ILL2- Overview of Integrated Interlibrary Loan
Overview ILL2

In version 18, WebILL has moved into the ALEPH client.

- One client to use for all of the modules.
- The interlibrary loan look has changed.
- Now use the XXX40 instead of XXX20 for tables
- Added unmediated processing, using background process called ue19.
Outline for the session

- Overview of the new look interface
- New background process-Unmediated processing
- Borrowing Mode- more detail
- Lending Mode-more detail
- ADMIN tab
- Setup issues
- Workflow changes
New look-like other modules

- Operations bar- ILL icon
- Menu bar- Services, ALEPH task manager and Borrowing-blank form
- Borrowing bar-search borrowing requests
- Lending bar-search lending requests
Borrowing, Lending, Administration and Search tabs
Borrowing and Lending tabs

- **Summary Display** - lists categories and subcategories with counts of requests
- **Functional Display** - view details of request and update request
- **View Active Status** - if checked you will see only those categories with requests

![Lending tab-Summary display](image-url)
Functional display - see Request details and update a request
Administration tab

- Partners - see information about your ILL unit, close your unit for borrowing and lending and select unmediated processing
- Potential Suppliers - view, add or delete suppliers from your potential supplier lists.
Search tab-
staff search for a bibliographic record to create an ILL request.
When a title is displayed, see ILL request link.

Search tab create a request from a bibliographic record.
New process-ue19

- ue19 runs in the background every 10 minutes.
- Lending requests
  - Lend Locate
- Borrowing requests
  - Locate and send
  - Send requests to next potential lending libraries-
    Waiting for process.
- Choose in your ILL unit if you want unmediated lending or borrowing
Borrowing mode-more detail

Summary-new subcategories

Functional-view and update request
Borrowing mode - more detail

Summary display

- New subcategory added under Waiting for Process
  - Daemon Send Failed
- New subcategories added under Received
  - Loaned to Library
  - Loaned to Patron
- New subcategories added under Returned
  - Returned by Patron
  - Returned by Library
Borrowing-Summary view

New subcategories

- Waiting for Process
- Daemon Send Failed
- Received
  - Loaned to Library
  - Loaned to Patron
- Returned
  - Returned by Patron
  - Returned by Library
Borrowing- Summary view

Filter by:
- Active Supplier,
- Last Activity date,
- Open date
- Returnable/Nonreturnable

Select
Hi-light a group or request and click
Select to move to Functional view
Borrowing mode-more detail

Functional display

- Two ways to get to Functional view
  - Summary display and click Select
  - Borrowing Bar use Request number and enter in a request number
- Functional display see Details of a request
- Functional display see Update a request
- Request Log
- Bulk operation- Receive and Return work forms
Functional view

Request log
Bulk operation
Update

Request details

Request Info tab-display
- Patron information
- Request author and title information
Bibliographic Details

Bibliographic Fields including the format fields can be modified.

Request Details tab

Request fields like the Need by date, requested media or pickup location can be changed.
Suppliers tab- after a successful locate the potential lending libraries are listed on this tab.

- Add supplier
- Rearrange supplier list
- Use Delete to remove a potential supplier from a request

Received Messages- messages sent from the lending library

After reading or responding to the message staff can dismiss the message
Actions available to update a request are sensitive to a request status.

Change status- available for New, Located failed and Locally owned to change status to Cancelled status.
Print allows staff to select a letter to patron.

“Information slip only” is a staff printout.
Information added to the note field will be sent to the lending library.

Response

Borrowing request - Response

- The children of Henry VIII / Alison Weir.
- Request No.: 18362
- Status: Loaned to Library
- Last Activity: 04/07/08
- Note: When convenient (Local)
Request log replaces the WebILL transaction tab.

In the request log you will see Messages you have sent on a request.
Bulk Operation- allows staff to Receive or Return a number of items in a row.

There is a Receive Returnable work form and a Receive Non-Returnable work form.

Staff can scan in the request numbers or barcodes.
Services menu-reports

ILL Borrowing

• Borrowing Library Statistic Report - statistics on what lending libraries filled requests.
• 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.
Archiving

- Patron Link Removal- removes patron data from requests.
Printing reports - for borrowing or lending reports

Click on your report in upper pane and click Print

Find your report in lower pane

Use arrow to move report

- Click on your report in upper pane and click Print
- Use arrow to move report
- Find your report in lower pane
Questions
Lending

Lending-more detail
Filter by
- Requester id- borrowing library symbol
- Open date
- Last Activity date

Hi-light a group and click Select to move to Functional view
Requester’s Reference No. is the borrowing request number.
Request Info tab- shows the borrowing library Need by date and the title and author information
### Bibliographic Details tab

<table>
<thead>
<tr>
<th>Format</th>
<th>Monograph</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>The global eighteenth century /</td>
</tr>
<tr>
<td>ISBN</td>
<td>0801868663</td>
</tr>
<tr>
<td>Publisher</td>
<td>Johns Hopkins University Press,</td>
</tr>
<tr>
<td>Publication Year</td>
<td>2003.</td>
</tr>
<tr>
<td>Main Author</td>
<td>Nutshell, Feltcity.</td>
</tr>
</tbody>
</table>

### Request Details tab

- **Requested Media**: Printed (loan)
- **Req. Ship Method**: Email
- **Level Of Service**: When convenient (Local)
- **Need by Date**: 06/30/2009
- **Ship Method**
- **Exp. Return Date**: 06/30/2009
- **Shipped Barcode**
- **Supply Note**
Items tab - after a successful locate the Items tab shows the barcode and the last return date.

Received Messages - shows message sent to your ILL unit. To see Messages you sent to the borrowing library use the Request log.
Lending Functional display-
Response

Response
Bulk Operation allows staff to Ship, Check-in or Unfill a number of requests in a row.
There is a Ship Returnable, Ship Non-Returnable and Ship Electronic.
Request log replaces the Transaction tab that was used in WebILL.

Lending staff will see the messages they sent on a request in the Request log.

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Description</th>
<th>System note</th>
<th>User note</th>
<th>User</th>
<th>Action date</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/7/08 03:44 PM</td>
<td>General Message Sent (ILL Lending)</td>
<td>General Message Note: This message will appear in the Request log. This message is being sent by the lending library to TSTI</td>
<td>PALS107</td>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>04/7/08 05:43 PM</td>
<td>General Message Received (ILL Lending)</td>
<td>General Message Note: This message will appear on the lending received tab. This message is being sent by the borrowing library from TSTI</td>
<td>BATCH</td>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>04/7/08 04:49 PM</td>
<td>ILL Request Message from Requester</td>
<td>ILL Request message from TSTI</td>
<td>BATCH</td>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>04/7/08 04:49 PM</td>
<td>Incoming ILL Request Created</td>
<td>Lending ILL Request no. 008354 was created for TSTI</td>
<td>BATCH</td>
<td>------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
Services menu

ILL Lending

Reports

• Lending Library Statistic Report-Report lists all lending library activity and fill rate.
• 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- ran automatically for your ILL unit

• 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.
Report name

Yes- will print slips

Slip file name

Handle request status-
locate, multi-locate and new

Update Status-change
status to Located and
Printed, Multi-located and
printed
Lending request-Print button

Lending request-Print is used for staff. No call number available.
Questions
ADMIN tab

Partners- ILL Unit and Supplier records
Potential Supplier lists
ADMIN tab

- The ADMIN tab in ILL brings together
  - Potential Supplier lists created in WebILL staff interface
  - From WebILL maintenance module your ILL unit settings and supplier records
- Staff privileges setup in WebILL maintenance module are now setup in the GUI client like other privileges.
Administration tab-Potential suppliers

See what supplier lists an ILL unit is on.

<table>
<thead>
<tr>
<th>Request Media</th>
<th>Level</th>
<th>Seq.</th>
<th>Supplier Name</th>
<th>Locate Base</th>
<th>Randomize</th>
<th>Supp. Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Photocopy (copy)</td>
<td>01</td>
<td>01</td>
<td>University of Minnesota TWIN CITIES (MNNU)</td>
<td>TCNRCAT</td>
<td>N</td>
<td>5</td>
</tr>
<tr>
<td>Copy (electronic)</td>
<td>01</td>
<td>01</td>
<td>University of Minnesota TWIN CITIES (MNNU)</td>
<td>TCNRCAT</td>
<td>N</td>
<td>5</td>
</tr>
<tr>
<td>Printed (loan)</td>
<td>02</td>
<td>01</td>
<td>University of Minnesota TWIN CITIES (MNNU)</td>
<td>TCNRCAT</td>
<td>N</td>
<td>5</td>
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</tbody>
</table>
See your ILL unit setup
Setup

Print_init
Locate Preview
Privileges
Unmediated processing
print_ini – setup how letters to a patron will be delivered.

<table>
<thead>
<tr>
<th>Function Name</th>
<th>ID</th>
<th>Setup</th>
<th>Mail</th>
<th>Local FileName</th>
<th>Target 1</th>
<th>Target 2</th>
<th>Target 3</th>
<th>Target 4</th>
<th>Target 5</th>
<th>Target 6</th>
<th>Target 7</th>
<th>Target 8</th>
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<td>P</td>
<td>pletter.ini</td>
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<td>SendLetter</td>
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<td>N</td>
<td>P</td>
<td>sendlet.ini</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>ReturnLetter</td>
<td>00</td>
<td>N</td>
<td>P</td>
<td>retlet.ini</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>CheckInLetter</td>
<td>00</td>
<td>N</td>
<td>P</td>
<td>checklet.ini</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>ArrivalLetter</td>
<td>00</td>
<td>N</td>
<td>P</td>
<td>arrlet.ini</td>
<td></td>
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<td>SendMsg</td>
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<td>N</td>
<td>P</td>
<td>checkout.ini</td>
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<tr>
<td>SendRemind</td>
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<td>P</td>
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<td>renewmsg.ini</td>
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<td></td>
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<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>RenewRemind</td>
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<td>N</td>
<td>P</td>
<td>renewrem.ini</td>
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<td></td>
</tr>
<tr>
<td>RenewReturn</td>
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<td>N</td>
<td>P</td>
<td>renewret.ini</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
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<td>RenewCheckOut</td>
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<td>N</td>
<td>P</td>
<td>renewcheckout.ini</td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td>RenewReturnCheckOut</td>
<td>00</td>
<td>N</td>
<td>P</td>
<td>renewreturncheckout.ini</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Patron Letter- all Letters connected to the borrowing Print

Arrival Letter- Letter produced when a Receive is done.

ID- used for multi-ILL units correct version of the letter.
<table>
<thead>
<tr>
<th>Application Configuration</th>
<th>0-email</th>
<th>1-print</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Text</td>
<td>[Print]</td>
<td>[Print]</td>
</tr>
<tr>
<td>DefaultPrintEntity</td>
<td>DefaultPrintEntity</td>
<td>DefaultPrintEntity</td>
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<tr>
<td>TempDir</td>
<td>TempDir</td>
<td>TempDir</td>
</tr>
<tr>
<td>TempFileCounter</td>
<td>TempFileCounter</td>
<td>TempFileCounter</td>
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<tr>
<td>NewPrintType</td>
<td>NewPrintType</td>
<td>NewPrintType</td>
</tr>
<tr>
<td>PrintExecute</td>
<td>(PrintExecute)</td>
<td>(PrintExecute)</td>
</tr>
<tr>
<td>EDIT</td>
<td>notepad.exe</td>
<td>notepad.exe</td>
</tr>
<tr>
<td>WORD</td>
<td>C:\Program Files\Microsoft Internet Explorer</td>
<td>C:\Program Files\Microsoft Internet Explorer</td>
</tr>
<tr>
<td>BROWSER</td>
<td>C:\Program Files\Microsoft Internet Explorer</td>
<td>C:\Program Files\Microsoft Internet Explorer</td>
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<tr>
<td>SaxonVersion</td>
<td>Saxon7.jar</td>
<td>Saxon7.jar</td>
</tr>
<tr>
<td>Device1</td>
<td>QL-2100PCL6</td>
<td>QL-2100PCL6</td>
</tr>
<tr>
<td>Device2</td>
<td>Digital DEC laser 3500</td>
<td>Digital DEC laser 3500</td>
</tr>
<tr>
<td>Device3</td>
<td>HP Laserjet 2100 Series PCL 6</td>
<td>HP Laserjet 2100 Series PCL 6</td>
</tr>
<tr>
<td>Device4</td>
<td>Q-SUPPORT</td>
<td>Q-SUPPORT</td>
</tr>
<tr>
<td>Device5</td>
<td>Laserjet 4M Plus</td>
<td>Laserjet 4M Plus</td>
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<tr>
<td>MailServer</td>
<td>smtp.mnsu.edu</td>
<td>smtp.mnsu.edu</td>
</tr>
<tr>
<td>MailServer[1]</td>
<td>smtp.mnsu.edu</td>
<td>smtp.mnsu.edu</td>
</tr>
<tr>
<td>FromAddress</td>
<td><a href="mailto:susan.duise@mnsu.edu">susan.duise@mnsu.edu</a></td>
<td><a href="mailto:susan.duise@mnsu.edu">susan.duise@mnsu.edu</a></td>
</tr>
<tr>
<td>BccAddress</td>
<td>BccAddress</td>
<td>BccAddress</td>
</tr>
<tr>
<td>MailName</td>
<td>ALPH 500 Administrator</td>
<td>ALPH 500 Administrator</td>
</tr>
<tr>
<td>MailName[1]</td>
<td>ALPH 500 Administrator</td>
<td>ALPH 500 Administrator</td>
</tr>
<tr>
<td>CharSet</td>
<td>windows-1252</td>
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<td>ErrorField</td>
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<td>ItemLocationField</td>
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<td>SerialLocationField</td>
<td>SerialLocationField</td>
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<tr>
<td>ItemStatisticField</td>
<td>ItemStatisticField</td>
<td>ItemStatisticField</td>
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<tr>
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</tr>
<tr>
<td>[Vendor]</td>
<td>[Vendor]</td>
<td>[Vendor]</td>
</tr>
<tr>
<td>DuplicateAddress</td>
<td>DuplicateAddress</td>
<td>DuplicateAddress</td>
</tr>
</tbody>
</table>
Editing letters

- ILL letters are in the ALEPH ADM XXX40 form_eng
- Mike has copied the letters from WebILL to ILL2.
- Multiple ILL units in an ADM will have an extension on their letters.
Privileges

Profile: default - user: PAL5101

Login as Another User
Change Current Password
Temporary Password Override
Staff Privileges
Set Workstation Identifier

Modify User to add ILL unit
Access Rights to add ILL
Unmediated processing
Ue19 service runs in the background.
Opt in or opt out- using Borrowing Unmediated Locate
Lending ILL unit- decide if you want the lending locate to be done automatically with ue19. If checked lending locate will occur. If not checked staff must manually locate each request.
Workflow changes

- Create request for a patron
- Patron requests you are not going to fill
- Staff cancel a request
Staff use Search to search for a requested item by title, ISBN, ISSN or other search. Highlight title in the upper pane and then click on ILL request to bring up the request form.
Create Borrowing request using blank form

Blank forms are under Borrowing

Create New Borrowing Serial Request

- Patron ID:
- Level of Service: When convenient
- Title:
- ISSN:
- Year:
- Volume:
- Issue:
- Requested Pages:
- Month/Season:
- Day:
- Title of Article:
- Author:
- Source:
- Patron Note (Free Text):
- Note (Free Text):
- Delivery Information:
- Pickup Location: TST Main Library
- Need by Date: 06/10/2008
- Requested Media: Copy (electronic)
- Media Send Method: Email
- Language: ENG
- Send Directly to Pat
- Willing to Pay Fee
- Copyright Signed
- Allow Other Media

Send
Borrowing requests—when you are not going to request an item for a patron:

Use Change Status to let a patron know you will not request an item.

Change status is available for:
- New
- Locate failed
- Locally owned borrowing requests.
Use Print to send a notice to your patron that you will not request the item.
Cancel - Borrowing request pending at an ILL unit.

Use Response and select Cancel.
If you are going to cancel at all future suppliers, highlight the next supplier and click Delete.
ILL2

- 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
ILL2 Setup

- 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.