



Setting Up Call Slip: Configuration and Workflow

Hi and welcome to this lesson on Setting Up Call Slip.

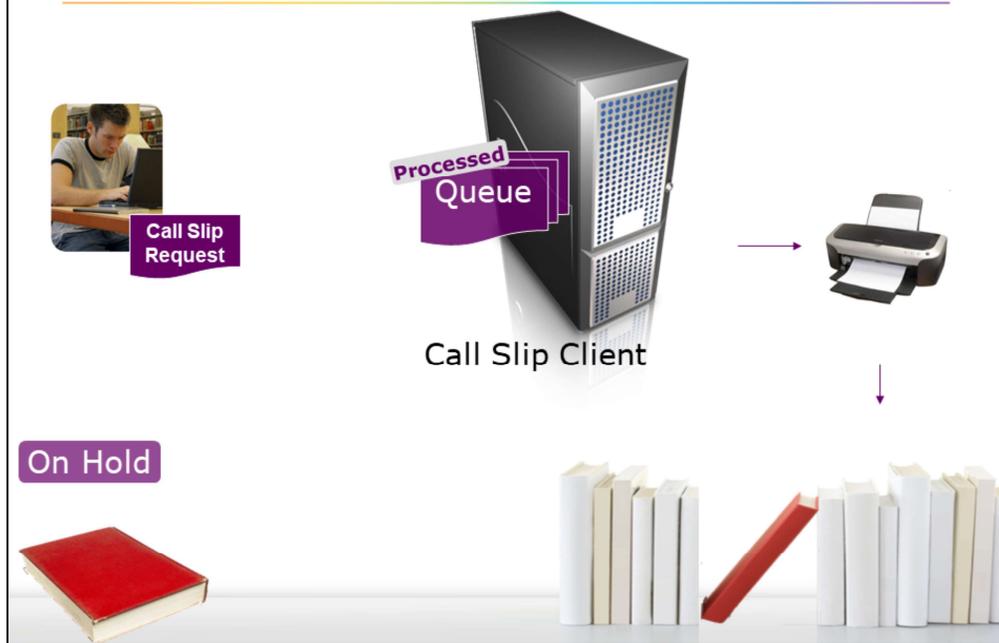
Topics

- Pre-configuration
- Configuration
 - SysAdmin > Call Slip
 - SysAdmin > OPAC
 - SysAdmin > Circulation
 - Call Slip client
- Request and Process Workflow

<record> In this lesson you will become familiar with the call slip configuration and workflow.

- We will first determine pre-configuration decisions that need to be made before implementing Call Slip, and introduce call slip queues.
- Then, we will go through the 4 general areas in which call slip is configured
- And finally, we will walk through the workflow of placing a request, and processing it.

What is a Call Slip Request?



a Call Slip Request is a form filled out by a library patron to request a particular item.

When a Voyager **Call Slip Request** is made, through Web Voyahge, the request goes into a queue. Library staff can then print off the requests, and fetch the items from the shelf to place on the hold shelf.

Once the item is processed in Call Slip, the item will be placed On Hold for the patron.

let us discuss how to set up these different pieces!

Part 1: Pre-configuration

What decisions will I need to make before implementing Call Slip?



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Part 1: Pre-configuration

<another voice>

How you choose to configure your Call Slip functionality, depends on the work-flows you want to use at your institution, and what kinds of items you would like to have available, for which kinds of patrons.

Here are some things to consider before enabling the functionality.

Part 1: Pre-configuration



Before you can use Call Slip, there are a few things to identify.

- Which storage or shelving locations have items that may be requested? you will need to know this to configure SisAd-min properly.
- <click> and, from which PC or PCs should requests for items be displayed and printed? This may depend on how your library is laid out, or if your library has multiple branches.

NOTE: The PCs can literally be anywhere in your library.

Simply pick the PC or PCs that make the most sense for your library

Call Slip Queue

- Request destination
- The printing location for your library's Call Slips
- Where the staff receives requests to pull items from the shelves



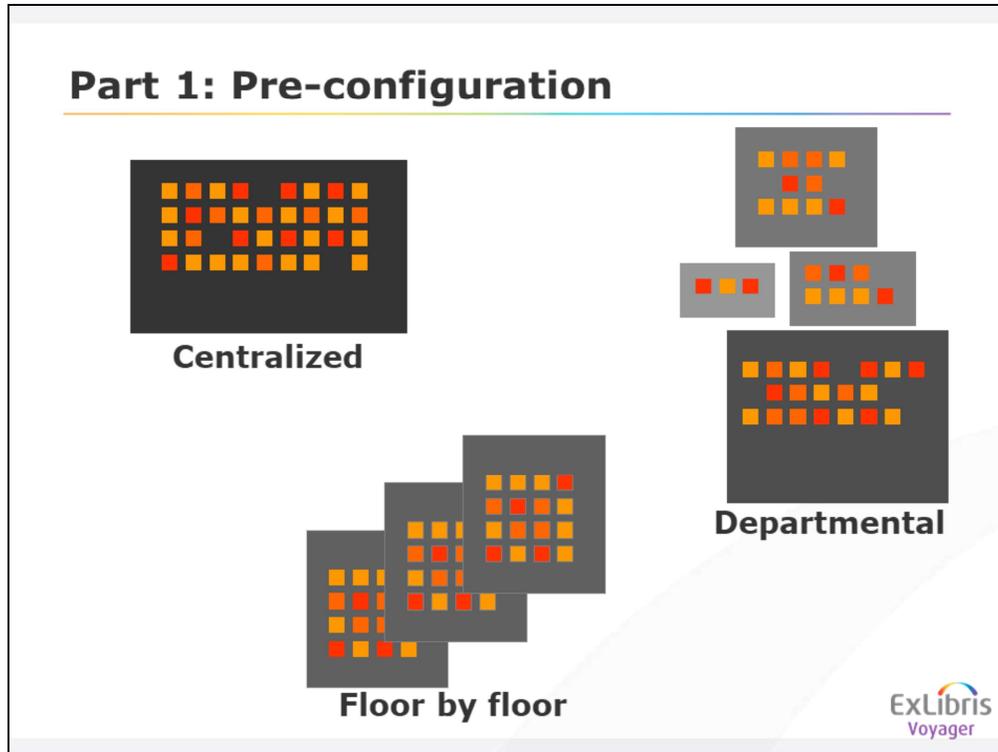
Call Slips - Queues		
Default	Codes	Name
	Branch	Branch 1
	Internat	International Locations
*	Main	Main Building
	Remote	Remote Storage Facility

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A request destination is called a Call Slip Queue. It is the printing location for your library's Call Slips. This is where library staff will receive notices to pull items from the shelves. You need to decide which of these will become Call Slip Queues for your site.

Whatever makes sense, for your library.

Part 1: Pre-configuration



- If your library is completely **centralized**, then one PC can receive all requests for your library.
- If you have **departmental libraries** that circulate their own items, you may need one PC near each departments Circulation Happening location.
- Perhaps you should have one PC receiving requests **on each floor** of your library, or one PC receiving requests **in every building** that contains items.

Part 2: Configuration

What set up do I need to do in the clients in order to enable Call Slip?



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<another voice>
<end>

There are a number of different areas, in the SisAd-min and Call Slip clients that we will need to look at, in order to enable this functionality.

Call Slip Configuration Components

1. SysAdmin / Call Slip:
 - Call Slip Queues
 - Call Slip Rules
 - No Fill Reasons
2. SysAdmin / OPAC:
 - Request Forms
 - Misc
 - Call Slip Request Messages
3. SysAdmin / Circulation:
 - Policy Definition Locations
 - Policy Definition Intervals
 - Policy Definition Patron Groups
 - Policy Matrix
 - Misc
4. Configure Call Slip client:
 - Modify the Call Slip config file
 - Modify the Call Slip Preferences

You can
download this
list from here

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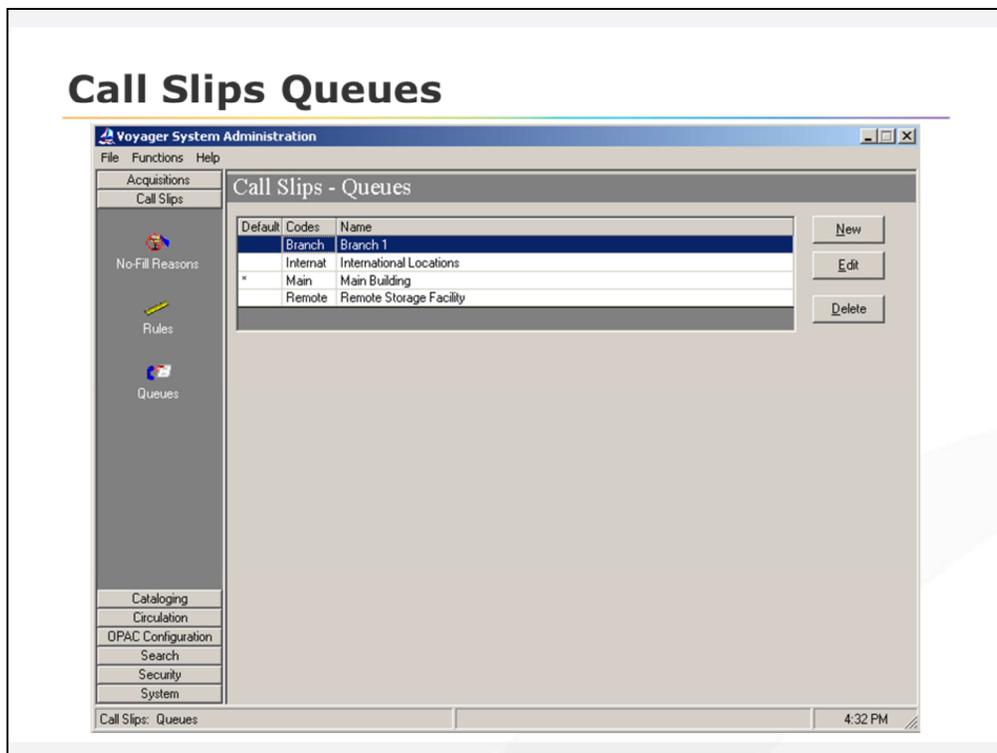
There are 4 general areas we will need to edit to complete configuration – to start, here is a brief checklist. we will visit each of these areas in depth in a moment.

1. SysAdmin / Call Slip:
 - Call Slip Queues
 - Call Slip Rules
 - No Fill Reasons
2. SysAdmin / OPAC:
 - Request Forms
 - Misc
 - Call Slip Request Messages
3. SysAdmin / Circulation:
 - Policy Definition Locations
 - Policy Definition Intervals
 - Policy Definition Patron Groups
 - Policy Matrix
 - Misc

4. Configure Call Slip client:

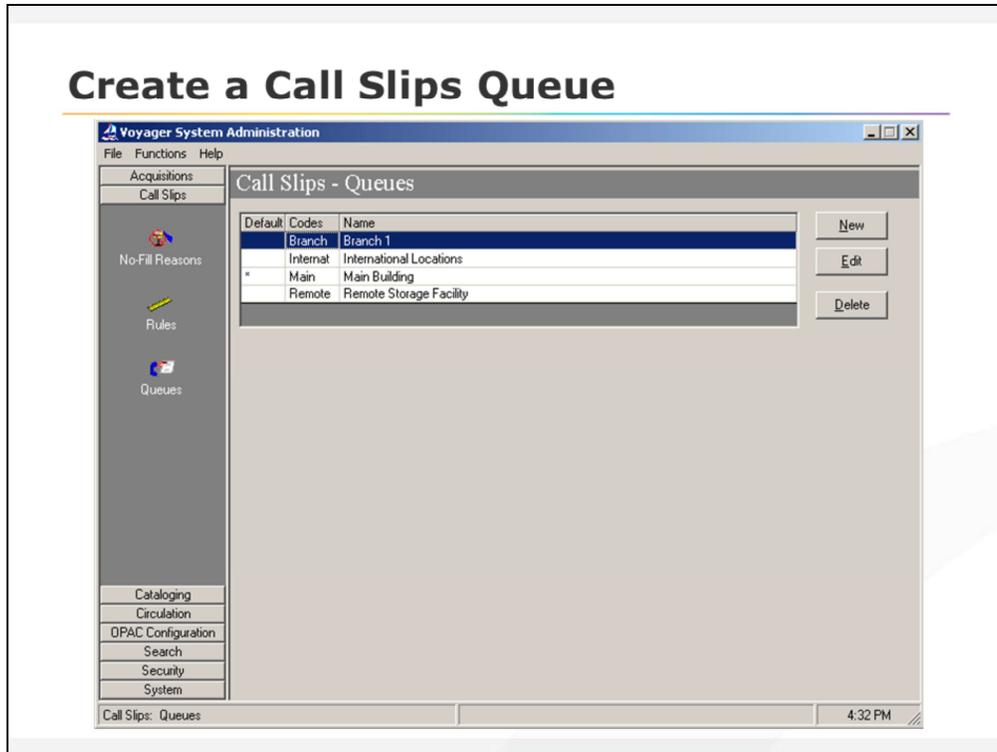
- Modify the Call Slip config file
- Modify the Call Slip Preferences

Call Slips Queues



let us start in the SisAd-min clients Call Slips>Queues section.

Create a Call Slips Queue



The first step you will need to take is to create a Call Slip Queue (that is the request destination we mentioned earlier).

This should correspond to the PCs where you want operators to view or process Call Slip requests that have been placed.

<annotate>Now, Let us look at the Values tab.

Call Slips Queues Values

The screenshot shows the 'Call Slips - Queues' window. At the top, there is a table with columns 'Default', 'Codes', and 'Name'. The table contains four rows: 'Branch' (Branch 1), 'Internat' (International Locations), 'Main' (Main Building), and 'Remote' (Remote Storage Facility). The 'Main' row is selected. To the right of the table are 'New', 'Edit', and 'Delete' buttons. Below the table is an 'Edit Queue:' section with 'Group' and 'Values' dropdown menus. A 'Processing Code' dialog box is overlaid on the 'Values' dropdown, containing three radio button options: 'Autocharge to requesting patron', 'Place "On Hold" shelf', and '"In Transit For Hold" to dest. location'. The third option is selected. To the right of the dialog box, there are several dropdown menus, including one set to 'days' and another set to 'Days'. At the bottom of the main window are 'Save' and 'Cancel' buttons.

For each Queue, you must set the Values. This determines what happens to the request once it is filled – let us go over each section in a bit more detail.

Processing Code section: <annotate>

here is where you determine what new status the item will have once the request is processed.

Once the library staff has verified that the item can be processed and has retrieved it in order to get the item to the patron, the items status must be changed because the item is no longer **available**.

Call Slip Queues Processing Code determines what the items new status will be when that item request is filled.

<click and annotate>

- Autocharge to requesting patron:** Upon processing request, item is automatically charged to patron.
- Place “On Hold” shelf:** Upon processing request, item has status of On

Hold.

•**“In Transit for Hold” to destination location:** Upon processing, status changes to In Transit On Hold (operator still must discharge item at pickup location to set status to On Hold).

On the bottom part of the Call Slips Queues window we see the **Expiry and archive periods** <annotate>.

These values are important in determining how long a request remains pending, and how long the patron can view details about the request in Web Voyahge.

•<click> Expire Period: is the number of days before an unprocessed or unfilled call slip gets a status of Expired; if the number is 0, it will never expire.

•<click> Archive Period: is the number of days before non-active call slip gets archived. Once a request is archived, it will no longer show in the patron information display in Web Voyahge.

Circjob 8 must be running daily for these parameters to take effect.

Call Slips Queues Values

The screenshot shows the 'Call Slips - Queues' interface. At the top, there is a table with columns 'Default', 'Codes', and 'Name'. The table contains four rows: 'Branch' (Branch 1), 'Internat' (International Locations), 'Main' (Main Building), and 'Remote' (Remote Storage Facility). The 'Main' row is selected. To the right of the table are buttons for 'New', 'Edit', and 'Delete'. Below the table is an 'Edit Queue:' section with a 'Group' dropdown set to 'Values'. Under 'Processing Code', there are four radio button options: 'Autocharge to requesting patron', 'Place "On Hold" shelf', '"In Transit for Hold" to destination', and 'Include patron info in call slip display' (which is checked). To the right of these options are two checkboxes: 'Set circulation review status on new item' and 'Set cataloging review status on new item'. A call slip preview is overlaid on the bottom left, showing the following information:

Request Id/Date:	4 - 10/30/2009 04:16 PM
Call Number:	BF385 .S36 2007
Barcode:	14580643
Title:	30 days to a more powerful memory /
Author:	Scott, Gini Graham.
Located at:	Main
Patron Info:	BISTER - Julie Bister

This flag determines whether patron information will be displayed on the screen in Call Slip:

This flag does NOT determine whether or not patron information shows up on a **printed** Call Slip.

Call Slips Queues Values

Call Slips - Queues

Default	Codes	Name
	Branch	Branch 1
	Internat	International Locations
*	Main	Main Building
	Remote	Remote Storage Facility

Buttons: New, Edit, Delete

Options:

- Set circulation review status on new item
- Set cataloging review status on new item
- Include patron info in call slip display

Location: **Circulation Desk**

Location: Circulation Desk

Default Item Type: book

Archive Period: 5 Days

Expire period: 5 Days

Buttons: Save, Cancel

The Location section determines where the requested item should be delivered after processing:

If you will be creating items in Call Slip and want those items to be marked as Circ Review and or Cat Review, check these boxes.

Call Slips Rules

The screenshot displays the Voyager System Administration interface. The main window is titled "Call Slips - Rules" and contains a table with the following columns: Print Group Name, Location Name, Call # Min, Call # Max, Yr Min, and Yr Max. The table lists several entries, including "Main Building" for "Biology", "Music Stacks", and "International Collection", and "Remote Storage Facility" for "Offsite". The "Yr Min" and "Yr Max" columns show values "1920" and "1999" for the "International Collection" entry. To the right of the table are buttons for "New", "Edit", "Delete", and "Set Rules".

Print Group Name	Location Name	Call # Min	Call # Max	Yr Min	Yr Max
Main Building	Biology				
Main Building	Music Stacks				
Main Building	International Collection			1920	1999
Main Building	GovDocs				
Remote Storage Facility	Offsite				
Branch 1	Branch 2				

Now we will move on to the Rules section of the SisAd-min Call Slip definitions.

Call Slips Rules



- Determine the item's shelving location
- Step through the Call Slip Rules until a rule that matches the item's criteria
- Place the request in the matching Call Slip Request Destination, i.e., the correct Voyager Call Slip Queue

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When a request is made, <click> Voyager determines:

- <click> Is this patron eligible to place requests?
- <click> Can this item be requested by this patron?

If the answer to all above questions is **Yes** <annotate>, then Voyager will:

- <click> Determine the items shelving location.
- <click> Step through the Call Slip Rules until Voyager identifies a rule that matches the items criteria,
- <click> And place the request in the matching Call Slip Request Destination, i.e., the correct Voyager Call Slip Queue.

Call Slips Rules

The screenshot shows the 'Voyager System Administration' interface. The main window is titled 'Call Slips - Rules'. On the left is a sidebar menu with options: Acquisitions, Call Slips, No-Fill Reasons, Rules, Queues, Cataloging, Circulation, OPAC Configuration, Search, Security, and System. The main area contains a table with the following data:

Print Group Name	Location Name	Call # Min	Call # Max	Yr Min	Yr Max
Main Building	Biology				
Main Building	Music Stacks				
Main Building	International Collection				
Main Building	GovDocs			1920	1999
Remote Storage Facility	Offsite				
Branch 1	Branch 2				

Buttons for 'New', 'Edit', 'Delete', and 'Set Rules' are located to the right of the table. The status bar at the bottom left reads 'Call Slips: Rules' and the bottom right shows the time '4:37 PM'.

This is where we will start associating an items location with the Call Slip Queue that will receive requests for items from that location.

Would You Like to See an Example?

Departmental
Library Example



Centralized
Library Example



Skip

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Departmental Library Rules Example

Call Slips - Rules						
Print Group Name	Location Name	Call # Min	Call # Max	Yr Min	Yr Max	
Campus 1	Campus 1 Main					New
Campus 1	Campus 1 Periodicals					Edit
Campus 2	Campus 2 Periodicals					Delete
Campus 2	Campus 2 Main					Set Rules

- **Item requested from Campus 2 Periodicals?**
Find Call Slip Queue that matches this location (Campus 2)
- **No rule for items location?**
Request goes to library's default Call Slip Queue specified in SA>Call Slip>Queues



Lets look at an example for a departmental library:

If an item is requested from Campus 2 Periodicals, Voyager will look down the **Location** column until it finds the shelving location for Campus 2 Periodicals. The correct Call Slip Queue (in the column Print Group Name) for this request is **Campus 2**.

If none of the rules tells Voyager where to display requests, the request will go to the library's default Call Slip Queue.

Centralized Library Rule Example

Call Slips - Rules						
Print Group Name	Location Name	Call # Min	Call # Max	Yr Min	Yr Max	
Call Slip Desk						<input type="button" value="New"/>
						<input type="button" value="Edit"/>
						<input type="button" value="Delete"/>
						<input type="button" value="Set Rules"/>

Library has only one Call Slip Queue?

Only need one Call Slip Rule – all requests will go there!



Now lets look at an example for a centralized library:

For libraries with one Call Slip Queue, you need to have just one Call Slip Rule with only the Queue selected (in the Rules screen it is called the Print Group Name). Every item that is Call Slipped will go into this default queue.

No-Fill Reasons

- Library can't always fill every request
- Need to let patron know why request not filled
- Define any system specific reasons library can't supply the item

Call Slips - No-Fill Reasons

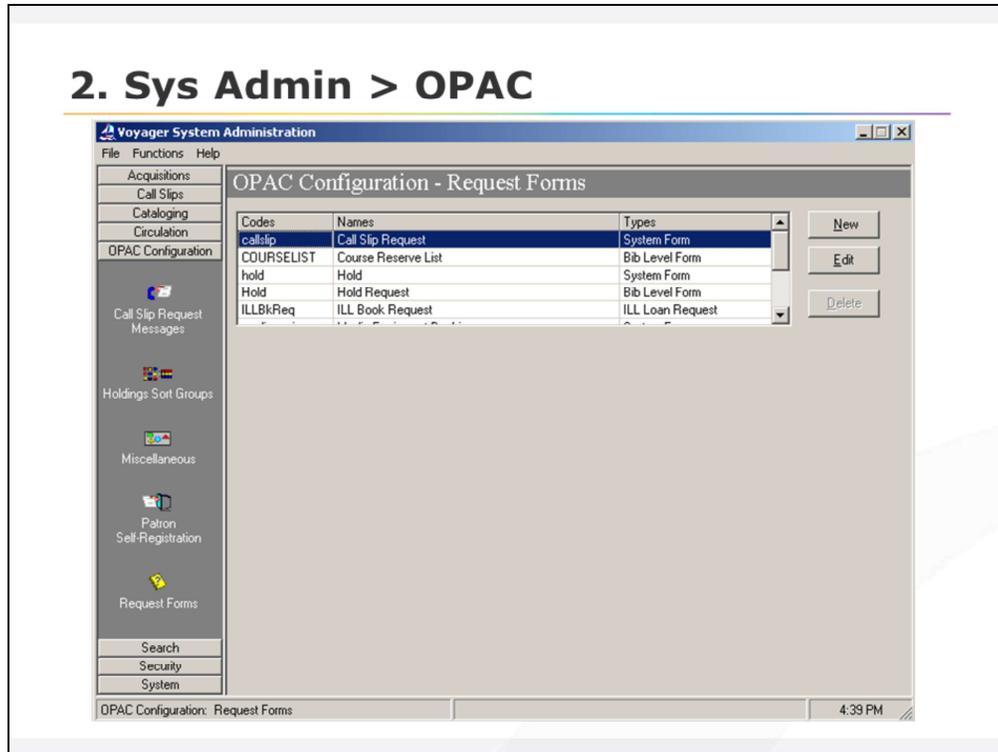
Suppress	Codes	Description
<input checked="" type="checkbox"/>	DM	Damaged
<input type="checkbox"/>	NF	Not Found
<input type="checkbox"/>	OL	On Load to Another Patron

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If the request cannot be filled, library staff need to identify the reason when no-filling the request.

Your library creates appropriate no-fill reasons in System Administration.

2. Sys Admin > OPAC



A number of other configuration settings live within the OPAC Configuration section of SisAd-min. If you want your patrons to be able to place a Call Slip through Web Voyahge, they will have to go through a few steps to access the form. we will go through how this looks, and then talk about how to define the form they will see.

2. Sys Admin > OPAC

- Patrons search OPAC, bring up record
- Select Make A Request option to access Call Slip options

Beautiful swimmers : watermen, crabs, and the Chesapeake Bay /

Title: Beautiful swimmers : watermen, crabs, and the Chesapeake Bay / by William W. Warner ; drawings by Consuelo Hanks.
Author: [Warner, William W.](#)
Publisher: Boston : Little, Brown, c1976.
ISBN: 0316923265
Description: 1st ed.
Format: Book
Subjects: [Crab fisheries--Chesapeake Bay \(Md. and Va.\)](#)
[Blue crabs.](#)
[Chesapeake Bay \(Md. and Va.\)](#)
Held at: [Local Database](#)

This item

- [Record View](#)
- [Staff View](#)

Actions

- [Make a Request](#)
(e.g. Hold, Recall, Photocopy)
- [Print](#)
- [Export](#)
- [Add to My List](#)

More About This Item From



A patron will search Web Voyage, and then select a particular title to view the individual record. From the record display, they will be able to select the Make a Request option in order to log in and access the different request forms.

Request Forms

Here is the login form:

Log In

Please enter your Patron Barcode and Last Name, then click the **Log in** button.

Log in using my

Id:

Last Name:

Patron Requests

Select the type of request you would like to make. See the help screen for details about different kinds of requests.

- [Hold Request](#)
- [Recall](#)
- [Call Slip Request](#) (9996 available)
- [Short Loan](#)
- [Blank Form](#)
- [Course Reserve List](#)
- [ILL Book Request](#)

Once you've logged in, you will see the various request options.

here is an example of the login form, and the Patron Requests screen that displays once you have logged in. You can see the call slip request option displayed, along with a count of how many call slip requests the patron can make before being blocked.

Request Forms

There are two fields that need to be set for the Call Slip form:

- Form Name
- Instructions

The screenshot shows the 'OPAC Configuration - Request Forms' dialog box. At the top, there is a table with three columns: Codes, Names, and Types. The 'callslip' form is selected. Below the table is the 'Edit Request Form' section, which has two tabs: 'Select Form' and 'Fields'. The 'Fields' tab is active, showing the following fields:

Codes	Names	Types
callslip	Call Slip Request	System Form
COURSELIST	Course Reserve List	Bib Level Form
hold	Hold	System Form
Hold	Hold Request	Bib Level Form
ILLbkReq	ILL Book Request	ILL Loan Request

Edit Request Form:

Select Form | Fields |

Form Type: System Form

Form Code: callslip

Form Name: Call Slip Request

E-mail:

OPAC Suppress

Instructions: Please select an item.

Request Output:
 Send Request by E-mail Output Request to a Flat-File

Save Cancel

Two fields you will want to set on the Call Slip form are Form Name and Instructions. Because this is a System Level form, the code and type are already chosen for you, and are not editable.

Request Forms

SysAdmin Form Name =
form's display name in
WebVoyage

- [Call Slip Request](#) (9996 available)

Call Slip Request

Instructions: Please select an item.

This Copy: c.0 61955 Main

Comment:

Barcode

Submit Cancel

SysAdmin Instructions = instructional text on
WebVoyage Call Slip Request form

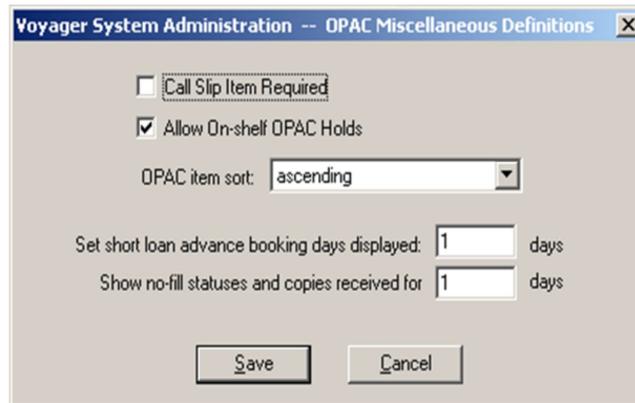
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The Form Name you set in SisAd-min is the display name for the call slip form in Web Voyage. Only Patron Groups enabled to place Call Slips will see this option.

The Instructions you set in SisAd-min become the instructional text that appears on the Call Slip Request form in Web Voyage.

Miscellaneous

Check **Call Slip Item Required** if you want patrons to be able to place Call Slip requests only if there is an item attached to the bib you are requesting.



The screenshot shows a dialog box titled "Voyager System Administration -- OPAC Miscellaneous Definitions". It contains the following settings:

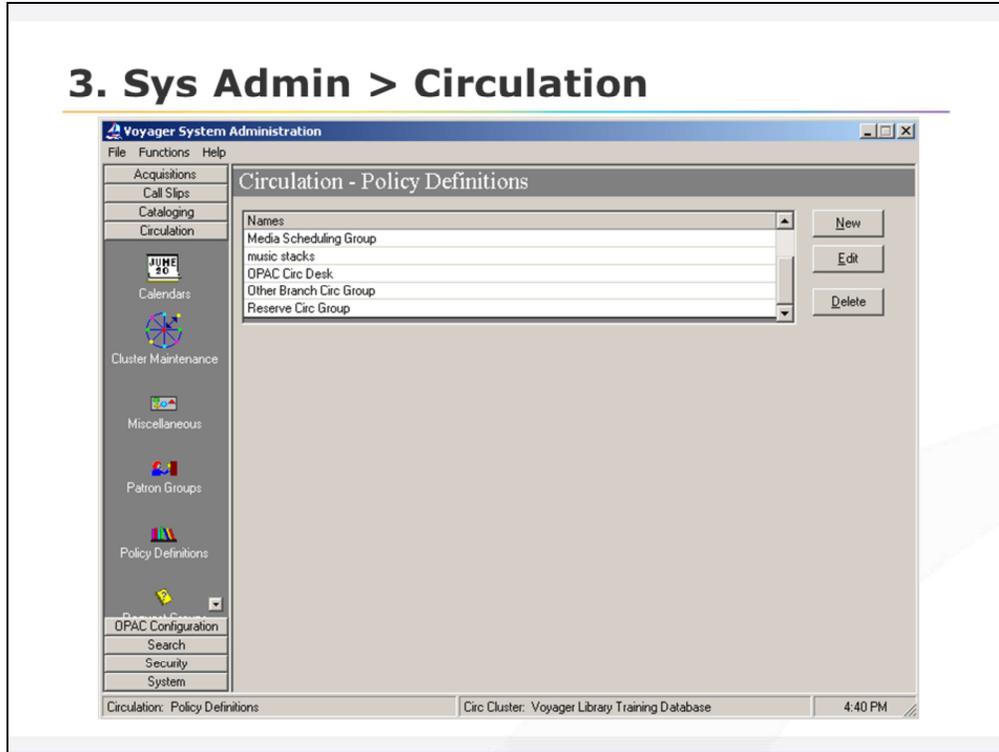
- Call Slip Item Required
- Allow On-shelf OPAC Holds
- OPAC item sort: ascending (dropdown menu)
- Set short loan advance booking days displayed: 1 days
- Show no-fill statuses and copies received for: 1 days

Buttons for "Save" and "Cancel" are located at the bottom of the dialog box.

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Does your site disallow call slips when the bib has no items?
→ Check Call Slip Item Required.

3. Sys Admin > Circulation



A number of other configuration options happen in the Circulation Policy Definitions section of SisAd-min. Here we determine what patron groups will be able to place call slip requests, and on which items.

Policy Definitions

In your Circ Policy Definitions, there are 2 tabs that contain Call Slip values: Patrons and Matrix.

Edit Policy Definition:

Policy Definition | Locations | Policies | Calendar | Patrons | Items | Matrix | Shgrt Loan Matrix

Circ Group Name:

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Let's take a look at the policy definition window.

In your Circ Policy Definitions, there are 2 tabs that contain Call Slip values: Patrons and Matrix.

Patron Policy Definitions

Patron Rules

- Fines/Lost Item Fees Apply Max Outstanding
- Courtesy Notice Apply
- Max Items Borrowed in this Policy Group
- Max Number Of Recalls Apply
- Max Claimed Returns Apply
- Max Call Slip Requests Apply
- Max Short Loan Titles Apply
- Max Overdue Items Apply
- Place Holds Using The OPAC
- Place Short Loans Using The OPAC
- Email Courtesy Notices
- Email Overdue Notices
- Email Recall Notices
- Email Cancellation Notices
- Email (Other) Overdue Notices
- Email (Other) Recall Notices
- Max Short Loan Per Day Apply
- Place Recalls Using The OPAC
- Place Call Slip Requests Using The OPAC
- Email Item Available Notices

Patron Policy Definitions

For each Circ Policy, there are 3 values that affect the Call Slip configuration for specific Patron Groups:

- Max Call Slip Requests Apply
- Place Call Slip Requests Using the OPAC
- Email Item Available Notices

PROPERTIES

How user to leave interaction: [Anytime](#)

How 'Next Slide' Button: [Show always](#)

Completion Button Label: [Next Slide](#)

 Properties...

 Edit in Engage

Policy Definitions>Matrix



Settings Intervals

Charge/Renew Recall Hold Call Slip

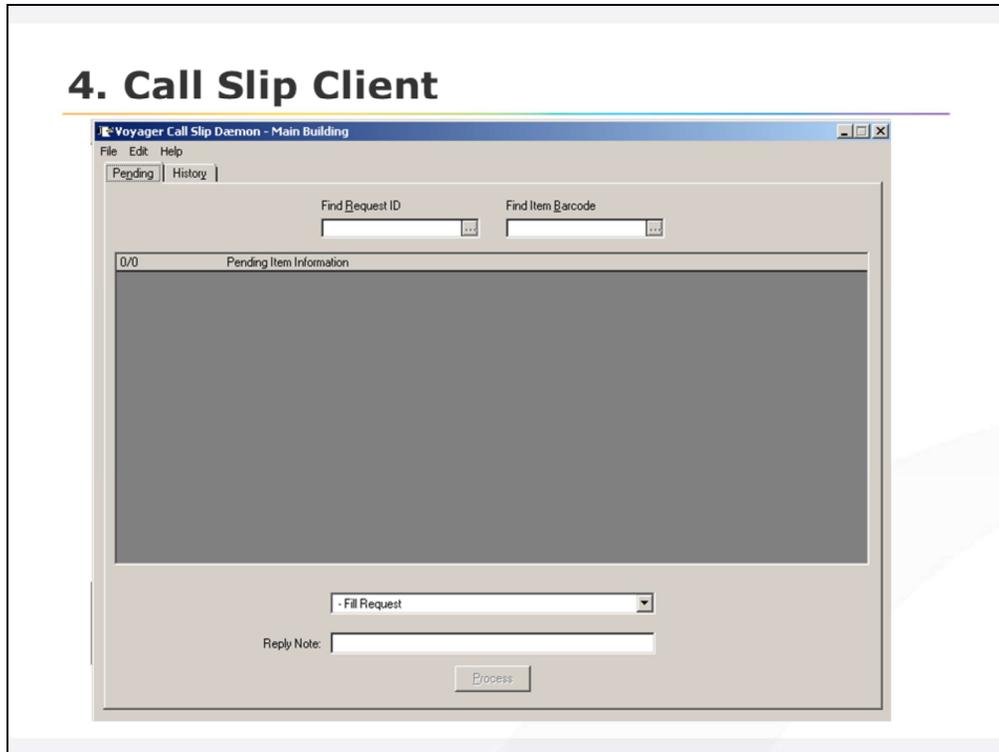
In the matrix, check off

- Call Slip
- Charge/Renew

for each patron group/item type that should be able to place call slip requests

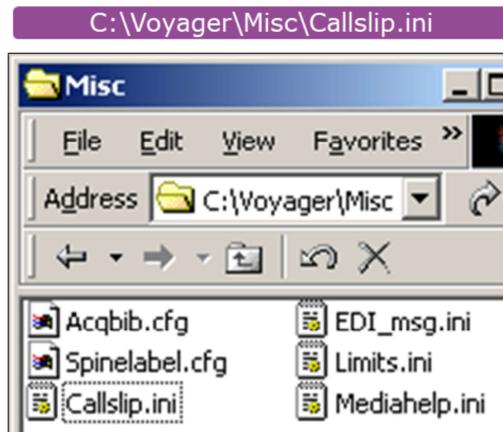
For Patron Groups that are allowed to initiate requests, ensure Call Slip and Charge or Renew are BOTH checked for the item types this Patron Group can request.

4. Call Slip Client



Finally, there are a few pieces that need to be set up in the Call Slip client itself, as well as the call slip configuration file, the Callslip.ini.

Modify Call Slip Configuration File



NOTE: verify that the Callslip.ini is not set to Read-only on the Properties tab!



To get to your Callslip.ini, go to the Voyager folder where your clients live, and look for a folder called Misc. Inside is the Callslip.ini. Before making any changes to your Preferences in Call Slip, make sure that the Callslip.ini is not set to read only.

Modify Call Slip Configuration File

Configure options for:

- Printed call slips
- E-mail templates for filled and unfilled requests

```
[Routing slip Print Template]
Route Item To:
//
Library: \F600
Location: \F601
Address: \F602
\F603
\F604
\F605
\F606
\F607, \F608 \F609
\F610

[Call slip Print Template]
Patron Barcode:\T\A*\F525*\a
//
Call Number:\T\F301
Call Number 2:\MB 852 xx khi\m
Author:\T\F203
Title:\T\F202
Location:\T\F411
Patron Name:\T\F509
Enumeration:\T\F409
Request date:\T\F102
Pickup Location:\T\F105
```

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Modify the Callslip.ini file to ensure the values you want appear on printed Call Slips and Route Slips, as well as the email templates for filled and unfilled requests. More specific information about the codes and formatting of the Callslip.ini can be found in the Call Slip Users Guide.

Modify Call Slip Preferences

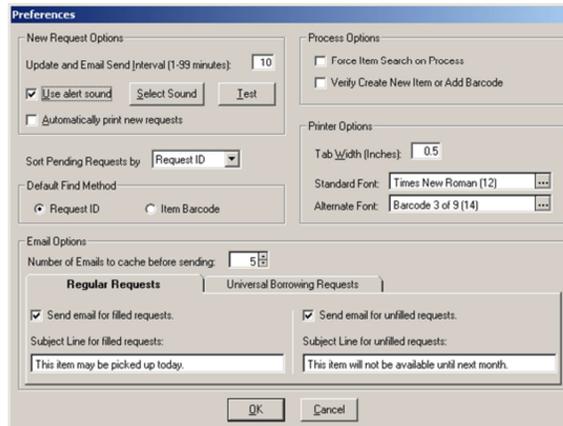
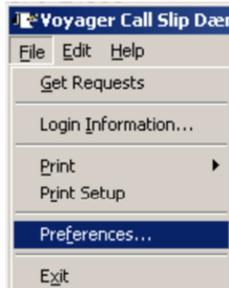


To access Call Slip Preferences, log into Call Slip and select the Call Slip Print Group you need to access in this particular session.

The last bit of setup is in the Call Slip clients Preferences. To access this, you will have to log into the Call Slip client. After providing your username and password, you will see this screen – this is where you specify which Call Slip Group or Queue you are logging into. Choose whichever groups call slips you wish to view and process

Modify Call Slip Preferences

Once you are in the Call Slip client, go to File>Preferences:



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Once the Call Slip client is running, go to File>Preferences
This will allow you to configure more Call Slip Preferences used
by this PC when printing and displaying requests and route slips.
Let's look closely at some of these preferences

Call Slip Client Preferences

Preferences

New Request Options

Update and Email Send Interval (1-99 minutes):

Use alert sound

Automatically print new requests

Sort Pending Requests by: Request ID

Default Find Method

Request ID Item Barcode

Email Options

Number of Emails to cache before sending: 5

Regular Requests | Universal Borrowing Requests

Send email for filled requests. Subject Line for filled requests:

Send email for unfilled requests. Subject Line for unfilled requests:

Standard Font: Times New Roman (12)

Alternate Font: Barcode 3 of 9 (14)

PROPERTIES

How user to leave interaction: [Anytime](#)

How 'Next Slide' Button: [Show always](#)

Completion Button Label: [Next Slide](#)

Part 3: Using Call Slip

How do I go about placing a request, and what work-flow do I use to process this request?



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<another voice>

<end>

Part II: Placing Requests and Using Call Slip.

let us walk through the process step by step.

Request and Process Workflow

Once you've found the title you want, you can click to place a request in two ways:

The screenshot displays a library catalog interface. The main window shows an 'Item Record' for the book '30 days to a more powerful memory / Gini Graham Scott'. A table below the title lists item details:

Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
Main	book	Not Charged			0	14580643

Overlaid on this is a 'Place Request' dialog box. It contains the following fields and options:

- Patron Information:** Name, Barcode, Group, and a checkbox for 'Library Administrative Request'.
- Request Type:** Radio buttons for Hold, Recall, and Call Slip.
- Requesting:** Radio buttons for Title and Copy.
- For Items At:** A dropdown menu currently set to 'Any Location'.
- Pickup At:** A dropdown menu set to 'Circulation Desk'.
- Expires:** A date field set to '11/14/2009'.
- Comment:** A text input field.
- Buttons:** 'OK' and 'Cancel' at the bottom.

In the background, a purple banner reads 'In Circulation . . .'. The ExLibris Voyager logo is visible in the bottom right corner of the interface.

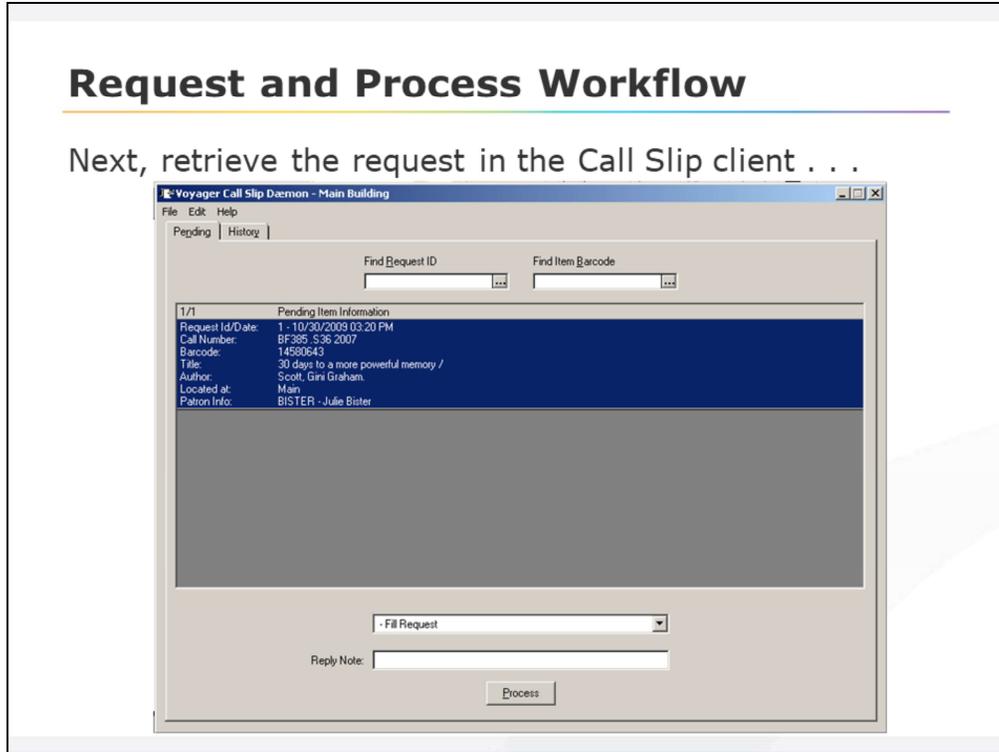
Once you have found the title you want, you can click to place a request in two different ways, <annotate> You can either use Circulation . . .

...Or -- Web Voyage.

Of course, these options will depend on our previous set up in SisAd-min.

Request and Process Workflow

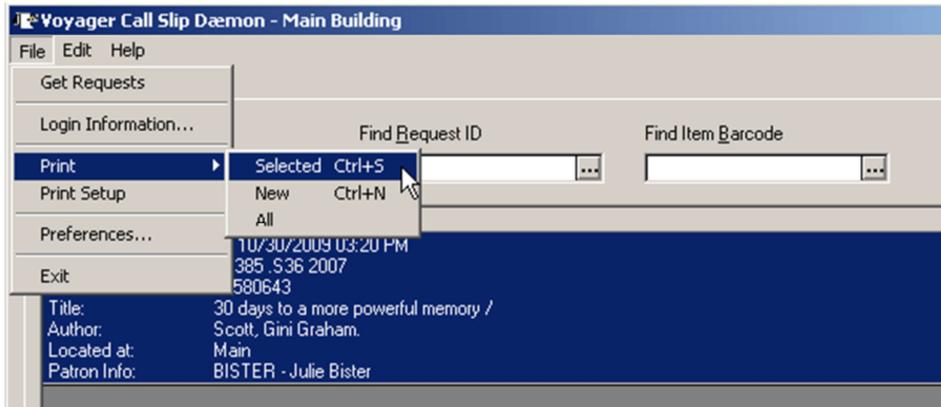
Next, retrieve the request in the Call Slip client . . .



The next step is to open the Call Slip client to view the request you have placed.

Request and Process Workflow

Print out the call slip so staff can retrieve the item from the shelves . . .

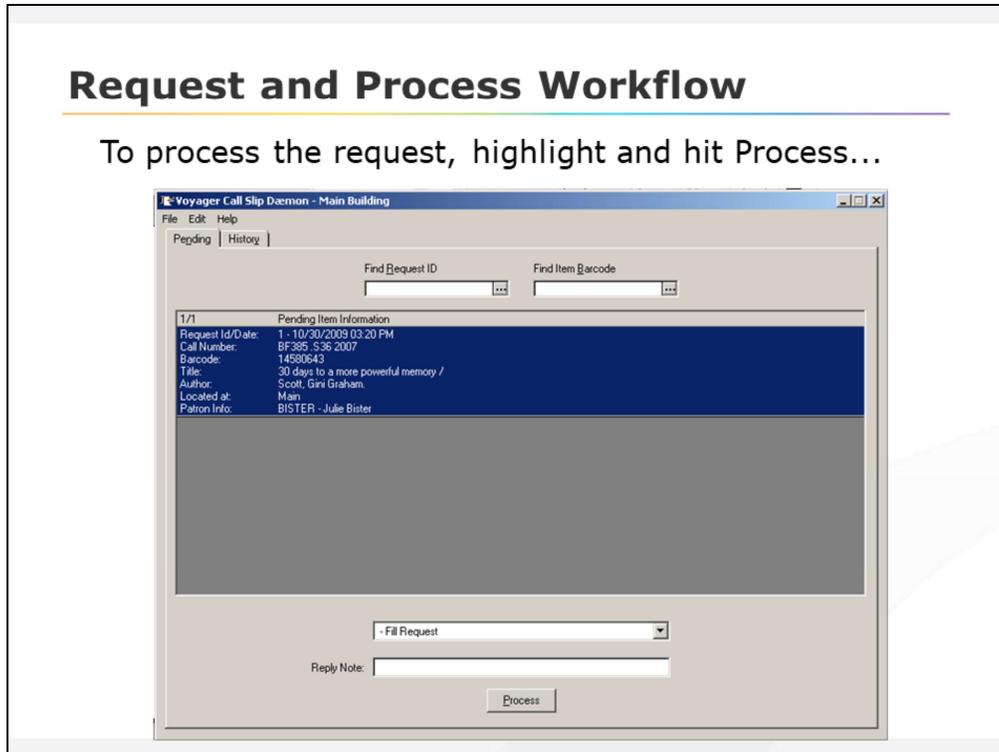


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Now you will want staff to go retrieve the item so you can confirm you can process the request. You can either print the call slip from here on command, or may have already set up your preferences such that new requests auto-print when Call Slip sees them.

Request and Process Workflow

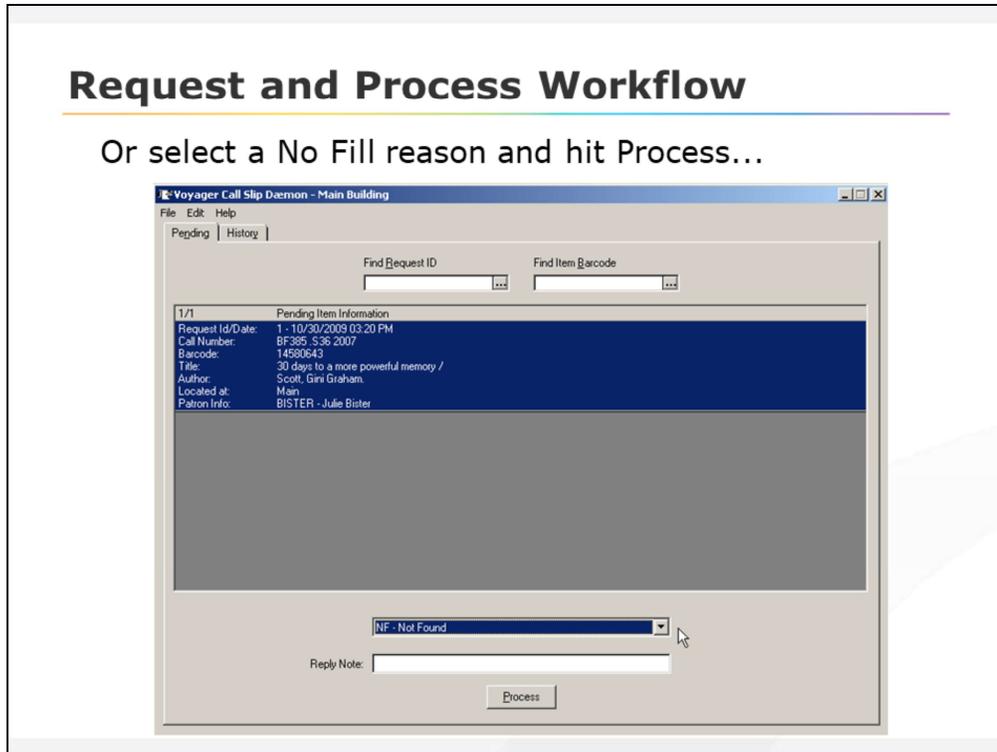
To process the request, highlight and hit Process...



To process a call slip, highlight the request you are ready to accept and hit the Process button at the bottom of the screen.

Request and Process Workflow

Or select a No Fill reason and hit Process...

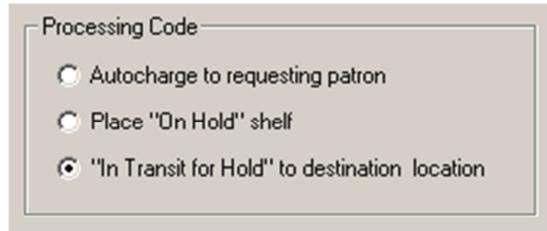


If you cannot fill the request for some reason, instead of leaving the dropdown at Fill, select the appropriate No Fill reason from the dropdown and then hit Process.

Request and Process Workflow

What happens after you process the request?

Think back to the setup for Call Slip Queues in SA>Call Slips>Queues, on the Values tab. The selection you chose there determines what happens next.



Processing Code

- Autocharge to requesting patron
- Place "On Hold" shelf
- "In Transit for Hold" to destination location

What happens after you process the request?

Think back to the setup for Call Slip Queues in SA>Call Slips>Queues, on the Values tab. The selection you chose there determines what happens next.

let us look at the three different possibilities!

Request and Process Workflow

What happens after you process the request?

Think back to the setup for Call Slip Queues in SA>Call Slips>Queues, on the Values tab. The selection you chose there determines what happens next.

Processing Code

- Autocharge to requesting patron
- Place "On Hold" shelf
- "In Transit for Hold" to destination location

Click on your selection

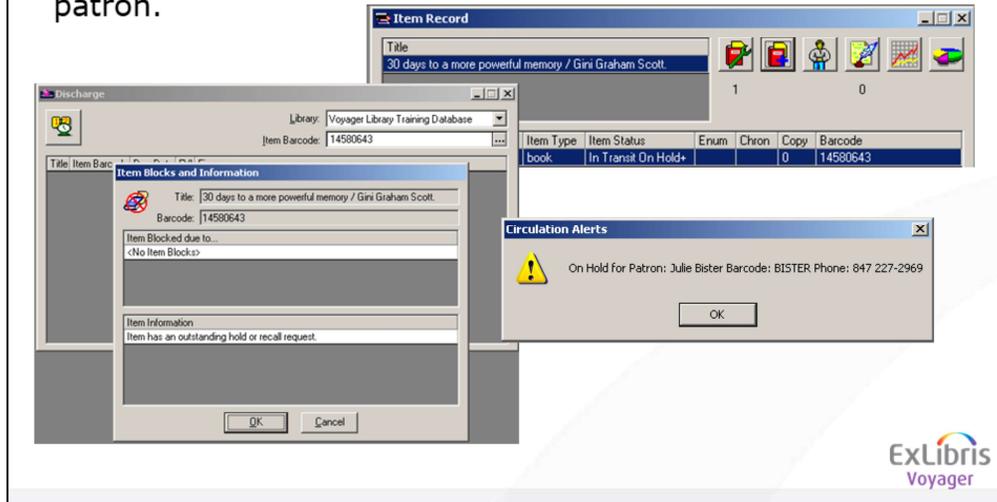
View all options

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<record instructions>click on one of the radio buttons in the screenshot to choose either Autocharge, on hold, or in transit. If you wish to view all these options, click the “view all options” button.

Request and Process Workflow

In Transit On Hold: Item status goes to In Transit On Hold, and must be discharged at the pickup location in order for the item to be placed On Hold for the patron.



If you have selected In Transit On Hold as the Processing Code in Values in SA>Call Slips>Queues, when you process the Call Slip, the items status will immediately change to In Transit On Hold, and you will have to discharge the item at the pickup location in order for the item to be placed On Hold for the patron and Item Available notices to be generated.

Request and Process Workflow

Place "On Hold" Shelf: Item status goes On Hold as soon as you process the call slip, and is immediately available for pickup.

The screenshot displays two overlapping windows from a library management system. The top window, titled 'Item Record', shows the title '30 days to a more powerful memory / Gini Graham Scott' and a table with columns: Location, Item Type, Item Status, Enum, Chron, Copy, and Barcode. The data row shows 'Main', 'book', 'On Hold', an empty cell, '0', and '14580643'. The bottom window, titled 'Request Maintenance', shows the same title and a table with columns: Perm Location, Temp Location, Item Type, Item Status, Copy, and Barcode. The data row shows 'Main', an empty cell, 'book', 'On Hold', '0', and '14580643'. Below this is another table with columns: Patron Name, Pickup Location, Expires, Level, Type, Items, Status, and Rank. The data row shows 'Julie Bister', 'Circulation Desk', '11/4/2009 11:59 PM', 'C', 'H', '1', 'Pending', and '1'.

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If you had "Place **On Hold** shelf" checked, as soon as you process the call slip, the item will be available to the patron for pick up. you do not have to go through the extra step of discharging the item.

Request and Process Workflow

Autocharge: When the call slip is processed, the item is immediately charged to the requesting patron.

The screenshot displays two overlapping windows from a library management system. The 'Charged To' window is in the foreground, showing patron information for Julie Bister. The 'Item Record' window is partially visible behind it, showing item details for a book.

Charged To

Patron: Julie Bister
Patron Barcode: BISTER
Address: Ex Libris Group
Customer Support
1350 E. Touhy Ave. Suite 200 East
Des Plaines, IL 60018 USA
Address Type: Permanent

Proxy Patron:
Charge Date: 10/30/2009 03:53 PM
Due Date: 11/27/2009 11:59 PM
Recalled:
Renewal Date: Renewal Due Date:

OK

Item Record

Title: 30 days to a more powerful memory / Gini Graham Scott.

Item Type	Item Status	Enum	Chron	Copy	Barcode
book	Charged			0	14580643

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If you had Autocharge to Requesting Patron checked, as soon as you process the call slip, the item will be charged out to the patron who requested the item.

Request and Process Workflow

Autocharge: When the call slip is processed, the item is immediately charged to the requesting patron.

The screenshot displays two overlapping windows from a library management system. The 'Charged To' window is in the foreground, showing patron information for Julie Bister. The 'Item Record' window is partially visible behind it, showing item details for a book.

Charged To

Patron: Julie Bister
Patron Barcode: BISTER
Address: Ex Libris Group
Customer Support
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Des Plaines, IL 60018 USA
Address Type: Permanent
Proxy Patron:
Charge Date: 10/30/2009 03:53 PM
Due Date: 11/27/2009 11:59 PM
Recalled:
Renewal Date: Renewal Due Date:
OK

Item Record

Title: 30 days to a more powerful memory / Gini Graham Scott
0 0

Item Type	Item Status	Enum	Chron	Copy	Barcode
book	Charged			0	14580643

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If you had Autocharge to Requesting Patron checked, as soon as you process the call slip, the item will be charged out to the patron who requested the item.

Request and Process Workflow

Place "On Hold" Shelf: Item status goes On Hold as soon as you process the call slip, and is immediately available for pickup.

The screenshot displays two overlapping windows from a library management system. The top window, titled 'Item Record', shows the title '30 days to a more powerful memory / Gini Graham Scott' and a table with columns: Location, Item Type, Item Status, Enum, Chron, Copy, and Barcode. The bottom window, titled 'Request Maintenance', shows the same title and a table with columns: Perm Location, Temp Location, Item Type, Item Status, Copy, and Barcode. Below this is another table with columns: Patron Name, Pickup Location, Expires, Level, Type, Items, Status, and Rank.

Location	Item Type	Item Status	Enum	Chron	Copy	Barcode
Main	book	On Hold			0	14580643

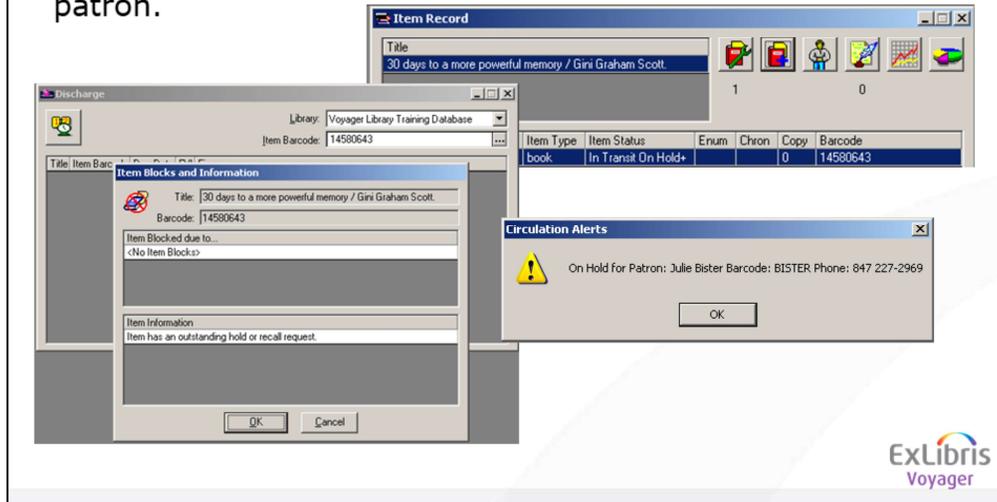
Perm Location	Temp Location	Item Type	Item Status	Copy	Barcode
Main		book	On Hold	0	14580643

Patron Name	Pickup Location	Expires	Level	Type	Items	Status	Rank
Julie Bister	Circulation Desk	11/4/2009 11:59 PM	C	H	1	Pending	1

If you had "Place **On Hold** shelf" checked, as soon as you process the call slip, the item will be available to the patron for pick up. you do not have to go through the extra step of discharging the item.

Request and Process Workflow

In Transit On Hold: Item status goes to In Transit On Hold, and must be discharged at the pickup location in order for the item to be placed On Hold for the patron.



If you have selected In Transit On Hold as the Processing Code in Values in SA>Call Slips>Queues, when you process the Call Slip, the items status will immediately change to In Transit On Hold, and you will have to discharge the item at the pickup location in order for the item to be placed On Hold for the patron and Item Available notices to be generated.

Request and Process Workflow

Next steps (if not autocharged):

- Print or email the Item Available Notice from Reporter (varies based on the SA>Circ>Policy Definitions>Patron setting we discussed earlier!)
- circjob 5 must be run (on the server) in order to get the Item Available Notices printed or emailed.

Patron Rules

Fines/Lost Item Fees Apply Max Outstanding Balance: \$10.00 Min Balance For Notice: \$5.00

Courtesy Notice Apply Overdue Notice Apply

Max Items Borrowed in this Policy Group 20 Max Overdue Recalled Items Apply 1

Max Number Of Recalls Apply 20 Max Self-Shell Returns Apply 4

Max Claimed Returns Apply 4 Max Lost Items Apply 1

Max Call Slip Requests Apply Max Short Loan Apply

Max Short Loan Titles Apply Max Short Loan Per Day Apply

Max Overdue Items Apply 5

Place Holds Using The OPAC Place Recalls Using The OPAC

Place Short Loans Using The OPAC Place Call Slip Requests Using The OPAC

Email Courtesy Notices Email Cancellation Notices Email Item Available Notices

Email Overdue Notices Email (Other) Overdue Notices

Email Recall Notices Email (Other) Recall Notices

OK Cancel

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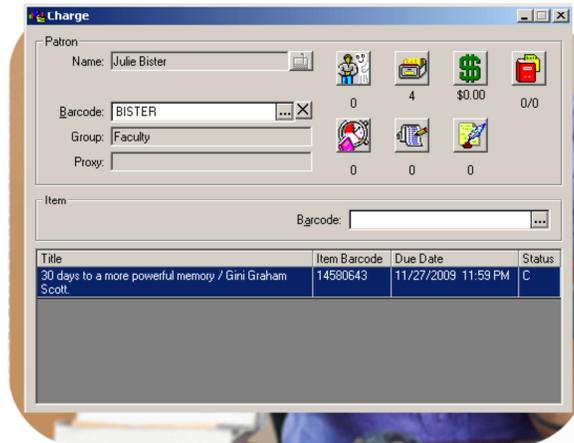
The Next steps are:

Print or email the Item Available Notice from Reporter (varies based on the SA>Circ>Policy Definitions>Patron setting we discussed earlier!)

circjob 5 must be run (on the server) in order to get the Item Available Notices printed or emailed.

Request and Process Workflow

Final step – when the requesting patron receives the Item Available Notice and comes to the Circ Desk, charge the item out to the patron!



The screenshot shows the LCharge software interface. The 'Patron' section includes a name field with 'Julie Bister', a barcode field with 'BISTER', and a group field with 'Faculty'. There are also several icons and numerical values: a person icon with '0', a book icon with '4', a dollar sign icon with '\$0.00', and a red icon with '0/0'. Below the 'Item' section, there is a table with the following data:

Title	Item Barcode	Due Date	Status
30 days to a more powerful memory / Gini Graham Scott.	14580643	11/27/2009 11:59 PM	C

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Final step – when the requesting patron receives the Item Available Notice and comes to the Circ Desk, charge the item out to the patron!

Summary

- Pre-configuration
- Configuration
 - SysAdmin > Call Slip
 - SysAdmin > OPAC
 - SysAdmin > Circulation
 - Call Slip client
- Request and Process Workflow

<record >That concludes the request and process workflow.

<click> Let's sum up what we've did in this lesson:

- We saw pre-configuration decisions that need to be determined before implementing Call Slip, such as call slip queues.
- Then, we went through the 4 general areas in which call slip is configured
- And finally, we went through the workflow of placing a request, and processing it.

Thank you for taking the time to view this lesson.

Thank You!

[Ex Libris Support](#)



We Hope you found this lesson helpful.

If you have any questions please forward them to our Support teams.

Thank you for taking the time to view this lesson.