



SPRUCE

Procedures Documentation

Procedures for interlibrary loaning from other Spruce libraries

Resource Discovery

1. Check if the title is available at another Spruce library. In the “Search Catalogue” screen, change the Search Library to Spruce Cooperative.
2. If the title is **not found** at another Spruce library, check on fILL (<http://fILL.mb.libraries.coop/>). Spruce libraries should not show up in fILL as you’ve already verified that no Spruce libraries hold the title.

Requesting an item from another Spruce library

1. In the staff client place a hold for your patron the same way you would place a hold on one of your own titles. **Reminder: a title level hold will get you the first available copy, an item level hold will wait for that specific copy.**
 - a. Watch call numbers, avoid placing holds on items with ILL or On-Order in the call number.

When the title is received:

1. Check in the item to capture the hold (this moves the item from status “in transit” to status “on-hold”)
2. Print the holds slip.
3. When the patron comes in to pick up the item simply check out as usual.
4. Loan period for inter-library-loan is 1 loan with 1 renewal. (Spruce Policy)
5. When item is returned you will get a transit slip telling you which library to return it to. (the title goes to status “in transit”)
6. **IF** the title is no longer needed and a hold is not filled the hold must be cancelled and then the item checked in to change the status of “in-transit” to your library to “in transit” to the owning library.

Procedures for Spruce libraries filling interlibrary loan requests from other Spruce Libraries.

Check your pull list at a minimum daily (preferably more often):

1. Requested titles will appear on your PULL LISTS FOR HOLD REQUESTS.
2. Retrieve the item from the shelf.
3. Check in the item to capture it for the hold (this puts the item “in-transit” to the requesting library).
4. Print the transit slip so you know where to send it.
5. Do your thing with the Canada Post labels and send in the mail.
6. IF you cannot find the item or you are not filling the hold for any reason DO NOT CANCEL THE HOLD.
 - a. Set the status of your item to “missing”.
 - b. If your library owns the only copy in Spruce, contact the requesting library telling them you cannot fill the hold. They will cancel the hold.

When the item is returned:

1. Check in the item as usual.
2. Shelf it as usual.

Spruce InterLibrary Loan Tips & Etiquette

1. Check your Pull List daily.
2. NEVER CANCEL A HOLD (This also deletes the name of the patron requesting the item)
 - a. Only the library placing a hold should ever cancel a hold – No matter what!
 - b. Same applies for in fILL, never cancel a request, **you can decline it but never cancel it.**
3. If you are going to override a hold on a title to check it out to your patron, let the requesting library know.
4. Always include a return postal sheet.
5. Always “check in” items when you receive them back from an ILL. (Spruce or fILL)
6. Blue Bags belong to Winnipeg Public Library, only use their bags when returning items to WPL and do not use them for ILLs to other libraries.
7. If you receive a loan from out of province, use the same bag to return the item.

Catalogue Clean Up

Keeping items in the correct status allows us to provide better service. Here a few things to check regularly.

Transit List

1. Admin – Local Administration – Transit List
 - a. Check Transit to your library and from your library (change transit date falls between to “the Beginning” and “7 days” (this allows for items actually in transit / the mail).
 - i. Check your shelves for these items, do they need to be checked in?
 - ii. If you’ve sent something back has the receiving library checked it in?
 - b. Item’s “in-transit” cannot be tagged for a hold. Keeping on top of this benefits everyone.

Browse Hold Shelf

1. Circulation – Browse Hold Shelf
 - a. Do you have items that are status “on-Hold” sitting on your shelf? Check this to see what really old holds have never been cancelled.

Unfilled Holds Report

1. Run a report to show you what holds your patrons have that have never been filled.
 - a. Unfulfilled & Uncancelled ILC Holds Placed within Time Span
 - b. Long-time Unfulfilled Holds (without Limit on Expire Date)

General Spruce InterLibrary Connect Information

Circulation Policies:

- Circulation policies on SPRUCE InterLibrary Connect items are determined by the check out library, whether that be at another library, or your library.
 - Circulation policies determine the duration of loans, fine amounts, and the number of renewals allowed, based on an item's circulation modifier and or patron or staff profile.
 - Checkout location is used as a match point when deciding which library's circulation policy to use. This allows the checkout library to apply the same policy to all inbound Spruce ILC items.
 - Basing circulation policy on checkout library functions as described below.
 - If Library A's item is checked out at Library A, Library A's regular home policy is applied.
 - If it is renewed on Library A's OPAC by patron, Library A's home policy is used.
 - If it is renewed at Library B, Library B's circulation policy is used.
 - If Library A's item is checked out at Library B, Library B's circulation policy is applied.
 - If it is renewed on Library B's OPAC, Library B's circulation policy is used.
 - If it is renewed at Library B (or C), Library B or C's circulation policy is used.
 - If the item is renewed at Library A, Library A's home policy is Used.

Pre-due and overdue notices:

These notices will be generated based on the checkout library's schedule and sent to the checkout library or to patrons from the checkout library.

Spruce InterLibrary Connect Statistics

Spruce ILC statistics are generated based on the hold-in-transit records. When an item is sent away to fill a hold, a hold-in-transit record is created. Based on the item's owning library (lending library) and the transit destination library (borrowing library), we can count the number of items lent by a library as ILC to other libraries.

Spruce InterLibrary Connect reports templates:

There are a few templates in Sitka_templates > Intra-federation ILL stats.

The following two templates are designed for libraries to generate monthly ILC hold statistics:

- LIBRARY: Inbound ILC holds count for selected month
- LIBRARY: Outbound ILC holds count for selected month

In Sitka_templates > Circulation > Overdue and others folder

- Overdue Items Checked out at Other Libraries

These templates are good for monthly recurring reports.