

VI. GLOSSARY OF TERMS

Term	Explanation
Batch Processing	All requests on a status transaction list (such as Cancel – Pending) can be answered at once if the same action is being taken on all. "Use Defaults and Batch Process All Transactions" with a dropdown box showing available actions appears as the last line on each page. Batch Processing applies to that page only, not the entire list of a multi-page transaction list.
Calendar	Loan SHARK includes two types of calendars: the System Calendar and an individual Library Calendar. The System Calendar applies to all libraries in Loan SHARK and determines which days are considered to be "business" days (open days) and "non-business" days (closed days) for the entire consortium. The System Administrator configures the System Calendar. Individual libraries can use the Library Calendar to set their own closed days that do not apply to the system as a whole. Closings on the System Calendar cannot be overridden by any Library Calendar.
Cancel Cancel Pending	Borrower libraries can cancel a request that is still active. When the library selects the action Cancel, the status of the request changes to Cancel – Pending. When the lending library responds by answering Cancelled, the request is completed (terminated).
Check In	When interlibrary loan items have been received back by the lender from the borrower library, the lending library answers Check In in Loan SHARK and the request is completed. No further action is needed. The lending library can still send a Message back to the borrower library if necessary.
Conditional	Lending libraries have the option of answering Conditional to requests. The Conditional Message states that the request will only be filled if the borrower agrees to meet conditions specified by the lender. If the borrowing library does not respond to the potential lending library within 14 days, an Expired Message is sent to the borrowing library. Then, the request moves on to the next library in the Lender String. Loan SHARK libraries are asked not to use this answer to borrowing libraries.
Configuration	The way that Loan SHARK is set up, or organized, is called Configuration.
Copyright Compliance Search	The Home toolbar includes Copyright Compliance button. The Copyright Compliance search feature monitors the number of photocopies a library receives according to Copyright Compliance Guidelines and Copyright Compliance Law.
Delete Transaction	The Delete Transaction button appears on the left toolbar on the Transaction Group History screen for completed transaction. Only the System Administrator can delete a transaction. ILL Librarians will get the Message "Unable to delete the transaction group: You are not

	permitted to perform this action. It requires a higher security level.”
Expired	<p>Requests Expire in three different situations:</p> <ul style="list-style-type: none"> • Lending libraries have two business days to respond to a new request. A request Expires at the current lender if no action is taken on the request during that time. The request is sent automatically to the next library in the Lender String. • Borrowing libraries have 14 days to respond to a Conditional response to a request by the potential lending library. If a response is not given, the borrowing library receives an Expired Message and the request moves on to the next library in the Lender String. • If a request is not filled by the “need before date” on the request, the request Expires and terminates.
Flags	Flags is a column heading on the Transaction Group History screen. Flags includes Read, Unread and Current. Read indicates that the Message was Marked as Read and the action was reviewed. Unread indicates that the action has not been reviewed. Current indicates the latest action taken by the logged in partner. It is not necessarily the latest action taken on the request.
Help	The Help file provides explanations and instructions for Library•Request software that runs Loan SHARK. The information is provided by The Library Corporation and is written for their software. It is not specific to Loan SHARK. Help topics can be accessed by clicking the Help button on any page. The topics in the help file are directed to library staff who manage their library’s day-to-day interlibrary loan transactions. Help for searching the Public Access Catalog (PAC) can be found in the separate PAC Help, accessible on any PAC page.
Hold	A lending library can answer Hold Placed on requests for items that are in circulation. A reserve is placed in the lending library’s circulation system. When the item is available to send, the lender answers Ship in Loan SHARK and sends the item to the borrowing library. The Hold Placed answer should be used only if the lending library is at the end of the Lender String.
Id (Identifier)	The Identifier is the unique number assigned automatically to each request by the system. The number is used to locate the transaction and is consistent through all steps in the transaction for both the lender and borrower. Id is the heading on the Identifier number column on transaction list screens.
ILL Librarian	The person at each public library who is responsible for interlibrary loan activities is identified as ILL Librarian in Loan SHARK.
In Process	Requests that have been received from a borrowing library and are being processed by the lender but have not been shipped have the status In Process for the lending library. In Process includes requests that are unprinted and requests that have had the pull slips printed.

In Process – Printed	Requests that have been received by the lender and have had the pull slips printed have the status In Process – Printed for the lending library. They are being processed by the lender but have not been shipped. Their latest activity is Will Supply, Hold Placed, or Message.
In Process – Unprinted	Requests that have been received by the lending library but have not had pull slips printed and have not been answered by the lender have the status In Process – Unprinted for the lending library. Their latest activity is ILL Request.
In Review	Requests receive the In Review status when they have been incompletely placed by the borrowing library. They need to be reviewed, placed, or denied by the borrowing library.
In Review – New Patrons	The In Review – New Patrons button on the Borrowing toolbar is for use in Patron Initiated ILL. It is not used by Loan SHARK at this time.
Item Type	Item Type is a field in the PAC and Manual Request forms and prints out on the pull slip. The default is Monograph. Other choices in the dropdown box on the request forms are Serial and Other.
Latest Activity	The Latest Activity is the last Message that has arrived at a library or has just been sent by a library. A column headed Latest Activity appears on all transaction list screens.
Lender String	The Lender String is the list of libraries that are sent a request. The Lender String for requests placed from the PAC include all libraries that own a circulating copy of the item. The State Library as OCLC Agent is always the last library on the list. If the request is not filled by any of the preceding libraries, the State Library will either fill or request the item through OCLC. The Lender String for Manual Requests is selected by the borrowing library. The arrangement of the Lender String is set by the system and should not be changed by individual libraries.
Lost	Interlibrary loan items that have been declared lost by the borrowing library have the status Lost.
Manual Request	See Request, Manual.
Mark As Read	The red NEW icon indicates active transactions that have new activity. Clicking on the Latest Activity for a request brings up an information screen. A blue Mark as Red button appears on the Lending toolbar at the screen. Clicking on the Mark As Read button removes the red NEW icon beside a transaction in the transaction list.
Maximum Lending Fee	Some libraries charge for photocopying. If a patron's request might be filled with photocopies, borrowing libraries must state the maximum fee the patron is willing to pay on the PAC Request form, the Manual Request form and the Subject Request form. The suggested maximum fee is \$5.00 for most requests.

Message	At any step in a transaction, the borrowing and lending libraries have the option of sending a free text note to the partner. The partner is alerted to a Message by a NEW icon next to the request in a transaction list.
More Lenders	Loan SHARK is configured to “pause” after 15 lenders have responded Unfilled or Expired to a request. If there are additional lenders in the Lender String that have not been tried, a More Lenders (gray plus sign) icon appears beside the transaction in the borrowers Not Supplied transaction list. The borrowing library has the option of sending the request on to the remaining lenders.
NEW	The red NEW icon on transaction lists marks active transactions that have new activity, such as a Shipped response from the lending library. The transaction has not been Marked as Read. The purpose of the New icon is to alert the ILL Librarian to requests that have a new Message or need to have some action taken.
Not Received/Overdue	Items with this Borrowing status have been shipped by the lender, but the borrower has not answered Receive. The Loan SHARK due date has passed and the system has sent the lender an Overdue notification. The Not Received/Overdue button on the Borrowing toolbar brings up the Not Received/Overdue transaction list from which the borrowing library can take appropriate action.
Not Supplied	Requests have the Not Supplied status for borrowing libraries when all potential lenders have responded with an answer of Unfilled, Retry or the transaction Expired. Requests have the Not Supplied status for lending libraries once the lender has answered Unfilled, Retry or the transaction has Expired at that library.
Originator	The term is found as a column heading on the Transaction Group History screen. The Originator is the partner that took the action that appears in the Service Type column.
Overdue	Requests that have not been returned to the lender before the Loan SHARK due date are declared Overdue by the system. The Overdue status in Loan SHARK has nothing to do with the status of the item in the lending library’s circulation system.
PAC	The Loan SHARK public access catalog (PAC) is a database of the catalog records and holdings of all automated Louisiana public libraries and the State Library of Louisiana.
Partner	The Partner is the other library involved in an ILL transaction. A brief form of the borrowing library’s name appears in the lending library’s transaction lists in the Partner column. The lending library’s name appears in the Partner field in the borrowing library’s Transaction Group History screens. The borrowing library’s name appears in the Partner field in the lending library’s Transaction Group History screens.
Patron Cancelled	Patron Cancelled is a function of Patron Initiated ILL and is not used by Loan SHARK at this time.

Patron Denied	The Patron Denied button on the Borrowing toolbar brings up a transaction list of requests with the status Patron Denied. This is a function of Patron Initiated ILL and is not used by Loan SHARK at this time.
Patron Initiated ILL	Library•Request, the software used for Loan SHARK, has a feature allowing Patrons to submit interlibrary loan requests in the PAC. The feature is not being used by Loan SHARK at this time.
Patron Message	Patron Message is a choice in the dropdown action box on all Borrowing transaction lists. Patron Message is a function of Patron Initiated ILL and is not used by Loan SHARK at this time.
Pending	Requests that have been sent to a possible lender and the items are expected from the lending library have the status of Pending for the borrowing library. The Latest Activity on these items is Will Supply or Hold Placed.
Pull Slips	Pull slips are printed to assist in tracking the interlibrary loan transaction. The lending library's staff can use the pull slip to find the item on the shelves. The pull slip travels with the item so that staff can quickly access transaction information and take further action.
Read Unread	The Transaction Group History screen for a request details each Message or activity that has been taken. Each Message is flagged Read or Unread. Read indicates that the Message or action was Marked as Read and the action was reviewed. Unread indicates that the Message or action has not been reviewed.
Recall	Lending libraries can ask a borrowing library to return a borrowed item before the due date. The status is changed to Recall.
Receive	The borrowing library answers Receive in Loan SHARK when the requested item arrives from the lending library.
Received Copies	Received copies are non-returnable photocopies that have been received from the lender. The Received Copies button on the Borrowing toolbar brings up a list of all transactions with the Received status that are non-returnable. For non-returnable items, the Received status is a completed status, and no further action is required from the borrower.
Received Loans	Received Loans are requests of loanable items that have been received from the lender. The Received Loan button on the Lending toolbar brings up a list of all transactions that must be returned by the borrower.
Renew/Overdue	Clicking on the Renew/Overdue button on the Borrowing toolbar brings up a transaction list of Overdue items for which the borrower has requested renewals, but to which the lender hasn't responded. Clicking on the Renew/Overdue button on the Lending toolbar brings up a transaction list of Overdue items for which the borrower has requested renewals. The lender needs to respond to the requests for renewal.
Renew/Pending	Clicking on the Renew/Pending button on the Borrowing toolbar brings up a transaction list of items for which the borrower has

	requested renewals, but to which the lender hasn't responded. Clicking on the Renew/Pending button on the Lending toolbar brings up a transaction list of items for which the borrower has requested renewals. The lender needs to respond to the requests for renewal.
Repeat	If Repeat appears in the left toolbar with one or more buttons under it, those actions can be repeated. Only actions that changed the transaction status and have not had answering Messages can be repeated.
Request, Manual	The borrowing library can initiate a Manual Request when a title isn't located in the PAC. A Manual Request might also be used when the item is in the PAC with a holding for the borrowing library whose copy of the item is lost.
Request, Subject	Requests sent to the State Library for information on a topic or subject rather than for a specific title are sent on a Subject Request form. The State Library Reference librarians select items from the State Library collection to supply the requested information. Loan SHARK provides a Subject Request template to email the request. Statistics are kept for the number of Subject Requests sent by each library, but Subject Requests are not tracked in the system.
Retry	The lending library has the option of a Retry answer on a request with the status In Process. The Retry answer stops the request from going to the next library on the Lender String. Lending libraries should use the Retry answer only when they determine that the borrowing library sent a Manual Request to all the libraries by mistake. The borrowing library has the option of retrying a request from the Transaction Group History screen. Clicking on "Retry this Request with (name) Parish" will resend the original request to that library but not the remaining Lender String.
Return	Return is the action taken in Loan SHARK by a borrowing library when a received item is sent back to the lender.
Returned	Interlibrary loan items that have been shipped back to the lender have the status Returned.
Return Pending	Return Pending transactions have been answered Return by the borrowing library. Lending libraries can view the transactions by clicking on the Return Pending button on the Lending toolbar. The list provides a way see all of the items that should arrive soon from borrowers to Check In.
Search	The Search button is available on both the Borrowing and Lending toolbars. The ILL Librarian can search all transactions by title, author, call number, control number, ISBN, ISSN, and Identifier. Searches can be limited to a selected library, all libraries, and a selected state, or status. Results can be sorted a number of ways. Actions can be taken from the resulting transaction list.
Search by User	ILL Librarians can find all requests for existing ILL patrons by using the Search by User button on the Borrowing toolbar. Transaction searches for a selected patron can be limited by ILL Partner and state,

	or status. Results can be sorted a number of ways. Actions can be taken from the resulting transaction list.
Scan	Every pull slip has two Code 39 barcodes printed on the bottom. The barcodes can be scanned for quicker answering. Both the Borrowing and Lending toolbars have Scan Mode buttons. The Scan Mode toolbar contains buttons for all possible actions that can be taken in Scan Mode.
Service Type	This term is found as a column heading on the Transaction Group History screen. The Service Types are ILL Request, ILL Answer and Message. Clicking on a highlighted entry in the Service Types column will lead to a detailed Answer Information screen.
Ship	Ship is the action taken in Loan SHARK by a lending library when a requested item is sent to the borrowing library. The lending library is not able to answer Ship after the Unfilled answer has been given.
Shipped	Requests for which the items have been sent to the borrowing library have the status Shipped.
Shipped Copies	Lenders answer Ship Copies when sending non-returnable interlibrary loan items such as photocopies in response to a request. The Shipped Copies button on the lending toolbar brings up a list of all transactions with the Shipped Status that are non-returnable. For non-returnable items, the Shipped Status is a completed Status. No further action is required from the lender.
Shipped Loan	Shipped Loans are requests for loanable items that have been shipped to the borrower. The Shipped Loan button on the lending toolbar brings up a list of all transactions that must be returned by the borrower. For the lender, the Status remains Shipped until the item is returned to the lender and it is Checked In.
Show Active	The Show Active button on both the Borrowing and Lending toolbars brings up a transaction list of all requests either placed or received by a library that have not been completed or terminated.
Show All	The Show All button on both the Borrowing and Lending toolbars brings up a transaction list of all active and completed requests placed by a library.
Status	The current Status or state of a request is based on the combination of the borrower and lender responses to the transaction.
State Library as OCLC Agent	The last lender on the Loan SHARK Lender String is State Library as OCLC Agent. If no library can fill a request, the transaction defaults to State Library as OCLC Agent. For most libraries, the request is placed in OCLC and the borrowing library receives the answer Will Supply with a note Trying to Borrow. If the borrowing library does their own OCLC, the answer will be Unfilled.

Status/Error Report and Status Query	At any step in a transaction, the borrowing and lending libraries have the option of sending a Status Query Message to the partner. The system responds by automatically sending a report about the current transaction. Either partner library can also send a Status Report at any time, even if no Status Query has been received. The Status Report form includes a free text box for a detailed note. Error reports can also be generated by the system. Once this action has been taken, Status can't be changed, no further action can be taken.
Subject Request	See Request, Subject.
System Administrator	The System Administrator is the staff at the State Library of Louisiana responsible for maintaining information on participating libraries, setting overall borrowing and lending parameters, and monitoring ILL performance throughout the system. Currently, the System Administrator is Virginia R. Smith, Coordinator of User Services. 225/342-4920 or ysmith@pelican.state.lib.la.us
Toolbar	The toolbar is a group of buttons that help navigation in Loan SHARK, help find information about interlibrary loan transactions and help taking action on transactions. Most screens have two toolbars on the left. The System toolbar is available on all screens. The buttons in the lower toolbar change from screen to screen.
Tracking Number	The Tracking Number is a function of Patron Initiated ILL and is not used by Loan SHARK at this time.
Transaction Group History	The Transaction Group History for a request can be found by clicking on the Id (Identifier) number in any transaction list or clicking on the History button in some toolbars. The Transaction Group History shows all Messages and actions on a request from the start through the current activity.
Transaction List	Clicking on most toolbar buttons brings up a list of all the transactions with a particular status for a library. The Transaction List provides information about each request. Further action can be taken from the list. Clicking on any column heading resorts the list by the contents of that column. Clicking again on the same heading resorts the list in reverse order.
Transaction Qualifier	Transaction Qualifiers are shown on Transaction Group History screens and refer to Messages between two partners.
Unfilled	When a lending library cannot supply a requested item, the Unfilled answer is given.
Unread	See Read.
Will Supply	When a lending library batch prints pull slips, an automatic "Will Supply – Being processed for supply" Message is sent to the borrowing library. This answer means the lender is processing the request and plans to send another response later. The Message disables the expiration timer to give the lender time to process the request and determine whether or not the library can fill it. For the borrowing library, the status of each of these requests becomes Pending and the Latest Activity is ILL Answer – Will Supply.

