarian when adding a library staff member who will be using Loan SHARK for interlibrary loan; select Patron for all others. • User Type. There are three User Types in the dropdown box: <ul style="list-style-type: none"> o LIMITED (25) 25 active requests. Patrons in this User Type are allowed only 25 active requests in the system. Loan SHARK will automatically block the 26th request from being placed. o NONE (-1): This is an administrator. Users with ILL Librarian security level should be assigned this User Type. o PATRON (-1) Unlimited. Patrons in this User Type are allowed unlimited active requests in the system <p>Click on the Go! button at the bottom of the screen. <i>Result:</i> The Place Interlibrary Loan Request form appears with the name of the patron on the top. Bibliographic information for the item you are requesting appears in the form.</p>
6.	<p>The Interlibrary Loan Request form is divided into sections. Each section is discussed below.</p> <ul style="list-style-type: none"> • Item Details: Filled in for you by the system. • IPIC System Number: Not used in Loan SHARK. Do not complete. • ILL Service Types and Other Information: Use default settings for loans. If the request might be filled with copies, see step 7. If your patron has a deadline for receiving the item, select the Need Before Date from the dropdown boxes at the end of the Other Information section. • Note box: Use to add any information that might be helpful to the lending library or to you when you receive the item. The note prints out on the pull slip. For example, if you want only large print, say so. You might type your patron’s name, phone number and branch in the Note box. • Choose Your Lenders and Order of Preference: Should not be changed for requests that are found in the PAC. This is a list of lenders that own the item. The order of preference is set by the system.
7.	<p>If your patron wants a specific article from a journal and the request might be filled with a photocopy, you must fill in additional information:</p> <ul style="list-style-type: none"> • The date of the publication, the article title and pagination in the Item

	<p>Details section.</p> <ul style="list-style-type: none"> • The Maximum Lending Fee box in the Other Information section. The recommended amount is \$5.00. Change the If a fee applies, do you agree to pay it? box answer to yes. If your patron wants copies but will NOT pay, you should put that in the Note box.
8.	<p>Click the Submit Request button just below the Note box and above the Choose Your Lenders and Order of Preference section.</p> <p><i>Result:</i> A confirmation screen appears saying “The request service was successfully placed!” The screen also gives a Tracking Number. The Tracking Number is for Patron Initiated Interlibrary Loan and is not currently used in Loan SHARK.</p> <p><i>Note:</i> If you do not get the confirmation screen, you clicked the Close Window button at the bottom of the Request Form instead of the Submit Request button. The request is not lost. It will be found in the In Review list (see Chapter IV, Borrowing Activities).</p>
9.	<p>Click the Close Window button at the bottom of the confirmation screen to return to the PAC.</p> <p><i>Result:</i> You will see the Search screen.</p>
10.	<p>To place another request, click on the yellow Search, Browse or Combination buttons at the top of the Search screen. Follow the steps above.</p> <p><i>Note:</i> At the screen with the Find Patron For Pac Request form, you will have the option of placing another request for the previous patron or using the form to place a request for another patron. It will save you steps if you group all requests for one patron together.</p>

Manual Requests

It is appropriate to send a Manual Request:

- When the item can't be found in the PAC.
- When the PAC location list shows your library owning the item. You want to borrow it because your copy is lost and Loan SHARK won't let you place a request from the PAC. Make a note of the other libraries that own the title. When placing the Manual Request, uncheck all the libraries, then recheck those that own the item. Also check the State Library as OCLC Agent so that the item can be borrowed through OCLC if no other library will lend.

If you didn't find the item in the PAC, probably no member library owns it. You want the request to go to the State Library as OCLC Agent so it can be borrowed through OCLC. You do not want it to go to all the libraries on the list. It is a waste of time for the other libraries to look for and answer a request for an item they don't own and it slows down the request.

1.	<p>At the Home screen, click on the blue Borrowing button in the Home toolbar on the left.</p> <p><i>Result:</i> You will see the Borrowing screen.</p>
2.	<p>Click on the blue Manual Request button in the Borrowing toolbar on the left.</p> <p><i>Result:</i> You will see the Find Patron For Manual Request form.</p>
3.	<p>Type the first letter of the patron's last name in the Last Name box and click Search or press Enter on your keyboard. If the patron is on the list, click on the patron's</p>

	<p>name.</p> <p><i>Result:</i> The Place Interlibrary Loan Request for (patron’s name) screen appears. Proceed to step 5, below.</p>
4.	<p>If the patron’s name isn’t on the list, click on Click here to add a new patron and follow the procedure for adding a new user in step 5 in the Placing a Request section above. Click on the Go! button at the bottom of the form.</p> <p><i>Result:</i> You will see the Place Interlibrary Loan Request for (patron’s name) screen.</p>
5.	<p>Fill in as much information as you can in the Item Details section of the form. If you are requesting a journal article, be sure to at least put in the name of the journal, the publication date, the title of the article and pagination.</p> <ul style="list-style-type: none"> • IPIC System Number: Not used in Loan SHARK. Do not complete. • ILL Service Types and Other Information: Use default settings for loans. If the request might be filled with copies, fill in the Maximum Lending Fee box under Other Information stating the amount your patron is willing to pay for copies. \$5.00 is the recommended amount. Change the If a fee applies, do you agree to pay it? box answer to yes. If your patron wants copies but will NOT pay, you should put that in the Note box. • If your patron has a deadline for receiving the item, select the Need Before Date from the dropdown boxes at the end of the Other Information section. • Note box: Use to add any information that might be helpful to the lending library or to you when you receive the item. The note prints out on the pull slip. For example, if you want only large print, say so. You might type your patron’s name, phone number and branch. • Choose Your Lenders and Order of Preference has a button that says Uncheck All and a list of all Loan SHARK libraries, beginning with the State Library and ending with State Library as OCLC Agent. Click the Uncheck All button to clear the checks by each library name. Then, recheck all the libraries that you want the request to go to. In most cases, you will check only State Library and State Library as OCLC Agent.
6.	<p>Click the Submit Request button just below the Note box and above the Choose Your Lenders and Order of Preference section.</p> <p><i>Result:</i> A confirmation screen appears saying “The request service was successfully placed!” The screen also gives a tracking number. The tracking number is for Patron Initiated Interlibrary Loan and is not currently used in Loan SHARK.</p> <p><i>Note:</i> If you do not get the confirmation screen, you clicked the Close Window button at the bottom of the Request Form instead of the Submit Request button. The request is not lost. It will be found in the In Review list (see Chapter IV, Borrowing Activities).</p>

Canceling a Request

You can stop (cancel) a request before it is shipped by a lending library. Once a lending library answers Ship to the request, the Cancel option is not available.

1.	<p>At the Home screen, click the blue Borrow button on the Home toolbar on the left.</p> <p><i>Result:</i> You will see the Borrowing screen.</p>
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2.	Search for the request you want to cancel one of three ways: from the Pending transaction list, Search by Title, or Search by User.
3.	To answer from the Pending transaction list, click on the blue Pending button on the Borrowing toolbar on the left. <i>Result:</i> You will see the Pending transaction list, arranged by date, with the oldest request first and the most recent last.
4.	Each line represents an interlibrary loan request. Find the request you want to cancel, then click on the arrow beside the dropdown box. Highlight the Cancel answer you want and click Go! <i>Result:</i> You will see Cancel screen.
5.	Click the Send Cancel button at the bottom of the screen. <i>Result:</i> You will see a confirmation page.
6.	To Search by Title, click on the blue Search button on the Borrowing toolbar on the left. <i>Result:</i> You will see the Find ILL Transaction(s) form.
7.	In the Find field, type in the title. When searching by title, the punctuation and spelling must be exactly the same as in the request. Sometimes it is best to type in the first few words of the title and select from the resulting list. Click the Search key at the bottom of the form. <i>Result:</i> You will see a transaction list with one or more items.
8.	Find the transaction you want to cancel and follow the directions in steps 4 and 5.
9.	To Search by User, click on the blue Search by User button on the Borrowing toolbar on the left. <i>Result:</i> You will see the Find Patron for Transaction Search screen.
10.	In the Last Name field, type the first letter of the patron's last name. <i>Result:</i> You will see a list of patrons.
11.	Click on the name of the patron you are looking for. <i>Result:</i> You will see the Find ILL Transaction(s) form with the patron's name at the top.
12.	Click the Search button at the bottom of the form. <i>Result:</i> You will see a transaction screen with all the requests for that patron listed.
13.	Find the transaction you want to cancel and follow the directions in steps 4 and 5.

Subject Requests

If your patron wants information on a topic rather than a specific title, you can send a Subject Request to the State Library. The State Library Reference librarians will select items from the State Library collection to supply the information your patron wants. Loan SHARK provides a Subject Request template to email the request to the State Library. Statistics are kept for the number of Subject Requests sent by each library but Subject Requests are not tracked in the system. If you want all interlibrary loan materials coming to your library to be tracked in Loan SHARK, ask that a list of titles be sent so that you can submit author/title requests for the patron.

1.	<p>At the Borrowing screen, click on the blue Subject Request button in the Borrowing toolbar on the left.</p> <p><i>Result:</i> You will see the Subject Request form. The From, To and Subject fields are already filled in.</p>
2.	<p>Fill in the Subject Request:</p> <ul style="list-style-type: none"> • In the Message box, fully describe the Subject your patron is researching. Give as much detail as possible to assist the Reference librarians in selecting material to send. If the information is for a school paper, say so. • List the sources you have already consulted so that the State Library will not send what you have already used. • If your patron has a deadline, fill in the Date needed by line. • Fill in the patron's name and general age level (grade school, college, adult, etc.). • The last line of the template states "Patron will pay a \$5.00 maximum charge for photocopies." In some instances, there might be a charge for copies. Your patron will get the information faster if the State Library knows from the start that the patron will pay. If the patron won't pay, say so. <p>Check what you have written to be sure that it is complete and clear. Click the Send Request button.</p> <p><i>Result:</i> In the next day or so, you will receive a response "Reference will send or advise" from the State Library. The request will go to a Reference librarian to fill. Research time depends on the complexity and difficulty of the question.</p> <p><i>Note:</i> If you send an author/title request on the Subject Request form, the State Library will email you back telling you to resubmit the request by either searching the PAC or on the Manual Request form. Usually, the State Library will provide you with additional bibliographic information to help you search the PAC or send a Manual Request.</p>