

URSA TRAINING



MAY 7TH 2002

Functions of MiLE

URL: www.mile.coop/~ursa/staff_login_frame.html

- 1. Lending**
 - a. Review Incoming Request**
 - b. Browse List of Request to Print**
 - c. Select to Print**
 - d. Ship Loans**
 - e. Complete**
 - f. Set to Not Available (unfill)**

- 2. Borrowing**
 - a. Unmediated**
 - b. Mediated**

- 3. Administrative Notes**
- 4. Things to Remember**



LENDING

- I. **Select Review Incoming Requests**
- II. **Download request by selecting Browse List of Requests to Print**
 - A. **Write down the request number**
 - B. **Select Cancel Print Operation**
 - C. **Select Browse List of Request to Print**
 - D. **Mark records needed**
 - E. **Choose Select to Print**
 - F. **After records have been printed select printed successful button (records will be removed from screen)**
- III. **Go back to Staff Menu and select Ship Loans**
 - A. **Type in request number**
 - B. **Optional: type in lender notes**
 - C. **Click submit input button**
 - D. **At this time staff should check out book(s) in Horizon**
 - E. **Place purple wrapper around book**
 - F. **On wrapper write in the Library Code of institution that book is being sent to.**
 - G. **Write in Library Network Delivery Number of institution book is being sent to**
 - H. **Write in Request NO.**

Completing the Loan

The book has been returned to you

- IV. **Go to Staff Menu and select Set to Complete**
 - A. **Insert the request number**
 - B. **Click submit input**
 - C. **Discharge book in Horizon**



Set Not Available (unfill)

- V. Go to Staff Menu and click **Set Not Available**
 - A. Go to **Requested Title** and look in pull down menu
 - B. Select **Input Request Number**
 - C. Type in reason for not sending book
 - D. Click **submit input**



BORROWING

**** Always remember to use buttons do not use back buttons**

1. Enter url: www.mile.coop/~ursa/staff_login_frame.html
2. Enter Staff ID and Password
3. Click on Staff Menu
4. Click on Search Virtual Catalog (books only journal are not available)
 - Results show name of institution number of hits
 - Sort Capabilities (you can sort by title, author and publisher year)
 - Chose a book and then go to availability screen the (availability screen will show location codes, call number and status)
 - If available click Request button
 - Request Summary (should show)
 - Request # (Computer generated you must remember this number)
 - Patron ID (Library Card #)
 - Need by Date
 - Click Edit Patron" (patron information screen)
 - Enter required fields: Patron ID, Name, E-mail address and pick-up location optional fields phone number and address.
 - Click Save changes
 - Request Summary
 - Click Submit Request
 - Request Editor Results
 - Request Number, Status
 - Click New Search Button for new search

- Receiving Books
 - When books arrive: update each book to receive in URSA (MiLE)
 - Enter request number.
 - Click Submit Input
 - Take book to interlibrary loan station at circulation desk for patron pick-up
 - The Circulation staff will create fast add and check out book on Horizon when patron comes to pick-up



- **Return Books**

- Discharge book from Horizon
- Click **Staff Menu** in URSA
- Click **Return Loan**
- Enter **request #** and then click **Submit Input**
- **Change MiLE wrapper ***
- Place in MiLE bend for MiLE out going mail

***Follow this procedure until we receive "ship to slips". We will use the ship to slips in place of the wrappers for returning borrowed books. Remove wrappers from book and insert the ship to slip with library code and network delivery code.**



BORROWING

Patron Initiated request (Staff Mediated)

1. Enter url: www.mile.coop/~ursa/staff_login_frame.html
2. Enter Staff ID and Password
3. Click on **Staff Menu**
 - Click on Provisional requests (this will be done by Purdy/Kresge Staff only)
 - Select request and then Click on **Submit request**
 - Note: 2 ways to check borrowed request: **Provisional requests and Request Inquiry**. **Provisional requests** are request submitted by our patrons and other institutions with a message in the note field. **Request Inquiry** shows requests made by borrowing and lending
 - **Receiving Books**
 - When book(s) arrives update each book to receive in URSA (MiLE)
 - Enter **request number**
 - Click **Submit Input**
 - Take book to interlibrary loan station at circulation desk for patron pick-up
 - The Circulation staff will create fast add and check out book on Horizon when patron comes to pick-up
 - **Return Books**
 - Discharge book from Horizon
 - Click **Staff Menu** in URSA
 - Click **Return Loan**
 - Enter **request number** and then click **Submit Input**
 - Complete on URSA
 - Change MiLE wrapper routing code to lender code
 - Place in MiLE bend for MiLE out going mail



BORROWING

- **Create a blank request**
 - Click on **Blank Monograph Request**
 - Click on **Edit Bibliographic Information**
 - Enter monograph information
 - Click **Save Changes**
 - Click **Edit Patron**
 - Enter patron information
 - Click **Save Changes**
 - Select lenders
 - Submit request



ADMINISTRATIVE FUNCTIONS

Choose either Miscellaneous or Asset Maintenance.

Statistical information can be viewed under Miscellaneous. This function will show the number of items borrowed and lent to participants of MiLE.



things to remember.....

- **DO NOT USE BACK BUTTON**
- **ALWAYS USE MENU AND BUTTONS**
- **IN SEARCH MODE: WHEN SEARCHING AND YOU WANT TO SORT QUERY, IT ONLY SORTS THE CURRENT PAGE**
- **WRITE DOWN REQUEST NUMBER**
- **LOANS ARE FOR 21 DAYS AND THERE ARE NO RENEWALS**
- **DO NOT SELECT *PRINT SUCCESSFUL* BUTTON AFTER VIEWING INCOMING REQUESTS**
- **DUE DATES WILL BE ASSIGNED BY CIRCULATION**

MiLE Communication Information

1. MiLE Website (for participating libraries)

<http://www.umd.umich.edu/mile>

Includes links to public and staff logons to MiLE; documentation

2. MiLE Service (for user logon)

<http://www.mile.coop>

Logons by library and for guests; various info and help screens

3. MiLE Staff Mode URL

http://www.mile.coop/~ursa/staff_login_frame.html

For staff login.

4. Muscle listserv

To subscribe, send email to listserv@lists.wayne.edu

Leave the subject blank

In the body type: subscribe muscle "your name"

Omit a signature line if possible

This listserv is for staff use. Any staff in participating MiLE libraries may subscribe. The listserv is also monitored by epixtech staff.

5. URSA-TALK listserv

To subscribe, send email to listserv@lists.tbic.org

Leave the subject blank

In the body type: subscribe ursa-talk "your name"

Omit a signature line if possible

This listserv is for all users of the URSA software and is hosted by the Tampa Bay Library Consortium.

6. URSA online documentation

<http://cus.rdy.com/archi.pdf>
http://epixursa.epixtech.com/ursa/URSA_MAN/URSAGuide.pdf

This is the current URSA User's Manual.

L. Bugg 5-7-02

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D R A F T
MiLE URSA Library Manager Responsibilities

Here is what the MiLE URSA Library Managers are responsible for. The Library Manager for TLN and the one for SLC are responsible for all libraries in their consortia. All other MiLE libraries have individual URSA Library Managers.

1. Creating and managing staff Ids.
2. Coordinating library staff training.
3. Determining their library's URSA profile and managing the online profile forms.
4. Obtaining any software interface their local circulation system needs for URSA, e.g. ESIP for Voyager sites.
5. Testing URSA and its interface with their local circulation system. Doing any local system setup that needs to be done for circulation to work with URSA, e.g., creating patron records for MiLE libraries.
6. Developing local workflows for borrowing and lending.
7. Creating links to MiLE on their Library Website and from their online catalog.
8. Setting up library staff and public workstations with appropriate Web browser software.
9. Setting up the MiLE van delivery service, as needed.
10. Developing local communication and problem reporting procedures for MiLE/URSA, including staff participation on the MUSCLE listserv.
11. Publicity for the MiLE service.
12. Obtaining wrappers for books loaned through MiLE.
13. Participating in MiLE service evaluation by staff and users, including collecting statistics.

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