

**WISCAT – Instructions for NFLS OWLSnet Libraries**  
**Checklist of the basic Wiscat tasks to staff at your library**

Updated July 2014 These instructions are posted on the NFLS ILL webpage

**Reminder:** To make it easiest for NFLS or RL&LL to provide technical support for your library, please do not customize and/or change your library's Wiscat Staff login password from [%staff]+.

**Borrowing in Wiscat - required tasks:**

**- Establish a regular schedule where staff at your library check and work in the Request Manager as the Borrower:**

- Every week day if you're a larger library.
- At least 3 times per week if you're a medium-sized library.
- At least 2-3 times min. per week if you're a smaller library.

**- In the Request Manager as the Borrower:**

- Check for any patron-initiated *and* staff-created requests in "Awaiting Approval" status, "Passed to Local System" status, or any other statuses as the Borrower (like %Expired+) that need updating to %Approve Send+and/or further troubleshooting or processing.
- Watch for and respond to/update any statuses in Wiscat that need responding to (and/or awareness of) by your library.
- Keep your library's information current and accurate in your Participant Record in the Request Manager.
- Follow-up with other libraries to resolve unreturned items and/or any other issues that need resolving. Look up how to contact other WI libraries by using the Wiscat directory (Request Manager - "Search Library Information").
- For any items lent to you by OCLC libraries, maintain a filing system to use for the request paperwork that comes with these items so you can include the paperwork with the item when you return it .

To update the Wiscat request to %Received+status when an item from an OCLC lender arrives at your library, you need to look up the request in Wiscat by its title (or it might be in %Shipped+status) because the request number/s on the paperwork from the OCLC lender will refer to the OCLC request number, not the Wiscat request number.

**Lending in Wiscat - required tasks:**

**- For the initial set up of your library as a Lender in Wiscat, review the information in your library's Participant Record (in the Request Manager):**

- Check that your library's contact and ship-to information is current and accurate.
- Check that your library's lending policy reflects the items you'll be borrowing and lending and the loan periods you want to set per format.
- Check that your library's "Days to Respond" and %Days Requests are Processed+fields are set to reflect the days your library staffs its lending tasks (the days of the week when your library staff will be checking for and filling requests as a lender, checking for renewal requests, etc.).
- Familiarize yourself with the Holiday List. Use this sparingly but as needed to turn your library off as a lender to handle staff vacations and other temporary staff absences.

**- Establish a regular schedule where staff at your library check and work in the Request Manager as the Lender:**

- Every week day if you're a larger library.
- At least 3 times per week if you're a medium-sized library.
- At least 2-3 times min. per week if you're a smaller library.

**- In the Request Manager as the Lender:**

- Check for and process any pending requests as the lender. For a checklist of specific steps for processing requests as a lender, see the %WISCAT: Basic Lending+Instructions posted on the NFLS ILL webpage.
- Watch for and respond to/update any statuses in Wiscat that need responding to (and/or awareness of) by your library as the lender.
- Keep your library's lending information current and accurate in your Participant Record in the Request Manager.
- Follow-up with other libraries to resolve unreturned items and/or any other issues that need resolving. Look up how to contact other libraries by using the Wiscat directory (Request Manager - "Search Library Information").

**Requests As a Lender that your library receives via Email:** Watch for any requests your library may receive via fax or the email account listed in your Wiscat Participant Record for contacting your library (Example: ocf@mail.nfls.lib.wi.us is listed for Oconto Falls). Because Wiscat can send your library's requests through OCLC to OCLC libraries as a lender (but OCLC libraries can't access Wiscat libraries through Wiscat), an OCLC library trying to borrow from your library needs to send you a request via email (or fax). There may not be that many of these, but your library should watch for these and create a process for handling them.