

# **A Tutorial for Using URSA**

## **Interlibrary Loan Training Manual**

**Unmediated Mode  
2.62**

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**Copyright November 2001**

Choose "Patron" from the tutorial's "Main Menu"

## SEARCHING & SUBMITTING REQUESTS

### Guest Mode

Anyone can search Alleycat from the Internet by logging in as "guest". In guest mode, you can perform several searches of the catalog using any terms and any Type of search. However, no requests may be submitted in this mode.

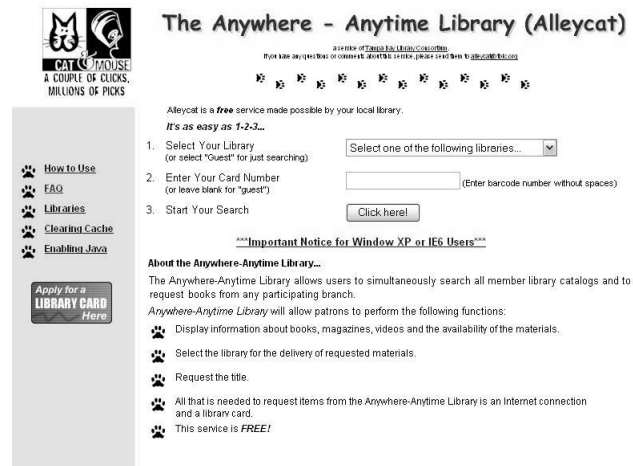
Click **down arrow**

Choose "**Guest**" from the "**Select Your Library**" dropdown list.

In the "**Enter your card number**" box

Type `guest`

Click on the "**Click here!**" button



The screenshot shows the Alleycat website interface. At the top left is a logo with a cat and mouse and the text "PATROL MOUSE A COUPLE OF CLICKS. MILLIONS OF PICKS". To the right is the title "The Anywhere - Anytime Library (Alleycat)" and a small URL. Below the title is a navigation bar with icons. The main content area has a heading "Alleycat is a free service made possible by your local library. It's as easy as 1-2-3..." followed by three numbered steps: 1. Select Your Library (or select "Guest" for just searching) with a dropdown menu; 2. Enter Your Card Number (or leave blank for "guest") with a text input field; 3. Start Your Search with a "Click here!" button. Below the steps is an "Important Notice for Window XP or JIE6 Users" and a section "About the Anywhere-Anytime Library..." which states that the service allows simultaneous searches of member library catalogs and request books from any participating branch. It lists functions: displaying information about books, magazines, videos, and availability; selecting the library for delivery; requesting the title; and noting that an internet connection and library card are needed, and the service is free.

At the **Patron Main Menu**

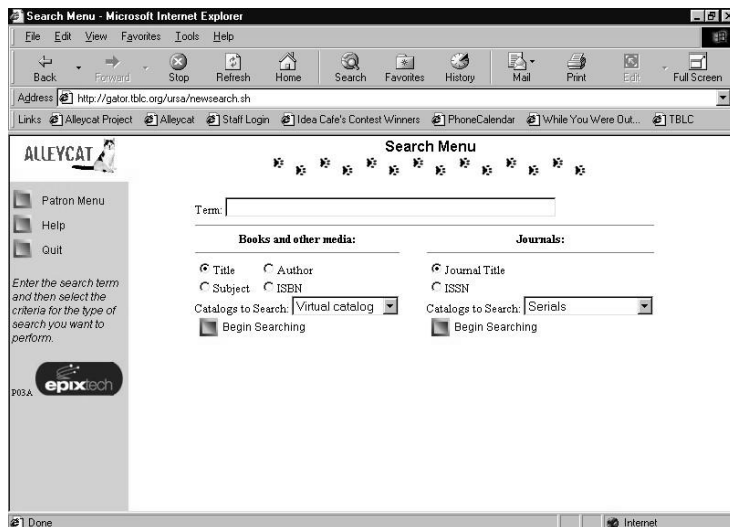
Click

Searching and Requesting

## Search Menu

Read the box below the message to understand what the error message means and how to handle the issue.

To try another "What If.." click the "**What If Menu**" button.



In the **Term** field

**Type the** Three Stooges

**Click "Begin Searching"**

## Review Search Results

**Click on the title**

Review the information about the title

**Click "Quit"** (located on the yellow frame)

## Patron Mode

In patron mode you can search and request items. To log in choose a library and enter your patron barcode.

**Select a Library from the "Select Your Library" dropdown list.**

**Type** a patron barcode number from the left

Melville Patron -  
222060000141116

Dewey Patron -  
22112007501514

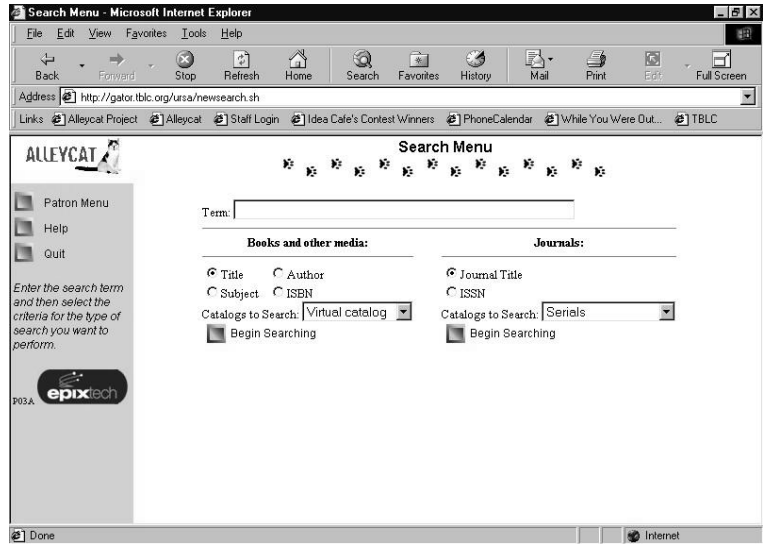
**Click on the "Click here!" button**

At the **Patron Main Menu**

**Click**

Searching and Requesting

## **Search Menu**



Melville patron -  
***Mediterranean living***

Dewey patron -  
***A zoo in my luggage***

In the **Term** field

**Type the title of the book**

**Click "Begin Searching"**

## **Review Search Results**

**Click on one of the titles**

**Choose library for item availability**

[Note: For the tutorial leave the library that is showing].

**Click "Show Availability"**

## **Availability**

**Click on "Request" to initiate a request for the item.**

Melville patron name =  
Alfred Hitchcock

Dewey patron name =  
Sherlock Holmes

**Pickup locations:**

Melville patron select-  
Grisham Branch

Dewey patron selects -  
Dickinson Branch

## Request Form

The system will issue your request for: **Colors of the mountain / Da Chen.**

This request will be placed for:  
Patron Name: **ILL-URSA-01**  
Is that your name?  Yes  No

Pickup Location:

Need by Month:  Day:

NOTE: The date you enter is the date that the system will stop trying to obtain the item for you. It is not a guaranteed delivery date. You will be notified when your item arrives.

Some libraries charge for photocopies. Enter the maximum amount you are willing to pay: \$

Notes for Librarian to Review:

NOTE: Entering notes will force your request to be reviewed. This may slightly delay processing your request in some cases.

E-mail address for notification:

**Click on "Yes" radio button to confirm patron name.**

**Select a "Pickup Location" from the dropdown list.**

VERIFY the month and day that you would like the item.

[Note: this tutorial does not allow this date to be changed]

**Click below the scroll bar to scroll down**

**Type the patron's e-mail address [optional]**

**Click "Submit Request"**

### **Request Confirmed**

Make note of the request number.

**Click "Patron Menu"**

### **Reviewing Patron Requests**

Patron requests can be reviewed from the **Patron Menu** screen

**Click "Review Your Requests"**

Patron requests can be cancelled from the **Patron**

**Menu** screen by selecting the title link.

**Click "A zoo in my Luggage"**

**Click "Cancel Request"**

Confirm that you wish to cancel request

**Click "YES – cancel request"**

Note the request is now cancelled

**Click "Quit"** [located on the yellow frame]

Choose "Staff" from the tutorial's Main Menu

On Alleycat live use the following URL to perform staff functions:

***gator.tbhc.org/~ursa/staff\_login\_frame.html***

NOTE: We do NOT recommend using this method for items that are found in Alleycat. It is better to authenticate the patron barcode through patron mode.

Melville staff -  
***The cat who knew a Cardinal***

Dewey staff -  
***The cat who wasn't there***

## STAFF FUNCTIONS

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### Melville Staff -

StaffID = melpl

Password = book

Must type logins and passwords in **lower case**.

### Dewey Staff -

StaffID = dewpl

Password = book

Use the **tab** key between fields

**Click "Submit Input"**

## STAFF INITIATED REQUESTS

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From the **Staff Menu**

**Click "Search Virtual Catalog "**

In the **Term** field

**Type the** title of the book

**Click "Begin Searching"**

**Review Search Results**

**Click below the scroll bar to scroll**

**Click on one of the titles**

**Click "Show Availability" for library listed**

### **Availability**

**Click on "Request" to initiate a request for the item.**

### **Request Summary**

Confirm the basic information:

VERIFY the month and day that the patron would like the item.

Leave the Maximum Cost field blank.

A minimum of four pieces of information are required in order to submit a valid request. They are:

Patron ID -patron's library barcode number

Pickup Location - library to which the borrowed item will be sent

Title - the item's title

Lender - At least one lender is required in the lender string

### **Patron Information**

(Use Tab Key between fields)

**Click below the scroll bar to scroll down**

**Click "Edit Patron Information"**

**Type** the patron ID

**TAB**

**Type** patron name

**TAB**

**Type** the patron's e-mail address [optional] but for the tutorial you must type one in

**TAB**

**Select a "Pickup Location" from the dropdown list.**

**Click "Save Changes"**

Melville Patron -  
Agatha Christie  
21667013520169  
Grisham Branch

Dewey Patron -  
Sherlock Holmes  
2735700001035  
Dickinson Branch

Patron name should be entered as it appears in your automation system.

## **Lender String**

[Use this only if you want to change the lender string]

Action: To add or subtract the lender

Order: The order in which the lender is contacted

Lender: The library code of each lender

Call No.: The call number of the item at each lender

Union: An indicator that the item was found in a union catalog

Remove a lender from the string:

Click on the "-" sign to remove lender

Adding a lender

*We will not use this feature unless we have a "Union Catalog" added to the Anywhere-Anytime Library.*

## **Reorder Lender String**

**Click below the scroll bar to scroll down**

**Click "Change Route Sequence"**

**Click radio button to identify the lender you want to reorder**

**Click WDPL radio button  
(the new position for lender)**

**Click "Save Changes"**

## **Finishing Request**

**Click below the scroll bar to scroll down**

**Click "Submit Request"**

The Request Editor Results screen displays. The screen shows the request number and indicates that the Initial lender is to be determined based on the order you specified.

**Click "Staff Menu"**

For Melville staff clicks  
DEWPL

For Dewey staff clicks  
MELPL

## **PROVISIONAL REQUESTS**

### **(Borrowing Library)**

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In unmediated mode, you should rarely find a request here. Requests are dropped into this file because the patron entered a note in the “Note to the Librarian” field, no lenders were found or they forgot to select a pickup location.

Note: On a shared system all libraries must check this daily.

### **Staff Menu under Borrowing**

**Click “Provisional Requests”**

A list of requests that need reviewing appear.

**Click on the title link to review the request**

Look for a problem with the request. The sample request shows a note to the librarian under “Patron Note”. It appears that we need to make sure that the pickup location is NPL (North Public Library)

**Click below the scroll bar to scroll down**

**Click “Edit patron Information”**

**Click the down arrow on “Pickup Location” until you see “North Public Library”**

**Click “Save Changes”**

**Click “Submit Request”**

**Click “Staff Menu”**

## Lending (Mediated Requests) Printing the Pick List

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Occasionally a borrowing library will send you a mediated request. You should check “**Review Incoming Requests**” everyday.

[Note: In a **Shared** system, only the “key” library needs to check this file.]

On the Staff Menu, under Lending

Click “**Review Incoming Requests**”

### Incoming Requests Menu

Decide which order you want your requests

Choose “**Call Number**”

Decide where you want the "pick list" sent (**Output Destination**). “Browser” is the default option, if you want to use one of the other options it will need to be setup by your project manager.

Choose “**Browser**”

Decide if you want all requests printed or if, you want to review requests and choose which requests to print.

Choose “**Browse List of Requests to Print**”

Check  the box to the left of the title *Morality and beyond*

Click “**Select to Print**”

You will see the pick list for the title printed to the screen.

At this point, you would print the pick list and pull the books from the shelves at your library. To print, click on the **Print** button in the **web browser** you are using to print the pick list/shipping form. *For best results, print 1-2 requests per page.* You may wish to review the sample Pick List located in the back of this booklet.

Click “**Printed Successfully**”

For remaining titles

**Check ✓ the box to the left of all the titles**

**Click “Select All to Print”**

This will generate a pick list. For the purposes of this tutorial we'll say that you've already printed the list. The final screen shows no items to review.

To exit from the screen

**Click “Staff Menu”**

## **Ship Loans**

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### ***Run Send Items List***

For the exercises below you will use the Send Item List supplied with the tutorial.

***Look on the shelves for the "books" on the Send Item List and your pick lists.***

For the exercises below you will just be using the Send Item List supplied.

### **If supplying:**

Indicate to the automation system that you are supplying.  
Route the item to the ILL processing staff for shipping.  
Update URSA [See below: *Supplying Items*]

### **If not supplying:**

Indicate to the automation system unfilled or passing.  
Update URSA [See below: *Not Suppling Items*]

### **Shared systems:**

If you have more than one library on your automation system, the request will follow your automation system's holds matrix.

If you are the last library in your automation system to pass on the request then the request in URSA will "Age" and move on to the next library in the lender string.

You may wish to print the books found on the tutorial CD for this exercise.

**Melville staff use these barcodes:**  
28470030  
12422118

**Dewey staff use these barcodes:**  
70088405  
70131270

## **Supplying Items**

Before doing this step, apply an Alleycat book label to the front cover of the book. Do not cover the permanent barcode.

### **Staff Menu**

**Click "Ship Loans"**

**Set to Shipped: Loans** screen displays.

Set aside the "Cat" book for later, ship the other two items following the steps below:

**Type** permanent barcode found on the item in the Item Barcode field.

**Click "Submit Input"**

A message displays to confirm the change of status or indicates that an error has occurred and provides instructions on how to proceed. If the procedure is successful, the confirming message also provides shipping instructions for the item.

**On book label, enter request number and pickup location.** (The "Route To" displayed on the screen is the pickup location)

**Ship book using the correct Alleycat/DLLI shipping label and bag.**

**Click "OK"**

Repeat steps for other item.

**Click "Staff Menu"**

## **NOT SUPPLYING ITEMS**

If the lending library is not supplying the item, the library updates the status of the request by completing the **Set to Not Available** screen.

Using the items list on the "Send Items List" not found on the shelf for this exercise.

From the **Staff Menu**

For this tutorial you **MUST** supply a reason, if you do not you will get an error message. It is always good practice to let the patron and borrowing library know why you are not supplying.

**Click “Set Not Available”**

To select which item to set to not available

**Click “Requested Title” pull-down menu & select the title *The wreck of the Titanic foretold?***

Hit the TAB key until the cursor is in the “Reason” field.

**Type the reason the item cannot be supplied in the Reason field.**

**Click “Submit Input”**

**Click “OK”**

Repeat steps for the second title *The gymnastics almanac*

When done with the second title

**Click “Staff Menu”**

**What happens to the request?**

The request is sent to next lending library.

If there are no other lenders then the lending string is repeated for 30 days. If the request is not filled after 30 days then it is set to UNFILLED and the borrowing library is notified via e-mail. Each library needs to have an email account for ILL for these notifications.

Use the books found on the CD to perform this exercise.

**Melville Staff:**

2080 / 70088405  
2020 / 70131270

**Dewey Staff:**

2054 / 28470030  
2026 / 12422118

**NOTE:** An unmediated library receiving an item from a mediated library must use the request number in the first box. If receiving from another unmediated library, you can use the permanent barcode in both boxes.

## RECEIVING ITEMS (Borrowing Library)

Receive the items from the lending library.

Staff Menu

**Click “Receive Loans”**

In the first box labeled Request Number/Barcode

**Type** the request Number

**TAB**

In the second box labeled Temporary Barcode

**Type** the permanent Barcode

If URSA is to create a temporary bibliographic and item records for the local circulation system it uses the permanent barcode for the duration of the loan.

**Click “Submit Input.”**

Note patron information and pickup location

**Click “OK” to proceed with additional items**

When all items are received

**Click “Staff Menu”**

**(For *Extended Circulation* libraries)** Check in item on automation system. This will generate automation system hold notification.

[See work flow procedure sheet located in the back of this manual for your automation system]

Place items on hold shelf for patron pickup.

Note: If the patron does not pick up the item, when the item is removed from the hold shelf you will need to release the hold **BEFORE** setting the item to **RETURNED** in Alleycat. To release a hold, follow your normal automation system procedures.

Note: you cannot submit a Suggestion/Question and a Problem using the same feedback form.

## RETURNING ITEMS (Borrowing Library)

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Identify Alleycat items by the Alleycat ILL label.

Forward item to staff that handles the Alleycat borrowed materials. For unmediated libraries you do **not** need to check the item in before proceeding to the Staff Menu.

ILL staff in URSA software on the **Staff Menu**

**Click “Return Loans”**

Set to Returned screen displays

**Type** request number

**Click “Submit”**

Item record status is updated to RETURNED.

**Click “OK“**

Proceed with additional items when finished

**Click “Staff Menu “**

For unmediated systems any temporary records created by URSA on the automation system are automatically deleted.

Ship book using Alleycat shipping label.

## COMPLETED REQUESTS (Lending Library)

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When the borrowed item is returned to lending library

Staff Menu

**Click “Complete Loans “**

**Type** request number

**Click “Submit Input”**

To proceed with additional items

**Click “OK “**

When all items are set to **Complete** status

**Melville Staff:**

2080

2020

**Dewey Staff:**

2054

2026

**Melville Staff:**

2054

2026

**Dewey Staff:**

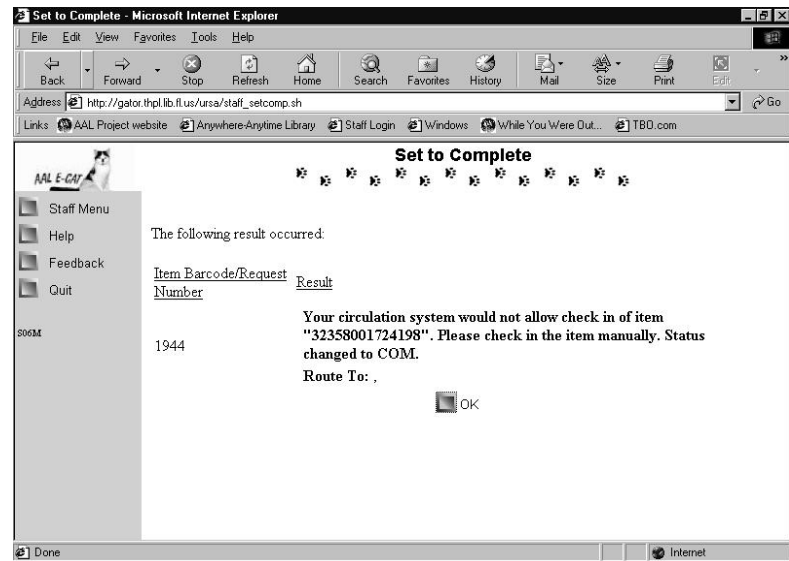
2080

2020

## Click "Staff Menu "

Status is updated and can optionally check the item in on the automation system if the library is running in unmediated mode.

If your library is running in unmediated mode you may receive the following error message. It means that there are additional holds on the item. Check the item in on your automation system to generate the next hold.



## REQUEST INQUIRY

Staff may inquire about the status of a request, review unfilled requests, cancel requests or recall loaned items.

From **Staff Menu**

Click **“Request Inquiry”**

Request Inquiry screen displays. Fill out one or multiple fields to locate a request. Note that the first three fields are in italics. If using one of these fields you do not need to specify a status. All others you must supply a status.

To check on a single request:

Type **Request Number**

Click **“OK”**

The **Item Details** screen will appear. Review the information about the request. Note the STATUS field to see the history:

Click the scroll bar to scroll down

Click **“OK”**

### Search by Status

Locate the “Status” field

Click **down arrow**

Click **Pending**

Click **2<sup>nd</sup> radio button “Requests made by your library’s patrons**

Click **“OK”**

### Request Display Screen

Click **request # 11107**

Click **“OK”**

Review the information about the request.  
Note the **“Cancel”** button. **Do not cancel the request.**  
To leave this screen without canceling:

Click **“OK”**

Use the following request numbers to view information about the request:

2020  
2026  
2054  
2080

Note: the following cannot be done on the tutorial.

### Canceling a Patron's Request

A request can only be cancelled if it is in **"PENDING"** status. A cancel button will appear below the **"OK"** button on the **Item Details** screen.

**"CANCEL"** will *cancel* the patron's request.

### Status "Any" requests:

Locate the "Status" field

Click **down arrow**

Click **Any**

Click **2<sup>nd</sup> radio button "Requests made by your library's patrons"**

Click **"OK"**

### Request Display Screen

This view shows all requests regardless of status that the borrowing library's patron has made. Highlighting any one request and clicking "OK" will take you to the **Item Details** Screen which shows the request number, bibliographic information, patron id and status history for the item.

Click **"OK"**

Click **"Staff Menu"**

Return to the "Main Menu" of the tutorial, Proceed to the "What If" section or repeat any section you like.

**Melville:**  
The cat who wasn't there  
63395112

**Dewey:**  
The cat who knew a  
Cardinal  
10054996

## WHAT IF ....

---

### **Cannot Ship**

Remember that mediated mode requires two pieces of information in order to ship an item: **Barcode and Request Number**.

### **Cat Tree Menu**

Roll your mouse across the branches of the tree and you will see objects appear

**Click "Cannot Ship" cat**

**Set to Shipped: Loans** screen displays.

Using the "Cat" book you set aside in a pervious exercise, ship the item following the steps below:

**Type** barcode number in the barcode number field

**Click "Submit Input"**

An error message displays indicating that an error has occurred.

**Read** the information in the window that displays

**Click "Feedback"**

### **USING FEEDBACK**

Use the **Feedback** button located on the yellow panel to submit:

- Suggestions
- Questions
- Problems

Verify your information in the first part of the form. Check off the intent of the feedback.

**Click "Problem" radio button**

**Click on the hyperlink word "Problem"**

**Type** the title of book

Use TAB key between fields

Permanent Barcode:

**Type the** permanent Barcode

Current Status:

**Click "Pending" radio button**

Error Message:

**Type** Cannot find request number

**Click below the scroll bar to scroll down**

Operation Attempted:

**Click "Ship" radio button**

Problem Frequency:

**Click frequency choice**

Problem Severity Level:

**Click a choice for severity level**

**Click below the scroll bar to scroll down**

Problem Description:

**Type a** description of the problem

**Click "Send Feedback Report"**

The feedback will go to TBLC and we will answer you or *epixtech* will contact you depending on the issue.

**Click "Quit"** (located on the yellow frame)

**Melville Staff:**

2080 / 70088405  
2020 / 70131270

**Dewey Staff:**

2054 / 128470030  
2026 / 12422118

**Melville Staff:**

2054  
2026

**Dewey Staff:**

2080  
2020

**RECEIVING ERROR**

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**Click "Cannot receive item" cat**

In the first box labeled Request Number/Barcode

**Type** the request Number

**TAB**

**Type** the barcode Number

**Click "Submit Input."**

ERROR: *Cannot receive item. Status remains PEN.*

Read the box below the message to understand what the error message means and how to handle the issue.

To try another "What If.." click the "**What If Menu**" button.

**RETURN ERROR**

---

**Type** request number

**Click "Submit"**

Read the box below the message to understand what the error message means and how to handle the issue.

To try another "What If.." click the "**What If Menu**" button.

**Melville Staff:**

2054

2026

**Dewey Staff:**

2080

2020

**Melville:**

Cat who knew a Cardinal

**Dewey:**

Cat who wasn't there

## COMPLETED ERROR

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**Click “Cannot Checkin Item” mouse**

**Type** request number

**Click “Submit Input”**

Read the box below the message to understand what the error message means and how to handle the issue.

To try another "What If.." click the "**What If Menu**" button.

## Searching Request Inquiry

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Click “Search Request Inquiry” cat

ERROR: **Can't find the request in REQUEST INQUIRY and I know it exist.**

Search Request Inquiry by Title

**Click “Search Inquiry” cat**

**Type** Cat title

[type it exactly as it appears at the left]

**Click** down arrow on “**Status**”

Select “Pending”

Leave the radio button highlighted that reads “**Requests made to your library**”

**Click “OK”**

Request Display screen appears with message “**Search Terms not found**”.

**Melville:**

The cat who knew a cardinal

**Dewey:**

The cat who wasn't there

**Click "OK"**

**Type** Cat title

[type it exactly as it appears at the left]

**ENTER**

**Click** down arrow on "**Status**"

**Select** "Pending"

Leave the radio button highlighted that reads "**Requests made to your library**"

**Click "OK"**

**Item Detail** screen appears

Read the information provide about what to look for on this screen.

**Click "OK"**

To try another "What If.." select an error message

To return to the start of the tutorial select "**Main Menu**"

To quit the tutorial click the "**Quit**" button in the lower right hand corner

This concludes the tutorial. You may repeat any sections you like.

## Frequently Asked Questions

***What is the URL for patrons?***

<http://alleycat.tbhc.org>

***What is the URL for staff?***

[http://alleycat.tbhc.org/~ursa/staff\\_login\\_frame.html](http://alleycat.tbhc.org/~ursa/staff_login_frame.html)

***What does the word Alleycat stand for?***

Anywhere-Anytime Library Electronic Catalog

***The cat that appears on all the screens in the upper left corners, what is its real name?***

Chloe, Diane Solomon's (Director of TBLC) 3-legged cat who past away shortly after Alleycat was turned on May 30, 2000.

***How does the Anywhere-Anytime Library work?***

- You log into Alleycat using your library barcode number and select the name of the library you most often frequent.
- Use the Search screen to locate the book you want to request.
- Click the Request button, verify your name, and enter your e-mail address (optional).

***What can be requested through the Anywhere -Anytime Library?***

- Any item that the lending library is willing to lend.
- Items that are currently unavailable at your library, e.g. charged out, lost, missing, at the bindery, etc.

***What cannot be requested through the Anywhere-Anytime Library?***

- Items currently available at your library.
- Journals, magazines, newspapers, and other serials.
- Photocopies of journal articles, conference proceedings, etc.
- Reference books, microfilm and other non-circulating material.

***Why are items listed that cannot be requested?***

Since the libraries in the Tampa Bay area participate in reciprocal borrowing, Alleycat was designed to create a virtual union catalog of all library catalogs in the area. This gives you the opportunity to see what is available at the libraries. You then have the option of going directly to the library and checking out or using the material there instead of requesting them to be delivered to your local library.

***When will the book arrive from the Anywhere-Anytime Library?***

If the item is available for lending, delivery to your pickup location is usually within 3-4 days after placing the request. Please use "Review your Request" option on the Patron Main Menu to track your request.

***What is the minimum loan period for Anywhere-Anytime Library books?***

Patrons will be able to keep the book for 21 days.

***Who is eligible to request items from the Anywhere-Anytime Library?***

Items can be requested by any library patron with a current library card from one of the participating libraries. If the card is expired, they will be blocked from authenticating.

***How can I get material not owned by any of the participating libraries of the Anywhere-Anytime Library?***

Use the Interlibrary Loan Request Form found at your library's website or the Alleycat site to submit a request to acquire other material.

### ***What hours is the Anywhere-Anytime Library available?***

It is available 24 hours a day, 7 days a week except during scheduled maintenance.

### ***What is a search strategy?***

The search strategy is the library catalog(s) that you wish to search. A drop-down box is provided that allows you to choose to search only one catalog, a group of catalogs or all catalogs.

### ***How does the Alleycat perform a search?***

All searching is by keyword, except for ISBN. Right truncation is permitted. It ignores the initial article and punctuation.

### ***What kind of search did it do when I hit the enter key?***

If you hit the enter key instead of clicking on "begin search", it will do a books search.

### ***How are the search results sorted?***

If there is more than one record for an item, it is merged into one (de-duped) based on ISBN, LCCN, and OCLC respectively. The search returns the results alphabetically by title (excluding articles "A", "An" and "The").

### ***How are the search results displayed?***

- If searching only one catalog, the *Availability Screen* will display.
- If doing a combined search of all catalogs and if only one of the libraries owns the item the *Availability Screen* will display.
- If more than one library owns the item, the Details Screen will display first and you can then ask for each individual *Availability Screen*.
- 30 results at a time are displayed on each page. Each page is in alphabetical order

### ***Can serials be viewed and requested?***

Serials are displayed so that "books in a series" can be searched (World Almanac, Information Please). These can be found under a monograph/book search.

Journal titles (Business Week) can be found under journal search. The TBLC Union Catalog of Serials will be accessible shortly.

Some journals will be retrieved in a book search due to the fact that libraries without a serials module placed a short monograph bibliographic record in their automation system.

### ***Where does the shelf status message come from?***

The item's shelf status message is pulled from the owning library's automation system.

### ***Why don't I see shelf status for some items?***

If the information about the item is in all capital letters, this item is on order.

### ***Can items be blocked from requests?***

Yes, such items as Reference books, items marked non-circulating, or "local request only" can be blocked from requesting.

### ***Will an item come from the library under which the request is placed?***

The request will be processed through the lending string and will be filled by one of the libraries in the string, not necessarily the library whose holdings were being viewed.

### ***What is URSA? epixtech?***

URSA – Universal Resource Sharing Application – the software behind Alleycat  
epixtech – automation systems developer that owns URSA and Dynix

### ***Where is the Alleycat server housed?***

Tampa Bay Library Consortium

***What is the difference between mediated and unmediated?***

Staff must review mediated requests before a hold is placed.

Unmediated requests will be processed through the library's automation system. Holds will be placed within the system and items to be pulled will show up on the library's "to be pulled" list each day.

***How long will unmediated requests be held at a library before being passed to the next one in the lending string?***

Each library can determine the length of time it remains at that library before they are passed on to the next library. The settings range between 3 days for a single site to 10 days for a large multi-branch system.

***What other staff have been trained?***

ILL staff is being trained separately in the use of the system as it pertains to ILL. They will be the ones to handle the mediated requests once your library goes unmediated.

***What does public services staff need to know?***

How to search the catalog, place requests, and review request status. Additional duties may be assigned by participating library directors/supervisors.

***When will this be available for patrons to use?***

It is available now for participating libraries. If your library is just getting setup on Alleycat, your start will be announced.

***Can a patron be authenticated at one library and pick up the book at another? For example: enter the Alleycat as a Pinellas Park Public Library patron and request to pick the book up at Dunedin***

No – the authentication process assures that the patron is a registered borrower at the participating library.

However, if the patron belongs to a shared system such as SPIN and that system has elected to allow the patron to pickup at location within the shared system then authenticating at one library and picking up at another library within the shared system is allowed.

***Will there be patron screens explaining the status messages (i.e., Pending) as well as who the libraries are (SUNLINE)?***

Yes – help screens are available on the Alleycat website.

***How many times a day will we need to check for a pick list for Alleycat?***

The pick list should be checked once a day – every day that the library is open. Libraries may elect to check the list more than once a day.

***How long will patron requests remain on the Alleycat server?***

Requests with a status of completed, expired or not available are archived every 60 days

***Have you been in contact with any other systems that are using this software?***

Yes – There are a number of libraries around the county using this software such as North Bay in the San Francisco area and the State of Maryland.

***How have the other library systems been affected?***

Circulation has increased!

ILL processing does not take as much staff time in the unmediated mode because items to be pulled show up on the library's automation daily holds list which is run as part of circulation's daily routine. Only the mediated requests need extra staff attention.

***Are there plans to use OCLC as an option for ILL?***

epixtech is working on a module that will make OCLC the "lender of last resort." This will be added to Alleycat early in 2002.

### ***What do the error messages mean?***

#### Catalog returned error

The Z39.50 server returned an error to us. Reasons why may vary widely.

*Suggestion: Please contact Lauren Stokes at TBLC*

#### Configuration missing

There is no entry for this catalog in our configuration.

*Suggestion: Please contact Lauren Stokes at TBLC*

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#### Connection closed

For some reason, the Z39.50 server just "hung up" on us, leaving us listening to an Internet equivalent of a dial tone.

*Suggestion: Please try the search again.*

#### Connection timeout

We were unable to connect and have the Initial dialog with the server within a certain time (30 secs.).

*Suggestion: Please try the search again or change the search strategy to only include the library that timed-out.*

#### Connection refused

Usually means there is no program running on the server to accept connections on that port. In other words, either we have the wrong port configured, or the server is not running, or the IP is wrong.

*Suggestion: Please contact Lauren Stokes at TBLC*

#### Search time out

The server connected, search terms were sent, but we did not get search results before the timeout was exceeded (5 secs.).

*Suggestion: Please try the search again or change the search strategy to only include the library that timed-out.*

### ***Questions about the Anywhere-Anytime Library?***

- E-mail your questions to: [alleycat@tblc.org](mailto:alleycat@tblc.org)
- Phone Lauren Stokes: (813) 622-8252 X223

## **IV. STATUS CODES**

See Appendix C -Status Codes for URSA

### **Useful Links:**

Search the Anywhere-Anytime Library at: <http://alleycat.tblc.org>

Keep up to date with the Anywhere-Anytime Library project at: <http://tblc.org/aal>

Join the following list serves to keep up to date: Go to <http://lists.tblc.org> to join them.

National List serve: [URSA\\_TALK@tblc.org](mailto:URSA_TALK@tblc.org)

Anywhere-Anytime staff and interested persons: [aal-talk@tblc.org](mailto:aal-talk@tblc.org)