Creating & Deleting Temporary Brief Records for Non-RSA Interlibrary Loan Items Procedure

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This procedure is available here: https://support.librariesofrsa.org/project/create-a-temporary-record-for-a-non-rsa-interlibrary-loan-item/

When your library receives an interlibrary loan (ILL) item from a library outside of RSA, create a temporary brief record in WorkFlows to check out the item to your patron.

The benefits of using a temporary brief record
- The record can be created using the library's CIRC account. Using a TECH or an individual cataloger account is not required to create these records.
- WorkFlows will track who has the ILL item checked out. No need to keep manual records of ILL checkouts outside of WorkFlows.
- ILL checkouts in WorkFlows will be included in your monthly circulation report.
- The item can be renewed either by staff in WorkFlows or by the patron using the RSAcat, if your library allows renewals of ILL items.
- WorkFlows will generate an overdue notice if the patron does not return the item before the due date.
- If the item is not returned and becomes long overdue, WorkFlows will generate a bill for the patron and block their account for any fines over $5, $10, $15, or $20, depending on what is configured for your library. As the checkout library, it is your responsibility to notify the patron of a bill for a lost item.

Part I: Create the temporary record.

1. Log into WorkFlows with your library's CIRC, TECH, or individual cataloger account.

2. Click on the Circulation+ module at the top of the screen.

3. Open the Items group on the left.

4. Place your cursor over the Add Brief Title wizard and right click.

5. Select Properties from the menu.

6. A properties box will open. On the Defaults tab:
   a. Ensure format is BRIEF.
   b. Ensure "use entries" is also BRIEF.

     c. Check the box before "Shadow title." Shadowing prevents the temporary record from being visible to patrons in the RSAcat. The record will still be visible to staff in WorkFlows.

     d. Select your WorkFlows library code from the library menu.

     e. Leave the rest of the defaults as-is.

     f. Click OK to shut the properties box.

7. Left click on the Add Brief Title wizard to open it.

8. In the title info section:

     a. Leave these fields blank:

          ISBN 020

          Personal author 100

     b. Backspace **REQUIRED FIELD** from the title 245 line.

     c. Type the item's title, all in upper case, into the title 245 line. Omit initial articles *a, an, the* from the title.

     Example:

Title:	245			CAT OWNERS SURVIVAL GUIDE

     d. Backspace **REQUIRED FIELD** from the cataloger email 592 line.

     e. Type "leave as brief" (but without quotation marks) into the cataloger email 592 line. "Leave as brief" alerts RSA that the item cataloged on the temporary record should stay cataloged on that record and not be upgraded to an OCLC record.

Cataloger Email:	592			leave as brief

9. In the call number and copy info section:

     a. *New call number* – Leave the auto-generated XX call number as-is.

     b. *Class scheme* – Select DEWEY.

     c. *Library* – Ensure your WorkFlows library code is selected.

     d. *Item Type* –

- If you received the item via Find More Illinois select **ILL-FMI**.
- If you received the item via OCLC, faxed request, or another source select one of the **ILL** item types. **ILL** is the RSA standard item type. (NOTE: If you want the ability to track more detailed statistics you may select one of the other **ILL** item types listed at the end of this document, but this is not required.)

     e. *Home Location* – Select ILL.

     f. *Item ID* – Enter the item ID (barcode number) found on the item. Do not enter spaces in the item ID.

g. *Item cat1*: Select UNDEFINED.
h. *Item cat2*: Select UNDEFINED.
i. *Item cat3*: Select BOOK.
j. *Item cat4*: Select UNDEFINED.
k. *Item cat5*: Select UNDEFINED.
l. *Item cat 6*: UNDEFINED should be grayed out and already selected.
m. *Item cat 7*: UNDEFINED should be grayed out and already selected.
n. *Item cat 8*: UNDEFINED should be grayed out and already selected.
o. *Item cat 9*: UNDEFINED should be grayed out and already selected.
p. *Item cat 10*: UNDEFINED should be grayed out and already selected.

10. Click the "Add Brief Title" button at the bottom of the screen.

11. On the pop-up box that confirms "Record Updated," click close.

The item is now ready to check out to the patron who requested the item.

12. Go back to the Items group in the Circulation+ module.

13. Place your cursor over the Add Brief Title wizard and right click.

14. Select Properties from the menu.

15. On the Defaults tab, uncheck the box before "Shadow title." Click OK to shut the properties box. Unchecking this box ensures that any additional brief records you create in the Add Brief Title wizard will not be shadowed.

16. When you exit WorkFlows at the end of the day, click Yes on the box that warns, "Properties have been changed." Would you like to save changes?"

Part II: Delete the temporary record.

1. Discharge the item from WorkFlows when the patron returns it.

2. *Preferred method:* Check out the interlibrary loan item to your library's discard user. Discard instructions are available here: https://support.librariesofrsa.org/project/workflows-discard-user/

-- or --

Alternative method (not preferred): Delete the interlibrary loan item using the Delete Titles wizard if you know the override to access this wizard from the Special group in the Circulation+ module. Please email the RSA Help Desk at help@rsanfp.org if your library needs the override.

Instructions how to use the Delete Titles wizard are available here:
https://support.librariesofrsa.org/project/deleting-items-from-workflows/

These instructions are written in the context of using the Delete Titles wizard in the Cataloging module, but the instructions are the same when using this wizard in Circulation+.

You may see this warning when deleting the item:
> "This action will remove the item. There are bills associated with the item. No bills will be removed. Would you like to remove the item?"

Click "Yes" to delete the item from WorkFlows. You can continue to collect payments for bills that were associated with the deleted item. Deleted items that had associated bills will continue to display in patron accounts, but they no longer have item IDs.

3. Once the item is deleted or discarded from WorkFlows, you are ready to return it to the lending library.

List of available ILL item types

Contact the RSA Help Desk at help@rsanfp.org or 866-940-4083 if you would like any of these added to your Item Type drop down menu.

Item Type	Description
ILL	Interlibrary Loan outside RSA online
ILL-ALSA	ILL items from Academics in RAILS but not an RSA member
ILL-ALSO	ILL items from Specials/Other in RAILS but not an RSA member
ILL-ALSP	ILL items from Publics in RAILS but not an RSA member
ILL-ALSS	ILL items from Schools in RAILS but not an RSA member
ILL-FMI	ILL Items from Find More Illinois
ILL-ILIL	ILL items for libraries in ILL but outside of RAILS
ILL-IL-NRT	ILL items In-State that are Non-Returnable
ILL-US	ILL items for libraries in outside Illinois
ILL-US-BK	ILL books for libraries in outside Illinois
ILL-US-NRT	ILL items Out of State that are Non-Returnable