InfoPass: The Manual

May 28, 2014
Introduction

InfoPass, the Information Passport to Milwaukee Area Libraries, is a set of web software designed to facilitate resource sharing of items among libraries. Prior to its development, this resource sharing was performed via paper documents. InfoPass makes the process easier and possibly faster.

The actual process is straightforward. A patron, with or without the assistance of a librarian from her home library, identifies an item (usually a book) at another library she would like to check out. If the librarian determines that the transaction is consistent with its policies, she uses InfoPass to initiate a reserve request for the desired item. Once the transaction has been entered into the system, the lender is notified via email that a request has been made. The patron goes to the lending library, identifies herself, and the item is checked out to her. The item is returned to the lending library at the end of the lending period.

The InfoPass web can be divided into four parts, Setup, Borrowing, Lending and Reports. Within Borrowing, it is possible to Add a User, Reserve an item at another library, and view Reports.

Within Lending, it is possible to Check Out, Renew, and Check In items, as well as view Reports.

InfoPass

| ADD USER | RESERVE | CHECK-OUT | RENEW | CHECK-IN | REPORTS | POLICIES |

Information Passport to Milwaukee Area Libraries

*Figure 1. InfoPass opening screen.*

In the following sections you will learn how to set up the software for your library, and how to cover borrow and lend in depth.
Setup

To begin the setup process, go to http://www.wils.org/infopass. This is also the address you will select whenever you want to use InfoPass. You will be prompted to log in (Figure 2). First, select your library from the list provided in the dropdown. (If your library isn’t there, please contact WiLS.) Type in the word “password” (without the quote marks). You will then be prompted to change your password (Figure 3). Type in your new password at the two prompts.

InfoPass

<table>
<thead>
<tr>
<th>ADD USER</th>
<th>RESERVE</th>
<th>CHECK-OUT</th>
<th>RENEW</th>
<th>CHECK-IN</th>
<th>REPORTS</th>
<th>POLICIES</th>
</tr>
</thead>
</table>

![InfoPass—Home Library Selection](image)

*Figure 2.*
Once your password has been successfully changed, you can then complete setup by clicking on the Policies tab on the InfoPass page. The Policies page (Figure 4) will be

"Figure 3."

"Figure 4."
loaded. Fill in the required information. The options “Omit Saturday” and “Omit Sunday” allow you to skip those days in the calculation of the circulation period. Email will be used to notify you when another library as borrower has initiated an InfoPass transaction with your library (lender). You’ll see more about this later. It is important to assign an address that is actively read by someone. It is possible to provide multiple email addresses. Simply separate them with a comma.

The “Informational Web Site” should be the web address where you have provided information about your InfoPass policies. If you do not have such a page, you may leave this blank or insert the address of your library’s main page. Finally, click on “Update Policy” to complete the setup.

From the policies page there is another tab available called Parents. This is only for use of libraries that have branches (children). Currently, the information saved here is unused.

To return to the full set of tabs click on Main.

That completes the setup process.
Borrowing

Add User

The name of this function is something of a misnomer, since it is possible in addition to adding a user to edit the user’s information or delete the record entirely. Note that it is not necessary to use Add User to add users to the database. If, when an item is being reserved, the software cannot find a user matching the ID that is typed in, the Add User page will automatically be loaded and the patron can be added at that point. Add User is most useful to verify existing patron information, update that information, delete the patron record or check on the status of items reserved or checked out for the patron.

InfoPass

Information Passport to Milwaukee Area Libraries

Test Institution 1

Search, Add, Edit, or Delete Patron

<table>
<thead>
<tr>
<th>*Patron Unique ID</th>
<th>11111111</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Tom</td>
</tr>
<tr>
<td>*Last Name</td>
<td>Ziller</td>
</tr>
<tr>
<td>Address</td>
<td>20 Any Street, Milwaukee, WI 53209</td>
</tr>
<tr>
<td>Telephone</td>
<td>414-555-1212</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:tziller@live.com">tziller@live.com</a></td>
</tr>
</tbody>
</table>

*Searchable Fields

Figure 5. Add User page with information filled in.
Completing the page is straightforward. All fields are required except for the email address. Fill in the fields and then click on Add Patron. If you are editing information, change the fields as necessary and then click on the Save Edits button. Click Delete Patron to clear the patron from the database.

If you wish to edit or delete a patron record the first step is to locate that patron’s record. In order to do so you must type in either the Patron Unique ID or the patron’s Last Name. Then click the Search For Patron button. Either the patron information will appear in the form fields; or, if there are multiple patrons that match the last name search they will appear after the input fields; or, a “patron not found” message will appear.

If a last name search finds multiple patrons you will be given the opportunity to indicate

Information Passport to Milwaukee Area Libraries

**test institution 1**

*Which patron are you searching for?*

**Name:** Zillner, Biff  
**ID:** 22222222  
**Address:** 20 Sunny Street, Anywhere, Wisconsin 53999  
**Phone:** 608-555-1212  
**Email:**

**Record Created:** 10/01/2012

![This Patron](image)

**Name:** Zillner, Scooter  
**ID:** 11111111  
**Address:** 1 Paradise Drive, Small Town, WI 53888  
**Phone:** 608-555-5555  
**Email:** zillner@wills.wisc.edu  
**Record Created:** 10/01/2012  
**Last Activity:** 10/05/2012

![This Patron](image)

*Figure 6.*
which one you’re searching for (Figure 6). Simply click on the This Patron button in order to identify the record. The Add User fields will then be filled in with that patron’s information, and circulation information (items checked out, reserves) will also be displayed (Figure 7).

Information Passport to Milwaukee Area Libraries

Test Institution 2

Search, Add, Edit, or Delete Patron

**Patron Unique ID**: 55555555

First Name: John

*Last Name: Doe

Address: 123 Main St

Telephone: 555-555-5555

Email: johndoe@email.com

Transaction Type: Checkout

Lending Library: Test Institution 1

Item Title: Title

Author: Author

Call Number: Call

Request Issued: 08/12/2013

Checked Out: 09/04/2013

Due Date: 07/01/2014

Transaction Type: Reserve

Lending Library: Test Institution 1

Item Title: Title

Author: Author

Call Number: Call

Request Issued: 08/12/2013

Figure 7.

Note that you can cancel reserves from this display.

Reserve

Click on the Reserve tab to initiate the reserve process (Figure 8). Select the Lending Library from the pulldown list. If the Patron ID does not appear in the database for your institution you will be prompted to add him or her (Figure 9). After you click OK an Add User window will appear automatically. Once you have filled in the user information you can close that window. Your Reserve page will still be there. You can click on the link “See Lending Policies” for further information about the lender’s policies for borrowing InfoPass materials. If the lending library has provided a website on the
Policies page, a link to it will appear after the Lending Policy link. Otherwise, “No Further Information Available” will be displayed.

Information Passport to Milwaukee Area Libraries

**test institution 1**

University of Wisconsin-Milwaukee Libraries

See Lending Policy

No Further Information Available

Patron ID: 111111111
Title: The Art of Beekeeping
Author: Bivens, Sanford
Call Number: QA 5272

Create a Record

*Figure 8.*

**The page at www.wils.org says:**

Must Add Patron As InfoPass User

OK

*Figure 9.*

Some information is required on the Reserve page. First, there must be a Patron ID. Second, at least one of the following must be included to identify the item requested: Title, Author or Call Number. If the appropriate information is not provided an error message will be displayed.
Once you have entered the required information and clicked on Create a Record several things happen: A record is created carrying the information entered, you are given the option to print a copy of the request, and a notification is sent to the lender via email indicating that the specified item has been requested (Figure 10).

Figure 10.

That completes the lending process. Note that if you wish to cancel the request before the lender has checked out the item you can do so via Add User by bringing up the borrowing patron by ID or last name.
Lending

Check-Out

It is possible for the lending institution to display all outstanding requests (items reserved but not yet checked out) through Check-Out. Simply click on the Check-Out tab. Figure 11 shows two requests in a checkout display.

Patron Library: test institution 4
Patron Name: Biff Beiderbeck
Patron ID: 999999999
Patron Address: any address
Patron Phone: phone
Patron Email: tzillner@live.com
Item Title: title
Author: author
Call Number: call
Request Issued: 11/04/2013
Due Date:

☐ Click here to select this item for checkout
☐ Click here to cancel this item

Patron Library: test institution 1
Patron Name: Tom Zillner
Patron ID: 111111111
Patron Address: 62 Any Place, Milwaukee, WI 55522
Patron Phone: 414-555-1212
Patron Email: tzillner@live.com
Item Title: The Art of Beekeeping
Author: Bisbee, Sanford
Call Number: QA 5272
Request Issued: 06/02/2014
Due Date:

☐ Click here to select this item for checkout
☐ Click here to cancel this item

Figure 11.
Notice that a due date is prefilled for each item. This due date can be changed to any date you prefer. You can select an item for checkout or cancel an item. Once you have selected one or more items to be checked out or cancelled click on Check Out/Cancel and the actions you have selected will be processed. There will be a message acknowledging how many items have been checked out.

After this, you can select Print Checked-Out Items to get a printout if you wish.

**Renew**

It is possible to renew any item that has been checked out and has not yet been checked in. All of the InfoPass items currently checked out by the lender will be displayed on the Renew page. See the Renew page entry for one of these items in Figure 12.

**Patron Library: test institution 1**
**Patron Name: Tom Zillner**
**Patron ID: 111111111**
**Patron Address: 62 Any Place, Milwaukee, WI 55522**
**Patron Phone: 414-555-1212**
**Patron Email: tzillner@live.com**
**Item Title: The Art of Beekeeping**
**Author: Bisbee, Sanford**
**Call Number: QA 5272**
**Request Issued: 06/02/2014**
**Current Due Date: 07/02/2014**
**Proposed New Due Date:**

☐ Click here to select this item for renewal

(Figure 12)

The proposed new due date will be calculated as: today + the number of days indicated in your lending circulation policy. You may change it if you wish. You must click on the checkbox to select the item. The Renew button is at the very bottom of the page. Click it to renew the items you have selected.
Check-In

See Figure 13 for a picture part of the Check-In page showing the same item that was shown above in the Renew page.

Figure 13.

Click on the checkbox to check in one or more items. The Check In button is at the very bottom of the page. Click it to check in the items selected.
Reports

There are a number of reports that can be produced depending on which features you select (Figure 14) via the checkboxes and radio buttons.

Information Pass Reports

test institution 1

Status Check of Current Requests

- Circulation History
- Current Circulation
- As Lender
- As Borrower
- Overdues Report
- Detailed Report

To Export data for Excel:

1. Produce Export File
2. Wait for message that you may download the file.
3. Download the export file

Figure 14.
For example, the page initially has Circulation History and As Lender selected. Overdues and Detailed Report are not selected. All reports display directly on the screen. The Export option produces a file.

Figure 15 shows a report produced if you leave the defaults selected as in Figure 14.

**Number of Items Checked Out By Month**

<table>
<thead>
<tr>
<th>Month</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/2012</td>
<td>6</td>
</tr>
<tr>
<td>2/2012</td>
<td>4</td>
</tr>
<tr>
<td>3/2012</td>
<td>6</td>
</tr>
<tr>
<td>4/2012</td>
<td>3</td>
</tr>
<tr>
<td>5/2012</td>
<td>1</td>
</tr>
<tr>
<td>6/2012</td>
<td>2</td>
</tr>
<tr>
<td>7/2012</td>
<td>5</td>
</tr>
<tr>
<td>8/2012</td>
<td>4</td>
</tr>
<tr>
<td>9/2012</td>
<td>4</td>
</tr>
<tr>
<td>10/2012</td>
<td>5</td>
</tr>
<tr>
<td>11/2012</td>
<td>10</td>
</tr>
<tr>
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<td>4</td>
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</tr>
<tr>
<td>2/2013</td>
<td>3</td>
</tr>
<tr>
<td>3/2013</td>
<td>5</td>
</tr>
<tr>
<td>4/2013</td>
<td>8</td>
</tr>
<tr>
<td>5/2013</td>
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<tr>
<td>6/2013</td>
<td>3</td>
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<tr>
<td>7/2013</td>
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<td>8/2013</td>
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<td>1/2014</td>
<td>2</td>
</tr>
<tr>
<td>2/2014</td>
<td>3</td>
</tr>
<tr>
<td>3/2014</td>
<td>6</td>
</tr>
<tr>
<td>4/2014</td>
<td>1</td>
</tr>
<tr>
<td>5/2014</td>
<td>1</td>
</tr>
</tbody>
</table>

*Figure 15.*

A pretty graph for the past year is also produced (Figure 16).

*Figure 16.*
Clicking on the link “Status Check of Current Requests” will result in a display of all items associated with the institution as a borrower. This includes reserved items and items checked out from a lender. It is possible to cancel selected reserves from this page.

The Overdues Report can be run As Lender to identify overdue items in the lending role. In contrast the Overdues Report As Borrower identifies items that are overdue lent to patrons of the borrowing library no matter who the lender.

A Detailed Report As Lender will display the circulation information for all items as lender. Shown are Title, Author, Call Number, Patron Library, Patron, Checked Out, Due Date and Returned.

A Detailed Report As Borrower will display the circulation information for all items as borrower. Shown are Title, Author, Call Number, Lending Library, Patron, Checked Out, Due Date and Returned.

**Export**

It is possible to export the data from InfoPass as a .csv file that can then be imported into Excel. Instructions are contained on the Reports page. However, there are some details that have been omitted from the Reports page. Downloading will not save the file. It will display it as a web page. You must then save it from your browser with a .csv extension. (On the Macintosh, it must be saved with a .CSV extension—note the caps.)

Depending on the version of Excel you have, you can then either Open the resulting file from within Excel or Import it.

This concludes *InfoPass: The Manual.*