



PALNI Group Circulation: Best Practices and Reconciliation

Great Lakes Resource Sharing
June 8-9, 2017



- AMBS
- Ancilla
- Anderson
- Butler
- CTS
- Concordia
- DePauw
- Earlham
- Franklin
- Goshen
- Grace
- Hanover
- Huntington
- Manchester
- Marian
- Oakland City
- Saint Francis
- Saint Joseph's
- Saint Meinrad
- Taylor
- Trine
- U of Indy
- Wabash

23 Libraries

PALNI + WorldShare = PALShare

- Formed PALShare Admin Team
- Met frequently
- Tested numerous scenarios
- Created policies

Best Practices - Lending

- Pulling Materials
- Processing Outgoing Materials
- Lending Returns

Pull List

If there was something to pull it would show up here.

Assist Patrons

Check In

Discover Items

▼ Reports

Pull List

Clear Hold Shelf

Pull List Updated: 06/06/2017 8:41:44 AM

[Print](#)






The operation was successful, but there is nothing to do.

[Refresh](#) Results 0-0 of 0

▼ Call Number	Format	Title	Shelf Location	Barcode	Enumeration	Patron Name	Borrower Category	Free Text	Request Date ▲
No data to display									

[Refresh](#) Results 0-0 of 0

Lables

DO NOT REMOVE THIS LABEL	DO NOT REMOVE THIS LABEL
	
	
PATRON _____	PATRON _____
DUE DATE _____	DUE DATE _____
PICK UP LOCATION _____	PICK UP LOCATION _____
14 Day Loan	60 Day Loan
How did we do? http://smarturl.it/palshare	How did we do? http://smarturl.it/palshare
OWNING LIBRARY: BUTLER UNIVERSITY	OWNING LIBRARY: BUTLER UNIVERSITY
DATE PLACED ON HOLD SHELF _____	DATE PLACED ON HOLD SHELF _____
DO NOT REMOVE THIS LABEL	DO NOT REMOVE THIS LABEL
	

Clear Hold Shelf

Clear Holds

The screenshot displays a library management system interface. At the top, there is a navigation bar with tabs for Metadata, Acquisitions, Licenses, Circulation, Interlibrary Loan, Analytics, and Admin. The 'Circulation' tab is active. On the left side, there is a sidebar menu with options: Assist Patrons, Check In, Discover Items, Reports (highlighted), and Pull List. Below the Pull List option, there is a 'Clear Hold Shelf' button. The main content area shows the 'Clear Hold Shelf' operation. It includes a header with the title 'Clear Hold Shelf' and a timestamp 'Updated: 06/06/2017 3:04:57 PM'. Below the header, there is a message box with an information icon and the text 'The operation was successful, but there is nothing to do.' To the right of the message box is a 'Print' link. Below the message box, there is a 'Refresh' button and the text 'Results 0-0 of 0'. Below this, there is a table with columns: Date, Patron Name, Borrower Category, Call Number, Format, Title, Shelf Location, Barcode, and Enumeration. The table is currently empty, displaying 'No data to display'.

Clear Hold Shelf Updated: 06/06/2017 3:04:57 PM

[Print](#)

i The operation was successful, but there is nothing to do.

[Refresh](#) Results 0-0 of 0

Date	Patron Name	Borrower Category	Call Number	Format	Title	Shelf Location	Barcode	Enumeration
No data to display								

Best Practices - Borrow


- Arriving Requests
- Borrowing Returns
- Miscellaneous

Reconciliation

- Goals
- Things to Keep in Mind
- Process

Items in Transit

Example of Items in Transit Report



WorldShare®

Items in Transit Report
University of Saint Francis

Item Branch Name	Item Permanent Shelving Location	Item Title	Item Barcode	Item OCLC Number	Item Call Number	Item Material Format	Item Status Origin Branch	Item Status Destination
Vann Library	General Collection	Excursions in geometry /	39318010820596	22006239	QA445 .O44 1990	Book	Lilly Library	Vann Library
Vann Library	Juvenile Caldecott Collection	Sam & Dave dig a hole /	39318010977461	869526980	PZ7 .B26615 Sam 2014	Book	Saint Meinrad	Vann Library
Vann Library	Microfiche Collection	Childhood education.	0	1554226	Childhood education	Jmi	Saint Meinrad	Vann Library

Reports

- OCLC sends us monthly reports.

Excel Online interface showing a report titled "PALNI Reports" with the following data:

Item	Patron Custom Category 2	Patron Custom Category 3	Patron Custom Category 4	Loan Checked Out Date	Loan Notification Count	Item Days Overdue	Item Long Overdue Date/Time
5	N/A	N/A	N/A	8/09/2016	8	31	1/1/9999 12:00:00 AM
6	N/A	N/A	N/A	2/9/2017		26	1/1/9999 12:00:00 AM
7	N/A	N/A	N/A	4/6/2017		8	1/1/9999 12:00:00 AM
8	N/A	N/A	N/A	4/6/2017		8	1/1/9999 12:00:00 AM
9	N/A	N/A	N/A	3/21/2017		16	1/1/9999 12:00:00 AM
10	N/A	N/A	N/A	10/6/2016		162	1/1/9999 12:00:00 AM
11	N/A	N/A	N/A	3/13/2017		24	5/28/2017 7:04:42 AM

Future of PALShare

What's next?



Contact Information

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