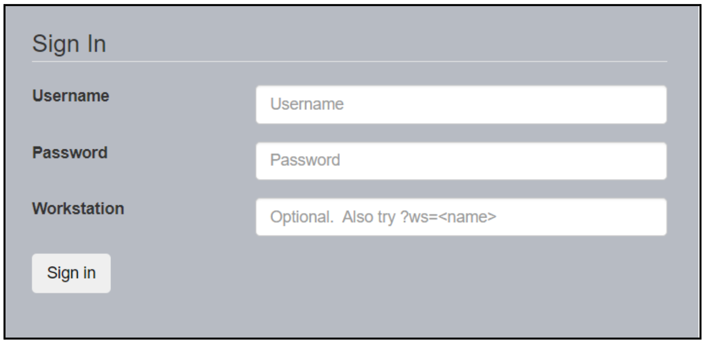
Fulfillment Staff Management Interfaces

Fulfillment provides a streamlined browser-based staff interface for library staff to move items through the ILL workflow. The stock location for this interface is https://<your-fulfillment-domain>/eg/ffstaff/. Staff with the appropriate permissions will be able to log in to place, edit, and manage requests. Permissions include STAFF_LOGIN, VIEW_CIRCULATIONS, and other appropriate holds and circulation permissions.

Enter a workstation to log in, if workstations are configured for your location. Certain functionality requires having a workstation configured. The log in screen is shown below:



When you log in, by default the **Pending Requests** → **Requests for My Patrons** interface will display. More information about that interface is below.

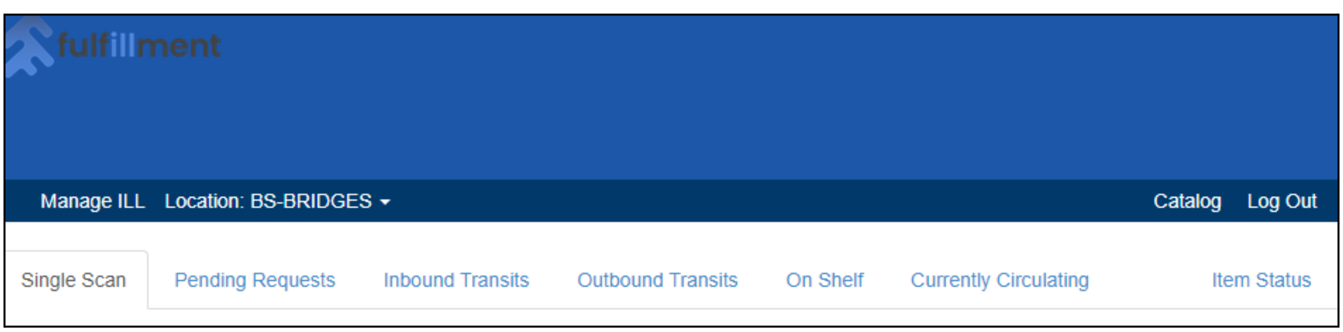
General Conventions

There are a few conventions followed within the Fulfillment staff interfaces.

- Occasionally, links will open in a new browser tab. Make sure your browser is configured to allow pop-ups from your Fulfillment URL.
- Columns are click-to-sort. Click once on the column header to sort ascending, and click again to sort descending.
- A hyperlinked request ID number will open a new browser tab with the catalog view of the record in question.
- A hyperlinked barcode number will open the request in the Item Status interface, and will show details of the request.
- Some interfaces permit actions to be taken on multiple requests at once. Check the box next to each request you want to include in the action.

Management Interface Overview

The ILL Management Interface contains a header bar as well as a tab ribbon.



On the header bar, you will see your current **Location** (BS-BRIDGES in the example). In most cases you will only be able to see a single location, but if you have access to multiple locations you can switch locations by clicking the down arrow next to the location name.

Also on the header bar are hyperlinks to the **Catalog**, which will open the searchable union catalog in a new browser tab; and a link to **Log Out**.

Below the header bar is a tab ribbon. The main tabs are:

- Single Scan
- Pending Requests
- Inbound Transits
- Outbound Transits
- On Shelf
- Currently Circulating
- Item Status

These tabs are described in greater detail below.

Single Scan

The first tab in the ILL Management Interface is **Single Scan**. When you log in to Fulfillment, you will be taken to this tab by default. This tab presents a single scan box for barcode entry which will prompt for the next logical action to be taken with the item in hand. If more than one action can be taken, those options will be presented as a separate set of buttons.

Capturing requests via the single scan interface will allow items adjacent to the targeted barcode to also fill a request. If library staff can't find the precise targeted copy, another copy on the same metarecord will be able to fill the request.

In the event of a barcode collision, the staff user will see a modal with item details and action options for each barcode in order to choose the correct item & actions.

It is strongly recommended that the Single Scan tab be used for all request-related actions, and that the other interface tabs be treated as informational tabs.

Single Scan Sending

Scan your item in the entry box. You shouldn't need to click go if you are using a barcode scanner. If you are using keyboard entry, type the barcode and click **Go**.

FulfILLment will retrieve the loan information for your item. If the loan is for a patron at a Connector library, you will see the patron name and barcode. Loans for non-Connector libraries will show the proxy name and barcode.

For this item, the next action is **Capture Outgoing ILL** and this action is focused. Alternative actions for this request can be seen in the lower right and include Retarget Request, Capture Item, and Print Details.

Click **Capture Outgoing ILL**, or simply press the enter key or spacebar key to complete the focused action.

The screen will update to show the item being placed in transit.

Single Scan Receiving

To receive requests, use the same Single Scan tab and scan or type your barcode in the entry box.

FulfILLment will retrieve the loan information. If the loan is for a patron at a Connector library, you will see the patron name and barcode. Loans for non-Connector libraries will show the proxy name and barcode.

In this example, **Capture Incoming ILL** is the default action. Alternative actions include Abort Transit, Cancel Request, Receive Item, Retarget Request, and Print Details.

Click **Capture Incoming ILL**, or simply press the enter key or spacebar key to complete the focused action.

For Connector-enabled libraries, the Capture action will send a command to the local ILS and place the item on the Holds Shelf for the patron.

The screen will update to show that the item is on the Holds Shelf, and change the next default action to **Checkout ILL**. Click **Checkout ILL** or simply press the enter key or spacebar key to complete the focused action.

For Connector-enabled libraries, the Checkout action will send a command to the local ILS to check the item out to the patron in the ILS.

Single Scan Returning

To return loans, use the same Single Scan tab and scan or type your barcode in the entry box.

FulfILLment will retrieve the loan information. In this example, **Checkin ILL** is the default action. Alternative actions include Mark Lost, Check In, and Print Details.

Click **Checkin ILL**, or simply press the enter key or spacebar key to complete the focused action.

For Connector-enabled libraries, the Checkin action will send a command to the local ILS to check the item in and clear it off of the patron's local ILS account.

The screen will update to show that the item is in transit back to its owning library.

Single Scan Receiving Returned Loan

To receive a returned loan, use the same Single Scan tab and scan or type your barcode in the entry box.

FulfILLment will retrieve the loan information. **Receive Returning ILL** is the default action. Alternative actions include Abort Transit, Receive Item, and Print Details.

Click **Receive Returning ILL**, or simply press the enter key or spacebar key to complete the focused action.

The screen will update to show that the item is now in reshelving and the transaction is closed.

Single Scan: Alternate Barcode Capture

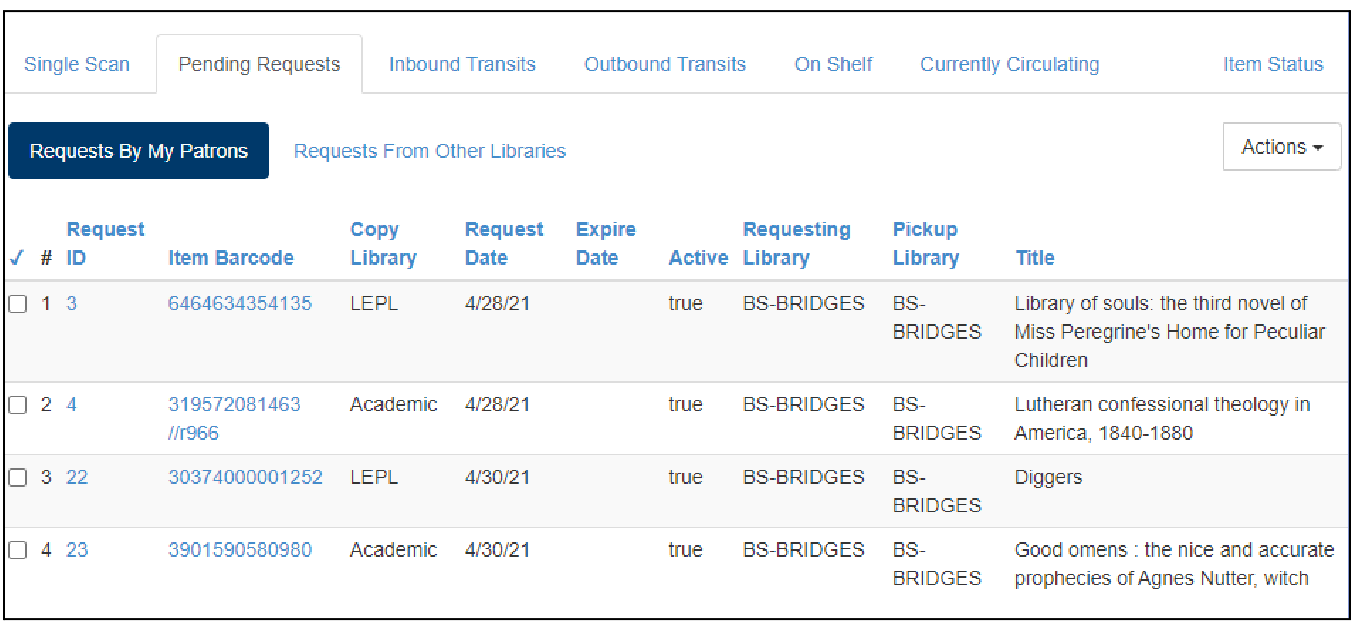
If library staff cannot find the specific copy listed on the Pull List, but can find another copy of that title, staff can use the Single Scan interface to scan the alternate copy as long as the alternate copy is part of the same record grouping. The alternate copy will be available for capture, and following its capture it will show as in transit to the borrowing library.

From that point, the rest of the ILL process follows the steps noted above.

Pending Requests

The Pending Requests tab includes sub-tabs **Requests by My Patrons** and **Requests From Other Libraries**. The Requests From Other Libraries tab also includes the **Printable Pull List**.

Requests by My Patrons



✓	#	Request ID	Item Barcode	Copy Library	Request Date	Expire Date	Active	Requesting Library	Pickup Library	Title
☐	1	3	6464634354135	LEPL	4/28/21		true	BS-BRIDGES	BS-BRIDGES	Library of souls: the third novel of Miss Peregrine's Home for Peculiar Children
☐	2	4	319572081463 //r966	Academic	4/28/21		true	BS-BRIDGES	BS-BRIDGES	Lutheran confessional theology in America, 1840-1880
☐	3	22	30374000001252	LEPL	4/30/21		true	BS-BRIDGES	BS-BRIDGES	Diggers
☐	4	23	3901590580980	Academic	4/30/21		true	BS-BRIDGES	BS-BRIDGES	Good omens : the nice and accurate prophecies of Agnes Nutter, witch

This displays a grid showing current requests for patrons of your library (and any parent/child libraries in your hierarchy). By default this grid is ordered by Request ID (ascending), but you can re-sort the grid by clicking on any of the column headers.

Clicking on a hyperlinked Request ID will open a new browser tab
and display the target metarecord for the request. Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request.

Actions are available from this interface, but it is recommended that you process request actions from the **Single Scan** interface described above.

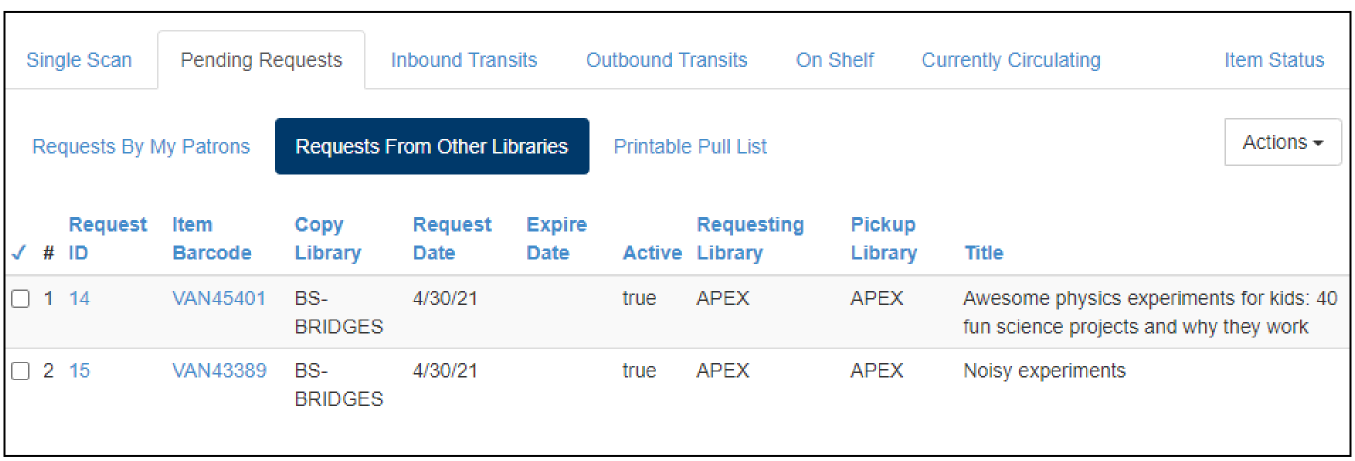
To perform actions from the Requests for My Patrons tab, select the checkbox(es) of the item(s) you wish to perform an action on. Click the checkmark at the upper left of the grid to select all visible items.

Click the **Actions** menu in the upper right corner and select your desired action.

Available actions are:

- **Retarget Request** - this will attempt to find another item to fill the request.
- **Activate Request** - this will activate a previously suspended request, or activate a request that started in a suspended state due to configuration
- **Suspend Request** - this will suspend an active request. The request will remain suspended until it is activated.
- **Cancel Request** - this will cancel a request. If a request is cancelled from the Pending Requests tab, no further action is needed.
- **Print** - this will print details of the request. Note that if you choose the print action for multiple requests, you will be presented with a print preview separately for each request.

Requests from Other Libraries



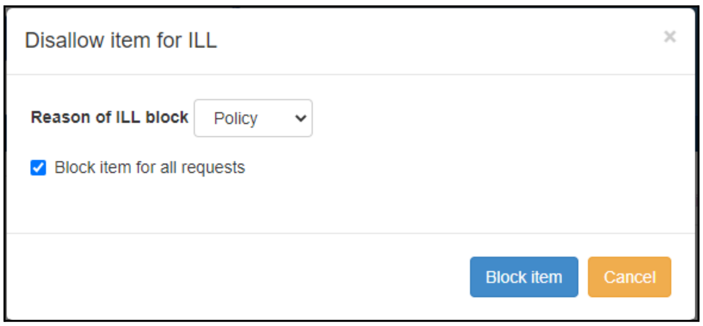
✓	#	Request ID	Item Barcode	Copy Library	Request Date	Expire Date	Active	Requesting Library	Pickup Library	Title
☐	1	14	VAN45401	BS-BRIDGES	4/30/21		true	APEX	APEX	Awesome physics experiments for kids: 40 fun science projects and why they work
☐	2	15	VAN43389	BS-BRIDGES	4/30/21		true	APEX	APEX	Noisy experiments

This tab will show you requests for your items that have come in from other libraries. By default this grid is ordered by Request ID (ascending), but you can re-sort the grid by clicking on any of the column headers.

Clicking on a hyperlinked Request ID will open a new browser tab and display the target metarecord for the request. Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request.

Available actions are:

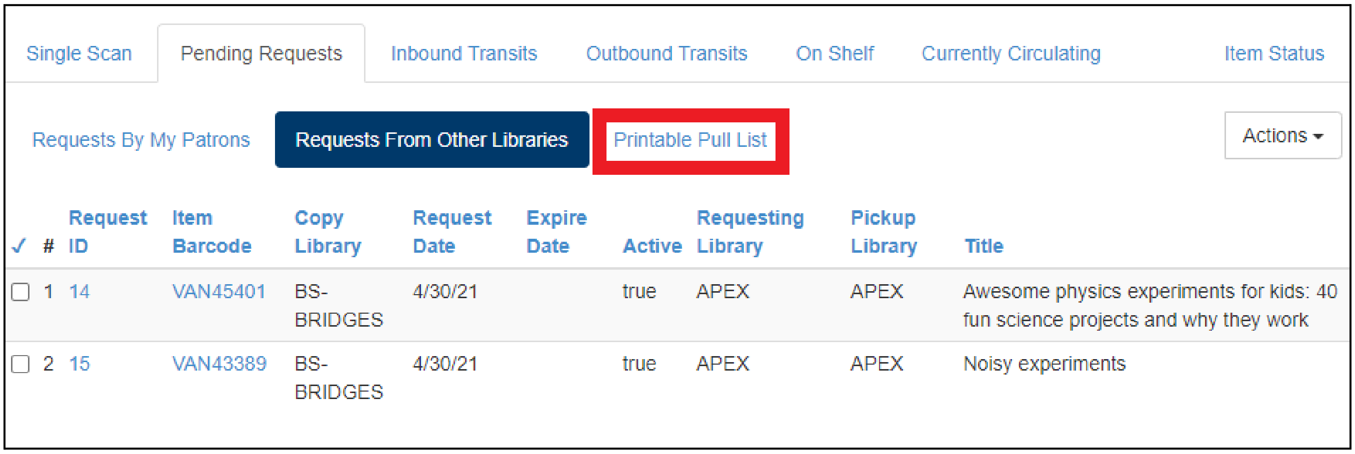
- **Capture Item** - this will capture the item for loan and place it in transit to the borrowing library.
- **Printable Pull List** - this will open a new browser tab with a printable pull list of your items that have been requested. More information on the pull list is below.
- **Retarget Request** - this will attempt to find another item to fill the request.
- **Activate Request** - this will activate a previously suspended request, or activate a request that started in a suspended state due to configuration
- **Suspend Request** - this will suspend an active request. The request will remain suspended until it is activated.
- **Disallow Item for Requests** - this action will remove a specific barcode from being eligible for ILL lending, either temporarily or permanently. If you select this, you will see a modal with a list of reasons and a checkbox labelled “Block item for all requests.”



    - Select a reason for your block. Reasons for an ILL block include:
        - Policy
        - Targeted Copy or Equivalent Not Found
        - Incorrectly Targeted or Incorrect Copy
        - Other Reasons
    - If you only want to block this specific ILL request, but allow the item to be retargeted in the future, make sure the **Block item for all requests** checkbox is unchecked. If you wish to permanently block an item from being targeted for ILL requests, check the **Block item for all requests** checkbox.
    - Once you have selected your reason and appropriate checkbox value, click **Block Item**. If you wish to exit without making any changes, click **Cancel**.
    - Note that if, in the future, you wish to reallow an item from requests, you can make this change from the Item Status interface. This is described in detail below.
- **Print** - this will print details of the request. Note that if you choose the print action for multiple requests, you will be presented with a print preview separately for each request.

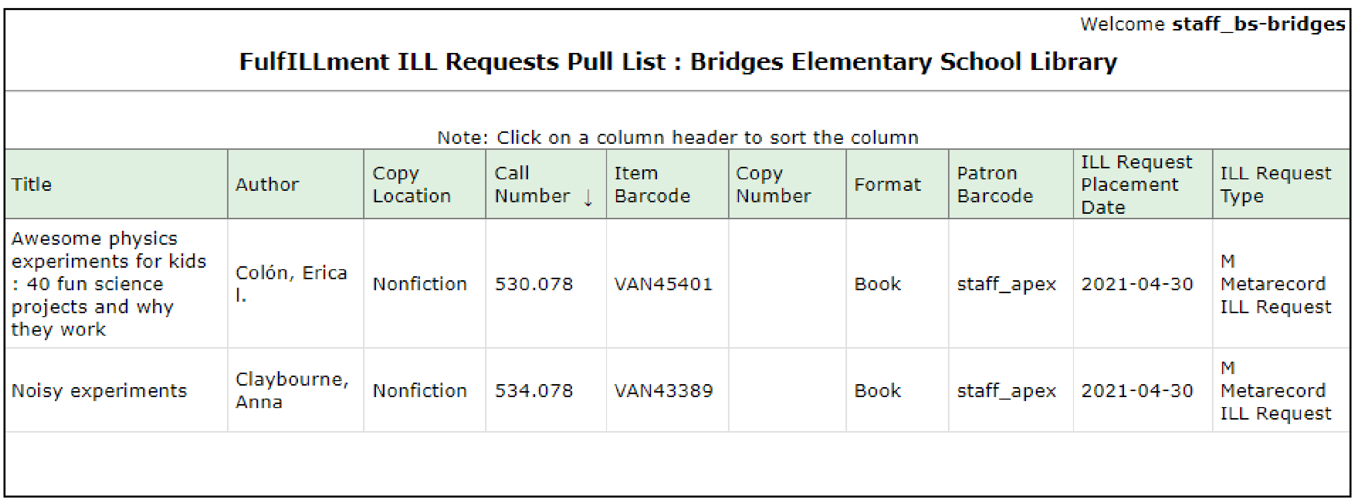
Pull List

Click the Printable Pull List button to generate a printable pull list with items requested from your library.



✓	#	Request ID	Item Barcode	Copy Library	Request Date	Expire Date	Active	Requesting Library	Pickup Library	Title
☐	1	14	VAN45401	BS-BRIDGES	4/30/21		true	APEX	APEX	Awesome physics experiments for kids: 40 fun science projects and why they work
☐	2	15	VAN43389	BS-BRIDGES	4/30/21		true	APEX	APEX	Noisy experiments

This will open in a new tab. By default this list will sort by Call Number (ascending). You can click column headers to change the sort.



Title	Author	Copy Location	Call Number ↓	Item Barcode	Copy Number	Format	Patron Barcode	ILL Request Placement Date	ILL Request Type
Awesome physics experiments for kids : 40 fun science projects and why they work	Colón, Erica I.	Nonfiction	530.078	VAN45401		Book	staff_apex	2021-04-30	M Metarecord ILL Request
Noisy experiments	Claybourne, Anna	Nonfiction	534.078	VAN43389		Book	staff_apex	2021-04-30	M Metarecord ILL Request

Inbound Transits

The **Inbound Transits** tab will show you transits coming into your library from other libraries. There are two subtabs, **ILLs For My Patrons** and **My Returns**.

ILLs for My Patrons

The **ILLs For My Patrons** subtab shows a grid of items that have been sent and are in route for your patrons. By default this grid is ordered by Transit ID (ascending), but you can re-sort the grid by clicking on any of the column headers.

Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request.

To perform actions from the ILLs for My Patrons tab, select the checkbox(es) of the item(s) you wish to perform an action on. Click the checkmark at the upper left of the grid to select all visible items.

Click the **Actions** menu in the upper right corner and select your desired action.

Available actions are:

- **Cancel Request** - this will cancel a request. Since the requested item is in transit to your library, you will still need to scan it in **Single Scan** in order to send the item on to its next request or back to its owning library.
- **Receive Item** - this will receive the item for your patron. While receiving is possible from this grid, we generally recommend that all sending and receiving actions be performed in **Single Scan**.
- **Print** - this will print details of the request. Note that if you choose the print action for multiple requests, you will be presented with a print preview separately for each request.

My Returns

The **My Returns** subtab shows a grid of items that have been lent to other libraries and are on their way back to your library. By default this grid is ordered by Transit ID (ascending), but you can re-sort the grid by clicking on any of the column headers.

Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request.

To perform actions from the My Returns tab, select the checkbox(es) of the item(s) you wish to perform an action on. Click the checkmark at the upper left of the grid to select all visible items.

Click the **Actions** menu in the upper right corner and select your desired action.

Available actions are:

- **Receive Item** - this will receive the item back at your library and close the ILL transaction. While receiving is possible from this grid, we generally recommend that all sending and receiving actions be performed in **Single Scan**.
- **Print** - this will print details of the request. Note that if you choose the print action for multiple requests, you will be presented with a print preview separately for each request.

Outbound Transits

The **Outbound Transits** tab will show you transits that have left your library and are on their way to another library. There are two subtabs, **ILLs to Other Libraries** and **Returns to Other Libraries**.

ILLs to Other Libraries

The **ILLs to Other Libraries** subtab shows a grid of items that have been lent to other libraries by you and are on their way to the borrowing library. By default this grid is ordered by Transit ID (ascending), but you can re-sort the grid by clicking on any of the column headers.

Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request.

To perform actions from the ILLs to Other Libraries tab, select the checkbox(es) of the item(s) you wish to perform an action on. Click the checkmark at the upper left of the grid to select all visible items.

Click the **Actions** menu in the upper right corner and select your desired action.

Available actions are:

- **Abort Transit** - this will cancel the item's transit. If you abort a transit, you will need to return to **Single Scan** to either re-capture the item for ILL or retarget the request to another item.
- **Disallow Item for Requests** - this action will remove a specific barcode from being eligible for ILL lending, either temporarily or permanently. If you select this, you will see a modal with a list of reasons and a checkbox labelled "Block item for all requests."
    - Select a reason for your block. Reasons for an ILL block include:
        - Policy
        - Targeted Copy or Equivalent Not Found
        - Incorrectly Targeted or Incorrect Copy
        - Other Reasons
    - If you only want to block this specific ILL request, but allow the item to be retargeted in the future, make sure the **Block item for all requests** checkbox is unchecked. If you wish to permanently block an item from being targeted for ILL requests, check the **Block item for all requests** checkbox.
    - Once you have selected your reason and appropriate checkbox value, click **Block Item**. If you wish to exit without making any changes, click **Cancel**.
    - Note that if, in the future, you wish to reallow an item from requests, you can make this change from the Item Status interface.
    - If you use Disallow Item for Requests from this interface, you will need to return to **Single Scan** to clear the item's canceled transit status and return it to reshelving.
- **Print** - this will print details of the request. Note that if you choose the print action for multiple requests, you will be presented with a print preview separately for each request.

Returns to Other Libraries

The **Returns to Other Libraries** subtab shows a grid of items that had been borrowed by your patron and are on their way back to their owning library. By default this grid is ordered by Transit ID (ascending), but you can re-sort the grid by clicking on any of the column headers.

Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request.

To perform actions from the Returns to Other Libraries tab, select the checkbox(es) of the item(s) you wish to perform an action on. Click the checkmark at the upper left of the grid to select all visible items.

Click the **Actions** menu in the upper right corner and select your desired action.

Available actions are:
- **Print** - this will print details of the request. Note that if you choose the print action for multiple requests, you will be presented with a print preview separately for each request.

On Shelf

The **On Shelf** tab will show you items currently on the holds shelf. Items on the holds shelf have been received at their pickup location and are ready for patron pickup. There are two subtabs, **For My Patrons** and **At Other Libraries.**

For My Patrons

The **For My Patrons** subtab shows a grid of items that have been borrowed by your patrons and are on the holds shelf and available for pickup. By default this grid is ordered by Request ID (ascending), but you can re-sort the grid by clicking on any of the column headers.

Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request. Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request.

To perform actions from the For My Patrons tab, select the checkbox(es) of the item(s) you wish to perform an action on. Click the checkmark at the upper left of the grid to select all visible items.

Click the **Actions** menu in the upper right corner and select your desired action.

Available actions are:
- **Check Out** - this will check out the ILL to the patron for which it is on hold. While checking out is possible from this grid, we generally recommend that all sending and receiving actions be performed in **Single Scan**.
- **Print** - this will print details of the request. Note that if you choose the print action for multiple requests, you will be presented with a print preview separately for each request.

At Other Libraries

The **At Other Libraries** subtab shows a grid of items that have been loaned by your library and are on the holds shelf and available for pickup for other libraries' patrons. By default this grid is ordered by Request ID (ascending), but you can re-sort the grid by clicking on any of the column headers.

Clicking on a hyperlinked Item Barcode will open the request in
the Item Status interface, and will show details of the request. Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request.

To perform actions from the At Other Libraries tab, select the checkbox(es) of the item(s) you wish to perform an action on. Click the checkmark at the upper left of the grid to select all visible items.

Click the **Actions** menu in the upper right corner and select your desired action.

Available actions are:

- **Check Out** - this will check out the ILL to the patron for which it is on hold. While checking out is possible from this grid, we generally recommend that all sending and receiving actions be performed in **Single Scan**. Note that this Action will be removed from this grid in a future release.
- **Print** - this will print details of the request. Note that if you choose the print action for multiple requests, you will be presented with a print preview separately for each request.

Currently Circulating

The **Currently Circulating** tab will show you items currently checked out in Fulfillment. There are two subtabs, **To My Patrons** and **To Other Libraries.**

To My Patrons

The **To My Patrons** subtab shows a grid of items that have been borrowed by your patrons and are currently checked out in Fulfillment. By default this grid is ordered by Request ID (ascending), but you can re-sort the grid by clicking on any of the column headers.

Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request.

To perform actions from the To My Patrons tab, select the checkbox(es) of the item(s) you wish to perform an action on. Click the checkmark at the upper left of the grid to select all visible items.

Click the **Actions** menu in the upper right corner and select your desired action.

Available actions are:

- **Check In** - this will check in the ILL and initiate a transit to the next library on the request list, or a transit back to the home library if there are no additional requests. While checking in is possible from this grid, we generally recommend that all sending and receiving actions be performed in **Single Scan**.
- **Mark Lost** - this will mark the ILL as lost by the patron. If configured, this will send a notice to the lending library.
- **Print** - this will print details of the request. Note that if you choose the print action for multiple requests, you will be presented with a print preview separately for each request.

To Other Libraries

The **To Other Libraries** subtab shows a grid of items that have been lent by your library and are currently checked out in Fulfillment to their borrowing patrons. By default this grid is ordered by Request ID (ascending), but you can re-sort the grid by clicking on any of the column headers.

Clicking on a hyperlinked Item Barcode will open the request in the Item Status interface, and will show details of the request.

To perform actions from the To My Patrons tab, select the checkbox(es) of the item(s) you wish to perform an action on. Click the checkmark at the upper left of the grid to select all visible items.

Click the **Actions** menu in the upper right corner and select your desired action.

Available actions are:

- **Print** - this will print details of the request. Note that if you choose the print action for multiple requests, you will be presented with a print preview separately for each request.

Item Status

The **Item Status** tab is primarily an informational tab, though certain actions can be taken from it as well. In general we recommend all sending and receiving actions occur in the **Single Scan** tab. Please see documentation on the other tabs for information on actions.

Given an item barcode, the Item Status tab will display information about the item and the current request associated with that barcode. There are four sections in Item Status: **Item Details**, **Transaction Details**, **Hold Blocks for Copy**, and **Capture Rejections**.

Item Details shows the following information:

- *Barcode* - the barcode of the item
- *Status* - the status of the item (Available, Checked Out, In Transit, etc.)
- *Owning Lib* - the library that owns the item
- *Title* - the title associated with the item
- *Author* - the author associated with the item
- *Call Number* - the call number associated with the item

Transaction Details shows the following information:

- *Requesting Patron*
    - If you have a live connection to the source ILS, this will show the patron’s name.
    - If you do not have a live connection to the source ILS, this will show the staff proxy account name.
- *Requesting Library* - the library which initiated the request
- *Patron Barcode*
    - If you have a live connection to the source ILS or entered a patron barcode at the time of request, this will show the patron’s barcode.

    - If you do not have a live connection to the source ILS, this will show the staff proxy account barcode.
- *Pickup Library* - the library where the requested item will be sent for pickup
- *Request Date* - the date the request was placed
- *Capture Date* - the date the item was “captured” for this request.
    - A capture is when a specific item is scanned & associated with a specific request.

Hold Blocks for Copy shows any current hold blocks on the item. A hold block happens when **Disallow for Requests** has been set on an item. This list shows the date of the block, the staff member who set the block, the reason for the block, and whether the block is for one hold or all holds.

If the block is for one hold, it will show the request ID of the hold block type. If the block is for all holds, you can select the **Allow for requests** action in the upper right of the Item Status interface to reallow requests on that item.

If there are no hold blocks on the copy, you will not see this section.

Capture Rejections shows a list of times a request has been rejected and retargeted, whether through staff action or due to the retarget interval expiring. The retarget interval defaults to 24 hours, after which a non-captured request will try to find another item. Your Fulfillment system may have a shorter or longer retarget interval, so please contact your administrator or support provider if you have any questions.

The Capture Rejections list is sorted descending by date, and shows the location, barcode, and date of any rejections. If there have not been any rejections on this request, you will not see this section.

Searching the Catalog and Placing a Request

To place a request in Fulfillment, click the **Catalog** button in the upper right corner of the Management Interface. This will open a new browser tab with a staff-focused view of your union catalog, which includes all holdings from your consortium partners even if they are not lending these items.

Search Options

There are three search options in Fulfillment: **Basic Search** (default), **Advanced Search**, and **Browse Search**.

In **Basic Search** you can enter single or multiple search terms in the search box. Using the **Type** dropdown, you can select the index to search in: Keyword, Title, Journal Title, Author, Subject, or Series. Indexes are configured by your system administrator. In the **Format** dropdown you can select any one of a number of desired formats for your search. Format is drawn from MARC record fixed field data, and the collective groupings of “All books”, “All Music”, etc. are configured by your system administrator.

In general, most of your search needs should be addressable in Basic Search.

In **Advanced Search** you can construct a search across indexes and join search statements with Boolean operators. Each search statement allows you to select an index, a match operator, and then enter terms. You can add search statements with AND or OR operators. To add a new search statement, click **Add Search Row**. To remove a search statement, click the **X** at the end of the row.

Match operators include the following:

- *Contains* - the selected search index contains the search term, including stemmed variants
- *Does not contain* - the selected search index does not contain the search term, including stemmed variants
- *Contains phrase* - the selected search index contains the entire phrase as a quote, i.e., adjacent works match exactly without stemming
- *Matches exactly* - the selected search index contains the precise search string, right- and left-anchored, excluding stemmed variants
- *Starts with* - the selected search index contains the search term(s) as a left-anchored search, akin to a browse search.

In addition, you can select one or several filters to apply pre-search. Filters are primarily drawn from MARC record data. Filters drawn from MARC data include Item Type, Item Form, Language, Audience, Video Format, Bib Level, Literary Form, and Publication Year.

Other filters include:

- *Search Library* - this will default to your library.
- *Sort Results*- by default this will sort by relevance, but you can also choose to sort by Title, Author, Publication Date, and (if configured) Popularity.
- *Limit to Available* - this checkbox will only show results that are available. Please note that not all participants in your Fulfillment system may have real-time availability information.
- *Group Formats and Editions* - this checkbox will collect formats and editions of the same title and group them into a set, which allows the requestor to place a hold across all or selected members of the set. More information is below in the **Place ILL Request** section.

Advanced Search also includes **Numeric Search** and **Expert Search** options.

Numeric Search allows you to pick a numeric index and enter a search value. Available indexes include:

- *ISBN* - International Standard Book Number, configured based on MARC data
- *ISSN* - International Standard Serial Number, configured based on MARC data
- *UPC* - Universal Product Code, configured based on MARC data
- *LCCN* - Library of Congress Control Number, configured based on MARC data
- *TCN* - Title Control Number, either configured based on MARC data or database ID number depending on your Fulfillment setup
- *Call Number (Shelf Browse)* - Call Number information in the holdings record. Note that this will include all call numbers present in holdings records in the system regardless of call number type (Library of Congress, Dewey, other)
- *Item Barcode* - A barcode attached to a specific item in the system

The Numeric Search also includes a filter for *Search Library* which will default to your library.

Expert Search

If you are familiar with MARC tags and subfields, you can use Expert Search to create a set of tags, subfields, and values to search. Click **Add Search Row** to add another search row. Search rows are combined with an implicit AND operator. Click the **X** at the right end of the search row to remove the search row. Note that a MARC search is more resource intensive than a regular search and may be slower to return results. We recommend using this search as a last resort.

The Expert Search also includes a filter for *Search Library* which will default to your library.

In **Browse Search**, you can select an index of Titles, Authors, Subjects, or Series and enter search values in the box labeled *Starting With*. This will perform a left-anchored browse search and the results will show your search terms within context in the browse index. The number in parentheses indicates the number of bib records matching the index term. Click on the index term to open a search results page. There is also a *Search Library* filter on this search which will default to your library.

Search Results

The **Search Results** gives you a list of titles that match your search parameters. Each title can include multiple formats and editions, if this option was selected at search (this option is selected by default in Fulfillment search). Titles will list format(s) available underneath the title, and if there is more than one bibliographic record represented in the title, this is indicated by a numeral in parentheses following the title.

On the left hand side of the screen are several post-search refinement options, including the ability to change results sorting as well as limit the search results set by author, series, genre, or subject.

Placing a Request

If there are copies available to request, you will see the **Place ILL Request** button on the right side of each title result. Click this button to go to the request form.

The request form will ask you to select some options:

- Requesting party
    - *Place hold for patron by barcode* - enter the barcode of the requesting patron in the box. If you have a Connector enabled, this will allow full automation of the request including automated checkout if it is enabled. If you do not have a Connector enabled, the patron barcode will be attached to the request for informational purposes.
    - *Place hold for me* - this will place the hold for your staff user account. Typically this is a proxy account associated with your staff login.
- *Select your desired format(s)*
    - This will show all formats available for request. Select your preferred format(s).
    - You can use CTRL click to select multiple formats.

    - If you do not select a format, your request may be filled with any of the formats listed.
- *Select your desired language(s)*
    - This will show all languages available for request. Select your preferred language(s).
    - You can use CTRL click to select multiple languages.
    - If you do not select a language, your request may be filled with any of the languages listed.
- *Pickup location*
    - This will default to the library associated with your staff login.
    - You can change the pickup library if needed.
- *Suspend this hold?*
    - Select this checkbox to suspend the hold. Optionally, enter a date to activate the request.
    - Suspended holds will not actively search for items unless and until the hold is activated.
    - Note that your administrator may elect to start all holds as suspended in order to allow staff review before the request goes out to the larger system.

Click **Submit** to place your request. You will get either a confirmation message or a failure message depending on whether or not your request is successful. Once a request is succesfully placed it will be visible in the **Pending Requests** → **Requests for My Patrons** interface.