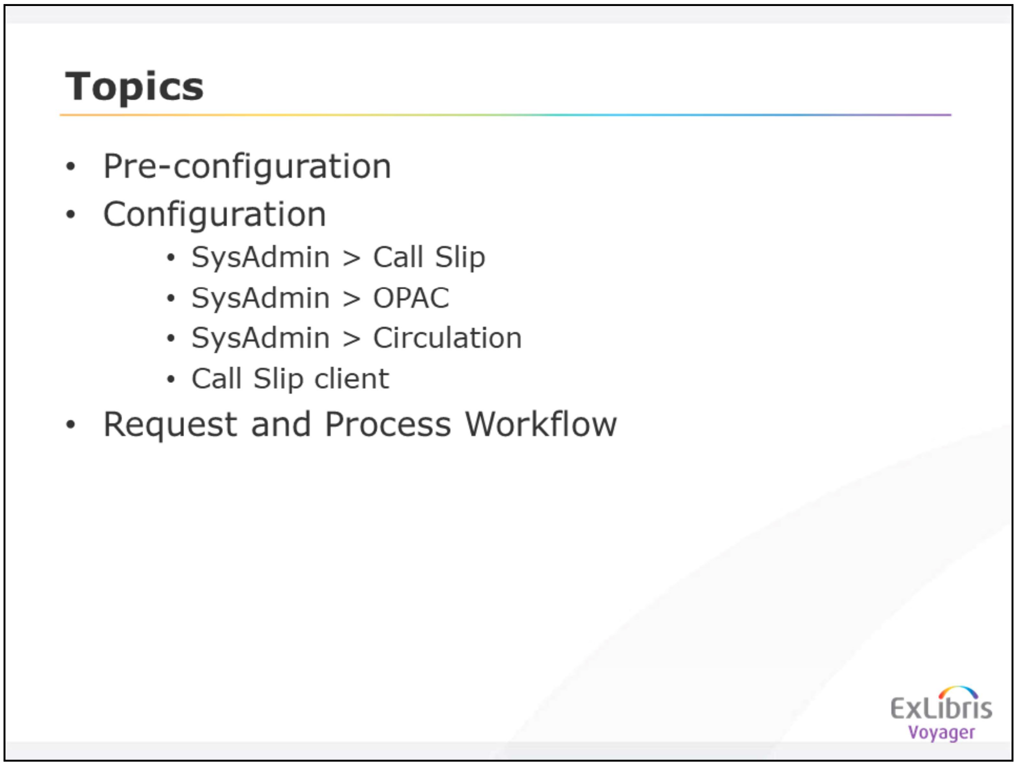
ExLibris
The bridge to knowledge

Setting Up Call Slip:

Configuration and Workflow

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

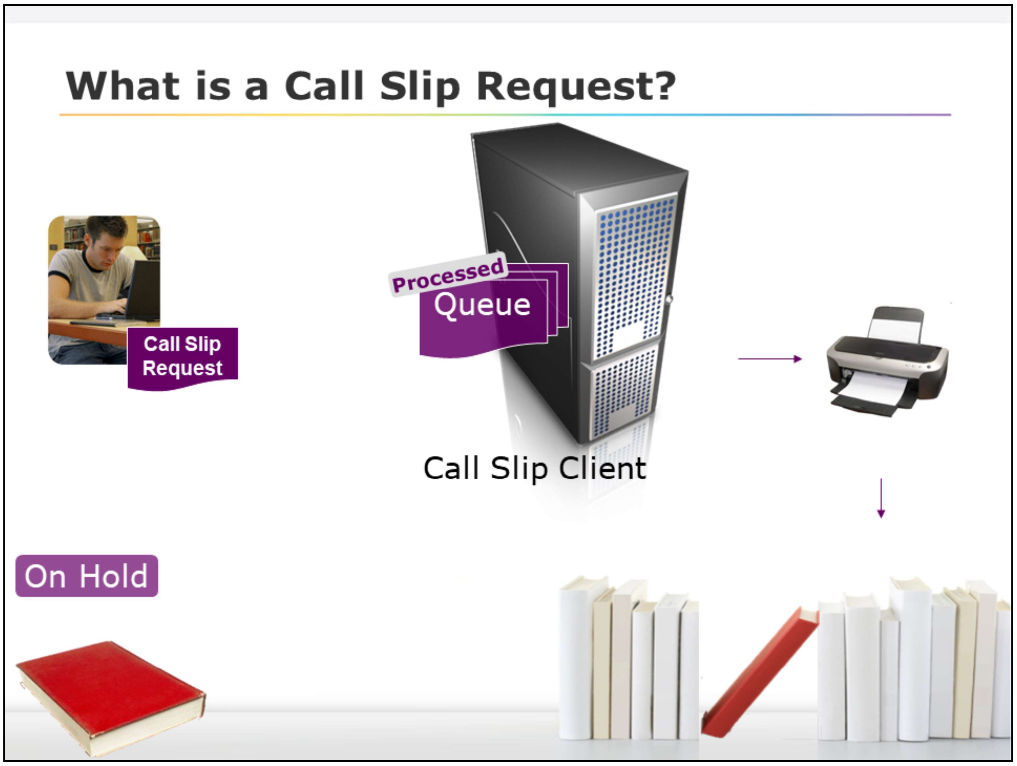


<record> In this lesson you will become familiar with the call slip configuration and workflow.

•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.

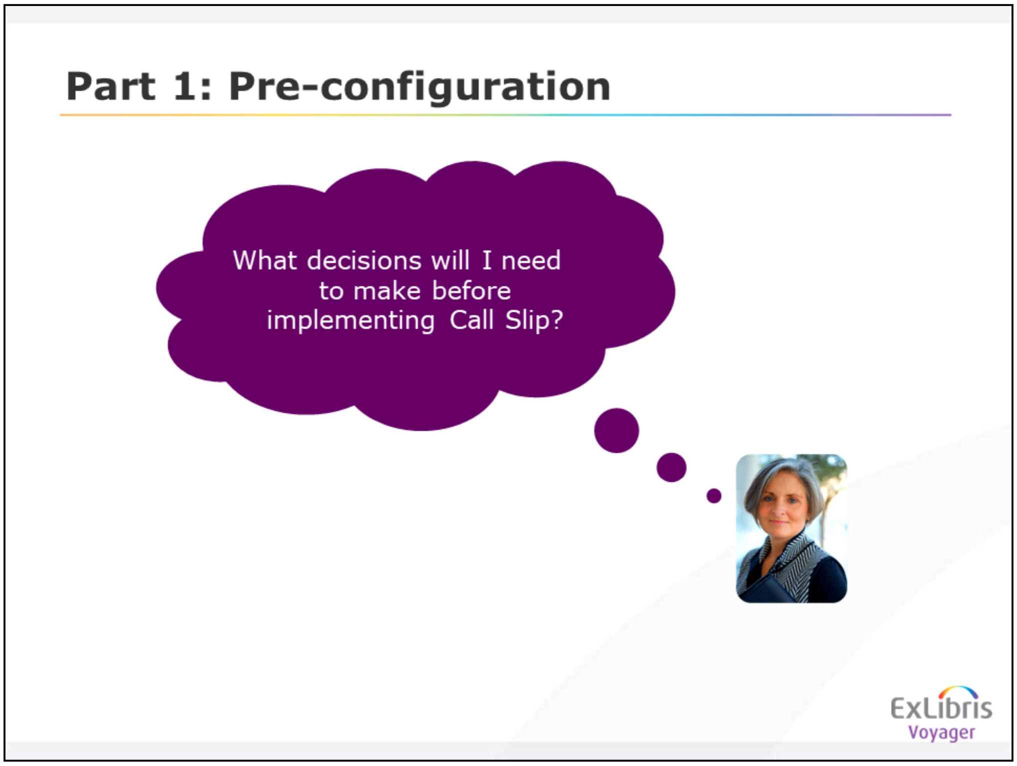


a Call Slip Request is a form filled out by a library patron to request a particular item.

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!

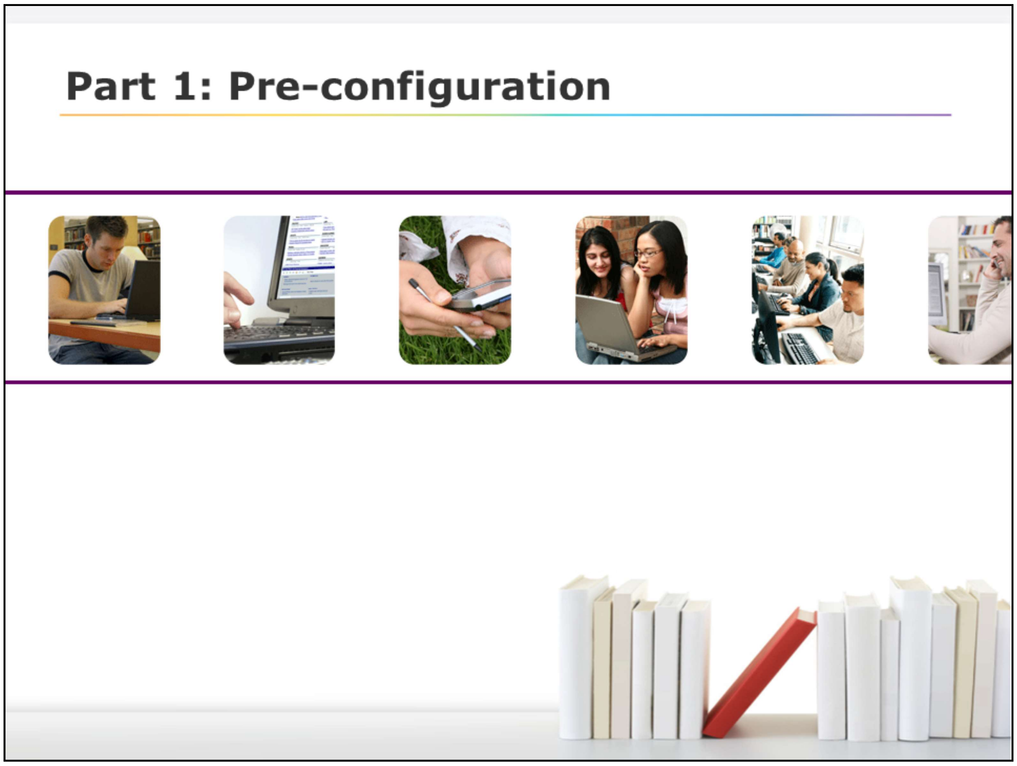


Part 1: Pre-configuration

<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.



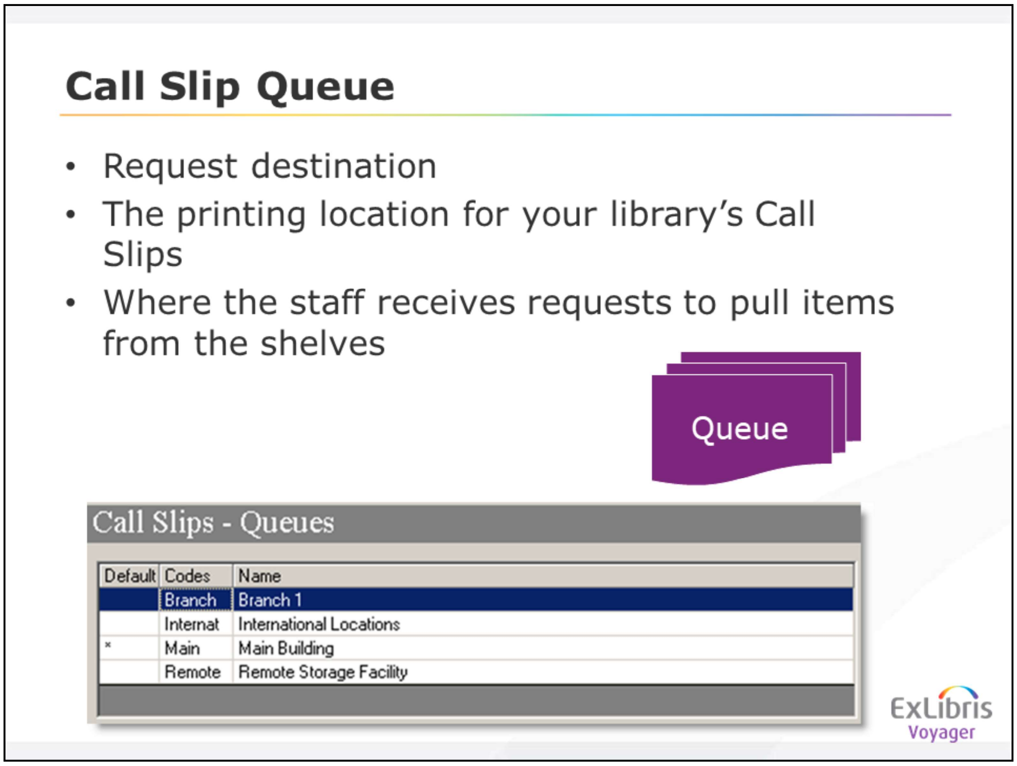
Before you can use Call Slip, there are a few things to identify.

•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.

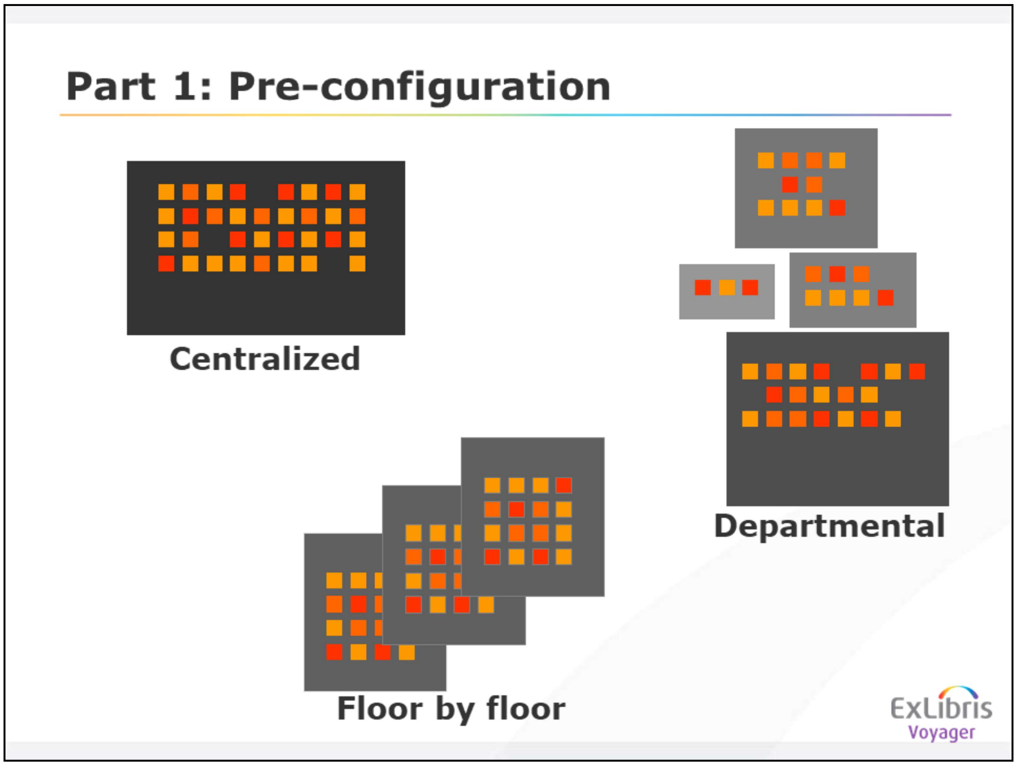
NOTE: The PCs can literally be anywhere in your library.

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

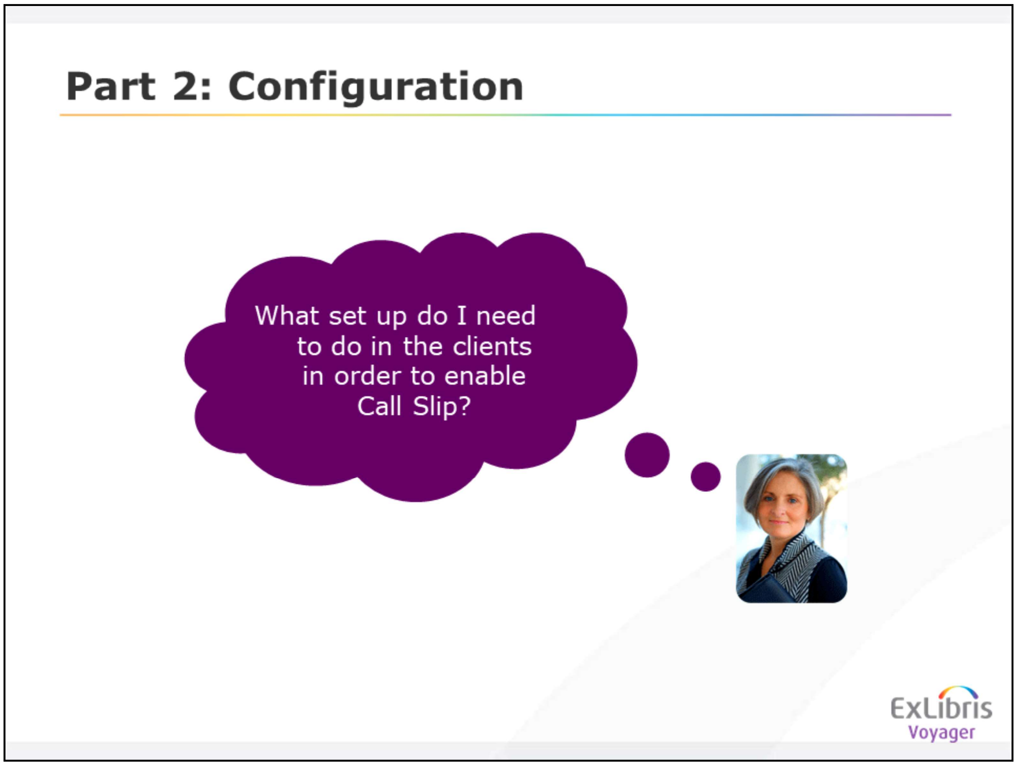


A request destination is called a Call Slip Queue. It is the printing location for your librarys Call Slips. this is where library staff will receive notices to pull items from the shelves. You need to decide which of these will become Call Slip Queues for your site.

Whatever makes sense, for your library.

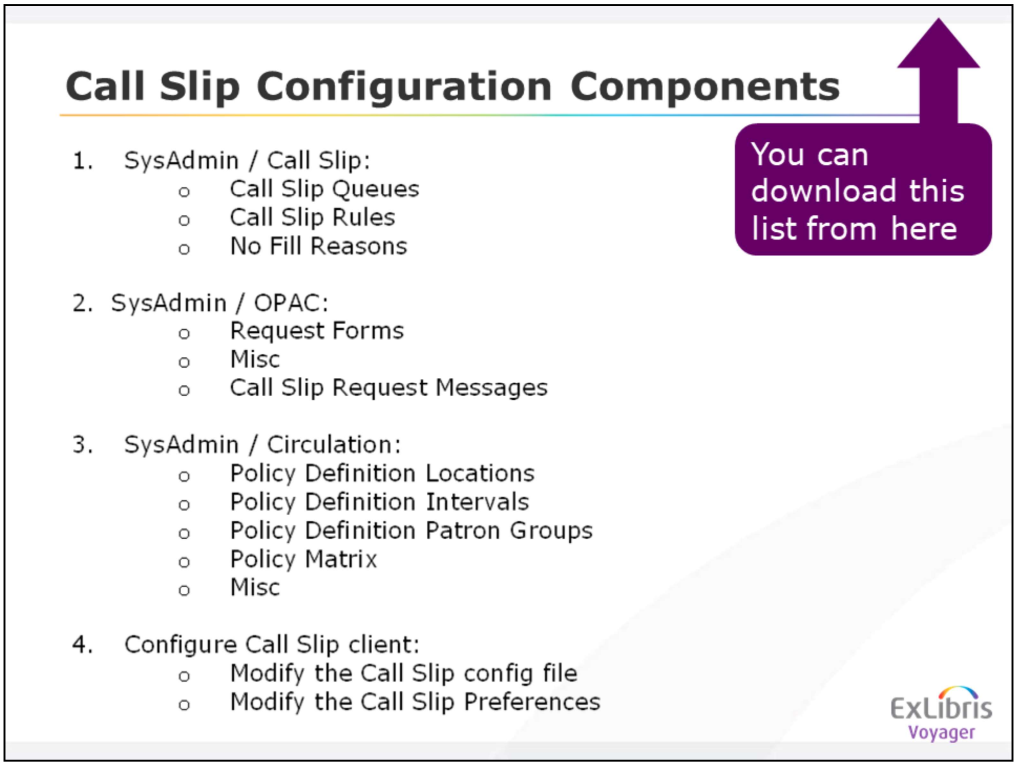


- If your library is completely ***centralized***, then one PC can receive all requests for your library.
- If you have ***departmental libraries*** that circulate their own items, you may need one PC near each departments Circulation Happening location.
- Perhaps you should have one PC receiving requests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



<another voice>
<end>

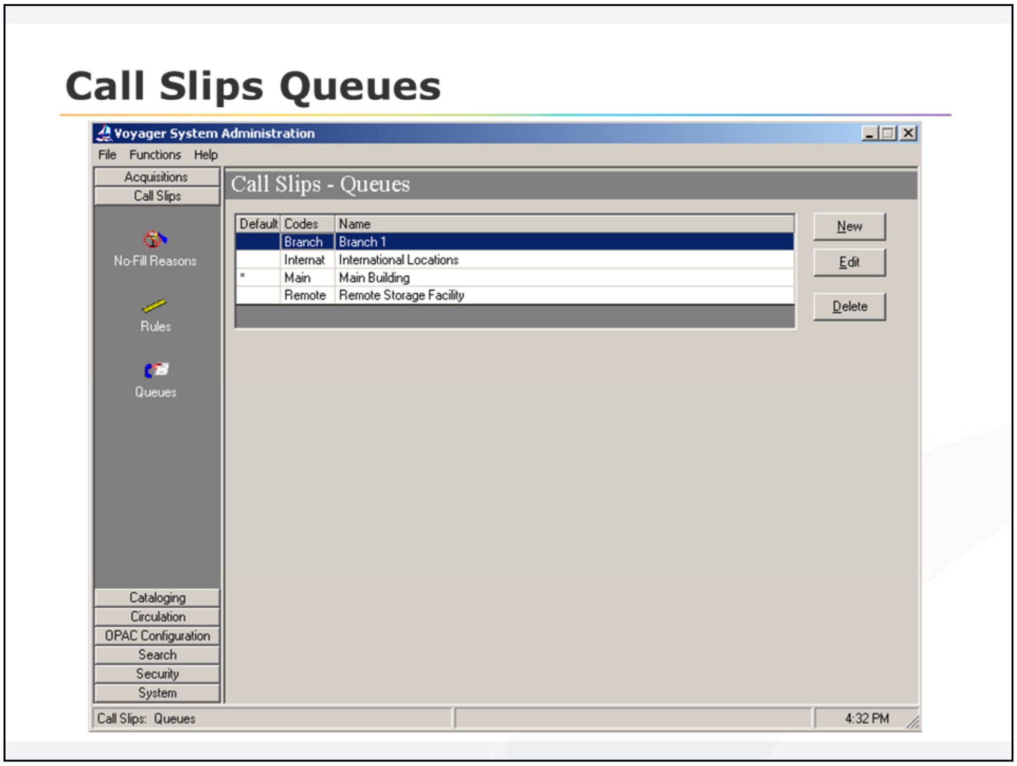
There are a number of different areas, in the SisAd-min and Call Slip clients that we will need to look at, in order to enable this functionality.



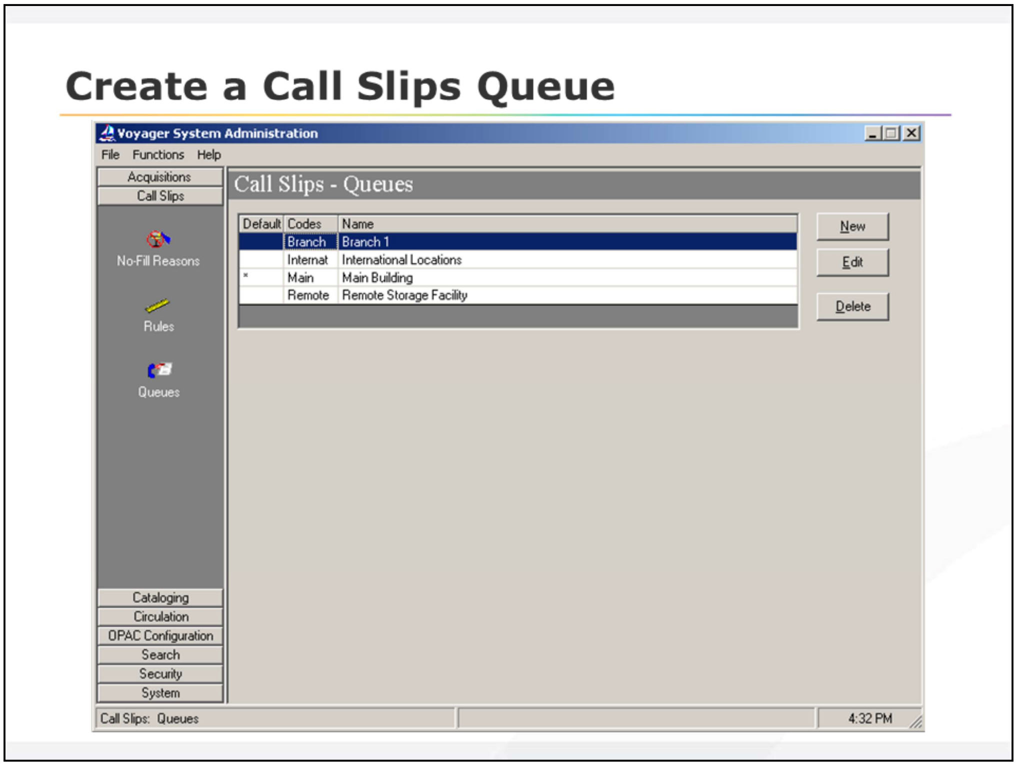
There are 4 general areas we will need to edit to complete configuration – to start, here is a brief checklist. we will visit each of these areas in depth in a moment.

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



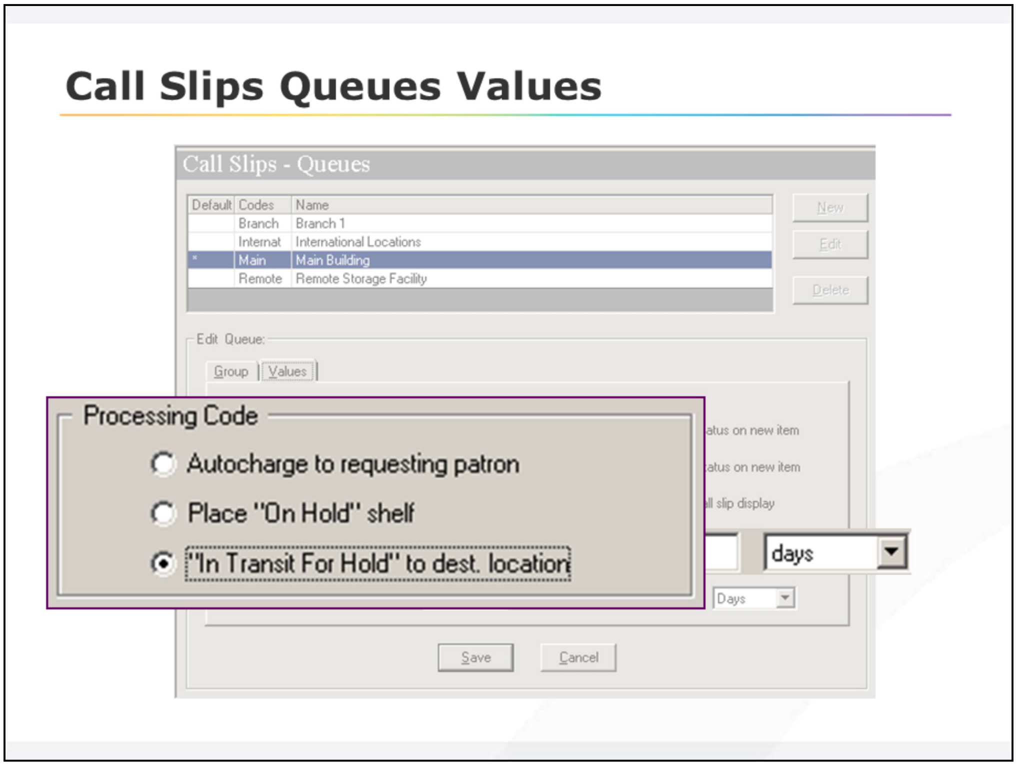
let us start in the SisAd-min clients Call Slips>Queues section.



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.



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).

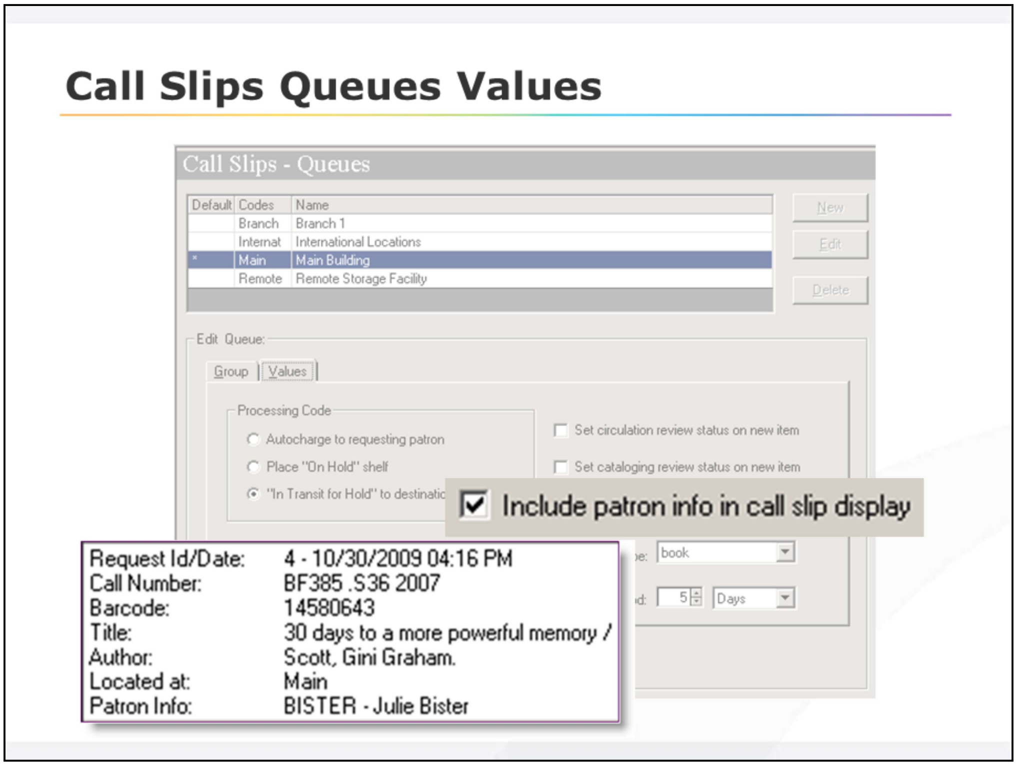
On the bottom part of the Call Slips Queues window we see the **Expiry and archive periods** <annotate>.

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.

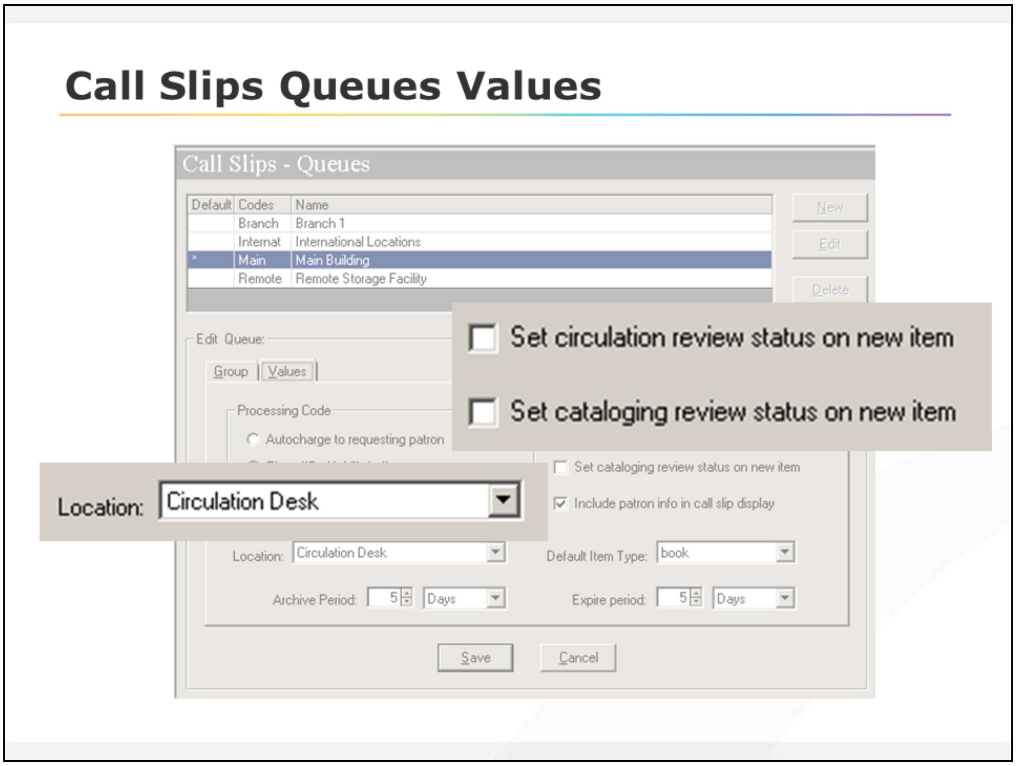
•<click> Archive Period: is the number of days before non-active call slip gets archived. Once a request is archived, it will no longer show in the patron information display in Web Voyahge.

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



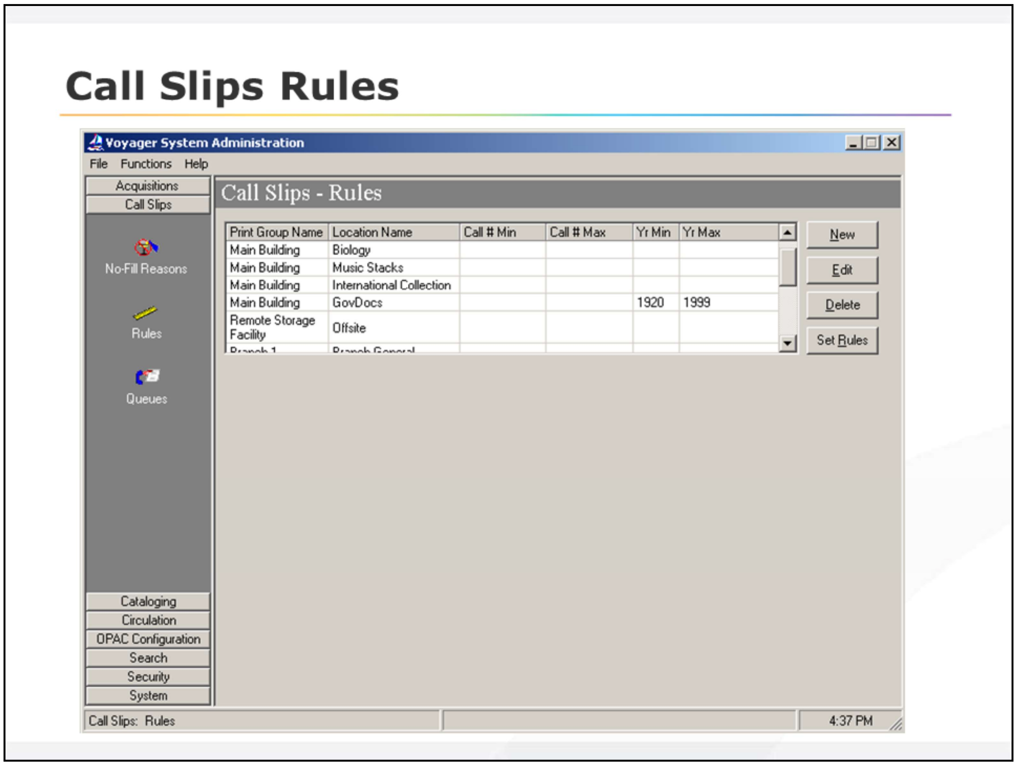
This flag determines whether patron information will be displayed on the screen in Call Slip:

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



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.



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

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

•<click> Is this patron eligible to place requests?

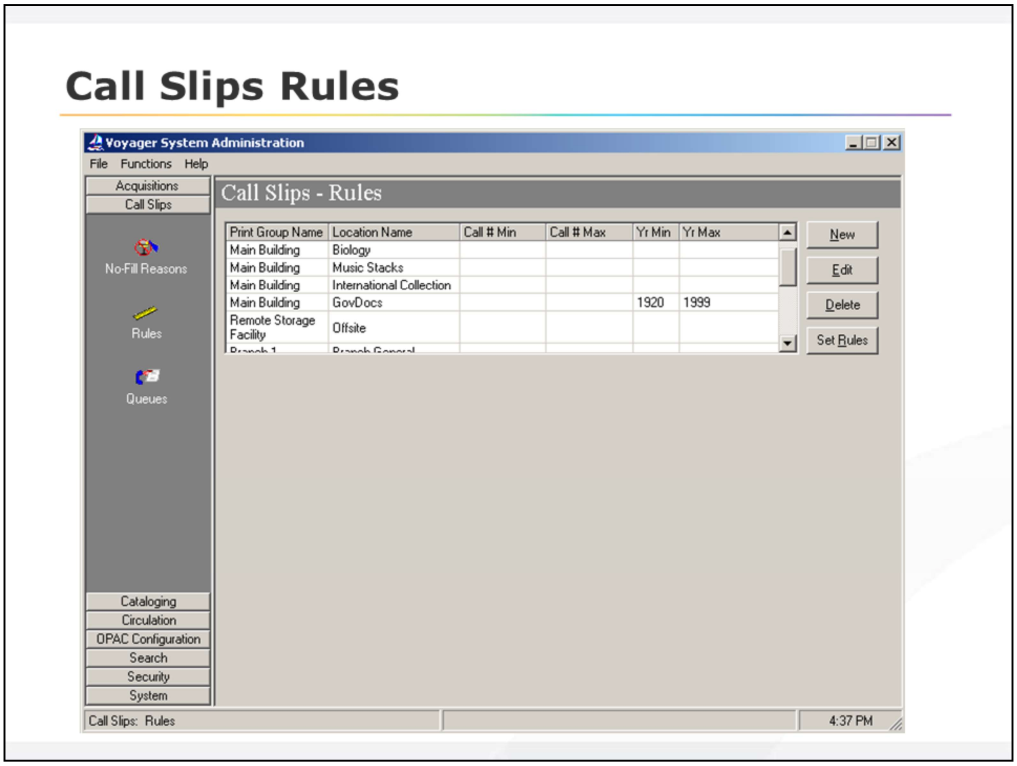
•<click> Can this item be requested by this patron?

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.



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

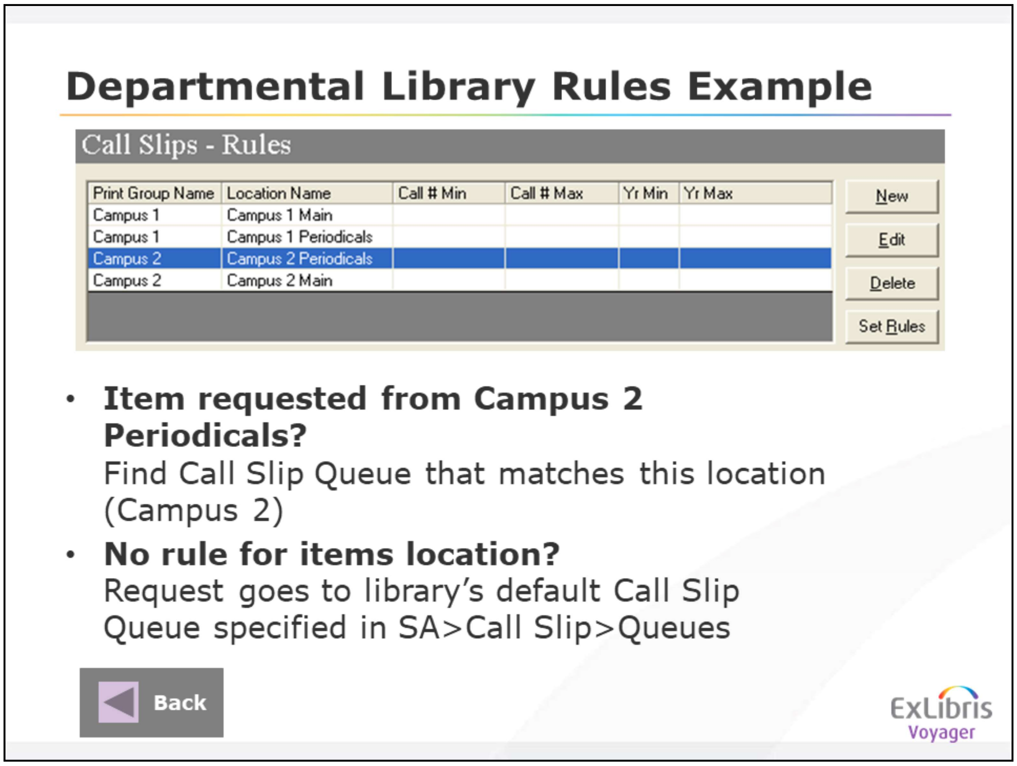
Would You Like to See an Example?

Departmental Library Example

Centralized Library Example

Skip

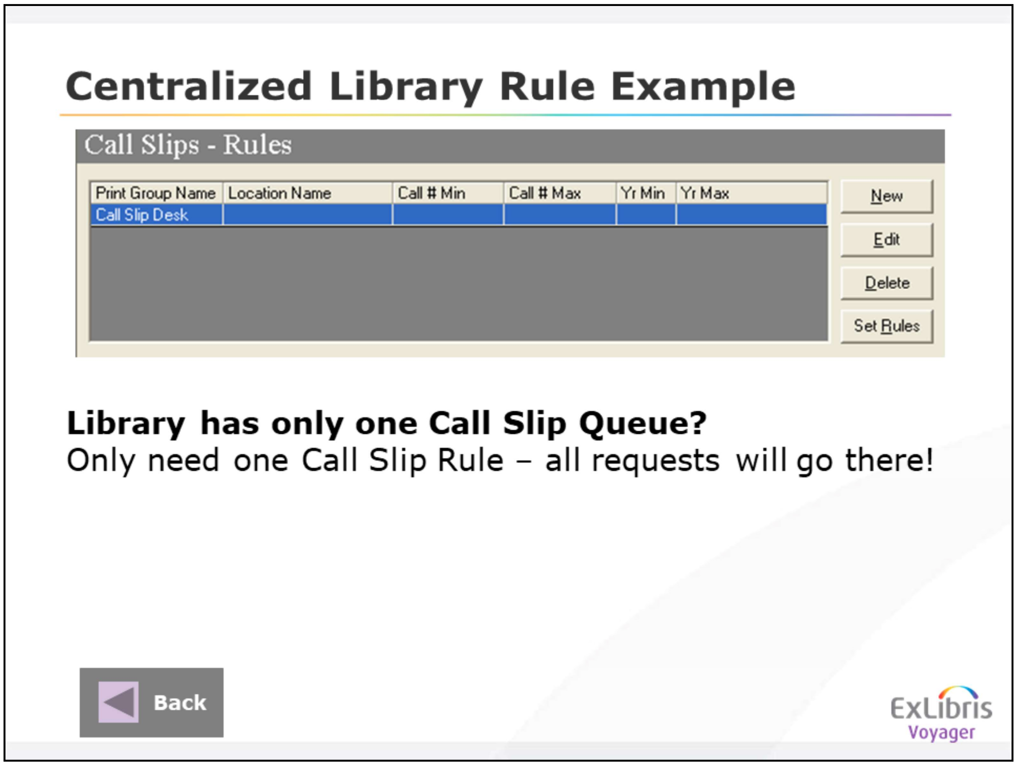
ExLibris Voyager



Lets look at an example for a departmental library:

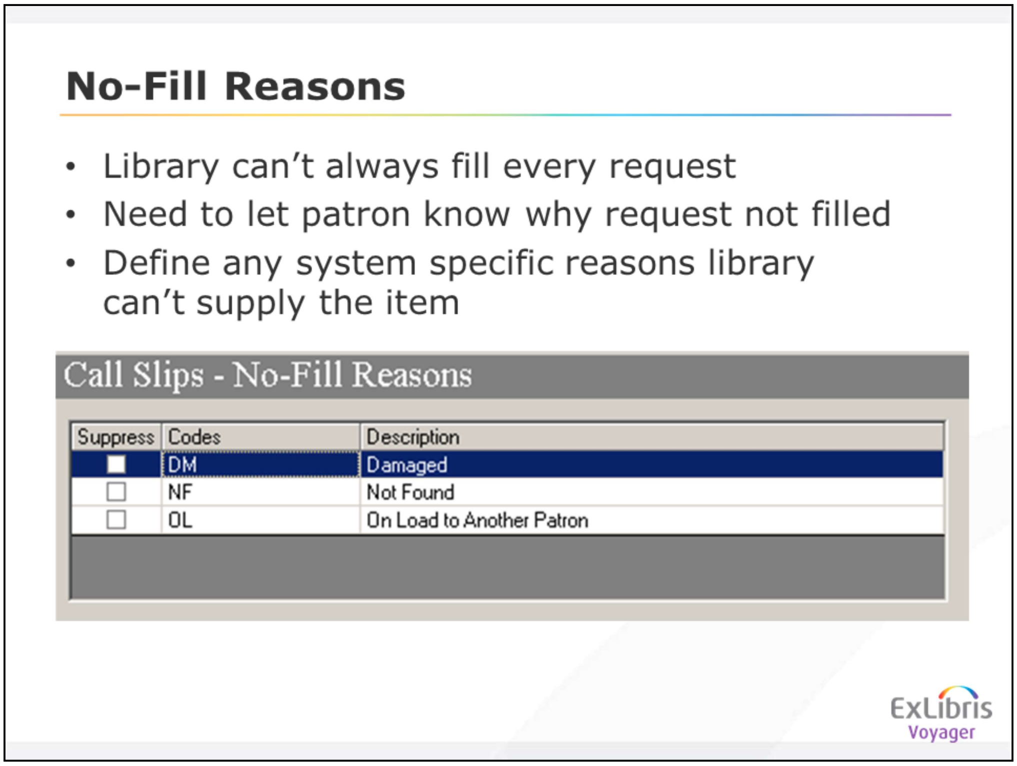
If an item is requested from Campus 2 Periodicals, Voyager will look down the **Location** column until it finds the shelving location for Campus 2 Periodicals. The correct Call Slip Queue (in the column Print Group Name) for this request is **Campus 2**.

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



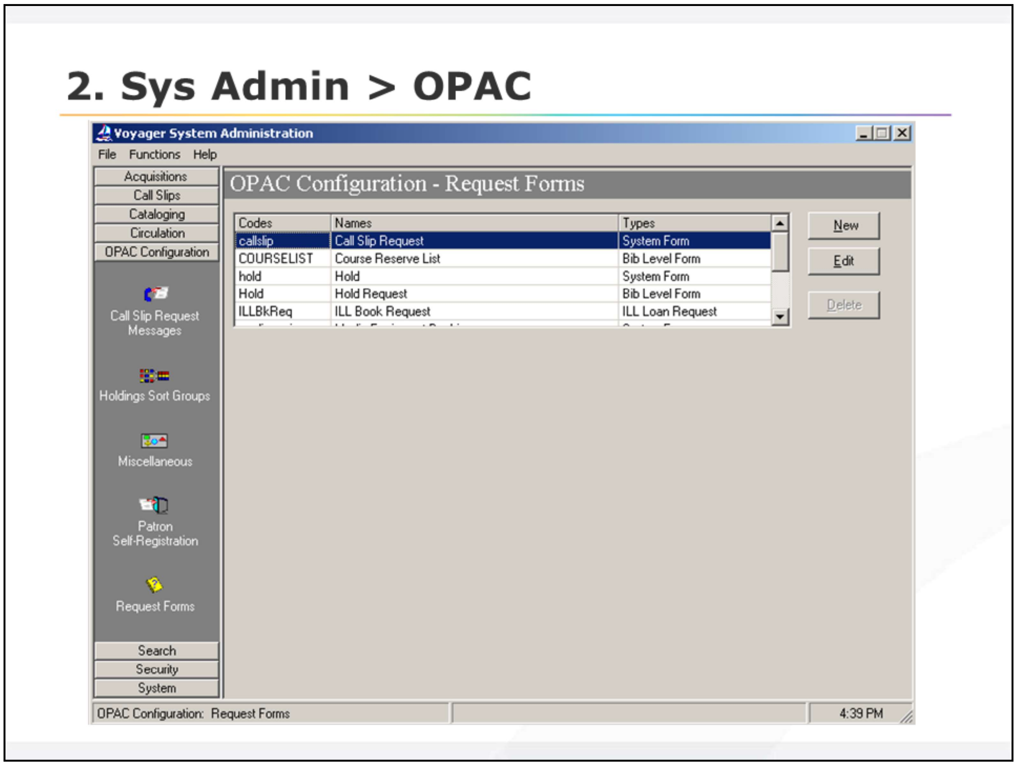
Now lets look at an example for a centralized library:

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.

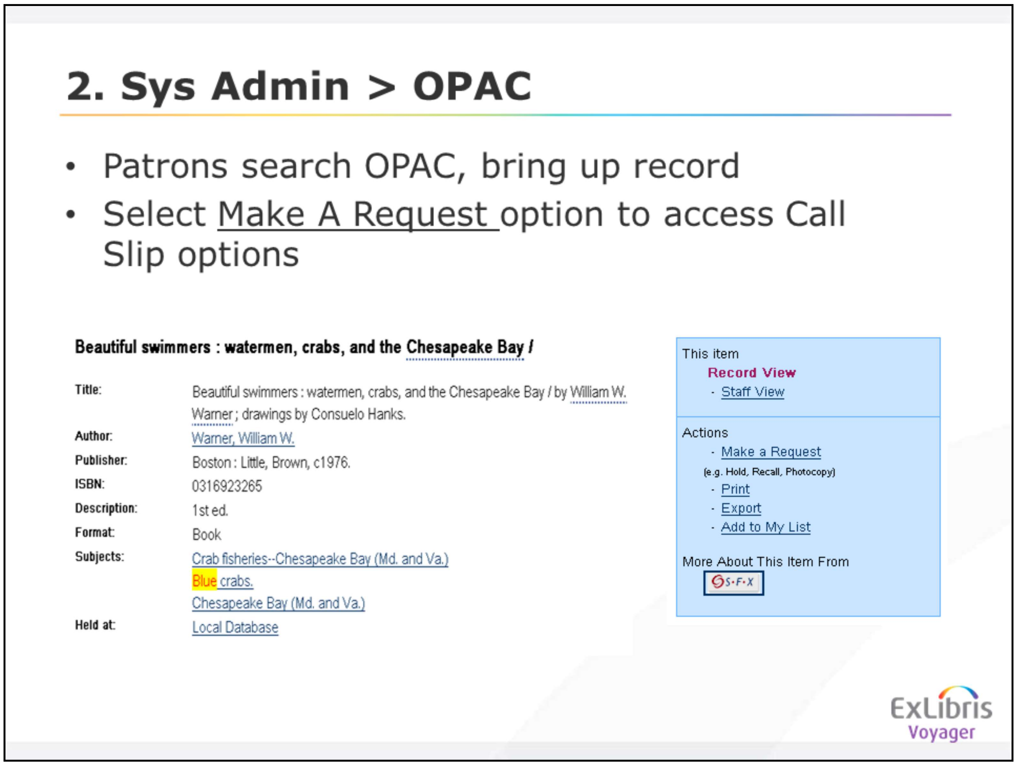


If the request cannot be filled, library staff need to identify the reason when no-filling the request.

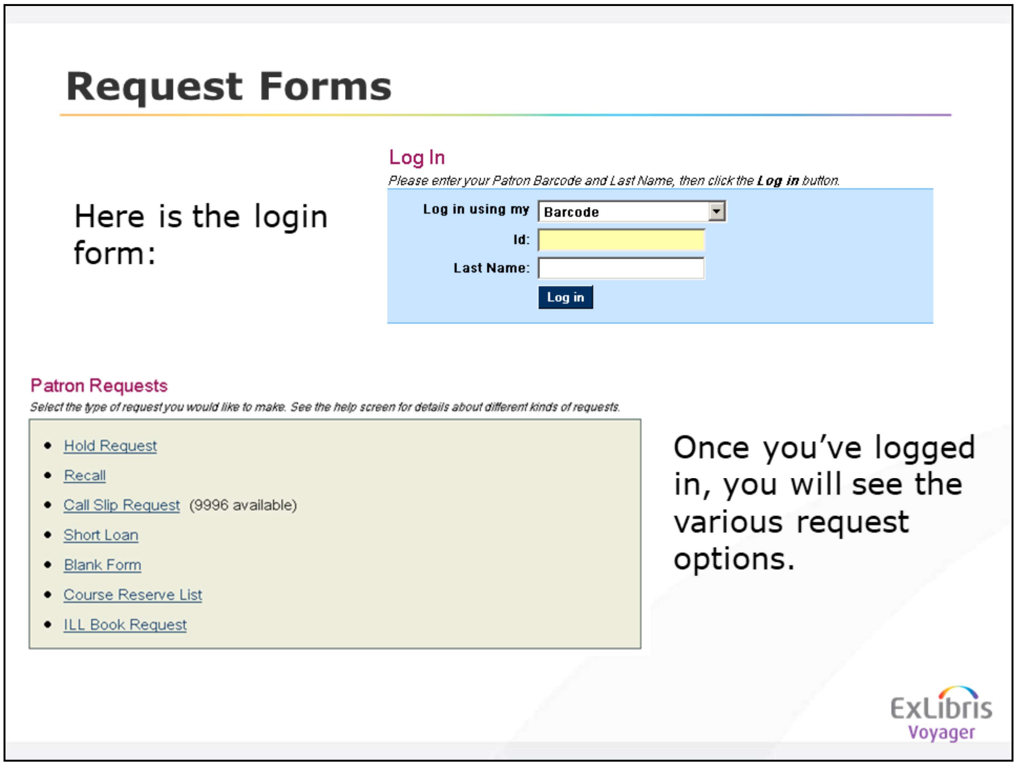
Your library creates appropriate no-fill reasons in System Administration.



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.



A patron will search Web Voyahge, 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.

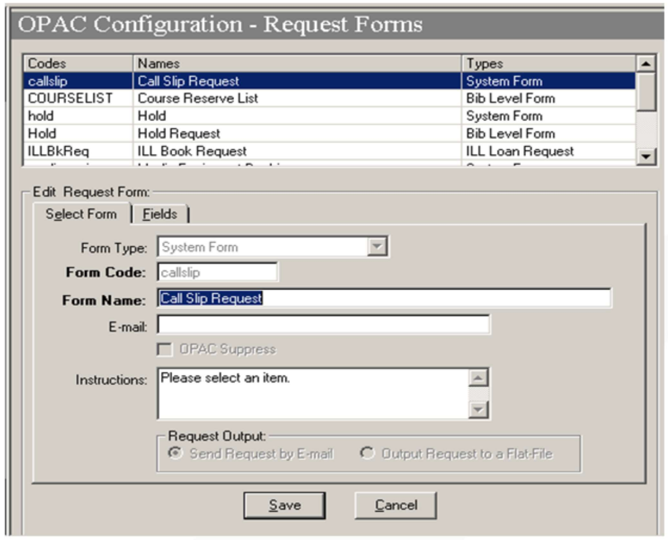


here is an example of the login form, and the Patron Requests screen that displays once you have logged in. You can see the call slip request option displayed, along with a count of how many call slip requests the patron can make before being blocked.

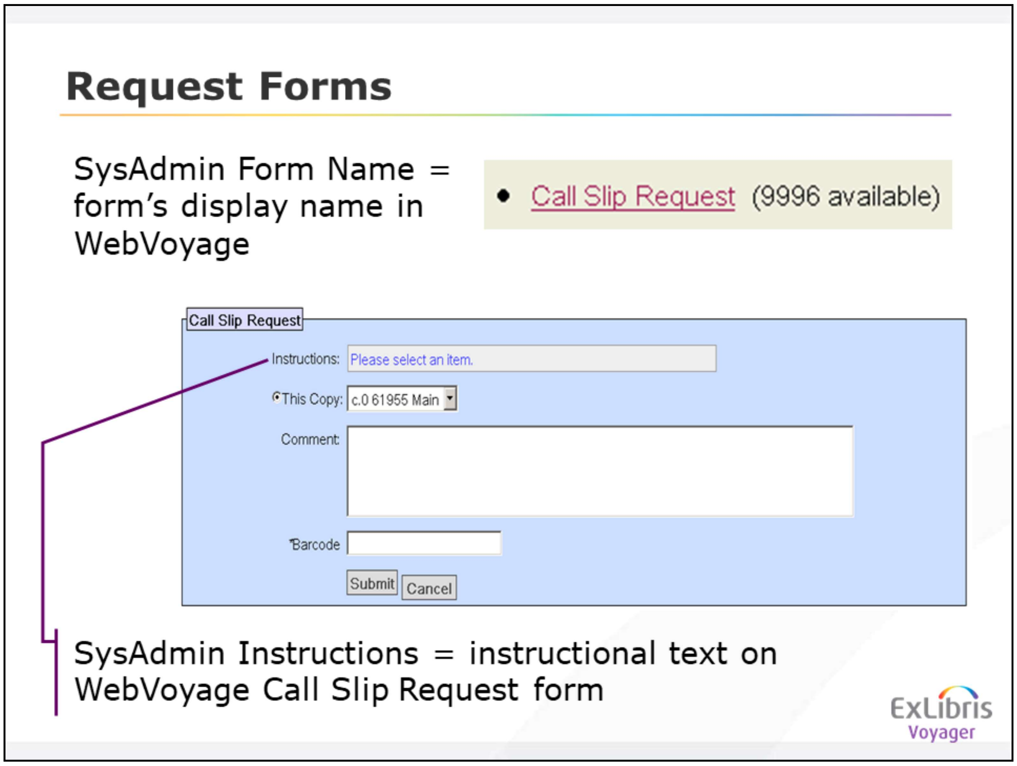
Request Forms

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

- Form Name
- Instructions

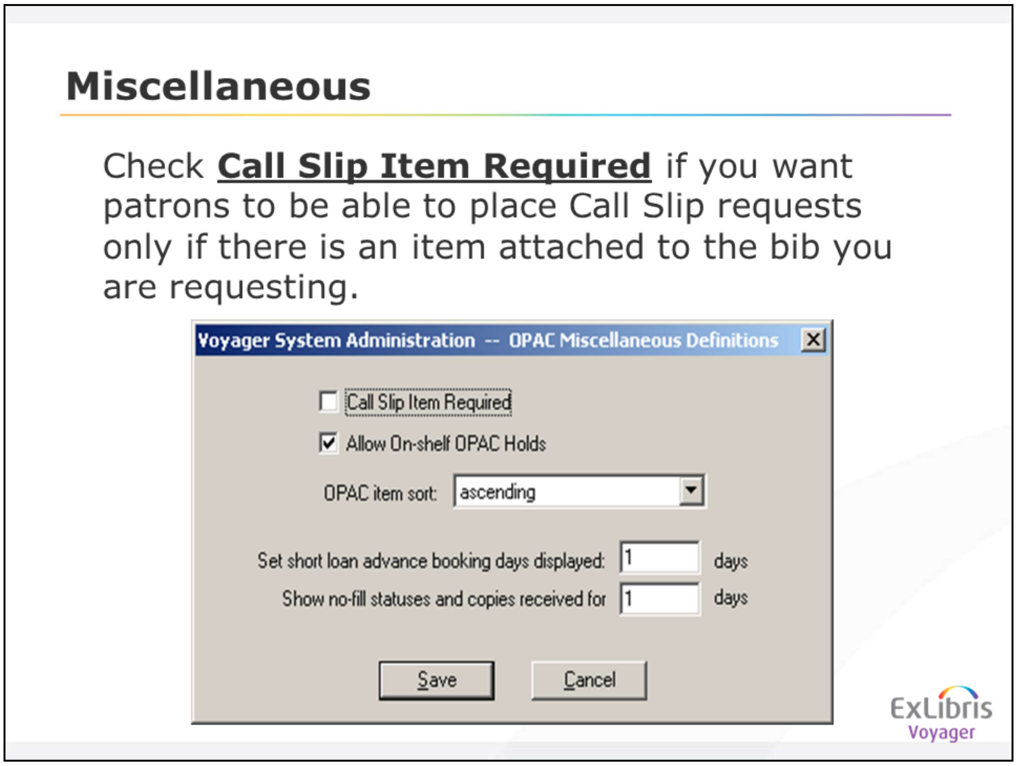


Two fields you will want to set on the Call Slip form are Form Name and Instructions. Because this is a System Level form, the code and type are already chosen for you, and are not editable.



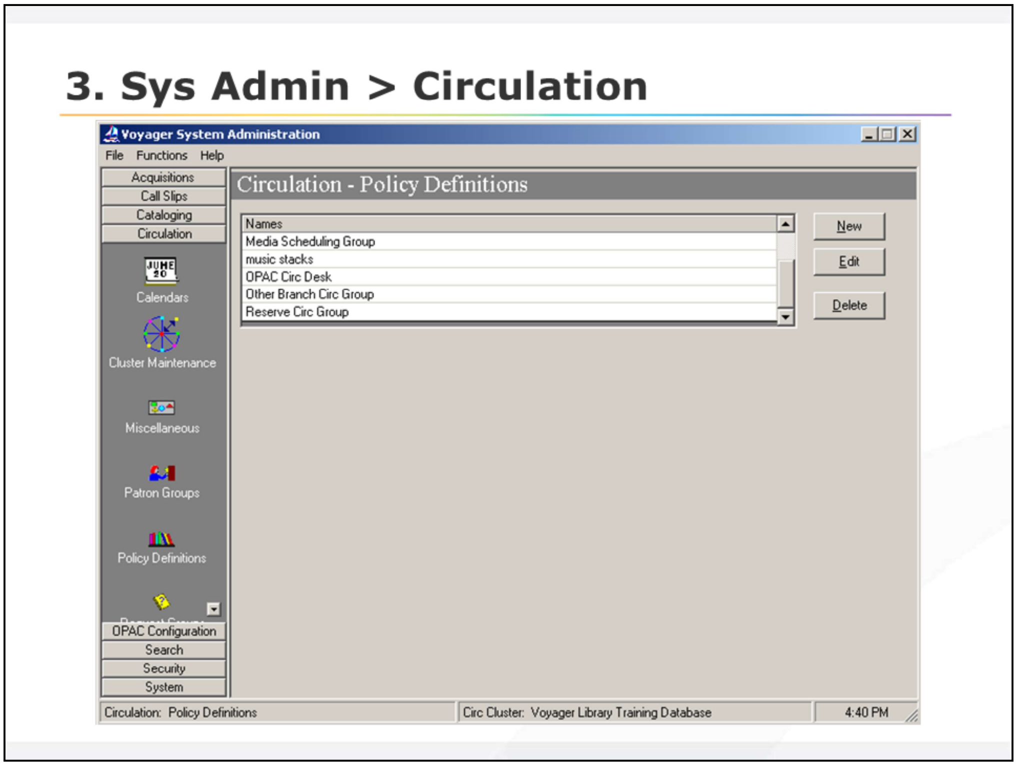
The Form Name you set in SisAd-min is the display name for the call slip form in Web Voyahge. Only Patron Groups enabled to place Call Slips will see this option.

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

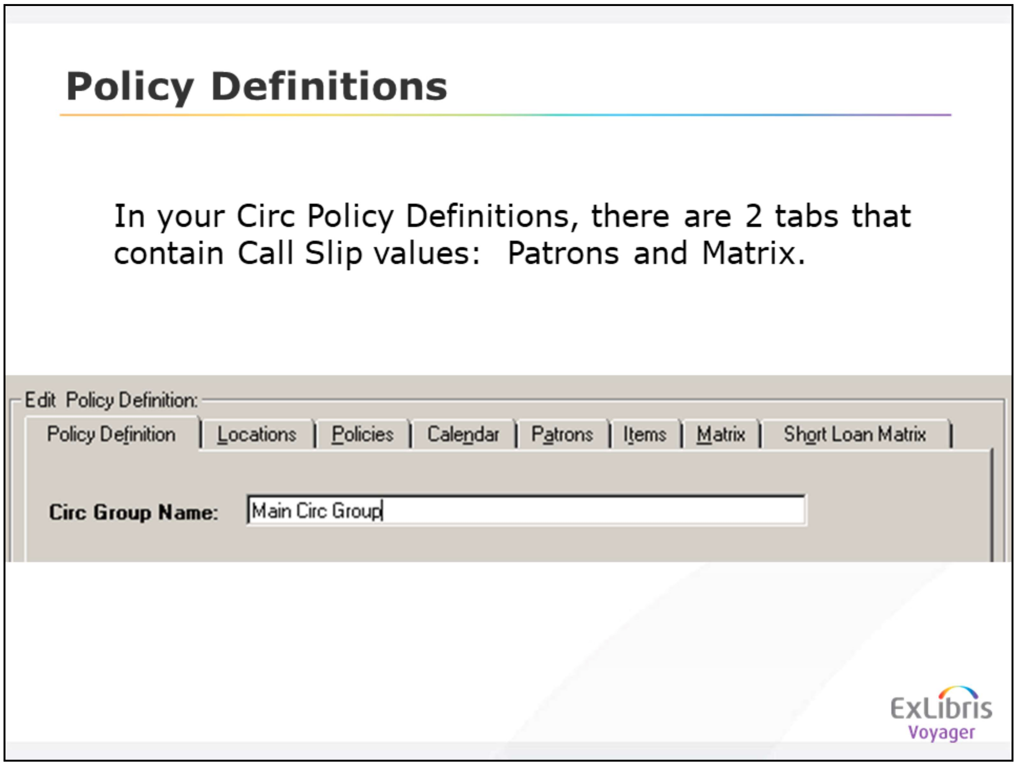


Does your site disallow call slips when the bib has no items?

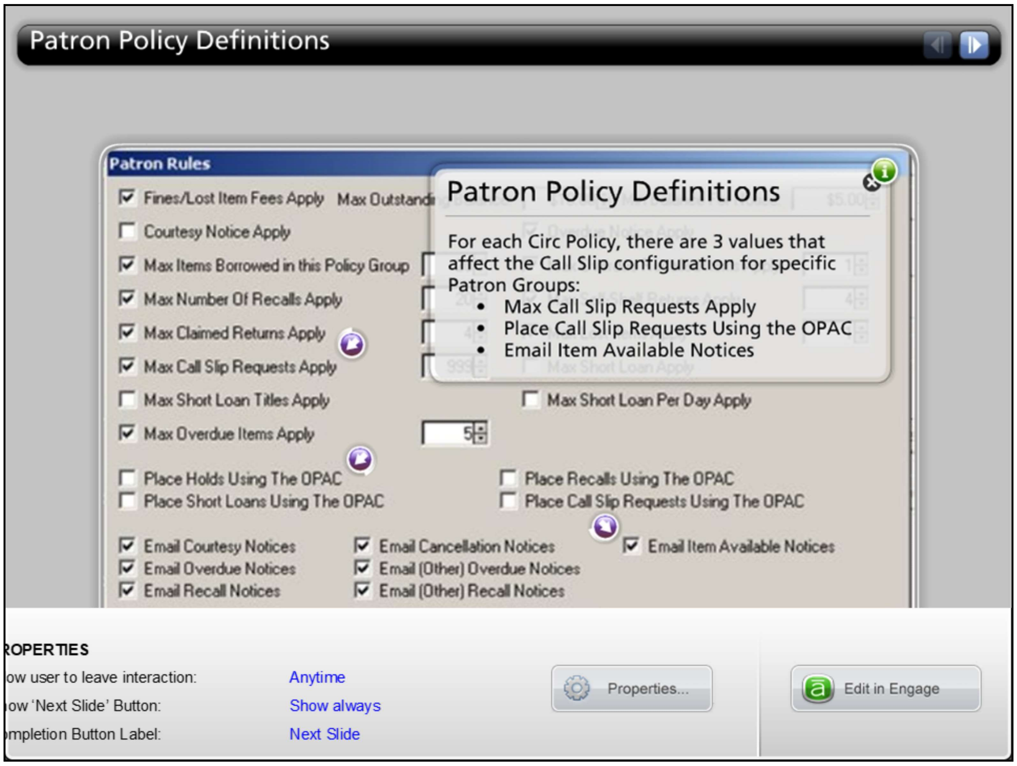
→ Check Call Slip Item Required.



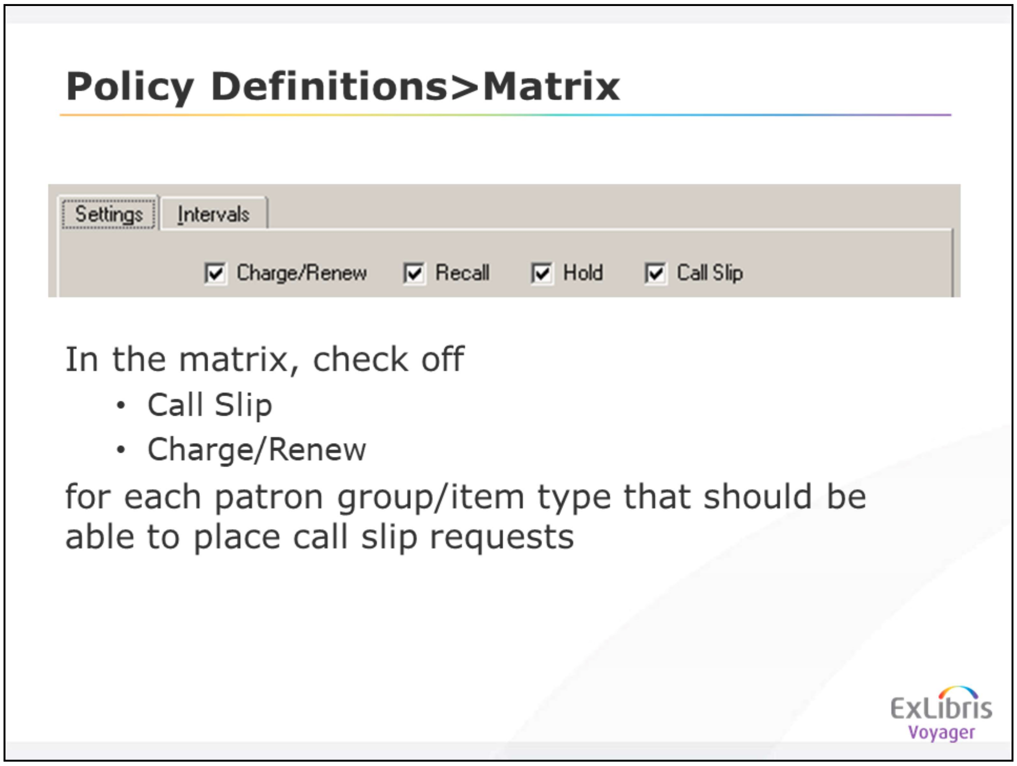
A number of other configuration options happen in the Circulation Policy Definitions section of SisAd-min. Here we determine what patron groups will be able to place call slip requests, and on which items.



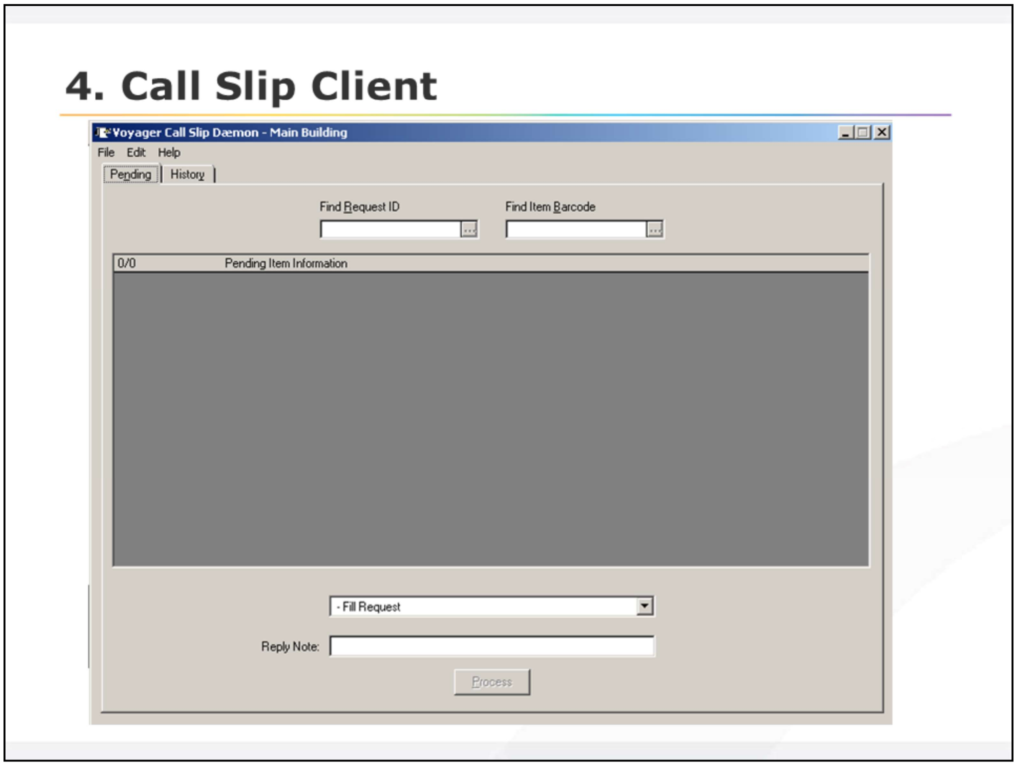
Let’s take a look at the policy definition window.
In your Circ Policy Definitions, there are 2 tabs that contain Call Slip values: Patrons and Matrix.



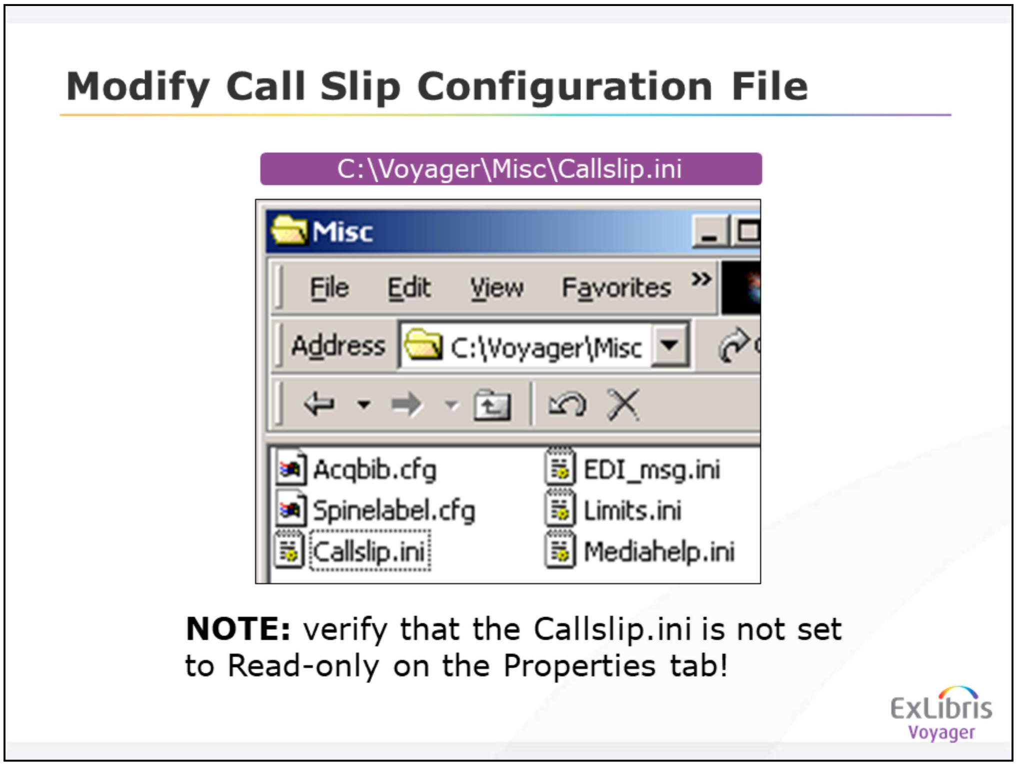
Patron Policy Definitions
Patron Rules
Fines/Lost Item Fees Apply
Courtesy Notice Apply
Max Items Borrowed in this Policy Group
Max Number Of Recalls Apply
Max Claimed Returns Apply
Max Call Slip Requests Apply
Max Short Loan Titles Apply
Max Short Loan Per Day Apply
Max Overdue Items Apply
Place Holds Using The OPAC
Place Short Loans Using The OPAC
Place Recalls Using The OPAC
Place Call Slip Requests Using The OPAC
Email Courtesy Notices
Email Overdue Notices
Email Recall Notices
Email Cancellation Notices
Email (Other) Overdue Notices
Email (Other) Recall Notices
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
ROPERTIES
ow user to leave interaction: Anytime
ow 'Next Slide' Button: Show always
mpletion Button Label: Next Slide
Properties...
Edit in Engage



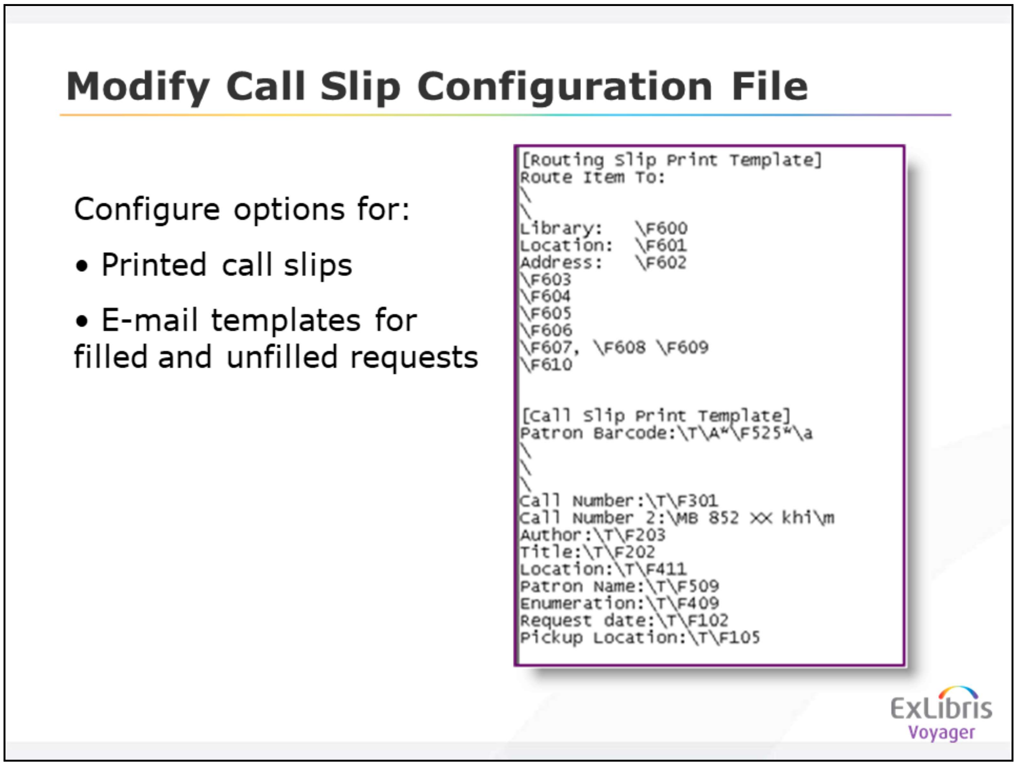
For Patron Groups that are allowed to initiate requests, ensure Call Slip and Charge or Renew are BOTH checked for the item types this Patron Group can request.



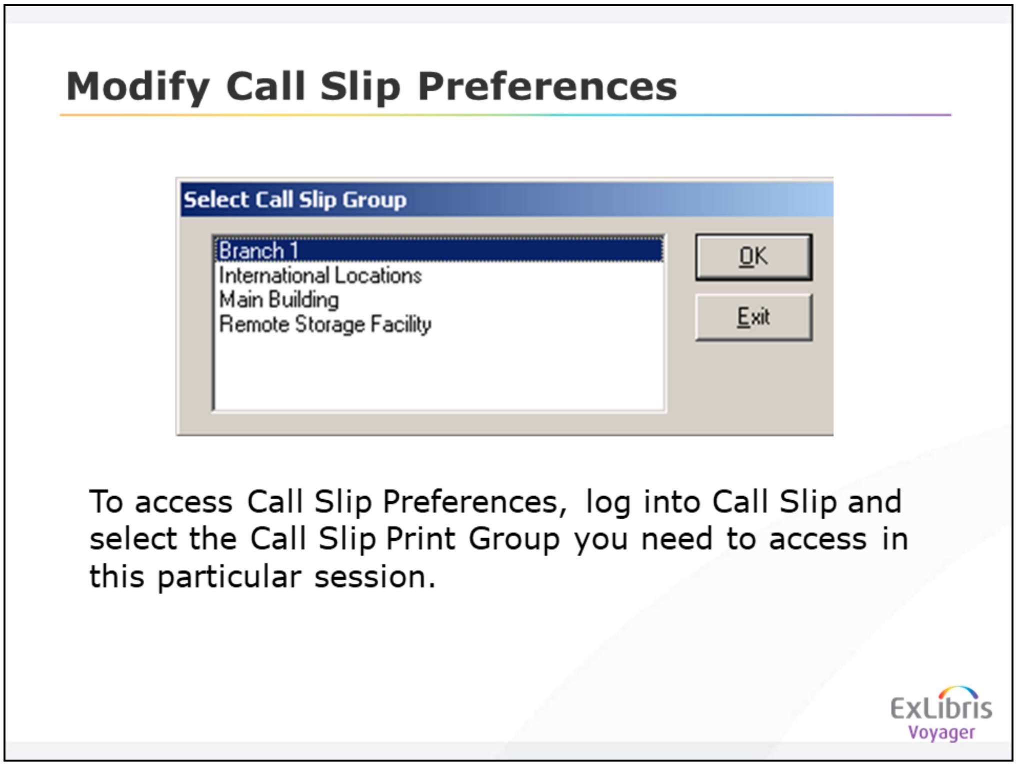
Finally, there are a few pieces that need to be set up in the Call Slip client itself, as well as the call slip configuration file, the Callslip.ini.



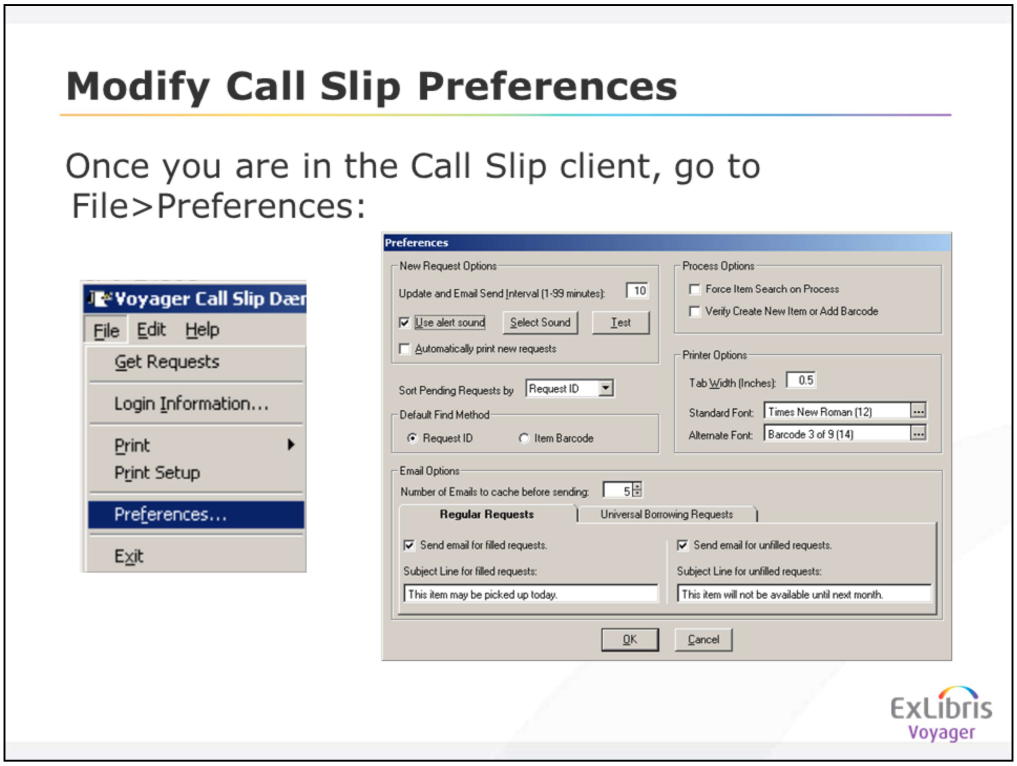
To get to your Callslip.ini, go to the Voyager folder where your clients live, and look for a folder called Misc. Inside is the Callslip.ini. Before making any changes to your Preferences in Call Slip, make sure that the Callslip.ini is not set to read only.



Modify 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.



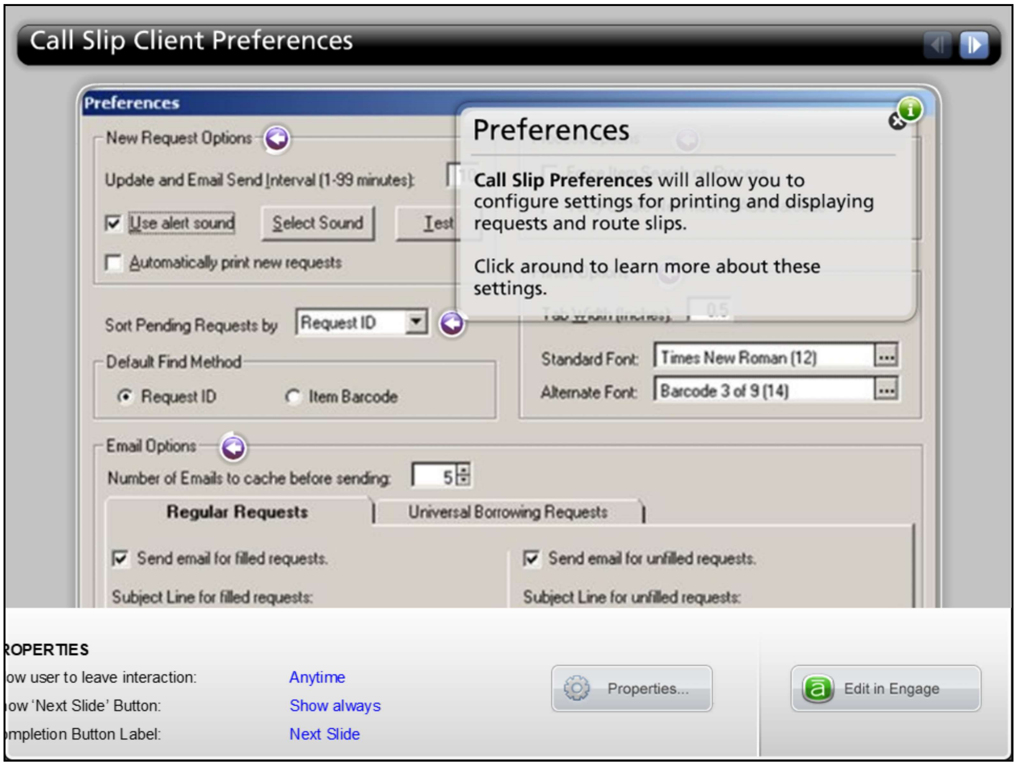
The last bit of setup is in the Call Slip clients Preferences. To access this, you will have to log into the Call Slip client. After providing your username and password, you will see this screen – this is where you specify which Call Slip Group or Queue you are logging into. Choose whichever groups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

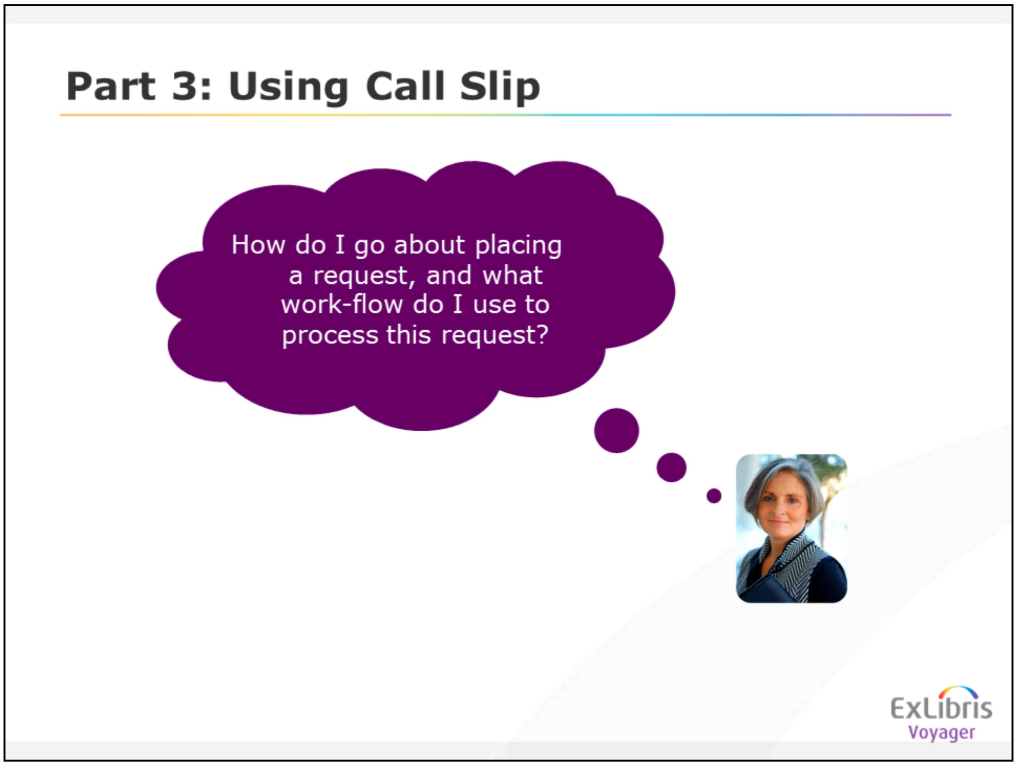


Once the Call Slip client is running, go to File>Preferences

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
Select Sound
Test
Automatically print new requests
Sort Pending Requests by
Request ID
Default Find Method
Request ID
Item Barcode
Standard Font:
Times New Roman (12)
Alternate Font:
Barcode 3 of 9 (14)
Email Options
Number of Emails to cache before sending:
5
Regular Requests
Universal Borrowing Requests
Send email for filled requests.
Send email for unfilled requests.
Subject Line for filled requests:
Subject Line for unfilled requests:
Preferences
Call Slip Preferences will allow you to configure settings for printing and displaying requests and route slips.
Click around to learn more about these settings.
ROPERTIES
ow user to leave interaction:
Anytime
ow 'Next Slide' Button:
Show always
mpletion Button Label:
Next Slide
Properties...
Edit in Engage

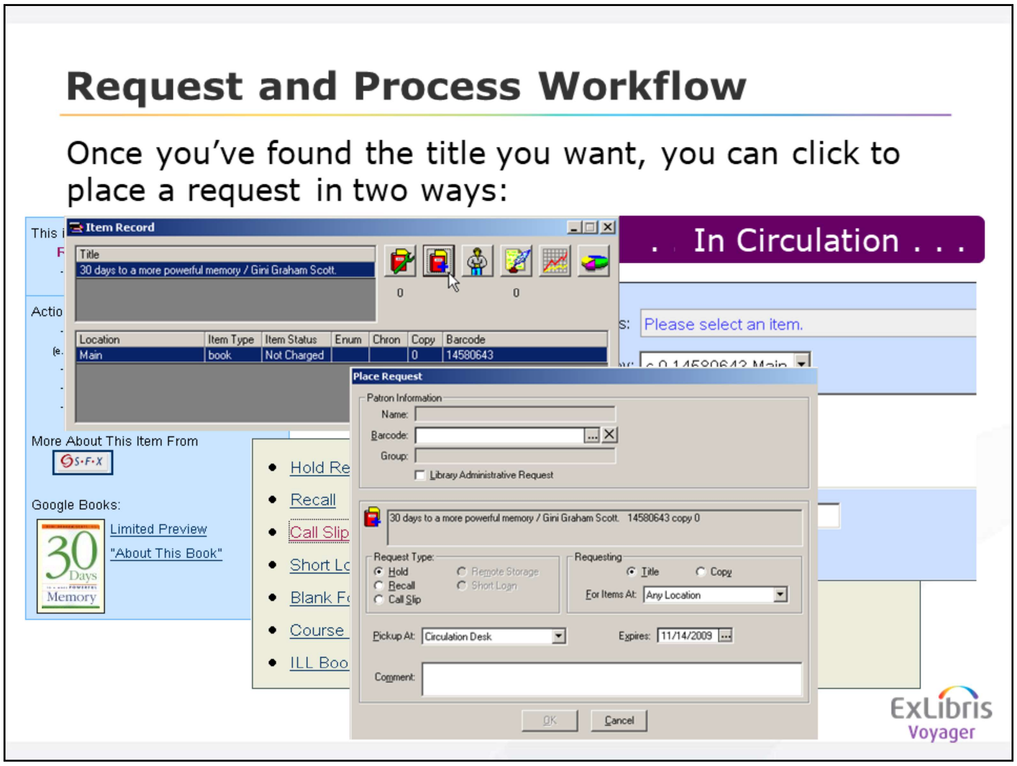


<another voice>

<end>

Part II: Placing Requests and Using Call Slip.

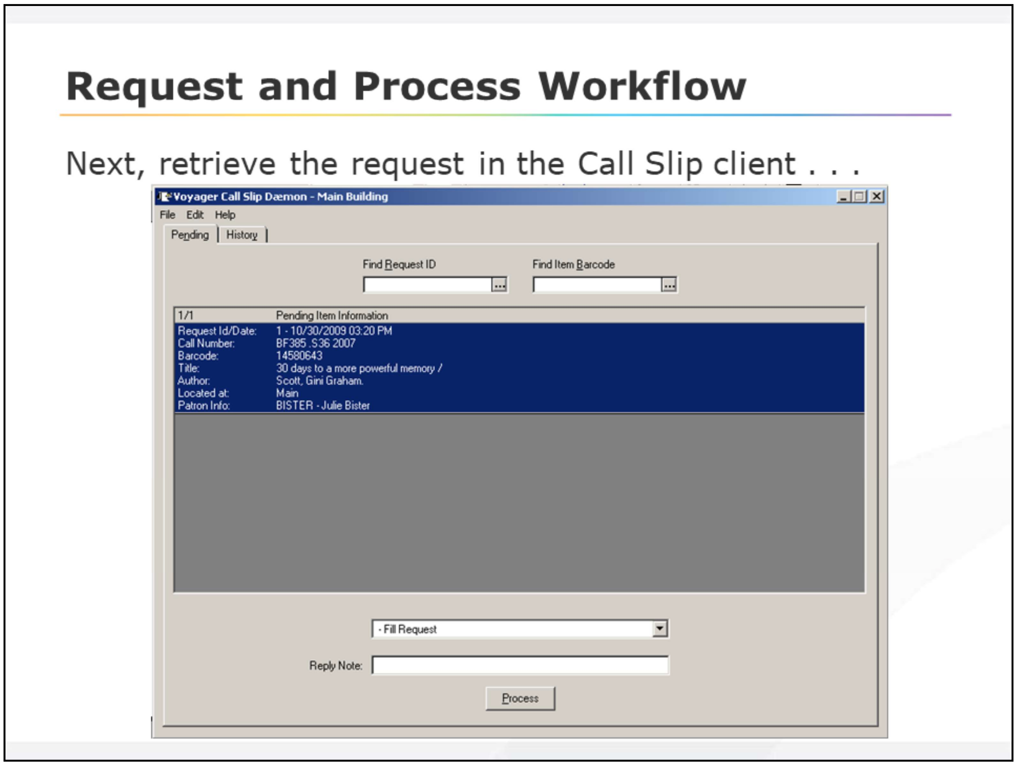
let us walk through the process step by step.



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 Voyahge.

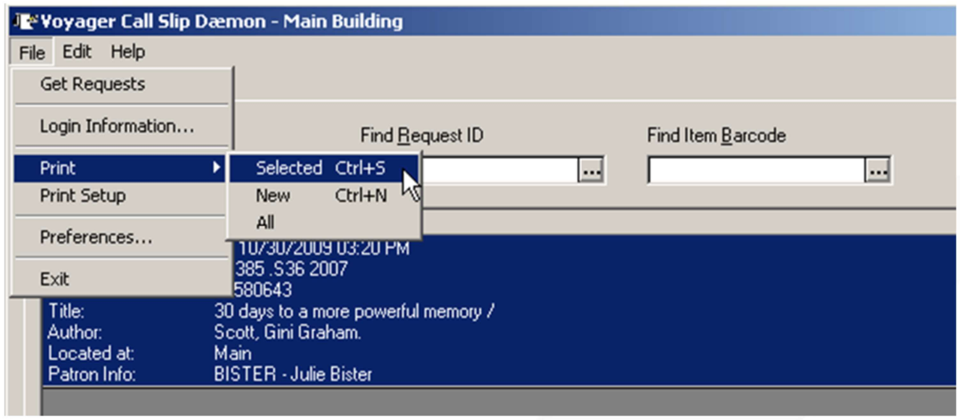
Of course, these options will depend on our previous set up in SisAd-min.



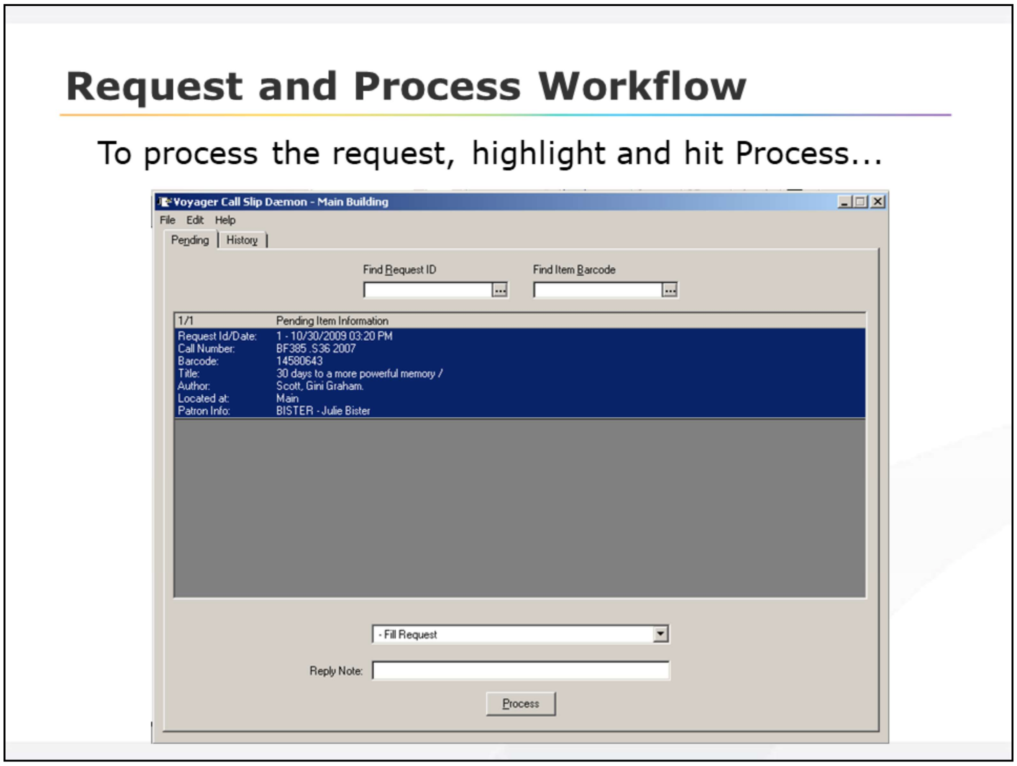
The next step is to open the Call Slip client to view the request you have placed.

Request and Process Workflow

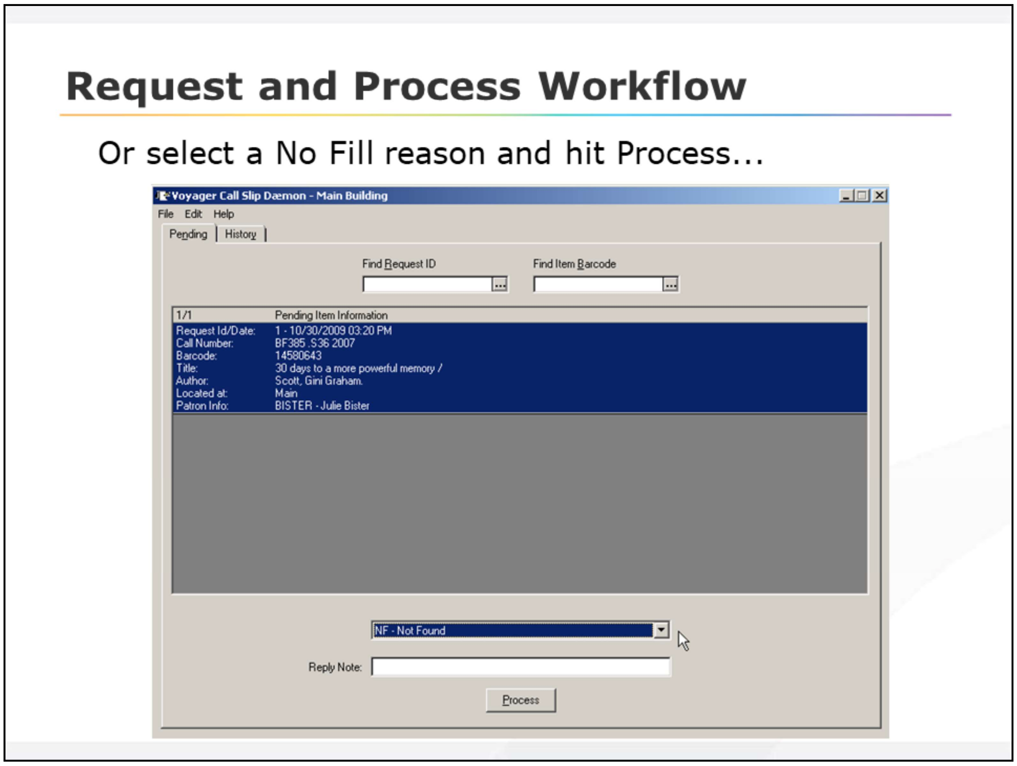
Print out the call slip so staff can retrieve the item from the shelves . . .



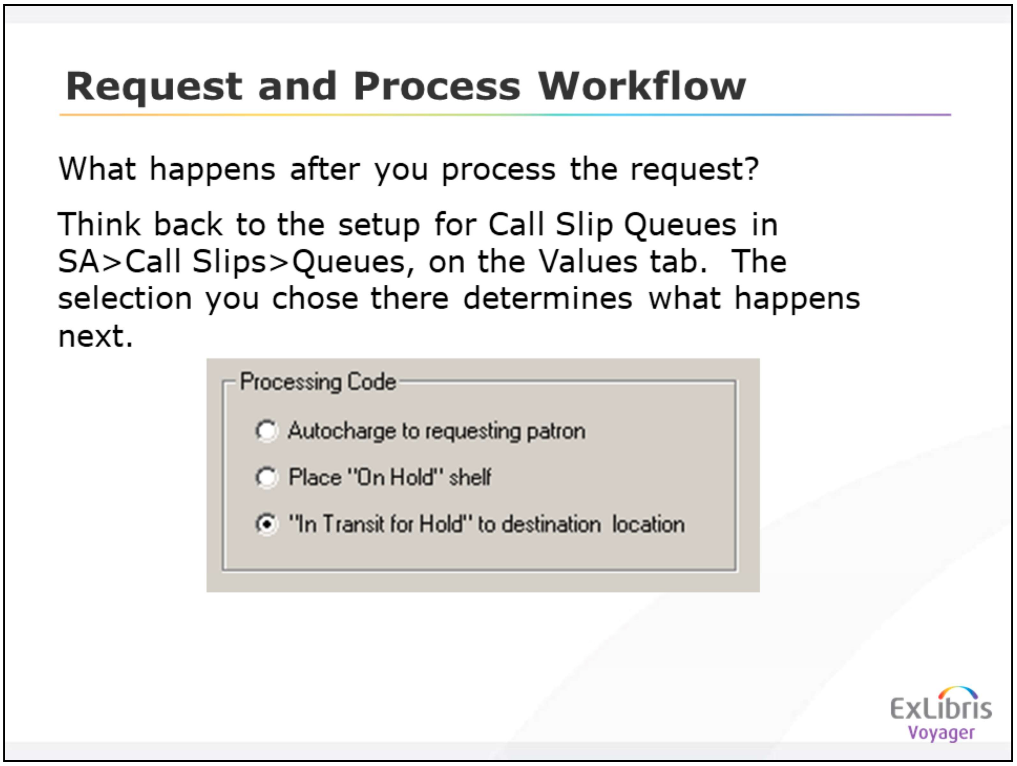
Now you will want staff to go retrieve the item so you can confirm you can process the request. You can either print the call slip from here on command, or may have already set up your preferences such that new requests auto-print when Call Slip sees them.



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



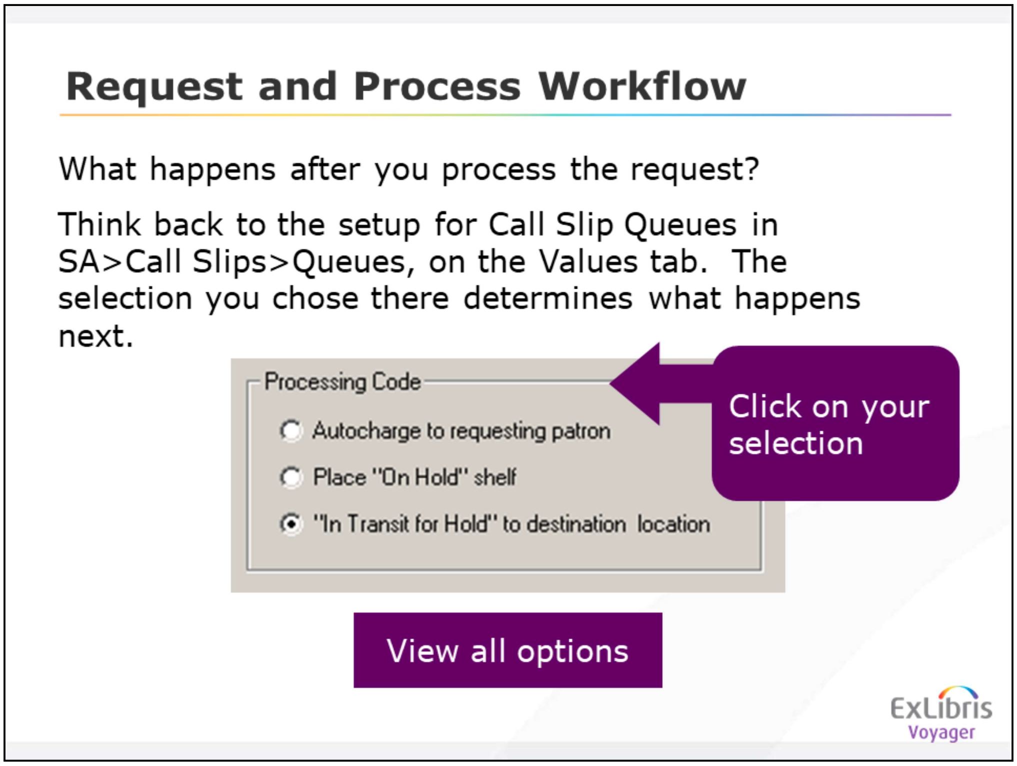
If you cannot fill the request for some reason, instead of leaving the dropdown at Fill, select the appropriate No Fill reason from the dropdown and then hit Process.



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.

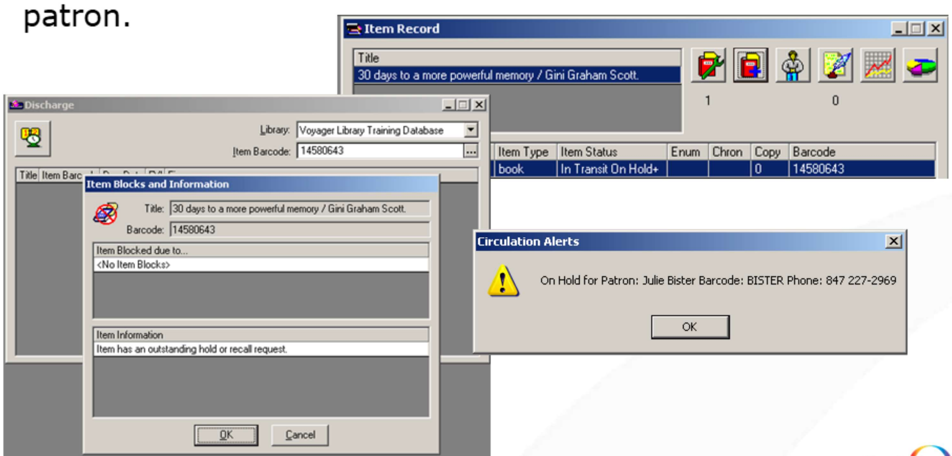
let us look at the three different possibilities!



<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.

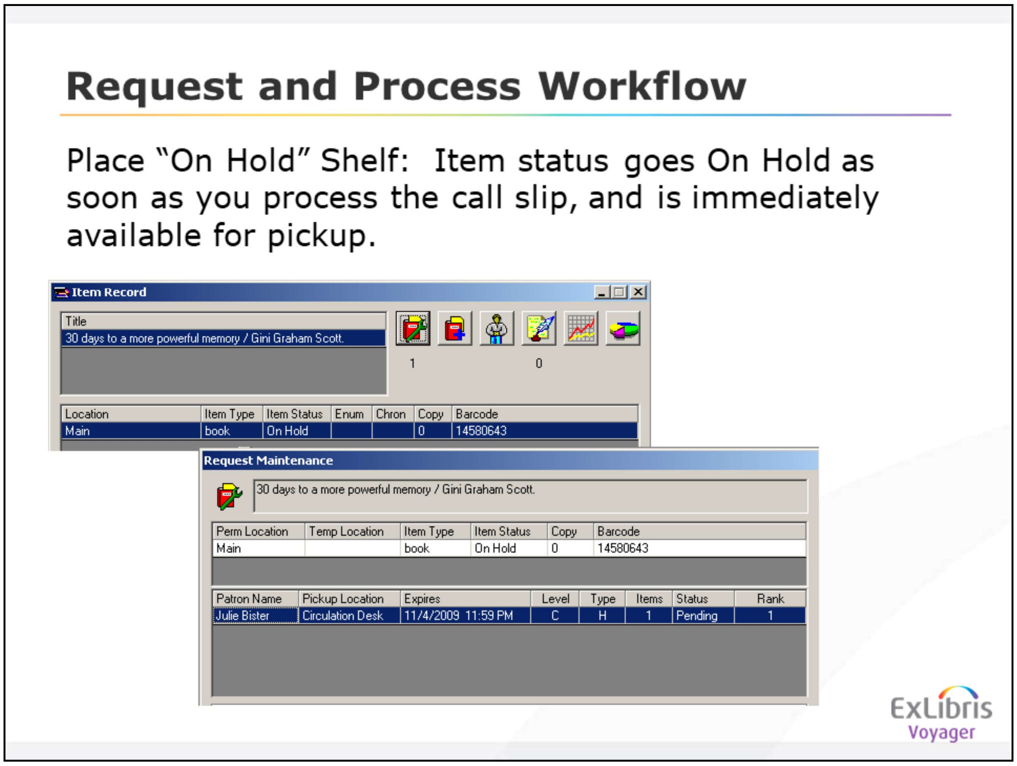
Request and Process Workflow

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.

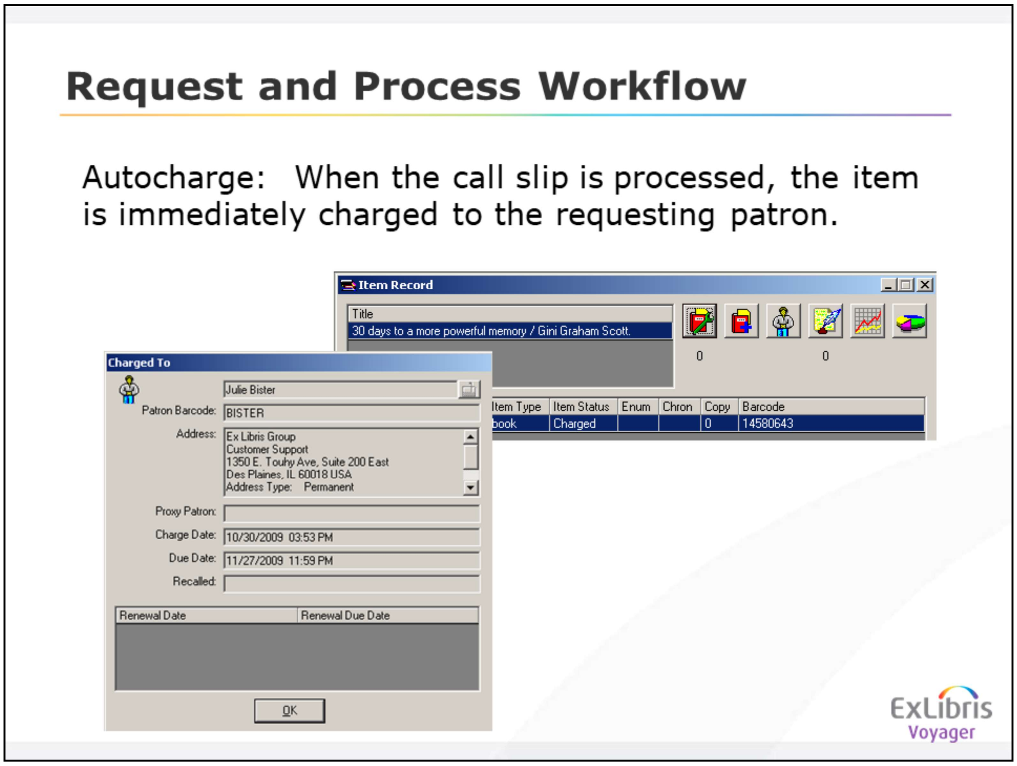


ExLibris Voyager

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.



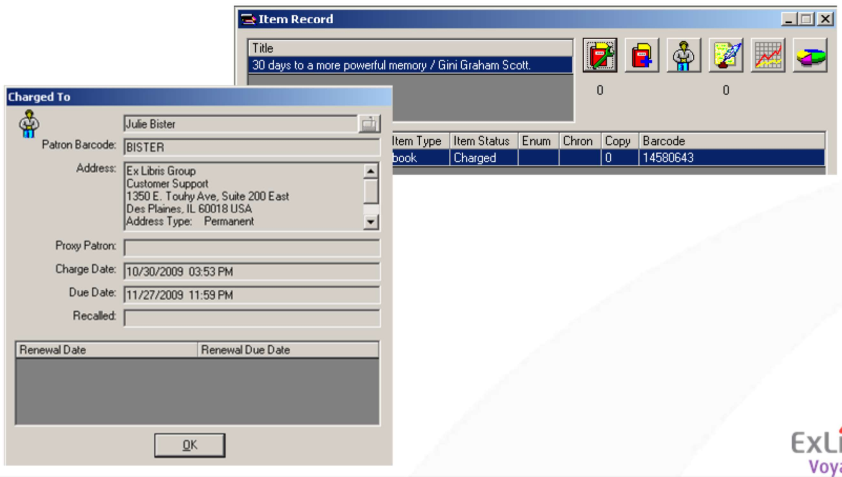
If you had "Place **On Hold** shelf"checked, as soon as you process the call slip, the item will be available to the patron for pick up. you do not have to go through the extra step of discharging the item.



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.



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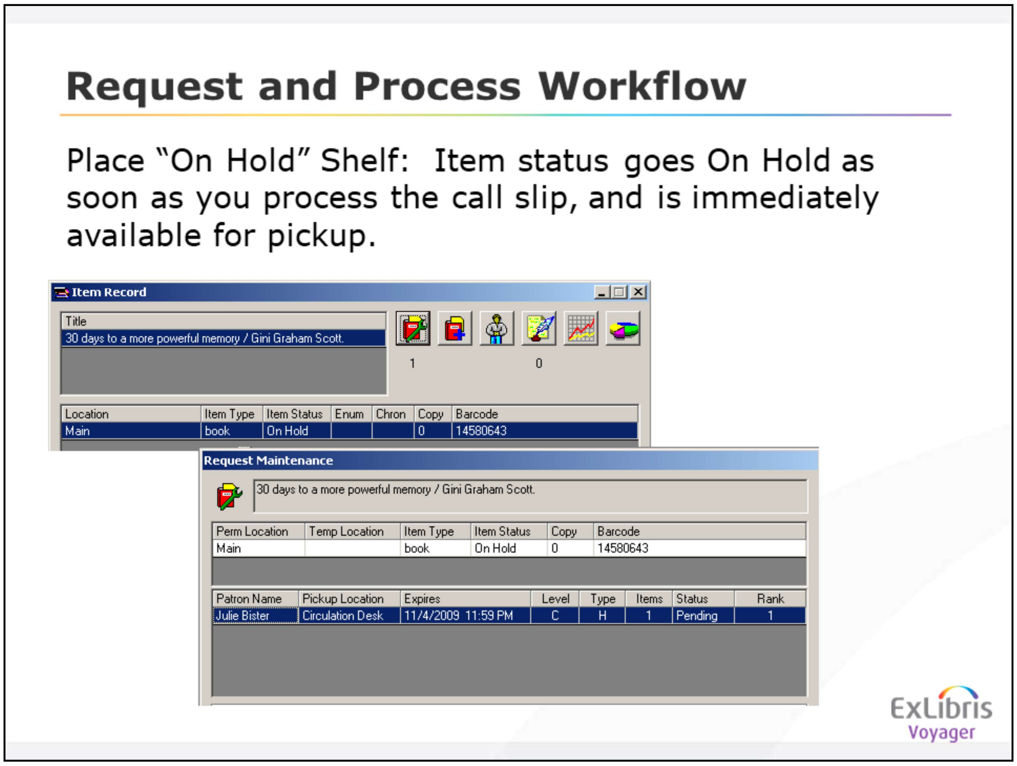

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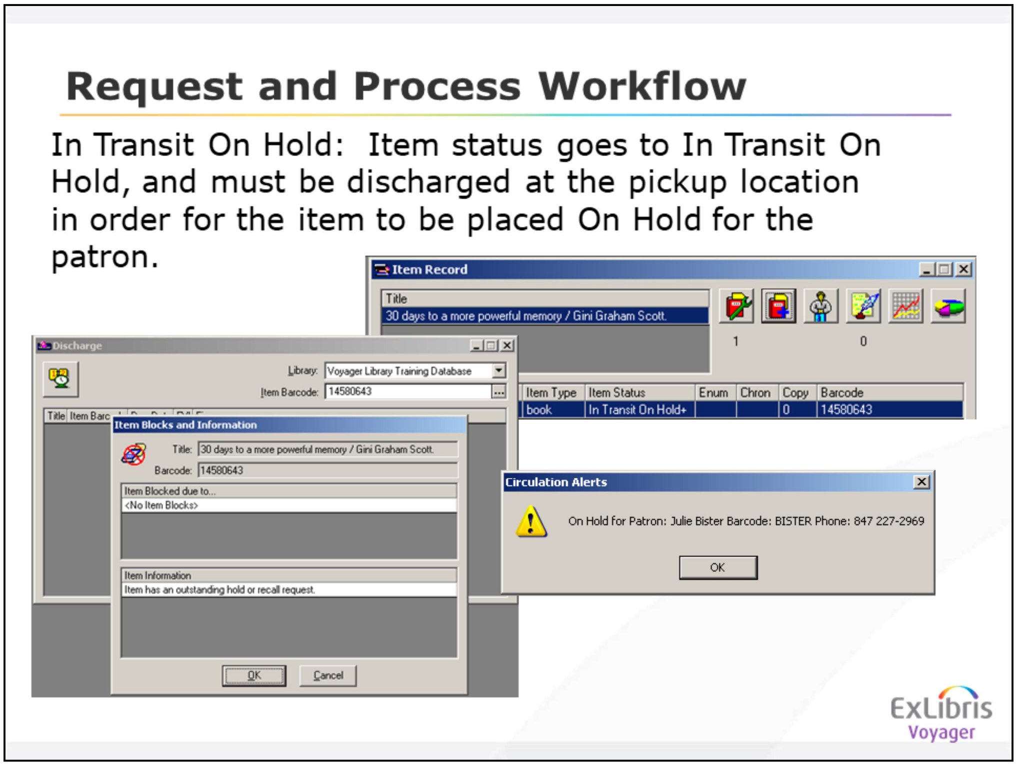

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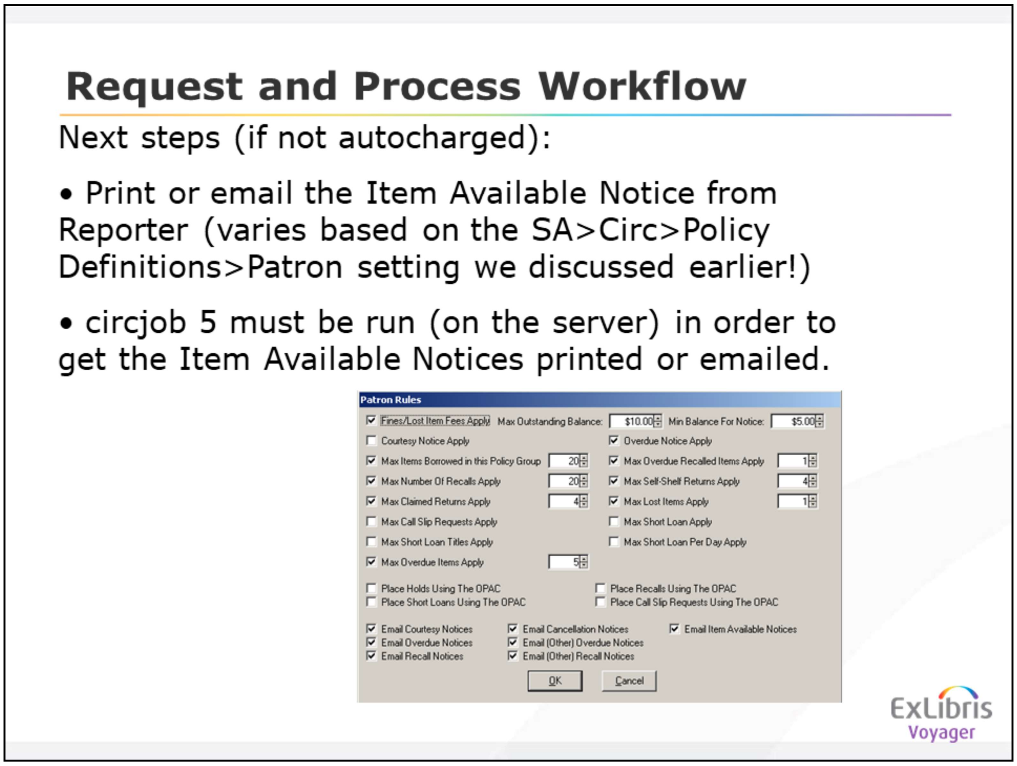
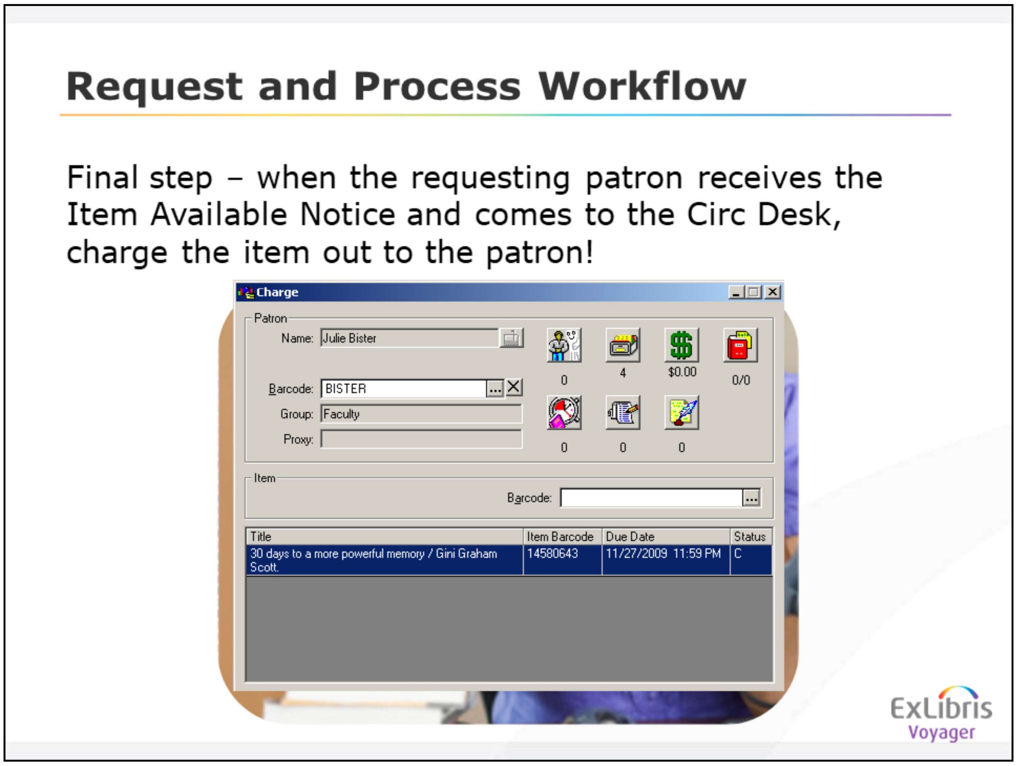


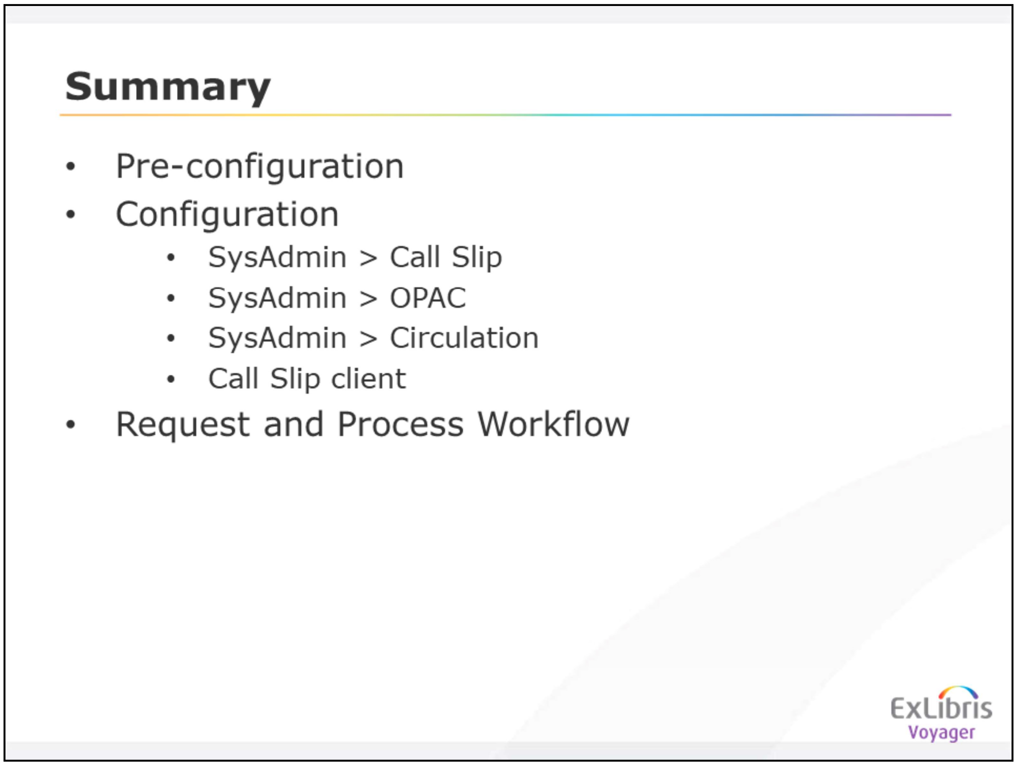
The Next steps are:

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.



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



<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.

We Hope you found this lesson helpful.

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

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