ALEPH VERSION 18
Overview of ILL2 Integrated ILL Session Notes

Aleph v.18 Overview of ILL2 Integrated ILL Session Notes
Prepared by Sonja Eilertson, PALS, April, 2008
Overview of ILL2 Integrated ILL

ILL2 brings the ISO ILL software into the staff GUI client. Because interlibrary loan is part of the staff client not only is interlibrary loan activity managed in the GUI client but functions such as privileges, ILL unit management, patron letters and reports are managed in the GUI client. Interlibrary loan tables and forms are in XXX40.

ILL2 brings in an additional processor- ue19. This processor will run in the background and do a locate and send on borrowing requests and a locate on lending requests. An interlibrary loan unit can choose for borrowing or lending to stop automatic processing of requests.

Navigating ILL2

To access the interlibrary loan module when you are logged on to ALEPH

- Click on the world icon 🌍 in the lower right hand corner of your desktop- the operations bar.
- Or from the Menu bar click on ALEPH and then Switch Application and hi-light “Run ILL”.

If your primary focus is interlibrary loan you will want to create a shortcut on your desktop to directly access interlibrary loan.
**Borrowing and Lending Tabs**

The Borrowing and Lending tabs allow staff to view and work on their requests. There are two views, a Functional display and a Summary Display.

Administration tab see your ILL unit settings, close your ILL unit for borrowing or lending, setup unmediated borrowing or lending, view and change your potential supplier lists.

Search tab staff can search for titles owned in MnPALS, University of Minnesota and other Z39.50 servers.
Summary Display for Borrowing and Lending tabs

The Summary display allows staff to see all of the categories and get an overview of their interlibrary loan requests.

Staff can use “Filter by” to sort requests.

Use “Select” to switch from Summary display to Functional display.

“View Active St.” when clicked see categories or subcategories which have ILL requests.
**Functional Display for Borrowing and Lending tabs**

When you are in the Summary view and click on a category or on an individual request you will be automatically switched to the Functional display so you can process the request.

- The Functional display shows request information.
- Staff can process requests in the Functional view.
- The Functional view has bulk processing options
- The Request Log is available in the Functional view.
- Sort Type allows staff to change order of display of requests

When you use Borrowing bar or lending bar and search for a request by request number you will be automatically switched to the Functional request information view.

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ADMINISTRATION tab

In the Administration tab staff will manage their interlibrary loan unit information and create or modify their Potential supplier lists.

Partners- Staff can view their ILL unit setup. Close your ILL unit for accepting lending or borrowing requests. Choose to use unmediated processing for lending or borrowing.

Potential Suppliers- View, add, rearrange or delete your potential supplier lists (L-PRINTED, E-COPY).
Search

Search is to search for a title and create an interlibrary loan requests from a bibliographic record.

The Find Search has three different types of searches available

- Advanced Search
- Multi-base
- Multi-field Search

Each Search option allows staff to select a Base. A base is typically a collection of bibliographic records. For interlibrary loan bases SYS01 and University of Minnesota will be commonly used as sources of bibliographic data. It is the source for bibliographic information but another library may supply the item.

- Base SYS01 is the MnPALS catalog
- Base University of MN contains records of all U of MN campuses.

To change the Base being searched click on the down-arrow next to the Base box in the Advanced Search or the Multi-field Search. You may want to try out the Multi-base search and select SYS01 and the U of M base.

Use Show to display the records that matched your search.

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Unmediated processing- ue 19

The background process ue19 is new in version 18. This new process goes out to the ILL requests database every ten minutes and looks to see if a locate and/or send needs to be done on a request. The ue 19 process replaces two separate services that could be run in WebILL.

Borrowing:
Locate- The borrowing locate checks your potential supplier lists to see which libraries own the item. Libraries that own the item are placed on the request’s Supplier tab.
Send- After a request has suppliers located then a Send is done.
Send- Requests with a status of Waiting for Process are sent to the lending library.

In ILL under Administration tab, your ILL unit can be set for unmediated processing of borrowing requests.

Lending:
Locate- Checks to see if your library owns the item and if it is available. Available meaning the item is not checked out. Also your policy allows this item to be loaned.
Depending on your ILL unit setup, requests for items that are not available can be placed in Mediated file for staff to review or an Automatic Answer Unfill can be done.

In ILL2 under Administration tab, your ILL unit can be set to allow unmediated processing of lending requests.
Borrowing mode—more detail

Summary—new subcategories

Functional-view and update request
The Borrowing Mode-more detail

The Borrowing Summary display
Summary display provides an overview of borrowing requests. When the + sign in front of a category is clicked on the subcategories are displayed.

Click on a category or subcategory in the left navigation pane to bring the requests into the right pane.

A category of requests can further grouped by using Filter By.

New subcategories have been added to help staff manage interlibrary loan requests.

The Waiting for Process category has a new subcategory Daemon Send Failed. Requests are placed in this subcategory when a server is not available to take in the request.

The Received category has new subcategories of Loaned to Library and Loaned to Patron.

- Loaned to Library- the ILL request has been Received
• Loaned to Patron- the ILL request has been Received and loaned/checked out to the patron in circulation.

The Returned category has new subcategories of Returned by Patron and Returned by Library.

• Returned by Patron
• Returned by Library- ILL Return has been done

Click on Select to display a list of the requests in this category or subcategory. When you click on Submit you will be automatically switched to the Functional Display.

Staff may use Filter by to sort their requests.
  Returnable/Nonreturnable
  Active Supplier
  Open Date
  Last Activity Date

**Borrowing Functional Display**

• View Request details and change request information before Sending to a lending library.
• Update a request- Ship, Print, Receive, Return, and Response, etc.
• View Request Log- The log replaces WebILL Transaction tab. The Request log shows all messages on a request.
• Bulk Operation (Processing)- Receive Returnable, Receive Nonreturnable and Return
Borrowing request tabs-Functional View

A borrowing request has five tabs. Each tab contains different information.

- **Request Info** tab- provides patron information and title information. There are no editable fields on this tab.
- **Bibliographic Details** tab-provides bibliographic data for a request. Most fields can be edited before sending the request to the lending library. Staff can add Title of Part or Page numbers for a request. If you need to supply additional information about a request after it has been sent, use Message.
- **Request Details** tab- change the Need by date, add a Staff note or change the Requested Media.
- **Suppliers**- if a locate has been done this tab lists the potential lending libraries. As in WebILL, staff can rearrange the order of a potential lending library on a request.
- **Received Messages**- shows only messages from the lending library.
Update/manage a borrowing request

Staff will update a request from the Functional display of a request. The hi-lighted request in the upper pane is the request that appears in the lower pane. The hi-lighted request is the request you are updating.

The actions to update a request are in upper pane. The update options are sensitive to the request status.

For Borrowing requests update options are:

- Locate
- Send
- Receive
- Return
- Response-Messages, Renew, etc
- Print
- Delete
- Change status- available for New, Located failed and Locally owned to change to Cancelled status
- Copyright
Print button
Click on the Print button for Letters to Patron

Information slip only letter- is setup to produce a paper copy of a request. This print is intended for staff to use.

These Letters can be setup to produce a paper copy, emailed to the patron or produce a paper and email letter.

- Missing Information
- Cancellation of Request
- Self-Owned Request
- Overdue Letter
- Arrival Letter
- Recall letter
- U.S. Copyright

Each library’s letters were copied from WebILL to ILL2.

The Note field on each of these letters will appear on the Letter to patron.
Response

The Response button allows staff to choose from various updating options.

Response contains:

- **Message** - send an message to the lending library staff
- **Renew** - send a Renew request to the lending library
- **Lost** - send a Lost message to the lending library
- **Damage** - send a Damage message to the lending library
- **Status Query** - send a Status query the software answers with the status at the lending library
Request log

The Request log replaces the Transaction tab.

On the Request Log staff will see all activity on a request. Staff will use the Request Log to see the Message they sent to another library. Only the Received message (message from the other library) displays on the Received Messages tab of a request.

You can Filter the Request Log for a specific transaction(s).
**Bulk Operation**

Staff can wand in the ILL request number or the item barcode.

Receive Returnable-allows staff to perform a number of receives on returnable items (books, videos).
Enter in the item barcode (if you want to use the barcode on the item) and the request number.

Receive Non-Returnable-allows staff perform a number of receives on article or copy requests.
Enter in the request number.

Return- allows staff to perform a number of Return in a row. Enter in either the Item barcode or Request number.
Services-Borrowing
From the Services Borrowing staff will run statistical reports, reports to manage patron requests and scrub patron data. The Help on each report provides information on how to setup the report.

Service ILL Borrowing
- Borrowing Library Statistic Report—lists ILL units supplied requests and the fill days.
- Patron Request Report—all requests for a specific patron barcode after a specific date or all requests made after a specific date.
- Static Status Request report—report lists requests whose status has not changed in the number of days specified in the report
- Outstanding requests of Former patrons—lists expired patron record active requests
- Claim Report and Letters—provides a report of requests that have been sent to a lending library but the item has not been received. Does have an option to print a letter but staff may want to send a Message to the lending library.
- Hold shelf list—lists requests that have been Received but not loaned to the patron

Services- Archiving
- Patron Link Removal—removes patron data from requests.

Services and reports can be setup to run on a regular schedule. Please run the service manually and figure out what parameters work for your ILL unit.
Viewing/Printing reports

From the menu bar choose ALEPH. Under ALEPH select Task Manager.

The report is on the server so it is displayed in the lower pane. Use the up arrow to bring the report from the server to your workstation. When the Report is in the upper pane (your workstation) staff can click on the report name to view or click on Print.
Lending

Lending-more detail
Lending-more detail
No new subcategories in lending.

Lending- Summary Display
Summary display provides an overview of lending requests. When the + sign in front of a category is clicked on the subcategories are displayed.

Click on a category or subcategory in the left navigation pane to bring the requests into the right pane.

Requests can be filtered by requester id (borrowing library symbol) or activity date.

Click on Select to display a list of the requests in this category or subcategory. When you click on Select you will be automatically switched to the Functional Display.
**Functional Display-Lending**

Request information-five tabs

- Request Info – borrowing library, need by date, title and author information
- Bibliographic Details-title and author information fields can be edited
- Request Details-Requested media, Need by Date, Requester note and Expiry date. These fields can be edited. After a Ship Supplied media and Expected Return date.
- Items- after locate is done item barcode(s) display, after ship the item barcode is displayed on the Request details tab
- Received Messages-only Messages from borrowing library will display

Update a lending request the actions available depend on the status of the request.

- Locate
- Ship
- Unfilled
- Check-In
- Response-Recall, Overdue, Message, Renew Answer and Status Query
- Print-lending slip to send with your item to the borrowing library
- Change Status- not available
- Refer/NA-not available for all ILL units. This action will cause a lending request to be changed to a borrowing request. In Staff Privileges Refer should be denied.
Response

Response allows staff to send a Recall, Overdue, Renew Answer, Message, Status Query, Conditional, Retry, Locations and Will Supply.

The actions allowed in Response are sensitive to the request status. Recall appears on a Requester Received request. Will Supply appears as an option on New requests.

Overdue is an option under Response that staff can use however most ILL lending requests will get an overdue status from the Overdue service that is setup to run automatically.
**Bulk Operation (processing)**

The navigational (far left) pane contains Bulk Operation work forms. The Bulk Operation work forms are Ship, Check-In and Unfilled. These forms would be an alternate way of updating requests. The bulk updating option may be more time efficient when a number of requests are being updated.

The Ship action is separated into three types of bulk forms.

- The Ship Returnable for books, videos or other material you want returned to your library. The Ship Returnable requires staff to enter in the Item barcode and the Request number of the item.
- The Ship Nonreturnable for copy requests.
- The Ship Electronic for MEDD requests. Remember when a request is sent as a Ship Electronic the request status is closed when the lending library ships the item. The Ship Electronic has been used primarily for MEDD delivery.

- Check-In is available as a bulk action.

- Unfilled is available as a bulk action.
Request Log (transaction tab)/ Messages

The Request Log replaces the WebILL transaction tab. The Request log shows all of the activity on a request when it was created, when it was shipped, when it was received, returned and checked in.

The Request log is the only spot where you will see all of the Messages on a request. On the Request details Received messages tab you will only see the messages that you have been sent to your library. You will not see the messages that you sent to a borrowing library. In the Request log you will see all of the messages and all of the activity on a request.

You are able to Filter the request log and look for specific activity.

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Services-ILL Lending

Under Services ILL Lending there are four services and reports for lending requests.

- Lending Library Statistic Report-Report lists all lending library activity and fill rate.
- Lending Library-ISO Overdue Handling- Service that looks to see if the Expected Return date is past if it is an Overdue APDU is sent to the Borrowing library. This service is setup to run for all ILL units on a daily basis.
- Lending Library-ISO Expired Messages-Service that looks to see if the expiry date on a lending request is past. If it is past the lending request status becomes expired. The borrowing request shows an expired from this lending library and could be sent to another potential lending library. This service is setup to run for all ILL units on a daily basis.
- Lending ILL Requests Report- Staff can print a report of lending requests and a file of lending pick-slips. This report and lending slip file can be setup to run on a schedule.
Services-Lending Requests Report

Report Name- This is the title you will look for when retrieving the report from the Task Manager. Make this title unique if you do not want to overwrite a report with the same name.

Print Slips- Yes lending pick-slips will be produced when Yes is checked. No is checked only a report is produced.
Slip File Name- If Print Slip is Yes enter a file name for the pick-slips. This is the title you will look for when retrieving the file of pick-slips from the Task Manager. Make this title unique if you do not want to overwrite a file with the same name.
Borrowing Libraries- All to include all borrowing libraries in the report or pick-slip file or click on a specific borrowing library to produce a report and slip file for that library.
Handle Request Status- Choose Locate, Multi-Locate or New.
  - Locate- items have been found that match the borrowing library request. A pickslip for a located request will include call number and item barcode(s).
  - Multi-Locate- two or more items may potential fill this request. (print and microfilm of a serial title).

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• New-locate has not been performed on these requests. No call number or item barcode information will be included on the slip.
• All- This will bring in all of your lending requests. This includes Closed, Not Supplied or Cancelled. You probably will not use All very frequently.

Update Status
If Yes then
• A Located request will change status to Located and Printed
• Multi-Locate will change status to Multi-Located and Printed
• New request will change to New and Printed

If No then request status will remain the same.

To view or print the report or print-slips go to menu bar ALEPH and select Task Manager.

Print on a lending request will not bring in Call number information.
ADMIN tab

Partners- ILL Unit and Supplier records
Potential Supplier lists
Administration Potential Suppliers

In Administration when you select Potential Suppliers from the navigation pane (far left pane)

- View what lists a supplier is on
- Change the Average supply days, expiry days or the Return delivery delay.

1. Click on ADMIN
2. Click on Potential Suppliers
3. Type in the ILL unit code or search for the code.
4. Click on Go

This will show you what lists this ILL unit is on.

I searched for IMNU, University of Minnesota Twin Cities, to see what lists this supplier is on.

Remember IMNU should be on all of your potential supplier lists.
- View a potential supplier list for example view your L-PRINTED list
  - Rearrange a supplier on a level
  - Add a potential supplier to a supplier list
  - Delete a potential supplier from a supplier list
  - Random or De-random a supplier list. (de-random proceed in set order down the list)

To view a list, click on Potential Suppliers and then use Media/Level dropdown choices to select a potential supplier list.
Setup

Print_ini
Locate Preview
Privileges
Unmediated processing
**Borrowing Print**

The Print button on a borrowing ILL request is connected to multiple Letters that can be used to inform a patron about their interlibrary loan request. When borrowing library staff click on Print a pop-up box of Letters appears. Staff can select from the drop-down list the appropriate letter.

- Missing Information
- Cancellation of Request
- Self-Owned Request
- Overdue Letter
- Arrival Letter
- Recall Letter
- U.S. Copyright Letter

The Note field will display on the letter the patron receives.

The Information Slip Only is being used as Staff printout. This has been setup to be a paper printout.

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**Borrowing Library Receive- Arrival Letter and Arrival Slip**

When borrowing library staff receive an interlibrary loan request an Arrival notice is automatically generated.

Information added to the Circulation note field will be displayed when the interlibrary loan request is loaned to the patron and on the letter to the patron.

Information in the Note field is placed on the Request log for the lending library to view.

When a Borrowing request is received three prints can be created.

- Patron Arrival Letter (ill-patron-letter-a)
- Arrival Slip to place in the book (ill-arrival-slip-new)
- Letter to Lending library (ill-borrow-receive-letter) available for non-ISO suppliers connected to checkbox on Receive- Send Received Letter to Supplier.

The Arrival Slip to be placed in the book is suppressed. The software is setup with the Arrival slip set to No-print.

**Setting up delivery format**

This must be done on each staff computer.

**ALEPHADM module**

1. From the ALEPHADM Menu bar click on Configuration
2. Under Configuration from the drop-down list select Print Configuration.
3. Under Print Configuration Applications choose Interlibrary Loan2.

4. In the column titled Function Name look for PatronLetter. The line PatronLetter controls all of the Letters to Patron produced when staff click on the **Print** button.

   - Missing Information
   - Cancellation Letter
   - Self-Owned
   - Recall
   - U.S. Copyright
   - Overdue
   - Arrival

5. The column titled ID controls which version of the letter is produced. For ADM with multiple ILL units each unit must enter in their ending extension. For example, Riverland Austin has the
extension 01 for their Patron Letters. Each Riverland Austin workstation must have 01 in ID column to get the correct version of the letter. Riverland Albert Lea workstations must have 00 in ID column.

6. The column titled Mail is used to setup how you want the Letter to patron to be delivered from this workstation.
   o The Mail column can be M (email), P (print) or B (both).

7. In the column titled Function Name look for Arrival Letter. The Arrival Letter line is used when staff Receive an ILL request and an Arrival letter is produced.

8. The column titled ID controls which version of the letter is produced. For ADM with multiple ILL units each unit must enter in their ending extension. For example, Riverland Austin has the extension 01 for their Patron Letters. Each Riverland Austin workstation must have 01 in ID column to get the correct version of the letter. Riverland Albert Lea workstations must have 00 in ID column.

9. The Mail column can be M (email), P (print) or B (both).
There are three letters generated with the Receive. All three letters are under the Arrival Letter (arrlet.prn). The Target 2 column has NO PRINT to prevent the arrival slip being generated.

If you choose to email your Receive Patron Arrival Letter you probably don’t want the Arrival slip emailed to the patron too. If you want to Print your Receive Patron Arrival Letter you may want to consider printing the arrival slip if needed for your work form.

**Editing letters**

ILL letters are in the ALEPH ADM XXX40 form_eng

<table>
<thead>
<tr>
<th>Letter Type</th>
<th>Form Name of Letter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missing Information</td>
<td>ill-patron-letter-0.xsl</td>
</tr>
<tr>
<td>Cancellation of Request</td>
<td>ill-patron-letter-c.xsl</td>
</tr>
<tr>
<td>Self-Owned Request</td>
<td>ill-patron-letter-2.xsl</td>
</tr>
<tr>
<td>Overdue Letter</td>
<td>ill-patron-letter-4.xsl</td>
</tr>
<tr>
<td>Arrival Letter</td>
<td>ill-patron-letter-a.xsl</td>
</tr>
<tr>
<td>Recall Letter</td>
<td>ill-patron-letter-5.xsl</td>
</tr>
<tr>
<td>U.S. Copyright Letter</td>
<td>ill-patron-letter-3.xsl</td>
</tr>
<tr>
<td>Information Slip Only (setup as print for staff)</td>
<td>ill-patron-letter-i.xsl</td>
</tr>
</tbody>
</table>

**Note:** ADM libraries with multiple ILL units will have extension on each of the letters. The extension number controls which letter is used for a unit.

Mike has copied your Letters to Patrons from WebILL to ILL2. For additional assistance editing the letters send in a ticket to PALS desk at [http://pals.custhelp.com](http://pals.custhelp.com) Dan will assist you in making modifications. He will request that you send a faxed mockup of the letter. Our fax number is 507 389-5488.
From ALEPHADM-setup on each workstation
1. From the menu bar click on Configuration
2. Hi-light Common Headings
3. Look for DefaultPrintConfig=
   To email notices setting should be 0 (zero not O)
   To print notices setting should be 1
4. MailServer= enter the mail server on your campus
5. FromAddress= must be a valid email address on your campus
6. MailerName=who is the sender of the email
7. Save
8. Restart ILL2 application

Talk with your System Librarian about setting up print_ini, editing letters in form_eng and changing your Application configuration. This setup is typically handled by system librarian.
Locate Preview

As a borrowing library you can have a preview of which libraries may be able to supply your request.

To allow Borrowing Preview on Locate click so it is checked

To disallow Borrowing Preview on Locate click so it is unchecked.

As a lending library you can have a preview the lending locate.

To allow Lending Preview on Locate click so it is checked

To disallow Lending Preview on Locate click so it is unchecked.
Privileges

Modify User to add ILL unit.

Access Rights to add ILL privileges.

The ILL unit must be in the Privilege.

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Unmediated Processing

Unmediated processing is handled by the addition of a processor ue19 and selection of unmediated processing in borrowing and lending unit tab. We have setup ue19 to run every ten minutes in the background.

UE19 functions

- Borrowing request for Locate
- Borrowing requests for Send (tab50 setup)
- Borrowing requests for Send to next potential lending library (requests in Waiting for Process)
- Lending requests for Locate

Administration

- Partners- Allows staff to view and change their interlibrary loan unit setup.
- Potential Suppliers-Staff can view and change their potential supplier lists.

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To find your ILL unit information click on Partners then use Search Mode and select one of the drop-down choices. At this time you will not be able to clearly view other ILL unit information.

Your ILL unit seven tabs of information; the Borrowing ILL unit and Lending ILL unit tabs will be the ones you primarily use.

**Borrowing – Unmediated Locate**

1. From the Administration tab click on Partners
2. In the Search Mode use dropdown options to select a search
3. Enter in free text corresponding text and click Go. (If I used Search Mode Code I would enter in the text box my ILL unit code. If I used Search Mode Keyword or Name enter in the name of your ILL unit)
4. Click on Borrowing ILL unit tab
5. Borrowing Unmediated Locate
   - If unchecked staff will need to locate and send all requests manually
   - If checked then locate and send will be down on borrowing requests on a continual basis with ue19.
6. Click Update to save any changes.

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Lending Unmediated Locate

1. From the Administration tab click on Partners
2. In the Search Mode use dropdown options to select a search
3. Enter in free text corresponding text and click Go. (If I used Search Mode Code I would enter in the text box my ILL unit code. If I used Search Mode Keyword or Name enter in the name of your ILL unit)
4. Click on Lending ILL unit tab
5. Lending Unmediated Locate-
   • If unchecked staff will need to click on Locate on each individual lending request.
   • If checked then locate will be down on lending requests on a continual basis.
6. Click Update to save any changes.
Workflow changes

- Create request for a patron
- Patron requests you are not going to fill
- Staff cancel a request
Create an ILL request from a bibliographic record
When a record is hi-lighted, ILL request will appear as an option in the lower pane.

1) Hi-light the title
2) ILL request link appears in the lower pane- click on it.
3) Complete the form. Enter in the patron barcode and check the Need by date
4) Click Send

If you have unmediated processing setup, the Locate and Send will be done for you automatically.

If you do not have unmediated borrowing, you will need to Locate and Send the request to the potential lending library.
Create a borrowing request from a blank form

From the Menu bar
1.) Hi-light Borrowing

2.) Then select Create New Serial Borrowing Request for a journal title
   Or select Create New Non-Serial Borrowing Request for a returnable item.
   The fields are the forms are different so remember to select the one that is appropriated for
   the format of the item you are requesting.

3.) Complete fields and use Send to enter the request.
How to answer a patron that you will not request an item

There are times when you will not be able to request an item for a patron. These requests may have a status of New, Locate Failed or Locally Owned. For staff to be able to update requests with the status of New, Locate Failed or Locally owned the option to Change Status has been added.

Change status is available on New, Locally owned and Locate Failed requests only. New, Locally owned and Locate Failed requests can be changed to Cancelled status. A patron will see this status change in Your Borrowing Record Total ILL requests.

For New, Locally owned or Locate failed request click on Change Status. This will bring up a pop-up box Change Request Status.

The only option for Choose Status is Cancelled request status. Information added to the Note field will display in the Request Log.

1. Click on Change Status
2. If staff add a Note, the note will be displayed in the Request log. Click OK to send the change.

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The patron will see the cancelled status when they look at their “Your Borrowing record” and view their completed ILL requests.

Staff may choose to send the patron a cancellation letter.

To send a Letter to a patron hi-light the request then click on Print.

A pop-up Print box will allow staff to choose the appropriate Letter. Information added in the Print Note field will display on the patron’s letter. Staff may choose to send the patron a cancellation letter.

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Staff Cancel of an ILL request sent to lending library

After a request has been sent to a lending library, staff may be told by the patron that the patron no longer wants the item.

In WebILL, a cancel could be done with an individual supplier or a cancel could be done to all suppliers. In ILL2 the cancel of a pending ILL request is handled differently.

For a request where there are multiple potential suppliers on the Suppliers tab. If a staff member needs to cancel the request at the current potential lending library they will click on Response and select Cancel.

1. If staff need to cancel the request so it is not sent to any other potential suppliers, staff will first Cancel the request at the current supplier and then delete future potential suppliers.
2. To remove future potential supplier libraries from a request on the Suppliers tab hi-light the future potential supplier. The status of the request will be Pending with a future supplier.

3. Then click on Delete. This will delete this ILL unit as a supplier for this request.

4. Staff will be asked to confirm that they wish to delete this potential supplier from the request.

5. Delete will need to be done on each future potential supplier.

If a patron cancels their request in the WebOPAC the request will be cancelled with all potential suppliers.

Try out the software

- Create a request as a patron from dev18 OPAC http://www.dev18.mnpals.net/F?RN=62169290&func=file&file_name=basic
- Check Borrowing Print make sure your Letter to patron is correct
- Locate and Send
- Ship

Think about unmediated processing

- Do you want to do unmediated processing for borrowing?
  - As a borrowing ILL unit should you review your potential supplier lists- level 99 supplier
- Do you want to do unmediated processing for lending?

Try out services- make sure your logon allows you to run the services you need.