



USER DOCUMENTATION

Web ILL User Guide

Ex Libris

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1 Introduction

This document is intended to guide Staff Users in preparing the Web ILL for use with their library setup. It describes the following ILL procedures:

Tasks	Environment
Setting up ILL staff users, ILL Units, suppliers	Web ILL - M (maintenance) interface
Setting up patrons and user records	ALEPH GUI
Setting up potential supplier's profile	Web ILL – Administration interface
Submitting a outgoing ILL request	Web OPAC
Processing outgoing requests	Web ILL – Borrowing interface
Processing incoming requests	Web ILL – Lending interface
Printing and Services	Web ILL – Administration interface

This document assumes that you are familiar with the subject of ILL (Inter Library Loan). It explains

- Important concepts.
- The overall processes you must perform.
- Basic information about the most important tasks you must perform.

For information regarding system setup, configuration and background processes, refer to the *Web ILL Module - Setup and Data Flow* document.

1.1 Glossary

The main components of the ILL workflows are:

- Patrons
- ILL Staff Users
- ILL Units
- Suppliers
- ALEPH interfacing – In the event that your ILL Unit is working in an ALEPH environment

The following is a general explanation for each one of the above:

1.1.1 Patrons

Patrons are the end users who are served by ILL. They are allowed to submit ILL requests on their own. An administrative ILL Unit called an ILL Unit handles a patron ILL request. A default ILL Unit can be defined for each patron or you can set up your ALEPH system to display a list of ILL Units so that the patron can select an ILL Unit when submitting a new ILL request. A patron who does not have an ILL Unit defined in his record and whose system is not set up to let him select an ILL Unit when submitting a request does not have ILL privileges.

All ILL-related circulation activities are registered on the patron record: loan, renew, return, and so on.

The patron can also be a MetaLib user who registers an ILL request from the MetaLib system.

1.1.2 ILL Staff Users

ILL staff users are the staff users who are in charge of processing outgoing ILL requests and handling incoming requests received from other libraries. Each staff user is allowed to access and perform actions in a single ILL Unit. Permitted and denied ILL actions are defined for each user.

1.1.3 ILL Units

An ILL Unit is an administrative unit that handles the ILL activities for a single or group of sublibraries. There are two types:

- **ILL-UNIT for outgoing requests (borrowing library)** - handles the ILL requests for a group of patrons; each patron is handled by a default unit defined in that patron's global information record, or the unit chosen by him.
- **ILL-UNIT for incoming requests (lending library)** - an administrative unit that handles the ILL requests directed to it; it is authorized to lend items from particular sublibraries.

Each ILL Unit must also have a supplier record set in the system.

1.1.4 Suppliers (ILL Partners)

Each ILL partner who requests a item from you, or who responds to your requests for material, must have a supplier record in your system. The suppliers record is a shared record for all ILL libraries and units.

The Potential Suppliers List sets the roster of ILL partners to which an outgoing (borrowing) request is directed. The potential suppliers list is built for each ILL Unit. This list is consulted by the system when the locate of potential suppliers for an outgoing request function is performed in the borrowing library.

If your ILL Unit is working in an ALEPH environment, each supplier must have a global and ALEPH local patron record.

1.1.5 ALEPH Interfacing

If your ILL Unit is working in an ALEPH environment, the ILL activities interface with the ALEPH system. This means:

- All patrons, staff users and suppliers must have patron records set up in your Circulation module.
- All circulation-related activities are registered: loan, renew, recall, overdue and return.
- Patrons' ILL requests can be viewed via the patron's Web OPAC Library Card.

2 Setting Up ILL Staff Users, ILL Units, and Suppliers

Your Web ILL installation contains a special interface called the M (Maintenance) interface, which you use to set up ILL staff users, ILL Units, and suppliers.

The first stage in setup is defining master users for each ILL library.

2.1 Setting Up Master Users

A master user is an ILL library user who is authorized to create new staff members for his ILL library. You do not need to define more than one master user for each ILL library.

To set up a master user:

1. In the address bar of your Web browser, type in the following URL syntax:

`http://<your Web ILL server><your Web ILL port>/M`

For example: <http://goldline.exlibris-usa.com:12001/M>

The following page appears:



The screenshot shows a web page with a blue header containing a logo of two crossed books and the text "INTERLIBRARY LOAN". Below the header, there is a white box with the text "Please use the sign in box to enter Interlibrary Loan Maintenance". Underneath this text are two input fields: "Username:" and "Password:". Below the password field is a "Submit" button.

2. Type the following:

Username: ill

Password: ill

Note:

The *ill* user name and password is only used for setting up master users in Web ILL, and to set up to set ADMIN users: *www-x* and *z39*. You cannot use *ill* to set up staff users permissions, ILL Units and suppliers.

INTERLIBRARY LOAN

Please use the sign in box to enter Interlibrary Loan Maintenance

Username:

Password:

The following screen appears:

INTERLIBRARY LOAN | | [Help](#) | [Log Of](#)

User: ILL ● **You are not authorized to handle suppliers ! (0003)**

ILL Suppliers

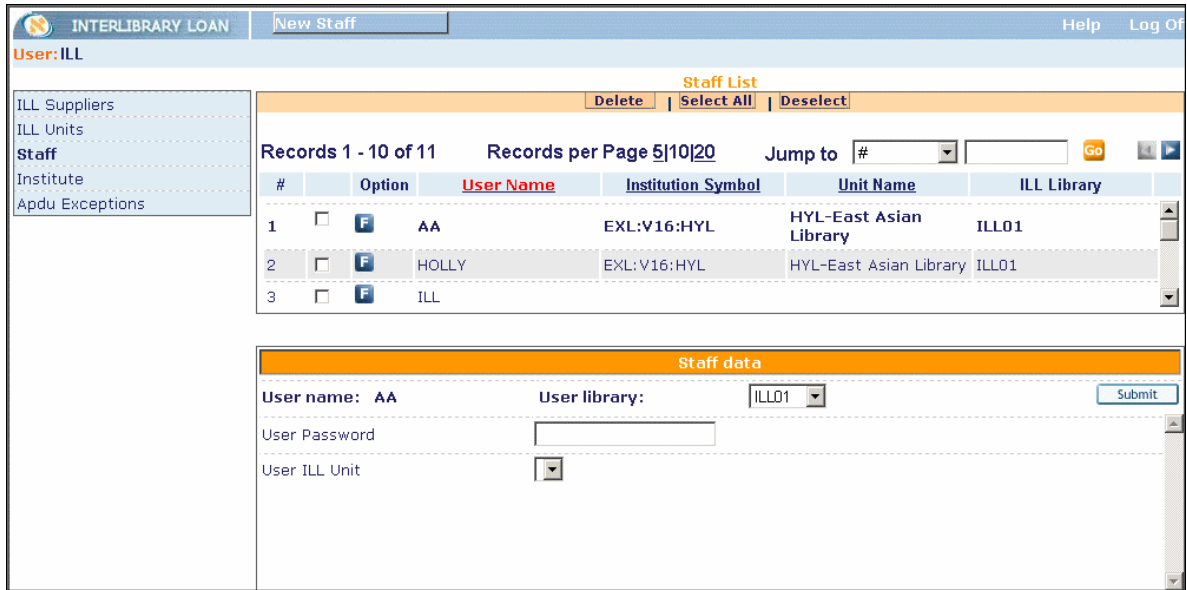
- ILL Units
- Staff
- Institute
- Apdu Exceptions

You are now ready to set up master users.

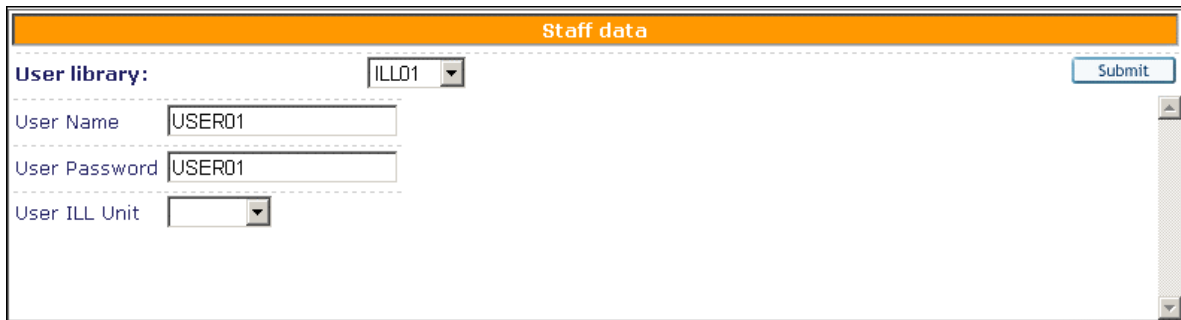
- From the left-pane menu, select **Staff** (this is the only option you can activate with the ill user name):

- ILL Suppliers
- ILL Units
- Staff**
- Institute
- Apdu Exceptions

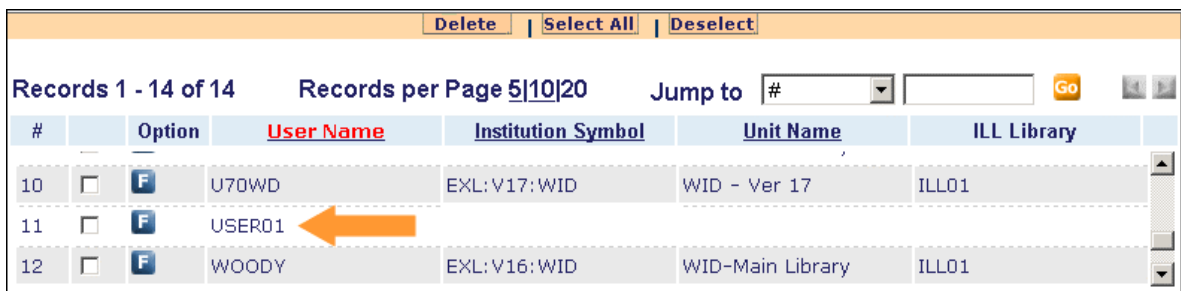
The following screen appears:



4. From the options bar at the top of the screen, click **New Staff**. The following window is displayed:



5. Type a user name and password for each ILL library defined in your system (for example, USER01). Leave the User ILL Unit field empty. When you have finished, click **Submit**. The master user is now set up in the system ready for use:



Make sure you select the correct User Library (ILL Library). For example: If you have three ILL Libraries: ILL01, ILL02 and ILL03, create three master users, one for each library: USER01 for library ILL01, USER02 for library ILL02 and USER03 for library ILL03.

To enable X-Services activities, you must create a WWW-X user. In the New Staff User window (as shown above), select ADMIN as the User library and type:

User Name: WWW-X
Password: WWW-X

WWW-X user must also be set up in ALEPH (see the [Creating Patron Records for ILL Users](#) chapter)

To enable Z39.50 activities, you must create a Z39 user. In the New Staff User window (as shown above), select ADMIN as the User library and type:

User Name: Z39
Password: Z39

The Z39 user must also be set up in ALEPH (see the [Creating Patron Records for ILL Users](#) chapter).

After creating ILL library master users (for example, USER01, USER02 and USER03), log out from the M interface

Once you have set up a master user by following the instructions in this section, you then have to set definitions:

2.1.1 Defining the Master User

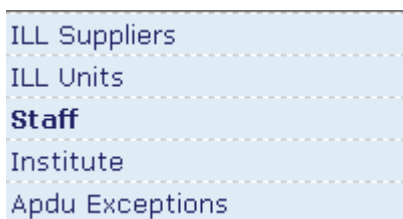
To define a master user:

1. Log in as the master user.
2. Create an ILL Unit for the appropriate ILL library. For instructions for setting up ILL Units, see [Setting Up ILL Units](#).

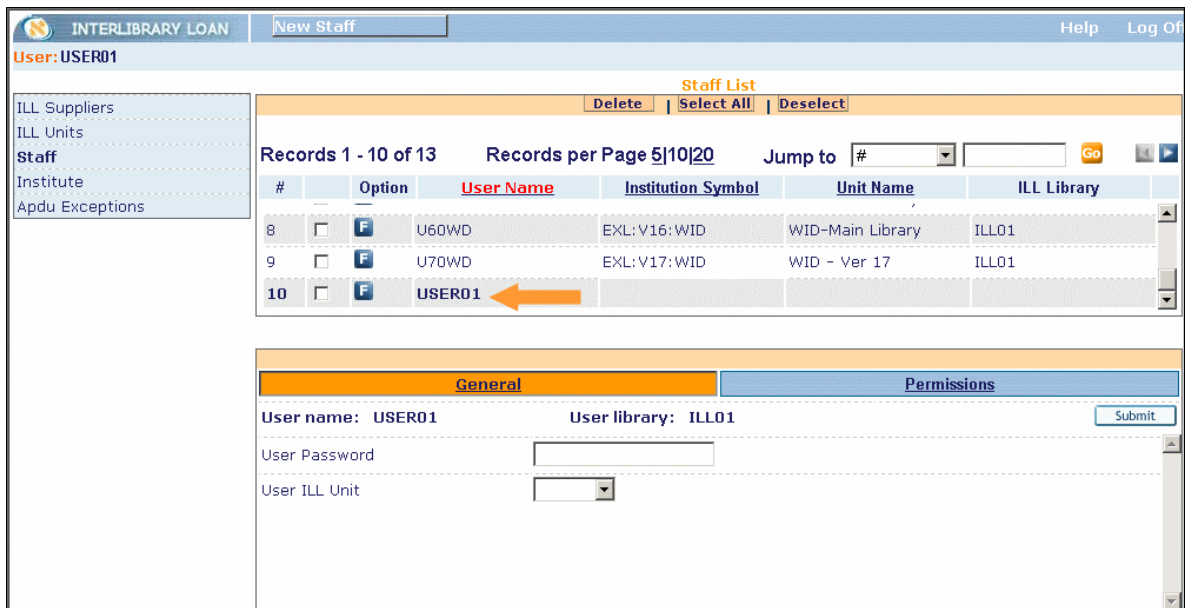
Example:

Log in as a master user USER01 to create ILL Unit: UNIT01 for ILL library: ILL01.

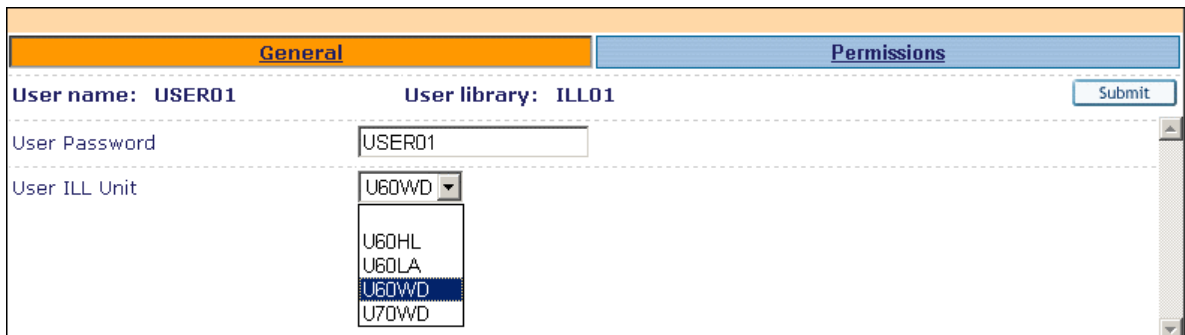
3. After setting up all ILL Units, from the left-hand menu, click Staff:



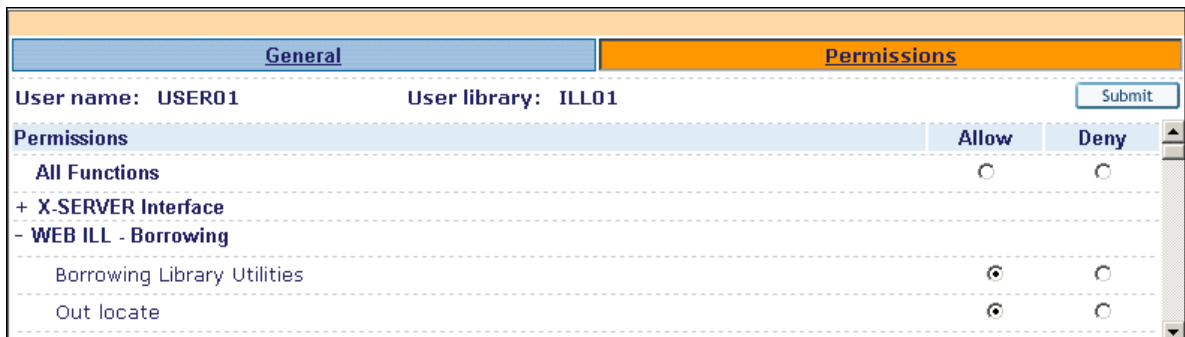
The Staff List window appears:



4. Scroll down to find your newly created master user and click the adjacent **F**. You can now edit the master user's record (for example, ILL01) in the lower pane.
5. In the General tab of the lower pane, select the relent User ILL Unit from the drop-down menu.



6. In the Permissions tab, mark the **Allow/Deny** options to specify to which functions the user is allowed/denied access:



7. Click on the + sign to see all the subfunctions associated with the adjacent function. When you have finished setting permissions, click **Submit**. The user record is now saved in the system.

For the WWW-X user, set the All X server functions permission.

The permissions for the WWW-X user must be set in each ILL Library. Example: Every ILL Library master user must have set permissions for WWW-X.

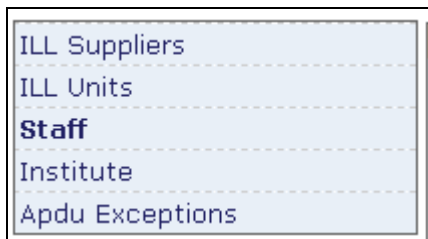
You do not need to set permissions for user Z39.

2.1.2 Setting Up User Records for ILL Library Staff

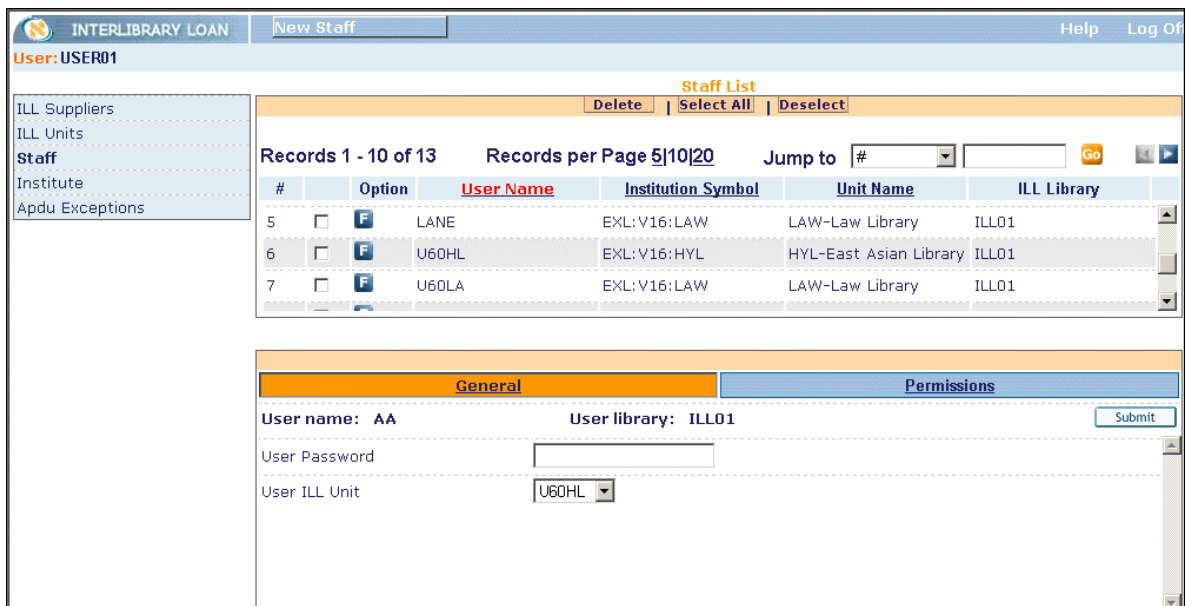
At this stage, you only have staff records set up for the ILL Library master user (USER01), WWW-X and Z39. You now have to set up user records for the actual ILL staff of your ILL library. All created users are assigned to the ILL Library of the user who catalogs them.

To set up a user record for a staff member:

1. Log in as the master user (for example, USER01).
2. From the left-pane menu, select **Staff**:



The following screen appears:



3. From the options bar at the top of the screen, click **New Staff**. The following window is displayed:

New Staff Member

General	Permissions
User library: ILL01 Submit	
User Name	<input type="text" value="DAN"/>
User Password	<input type="text" value="DAN"/>
User ILL Unit	<input type="text" value="U60WD"/> <ul style="list-style-type: none"> U60HL U60LA <li style="background-color: #a4c639;">U60WD U70WD

4. In the General tab, type the user name and password. In the example above, USER01, who is the master user of ILL library ILL01, creates two additional new staff users DAN and SARAH. Both users are automatically assigned to the ILL library ILL01.
5. For each staff member, select the ILL Unit for which the staff user has permissions (in our example, U60WD). The list of ILL Units includes all ILL Units defined for the ILL library.
6. In the Permissions tab, set up appropriate permissions for the user:

General	Permissions	
User library: ILL01 Submit		
Permissions	Allow	Deny
All Functions	<input type="radio"/>	<input type="radio"/>
+ X-SERVER Interface		
- WEB ILL - Borrowing		
Borrowing Library Utilities	<input checked="" type="radio"/>	<input type="radio"/>
Out locate	<input type="radio"/>	<input checked="" type="radio"/>

When you have finished setting permissions, click Submit.

To set up staff members for a different ILL library (for example ILL02), follow these steps:

1. Log out of the M interface and log in as the appropriate master user (that is, USER02).
2. Define ILL Units for this ILL library (ILL02).
3. Complete setup of the master user (USER02) by setting up the ILL Unit field in the General tab and permissions in Permissions tab.
4. Set up the rest of the (non-master) staff users for the new ILL library.
5. Set permissions for the WWW-X ADMIN user.

At this stage you have several staff users for each ILL Library, with each user permitted to access a single ILL Unit.

Note:

Each ILL staff member must have a patron record in your ALEPH system (see the [Creating Patron Records for ILL Users](#) chapter).

2.2 Setting Up ILL Units

There are two types of ILL Units: the ILL Unit for outgoing requests (that is, the borrowing library), and the ILL Unit for incoming requests (that is, the lending library).

- **ILL Unit for outgoing requests (borrowing library)** - handles the ILL requests for a group of patrons; each patron is handled by a default ILL Unit defined in that patron's global information record, or by the ILL Unit chosen by him (depending on library setup).
- **ILL Unit for incoming requests (lending library)** - an administrative unit that handles the ILL requests directed to it, and is authorized to lend items from particular sublibraries.

Normally, an ILL Unit will be set up as both a borrowing and a lending library.

Each ILL Unit record must have a corresponding supplier record, which has the same code as the ILL code. Upon submitting a new ILL Unit, the system automatically creates an ILL supplier record with the same supplier code as the ILL Unit code. This initial supplier has default values based on the values taken from the ILL Unit record and its Locate Type field is Unit Management. This automatically-created supplier record should be reviewed and manually updated if need be (for example, check for missing supplier fields, Institution Symbol, ILL Service Address and Name fields).

ILL Units are set up by ILL Library master users. Each master user creates his own ILL Library ILL Unit. For example, USER01 creates ILL Units for library ILL01.

To set up an ILL Unit, follow these steps:

1. Log in as a master user, for example, USER01, and click .



INTERLIBRARY LOAN

Please use the sign in box to enter Interlibrary Loan Maintenance

Username:

Password:

The M interface appears, open at the ILL Suppliers list:

INTERLIBRARY LOAN | New Supplier | Help | Log Off

User: USER01

ILL Suppliers List | Delete | Select All | Deselect

Records 1 - 4 of 4 | Records per Page 5|10|20 | Jump to # [] [Go] [] []

#	Option	Code	Institution Symbol	ILL Service Address	Name
1	<input type="checkbox"/> F	U60HL	EXL:V16:HYL	10.1.235.47:9001	HYL-East Asian Library
2	<input type="checkbox"/> F	U60LA	EXL:V16:LAW	10.1.235.47:9001	LAW-Law Library
3	<input type="checkbox"/> F	U60WD	EXL:V16:WID	10.1.235.47:9001	WID-Main Library

Address | General | Locate

Internal Code: U60HL | Submit

Institution Symbol: EXL:V16:HYL

ILL Service Address: 10.1.235.47:9001

Open Date: 26/04/04

Update Date: 15/06/04

Name: HYL-East Asian Library

POB: []

2. From the left-pane menu, select ILL Units:

ILL Suppliers

ILL Units

Staff

Institute

Apdu Exceptions

The following screen appears:

INTERLIBRARY LOAN | New ILL Unit | Help | Log Off

User: USER01

ILL Units List | Delete | Select All | Deselect

Records 1 - 4 of 4 | Records per Page 5|10|20 | Jump to # [] [Go] [] []

#	Option	Code	Institution Symbol	Name	ILL Lib.	Circ. Type
1	<input type="checkbox"/> F	U60HL	EXL:V16:HYL	HYL-East Asian Library	ILL01	ALEPH
2	<input type="checkbox"/> F	U60LA	EXL:V16:LAW	LAW-Law Library	ILL01	ALEPH
3	<input type="checkbox"/> F	U60WD	EXL:V16:WID	WID-Main Library	ILL01	ALEPH

General | Pickup | Circ. Handling | Auto Process

Internal Code: U60HL | Submit

Open date: 26/04/04

Update Date: 15/06/04

Cataloger: INITIAL

Incoming Handling Allowed? Yes No

Outgoing Handling Allowed? Yes No

Check Local Ownership No Yes (No availability check) Yes (Include availability check)

ILL Library: ILL01

- From the options bar at the top of the screen, click **New ILL Unit**. The New ILL Unit window, which has four tabs, is displayed. Each tab is described in the New ILL Unit Window section below.
- After filling in the fields, click **Submit**. The new ILL Unit is saved in your system.

2.2.1 The New ILL Unit Window

The New ILL Unit Window contains four tabs:

- General
- Pickup
- Circ. Handling
- Auto Process.

These tabs are described below.

General

New ILL Unit	
General	Pickup
	Circ. Handling
	Auto Process
Internal Code	<input type="text" value="S60GD"/>
Incoming Handling Allowed?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Outgoing Handling Allowed?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Check Local Ownership	<input type="radio"/> No <input checked="" type="radio"/> Yes (No availability check) <input type="radio"/> Yes (availability check)
ILL Library	<input type="text" value="USM20"/>
ILL Staff Request Type	<input type="text" value="01"/>
Authentication Library	<input type="text" value="USM50"/>
Authentication Type	<input type="text" value="ALEPH"/>
Authentication Server	<input type="text" value="10.1.235.19:8995"/>
BIB Server	<input type="text" value="10.1.235.19:8995"/>
BIB Retrieval Type	<input type="text" value="ALEPH"/>

Internal Code

Contains the ILL Unit code. The display of ILL records in the ILL Web interface is filtered by the ILL Unit. This means that when the staff user is logged into the interface, only those ILL records that are assigned to his authorized ILL Unit will be displayed.

Incoming Handling Allowed?

Select Yes if you want to allow this ILL Unit to be active as a Lending Library. If you want to block incoming request operations, select No.

Outgoing Handling Allowed?

Select Yes if you want to allow this ILL Unit to be active as a Borrowing Library. If you want to block outgoing request operations, select No.

Check Local Ownership

This field defines whether or not the ILL Unit will first check for self ownership when locating a potential supplier for an outgoing request.

There are three check levels:

- **No Check** – value 0: the check for self ownership will not be performed at all.
- **Check without Item Availability** – value 1: self check ownership will be performed before the outgoing request **Locate for Potential Suppliers** process begins. The system will check for matching BIB and ADM records with linked item/s. The availability of the found item/s is not checked.
- **Check with Item Availability** – value 2: The request will be flagged as **Locally Owned** if BIB and ADM records with an available item have been found.

The status the request will be given as a result of local ownership is specified in fields which are defined in the Auto Process tab. Note that the self ownership check is performed only for the first **Locate** attempt (locate potential suppliers for an outgoing request). When additional attempts to find potential suppliers are carried out for a request which has already been designated as **Locally Owned**, the self ownership check is not performed again and the locate of a potential supplier is not blocked.

ILL Library

Select the ILL BIB library for the ILL Unit. The ILL library is a repository of BIB information for outgoing and incoming requests.

ILL Staff Request Type

Select the Request Type for the staff authorized for the ILL Unit.

For ILL systems that use ALEPH Administrative data (for example, patron record files and items records are managed by the ALEPH system), select type 01.

For an ILL system that does not have an ALEPH Administrative database, select type 02.

Authentication Library

Select the ADM library against which the authentication check is made.

Authentication Type

Select the type of system against which you want to perform a user authentication check. For example, ALEPH, ALEPH PDS (Patrons Directory Service) or ALEPH METALIB.

Authentication Server

Type in the IP Address: ILL Web Port Number (for example, 12.123.1.25:8995) in which the authentication check is performed.

BIB Server

Type in the IP Address: ILL Web Port Number (for example, 12.123.1.25:8995) where your library's bibliographic data is stored.

BIB Retrieval Type

Select the type of bibliographic records to be retrieved from the BIB server.
For example: ALEPH, METALIB.

Pickup

General	Pickup	Circ. Handling	Auto Process
Internal code: S60GD			Submit
Pickup Locations			
<input checked="" type="checkbox"/> East Asian Library (HYL)		<input type="checkbox"/> Main Library (WID)	
<input type="checkbox"/> Law Library (LAW)			

Pickup Locations

Check the sublibraries from which the ILL Unit's patrons are allowed to pick up their requested ILL material when it arrives. The sublibraries selected will be listed in the drop-down menu of the Pickup Location field of the OPAC ILL Request form.

Circulation Handling

This tab defines various parameters involved in the circulation of interlibrary loans and the lending library.

New ILL Unit			
General	Pickup	Circ. Handling	Auto Process
Submit			
Lending library			
Circ. Library	USM60		
Circ. Handling Type	ALEPH		
Circ. Server	10.1.235.19:8995		
Circ. Locate Base	ARCV 15		
Circ Sublibraries			
<input checked="" type="checkbox"/> Archives 15		<input type="checkbox"/> Education 15	
<input type="checkbox"/> Health 15		<input type="checkbox"/> Science 15	
<input type="checkbox"/> Electronic 15		<input type="checkbox"/> East Asian Library (HYL)	
<input type="checkbox"/> Main Library (WID)		<input type="checkbox"/> Law Library (LAW)	

Circulation Library

Select the ADM library in which the circulation transaction will be registered when the ILL Unit is used as a lending library.

Circulation Handling Type

Select the way in which the interlibrary loan interacts with the circulation system. If your library system manages its circulation data in ALEPH, select ALEPH. This will prompt the

system to automatically trigger circulation transactions as a result of ILL activities (for example, loans, return, renewal).

In addition, the Locate procedure for matching a record for supply will include the item availability check. If your circulation data is not managed by ALEPH, but by another system, select the ITEMLESS option. ITEMLESS prompts the system not to trigger circulation activities, and the Locate procedure for matching a record for supply is performed only at the level of bibliographic matching.

Circulation Server

Type in the circulation IP Address: ILL Web Port Number

Circulation Locate Base (for incoming requests)

Select the library base in which the system will attempt to find a matching record for supply.

Circulation Sublibraries (for incoming requests)

Set the sublibraries to which an item loaned by this ILL Unit must belong. An item can not be loaned by this ILL Unit if it does not belong to one of these sublibraries.

Automatic Process

The screenshot shows a web form titled "New ILL Unit" with four tabs: "General", "Pickup", "Circ. Handling", and "Auto Process". The "Auto Process" tab is selected and highlighted in orange. A "Submit" button is located in the top right corner of the form area. The form is divided into two sections: "Lending library" and "Borrowing library".

Lending library	
Item Locate Failed (Loan)	Answer Unfilled
Item Locate Failed (Copy)	Mediated
Item Availability Failed (Loan)	Mediated
Item Availability Failed (Copy)	Mediated

Borrowing library	
Self Ownership Found (Loan)	Locally Owned
Self Ownership Found (Copy)	Locally Owned

This tab defines parameters for the ILL Unit unmediated process. The first four fields are related to incoming requests; and the last two fields are related to outgoing requests.

Item Locate Failed (Loan) (for incoming requests)

Select the request status that will be set to an incoming request which fails to find a matching BIB record when the request is for a loan. Supported options are: Mediated and Unfilled. If Unfilled is selected, the failed BIB locate will also trigger an automatic dispatch of Answer-Unfilled to the requester.

Item Locate Failed (Copy) (for incoming requests)

Same as previous field but for an incoming request that is for a copy.

Item Availability Failed (Loan) (for incoming requests)

Select the request status that will be set to an incoming request for which a BIB record was located, but no available item was located for loaning when the request is for a loan. There can be various reasons for this, such as the items do not belong to the permitted sublibraries, or because the items are already on loan. Supported options are: Mediated and Unfilled. If Unfilled is selected, the failed BIB locate will also trigger an automatic dispatch of Answer-Unfilled to the requester.

Item Availability Failed (Copy) (for incoming requests)

Same as previous field but for an incoming request that is for a copy.

Self Ownership Found (Loan) (for outgoing requests)

Select the request status that will be set to an outgoing request which is for a loan if the requested item was located as a self owned item. Note that the Self Ownership Check is performed only if the Check Local Ownership field of the ILL Unit (General tab) is set to one of the following two options: Check without Item Availability or Check with Item Availability.

Self Ownership Found (Copy) (for outgoing requests)

Same as previous field but for an outgoing request that is for a copy.

2.3 Setting Up ILL Suppliers

All ILL Units and libraries share the same supplier records.

Each ILL Unit must have a supplier record (an initial supplier record is created automatically by the system when a new ILL Unit is created).

Note
A supplier record must also exist for your own ILL Unit.

For each supplier record, set up a global and local patron record in your ALEPH system (see details in the [Creating Patron Records for ILL Users](#) chapter).

To set up an ILL Supplier, follow these steps:

1. Log in as a master user, for example, USER01.
2. From the left-pane menu, select ILL Suppliers:



The Suppliers List appears:

The screenshot shows the 'ILL Suppliers List' interface. At the top, there is a navigation bar with 'INTERLIBRARY LOAN' and 'New Supplier' buttons. Below this is a user identification bar 'User: USER01'. The main content area is divided into a left sidebar with a menu (ILL Suppliers, ILL Units, Staff, Institute, Apdu Exceptions) and a central table. The table has columns for '#', 'Option', 'Code', 'Institution Symbol', 'ILL Service Address', and 'Name'. It displays three records. Below the table, there are three tabs: 'Address', 'General', and 'Locate'. The 'Address' tab is active, showing a form for the selected supplier 'U60HL' with fields for 'Institution Symbol', 'ILL Service Address', 'Open Date', 'Update Date', 'Name', and 'POB'.

#	Option	Code	Institution Symbol	ILL Service Address	Name	
1	<input type="checkbox"/>	F	U60HL	EXL:V16:HYL	10.1.235.47:9001	HYL-East Asian Library
2	<input type="checkbox"/>	F	U60LA	EXL:V16:LAW	10.1.235.47:9001	LAW-Law Library
3	<input type="checkbox"/>	F	U60WD	EXL:V16:WID	10.1.235.47:9001	WID-Main Library

Address	General	Locate
Internal Code: U60HL		
Institution Symbol: EXL:V16:HYL		
ILL Service Address: 10.1.235.47:9001		
Open Date: 26/04/04		
Update Date: 15/06/04		
Name: HYL-East Asian Library		
POB:		

- From the options bar at the top of the screen, click **New Supplier**. The New Supplier window, which has three tabs, is displayed. Each tab is described in the New Supplier Window section below.
- After filling in the fields, click **Submit**. The new ILL Supplier is saved in your system.

2.3.1 The New ILL Supplier Window

The New ILL supplier window is divided into three tabs.

- Address
- General
- Locate

These tab are described below.

Address

New Supplier	
Address	General
	<input type="button" value="Submit"/>
Internal Code	<input type="text" value="WID"/>
Institution Symbol	<input type="text" value="EXL:WID:41556"/>
ILL Service Address	<input type="text" value="10.1.235.65:6001"/>
Name	<input type="text" value="JAR-Main Library"/>
POB	<input type="text" value="2115"/>
Street Number	<input type="text" value="53"/>
City	<input type="text" value="NJ"/>
Region	<input type="text"/>
Zip Code	<input type="text" value="25413"/>
Country	<input type="text" value="USA"/>

Internal Code

The supplier's internal code.

Institution Symbol

The supplier's institution ISO-compliant System ID (instructs the recipient of the APDU how to address the initiator of the APDU).

ILL Service Address

The supplier's ILL service address to which all APDU messages for the supplier are sent. If the supplier is capable of receiving APDU messages using TCP/IP protocol, the format for this field will be: IP Address: ILL Server Port Number. For example: 125.78.23.100:9006

If the supplier is able to receive messages only by using SMTP protocol, this field will contain the supplier server mail address. For example: oclc@14.4.254.25.

Address Information Fields

The rest of the fields of this tab contain free text address information of the supplier.

General

New Supplier		
Address	General	Locate
<input type="button" value="Submit"/>		
Default Order Delivery	<input type="text" value="ISO TCP/IP"/>	
Return Delivery Delay	<input type="text" value="004"/>	
Note	<input type="text"/>	
Status	<input type="text" value="AC"/>	
Conversation Language	<input type="text" value="English"/>	
Currency	<input type="text" value="US Dollar"/>	
Contact 1	<input type="text" value="John"/>	
Contact 2	<input type="text" value="Rachel"/>	
Contact 3	<input type="text"/>	
Contact 4	<input type="text"/>	
Contact 5	<input type="text"/>	

Default Order Delivery

Select the protocol in which the APDU messages are sent to the supplier.

If the supplier is capable of receiving APDU via TCP/IP, select ISO TCP/IP.

If the supplier is able to receive messages only via SMTP, select ISO SMTP.

The Server address (for TCP/IP) or the server's mail address (for SMTP) is defined in the ILL Service Address field of the supplier record-tab1.

Return Delivery Delay

In the borrowing library, this field defines the expected delay in the delivery of an item when the loaned item is returned to the supplier. Type up to three digits (for the number of days).

When an item is received for loan, the supplier specifies a date by which it must be returned (the Expected Return Date). You may require the patron to return the item to the library a few days before this date, to allow time for dispatch to the supplier. The number of days you wish to allow for processing can be entered here. The value entered here acts as a default for the 'Return Delivery Delay' field in the Potential Supplier record.

Note

This field allows you to enter a free text note related to the supplier.

Status

Type in the supplier status, for example, Domestic, Foreign, Distributor, and so on.

Note

If NA is entered in this field, the supplier will be considered a non-active supplier and will not be used by the system when locating potential suppliers for an outgoing request.

Language

Select the supplier language.

Currency

Select the supplier currency.

Contact Person 1-5

Up to five supplier contact persons can be entered in these 5 fields.

Locate

The Locate tab form stores information used by the system when the supplier is involved with the Locate process for potential suppliers for an outgoing request. It indicates the method in which the locate is performed.

Address	General	Locate
Internal Code: U60WP		Submit
Locate Type	ALEPH ILS Handling	
Locate Library	USM50	
Locate Server	10.1.265.13:8991	
Locate Base	WID	

Locate Type

Select the Locate Type for this supplier. The Locate Type is consulted by the system when there is an attempt to locate the supplier for an outgoing request. Possible Locate Types are:

ALEPH ILS Handling – The supplier uses ALEPH as its library system and the Circulation Administrative data is held in ALEPH format. For this locate type, when the locate of a potential supplier is performed, the system attempts to locate a matching BIB record in the supplier library and an available item. The locate will end successfully only if the available item which is found for supply is located in the supplier's library. Otherwise, the system will not add that supplier as a potential supplier to fill the request.

ALEPH UC (Union Catalog) Handling - The supplier uses ALEPH as its library system but the Circulation Administrative data is not in ALEPH format. For this locate type, when the Locate of a potential supplier is performed, the system attempts to locate a matching BIB record in the supplier library. There is no item availability check. The locate will end successfully as soon as a matching BIB record is found.

Unit Management – The supplier is one specified in your ILL Unit. In this case, the locate procedure is the same as that used for the ALEPH ILS Handling type.

External System – The supplier uses an external system and the search is done using the z39 gate. You must have z39 gate configuration for the supplier's base. For this Locate Type, when the Locate of a potential supplier is performed, the system attempts to locate a matching BIB record in the supplier library. There is no item availability check. The locate concludes successfully as soon as a matching BIB record is found.

For each Locate Type the additional three fields of this tab: Locate Library, Locate Server and Locate Base, all respond in a different way.

For ALEPH ILS and ALEPH UC Locate Types:

Select the **Locate Library**.

Type in the **Locate Server** - IP Address and Web Port Number (for example 10.1.237.17:5558).

Upon submitting the supplier record, the system will add a **Locate Base** field. This field is the base in which the system will try to locate a matching record when attempting to locate the supplier for an outgoing request. This field cannot be filled while editing a new supplier record. After submitting a new record, fill in the relevant Locate Base by updating the existing supplier record.

For Unit Management Locate Type:

All three fields—Locate Library, Locate Server and Locate Base—are taken from the corresponding ILL Unit, which has the same code as the supplier code. When a new ILL Unit is added, the system automatically creates a corresponding supplier record with a Locate Type of Unit Management.

For External System Locate Type:

When creating a new supplier with a Locate Type of External, none of the three fields—Locate Library, Locate Server and Locate Base—should be filled. After submitting a new record, fill in the relevant locate external base by updating the existing supplier record. The selected base must have z39_gate configuration where the locate server and locate library are defined.

3 Creating Patron Records for ILL Users

Use the ALEPH GUI system to set ILL environment components: Patrons and Users record. This chapter outlines setup information for different types of ILL users. For more detailed information about creating patron records, refer to the *ALEPH User Guide, Circulation* module.

3.1 Setting Up Patron Records For ILL Staff Users

In the ALEPH system, in order to enable ILL staff users to register ILL requests on behalf of library patrons, you must create patron records for the ILL staff users.

To do this, use the Circulation GUI to create a patron record. Make sure that the Patron ID is the same as the Staff User name, and that the Patron PIN code is the same as the Staff Password.

The screenshot displays the ALEPH GUI for creating a patron record. It is divided into two main sections: '1. Global Patron Details' and '2. Global Blocks and Notes'.
1. Global Patron Details:
- Open Date: 14/04/04, Update Date: 14/04/04
- Patron ID: U60WD, Pincode: ILL
- Barcode: ILL125, Barcode Verification: ILL
- Name: U60WD ILL WID Staff
- Title: (empty), Date of Birth: 00/00/0000
- ILL Library: U60WD, Language: ENG
- ILL Total Limit: 9999
- ILL Active Limit: 9999
- Sponsor's ID: (empty)
- Primary ID: (empty)
- Proxy Type: 00
2. Global Blocks and Notes:
- Global Block 1: 00
- Global Block 2: 00
- Global Block 3: 00
- Global Note 1: ILL-TYPE=01
- Global Note 2: (empty)
- Global Note 3: (empty)
- "Patron Loader" Protected Fields:
 - Complete Record
 - Patron Addresses
 - E-mail Address
 - Patron Status
 - Expiration Date

Special fields for ILL setup:

ILL Library / Unit

Type in the code of the staff user's ILL Unit.

In addition, create an ALEPH Local patron record. The values are irrelevant.

ILL Total/Active Limit

Define unlimited values (9999). ILL Total Limit specifies the maximum number of ILL requests that a borrower can place in a library-defined period. The ILL Active Limit field specifies the maximum number of ILL requests that a borrower can have active at any one time.

Global Note 1

Type the value ILL-TYPE=01. For a 'patronless' ILL system (patron details are manually entered on each request), use ILL-TYPE=02.

3.2 Setting Up Patron Records for ILL Suppliers

In order to allow circulation transactions for the ILL suppliers (loan, return, recall and renew), each ILL supplier must have a global and a local patron record in the ALEPH system.

To set up a patron record for an ILL supplier, use the Circulation GUI interface. Create a global patron record for the ILL supplier, entering at least the following:

Global Patron Information

- Patron ID: ILL Supplier Code
- Name: ILL Supplier Name
- Pin Code, Barcode, Barcode Verification and Language (can be system-generated)

ALEPH Local Patron Information

- Status: ILL Borrower Status
- Expiry Date: Dec.31, 2099
- Photo Charge: F
- Privileges: irrelevant, but must be set

3.3 Setting Up ILL Permissions for Patrons (End-users)

In order to enable a patron to submit ILL outgoing requests, you must set up the patron's ILL rights:

Global Patron Information

ILL Library / Unit

Type the ILL Unit to handle the patron's outgoing ILL requests. If the ILL library is not defined for the patron, you can set your ALEPH system (using alephe/tab/tab_ill_unit.eng) to display a list of ILL Units so that the patron will have the option of selecting an ILL Unit when submitting a new ILL request. A patron who does not have an ILL library and whose system is not set to let him select an ILL Unit when submitting the request does not have ILL privileges.

ILL Total/Active Limit

You must enter values

3.4 Creating Patron Records For The WWW-X And Z39 Users

You must set up staff user patron records must be set for the system's ADMIN users: WWW-X and Z39.

WWW-X must have permissions for the BIB, ADM, and user libraries. For Z39 – no specific permissions are required.

4 Managing Potential Suppliers

The Potential Suppliers List sets the roster of ILL partners to which an outgoing (borrowing) request is directed. It defines the ILL supplier profiles for the ILL Unit to which the user is logged in. The potential suppliers list is consulted by the system when the Locate function is performed in the borrowing library (also known as the Borrowing Locate). The Locate procedure attempts to locate potential suppliers for an outgoing request according to the profile defined in the potential supplier roster. The Locate function can be triggered manually by the ILL staff user or by a batch service that locates potential suppliers to new outgoing ILL requests (Borrowing Library - Automatic Processing (ill-13)).

For each potential supplier, the media type, locate base, level, randomize flag, average supply days, expiry days and return delivery delay are defined.

When the system deals with a new ILL request to determine potential suppliers, the Locate function is performed on each supplier one at a time.

You manage the Potential Suppliers List via the ILL Staff (L) interface.

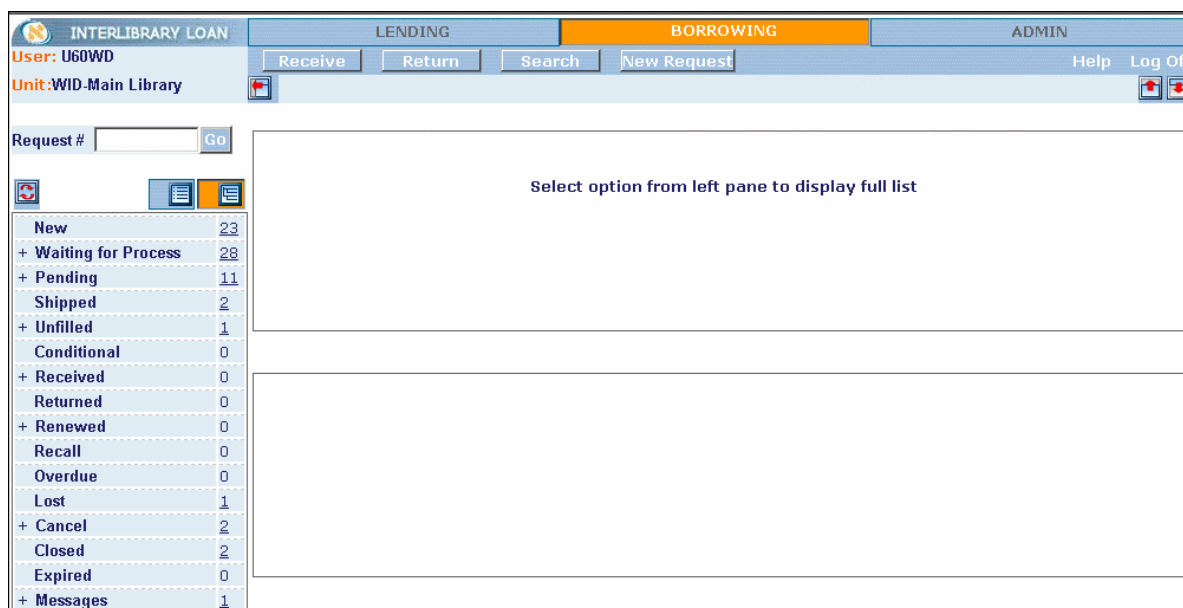
To access the ILL staff interface:

1. In the address bar of your Web browser, type in the following URL syntax:

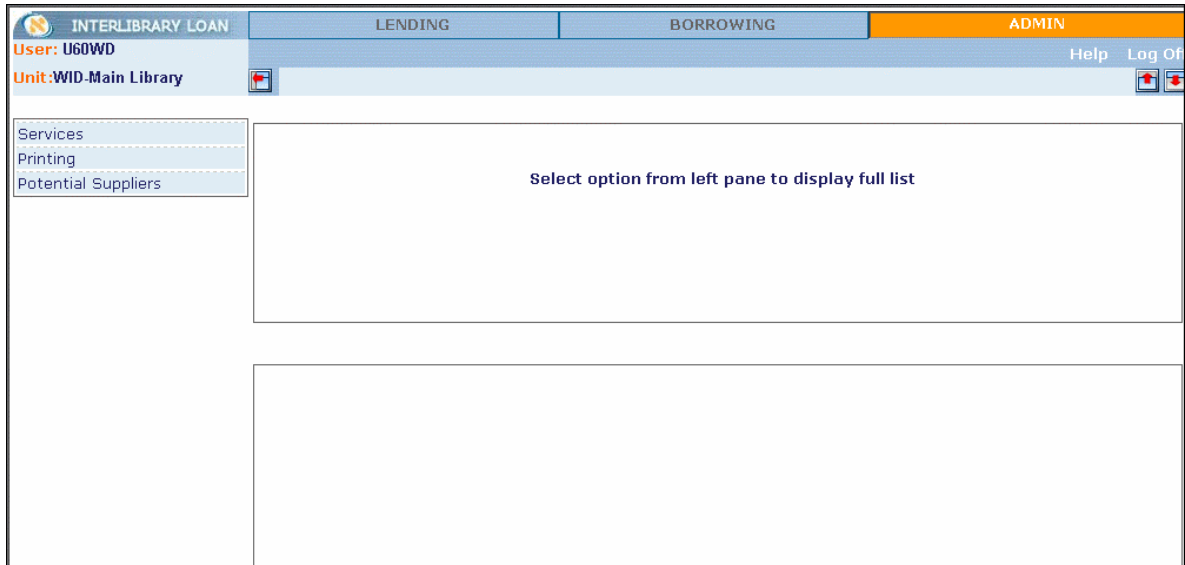
`http://<your Web ILL server><your Web ILL port>/L`

<http://goldline.exlibris-usa.com:12001/L>

2. Log in as a registered ILL user (for example, U60WD). The following screen appears:



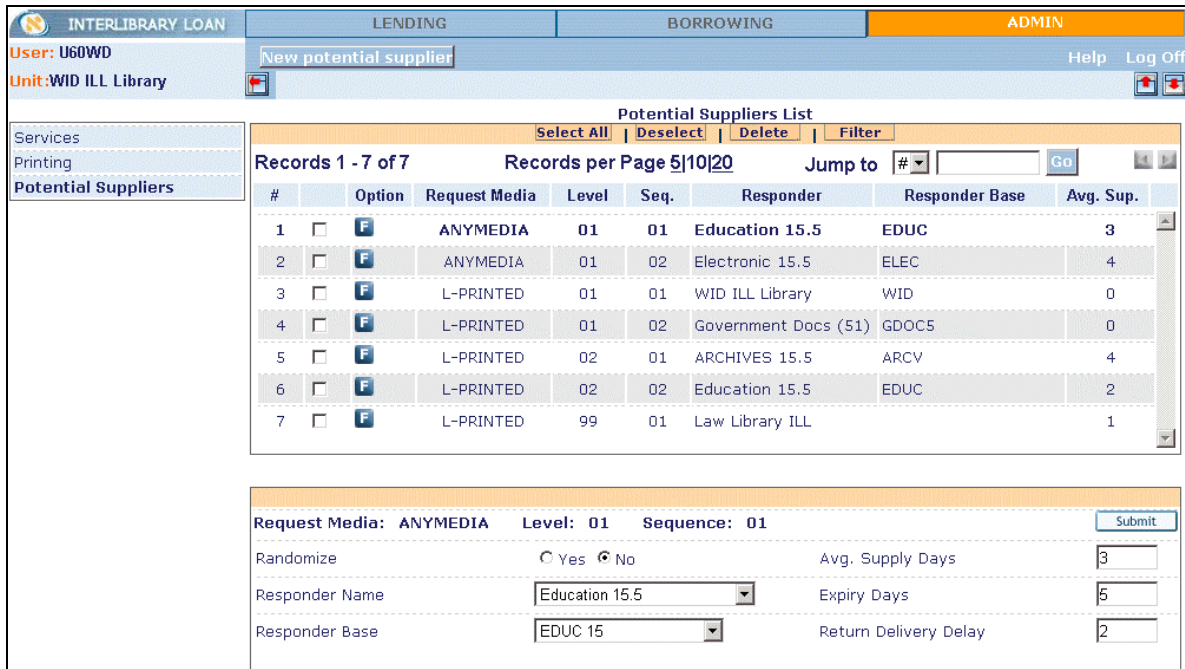
3. Click the ADMIN tab. The following screen displays:



4. Click the Potential Suppliers option in the left pane:



The Potential Suppliers node displays, enabling you to manage the list of potential suppliers for your ILL Unit.



Potential Suppliers List

Upper Pane

The upper pane for Potential Suppliers option contains the list of potential suppliers defined by your ILL Unit and grouped by Request Media, Level and Sequence within the level.

To filter the Potential Suppliers List:

Click **Filter**. This enables you to display only suppliers matching the selected filter categories - Request Media and Level:



After the filtering has been applied, you can change the order of suppliers within the suppliers group by clicking **Rearrange** (appears after filtering has been carried out).

Lower Pane

The Lower pane of the Potential Suppliers List presents the full record of the supplier selected in the upper pane list. It contains the relevant supplier information regarding supplier name, base, average supply days, expiry days, and delivery delay.

To edit this information, change the details of the Supplier record and click **Submit**.

4.1 Adding A New Potential Supplier

To add a new supplier to the list, follow these steps:

1. From the option bar at the top of the screen, click **New potential supplier**. The New Potential Supplier Form appears (shown below).
2. Fill in the relevant information in the blank form and click **Submit**. The new potential supplier is now saved in the ILL system.

When editing a new potential supplier profile, set the following:

New Potential Supplier			
Request Media	Printed (Loan)	Level	01
Randomize	<input type="radio"/> Yes <input checked="" type="radio"/> No	Avg. Supply Days	4
Responder Name	Law Library ILL	Expiry Days	7
Responder Base	LAW-Law Library	Return Delivery Delay	3
<input type="button" value="Submit"/>			

Requested Media

Select the requested media and the format in which you want to create the profile entry. The media codes **MUST** be one of the following: PRINTED, COPY, MICROFORM, VIDEO, AUDIO, MR, OTHER. Use these only with a prefix of L-, E- or C-. L for loan request, C for photocopy request and E for electronic copy. For example: L-PRINTED, C-COPY, E-OTHER.

In order to add new suppliers manually to a request's potential suppliers list, regardless of the request's media, use ANYMEDIA in the Requested Media field. ANYMEDIA must not have a prefix.

Randomize

The Randomize selection is valid for the whole group level. Therefore, this field is valid only for the first entry (first sequence) of each level. If you want the order of the search for potential suppliers to be randomized within the level, select Yes. If you want the search to be performed within the group according to the order listed, select No.

Responder Name

Select the supplier name. The system automatically lists all suppliers that are registered in your system.

Responder Base

Select the supplier base in which the system attempts to locate a matching BIB record. If the supplier's Locate Type is Unit Management, ALEPH ILS or ALEPH UC, the locate will end successfully (i.e., the supplier will be assigned to the request) only if an item available for supply has been found in the supplier's base. If the Responder Base field is left empty, this field will be filled with the base defined in the Locate Base field of the supplier record.

Level

Select the group level for the supplier profile entry. For each request's media type, the system starts the locate with group level 01 through 98. Each media type can have a "Last Resort" supplier, defined by group level 99. The Locate check is not performed for the 99 supplier, and consequently, the Responder Base field should be left empty for level 99. The order of the search within a single level may or may not be randomized (as defined in the Randomize field).

Average Supply Days

This option defines the average number of days needed for the supplier to supply the requested item (per specific media). This parameter is consulted by the system when the borrowing locate is performed: if the request Need Before Date parameter is earlier than the

current date (the Locate Date) plus the average number of supply days, the supplier will not be included in the potential supplier list of the request. The second time this parameter is consulted is when the Send is performed (Send Request to Supplier). If the request Need Before Date parameter is earlier than the current date (Send Date) plus an average number of supply days, the supplier's request is not sent out and its status changes to No Time to Supply (NTS).

Expiry Days

Defines the number of days after which the request expires. Each request that was sent to a supplier but no response was received within the number of days defined in this field can be declared as expired (and an EXPIRED message can be sent manually or by running the Borrowing Library - Expired Messages- ill-15 service).

Return Delivery Delay

Defines the expected delay in the delivery of an item when the loaned item is returned to the supplier. Type in up to three digits (for the number of days). When an item is received for a loan, the supplier specifies a date by which it must be returned (the Expected Return Date). You may wish to ensure that the patron returns the item to the library a few days before this date, to allow time for dispatch to the supplier. The number of days you wish to allow for processing may be entered here.

If you leave this value set to zero, the system will use the Return Delivery Delay parameter which is set in the supplier record, if this is also left empty, a system-wide default value will be used.

5 Managing Outgoing (Borrowing) ILL Requests

You can carry out the following ILL borrowing workflows via the ILL staff interface:

1. Creating New Requests
2. Locating Suppliers
3. Sending Requests (**LENDER** works on request)
4. Receiving Material
5. Returning Material (in the case of a 'loaned' item)

In addition to the above basic ILL activities, you can also carry out additional transactions such as:

- Borrowing library requests for renewal
- Borrowing library declaration of loaned item as Lost/Damaged
- Borrowing library sending of free-text message

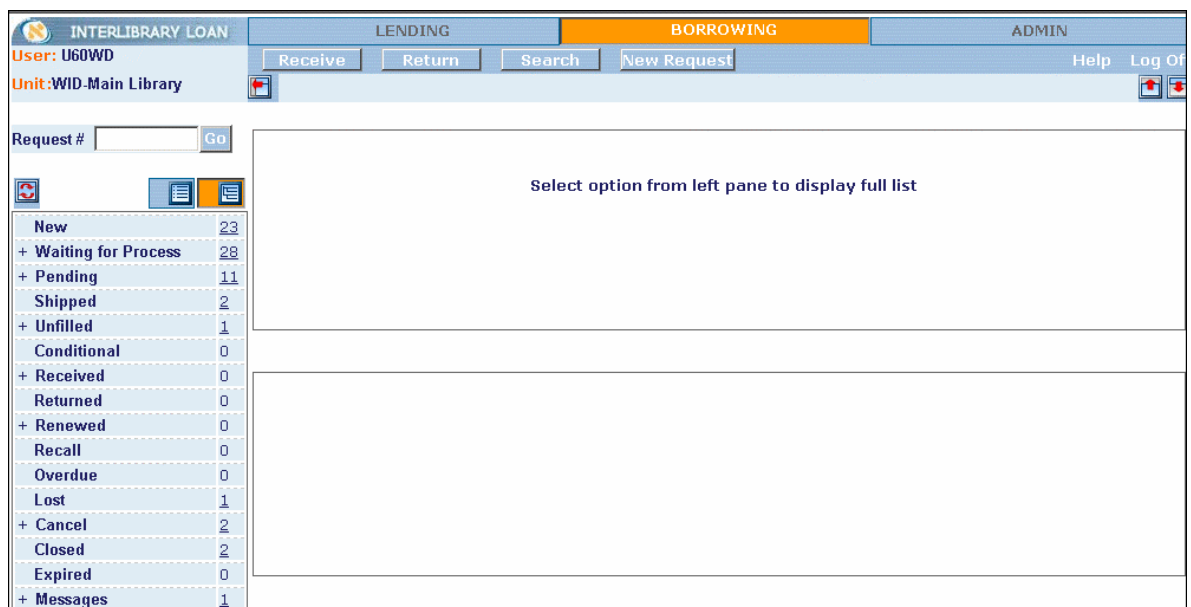
To access the ILL staff interface:

1. In the address bar of your Web browser, type in the following URL syntax:

`http://<your Web ILL server><your Web ILL port>/L`

<http://goldline.exlibris-usa.com:12001/L>

2. Log in as a registered ILL user (for example, U60WD). The following screen appears:



This screen is open at the Borrowing tab. This is the interface for carrying out borrowing-related activities.

5.1 Looking at the Borrowing Tab

The Borrowing tab of Web ILL lets you manage outgoing ILL requests initiated by a patron or an ILL staff user. It enables you to create new outgoing requests (using the **New Request** node), locate potential suppliers and send requests using automatic processes for ISO ILL message exchange. Functions for further processing of outgoing requests, such as **Receive**, **Return**, **Search** are also available under the Borrowing tab as separate nodes.




Let us look at the Borrowing tab in more detail.

Message bar



Located below the top bar, the **Message bar** displays online information, error and confirmation messages that inform the user of conditions that may require special consideration.



You can also change the display of the main window by using the arrow buttons on the Message bar. The main window of the Borrowing tab is divided into three panes, left, upper right and lower right.




- To hide the left pane and expand the right pane, click .
- To display the full view of the right lower pane, that is, the full record and its four tabs, click .
- To display the full view of the right upper pane, that is, the list of outgoing requests, click .

Status/Message Tree

The left pane presents the **Status/Message Tree** for outgoing ILL requests, which can be viewed as a **List** (by clicking ) or a **Tree** (by clicking 


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Request #

New	10
+ Waiting for Process	37
+ Pending	8
Shipped	2
+ Unfilled	0
Conditional	0
+ Received	1
Returned	0
+ Renewed	2
Recall	0
Overdue	0
Lost	0
+ Cancel	1
Closed	1
Expired	0
+ Messages	3

The number to the left of each status represent the number of existing requests for that status. Clicking the link under the number allows you to see the list of requests in the upper right pane.

To refresh the display of the **Status Tree**, click 



The left pane also includes the option to retrieve a request directly by entering the request number in the **Request #** field and pressing Enter or clicking .





List of Outgoing Requests

The upper right pane of the Borrowing tab contains the full list of outgoing requests for each selected status:

New

| | | |

Records 1 - 10 of 24 Records per Page [5](#)|[10](#)|[20](#) Jump to #  

#	Option	Rush	Title	Req. No.	Status	Last Activity
1	<input type="checkbox"/>	 	Syriac manuscripts at Houghton Library, ca. 600-ca. 1900 (inclusive).	2215	New	01/06/04
2	<input type="checkbox"/>	 	ARTFL Project, University of Chicago [computer file] : Project	2214	New	31/05/04

Various sorting and navigation options can be used for efficiently retrieving specific requests from the list.

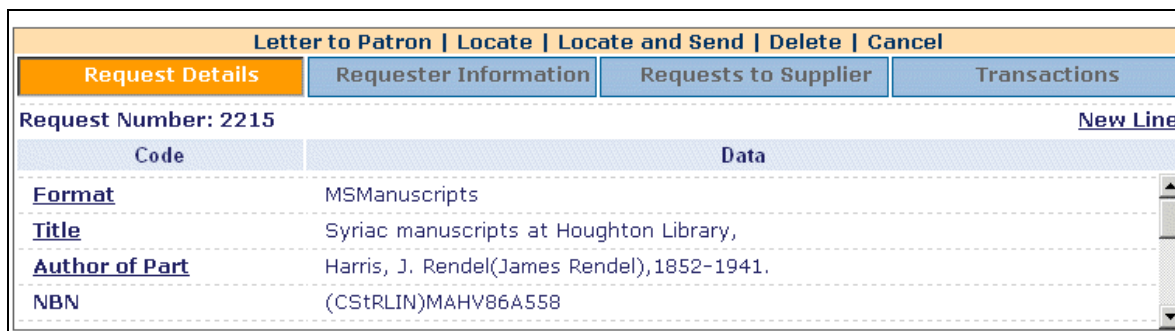
You can sort the list by **Title, Request Number, Status, Last Activity** and so on, in ascending/descending order; define the maximum number of records for display per page; or use the option **Jump to** to jump to designated records (according to the search parameter). The records in the upper pane list can be handled separately or as a group (by choosing several/all records) using the buttons on the Menu line of the upper pane. The handling options available for the upper pane list are: **Locate, Send, Delete, Select All, Deselect** for outgoing requests; and **Dismiss, Select All, Deselect** for messages.

Next to every record in the list there are Full View **F** and Locate Preview **V** buttons (depending on the request status). These enable you to select a record for full view display on the lower pane or to open the record for a preview of located potential suppliers.

Full View of Record

The lower pane of the Borrowing tab presents the full view of a record selected in the upper pane list (you can select a record for a full display by clicking the Full View button). Full view of a record is divided into four tabs: **Request Details, Requester Information, Requests to Supplier, and Transactions.**

In the **Request Details** tab you can see the bibliographic and other information related to the request:



Letter to Patron Locate Locate and Send Delete Cancel	
Request Details Requester Information Requests to Supplier Transactions	
Request Number: 2215 New Line	
Code	Data
Format	MSManuscripts
Title	Syriac manuscripts at Houghton Library, Harris, J. Rendel(James Rendel),1852-1941.
Author of Part	Harris, J. Rendel(James Rendel),1852-1941.
NBN	(CStRLIN)MAHV86A558

You can edit this information by clicking the link under the field names or add information to the request by clicking the **New Line** link.

The New Line link is also useful when you want to mark a request as a 'Mediated Request'. To do this, follow these steps:

1. Click New Line. The Editing form opens.
2. In the code field, select 'Mediated Request' and type in the data field: \$\$aM:

Edit ILL Bibliographic Record

Code:

Mediated Request

Data:

\$\$\$M

Submit Close

- Click . A mediated request will be sent out (when Send is submitted) flagged as a mediated request and will be handled separately by the supplier.

The **Requester Information** tab includes information about the requester, such as the requester ID, barcode, name, and address.

Letter to Patron Locate Locate and Send Delete Cancel	
Request Details	Requester Information
Request Number: 2215	
Code	Data
ID:	2215
Barcode:	ILL3
Name:	U60WDPAT1 ILL WID Patron
Address:	U60WDPAT1 ILL WID patron 1247 widpat rd

The **Requests to Supplier** tab displays the list of suppliers located for the request (providing that the **Locate** operation was successfully performed):

Locate Letter to Patron Send Delete Cancel				
Request Details	Requester Information	Requests to Supplier	Transactions	
Request Number: 2212		Rearrange List Add New Supplier		
Option	Supplier Code	Supplier Name	Av. Supply Days	Status
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	U60HL	HYL-East Asian Library	5	New
<input type="checkbox"/> <input type="checkbox"/>	U60LA	LAW-Law Library	3	Pending

You can edit the list by rearranging the order of the located suppliers (click **Rearrange List**) or by adding a new supplier to the list (click **Add New Supplier**). The suppliers that can be added are restricted by your definitions in the **Potential Suppliers List** for the specific request media.

Each request to a supplier has its own status. Only one request in the list can have an active status which point that this request is currently in process.

Active statuses can be: New, Sent to Supplier, Shipped, Loaned, Returned, Overdue, Recalled, Waiting Cancel Reply, Will-Supply, Conditional Reply, Hold Placed, Retry, Estimated, Location, Waiting Renewal Reply, Renewal-Accepted, Renewal-Rejected, Damaged, Lost, Closed and ENN.

Non-active statuses are: Pending, Unfilled, Cancelled, No-time to Supply.

The list also shows the Average Supply Days of each supplier (according to parameter set in the potential supplier record).

The editing options that allow you to add and rearrange the Supplier List are status-sensitive and are available only for requests that have the status New, Waiting for Process, Unfilled, Error, Locate Failed, or Cancelled. The **Requests to Suppliers** tab also enables you to perform various functions related to further handling of outgoing requests. These include **Information, Delete Supplier, Send, Message, Cancel, Status Query Message, Receive, Renew, Return, Lost and Damaged**. The availability of these functions for the specific request depends on the request status.

In the **Transaction** tab you can see all registered activity related to the specific request, including received and sent APDU messages.

Letter to Patron			
Request Details	Requester Information	Requests to Supplier	Transactions
Request Number: 2132			
Option	Date	Description	Dismiss/Activate Date
	01/04/04 11:44	ILL Request Number 2132 created	-----
	01/04/04 18:23	IllRequest message to U60LA	-----
D	18/04/04 15:35	Answer (Type will supply - In use on loan) message from U60LA Note:	-----

Another way of handling outgoing requests is by using the buttons on the Menu line of the lower pane.

Locate Letter to Patron Send Delete Cancel
--

These buttons are status-sensitive (available according to the request status) and partially duplicate the functions of the buttons on the upper pane and the Requests to Suppliers tab buttons on the lower pane, except for the **Letter to Patron** and **Print** options, which are available only from the Menu line of the lower pane.

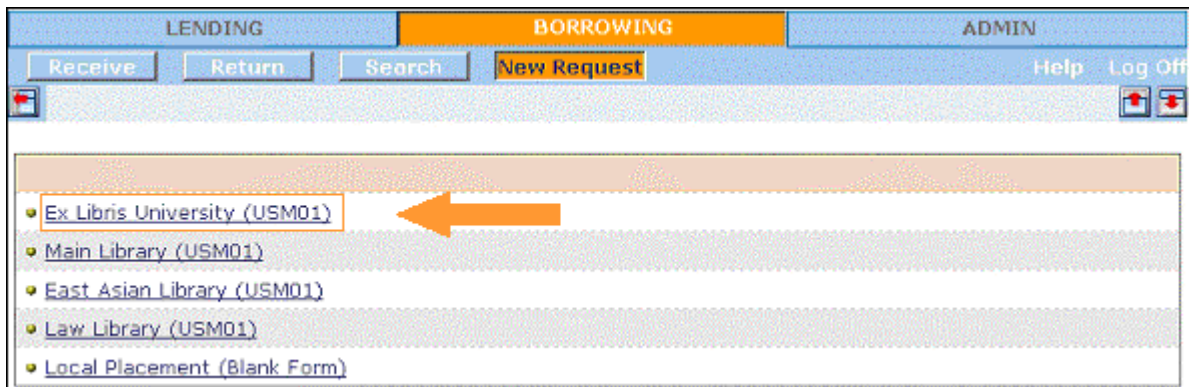
5.2 Submitting a New ILL Request

An ILL request can be initiated by the patron in the ALEPH Web OPAC or by the ILL staff on behalf of the patron.

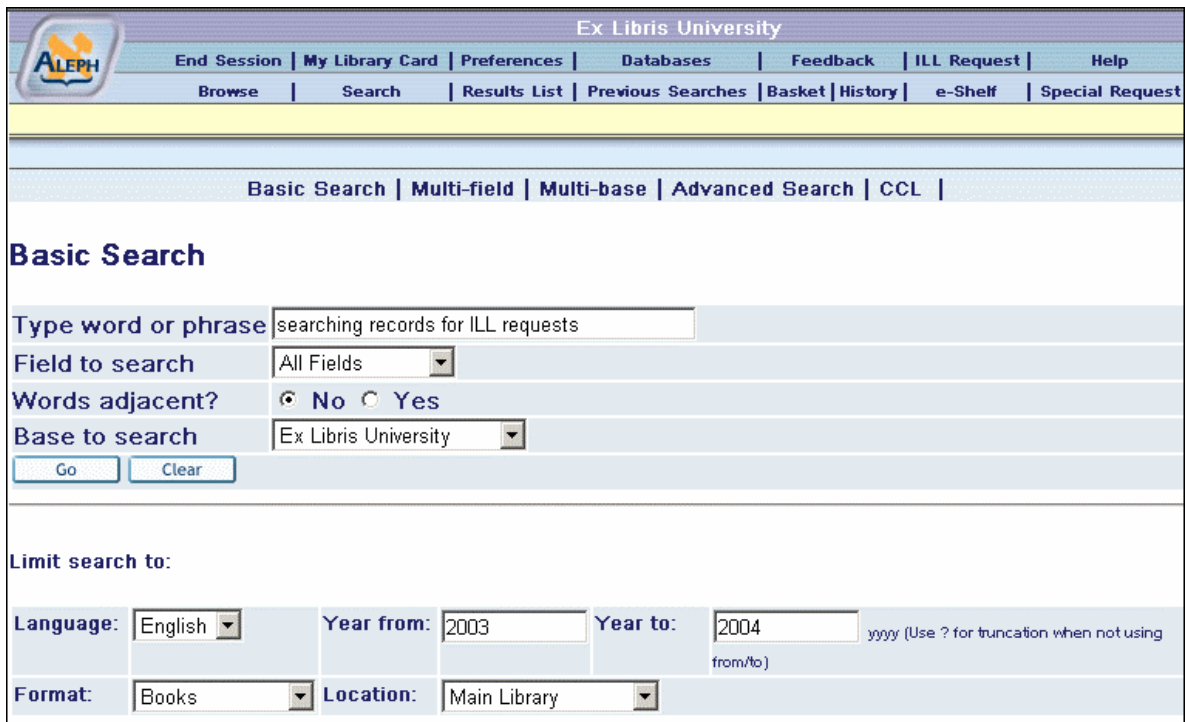
To initiate a request as a staff user (on behalf of a patron), follow these steps:

1. From the staff ILL interface, click **New Request** in the options bar at the top of the screen. A list of libraries displays.

2. Select a library base to search by clicking on it:



This opens the appropriate Web OPAC search screen:



You can now find a record on which to base the creation of a new Borrowing (Outgoing) request.

You can also place a request via the Web OPAC by searching remote ALEPH or Z39.50-compliant databases or by filling in a blank form.

To locate a record for an outgoing request:

1. Use the Browse or Search functions of the Web OPAC.
2. Display a record in full, and then click [ILL Request](#) from the options bar to order the item (do not choose the **ILL Request** option from the menu bar at the top of the screen):

Ex Libris University

End Session | My Library Card | Preferences | Databases | Feedback | ~~ILL Request~~ | Help

Browse | Search | Results List | Previous Searches | Basket | History | e-Shelf | Special Request

Add to e-Shelf | Add to Basket | Locate | Save/Mail | Save on Server | SFX | **ILL Request**

Full View of Record

Choose format: [Standard format](#) [Catalog card](#) [Citation](#) [Name tags](#) [MARC tags](#)

Record 38 out of 47 ◀ Previous Record Next Record ▶

Book Number	000028885
Record Format	Monograph
Main Entry	● Jacobus, ca. 1229-1298
Title	● Leaves from the Golden legend / chosen by H.D. Madge ; with illustrations by C.M. Watts.
Title	● Legenda aurea. English. Selections
Imprint	New York : E.P. Dutton, 1899.
Descr.	xvii, 286 p. : ill. ; 17 cm.
Language	eng lat
Subject - Lib. Cong.	● Christian saints -- Biography -- Early works to 1800. ● Christian saints -- Legends -- Early works to 1800. ● Legends, Christian.
Add. Entry	● Madge, H. D. ● Watts, C. M.

The ILL form with completed bibliographic information is displayed for you to fill in the details of your request:

INTERLIBRARY LOAN Help

Unit: WID-Main Library

ILL Request

Name: U60WD ILL WID Staff

Address: U60WD ILL WID Staff
245 wid rd.

Requester ID/barcode *

Rush Request Yes No

Requester Email

If you provide information about chapter, article or part, the loaning agency will be able to provide a photocopy.

Title Leaves from the Golden legend /

Author Jacobus,

3. After completing the form, click . The system responds with an ILL Request confirmation screen which contains the patron and bibliographic information of the requests and options to print or locate suppliers for the request:

ARCHIVES 15.5 - ILL Request Confirmation	
Patron Information	
Transaction ID:	000006543
ID:	U15ARPAT1
Name:	U15AR ILL Patron
Barcode:	ILL5
Address:	Dr. U15AR ILL Patron 65147 King David Blvd.
Phone:	34698-445-3514
Email:	yifatl@exlibris.co.il
ILL Request Information	
Format	SRSound recording
Title	The gold & silver gala
Main Author	Domingo, Plácido,1941-prfcnd
Author of Part	Alagna, Roberto.prf
Author of Part	Croft, Dwayne.prf
Author of Part	Gheorghiu, Angela.prf
Author of Part	Udovics, László,1964.prf
<input type="button" value="OK"/> <input type="button" value="Print"/> <input type="button" value="Locate"/>	

- Click to place the request. The main ILL window appears with the newly-created outgoing request displayed.

Another way to create a new outgoing request is to fill in the blank form. To do this, follow these steps:

- Click the Local Placement (Blank Form) link.

The screenshot shows a web interface with three main tabs: LENDING, BORROWING (highlighted in orange), and ADMIN. Under the BORROWING tab, there are buttons for 'Receive', 'Return', 'Search', and 'New Request'. The 'New Request' button is highlighted. Below the navigation bar is a list of library locations, each with a radio button and a link: 'Ex Libris University (USM01)', 'Main Library (USM01)', 'East Asian Library (USM01)', 'Law Library (USM01)', and 'Local Placement (Blank Form)'. An orange arrow points to the 'Local Placement (Blank Form)' option.

- The ILL Request form displays:

INTERLIBRARY LOAN
Unit: WID ILL Library

ILL Book Request

Book	Journal
Name: U60WD ILL WID Staff	
Address: U60WD ILL WID Staff 245 wid rd.	
Requester ID/barcode * 0245	
Rush Request <input type="radio"/> Yes <input checked="" type="radio"/> No	
Fill in as much information as possible. (* Mandatory Fields)	
Author	Smith, Rachel (Last name, first name)
Title	* East Asia Economic Issues
Edition	
Place of publication	NY
Publisher	
Year of publication	2001
ISBN	
Series	

- Choose the appropriate format (Book/Journal) in the displayed ILL form, fill in the details of your outgoing request and submit the form.

A patron (which is not an ILL staff user) who is registered to use the Web OPAC can also submit an ILL request based on an existing document or submit a blank ILL request form using the upper bar ILL Request button. The ILL ALEPH Web OPAC request form is different from the form that is used by an ILL staff user and the option to Locate request (after submitting the request) is not available.

5.3 Creating A List of Suppliers For An Outgoing Request

To create a list of suppliers for an outgoing request, either

From the list, click **Locate**. You can select more than one record:

Locate Send Delete Select All Deselect						
#	Option	Rush	Title	Reg. No.	Status	Last Activity
Records 1 - 10 of 69 Records per Page 5 10 20 Jump to # <input type="text"/> <input type="button" value="Go"/>						
7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The gold & silver gala [sound recording].	559	Waiting for Process	07/01/04
8	<input type="checkbox"/>	<input type="checkbox"/>	Stratford-Upon-Avon inventories, 1538-1699. Vol 2, 1626-1699 / edited by James Jones	558	Waiting for Process	07/01/04

Or, from the Full Record, click **Locate** to find potential suppliers for that record:

Request Details		Requester Information	Requests to Supplier	Transactions
Request Number: 2207				New Line
Code	Data			
<u>Format</u>	MNMonograph			
<u>Title</u>	The history of greece.			
<u>Pickup Location</u>	WID			
<u>Update Date</u>	01/07/04			

The list of potential suppliers is built according to the Potential Suppliers List defined by your ILL Unit. It is managed under the Web ILL Admin tab and arranged by outgoing request media, level, and sequence within the level.

- **Supplier List**

When building the supplier list for an outgoing request, only potential suppliers that are defined for a media type that matches the media type of the request are taken into consideration (that is, if the request media type is L-Printed, only potential suppliers that are defined for the L-Printed media type will be included in the list). If a "last resort" supplier is defined in the Potential Suppliers List of your ILL Unit, it will always be listed in the last position in the outgoing request's list of suppliers.

- **Locate Query**

The Locate Query for an outgoing request is built using parameters and locate strings defined in the library's configuration table.

- **Outgoing Locate Types**

The outcome of Outgoing Locate varies according to the Locate Type defined in each ILL Supplier record, and the method that was used for the Locate function. If the Locate Type for a supplier is set as ALEPH ILS Handling or Unit Management, the Locate will be performed at the level of available items using x-service. For a supplier of the type External the Locate will be handled at the level of matching bibliographic records using the regular Z39.50 search. There is no check at this point for any existing/available items.




- **Request Status**

The status of an outgoing request for which the Locate action has succeeded changes to Waiting for Process. In the case of a Locate failure - the Locate was performed and no potential suppliers were found, the status of the request changes to Locate Failed.

- **Local Ownership**

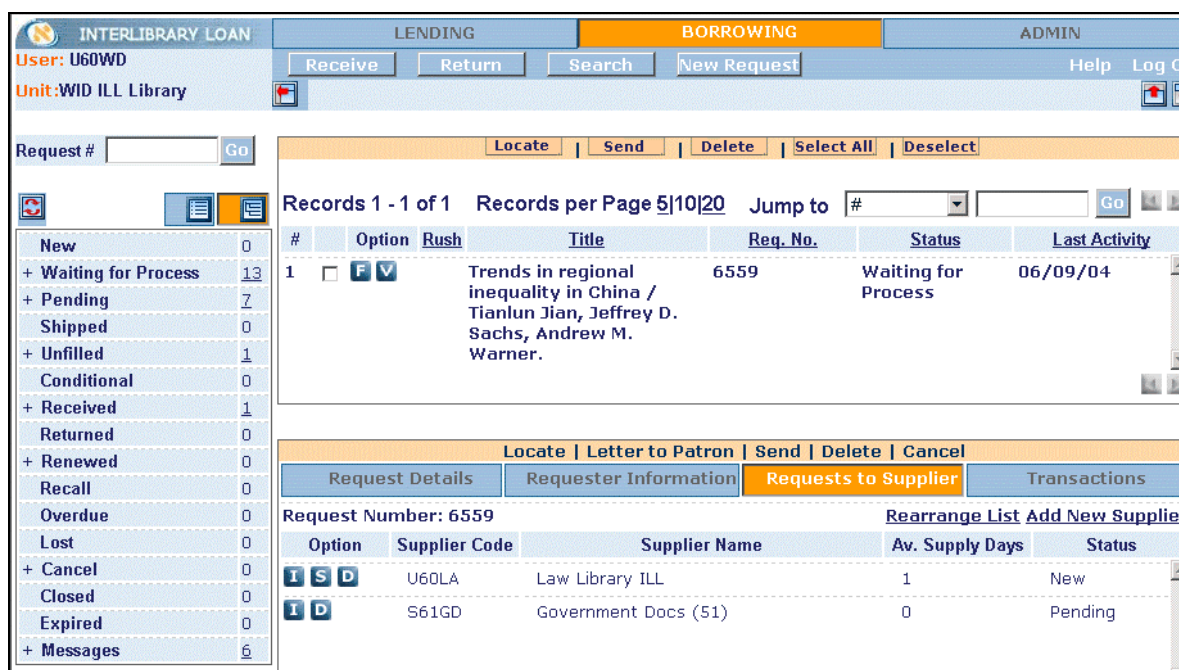
If the parameter Check Local Ownership for your ILL Unit is set to Yes, the check for available items is performed in the ILL Unit's own database. If successful, no outgoing Locate is performed, a relevant message to staff users is triggered and the request status changes to Locally Owned. Note that the self ownership check is performed only for the first **Locate** attempt. When additional locate attempts are carried out for a request which has already been designated as **Locally Owned**, the self ownership check is not performed again and the locate of a potential supplier is not blocked.

- **Locate Preview**

The Locate Preview  button allows you to preview results of a Locate before it is actually performed. The results can be viewed using the Locate Preview window. To see the list of suppliers that would be retrieved if the Locate is actually performed, click the  button next to the outgoing requests. The possible Locate results will be displayed. To proceed to Locate from the Locate Preview window, click . If you choose to close the window, the Locate will not be performed and the status of the request will not change.

- **Located Record**

Request that its Locate potential supplier procedure ended successfully or supplier manually added to its list (using Add New Supplier option) is considered as located and its status changed to Waiting for Process.






The screenshot shows the 'INTERLIBRARY LOAN' interface with tabs for LENDING, BORROWING, and ADMIN. The user is 'U60WD' and the unit is 'WID ILL Library'. The main pane displays a list of requests with columns for #, Option, Rush, Title, Req. No., Status, and Last Activity. A single record is shown with status 'Waiting for Process'. Below this, there are tabs for 'Request Details', 'Requester Information', 'Requests to Supplier', and 'Transactions'. The 'Requests to Supplier' tab is active, showing a table of potential suppliers for request 6559.

Option	Supplier Code	Supplier Name	Av. Supply Days	Status
	U60LA	Law Library ILL	1	New
	S61GD	Government Docs (51)	0	Pending

5.4 Sending Requests To A Supplier

You can use one of the following options to send a request to a supplier:

- From the full record (lower pane) – Requests to Supplier tab, click .  is available only for requests with the status of New to suppliers.
- Select requests and click  from the options menu of the upper pane. This action is status-sensitive and can be performed only for requests with the status **New** or **Waiting for Process**. The send action results in one of two possibilities:
 - If the **Locate** action for the selected record has already been performed and potential suppliers' lists have been created (that is, the status is Waiting for Process), the outgoing request for this record is sent to the first active request to supplier.

- For New requests, the **Locate** action is performed first and only afterwards are the outgoing requests sent (providing that **Locate** has been successful and potential suppliers have been found).

As a result of the Send action, an **Ill Request** message to the lender is sent and the status of the outgoing request becomes Sent to Supplier.

Send has succeeded (0316)

Waiting for Process

Locate | Send | Delete | Select All | Deselect

Records 1 - 10 of 28 Records per Page 5|10|20 Jump to # Go

#	Option	Rush	Title	Req. No.	Status	Last Activity
1	<input type="checkbox"/>	F	Masks hidden in the dark.	2212	Sent to Supplier	01/06/04
2	<input type="checkbox"/>	F V	The history of greece.	2211	Waiting for Process	28/04/04
3	<input type="checkbox"/>	F V	The history of greece.	2210	Waiting for	28/04/04

Letter to Patron | Print | Cancel

Request Details Requester Information **Requests to Supplier** Transactions

Request Number: 2212

Option	Supplier Code	Supplier Name	Av. Supply Days	Status
I C M Sq	U60HL	HYL-East Asian Library	5	Sent to Supplier
I D	U60LA	LAW-Law Library	3	Pending

5.5 Deleting Outgoing Requests

To delete an outgoing request(s) from the list, choose one or more records and click **Delete**. This action is status-sensitive and is performed only for those requests which have the following statuses: **New, Unfilled, Closed, Cancelled, Error**.

The screenshot shows the 'INTERLIBRARY LOAN' system interface. At the top, there are tabs for 'LENDING', 'BORROWING' (selected), and 'ADMIN'. The user is identified as 'User: U60WD' and the unit as 'Unit: WID ILL Library'. A notification states 'Delete has succeeded'. The main area is titled 'Unfilled' and contains a table of records. Below the table, there are tabs for 'Request Details', 'Requester Information', 'Requests to Supplier', and 'Transactions'. The 'Request Details' tab is active, showing information for 'Request Number: 6440'.

#	Option	Rush	Title	Req. No.	Status	Last Activity
1	<input checked="" type="checkbox"/>	F	Punctuation - what do we need them for.	6440	Deleted	06/09/04

Code	Data
Format	MNMonograph
Title	Punctuation - what do we need them for.
Imprint	[NY] :Hamilton{[lcc1995

5.6 Selecting All/Deselecting

To choose all records in the list for further handling, click **Select All**. To remove all selected records in the list, click **Deselect**.

5.7 Receiving an Arrived Item

To register an arrival of the supplied material from a lender, you can use one of the following two options:

- From the full record (lower pane) – Requests to Supplier tab, click **Rc** (Receive).
- From the options menu of the Borrowing tab, click **Receive**.

5.7.1 Receive via the Requests to Suppliers Tab

The screenshot shows the 'Letter to Patron' interface with the 'Requests to Supplier' tab selected. It displays 'Request Number: 2170' and a table with columns for 'Option', 'Supplier Code', 'Supplier Name', 'Av. Supply Days', and 'Status'.

Option	Supplier Code	Supplier Name	Av. Supply Days	Status
I M Rc Sq	U60LA	LAW-Law Library	3	SHP

When you click **Rc**, an appropriate form is opened for you: either for Loaned material or for Copied material according to the information sent by the supplier in the preceding Shipped message.

For Copied Material

After you click **Rc**, the following form is displayed:


Send APDU Received Message		Help
Supplier Code:	U50HS	
Supplier Name:	U50HS ILL unit-UHLTH USCI	
For Copied Material:		
Media Arrived:	Printed (Photocopy) ▾	
Date Received:	20040704 (yyyymmdd)	
Number of Pages:	<input type="text"/>	
Page Size:	<input type="radio"/> Legal(8.5x14) <input checked="" type="radio"/> Letter(8.5x11) <input type="radio"/> Ledger(11x17)	
Item Barcode:	<input type="text"/>	
Item Status:	<input type="text"/>	
Supplier Currency:	US Dollar ▾	
Supplier Cost:	<input type="text"/> (xxx.xx)	
Supplier Local Cost:	<input type="text"/> (xxx.xx)	
Patron Cost - Local:	<input type="text"/> (xxx.xx)	
Circulation Note:	<input type="text"/>	
Note:	<input type="text"/>	
Patron Agreement:		
Copyright Signed:		
<input type="button" value="Submit"/> <input type="button" value="Close"/>		

The fields contained in this form are explained below:

- Media Arrived**
 Choose the media format type for the arrived item.
- Date Received**
 The Date Received field reflects the date the item arrived from the supplier. By default this will be the current date.
- Page Size**
 Optional. Choose the page size of the photocopy. (Used for billing purposes).
- Number of Pages**
 Optional. Enter the number of arrived photocopied pages. (Used for billing purposes).
- Item Barcode**
 Optional for copy arrival. If you wish to create an item record for the arrived copied material, enter item barcode. This is required if you are working with an

ALEPH circulation system and you want to register loan of the material to your patron. This field is usually not used for arrived copied material.

- **Item Status**
If you selected the option to create an item record for the arrived copied material, choose an item status that will be assigned to this ILL material. This field is usually not used for arrived copied material.
- **Supplier Currency**
Optional. The Supplier Currency field reflects the currency in which the supplier charges the library for providing the material.
- **Supplier Cost**
Optional. The Supplier Cost field reflects the amount charged by the supplier for providing the material.
- **Supplier Local Cost**
Optional. The Supplier Cost - Local field reflects the local cost charged by the supplier for the material (after exchange rates have been applied to the cost).
- **Patron Cost - Local**
Optional. The Patron Cost - Local reflects the amount the patron will be charged (in local currency) for this request.
- **Circulation Note**
The Circulation Note field is optional. It is used when an item is created for the arrived copy. If required, a circulation note (which records that a map or a chart, for example, is included with the item) may be attached to the material. When the item is checked out or checked in (issued or discharged) through the Circulation GUI, this note will be displayed. This field is usually not used for arrived copied material.
- **Note**
Any text entered in this field will be included in the Received message that is automatically sent to the supplier.
- **Patron Agreement**
The Patron Agreement field indicates whether the patron is required to sign a copyright declaration form.
- **Copyright Signed**
The Copyright Signed field indicates whether the patron signed a copyright declaration form.


When you have finished filling out the form, click  to register an arrival. The following occurs:

1. The status of the request is changed to Closed.
2. A Received message is automatically sent to the supplier.

For Loaned Material


- **Media Arrived**
Choose the media format type for the arrived item.
- **Date Received**
The Date Received field reflects the date the item arrived from the supplier. By default this will be the current date.
- **Exp. Return Date**
This is the date by which the supplier requires that the material be returned. This field is automatically filled based on information supplied by the Shipped message received from the supplier. The due date for this item (the date by which the patron must return the material to the library) is calculated based on the Expected Return Date.
- **Item Barcode**
Enter the record's barcode to be used during circulation. If the field is left empty, the barcode will be automatically generated for you based on the system and sequence number of the request (for example, 3697-10).
- **Item Status**
Choose an item status that will be assigned to this ILL material. The item status determines the loan procedure for the arrived item (depending on the relevant ALEPH table setup): whether the loan is performed upon submitting this form, or whether it is performed later on, when the patron arrives to pick up his ILL material.
- **Supplier Currency**
Optional. The Supplier Currency field reflects the currency in which the supplier charges the library for providing the material.
- **Supplier Cost**
Optional. The Supplier Cost field reflects the amount charged by the supplier for providing the material.
- **Supplier Local Cost**
Optional. The Supplier Cost - Local field reflects the local cost charged by the supplier for the material (after exchange rates have been applied to the cost).
- **Patron Cost - Local**
Optional. The Patron Cost - Local reflects the amount the patron will be charged (in local currency) for this request.

- **Circulation Note**
The Circulation Note field is optional. If required, a circulation note (which records that a map or a chart, for example, is included with the item) may be attached to the material. When the item is checked out or checked in (issued or discharged) through the Circulation Client, this note will be displayed.
- **Note**
Any text entered in this field will be included in the Received message which is automatically sent to the supplier.
- **Patron Agreement**
The Patron Agreement field indicates whether the patron is required to sign a copyright declaration form.
- **Copyright Signed**
The Copyright Signed field indicates whether the patron signed a copyright declaration form.

When you have finished filling out the form, click  to register an arrival. The following occurs:

1. The status of the request is changed to Loaned.
2. A Received message is automatically sent to the supplier.
3. If your ILL Unit is working in an ALEPH environment and depending on the relevant table setup, the material that has arrived can be either:
 - Automatically loaned to the patron or to the pickup sublibrary or to the ILL Unit, or
 - Not loaned until the patron applies to the circulation desk and performs a loan.

5.7.2 Receiving From The Upper Borrowing Tab

To register the arrival of the requested material from a supplier, you can also click  from the options bar in the upper pane. This lets you display two forms: one for copied material and another for loaned material). Choose the relevant form according to the media of the arrived item.

To register received material via the Borrowing tab, you must specify the request number. Fill in the request number for which the action is performed in the Request Number field. Details as for other fields and actions of this form can be found in the [Receive from the Requests to Suppliers tab](#) section.

5.8 Returning An Item To A Lender

To register the return of the supplied loaned material to the lender, you can use one of the following two options:

- From the full record (lower pane) – Requests to Supplier tab, click **Rt** (Return).
- From the options menu of the Borrowing tab, click **Return**.

5.8.1 Return via the Requests to Supplier Tab

When you click **Rt**, a form with a Note field is opened:


You can type in text to be included in the Returned message that is automatically sent to the supplier upon submission of the form.

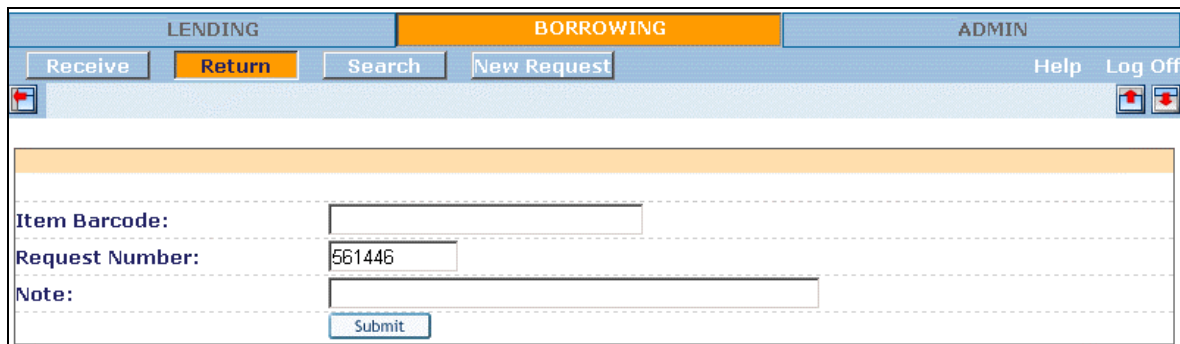
Click **Submit** to register a return. The following happens:

- The status of the request is changed to Returned.
- A Returned message to the supplier is automatically sent.

- If your ILL Unit is working in an ALEPH environment, the loaned material being returned is checked in/discharged (returned in circulation) and deleted from the data.


5.8.2 Return from Upper Borrowing Tab

To return loaned material to the lender, you can also click  from the options menu of the Borrowing tab. This opens the following form:



You can either enter the barcode that was assigned when the material was received or (optionally) the request number of the returned item.

- **Item Barcode**
Enter the barcode of the item being returned or the Request Number.
- **Request Number**
Enter the Request Number for which the material is being returned.
- **Note**
Any text entered in this field will be attached to the **Returned** message that is automatically sent to the lender.

Click  to register a return. The following happens:

- The status of the request is changed to Returned.
- A Returned message to the supplier is automatically sent.
- If your ILL Unit is working in an ALEPH environment, the loaned material being returned is checked in/discharged (returned in circulation) and deleted from the data.

5.9 Retrying A Request

When the supplier answers your request as follows: Retry at a later date, you can resend the request to the supplier. This activates the Retry function.

To resend a request to a supplier, click **Add New Supplier** from the Request to Supplier tab in the full record (lower pane). This allows you to re-register the same supplier to the suppliers list.

Note

The system only lets you add the same supplier to the list if the request to supplier status is Retry (in any other case, you will be blocked when trying to add a supplier which is already in the list).

After adding the supplier again to the list, you will have a New request at the top of the list with the status New. To send the request again;

- From the full record (lower pane) – Requests to Supplier tab, click **S** (Send).
- From the upper pane, click **Send**.

5.10 Renewing A Request

If a request has already been received from the supplier for loan (status Loaned), you can ask the supplier to renew the loan period.

To renew a request to supplier:

- From the full record (lower pane) – Requests to Supplier tab, click **Rn** (Renew).

This action sends a request for renewal to the supplier and changes the request's status to: Waiting Renewal Reply. As soon as the renewal reply is received from the supplier, the request status changes according to the renew answer: Renew Rejected or Renew Accepted.

If your ILL Unit is working in an ALEPH environment, a Renew Accepted answer from the supplier updates the loan due-date in the ALEPH Circulation system.

The patron is also allowed to submit a request for renew from the ALEPH Web OPAC - Library Card: Loans. If the patron is permitted to submit a request for renew (depending on the privileges defined in the ALEPH setup) a Renew option is available and it triggers a Renew message to the supplier (same as explained above).

5.11 Deleting A Request To A Supplier

This applies to requests that have not yet been sent to a supplier. To delete a located supplier from the Requests to Supplier list:

- From the full record (lower pane) – Requests to Supplier tab, click **D** (Delete Supplier).

5.12 Notifying The Supplier About Damaged and Lost Items

This applies to requests that have already been received from the lender for a loan. To notify the supplier that the supplied item is lost or damaged:

- From the full record (lower pane) – Requests to Supplier tab, either click **D** (Damaged) or **L** (Lost).

Note

The same **D** button is used for both Delete Supplier and Damaged. To avoid confusion, check the ToolTip to verify the purpose of the button.

5.13 Answering a Recall Request from a Lender

To send an answer to the recall request of the lender.

- From the full record (lower pane), click **Recall Answer**.

The following screen appears:

Select Yes (if you approve the recall request) or No (if you want to reject it).

If you select Yes, type in the recall date. Upon submitting the form, a general message is sent to the lender informing them of your answer. The loaned due-date is updated according to the recall date entered.

5.14 Answering A Conditional Reply

When the supplier answers your request with a conditional request, the request status becomes Conditional Reply.

To answer a Conditional Reply:

- From the full record (lower pane) – Requests to Supplier tab, click **Cr**.

The following screen appears:

The Conditional Reply form enable you to accept or reject the supplier's conditional reply.

5.15 Changing Statuses

The Change Status action allows you to change the request status. The statuses from which this action can be performed and the statuses to which the change can be done are set in a configuration table.

To change a request status:

- From the full record (lower pane) – Requests to Supplier tab, click **Change Status**. This invokes the Change Status APDU Form.

5.16 Sending a Status Query to a Supplier

To send a query to the supplier as to the status of your request in his system:

- From the full record (lower pane) – Requests to Supplier tab, click **Sq**.

The Status Query Report reply is automatically triggered by the peer system and sent back to you with the status of your request.

5.17 Changing Status to Expired

This applies to requests with a status of Sent to Supplier but without a response having been received within the number of days defined in the request's Expiry Days parameter.

To change the status of a request to Expired:

- From the full record (lower pane) – Requests to Supplier tab, click **E** (Expired).

Submitting the Expire message to the supplier changes the request to supplier status to Expired. There is also a batch service that handles all expired requests: Borrowing Library - Expired Messages (ill-15).

5.18 Canceling Requests

This applies to requests with a status of Sent to Supplier. To send a cancellation message to a supplier:

- From the full record (lower pane) – Requests to Supplier tab, click **C** (Cancel).

The status of the request becomes Waiting Cancel Reply. As soon as a Cancel Reply-Accepted message is received from the supplier, it changes to Cancelled. If a Cancel Reply-Rejected reply is received, the status of the request turns back to Sent to Supplier.

5.19 Viewing Information

To view information regarding the request to a supplier such as: send date, expected arrival date, arrival date, due date. Average supply date, and so on:

- From the full record (lower pane) – Requests to Supplier tab, click **I** (Info).

5.20 Sending Messages

This applies to requests already sent to supplier (with a status of Sent to Supplier and onward). To send a free-text message to the supplier:

- From the full record (lower pane) – Requests to Supplier tab, click **M** (Message).

5.21 Sending Letters to Patrons

You can send a letter/e-mail to a patron for various reasons: More information needed, Cancellation of a request, Requirement for copyright signature, and so on. Your system librarian can add additional types of letters. Note that when letters/e-mails are sent to a patron, the request status does not change.

To send a letter/e-mail to a patron:

- From the full record (lower pane), click **Letter to Patron**.

The following form appears:

5.22 Printing

This applies to requests with a status of Sent to Supplier.

To print an information slip for an outgoing request:

- From the full record (lower pane), click **Print**.

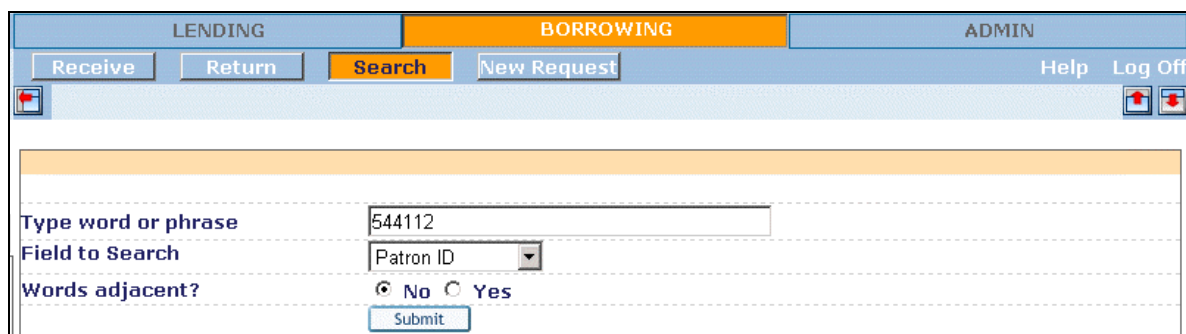
5.23 Searching For Outgoing Requests In The Borrowing Tab

The Search function lets you search / retrieve outgoing (borrowing) requests. The Search can be performed using Word Indexes such as Title Words, Subject and so on or using Direct Indexes identifiers such as System Number, Barcode, Patron ID, and so on.

Additional search indexes can be defined. The search indexes supplied in the standard setup are: Title Words, Actual Title, Author, Subject, ISSN, ISBN, System Number, Barcode, Patron ID, All Fields.

To start a search:

1. From the options bar of the upper pane in the Borrowing tab, click **Search**. The following search pane appears:



The screenshot shows a web interface with three main tabs: LENDING, BORROWING (highlighted in orange), and ADMIN. Below these tabs is a navigation bar with buttons for 'Receive', 'Return', 'Search', and 'New Request'. The 'Search' button is highlighted. Below the navigation bar is a search form with the following fields:

- 'Type word or phrase': A text input field containing '544112'.
- 'Field to Search': A dropdown menu currently set to 'Patron ID'.
- 'Words adjacent?': Radio buttons for 'No' (selected) and 'Yes'.
- 'Submit': A button to execute the search.

2. Choose the index to be searched and type in the relevant keywords.
3. Click **Submit**. This sends your search query to the system.

Search Hints:

- Lowercase letters will also find matches of capitalized words.
- Boolean operators AND, OR, and NOT can be used in search string. AND between words is implied.
- If you choose Yes for "Words adjacent", the system recognizes that only records that contain query terms one next to another will be selected.
- Truncation can be used when searching. Type a portion of a word and add the ? character or the * character at the beginning (or end) to indicate that you want all words that begin (or end) with that portion of the word. The ? character can also be


used to find variant spellings. For example, *alumi?m* finds both the American spelling, *aluminum*, and the British spelling, *aluminium*.

- **Type word or phrase**
Enter the search word or phrase.
- **Field to Search**
Select the index in which you want to perform the search.
- **Words adjacent?**
Select Yes if you want to limit the search to adjacent words.

5.24 Using the Status/Message Tree In The Borrowing Tab

The **Status/Message Tree** for Borrowing requests is comprised of two modes: List and Tree. The **List** mode displays statuses that are currently present or are being processed. The **Tree** mode presents the status groups that can be expanded to display the statuses of the List mode, and available message types. The numbers associated with each status represents the number of existing requests for that status. Clicking the link under the number displays the list of requests for the selected status in the upper right pane (the link is present only when the number is not zero).

To retrieve a specific request, enter the request number in the **Request #** field and press Enter or .

To refresh the display of the **Status Tree**, click . The grouping of the Status Tree is configured in the ILL Unit's configuration tables.

- **Status/Message Tree for Borrowing Tab (Outgoing Requests)**

The following is the default setup for the groups of statuses/messages that are available for the requests being processed in the Borrowing tab and the specific statuses/messages into which those groups can be expanded:

- **New**
- **Waiting for Process**
 - Waiting for Process
 - Locate Failed
 - Error
 - Locally Owned
- **Pending**
 - Will be Supplied
 - Sent to Supplier

- Hold Placed
- **Shipped**
- **Unfilled**
 - Unfilled
 - Retry
 - Estimate Reply
 - Locations
- **Conditional**
- **Received**
 - Loaned
 - Damaged
- **Returned**
- **Renewed**
 - Renew Rejected
 - Renew Accepted
 - Waiting Renew Reply
- **Recall**
- **Overdue**
- **Lost**
- **Cancel**
 - Waiting Cancel Reply
 - Cancelled
- **Closed**
- **Expired**
- **Messages**
 - Cancel Reply
 - General Message
 - Answer (Conditional)
 - Recall

- Overdue
- Renew Answer
- Answer (Retry)
- Answer (Unfilled)
- Answer (Hold-Placed)
- Answer (Estimated)
- Status or Error Report

6 Managing Incoming (Lending) ILL Requests

You can carry out the following ILL lending workflows via the ILL staff interface:

Lending (incoming)

1. Receiving a new request
2. Locating/Printing the Local record
3. Answering the requester (optional)
4. Shipping (borrower works on request)
5. Checking in returned material (in the case of a 'loaned' item)

In addition to the above basic ILL activities, you can also carry out additional transactions such as:

- Lending library accept/reject request for renewal
- Lending library recall the loaned item
- Sending free-text message

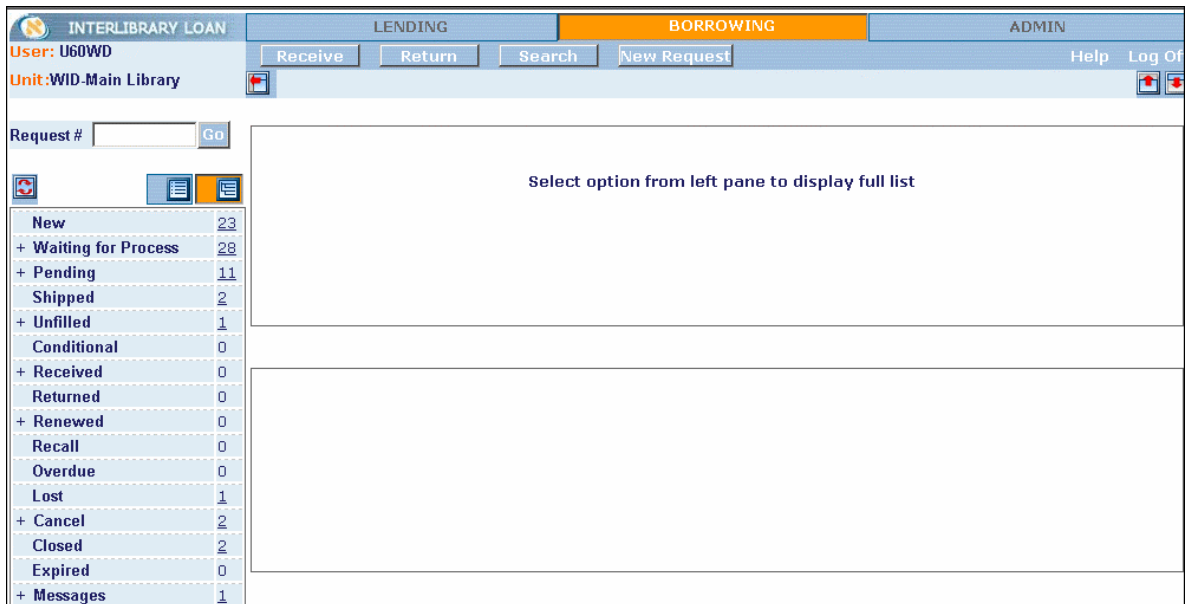
To access the ILL staff interface:

1. In the address bar of your Web browser, type in the following URL syntax:

`http://<your Web ILL server><your Web ILL port>/L`

<http://goldline.exlibris-usa.com:12001/L>

2. Log in as a registered ILL user (for example, U60WD). The following screen appears:



This screen is open at the Lending tab. This is the interface for carrying out borrowing-related activities.

6.1 Looking at the Lending Tab

The Lending tab of Web ILL is intended for the management of incoming ILL requests initiated by an outside institution and received by your ILL Unit. It enables you to register the incoming requests, locate items to be supplied, and to ship and receive them back using automatic processes for ISO ILL message exchange. Functions for further processing of incoming requests, such as **Check-In**, **Ship**, **Search** are also available under the Lending tab as separate nodes.

The screenshot displays the 'LENDING' tab of the Web ILL system. At the top, there are navigation tabs for 'LENDING', 'BORROWING', and 'ADMIN'. Below these are buttons for 'Check-In', 'Ship', 'Search', and 'New Request'. The user is identified as 'U60HL' and the unit as 'HYL-East Asian Library'. A 'Review' section contains a table of records with columns for '#', 'Option', 'Title', 'Req. No.', 'Status', and 'Last Activity'. The table shows two records: one for 'the history of greece' (Req. No. 2183, Status New) and another for 'Rockwood and Green's fractures in adults /' (Req. No. 2140, Status Mediated). Below the table, there is a 'Request Details' section for Ref. #: EXL:V16:WID:2178-1 (Req. #: 2183), showing fields for Format, Title, and Retry.



Let us look at the Lending tab in more detail.


Message bar

In the upper pane is the **Message bar**, which displays online information, error and confirmation messages that inform the user of conditions that may require special consideration:



You can also change the display of the main window by using the arrow buttons on the Message bar. The main window of the Lending tab is divided into three panes, left, upper right and lower right.

- To hide the left pane and expand the right pane, click .
- To display the full view of the right lower pane, that is, the full record and its four tabs, click .

- To display the full view of the right upper pane, that is, the list of outgoing requests, click .



Left Pane of Lending Tab

The left pane presents the Status/Message Tree for incoming ILL requests, which can be viewed as a List or a Tree:



Status	Count
+ Review	50
+ In Process	0
- Shipped	7
Sent on Loan	2
Sent as Copy	3
Requester Received	2
Return	1
+ Conditional	1
Cancel	0
Overdue	1
Recall	1
Lost	0
Damage	0
+ Not Supplied	0
Closed	1
+ Messages	12
Request for Renewal	3

The numbers that display for each status represent the number of existing requests for that status. Clicking the link under the number allows you to see the full list of requests in the upper right pane (if the number is greater than zero).



To refresh the display of the Status Tree, click . The left pane also includes the option to retrieve a request directly by entering the request number in the Request # field and pressing Enter or clicking .

Upper Pane of Lending Tab


The upper pane of the Lending tab contains the full list of requests for each selected status.

Various sorting and navigation options can be used for efficiently retrieving specific requests from the list.

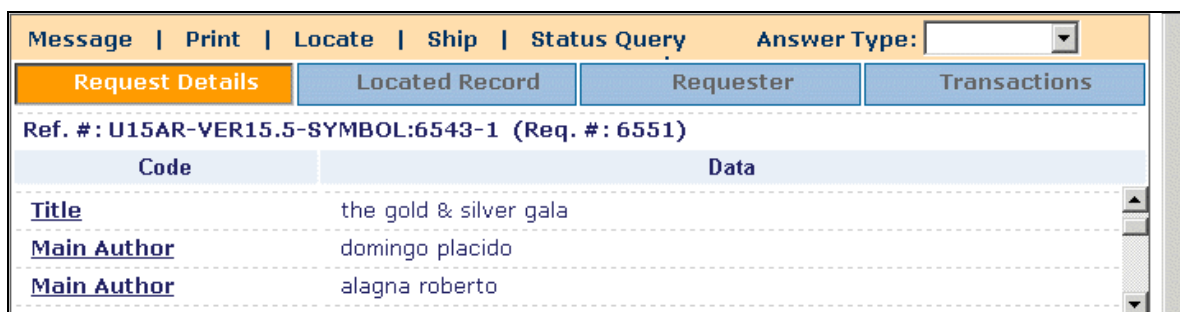
You can sort the list by **Title, Request Number, Status, Last Activity** and so on, in ascending/descending order; define the maximum number of records for display per page; or use the option **Jump to** to jump to designated records (according to the search parameter). The records in the upper pane list can be handled separately or as a group (by choosing several/all records) using the buttons on the Menu line of the upper pane. The handling options available for the upper pane list are: **Print, Locate, Select All, Deselect, Receive** for incoming requests; and **Dismiss, Select All, Deselect** for incoming messages.

Next to each record in the list there are Full View  and Locate Preview  buttons (depending on the request status), which enable you to select a record for full view display on the lower pane or to open the record for a preview of located available items.

Lower Pane of Lending Tab

The lower pane of the Lending tab presents the full view of a record selected in the upper pane list (you can select a record for a full display by clicking the Full View  button). The record displayed in the lower pane is always identified by a unique reference; for example, Transaction Group Qualifier, which consists of a system ID (the institution symbol of the borrower), a request number and sequence (as registered by the borrower), and a request number assigned by the system when a request is received, for example: Ref. #: EXL:V16:UARCV:2011-1 (Req. #: 2013).

The full view of a record is divided into four tabs: **Request Details, Located Record, Requester,** and **Transactions.**



In the **Request Details** tab you can see the Bibliographic and other information related to the request, such as Open Date, Need Before Date and so on. You can edit this information by clicking the link under the name of the field or add information to the request by clicking the New Line link. After an item which is available for supply has been located, its details are displayed under the **Request Details** tab.

The **Located Record** tab presents the bibliographic details of the record as it is cataloged in the supplier's catalog (if the Locate operation was successfully performed).

The **Requester** tab displays information about the requester, such as ID, name, address, and so on.

In the **Transaction** tab you can see all activity related to the specific request, including received and sent APDU messages.

The buttons on the Menu line of the lower pane can be used to handle an incoming request: **Message, Print, Locate, Answer, Ship, Return, Renew-Answer, Recall, Overdue, and Status Query**. These buttons are status-sensitive (that is, they depend on the request status).

6.2 Printing Details Of Incoming Requests From The List


To print details of an incoming request:

1. Choose one or several (all) records from the list.
2. From the menu bar, click **Print**.

For previously located requests, the details of the located record are printed as well.

6.3 Locating Incoming Requests

The Incoming Locate function enables you to locate a matching bibliographic record for items available for supply in the unit's circulation locate base. The outcome of the Locate action varies depends on the Circulation Handling type of the Lending ILL Unit. If the Circulation Handling type for the ILL Unit is defined as "Itemless", the incoming locate will proceed only to the level of matching a BIB record, otherwise the locate will proceed to the level of retrieving items which are available for supply. Circulation checks are performed in order to determine whether or not the available items can be loaned/copied to the requester.

- **Locate Query**
The locate query for an incoming request is built using parameters and locate strings defined in the tab_locate table of the \$data_tab directory of the ILL library.
- **Request Status**
If the attempt to find matching BIB records and an available item concludes successfully, the status of the request is updated to Located. In case of a Locate failure, that is, if the Locate was performed and no matching documents were found, the status of the request will be changed as defined in the ILL Unit Form (Fourth Tab) Auto Process (Mediated or Answer-Unfilled).
- **Multiple Locate**
When, as the result of a performed Locate, multiple matching BIB records are located, the message for a staff user appears and the screen for selecting and further processing one of the located records is displayed. If no selection is made, the request receives the status Multiple Located, and is moved to the relevant folder. If specific selection is made, the request status is changed to Located.
- **Locate Preview**
The possible results of a Locate before it is actually performed can be viewed using the Locate Preview window which pops up when the  button (in the upper pane)

is clicked. The locate preview includes a display of the locate query, and can be used to check the tab_locate setup.


6.4 Selecting All / Deselecting Records

To choose all records in the list for further handling, click **Select All**.

To remove the selection, click **Deselect**.

6.5 Shipping

When the requested item is supplied, there are two options for submitting the Ship message:

- From the menu bar of the lower pane, click **Ship**.
- From the menu bar of the upper pane, click .

When shipping material via the menu bar of the upper pane, specify the request number. Fill in the request number for which the action is performed in the Request Number field. All other fields are common for the ship action.

The following form appears:

Send APDU Shipped Help

Loan

Send Date: 20040609 (yyyyymmdd)

Send Method: Airmail

Supplied Media: Printed (Loan)

Item Barcode: BC5411545-414

Expected Return Date: +24 days

Note:

Copy

Send Date: 20040609 (yyyyymmdd)

Send Method: Airmail

Supplied Media: Printed (Photocopy)

No. Pages:

Page Size:

Note:

Electronic delivery

Send Date: 20040609 (yyyyymmdd)

Send Method: Electronic mail

Supplied Media: Electronic copy (URL)

Note:

URL:

Send Email

Select the relevant form: Loan, Copy or Electronic delivery, according to the format you are sending to the requester.

For Loaned Material

- **Send Date**
The date the item is shipped to a requester. The current date is automatically filled by the system. You can change it.
- **Send Method**
Choose the method for sending supplied material.
- **Supplied Media**
Choose the media format type for the supplied item.

- **Item Barcode**
Mandatory. Enter the barcode of the supplied item. If your ILL Unit is working in an ALEPH environment a loan transaction is created for the requester
- **Expected Return Date**
This is the Date by which you expect the material to be returned. Select the relevant loan period from the drop-down list. If your ILL Unit is working in an ALEPH environment, you may leave this field blank and the date is calculated based on a pre-defined circulation table. The expected return date is set as the loan due date.
- **Note:**
Text entered into this field will be attached to a shipped message, which is automatically sent to the requester.

For Copied Material

- **Send Date**
The date the item is shipped to a requester. Current date is automatically filled by the system, you may change it.
- **Send Method**
Choose the method for sending supplied material.
- **Supplied Media**
Choose the media format type for the supplied item.
- **Number of Pages**
Optional. Enter the number of supplied photocopied pages.
- **Page Size**
Optional. Choose page size of the photocopy.
- **Note**
Any text entered in this field will be attached to a shipped message, which is automatically sent to a borrower.

For Electronic Material

- **Send Date**
The date the item is shipped to a requester. The current date is automatically filled by the system. You can change it.
- **Send Method**
Choose the send method for the supplied material.
- **Supplied Media**
Choose the media format for the supplied material.
- **Note**
Any text entered in this field will be attached to the Shipped message that is automatically sent to a borrower and to the borrower's e-mail address (if the Send E-mail check box is selected). You can use this field to specify the rules and limitations regarding access to the supplied URL.
- **URL**
Enter the URL of the supplied material.
- **Send E-mail**
Select the Send E-mail check box if you want e-mail to be sent to the patron who asked for the material. The e-mail will include URL information and any text entered in the Note field.

6.6 Checking In Returned Material

When a loaned item is received back from the requester, there are two options for performing the item check-in and sending the CheckedIn message to the requester:

- Use the Check-In button on the main menu in the upper pane.
- Use the Check-In button on the menu line of the lower pane, to check in the displayed record.

The Check-In action is status-sensitive and is performed only for requests with the status **Sent on Loan**.

When registering material check-in via the main menu bar, the following form is used:

LENDING	BORROWING	ADMIN
Check-In	Ship	Search
New Request	Help	Log Off

Item Barcode:	B14587
Request Number:	
Note:	
	Submit

- **Item Barcode OR Request Number**

Enter the barcode of the returned item or the Request Number.

- **Note**

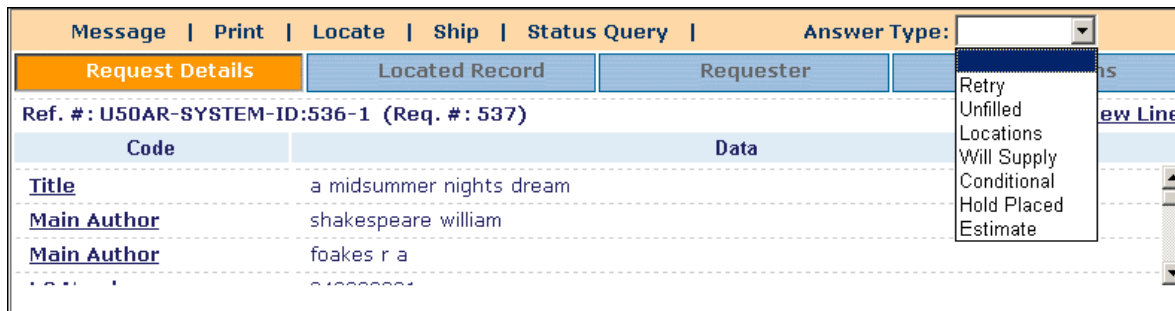
Any text entered into this field will be attached to a **CheckedIn** message, which is automatically sent to the borrower.

When check-in action is done via the Check-In button on the menu line of the lower pane, there is no need to specify Request Number or Item Barcode. The Note field is available for usage.

After submitting the Check-In form, a **CheckedIn** message is sent to the requester and the status of the incoming request is **Closed**.

6.7 Sending An Answer To Requester

The Answer option is available on the lower pane menu:



There are various types of answers, covering the types included in the ILL-Answer message protocol:

Retry, Unfilled, Locations, Will Supply, Conditional, Hold Placed and Estimate.

Clicking an answer type opens the relevant form for the APDU message (for example, Will Supply) including the reasons and additional information required by the protocol:

Submitting an answer changes the request status according to the answer type:

- Retry – changes status to Answer-Retry
- Unfilled - changes status to Unfilled
- Locations – changes status to Answer Locations
- Will Supply – changes status to Answer Will Supply
- Conditional – changes status to Answer Conditional
- Hold Placed - changes status to Answer Hold Placed
- Estimate- changes status to Answer Estimate

6.8 Recalling Requests

This option only applies to requests whose status is Received by Requester.

To send a Recall message to the requester:

- From the menu bar in the lower pane, click **Recall**.

6.9 Updating the Due Date Of A Recall

When the requester accepts your request for recall, you can update the item's loan due date by setting the new due date in the Update Recall window. The date you type is set as the new due date of the loaned item.

To update the due date of a request for Recall:

- From the menu bar in the lower pane, click **Recall Update**.

The following form appears:

Recall Update Help

Recall Date: (yyyymmdd)

6.10 Sending Overdue Messages to Requesters

This applies to requests with a status of Received by Requester.

To send an Overdue message to the requester:

- From the menu bar in the lower pane, click **Overdue**.

Overdue messages can also be sent by submitting the batch service: Lending Library Overdue and Lost Handling (ill-30).

6.11 Answering Requests for Renewal

This applies to requests which have been loaned to the requester.

To accept or reject the requester's request for renewal:

- From the menu bar in the lower pane, click **Renew Answer**. The Renew Answer APDU form appears for you to fill in.

6.12 Changing Status

The Change Status action allows you to change the request status. The statuses from which this action can be performed and the statuses to which the change can be done are set in a configuration table.

6.13 Sending a Status Query to the Requester

The Status Query option is available on the lower pane menu of each request. It is used to send a query to the requester as to the status of your request in his system. The Status Query Report reply is automatically triggered by the peer system and sent back to you with the status of your request.

To send a status query to a requester:

- From the menu bar in the lower pane, click **Status Query**. The Status Query APDU form appears for you to fill in.


6.14 Sending Messages to Requesters

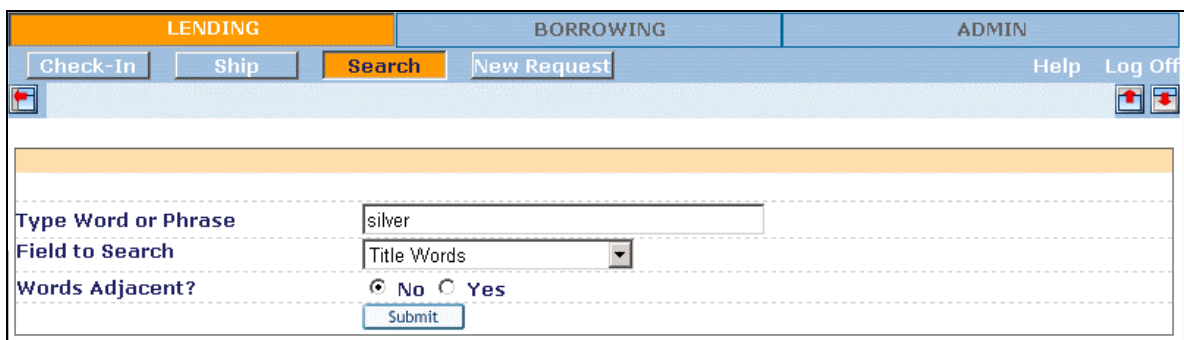
The Message option is available on the lower pane menu of each request. It allows you to send a free-text message to the requester.


6.15 Searching for Incoming Requests in the Lending Tab

The Search function is used to search for and retrieve incoming (lending) requests. The Search can be performed using Word Indexes such as Title Words, Subject, and so on or using Direct Indexes identifiers such as System Number, Barcode, Patron ID, and so on. Additional search indexes can be defined. The search indexes supplied in the standard setup are: Title Words, Actual Title, Author, Subject, ISSN, ISBN, System Number, Barcode, Borrowing Library, Requester Request Number, All Fields.

To start a search:

1. From the options bar of the upper pane in the Borrowing tab, click . The following search pane appears:



2. Choose the index to be searched and type in the relevant keywords.
3. Click . This sends your search query to the system.


As for search hints, see the [Searching For Outgoing Requests In The Borrowing Tab](#) section.

- **Type word or phrase**
Enter the search word or phrase.
- **Field to Search**
Select the index in which you want to perform the search.
- **Words adjacent?**
Select Yes if you want to limit the search to adjacent words.

6.16 Viewing the Status/Message Tree (Lending)

The **Status/Message Tree** for Lending requests is comprised of two modes: List and Tree. The **List** mode displays statuses that are currently present or are being processed. The **Tree** mode presents the status groups that can be expanded to display the statuses of the List mode, and available message types. The number associated with each status represents the number of existing requests for that status. Clicking the link under the number displays the list of requests for the selected status in the upper right pane (the link is present only when the number is not zero).

To retrieve a specific request, enter the request number in the **Request #** field and press Enter or .

To refresh the display of the **Status Tree**, click . The grouping of the Status Tree is configured in the ILL Unit's configuration tables.

- **Status/Message Tree for Lending Tab (Incoming Requests)**

Following is default setup for group of statuses/messages that are available for the requests being processed in the Lending tab, and the specific statuses/messages into which those groups can be expanded:

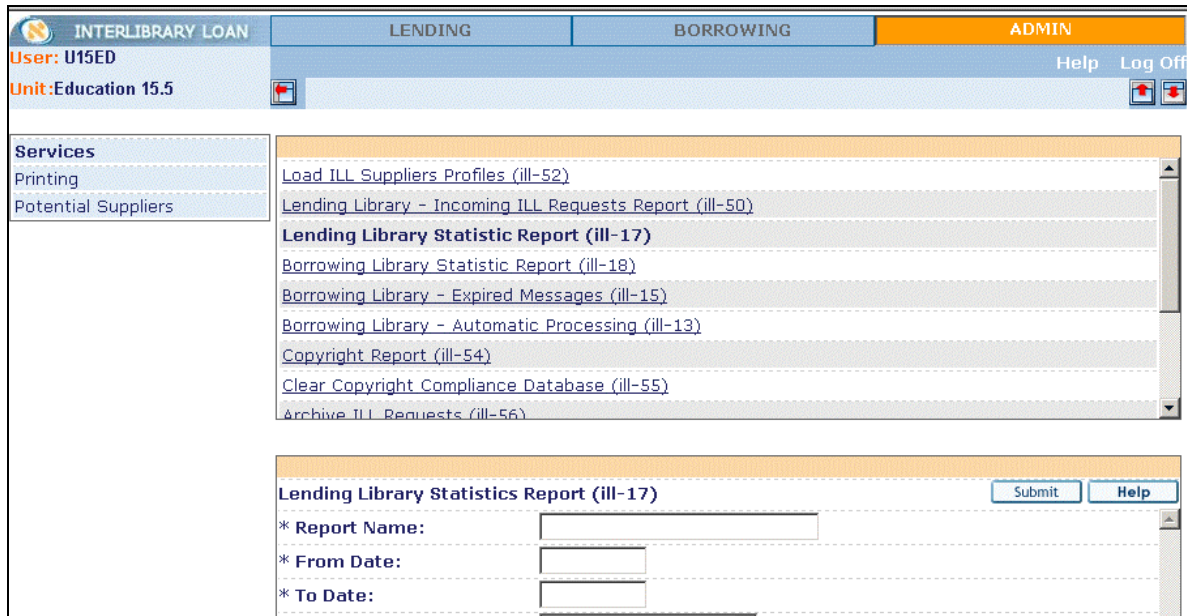
- **Review**
 - New
 - New-Staff Review
 - Located
 - Located and Printed
 - Mediated
 - Multiple Located
 - Referred
- **In Process**
 - Answer Will-Supply
 - Answer Hold-Placed
- **Shipped**
 - Sent on Loan
 - Sent as Copy
 - Requester Received
- **Return**
- **Conditional**
 - Condition Accepted
 - Answer Conditional
- **Cancel**
- **Overdue**
- **Recall**

- **Lost**
- **Damage**
- **Not Supplied**
 - Answer Retry
 - Answer Unfilled
 - Answer Locations
 - Answer Estimate
 - Expired
- **Closed**
- **Messages**
 - General Message
 - Cancel
 - Lost
 - Damaged
 - Status Or Error Report
- **Request for Renewal**

7 Using Services

You work with services in the Admin tab of the Staff ILL interface.

The Services window is divided into three panes: left, upper right and lower right:



You can change the display of the main window by using the left arrow, down arrow, and up arrow buttons.

Left Pane for Services

To access ILL Services, click the underlined **S**ervices option on the left pane:



Upper Pane for Services

The upper pane for Services contains the list of ILL Services. Click the link under the name of the service for a full display of the service interface in the lower pane. Help for each service is available from the lower pane.

- Load ILL Suppliers Profiles (ill-52)
- Lending Library - Incoming ILL Requests Report (ill-50)
- Lending Library Statistic Report (ill-17)
- Borrowing Library Statistic Report (ill-18)
- Borrowing Library - Expired Messages (ill-15)
- Borrowing Library - Automatic Processing (ill-13)
- Copyright Report (ill-54)
- Clear Copyright Compliance Database (ill-55)
- Archive ILL Requests (ill-56)
- Archive ILLSV Documents (ill-60)
- Locate Incoming Requests (ill-23)

- Lending Library Overdue and Lost Handling (ill-30)
- Scrubbing ILL Patron Information (ill-32)
- Process Request Submission Messages Sent by Mail (ill-72)

Lower Pane for Services

On the lower pane there is a full display of the service with all its parameters. Fill in the relevant information for each service and submit.

7.1 Available Services

The following batch services and reports are available in the **Services** link of the ILL Web Staff Interface:

7.1.1 Load ILL Suppliers Profiles (ill-52)

This service rebuilds the ILL suppliers profile from a flat file (Z701) and should be run after initial conversion for data load.

7.1.2 Lending Library – Incoming ILL Requests Report (ill-50)

This service enables you to retrieve ILL incoming requests, produce a report, and print a separate slip for each request. The service also enables you to update the status of all located requests from “Located” to “Located and Printed”.

7.1.3 Lending Library Statistics Report (ill-17)

This service produces a statistical report for the lending library. The statistical report includes the following information:

- Requester ID
- Total number of requests
- Number of pending requests - Requests that have not been shipped.
- Number of cancelled requests - Requests that have been cancelled.
- Number of unsupplied requests - Requests that have been answered with “Unfilled”.
- Number of filled requests - Requests that were shipped.
- Percentage of filled requests
- Average number of days for filling the requests - Number of days from the time the incoming request was received until it was answered with a Ship message.
- Average number of days for shipping the request - Number of days from the time the request was shipped until the requester sent a Received message.
- Average number of days for returning the request - Number of days from the time the request was returned from the requester until it was checked-in by the lending library.

7.1.4 Borrowing Library – Statistics Report (ill-18)

This service produces a statistical report for the borrowing library. The statistic report includes the following information:

- Supplier code
- Total number of requests - Requests that were sent to a supplier

- Number of pending requests - Requests that were sent to a supplier or shipped but have not yet arrived.
- Number of cancelled requests - Requests that were sent to a supplier and cancelled.
- Number of unsupplied requests - Requests that were sent to a supplier, who replied with “Unfilled”
- Number of filled requests
- Percentage of filled requests
- Average number of days for filling the requests - Number of days from the time the request was made until it was shipped
- Average number of days for shipping the request - Number of days from the time the requested material was shipped until the requester received it.
- Average number of days for returning the request - Number of days from the time the material was returned from the requester until it was checked-in by the lending library.

7.1.5 Borrowing Library - Expired Messages (ill-15)

This service tracks Outgoing Requests that have been sent to a supplier (status Sent to Supplier), for which no response was received within the number of days defined in the request's Expiry Days parameter.

The ill-15 service sends APDU expired messages for these requests and changes the supplier's status of the request from Sent to Supplier to Expired. If there are no other potential suppliers to which the request can be sent, the Patron Request Status is also changed to Expired. If there are additional potential suppliers that can be activated, the next Request to Supplier becomes active and its status is changed from Pending to New. The Patron Request status becomes Waiting for Processing.

Only requests managed by the ILL Unit to which you are logged in will be handled by this service.

7.1.6 Borrowing Library - Automatic Processing (ill-13)

This service works in conjunction with the ILL library table tab50, which is used for determining automatic processing for outgoing ILL requests.

When ill-13 is submitted, the system attempts to locate the list of potential suppliers for each patron request (Z410) by invoking Z701 - supplier profile. Only requests managed by the ILL Unit to which you are logged in will be handled by this service.

If the Locate operation fails, the Patron Request Status is changed to LOF (locate failed). If the locate operation is successful, a list of requests to suppliers (Z411) is created for the patron request. Each request to supplier has a sequential number (Z411-SEQUENCE) representing its position in the list. The first priority request to a supplier is assigned New as its status (Z411-STATUS). All other requests are assigned Pending status. At this stage, ill-13 invokes tab50 to determine what is the next automatic action for each request to supplier according to the filters defined in tab50.

The possible automatic actions are SEND and CANCEL.

SEND – An attempt is made to send the request to the supplier. If the Send operation is

successful, the Request to Supplier status is changed to SV. In the event of a failure, the status is changed to ENN (where NN represents the number of failures)..

CANCEL - Cancels the request to the supplier before it has been sent out. The configuration of tab50 determines how many times the Send action will be attempted before moving on to the next supplier in the list. If a technical problem in dispatching the APDU ILL Request to the target server has occurred (due to a problem in the target server), the request is automatically cancelled (Z411-STATUS changed to Cancelled. This triggers the next request to the supplier to become active (that is, its Z411-STATUS changes from Pending to New).

7.1.7 Copyright Report – (ill-54)

This service produces a report that counts how many outgoing requests per serial title the ILL Unit made in a specified period. It also counts how many different patrons have requested a particular title. This service requires that the service ILL-55 (Clear Copyright Compliance Database) be run once a year.

7.1.8 Clear Copyright Compliance Database (ill-55)

This service must be run at the end of each calendar year. It drops Z417 (Copyright Compliance table).

7.1.9 Archive ILL Requests – (ill-56)

This service enables archiving of incoming (lending) and outgoing (borrowing) requests. The archive records are written in the `data_scratch` directory of the ILL library.

7.1.10 Archive ILLSV Documents (ill-60)

This service enables archiving of ILLSV documents. The archived records are written into the archive directory at the ILLSV library's root. A new directory is created in the archive directory with a name that is made up of the "From" and the "To" dates in the following manner: {From Date}-{To Date}-{PID}. All archived records are written into this directory.

7.1.11 Locate Incoming Requests – (ill-23)

This service locates new incoming requests and attempts to locate a matching BIB record with items that are available for supply. Circulation checks are performed to determine whether the available items can be loaned/copied to the requester. The service also includes the option to update the status of located requests according to the result of the checks that were performed (optional).

If the attempt to find matching BIB records and an available item concludes successfully, the status of located requests is updated to Located. However, if the attempt to find matching BIB records and an available item fails, the request status is changed according to a predefined setup of the ILL Unit. Possible statuses are: Mediated handling or Answer-unfilled. If the status is Answer-unfilled, an APDU Answer-Unfilled message is automatically sent to the requester.

This service produces two types of printouts:

- Located Incoming ILL Requests Report - which lists all handled incoming requests, including request number, bib info, available items, if located (YES/NO) and

current or updated status of the request (the report form is `ill-unmediated-incoming-report`).

- Incoming ILL Request – Supply a separated Information slip for each request that has an available item for supply (optional). The slip includes full incoming request information, bib info and the details of available items, including barcode and location info (the report form is `ill-slip-incoming-report`).

7.1.12 Lending Library Overdue and Lost Handling – (ill-30)

This service retrieves all incoming loan requests already, which have the status Sent as Loan or Received by Requester. The ill-30 service checks the expected return date of the retrieved requests. If the expected return date is earlier than the current date the system attempts to send an overdue message to the requester (borrowing library).

When the system succeeds in sending the overdue message, the request status is changed to Overdue and it is reported as Overdue Message Successfully Sent.

When the system fails to send the overdue message, the request status is not changed and it is reported as “Overdue Message Failed”. The service produces two types of reports:

- Overdue Summary (the report form is `overdue-apdu-report-total`) - This reports the total number of overdue messages successfully sent to requesters and the total number of overdue messages that failed. In addition, the Overdue Summary report lists the number of successful and failed overdue messages for each lending library (responder unit).
- Overdue Statistics Report (the report form is `overdue-apdu-report-body`) - This report produces a slip for each combination of responder unit and requester unit. The report shows the number of successful and failed overdue messages. It also shows details for each request for which the overdue message failed.

7.1.13 Patron Link Removal – (ill-32)

This service erases patron details (for example, ID, name, address, e-mail, and so on.) from ILL incoming and outgoing request records to ensure patron confidentiality. The patron information is replaced with SCBYYYYMMDD, where the last 8 characters represent the service execution date. The service handles requests with the status of Cancelled, Closed or Deleted. The ill-32 service produces a report (`patron-removal-ids`), which lists all requests in which patron details were erased.

7.1.14 Create New ILL Request Sent by Mail (ill-72)

This service processes new requests that were created by Request Submission Messages (type RSMSG) based on mail that includes an XML file of an interlibrary loan REQUESTS. These are borrowing requests submitted by patrons.

ILL-72 handles the first part of processing RSMSG (a Request Submission Message). The user fills in the two arguments of the service parameters:

- 1.) the path for a UNIX directory, and
- 2.) the responsible ILL Unit that will process the outgoing request.

When activating the batch, the path provided by the user is searched for in a directory named "Incoming". If this directory does not exist in the path, the batch will conclude without any action being taken, since the XML files to be analyzed must exist only in the incoming directory. If such a directory exists and there are files in that directory, the batch will process all those files. It will create new ILLSV documents of the type RSMSG. After creating a new ILLSV document, the XML file will be transferred from the incoming directory to a processed directory. If there was an error that prevented the new document from being created, the file will be moved to an error directory instead of the processed directory.

From this stage, the processing of RSMSG is handled by UE-17: After ill-72 creates documents in the ILLSV library, UE-17 collects all new ILLSV RSMSG documents and creates new documents in the ILL library of the responsible ILL Unit (as provided by the user when submitting ill-72) and creates a new ILL outgoing record (Z410).

8 Printing

The Printing node of the Staff ILL interface, Admin Tab, enables you to see the list of existing printouts and reports produced by ILL services.

The Admin tab - Printing window is divided into three panes: left, upper right, and lower right. You can change the display of the main window by using the left arrow, down arrow, and up arrow buttons.

The screenshot shows the Staff ILL interface Admin Tab - Printing window. The window is divided into three panes. The left pane shows a navigation menu with 'Printing' selected. The upper right pane displays a list of printouts with columns for #, Option, Name, Size, Date, and Time. The lower right pane shows a table titled 'New Incoming ILL Requests' with columns for Lending Lib., Borrowing Lib., Req. No., Req. Status, Located Rec., Media, Open Date, and Need before date.

#	Option	Name	Size	Date	Time
1	<input type="checkbox"/> F P	.cvsignore	2	21/04/04	15:00
2	<input type="checkbox"/> F P	lend1	347788	08/06/04	15:11
3	<input type="checkbox"/> F P	ill-17	2397	08/06/04	15:11

Lending Lib.	Borrowing Lib.	Req. No.	Req. Status	Located Rec.	Media	Open Date	Need before date
SM2	SM1	20	LOC	0	L-PRINTED	07/12/2003	01/01/2004
SM2	SM1	22	LOC	0	L-PRINTED	07/12/2003	01/01/2004
SM2	SM1	255	LOC	32139	L-PRINTED	15/12/2003	01/01/2004
U1602	U1601	143	LOC	32139	L-PRINTED	10/12/2003	31/12/2003

Left Pane for Printing

To access the Printing window, click the underlined **Printing** option on the left pane:




Upper Pane for Printing

The Upper Pane for Printing contains the list of printouts produced by the ILL services. Various sorting and navigation options can be applied for efficient retrieval of the specific file from the list. You can sort the list by Name, Size, or Date in ascending/descending order; define the maximum number of records for display per page; or use the **Jump to** option to jump to a designated file (according to the search parameter). The records in the upper pane list can be handled separately or as a group (by choosing several/all records) using the buttons on the Menu line of the upper pane. The handling options available for the upper pane list are: **Select All, Deselect, Delete.**

Next to each line in the list there is a Full View **F** and a Print button **P**, which enables you to select a file for full display on the lower pane or to print it.

Lower Pane for Printing

The Lower pane of the Lending tab presents the full display of the file selected in the upper pane list (you can select a file for a full display by clicking the Full View  button). It can be used for viewing the contents of the file before or instead of printing.