WINGS™ Request Management System

Version 2.1

Pigasus Software, Inc.

Solutions That Solve Problems

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Staff Guide

Revised November 15, 1999
Revised July 24, 2000

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Introduction

This guide is intended to be a quick overview of how to perform certain common functions. You will find that the WINGS system can do far more than is described here. For the most part, the actions are either self-explanatory or are covered by the Online Help (activated by pushing the ? buttons). Navigation through the system is horizontal by hotlink as well as vertical through a defined series of actions. Rather than give a screen-by-screen description of the system, this guide concentrates on the most common actions for a staff member, both on the lending and the borrowing (or responding and requesting) sides. Fuller technical detail is available in the Technical Guide.

Borrowing

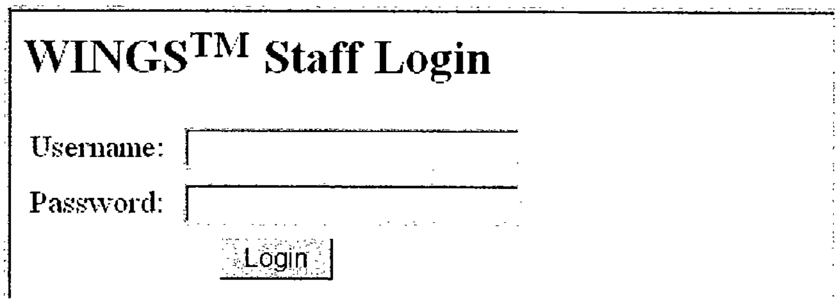
ILL practitioners perform two sets of duties: borrowing and lending. In this section of the guide, we will walk through some of the basic borrowing tasks and how they are performed in the WINGS system.

Note that the screens in this guide are generic Pigasus Software screens. Your library may well have changed both the appearance and function of some screens, but underlying logistics will remain the same.

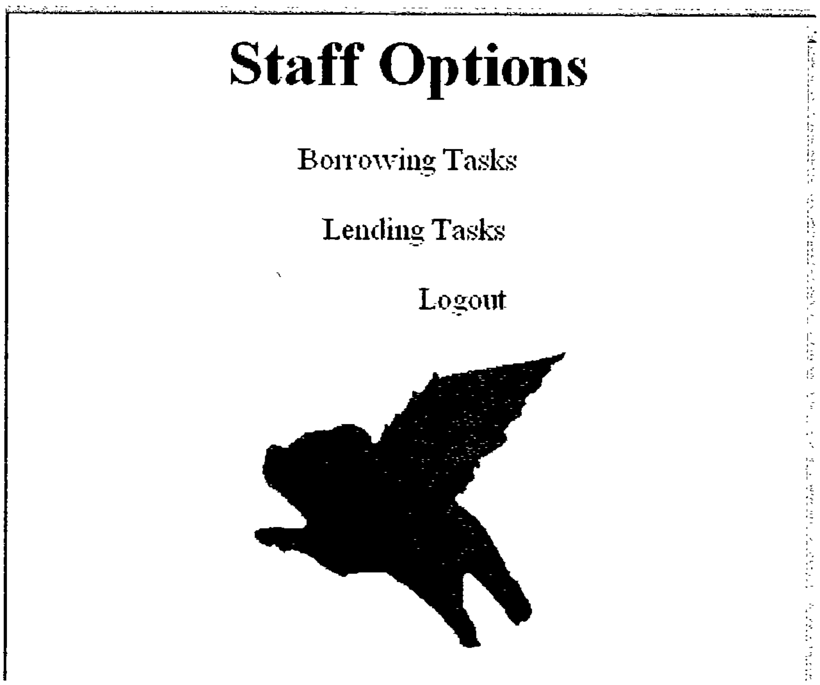
How do I log in as a borrowing staff member?

In order to use the WINGS system as a staff member, you must first log in. All staff members have a username and a password to allow them access to the WINGS system. This prevents unauthorized people from using the WINGS system.

Enter your staff username and password, and then click the Login button.



On the **Staff Options** page, click Borrowing Tasks.



You are now at the Borrowing Home Base. This is the main page for all tasks related to the borrowing role of ILL. Down the center are hotlinks to the various tasks. At the top you will find a logout hotlink and a hotlink that connects you to the Lending Home Base. The hotlinks on the borrowing side of the WINGS system are:

- Work Queues – this brings you to the queues into which all requests are divided according to their state.
- Requests – this brings you to a screen from which you can perform all tasks related to requests (creating requests for patrons, viewing a list of all requests, etc.)
- Citations – this brings you to a screen from which you can perform all tasks related to citation records (listing all citations, searching for citations, etc.)
- Reports – this brings you to a screen from which you can run reports on your ILL data.
- Patrons – this brings you to a screen from which you can perform all tasks related to the patron records (creating a new patron record, searching for a patron, editing a patron record, etc.)
- Trading Partners – this brings you to a screen from which you can set up and edit records of all the libraries and institutions from which you borrow.
- Tiers – this brings you to a screen from which you can create tiers of trading partners.
- Financial Records – this brings you to a screen from which you can look at all the financial records related to requests, and search for certain financial records.
- View Log – this brings you to a screen where you can see a log of messages related to requests or other activity in the WINGS system.

Borrowing - Home Base

[Logout] [Lender Home Base]

Work Queues

Requests

Citations

Reports

Patrons

Trading Partners

Tiers

Financial Records

View Log

How do I send requests to lending libraries?

Once a request is entered into the WINGS system by a patron or staff member, you will need to act on it, either by rejecting or approving it. Most often you will want to approve a request and send it to at least one lending library. If you send the request to multiple libraries at once, it is automatically routed from one library to the next.

At the Borrowing Staff Home Base, click the Work Queues hotlink. You will see a screen which displays a list of queues. Each queue contains all the WINGS system requests in a particular state, such as all the requests that are awaiting staff action, or items that are waiting to be returned to the lender. This screen also lists the total number of requests in each queue.

Borrowing - Work Queues

[Logout] [Borrower Home Base] [Lender Home Base] ?

NOTES from Trading Partner	[Read Notes]	11 requests
New Incoming Requests Needing Action	[New Requests]	29 requests
Requests Awaiting Reply From Supplier	[Answers Pending]	12 requests
Conditions Pending	[Conditions Pending]	0 conditions
Expected From Supplier	[Items Expected]	0 requests
Shipped by the Supplier	[Items Shipped]	5 requests
Loans Under Local Circulation Control	[Items Locally Checked Out]	1 requests
Items Overdue	[Overdue]	0 requests
Items Ready to be Returned to Supplier	[Return Items]	0 requests
Items Ready to Ship	[Ship]	0 requests
Unusual Review Needs	[Unusual Review]	0 requests

Click on the New Requests hotlink. The next screen you will see displays all the requests in the "Rev" (being reviewed) state. You can sort them in either ascending or descending order by request ID, creation date, patron name, article title (where applicable), or main title. This is done by selecting the desired sort field and order, then clicking the Refresh button. There are many hotlinks on this screen. Those at the top and bottom will link you to the Borrower Home Base, the main screen for acting on requests (Top of Requests), and the screen which lists all requests in any state. In the table there are hotlinks which will take you to the patron record (click on the patron's name), the citation record (click on either the article title or the larger title), and the request record (click on the request number in the Edit column).

Borrowing Request List

[Logout] [Borrower Home Base]
[Lender Home Base]

[Top of Requests] [Display All Requests] ?

Sort Field
Request ID
Date Created
Patron
Article Title
Title

Order
Ascending
Descending

Refresh
Refresh

29 Requests with State Rev

Select	Edit	Article Title	Larger Title	Date Created	Patron
☐	30071	*How to Install Home Theater*	Stereo Review	2000-07-07	Hargis, Steve
☐	30072		**Programming Perl**	2000-07-07	Hargis, Steve
☑	30076		**Foundation and Empire**	2000-07-08	Zemon, Art
☐	30083		**Winnie the Pooh**	2000-07-08	Bogar, Becky

You may choose to go to the full record in edit mode in order to use the QUEST Holdings links to search various catalogs for availability information on the requested item. If so, use the hotlink under the Edit column for the request you want to view. This will take you to the full Edit Request screen.

To approve one or more of these requests to be sent to a lending library, click the checkbox next to each request you wish to approve. Scroll to the bottom and click the Approve button.

☐	30212	*The 'New Economy': Prosperity Propaganda Riddled with Contradictions.*	**The-People; v.109 no.10 Jan 2000 p.1,7**	2000-07-11	Zemon, Candy
☑	30213	*Harnessing Information Technologies for the Environment.*	**State-of-the-World; 2000 p.121-141**	2000-07-11	Zemon, Candy
☐	30214	*Business: Financial Headlines: Environment: State's Mercury Levels Are 10th-Highest.*	**Detroit-Free-Press; 19 Nov 1999 p.1 secE**	2000-07-11	Zemon, Candy

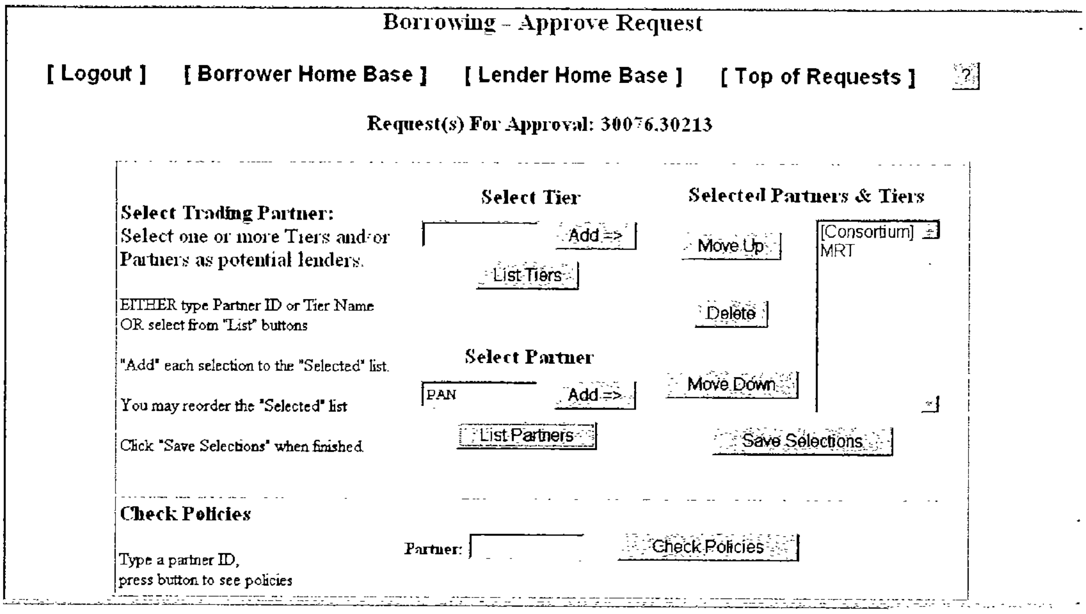
Act on Selected Request(s)

[Select All] [Clear Selections]

[Approve] [Cancel] [Reject] [Charges] [Other Responses]

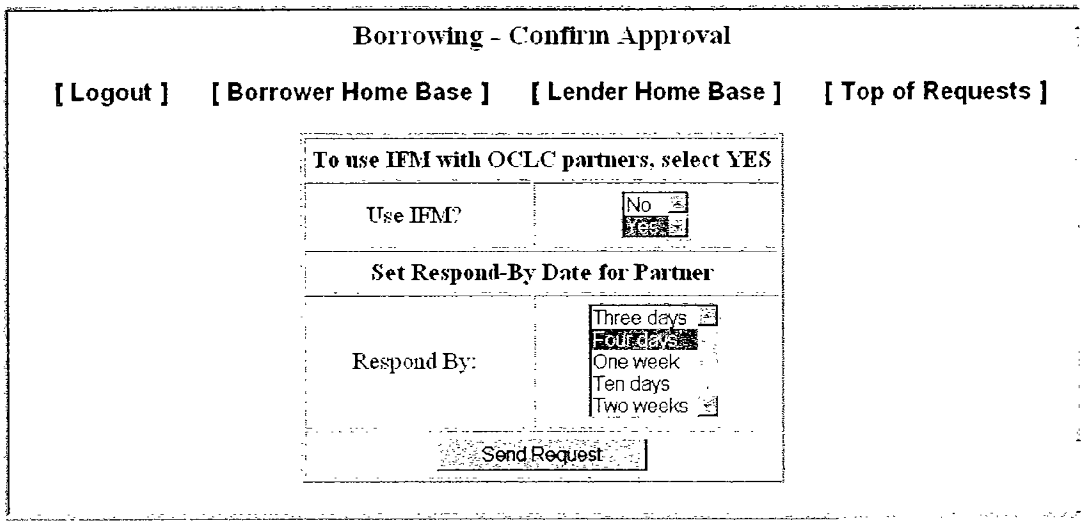
[Logout] [Borrower Home Base] [Lender Home Base] [Top of Requests]
[Display All Requests]

This next screen allows you to choose the institution or institutions to which you wish to send this request. You can send it to a pre-defined tier or string of institutions, to a single trading partner, or a combination. To select a tier, click the List Tiers button or type in the name of the tier. Click the Add button to add the tier to the list on the right. Do the same for any individual trading partners you wish to add. Tiers are distinguished from individual trading partners in the list by square brackets. In the example below, the staff member has chosen the tier named Consortium, the individual trading partner named MRT, and is about to add the individual trading partner named PAN. Once all the tiers and partners are in the list on the right, you may adjust their order by selecting one and clicking the Move Up and Move Down buttons. You may also remove a selection by selecting it and clicking the Delete button. If you need to check the policies of any trading partner, type its Partner ID in the field at the bottom and click the Check Policies button. When the selected tiers and partners are in the desired order, click the Save Selections button.



NOTE: Using tiers only works if all the potential lenders use some form of automatic electronic messaging ILL system. Trading partners using more primitive methods, such as free-text email or fax, should not be included in the lists and tiers. You may still communicate with them individually, but without an automatic electronic response from the partner, the WINGS system will be unable to move on to the next partner in the list.

The next screen lets you choose whether you would like to use IFM with any of the OCLC partners in your list. You will also need to select the respond-by date for each partner in the list. If a partner in the list has not responded to your request by the timeframe you define here, the request is sent to the next partner on the list. Click the Send Request button.



You will be given confirmation that your request has been sent. This confirmation table displays the title of the item, the title of the main work (where applicable), the request ID, and the next action that will be taken on this request. You will also see the order of the institutions to which each request will be sent. In our example, the tier named Consortium is listed first with its three members (Brandon, AHSL, and ucla) listed individually. Then MRT and PAN are listed. Since both are OCLC trading partners, they are automatically made into an OCLC lender string. From here you can log out, you can click on the Borrower Home Base hotlink to return to the home base, you can click on the Lender Home Base hotlink to go to the lending side of the WINGS system, or you can click on the Top of Requests hotlink to go to the main screen for requests.

Borrowing - Request(s) Sent

[Logout] [Borrower Home Base] [Lender Home Base] [Top of Requests]

Title	Larger Title	Request ID	Next Action
	Foundation and Empire	30076	Request will be sent
Harnessing Information Technologies for the Environment.	**State-of-the-World: 2000 p.121-141**	30213	Request will be sent

Trading partners to be used:

Request ID	Order	Trading Partner	Lender String (OCLC)
30076	1	Brandon	
30076	2	AHSL	
30076	3	ucla	
30076	4	OCLC	MRT PAN
30213	1	Brandon	
30213	2	AHSL	
30213	3	ucla	
30213	4	OCLC	MRT PAN

How do I create a request for a patron?

Depending on your library's policies, you may be creating requests on the behalf of patrons. Even in cases where patrons generally make their own requests, there will be occasions on which initial entry must be carried out by a staff member, such as when a patron makes a request by phone, free text email, or fax. Such requests will need to be entered into the WINGS system manually.

Go to the borrowing home base and click on the Requests hotlink. This will bring you to the main request screen. Click the Create button.

Borrowing - Requests

[Logout] [Borrower Home Base] [Lender Home Base]

Description	Action	Help
Search for Request(s)	Search	?
Create New Request	Create	?
View Borrower/Lender Systems' Request ID Numbers	Table	?
Edit, Cancel, Approve, Update a Request	Request No.: Act	?

Enter the barcode of the patron for whom you are requesting the item into the designated field. (If you want to check the number of active requests this patron has before you create a new request, click the Check Patron Request Limit button. You will see a screen which shows the number of active requests this patron has. Close the window when you are finished.) Select the type of request (borrow, document delivery, etc.), and click the corresponding button. For example, if your patron wants to borrow a returnable item, click the Borrow button.

Borrowing - Select New Request Type

[Logout] [Borrower Home Base] [Lender Home Base] [Top of Requests]

For Patron (Barcode):		Check Patron Request Limit
Borrow	Borrow a Returnable Item	?
Purchase	Request a Purchase Be Made	?
Document Delivery	Buy a Nonreturnable from a Document Supplier	?
Photocopy	Obtain a Photocopy from a Library	?
Information/Subject	Question or Subject Request	?

On this screen you will enter all the information you know about the request. The top part of the screen will let you enter citation information, as well as any standard numbers this item may have.

Borrowing - New Borrow Request

[Logout] [Borrower Home Base] [Lender Home Base] [Top of Requests] ?

Basic Information

Required - TITLE: I'm a Stranger Here Myself

Author: Bryson, Bill

Publisher:

Date Published: 1999

Volume Name/Number:

Call Number:

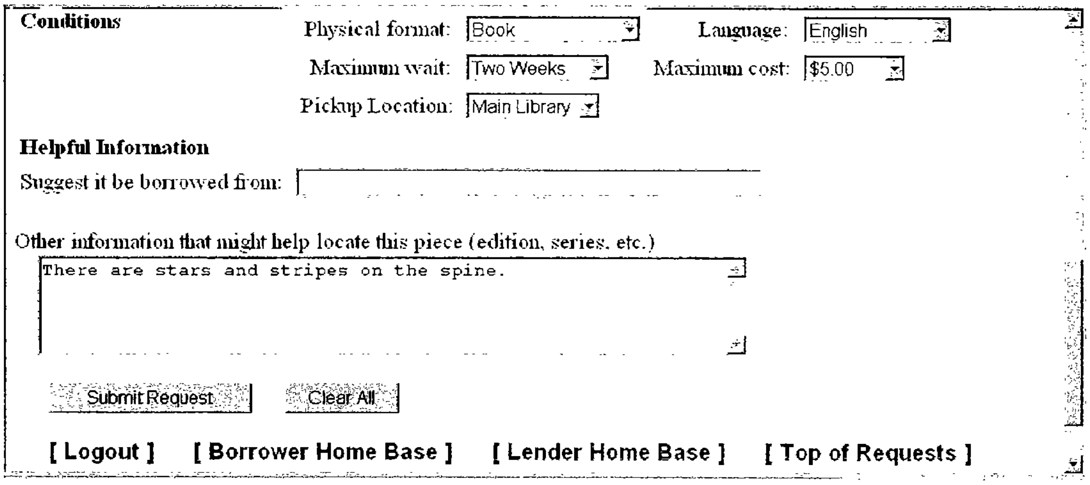
Standard Numbers: ISBN: ISSN:

LOC

RLIN

OCLC

Scroll down and you will be given the opportunity to set conditions for the request. You can also enter any helpful information, or suggest where the item may be found. When you have finished entering information, click the Submit Request button.


Conditions

Physical format: Book
Language: English
Maximum wait: Two Weeks
Maximum cost: $5.00
Pickup Location: Main Library

Helpful Information

Suggest it be borrowed from:

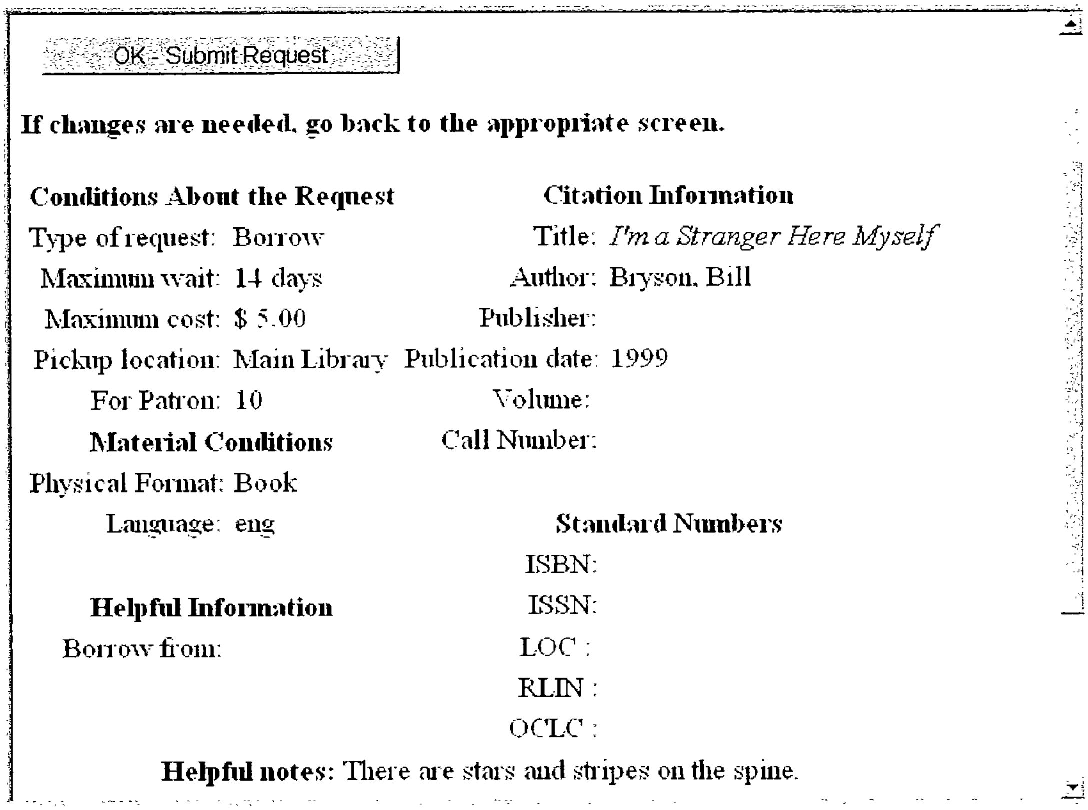
Other information that might help locate this piece (edition, series, etc.)

There are stars and stripes on the spine.

Submit Request | Clear All

[Logout] [Borrower Home Base] [Lender Home Base] [Top of Requests]

Next you will come to a screen at which you can confirm all information about the request. If you need to change any of this information, use your browser's Back button to go back to the screen where you need to make changes. When everything is satisfactory, click OK.



OK - Submit Request

If changes are needed, go back to the appropriate screen.

Conditions About the Request

Type of request: Borrow
Maximum wait: 14 days
Maximum cost: $ 5.00
Pickup location: Main Library
For Patron: 10

Material Conditions

Physical Format: Book
Language: eng

Helpful Information

Borrow from:

Citation Information

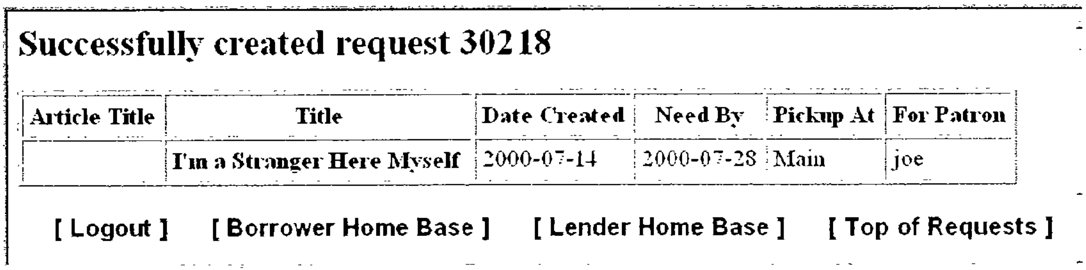
Title: *I'm a Stranger Here Myself*
Author: Bryson, Bill
Publisher:
Publication date: 1999
Volume:
Call Number:

Standard Numbers

ISBN:
ISSN:
LOC :
RLIN :
OCLC :

Helpful notes: There are stars and stripes on the spine.

You will then be given confirmation that the request was successfully created for the patron. You may enter more requests by clicking Top of Requests, or you may return to the Borrower Home Base. You may also log out or go to the lending side of the WINGS system.



Successfully created request 30218

Article Title	Title	Date Created	Need By	Pickup At	For Patron
	I'm a Stranger Here Myself	2000-07-14	2000-07-28	Main	joe

[Logout] [Borrower Home Base] [Lender Home Base] [Top of Requests]

How do I look at a list of all active requests?

When viewing a list of all active requests, you can do a number of things: you can act on the requests, you can sort them according to various criteria (author, title, request ID, etc.), and you can find requests in the list. Also, if you are seeking particular requests and know neither their request numbers nor their current state, a list of active requests or a search on a particular field may be the quickest way to find the desired requests.

Go to the borrowing home base and click the Requests hotlink. This will bring you to the main screen for requests. Click the Search button.

Borrowing - Requests

[Logout]   [Borrower Home Base]   [Lender Home Base]

Description	Action	Help
Search for Request(s)	Search	?
Create New Request	Create	?
View Borrower/Lender Systems' Request ID Numbers	Table	?
Edit, Cancel, Approve, Update a Request	Request No.: Act	?

This will bring you to the search screen. From here you can search for a specific request using a number of different criteria (title, patron, etc.). To see a list of all active requests, click the Active button.

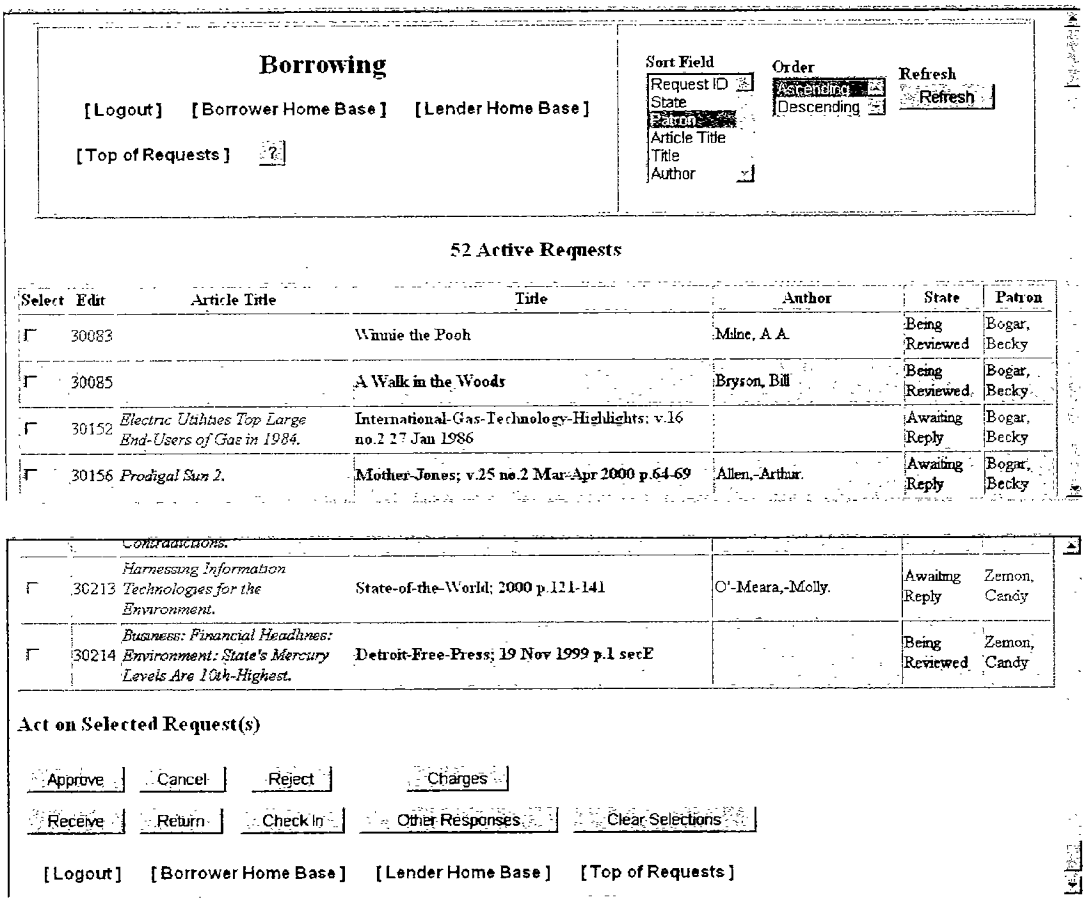
NOTE: Depending on how your library's database is set up, the search may be case-sensitive.

Borrowing - Lists of Requests

[Logout] **[Borrower Home Base]** **[Lender Home Base]** **[Top of Requests]** ?

Description	Action	Desired Information
List All Active Requests	Active	
Search By ACTIVE State/Status	Find	ACTIVE State/Status: Awaiting Reply
List All Closed Requests	Closed	
Search By CLOSED State/Status	Find	CLOSED State/Status: Canceled
Search By Title	Find	Title:
Search By Article Title	Find	Article Title:
Search By Author	Find	Author (last name first):
Search By Patron	Find	Name (last name first):

You will then see a list of all the active requests meeting the criteria of your search, with hotlinks to the patron record (click on the patron's name), the citation record (click on the title or article title), and the request record (click on the request ID number in the Edit column).



Select	Edit	Article Title	Title	Author	State	Patron
☐	30083		Winnie the Pooh	Milne, A A	Being Reviewed	Bogar, Becky
☐	30085		A Walk in the Woods	Bryson, Bill	Being Reviewed	Bogar, Becky
☐	30152	*Electric Utilities Top Large End-Users of Gas in 1984.*	International-Gas-Technology-Highlights; v.16 no.2 27 Jan 1986		Awaiting Reply	Bogar, Becky
☐	30156	*Prodigal Sun 2.*	Mother-Jones; v.25 no.2 Mar-Apr 2000 p.64-69	Allen,-Arthur.	Awaiting Reply	Bogar, Becky
		Contradictions.				
☐	30213	*Harnessing Information Technologies for the Environment.*	State-of-the-World; 2000 p.121-141	O'-Meara,-Molly.	Awaiting Reply	Zemon, Candy
☐	30214	*Business: Financial Headlines: Environment: State's Mercury Levels Are 10th-Highest.*	Detroit-Free-Press; 19 Nov 1999 p.1 secE		Being Reviewed	Zemon, Candy

To act on one of these requests, check the checkbox and click on the button at the bottom of the screen which corresponds with the type of action you wish to take. To return to the borrowing home base, click on the Borrower Home Base hotlink.

To resort the list of requests, select the desired sort field and order at the top of the screen, and click the Refresh button. Sorting requests makes it much easier to find them in the list.

How do I cancel a request?

On occasion you may want to cancel a request, either at a patron's bidding or your own judgement. This section will show you how to do it. The difference between canceling and rejecting a request lies largely in the reasons for doing so. Canceling generally occurs because a need expires. Rejecting generally occurs for policy or data-related reasons.

There are many places from which you can cancel a request. Any screen in which you see a list of requests with checkboxes next to them also contains a row of buttons at the bottom of the screen. These buttons represent actions you can take on a request. One of the buttons is a Cancel button. Click the checkbox next to the request and then click the Cancel button. You will be given an opportunity to explain why you are canceling the request by choosing a reason from a dropdown. You may also add any additional notes in the comments field. Click OK.

NOTE: The Cancel button will only appear under lists of requests whose state makes it possible to cancel. For example, if you were looking at a list of closed requests, the Cancel button would not appear with the buttons at the bottom of the screen.

☐	30110	*Body image and disordered eating among Asian American and Caucasian college students: An examination of race and gender differences.*	Psychology-of-Women-Quarterly. 1999 Dec; Vol 23(4): 781-796	2000-07-09	Zemon, Art
☑	30152	*Electric Utilities Top Large End-Users of Gas in 1984.*	International-Gas-Technology-Highlights; v.16 no.2 27 Jan 1986	2000-07-10	Bogar, Becky
☐	30156	*Prodigal Sun 2.*	Mother-Jones; v.25 no.2 Mar-Apr 2000 p.64-69	2000-07-10	Bogar, Becky
☑	30196		Poolside	2000-07-10	Hargis, Steve
☐	30213	*Harnessing Information Technologies for the Environment.*	State-of-the-World; 2000 p.121-141	2000-07-11	Zemon, Candy

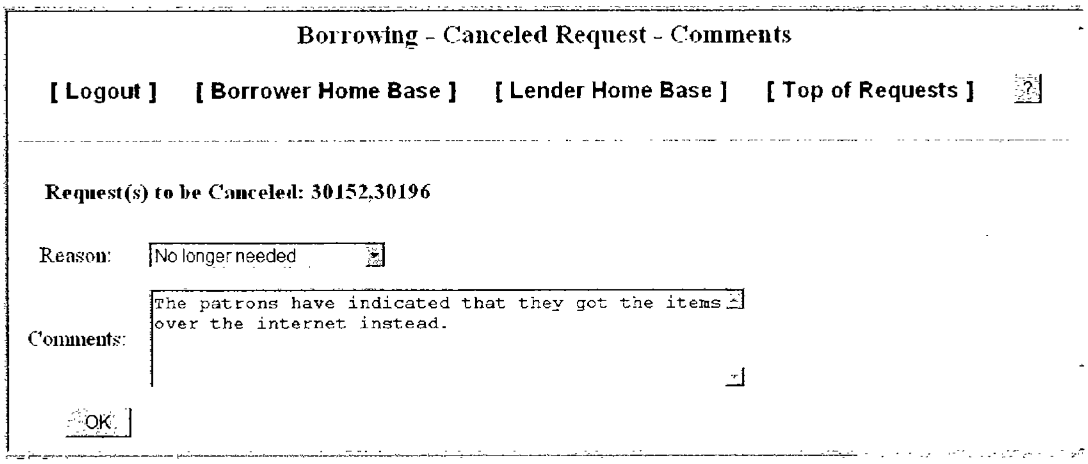
Act on Selected Request(s)

[Select All] [Clear Selections]

[Cancel] [Reject] [Charges] [Receive] [Other Responses]

[Logout] [Borrower Home Base] [Lender Home Base] [Top of Requests] [Display All Requests]

Another way to cancel the request is to go into the request record. From the screen above, click on the request ID number in the Edit column. Once you are in the request record, scroll to the bottom and click the Cancel button. You will be given the opportunity to explain why you are canceling the request by choosing a reason from a dropdown and then adding any additional notes in the comments field. Click OK.



A request can be cancelled only up to a certain point in its life cycle; after the lending library has sent the item, you may not cancel the request.

How do I enter a new patron into the WINGS system?

You will need to add new patrons to the WINGS system if they have just joined the library, gained ILL privileges, etc. The following section will show you how to do this. Note that, depending on your library's decisions and options, the WINGS system may be using your ILS patron database or a subset of the ILS patron data loaded into internal WINGS system patron database. The WINGS system needs relatively little information about patrons. Serious work on patron records should be done in your ILS patron file.

Go to the Borrowing Home Base and click on the Patrons hotlink. This will bring you to the main screen for all tasks related to patrons.

Borrowing - Patron Records

[Logout] [Borrower Home Base] [Lender Home Base] ?

Description	Action	Desired Information
List All Patrons	List	
Search for Patron(s)	Find	
Create a New Patron Record	New	
Select Patron By Exact Barcode	Edit	Barcode:
Select Patron By Exact Username	Edit	Username:
Select Patron By Exact Patron Database ID	Edit	Patron ID:

Click the New button.

The next screen will allow you to enter information about the patron. You will need to fill in the following fields:

- Type of Patron – whether the patron is a student, faculty member, trustee, etc.
- Username – the username the patron will use when logging into the WINGS system
- Pass Phrase – the secret pass phrase the patron will use to log in
- Barcode – the patron's barcode
- Location Where Registered – where the patron is registered
- Name – the patron's full name
- Email Address – the patron's email address, if applicable
- Phone Number – the patron's phone number
- Shipping Address – if the patron is eligible to have things shipped to her, this is the address to which they should be sent
- Billing Address – if the library sends out invoices, this is the address to which the patron's bills should be sent
- Local Fields – if your library keeps any other specific local information about the patron, these fields can be used to store that information.

When you are finished, click OK.

Borrowing - New Patron Record

[Logout] [Borrower Home Base] [Lender Home Base] [Top of Patrons] ?

Library-Related Information

Type of Patron: Regular

Username: mhenry

Pass Phrase: *****

Barcode: 4591984

Location Where Registered: Main Library

Patron Name

Enter names consistently, last name first: Henry, Maude

Contact Information

E-mail address: maude@henry.com

Phone number: 555-9843

Shipping address: 249 Sunnyside Street
Henryville, TX 83203

Billing address: 4294 Commerce Blvd.
Worktown, TX 82853

Local Fields

Local Field 1: W 555-8375

Local Field 2:

Local Field 3:

OK Clear All

[Logout] [Borrower Home Base] [Lender Home Base]

At the confirmation screen, make sure all the information is correct. If it isn't, use your browser's Back button to go back and make changes. When everything is correct, click OK.

Borrowing - Confirm New Patron Record

[Logout] [Borrower Home Base] [Lender Home Base] [Top of Patrons]

OK -Submit Patron Record

If Changes are Needed, Go Back To Previous Screen

Location where Registered:	1
Patron Type:	101
Username:	mhenry
Barcode:	4591984
Pass Phrase:	henry
Name:	Henry, Maude
E-mail Address:	maude@henry.com
Phone Number:	555-9843
Shipping Address:	249 Sunnyside Street Henryville, TX 83203
Billing Address:	4294 Commerce Blvd. Worktown, TX 82853
Local Field 1:	W 555-8375

You will then be given confirmation that the patron has been successfully created.

Successfully created Patron 1012

Patron Name	Barcode	Date Created	Username
Henry, Maude	4591984	2000-07-17	mhenry

[Logout] [Borrower Home Base] [Lender Home Base] [Top of Patrons]

How do I view a list of the libraries from which we borrow?

At times, you will want to enter new information about libraries and suppliers with which your library has a relationship; you may also wish to revise existing information about these relationships. The WINGS system calls these entities Trading Partners. This is how to navigate with Trading Partner records.

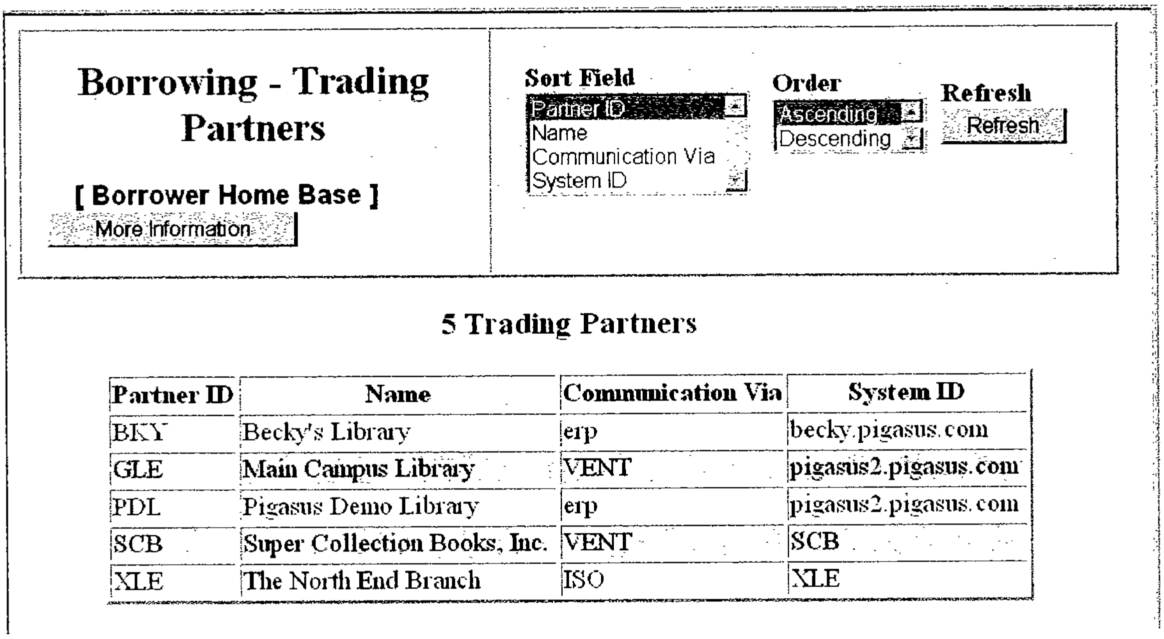
Go to the Borrowing Home Base and click on the Trading Partners hotlink. You will arrive at the main screen for all tasks related to trading partners.

Borrowing - Trading Partners

[Logout] [Borrower Home Base] [Lender Home Base] ?

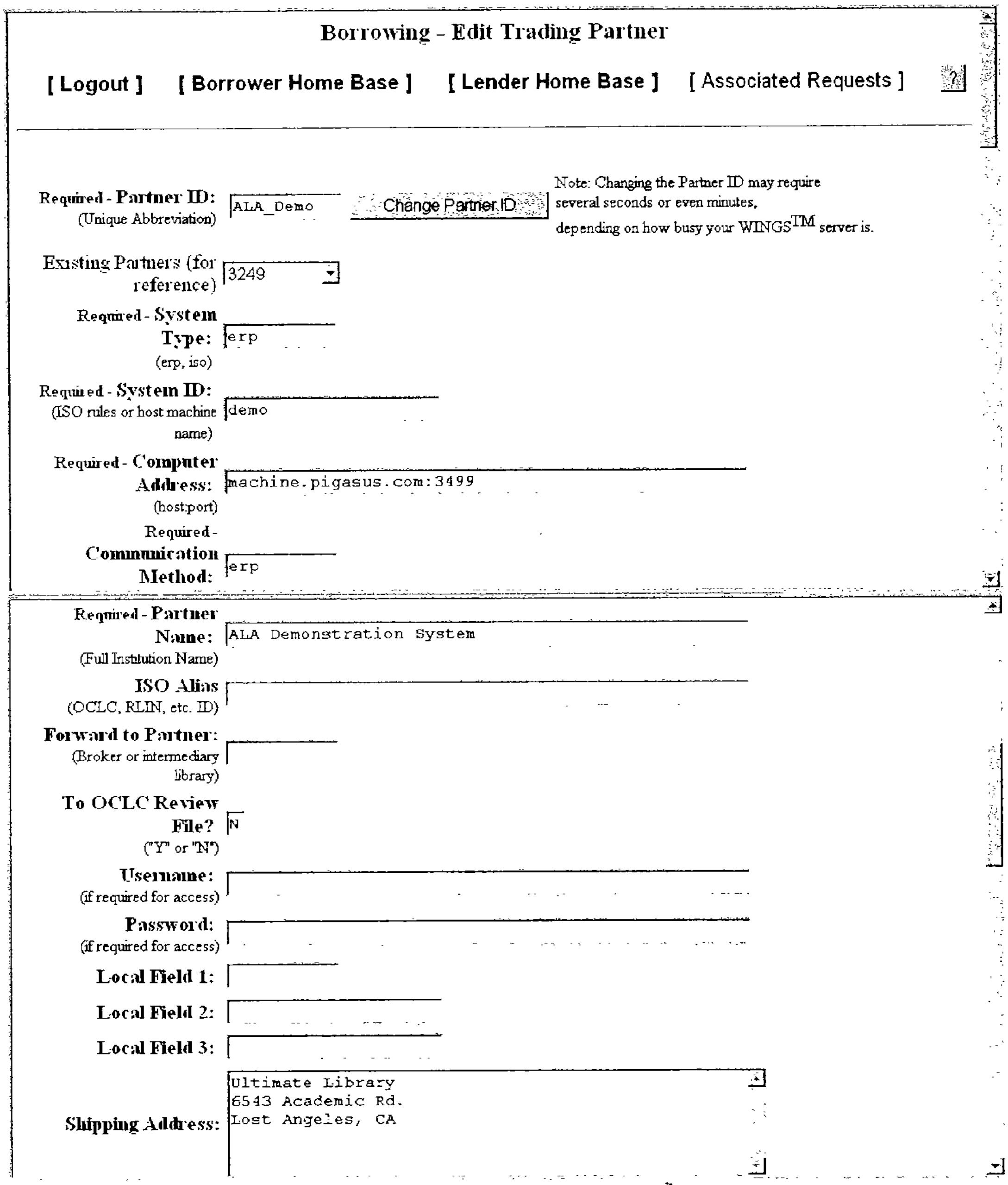
Description	Action	Desired Information
List All Trading Partners	List	
Create New Trading Partner	New	
Edit Existing Trading Partner	Edit	Exact Partner ID:
Search Partners by Name	Find	Name:
Search Partners by Partner ID	Find	Partner ID:
Search Partners by System ID	Find	System ID:
Search Partners by Communication Method	Find	Extended Request Protocol

Click the List button in order to see a list of all your trading partners. The next screen will list them all. You can sort them as you see fit. This is done by selecting the desired sort field and order and then clicking the Refresh button.



Partner ID	Name	Communication Via	System ID
BKY	Becky's Library	erp	becky.pigasus.com
GLE	Main Campus Library	VENT	pigasus2.pigasus.com
PDL	Pigasus Demo Library	erp	pigasus2.pigasus.com
SCB	Super Collection Books, Inc.	VENT	SCB
XLE	The North End Branch	ISO	XLE

Clicking on a trading partner's ID will bring you to that partner's record, which you can edit if necessary.


Borrowing - Edit Trading Partner

[Logout] [Borrower Home Base] [Lender Home Base] [Associated Requests]

Required - Partner ID: (Unique Abbreviation)	ALA_Demo	Change Partner ID — Note: Changing the Partner ID may require several seconds or even minutes, depending on how busy your WINGS™ server is.
Existing Partners (for reference)	3249	
Required - System Type: (erp, iso)	erp	
Required - System ID: (ISO rules or host machine name)	demo	
Required - Computer Address: (host:port)	machine.pigasus.com:3499	
Required - Communication Method:	erp	
Required - Partner Name: (Full Institution Name)	ALA Demonstration System	
ISO Alias (OCLC, RLIN, etc. ID)		
Forward to Partner: (Broker or intermediary library)		
To OCLC Review File? ("Y" or "N")	N	
Username: (if required for access)		
Password: (if required for access)		
Local Field 1:		
Local Field 2:		
Local Field 3:		
Shipping Address:	Ultimate Library 6543 Academic Rd. Lost Angeles, CA	

Billing address:	Ultimate Library 6543 Academic Rd. Lost Angeles, CA
Contact/Policy Information: Save Changes	Fax: 384-555-3232 Electronic: Ariel: Contact: name & phone: Mark Twain, fax & email: , sam@hannibal.com

How do I run a report?

Since the WINGS system collects data every time any action is made on a request, there are a number of standard reports that can be run on this data. Your library may choose to build additional reports and to list them either on this page or another. Printing the resulting report is as easy as hitting the PRINT button on your browser.

Go to the Borrowing Home Base and click on the Reports hotlink. This will bring up a screen with all the reports available to your library. NOTE: report types will vary from library to library.

Borrower Reports

Select One Report

- Charges by Patron
- Charges by Type (Detail)
- Charges by Type (Summary)
- Copyright Usage Report
- Fill Rate By Trading Partner
- Invoice Summary Data by Patron
- Lender and Borrower Charges by Type
- Requests by Patron and State
- Requests by State
- Requests by Type and Pick-Up Location
- Requests by Type and Trading Partner
- Turnaround Time by Trading Partner

Specify Date Range

01/01/1999 through 07/17/2000

Format: mm/dd/yyyy

Generate Report

[Logout] **[Borrower Home Base]** **[Lender Home Base]**

Click the radio button next to the report you wish to run, adjust the date fields to represent the time span in which you are interested, and then click the Generate Report button. Scroll down; the results will be displayed below.

Copyright Statistics by Pub Title

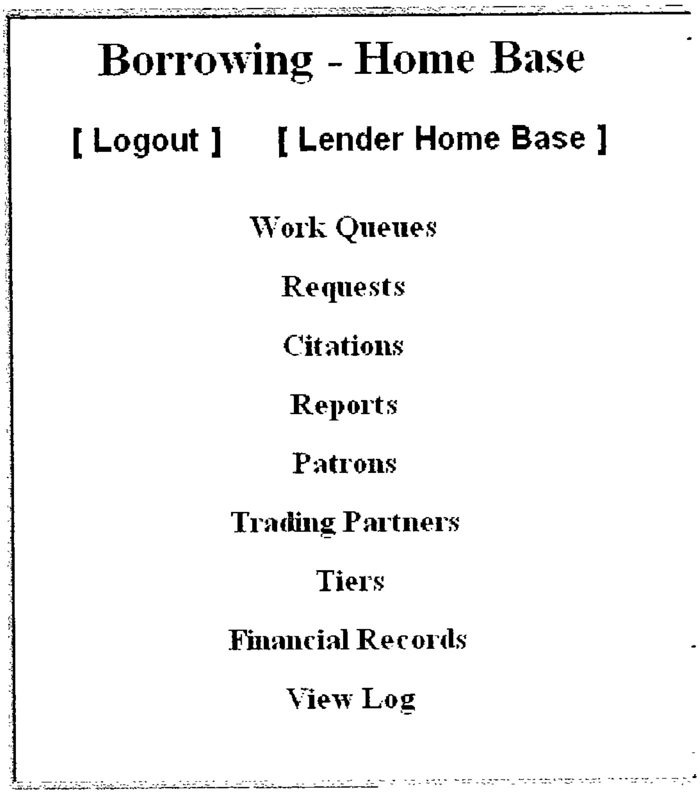
Date Range: 01/01/1999 - 07/17/2000

Pub Title	Volume	Pages	Quantity
			10
Acta-Agriculturae-Boreali-Sinica (China). Huabei Nongxuebao (China). (Aug 1998). v. 13(suppl.) p. 50-55.			1
American-Journalism-Review; v.22 no.2 Mar 2000 p.22-29			4
American-School-Board-Journal; v.187 no.4 Apr 2000 p.16,18			4
Analytica-Chimica-Acta. Jan. 24, 2000; 405 (1-2): 185-190.			1
Biologia (Slovak Republic). Section Cellular and Molecular Biology. (Dec 1999). v. 54(6) p. 661-666.			1
Biologia (Slovak Republic). Section Cellular and Molecular Biology. (Jun 1999). v. 54(3) p. 303-308.			1
Bromatologia-i-Chemia-Toksykologiczna. 1999; 32 (3): 239-245			1
Bromatologia-i-Chemia-Toksykologiczna. 1999; 32 (3): 247-251.			1

What do I do when I receive a number of items from lending libraries at once?

When you receive a number of requested items at once, you can check them into local control as a batch, rather than checking them in individually.

From the Borrower Home Base, click on the Work Queues link.



You will arrive at the list of queues. Click on the "Items Shipped" link to see the list of items which have been shipped from the lender/supplier.

Borrowing - Work Queues

[Logout] **[Borrower Home Base]** **[Lender Home Base]** ?

NOTES from Trading Partner	[Read Notes]	11 requests
New Incoming Requests Needing Action	[New Requests]	29 requests
Requests Awaiting Reply From Supplier	[Answers Pending]	12 requests
Conditions Pending	[Conditions Pending]	0 conditions
Expected From Supplier	[Items Expected]	0 requests
Shipped by the Supplier	[Items Shipped]	5 requests
Loans Under Local Circulation Control	[Items Locally Checked Out]	1 requests
Items Overdue	[Overdue]	0 requests
Items Ready to be Returned to Supplier	[Return Items]	0 requests
Items Ready to Ship	[Ship]	0 requests
Unusual Review Needs	[Unusual Review]	0 requests

You will now see a list of all the items which have been shipped to your library. Check the checkboxes of all the items you have received, and click the Receive button.

Borrowing Request List

[Logout] **[Borrower Home Base]** **[Lender Home Base]**

[Top of Requests] **[Display All Requests]** ?

Sort Field: Request ID, Date Created, Patron, Article Title, Title

Order: Ascending, Descending

Refresh: Refresh

5 Requests with State Sent

Select	Edit	Article Title	Larger Title	Date Created	Patron
☐	1013	*Testing a new system*	**How to manage frustration**	2000-06-15	Stewart, Patrick
☑	30002		**oe req 3**	2000-06-16	Stewart, Patrick
☐	30003		**oe req 5**	2000-06-16	Stewart, Patrick
☑	30011		**oe req 8**	2000-06-16	Stewart, Patrick
☑	30043	*June 28 Title1*	**Journal of June 28, 1**	2000-06-28	Stewart, Patrick

Act on Selected Request(s)

Select All | Clear Selections

Charges | Receive | Other Responses

The final screen confirms that you have received the items, and that the appropriate message has been sent to the lending institutions. Note that there are two different lending institutions involved here. You may receive as many items as you like at one time, regardless of who sent them to you.

Successfully updated request(s) 30002,30011,30043

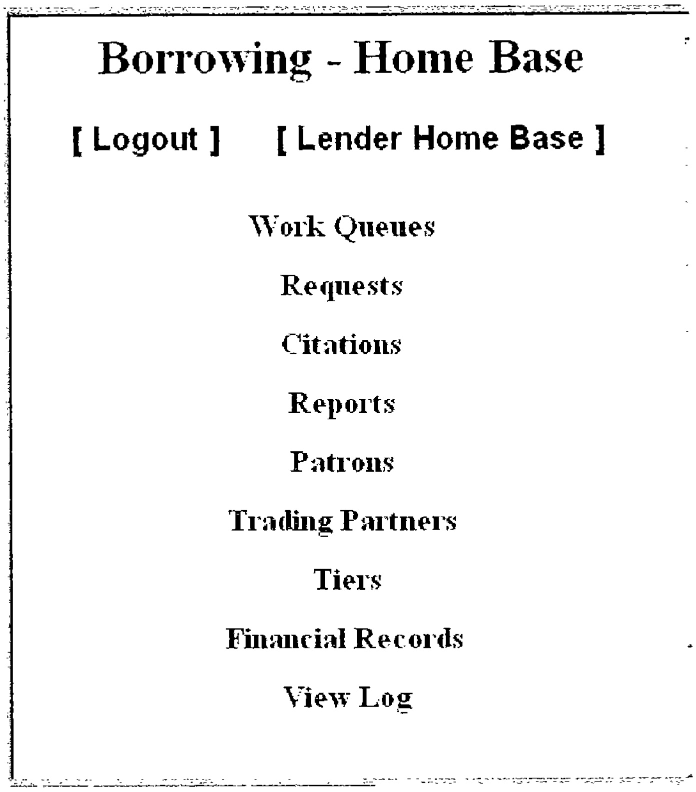
Article Title	Title	Request ID	Next Action
	oe req 3	30002	Received Message will be sent to institution ucla
	oe req 8	30011	Received Message will be sent to institution ucla
June 28 Title1	**Journal of June 28, 1**	30043	Received Message will be sent to institution MRT

[Logout] **[Borrower Home Base]** **[Lender Home Base]** **[Top of Requests]**

How do I set up an OCLC trading partner?

You may need to communicate with one or more of your trading partners through OCLC. To do this, you will actually need to set up two trading partners. One is for the library you wish to talk to, and the other is used to communicate with OCLC.

From the Borrower Home Base, click on the Trading Partners link.



From the Trading Partners screen, click the New button to create a new trading partner.

Borrowing - Trading Partners

[Logout] **[Borrower Home Base]** **[Lender Home Base]** ?

Description	Action	Desired Information
List All Trading Partners	List	
Create New Trading Partner	New	
Edit Existing Trading Partner	Edit	Exact Partner ID:
Search Partners by Name	Find	Name:
Search Partners by Partner ID	Find	Partner ID:
Search Partners by System ID	Find	System ID:
Search Partners by Communication Method	Find	Extended Request Protocol

Here is how to set up the main OCLC trading partner using the Trading Partner user interface. The values in italics are ones you will need to obtain from OCLC: domain, port, RequesterID, authorization, and password.

- Partner ID: `OCLC`
- System Type: `iso`
- System ID: `oclc:ill@oclc`
- Computer Address: *`domain:port`*
- Communication Method: `oclc`
- Partner Name: `OCLC main record` (or something along those lines)
- ISO Alias: *`RequesterID`*
- Username: *`authorization`*
- Password: *`password`*

You may leave all the other fields blank.

Now you will want to set up the individual trading partners that will communicate through this OCLC trading partner. Below are the settings for a fictional library called "Library" with the partner ID "LIB". Note that the only different values between this trading partner and the main OCLC trading partner are the Partner ID, System ID, and the Partner Name.

- Partner ID: `LIB`
- System Type: `iso`
- System ID: `OCLC:LIB`
- Computer Address: *`domain:port`*
- Communication Method: `oclc`
- Partner Name: `Library`

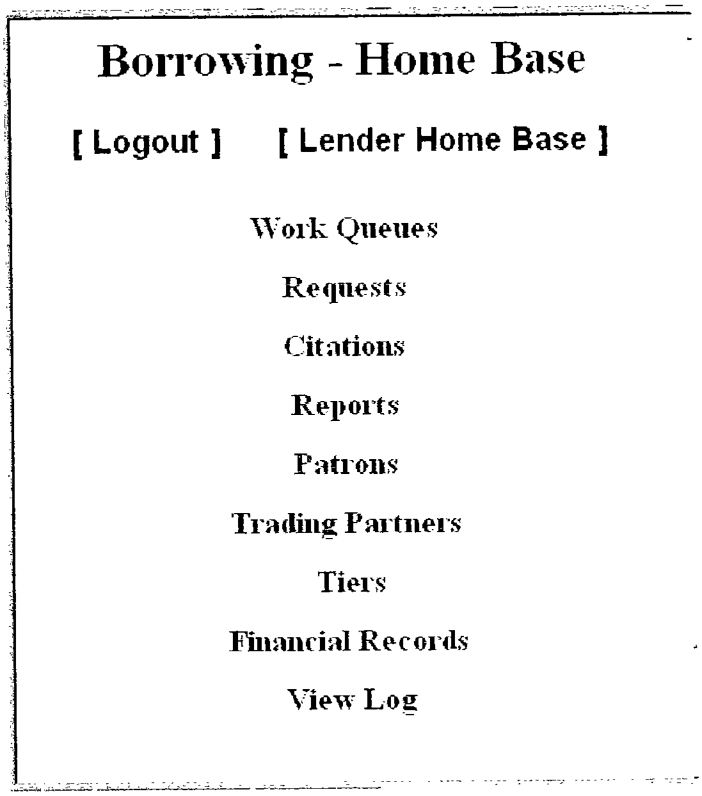
- ISO Alias: `RequesterID`
- Username: `authorization`
- Password: `password`

You may also wish to enter the billing and shipping address for your partner. Any additional OCLC trading partners should be set up as LIB is set up here; you must not create the main OCLC trading partner more than once. When you approve a request, you will select the individual trading partner or tier, not the main OCLC record.

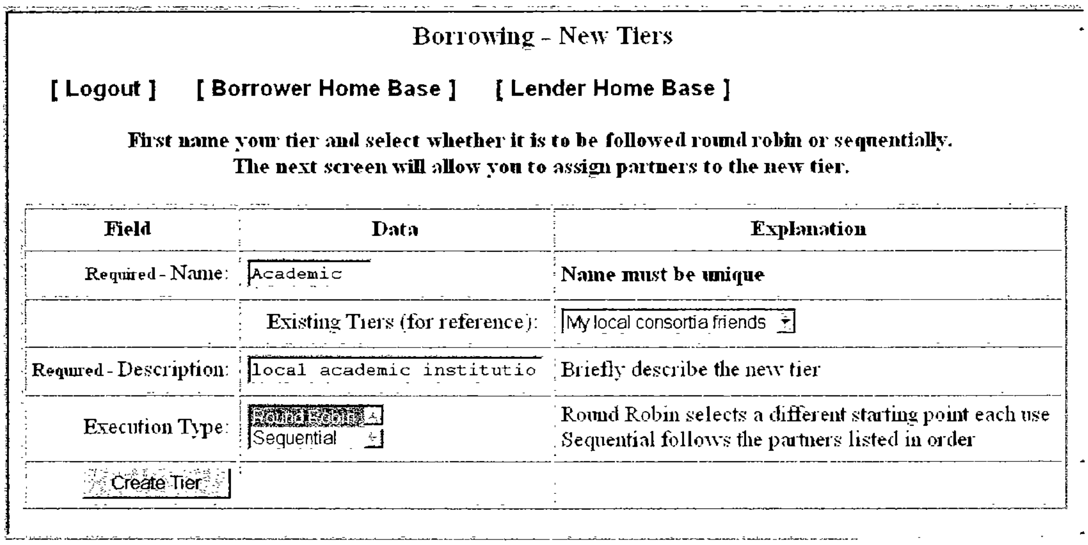
How do I create a tier?

If you always send your requests to the same group of lenders, you may wish to set up a tier, or list of potential lenders. Then when you approve a request to be sent to that tier, the request will be automatically routed from one partner to the next until someone responds that they will lend the item. Tiers can be set up sequentially or round robin.

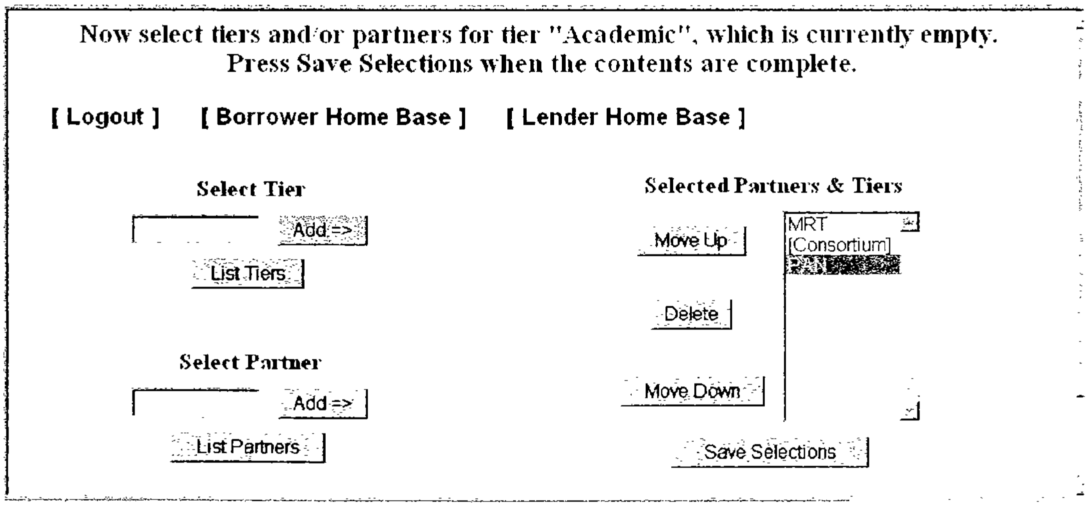
From the Borrowing Home Base, click the Tiers hotlink.



The next screen allows you to name your tier and briefly describe it. Here you will also choose whether you want the tier to work sequentially or in a round robin method. There is a list of existing tiers to refer to when naming the new one. Click the Create Tier button.



Now you will populate your tier. You may put individual trading partners or preexisting tiers into your new tier. Click the List Tiers and List Partners buttons to select which tiers and partners you would like to be in your new tier. Click the Add button to add them to the list. You may change the order of the list by selecting tiers or partners and clicking the Move Up, Move Down, or Delete buttons. Note that the tiers are distinguished from the individual partners by square brackets. When the list is in the order you would like it, click Save Selections.



The next screen shows you the final tier. The trading partners are all listed, even the ones inside the Consortium tier. In this example, when you approve a request to go to the Academic tier, it will go to the individual trading partner MRT first, then to each of the members of the Consortium tier in order, and then to the individual partner PAN. Since we set the Academic tier up as a round robin tier, the next time you send a request to the Academic tier it will start with the first member of the Consortium tier, and so on.

Borrowing - Tier Contents

[Logout] [Borrower Home Base] [Lender Home Base] [Top of Requests]

Contents of new tier 'Academic'

Order	Partner Name
1	MRT
2	Brandon
3	AHSL
4	ucla
5	PAN

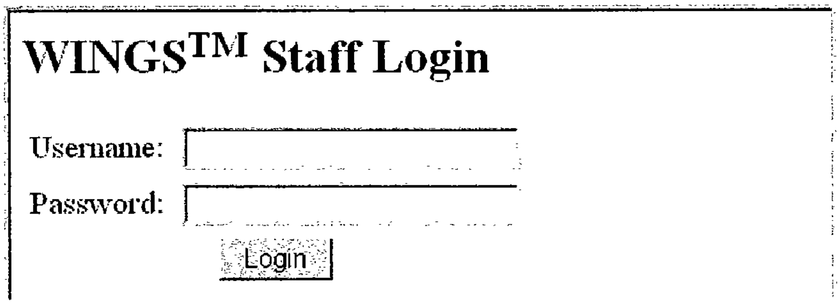
Lending

The other half of ILL is lending. This section of the guide will walk you through some basic lending tasks.

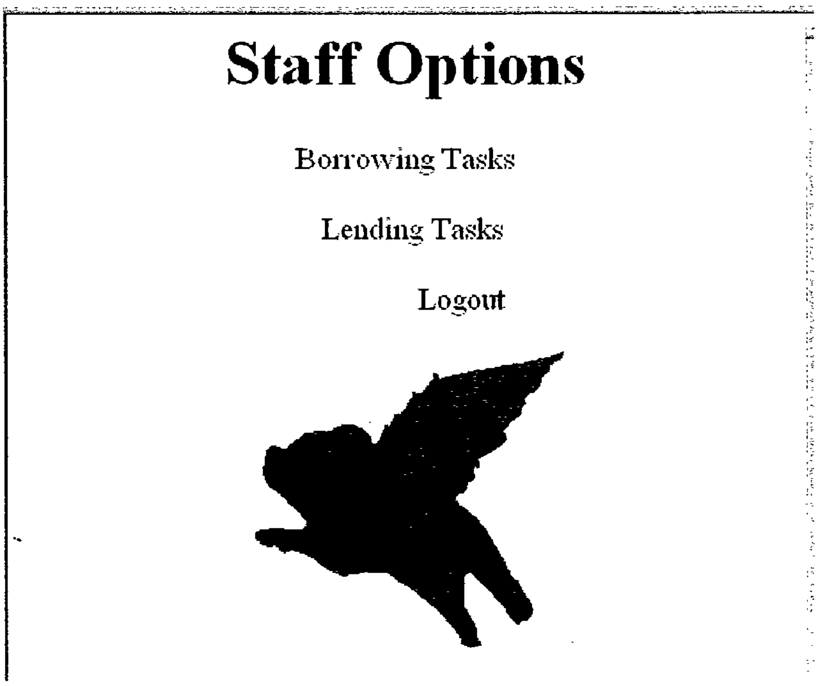
How do I log in as a lending staff member?

In order to use the WINGS system as a staff member, you must first log in. Each staff member has a username and a password to allow them access to the WINGS system. This prevents unauthorized people from using the WINGS system.

Enter your staff username and password. Click the Login button.

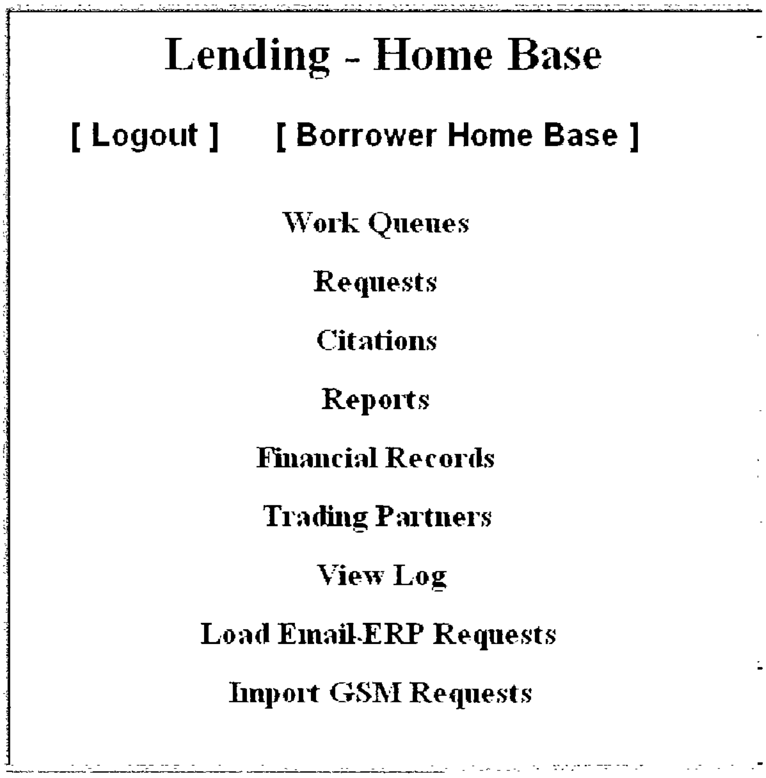


On the **Staff Options** page, click Lending Tasks.



This will bring you to the Lending Home Base. This is the main page for all tasks related to the lending side of ILL. Down the center are hotlinks to the various tasks. At the top you will find a button linking you to the Borrowing Home Base, as well as a logout button.

- Work Queues – this brings you to the queues into which all requests are divided according to their state.
- Requests – this brings you to a screen from which you can perform all tasks related to requests (creating requests for patrons, viewing a list of all requests, etc.)
- Citations – this brings you to a screen from which you can perform all tasks related to citation records (listing all citations, searching for citations, etc.)
- Reports – this brings you to a screen from which you can run reports on your ILL data.
- Financial Records – this brings you to a screen from which you can look at all the financial records related to requests, and search for certain financial records.
- Trading Partners – this brings you to a screen from which you can set up and edit records of all the libraries and institutions from which you borrow.
- View Log – this brings you to a screen where you can see a log of messages not related to requests (patron created, citation updated, etc.)
- Load Email ERP Requests – this imports any requests you may have received in the ERP email format.
- Import GSM Requests – this imports any requests you may have received in the GSM email format.



How do I look at a list of all new requests which have come into my library?

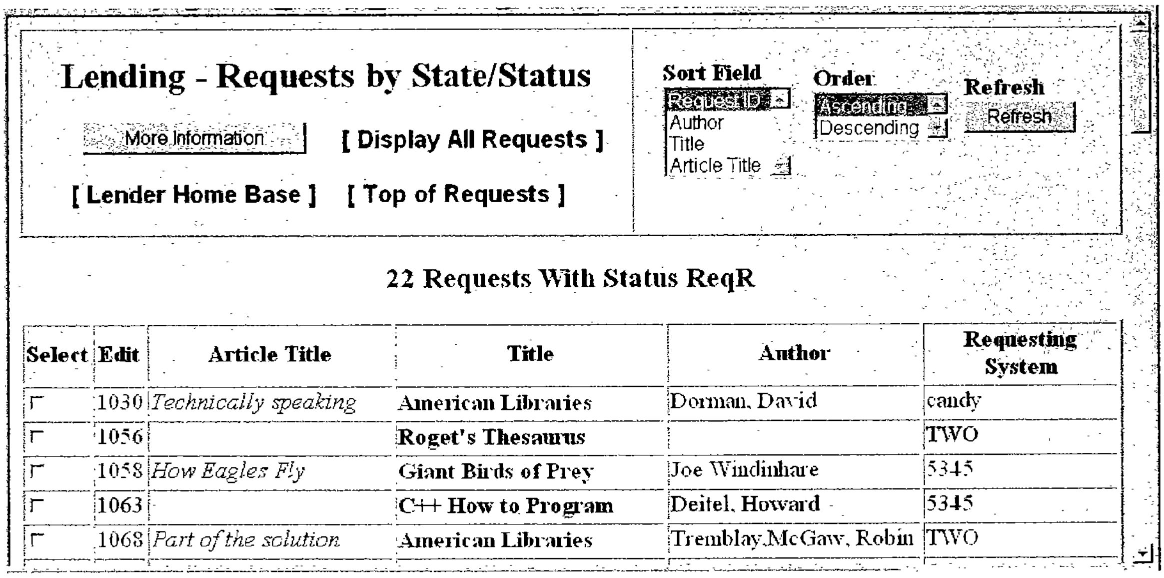
Go to the Lending Home Base and click the Work Queues hotlink. The next screen you will see displays a list of queues and the number of requests the queues contain. Each queue contains all the requests in a certain state. Click on the New Requests hotlink.

Lending - Work Queues

[Logout] [Lender Home Base] [Borrower Home Base] ?

NOTES from Trading Partner	[Read Notes]	5 requests
New Incoming Requests Needing Action	[New Requests]	**0** requests
Requests Needing Staff Action	[Needing Review]	**6** requests
Awaiting Shipping	[Will Send]	**0** requests
Requests Filled	[Filled]	(Not counted)
Items Which Are Overdue	[Overdue]	**0** requests
Conditions Pending	[Conditions Pending]	**10** conditions
Items Whose Return From Borrower Is Expected	[Return Expected]	**0** requests
Unusual Review Needs	[Unusual Review]	**6** requests

You will then see a list of all the requests which have newly arrived from borrowing libraries. From this list you can act on the requests in a number of ways, some of which will be described later in the lending portion of this guide. Whenever you are at a screen with a list of requests, you can select one or more requests by checking the relevant checkboxes and then pressing an action button at the foot of the list. You can also choose to deal with requests one-by-one, either by selecting a single checkbox or by navigating to the individual request record (hotlink in the Edit column) and using action buttons on that screen. You can even act on all new requests at once by clicking the Select All button.

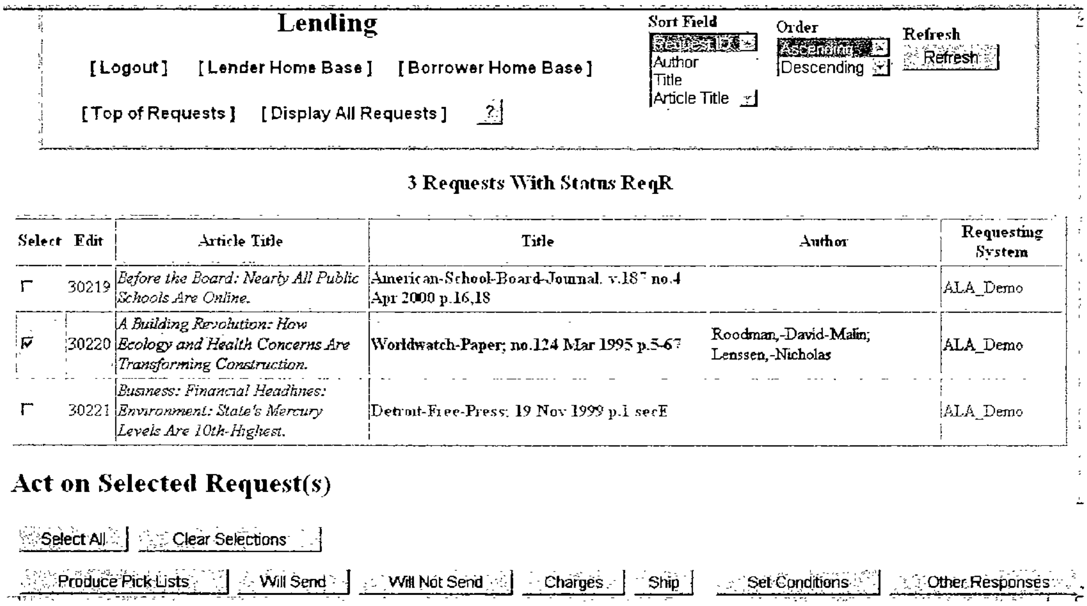


Select	Edit	Article Title	Title	Author	Requesting System
	1030	*Technically speaking*	**American Libraries**	Dorman, David	candy
	1056		**Roget's Thesaurus**		TWO
	1058	*How Eagles Fly*	**Giant Birds of Prey**	Joe Windinhare	5345
	1063		**C++ How to Program**	Deitel, Howard	5345
	1068	*Part of the solution*	**American Libraries**	Tremblay,McGaw, Robin	TWO

How do I tell a borrowing library that I will send them the item they requested?

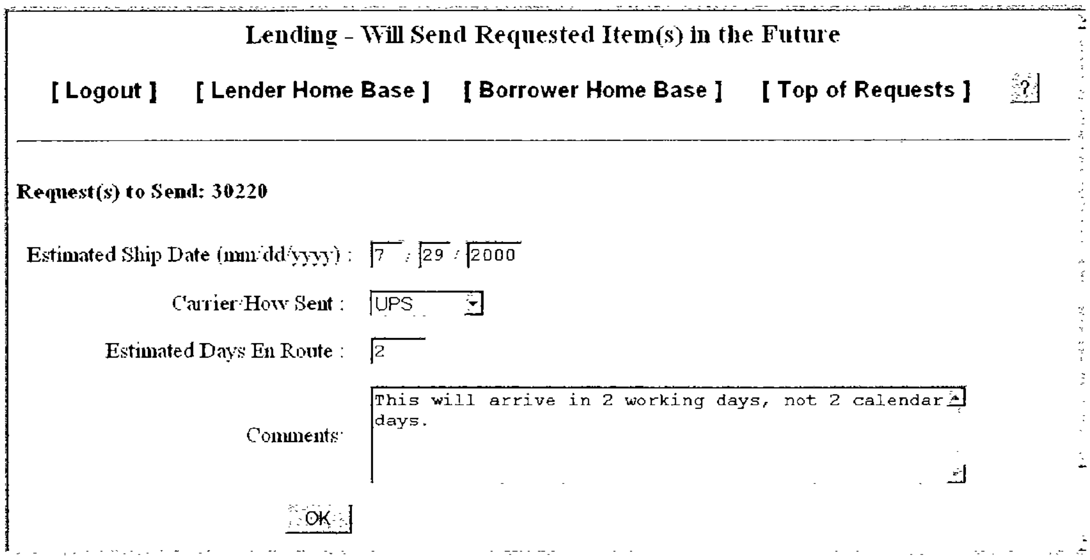
When you decide you want to fill a borrowing library's request, you will want to tell them when to expect the item. The next section explains how to perform this task.

Follow the above instructions to get to a list of all newly-arrived requests. Click the checkbox next to the request you are going to fill. Scroll to the bottom of the page and click the Will Send button (if you intend to ship in the future) or the Ship button (if you intend to ship immediately).



Select	Edit	Article Title	Title	Author	Requesting System
	30219	*Before the Board: Nearly All Public Schools Are Online.*	American-School-Board-Journal. v.187 no.4 Apr 2000 p.16,18		ALA_Demo
☑	30220	*A Building Revolution: How Ecology and Health Concerns Are Transforming Construction.*	Worldwatch-Paper; no.124 Mar 1995 p.5-67	Roodman,-David-Malin; Lenssen,-Nicholas	ALA_Demo
	30221	*Business: Financial Headlines: Environment: State's Mercury Levels Are 10th-Highest.*	Detroit-Free-Press; 19 Nov 1999 p.1 secE		ALA_Demo

On the next screen you will enter the date you expect to send the item and the method you will use to send it. Click OK.


Lending - Will Send Requested Item(s) in the Future

[Logout] [Lender Home Base] [Borrower Home Base] [Top of Requests] ?

Request(s) to Send: 30220

Estimated Ship Date (mm/dd/yyyy) : 7 / 29 / 2000

Carrier/How Sent : UPS

Estimated Days En Route : 2

Comments: This will arrive in 2 working days, not 2 calendar days.

OK

If you select the Ship button instead of the Will Send button, you will come to this screen. Here you have the chance to add charges, define a shipping date and method, choose whether or not to use IFM (if you and the borrower are both OCLC libraries), and specify a due date. When you have done all this, click the OK button.

[Lender Home Base] **[Top of Requests]** ?

CHARGES		SHIPPING
Add Charges for Request(s): 30220		NO MORE CHARGES TO ADD **Ship Request(s) 30220**
FAX Fee $ 5	ARIEL Fee $ 5	Date Shipped: (mm/dd/yyyy) 7 / 29 / 2000
PHOTOCOPY Fee $ 5	ELECTRONIC File Fee $ 5	
PURCHASE Fee $ 5	DAMAGED Fee $ 5	Carrier/How Sent: UPS
LOST Fee $ 5	OVERDUE Fee $ 5	Pages Sent
RUSH Fee $ 5	STAFF Fee $ 5	Estimated Days En Route : 2
SERVICE Fee $ 5	LOAN Fee $ 5	Use IFM? Do Not Use IFM
Adjust to Standard Charge $5		**Enter Due Date for Request(s) 30220**

$5

Enter Due Date for Request(s) 30220

Due Date (mm/dd/yyyy) 8 / 29 / 2000

OK

Charges Existing for Request(s) 30220

Request ID	Date	Type	Amount	Description
30220	2000-07-17	rush	5.00	Rush charge.
			$ 5.00	

New Non-Standard Charges:

Fill in the Description field for non-standard charges.

Description:	Amount:	New Charge:
miscellaneous	$ 1.50	Add Charge

You will be given confirmation that the Shipped message will be sent to the borrowing institution.

Successfully updated request(s) 30220

Article Title	Title	Next Action
A Building Revolution: How Ecology and Health Concerns Are Transforming Construction.	**Worldwatch-Paper; no.124 Mar 1995 p.5-67**	Shipped message will be sent

[Logout] **[Lender Home Base]** **[Borrower Home Base]** **[Top of Requests]**

How do I edit the record of a library to which I lend?

The WINGS system keeps a list of all the libraries with which you do ILL business. This next section will show how to edit the record of one of these libraries. In the WINGS system, these entities are called Trading Partners.

NOTE: When a borrowing request comes in from an unrecognized trading partner, the WINGS system creates a trading partner record automatically. The request is *not* rejected if the trading partner is unrecognized.

Go to the lending home base and click on the Trading Partners hotlink. You will arrive at the main screen for all tasks related to the libraries to which you lend. Fill in the Partner ID field next to the Edit Existing button, then click the Edit Existing button. You could accomplish the same thing by first pressing the List All button, then selecting the hotlink of the desired partner from the list. In either case, you end up in the Edit Partner screen.

Lending - Trading Partners

[Logout]   [Lender Home Base]   [Borrower Home Base]   ?

Description	Action	Desired Information
List All Trading Partners	List	
Create New Trading Partner	New	
Edit Existing Trading Partner	Edit	Partner ID ALA_Demo
Search Partners by Name	Find	Name
Search Partners by Partner ID	Find	Partner ID
Search Partners by System ID	Find	System ID
Search Partners by Communication Method	Find	Extended Request Protocol

You will arrive at the record for the trading partner you specified. Edit the fields as you see fit. When you are finished, scroll to the bottom and click the Save Changes button.

Lending - Edit Existing Trading Partner

[Logout] [Lender Home Base] [Borrower Home Base] [Associated Requests] ?

Required - **Partner ID:** (Unique Abbreviation) ALA_Demo [Change Partner ID] Note: Changing the Partner ID may require several seconds or even minutes, depending on how busy your WINGS™ server is.

Existing Partners (for reference) 3249

Required - **System Type:** (erp, iso) erp

Required - **System ID:** (ISO rules or host machine name) Demo

Required - **Computer Address:** (host:port) machine.pigasus.com:3499

Required - **Communication Method:** (erp, iso, oclc, vent) erp

Required - **Partner Name:** (Full Institution Name) ALA Demonstration System

Required - **Partner Name:** (Full Institution Name) ALA Demonstration System

ISO Alias (OCLC, RLIN, etc. ID)

Forward to Partner: (Broker or intermediary library)

To OCLC Review File? ("Y" or "N") N

Username: (if required for access)

Password: (if required for access)

Local Field 1:

Local Field 2:

Local Field 3:

Shipping Address: Ultimate Library
6543 Academic Rd.
Lost Angeles, CA

Billing address:	Ultimate Library 6543 Academic Rd. Lost Angeles, CA
Contact/Policy Information: Save Changes	Fax: 384-555-3232 Electronic: Ariel: Contact: name & phone: Mark Twain, fax & email: , sam@hannibal.com

How do I search for a specific request in the WINGS system?

If you wish to act on a certain request which has come into the WINGS system and you do not want to find it in a list of all requests, you can search for it using a number of criteria. The next section will show you how search for a request in the WINGS system.

Go to the Lender Home Base and click on the Requests hotlink. You will arrive at the main screen for all tasks related to requests. Click the Search button.

Lending - Requests

[Logout] [Lender Home Base] [Borrower Home Base]

Description	Action	Help
Produce Pick List	Pick List	?
Search for Request(s)	Search	?
Create New Request	Create	?
View Borrower/Lender Systems' Request ID Numbers	Table	?
Edit, Cancel, Update, Respond to a Request	Request No.: Act	?

At the next screen you can search for the requests by author, title, borrower's request number, or article title. Fill in the desired field and click the corresponding button.

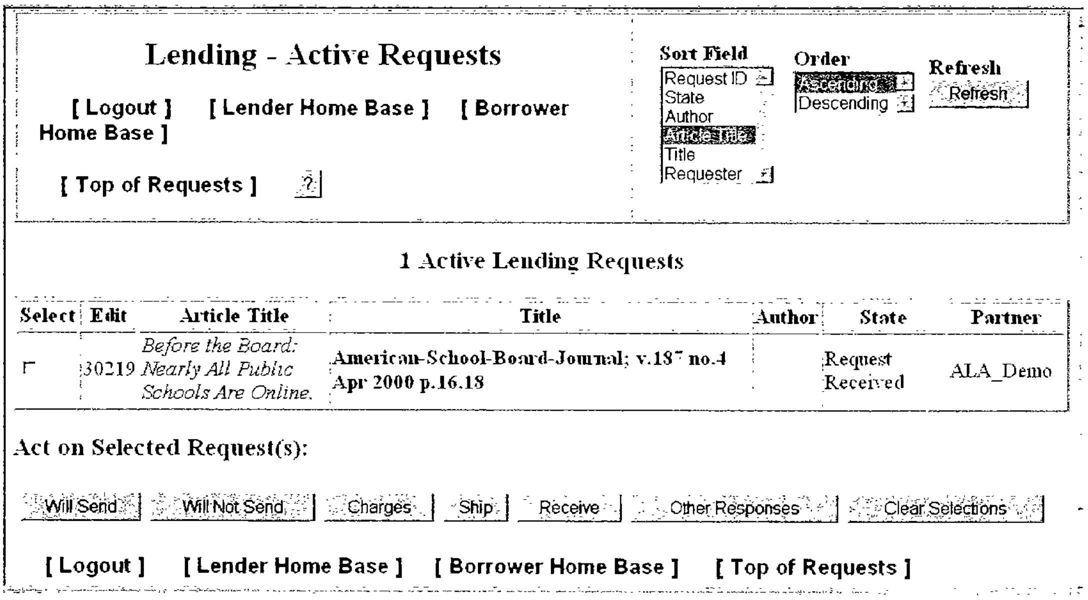
NOTE: Depending on how your library's database is set up, the search may be case-sensitive.

Lending - Search for Requests

[Logout] [Lender Home Base] [Borrower Home Base] [Top of Requests]

Description	Action	Desired Information
List All Active Requests	Active	
Search By **ACTIVE** State/Status	Find	ACTIVE State/Status: Exceptional Review Need
List All Closed Requests	Closed	
Search By **CLOSED** State/Status	Find	CLOSED State/Status: Closed
Search By **Borrower's** Request Number	Find	Borrower's No:
Search By Title	Find	Title:
Search By Article Title	Find	Article Title: Before the Board
Search By Author	Find	Author (last name first):
Search by Partner ID	Find	Partner ID:

The results of your search will be displayed on the next screen. From here you can act on them as you wish by clicking the checkbox next to the request and clicking the appropriate button at the bottom of the screen.



Summary

In this staff guide we have walked you through some basic tasks on both the borrowing and lending sides of the WINGS Request Management System. In doing so, we hope to have familiarized you with the user interface, thereby preparing you to perform other tasks not specifically described in this guide.

If you have any questions, please call the support staff at Pigasus Software, Inc. You can reach them toll-free at 877-PIGS-FLY between 9:00 a.m. and 5:00 p.m. Central Time (USA).

Thank you for using the WINGS Request Management System. We truly believe it will make your ILL duties much simpler. Enjoy!

Appendix 1: States

Messaging between systems causes automatic state changes. These states are crucial to the functioning of the overall WINGS system. Because not all trading partners are automated, there will be some times in which a staff member may need to make a manual state change. This is by far the exception. The WINGS system is designed to make the state changes automatically. These states are listed in "life cycle" order rather than alphabetically. Note that the states, though logically similar, are named differently for the Borrowing and Lending roles.

Borrowing States

- ⌘ Eval – This is the initial state for newly-created requests. During this phase automated processing as defined by the library occurs.
- ⌘ Rev – This is where all new borrowing requests end up.
- ⌘ ARep – These are requests awaiting reply. This is the state of a request once it has been sent to a lender/responder. A request normally retains this state until the lender/responder sends a message that the item either will be sent or has been shipped. If the former, then the request will go to an "Expected" state until the "item has been shipped" message has been received.
- ⌘ Expt – Requests which bear the state of Expected are those which have been sent to a lender/responder and which have had a message from that lender/responder saying that the item will be sent. The item has not yet been physically shipped, but it is expected to ship at some future point. If the lender/responder included the expected ship date in its message that information is available in the request at this point.
- ⌘ Sent – Requests with the state of Sent have been sent by a lender/responder, who has sent a message that the item has been shipped. Requests with this state are in transit.
- ⌘ Locl – From the time that a requested item is received until the (returnable) item is returned it is under the control of the local ILS circulation system. If the requested item is shipped as a non-returnable, rather than going to the state of Locl, it will go to Closed once delivered to the patron. The WINGS system continues to track the item and to send and receive applicable messages such as requests for renewal until the returnable item comes back into the library's physical control. Information is passed between the ILS and the WINGS system as needed.
- ⌘ CkIn – This means that the returnable item has been returned to the requesting/borrowing library by the patron. Some processing can occur at this point to check for further local need before returning it to the lender.
- ⌘ Wait – This state means that the returnable requested item has been cleared for shipment back to the lending/responding institution, but that physical shipment has not happened yet. It is in internal transit.
- ⌘ Ret – This state means that the returnable item has been shipped back to the lending/responding institution. At this point the request reaches the end of its life cycle. The only other message expected from the lending/responding institution is a Received message, showing that the item has arrived safely.
- ⌘ Excl – Requests with this state require human review because of exceptional situations. Either something unexpected has occurred or a message requiring human reaction or interpretation has been received. Examples of the unexpected are receiving a Recall message for an item you never received, or receiving a Will Send message for something you canceled. Examples of a message needing human action are Lost or Damaged.

- ⌘ Rej1 – Requests with this state have been rejected, removing them from all further processing. Rejection usually occurs because the request does not meet some site-set requirement. Rejection can be done either by humans or by machine processing. Rejection is a terminal state (nothing else comes after it).
- ⌘ Cncl – A request with the state of Canceled has been removed from further processing because it is no longer needed for some reason. This is a terminal state (nothing else comes after this state). Canceling is normally done by a human – either a staff member or the originating patron. Sending a cancel message to the responding/lending institution will cause them to cancel their corresponding request. The message results in both the lender and the borrower putting their request into the terminal canceled state.
- ⌘ W4cr - A request goes to this state for the brief time between sending the cancel message to the trading partner and receiving a "cancel OK" reply from that trading partner. In cases where automated communication occurs, this wait may be so short as to be invisible to a human. Receiving the "cancel OK" message changes the request's state to Cncl.
- ⌘ Cls1 – Requests with this state are closed, meaning they have reached the end of their life cycle. The requests may have been filled with a returnable item which has been sent back to the lender. Or they may have never been filled and the time needed by expired. Or they may have been filled with a non-returnable item, which has been delivered to the patron. Closed is a terminal state (nothing comes after it).

Lending States

- ⌘ ReqR – This is the first state requests have on the lender/responder side. Requests with this state have just entered the system, having been received from a trading partner in some form. At this point, some machine processing as defined by the library usually occurs.
- ⌘ HRev – Requests with the state HRev require human review. This may be a result of library policy, ambiguity of an automated decision, or a workflow issue, such as needing to get the physical item in hand.
- ⌘ Will – Requests with the state of Will Send have passed staff screening. The lender/responder has determined that it will fill the request at some future point. Part of the message sent to the borrower includes the estimated ship date. Items related to requests in the Will state are promised, but not yet sent.
- ⌘ ISnt – A request with this state means that the requested item has been physically shipped to the requester/borrower. A request normally stays in this state until the borrower sends a message saying that they have shipped the item back to the lender. In the case of a non-returnable item the state will change to Cls2 once the borrower has received the item.
- ⌘ RExp – A request with this state means that the borrower has sent a message saying that it has shipped the returnable item back to the lender. If the item is not received, then action to track it with the carrier is begun.
- ⌘ Exc2 – Requests with this state require human review because of exceptional situations. Either something unexpected has occurred or a message requiring human reaction or interpretation has been received. Examples of the unexpected are receiving a Recall message for an item you never received or receiving a Will Send message for something you canceled. Examples of a message needing human action are Lost or Damaged.
- ⌘ Rej2 – Requests with this state have been rejected, removing them from all further processing. Rejection usually occurs because the request does not meet some site-set requirement. Rejection can be done either by humans or by machine processing. Rejection is a terminal state (nothing else comes after it).
- ⌘ Cnc2 – A request with the state of Canceled has been removed from further processing because it is no longer needed for some reason. This is a terminal state (nothing else comes after this state). Canceling is normally done by a human – either staff or the originating patron. Sending a cancel message to the responding/lending institution will cause them to cancel their corresponding request. It is possible, but unusual, for the cancel message to come from the lender to the borrower. In either case the message results in both the lender and the borrower putting their request into the terminal canceled state.
- ⌘ Cls2 – Requests with this state are closed, meaning they have reached the natural end of their life cycle. They may have been filled with a returnable item which has been received back from the borrower. They may have been filled with a non-returnable item which thre borrower has received. Or they may never have been filled and the time needed by expired. Closed is a terminal state (nothing comes after it).

Appendix 2: The Life Cycle of a Request

This section describes what happens to a request during a normal life cycle of a returnable item.

Borrowing	Lending
The request is created, either by a patron or by a staff member on a patron's behalf. It appears in the WINGS system in the Eval state.	
If there are no machine evaluations to be done on the request, it automatically moves into the Rev state and appears in the New Requests queue.	
A staff member approves the request and sends it to a trading partner. The requests moves into the ARep state and appears in the Answers Pending queue.	
	An incoming request arrives in the WINGS system. It is in the ReqR state, and appears in the New Requests queue.
	A staff member selects the request and clicks the Will Send button. The request moves into the Will state and appears in the Will Send queue.
A message from the lending institution arrives notifying you that they intend to fill the request. The request moves into the Expt state and appears in the Items Expected queue.	
	The requested item is Shipped from the lending institution. The request moves into the ISnt state and appears in the Filled queue.
The lending institution has notified you that the requested item has been shipped. The request moves into the Sent state and appears in the Items Shipped queue.	
You receive the requested item. A staff member Receives it in the WINGS system. If this is a returnable item, the request moves into the Locl state and appears in the Items Locally Checked Out queue. If this is a nonreturnable item, the request moves into the Cls1 state and is closed. The patron picks up the requested item.	
	The borrowing institution notifies you that they have received the requested item. If this is a nonreturnable item, the request moves into the Cls2 state and is closed. If

	it is a returnable item, the request remains in the ISnt state and the Filled queue.
The patron returns the requested item to the library. A staff member Checks In the item. The request moves into the CkIn state and appears in the Return Items queue.	
A staff member Ships the item back to the lending institution. The request moves into the Ret state.	
	The borrowing library notifies you that they have shipped the requested item back to you. The request moves into the RExp state and appears in the Return Expected queue.
	The item arrives, and a staff member Receives it. The request moves into the Cls2 state and is closed.
The lending institution notifies you that they received the item. The request moves into the Cls1 state and is closed.	

Comments and Suggestions
We welcome any comments and/or suggestions you may have regarding this documentation. You can send them to:

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Thank you!