Voyager®
ILL Module User's Guide for Version 6.3

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Chapter 1. About This Document

1.1. Purpose

This document provides instructions for configuring and using the Interlibrary Loan (ILL) module.

1.2. Intended Audience

This document is intended for customers who have purchased the ILL module for use with their Voyager systems.

1.3. Reason for Reissue

This user's guide is being reissued for the following reasons:

- Updated figures and content that reflect changes for the new features.

  Refer to the *Voyager ILL 6.3 Release Notes* document for a complete list of new features.

- Added Adding Entries for My URLs (page 7–16)

- Removed the *New Features in* ... chapter (previously chapter 2). The list of new features is provided in the release notes

- Consolidated all prerequisite content in the *Getting Started* chapter

- Updated the *Installing Voyager ILL Version 6.x* chapter to include FTP instructions for downloading the ILL software and any relevant prerequisite information from this chapter has moved to the *Getting Started* chapter

- Updated the *Installing Voyager ILL Version 6.x* chapter with the ILL Reports installation information

- Added the *ILL Reports Application* chapter

- Miscellaneous edits throughout the guide

Refer to the *Voyager ILL 6.3 Release Notes* document for additional release details.

Chapter 2. Getting Started

2.1. Introduction

This chapter describes the prerequisites for Voyager Interlibrary Loan (ILL).

2.2. Prerequisite Skills and Knowledge

To use this document effectively, you need knowledge of:

- Basic Microsoft® interface navigation

- Basic UNIX® commands and navigation

- Basic Voyager System Administration module

- Basic Circulation module

Refer to http://www.oclc.org for information regarding:

- OCLC Customer Support

- WorldCat Resource Sharing

- ILL Direct Request

2.3. Installation Prerequisites

Software requirements summary:

- Voyager ILL module 6.x

- ILL Request and ILL Management on client PCs and the server

- Voyager 6.2 and later

- Microsoft® Access XP, 2003, or 2007

- Internet Explorer 7 and later

- ILL StatusChecker server on a Windows Server or Workstation

- ILL Database (`cliodata.mdb`) on a Windows Server or Workstation

Hardware requirements summary:

- POP e-mail server

- See Section 2.3.2, "Server Requirements" (page 2–2)

The following sections provide a detailed description of prerequisites/requirements for the ILL client and server systems:

- Section 2.3.1, "Client Requirements" (page 2–2)

- Section 2.3.2, "Server Requirements" (page 2–2)

2.3.1. Client Requirements

The Voyager ILL 6.x client software can be installed on PCs running Microsoft Windows 7, Vista (Business or Enterprise), XP, or 2000.

The hardware requirements to run the clients are determined by which operating system you are running and how many other applications are also running on the PC. Generally, the minimum requirements for Voyager client machines should be adequate for the ILL client machines. Refer to the Voyager requirements documentation located in the Ex Libris Documentation Center.

Note

For smaller monitors, you may need to set the resolution to 800 X 600 in order to view some screens.

The software requirements include Microsoft Access XP, 2003, or 2007 installed on any machine using the ILL client software.

For Voyager ILL 5.4 and later versions, verify that Microsoft .NET Framework version 2.0 is installed on the ILL workstations. To verify if it is installed, go to Start > Control Panel > Add or Remove Programs. From the list of programs you should see an item labeled Microsoft .NET Framework 2.0. If the correct version is not present, go to the following page to download the software:

http://www.microsoft.com/downloads/details.aspx?FamilyID=
0856eacb-4362-4b0d-8edd-aab15c5e04f5&displaylang=en

Remove the old version before installing the new version.

2.3.2. Server Requirements

The number of ILL clients that need to connect to the server determines the necessary hardware (workstations and/or servers).

- For five or fewer Voyager ILL clients:

  The Microsoft Windows 7, Vista (Business or Enterprise), XP, 2003, or 2000 operating system is required to run the server software.

  For five or fewer Voyager ILL clients, the client software and server software may reside on the same system.

- For six or more ILL clients:

  You must install the server software on a Windows 2003 Server

  Microsoft Access 2003 or 2007 must be installed on the server. The hardware requirements for the ILL server software/database machine should meet the Microsoft recommended hardware requirements for the 2003 operating system.

Server requirements are based on the assumption that no other resource-intensive applications are running on the server at the same time. If there are multiple applications running simultaneously on the server, you must obtain a larger machine with more memory. The minimum amount of disk space that automatically comes with the server should be adequate.

Note

Those libraries who are currently running Clio software on a Novell server must still set up a Windows 2003 server for the Voyager ILL module. Part of the ILL server software needs to run as a Windows 2003 service. There is no NLM (Netware Loadable Module) available for the ILL server software that would allow for continued use of the Voyager ILL module on a Novell server.

Important

The ILL server machine must have a static IP address. If your institution uses dynamic IP address assignments (like DHCP), work with the network administrator at your site to get a permanent IP address assigned to the ILL server.

2.3.3. Current ILL Customer Prerequisite Considerations

You do not need to uninstall your current ILL software to upgrade to the new software.

When you upgrade from a previous version of Voyager ILL, some customization may not be saved through the upgrade process. Therefore, before you begin the installation procedure, take screen shots of the following:

- ILL Request > Options > Setup Email Server Information

- ILL Management > Voyager Preferences > Setup Voyager Comms

- ILL Management > Preferences > Data Directories

For ILL Request, go through the entire list in the Options menu to identify any customizations that you may have made.

For ILL Management, identify any customizations that you made through the following menus:

- Preferences

- Voyager Preferences

Be sure to preserve any account information relative to OCLC, Docline, the British Library, LADD, and so on.

Important

If you are currently using a version of the Voyager ILL module earlier than 5.5, you need to complete additional prerequisite steps such as updating your database using `ClioEndeavorUpdateDBTo50.mdb`. Refer to the ILL 5.5.pdf guide located in the Ex Libris Documentation Center for details. You cannot upgrade directly from a pre-5.5 version of Voyager ILL to a 6.x version of Voyager ILL.

Chapter 3. Installing Voyager ILL Version 6.x

3.1. Introduction

This chapter describes:

- Downloading software files

- Installation files

- Installation instructions

3.2. Downloading Installation Files

This section describes how to download the ILL installation files using FTP (File Transfer Protocol). These are the installation files for the server and for the client PCs.

Procedure 3.1. Downloading ILL Files Using FTP

1. Enter the following URL in your browser:

   `ftp://downloads.exlibrisgroup.com`

2. Enter `ill` for the User name.
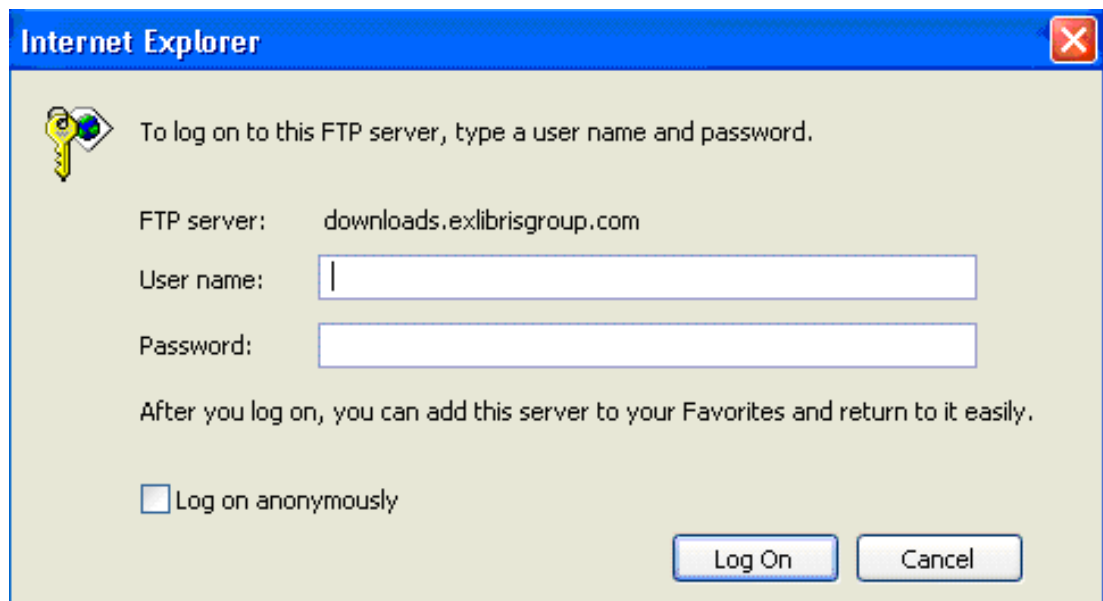
Figure 3.1. FTP Login

Note

The figures for this procedure are taken from Internet Explorer. This procedure may also be run with Mozilla Firefox but the information displays differently.

3.   Enter the password and click Log On.

Refer to the eService KB item number 16384-14369 for the password. If you cannot locate this KB item, call Voyager Support.

Note

You need to be a valid contact and be registered for ILL in order to receive a password.
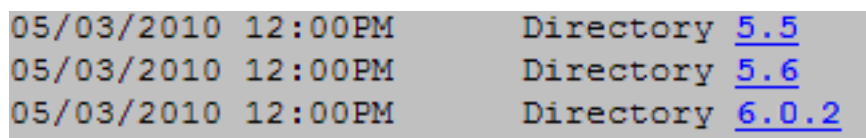
4.   Click the link for `clients` from the list of directories that display.

```
04/19/2010 01:47PM        Directory clients
04/19/2010 01:48PM        Directory UNICODE
```

Figure 3.2. List of Directories

A list of all ILL versions display.
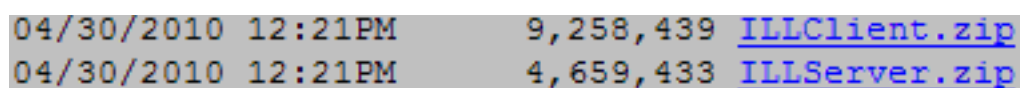
```
05/03/2010 12:00PM        Directory 5.5
05/03/2010 12:00PM        Directory 5.6
05/03/2010 12:00PM        Directory 6.0.2
```

Figure 3.3. Example Partial List of Version Links

5.   Click the link for the version that you need.

Links for `ILLClient.zip` and `ILLServer.zip` that contain the installation files display.

```
04/30/2010 12:21PM        9,258,439 ILLClient.zip
04/30/2010 12:21PM        4,659,433 ILLServer.zip
```

Figure 3.4. .zip File Links

6.   Click the link for `ILLClient.zip` and Save the file.

Repeat this step for the `ILLServer.zip` file.
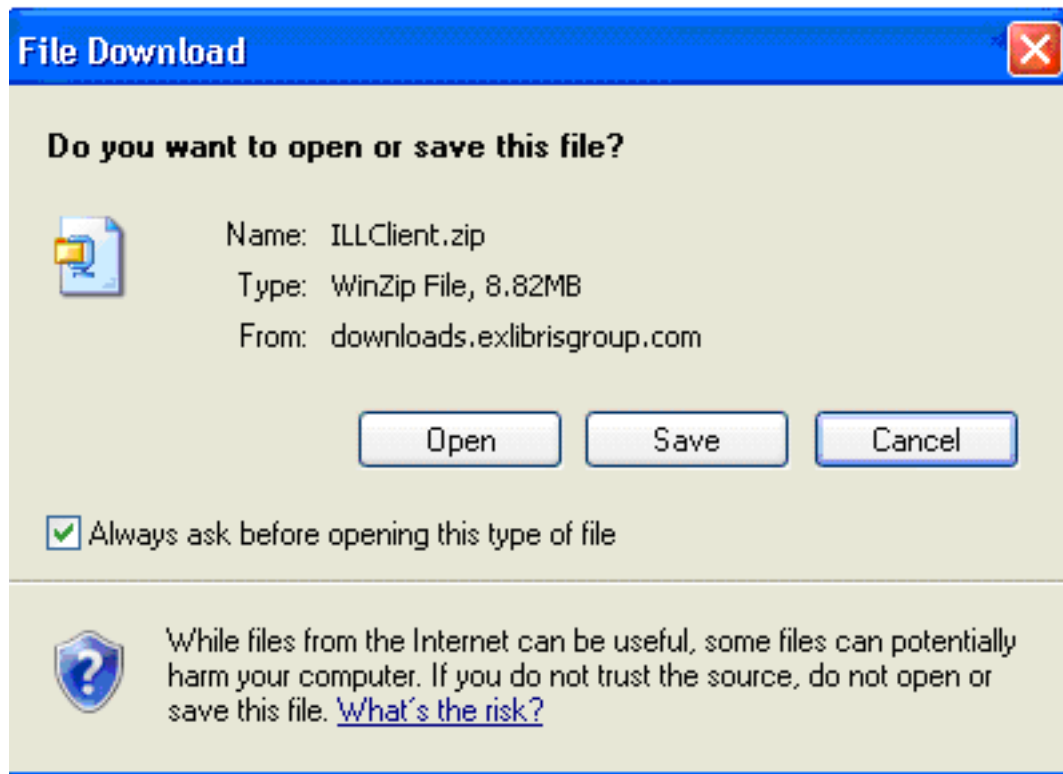
Figure 3.5. Save/Download .zip File

See the procedures located in the Section 3.5, "Installation Instructions" (page 3–4) section in this chapter for the steps to use these `.zip` files to install ILL.

3.3. The ILLClient.zip File

The `ILLClient.zip` contains the following files:

- `ExLibris6<release>.exe`

  (Example: `ExLibris63.exe`)

  This is the executable file that installs the ILL Request and ILL Management clients plus an XML parser for NCIP messaging.

  It includes LADD, Peer-to-Peer ISO and BL Secure Electronic Delivery features; upgrades built-in, e-mail clients to add the SSL feature to e-mail functions; and makes several improvements to the Docline user interface. After completing the installation with this executable file, run ILL Management first.

- `ExLibris6<release>ArtEmailComms.exe`

  (Example: `ExLibris63ArtEmailComms.exe`)

  The ARTEmail Communications module is used specifically for working with the British Library Document Supply Centre (BLDSC).

  This executable installs the communication application that sends and receives ILL information to and

from The British Library.

- `ILLReports<release>.exe`

  (Example: ILLReports10.exe)

  This executable installs the ILL Reports application that provides a front-end, user interface to Microsoft Access for generating ILL reports. See Chapter 11, *ILL Reports Application* (page 11–) for more information.

3.4. The ILLServer.zip File

The `ILLServer.zip` contains the following files:

- `cliodata.mdb`

  This is a blank version of the Voyager ILL 6.x database provided for new (versus existing) ILL installations.

- `SetupILLStatusServer.exe`

  This program needs to be installed on the ILL Server to ensure ongoing communication between ILL and Voyager.

  After installing to its default location on the Windows Server, click the Browse button and select the location of your `cliodatab.mdb` file.

  After installation, open the ILLStatusServer file on the server.

- `SetupISOComms.exe`

  This executable contains/extracts two modules for ISO Communications that installs to `C:\Program Files\Voyager_ILL\ISO\`:

  - `ISO_TCP_Receiver.exe`

  - `ISO_TCP_Sender.exe`

  The install program creates desktop shortcuts for these two files.

3.5. Installation Instructions

The installation instructions in this section are an example of how the Voyager ILL module can be installed. The instructions assume that you are installing the server software on a Windows server and the client software on individual PCs.

For more information regarding the WorldCat Resource Sharing, go to: http://www.oclc.org.

If you are using the British Library as a resource, you also need to download the software for connecting to and communicating with the British Library.

Note

If you are installing the ILL Status Server to a Windows Server, you must still install the ILL Management and ILL Request clients on the server. The Status Server requires Windows operating system support files which are installed when you install the clients.

Procedure 3.2. Installing Server Files on Your Server

Use the following to install the necessary files to your Windows server:

1. Log in to the Windows server as a user with administrative rights.

2. Download the client and server compressed files.

3. Extract the compressed (`.zip`) files to a folder on your server. (It may help to create a folder for each compressed file).

4. Create a shared folder named `C:\Program Files\Voyager_ILL` on the server.

5. Install the server files and proceed to Installing the Clients on Your Windows Server (page 3–5).

Procedure 3.3. Installing the Clients on Your Windows Server

Use the following to install the clients on your Windows server:

1. On the Windows server, open the `ExLibris6<release>.exe`. (See Section 3.3, "The ILLClient.zip File" (page 3–3).)

2. Follow the installation instructions/steps provided with the `.exe` file.

    ### Result

    This copies the files needed by the StatusChecker server software that runs on the Windows server. The files are copied to `C:\Program Files\Voyager_ILL` and two desktop icons are created, one for ILL Request and one for ILL Management.

3. Follow the installation instructions for the XML parser. (The XML parser software installation begins after the clients are installed.)

4. Continue the installation process with the next procedure.

Procedure 3.4. Copying and Installing Client Files on Individual PCs

Use the following to install the client files on each individual PC that is using the Voyager ILL module:

Important

You must install these client files on each individual PC you plan to use for ILL transactions. You can install one or both components on a PC. For example, if you have student workers who only use ILL Request, you can install only that component on the PC the students are using.

1. Copy the `ExLibris6<release>.exe` file from the Windows server to the PC.

2. Open the `ExLibris6<release>.exe` file.

Result

This starts the installation wizard. The process creates one folder in the Program Files folder labeled `Voyager_ILL`. It also adds two shortcuts to the desktop called ILL Request and ILL Management.

3. Double-click the ILL Management icon on the desktop to run the program.

Note

You may receive an error message stating that ILL Management needs to locate the ILL Database (`cliodata.mdb` file).

4. Navigate using Network Neighborhood to the shared directory on the Windows server on which you have installed the ILL Database.

5. Open the `Voyager_ILL` folder and double-click the `cliodata.mdb` file.

6. Double-click the ILL Request icon on the desktop to run the program.

Note

You may receive an error message stating that ILL Request needs to locate the ILL Database (`cliodata.mdb` file).

See Figure 3.6, "Error message from ILL Request" (page 3–6).
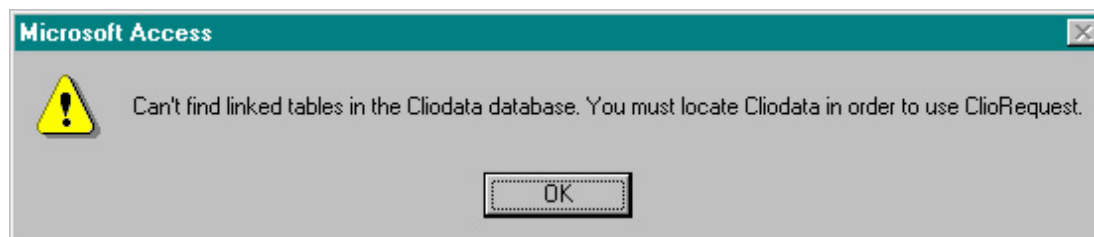
Figure 3.6. Error message from ILL Request

7. Navigate using Network Neighborhood to the shared directory on the Windows server on which you have installed the ILL Database.

8. Open the `Voyager_ILL` folder and double-click the `cliodata.mdb` file.

9. Set up the Options in ILL Request and Preferences in ILL Management.

If you are using the British Library as a resource, the ILL module needs to know certain information about your accounts at the British Library. See the chapter regarding ARTEmail for more infomation regarding setup.

10. Continue to Installing Software for British Library Support (page 3–7) if you are a British Library customer.

Procedure 3.5. Installing Software for British Library Support

Use the following to install the software necessary for communicating with The British Library:

1. Open the `ExLibris6<release>ArtEmailComms.exe` file on the Windows server.

2. Follow the installation instructions provided by running the `.exe` file.

    Note

    The destination directory for ARTEmail Comms is `C:\Program Files\Voyager_ILL\`.

3.5.1. ILL Reports Application Installation

The ILL Reports application is another piece of software that resides on the client PC along with ILL Request and ILL Management. It consists of a Microsoft Access file and ILLReports.mdb. This application can be installed using the `ILLReports10.exe` executable file.

ILL Reports is different from ILL Request and ILL Management in the following ways:

*   The location of the main ILL database is stored in a separate file in the installation folder. As a result, ILL Reports is aware of the database location when a new version is installed.

*   The application details are visible to you. The code for the reports and independent code modules can be examined as examples of how reports are constructed for new reports that you may want to create.

Procedure 3.6. Installing ILL Reports

Use the following to install the ILL Reports application on the client PC:

1. Double-click the `ILLReports10.exe` file from the folder where you stored it in the downloading step.

    This opens the installation wizard for `ILLReports10.exe`.

2. Follow the instructions provided in the installation wizard.

    When the installation is complete, an ILL Reports icon/shortcut is installed on the PC desktop.

3.5.2. ILL Status Server and the ISO Client Installation on the ILL Server

If your site is running five or fewer ILL client installations, you may run the Voyager ILL client and server software on the same system running Microsoft Windows 7, Vista (Business or Enterprise), XP, 2003, or 2000.

If your site is running six or more ILL client installations, you need to install the server software on a Windows 2003 server.

Important

The ILL Server must have a static IP address.

Procedure 3.7. Installing the ILL Status Server and the ISO Client

1. Follow the installation instructions provided earlier in this chapter.

   The ILL Status Server must also have the clients installed.

2. Make a backup copy of the current `cliodata.mdb` file. Save it to a known location.

3. Download the `ILLServer.zip`.

4. Unzip the file.

5. Double-click `SetupILLStatusServer.exe`.

   ### Result

   The installation wizard opens.

   The destination directory where your ILLStatusServer must be installed is `C:\Program Files\ILLStatusCheckerServer`.

6. To begin working with ILL using a new database, move the blank `cliodata.mdb` file into your `C:\Program Files\Voyager_ILL directory`.

7. You must also install the `ISO_TCP_Receiver.exe` and `ISO_TCP_Sender.exe` on your server if you would like to set up ISO peer-to-peer lending or you are working with LADD.

8. Double-click `SetupISOComms.exe`.

   ### Result

   The installation wizard opens.

   ### Important

   The destination directory where the ISO TCP Communications Module must be installed is `C:\Program Files\Voyager_ILL\ISO\`

   ### Result

   After the installation of ISO Comms you see two icons on your server's desktop, ISO_Sender and ISO_Receiver.

3.5.3. Link Clients to the ILL Database

Direct the ILL clients to the ILL database using Linking the ILL Clients to the ILL Database (page 3–8).

Procedure 3.8. Linking the ILL Clients to the ILL Database

1. Share your `C:\Program Files\Voyager_ILL` directory that is on your ILL server so that other ILL PCs can access your `cliodata.mdb` through the network.

Important

On every PC and server that is associated with your ILL usage, the proper version of Microsoft must be installed. See the Getting Started chapter for specific requirements.

2. Open and link ILL Request first when accessing clients after your upgrade to ILL 6.x (unless directed otherwise in a particular service pack).

Result

When you open any of the ILL clients or `StatusServer.exe`, the system displays a message indicating that it needs help finding the database.

3. On the ILL server, navigate to the `C:\Program Files\Voyager_ILL` folder. Your `cliodata.mdb` file is in that folder.

4. On the other ILL PCs you are using, you need to repeat the previous step, but you locate the `cliodata.mdb` via a network connection on the ILL Server not on the local PC.

Result

You have now successfully installed Voyager ILL 6.x.

Chapter 4. Setting up the Voyager Interlibrary Loan Module

4.1. Overview

This user's guide discusses the following:

- Initial configuration of the ILL software

- Overview of the Voyager Interlibrary Loan (ILL) module

- Interaction between the ILL Module and WebVoyáge

- Installation and technical requirements

- Configuring your Voyager system for ILL

- How ILL Request and ILL Management function

4.2. Initial Configuration for ILL Software

This section contains the initial post-installation configuration necessary to operate the Voyager ILL software. This configuration includes the following:

- Server set up (including single workstation client/server configurations)

    - - Voyager server files to edit

    - - Status Server configuration (on Windows server or workstation)

- Client set up

    - - Voyager NCIP server information

    - - Email server information (ILL Request)

4.2.1. Server Configuration

This section contains information on initial configuration for your servers (Voyager and ILL).

4.2.1.1. Voyager Server Files to Edit

Edit the `voyager.env` file on your Voyager server (in `/m1/voyager/xxxdb/ini`) to add the ILL server IP address and port.

Procedure 4.1. Editing the voyager.env to Include the Dedicated IP Address and Port Information for the Status Server

Use the following to edit the `voyager.env` file:

1. Log on to the Voyager server.

2. Change to the `/m1/voyager/xxxdb/ini` directory.

3. Open the `voyager.env` file and scroll to the section labeled CLIO Server.

4. Enter the dedicated IP address for the Windows server on which Status resides after the export `CLIO_SERVER=variable`.

5. Enter the port number after the export `CLIO_PORT=variable`.

    You can make this port any number you want such as 7777 as long as it is not already in use as a dedicated port for any of your Voyager modules.

6. Save the changes.

    Note

    If you do not find a CLIO Server section in the `voyager.env` file, you must add the information.

    The CLIO Server section of the `voyager.env` should look like Figure 4.1, "CLIO Server section of the voyager.env" (page 4–2) with your server IP address and port information replacing the x's.

```
#########################################################################
##      CLIO Server
export CLIO_SERVER=xxx.xxx.xxx.xxx
export CLIO_PORT=xxxx
export LOG_CLIO_COMM=1
#########################################################################
```

Figure 4.1. CLIO Server section of the voyager.env

4.2.2. Status Server Configuration

Before you can use any of the Voyager ILL Module clients, you must configure the Status Server on your ILL Windows Server. See Configuring the Status Server (page 4–2).

Procedure 4.2. Configuring the Status Server

Use the following to configure the status server software on your Windows Server or workstation:

1. Open the Status Server on the Windows server.

    Result

    The Status Server configuration dialog box opens. See Figure 4.2, "Status server dialog box" (page 4–3).

    The **My IP Address** field displays the IP address of the Windows server.
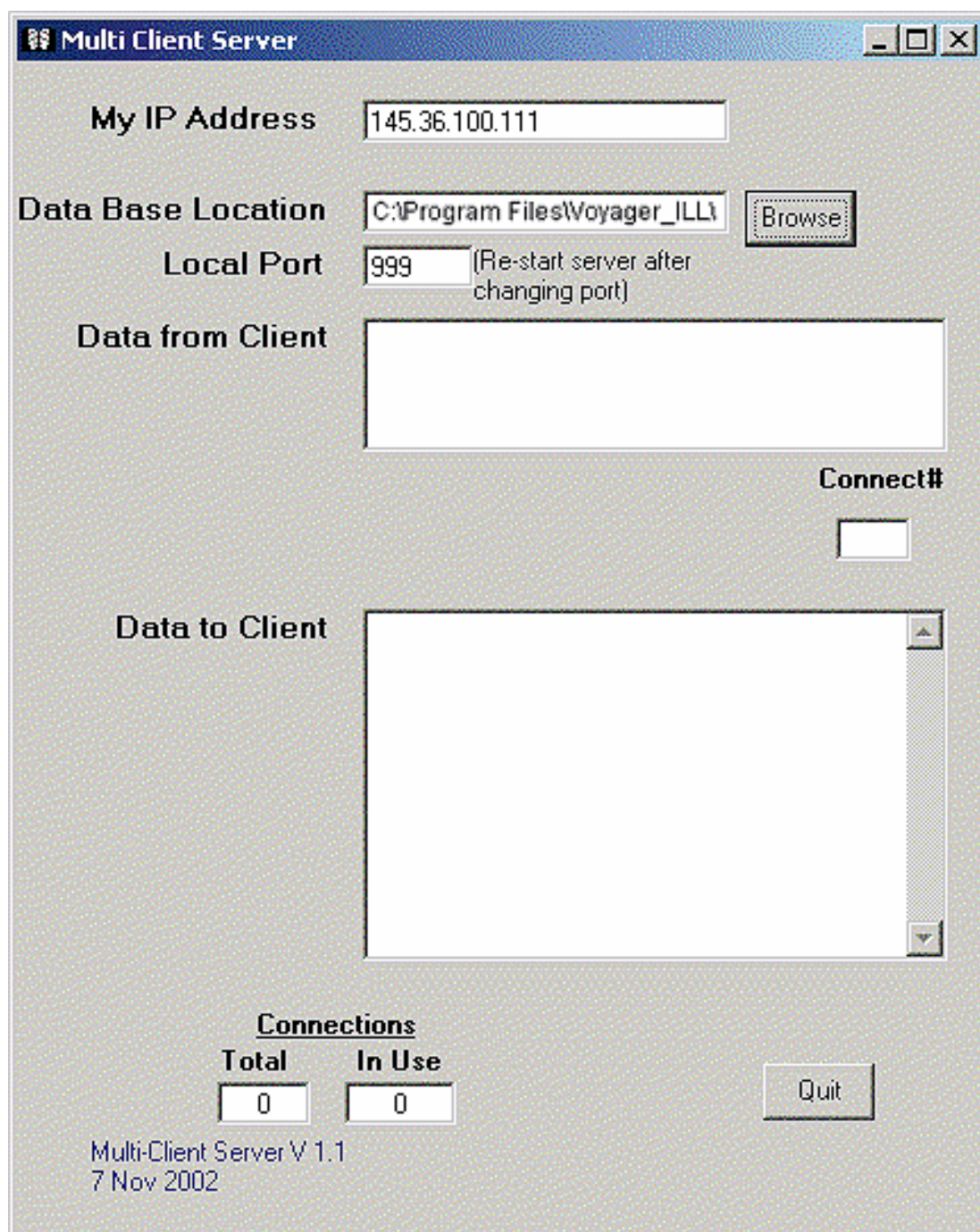
Figure 4.2. Status server dialog box

2. Click **Browse** and select the location of your cliodata.mdb file (`C:\Program Files\Voyager_ILL`) for **Data Base Location**.

    Result

    Local Port displays the port of the Windows server.

3. Enter the same port as in `voyager.env` for **Local Port**.

4.   Click **Quit** to save your changes.

Important

Changing information in the Status server dialog box is the only time you click the Quit button. Status Server must be running at all times in order to display real-time patron information in WebVoyáge for ILL requests.

5.   Restart Status Server.

4.2.3. Client Setup

This section includes the initial configuration for the Voyager ILL Module clients. For more information about the remaining set up for the clients, see Chapter 8, *ILL Management Configuration* (page 8–) and Chapter 7, *ILL Request* (page 7–).

Procedure 4.3. Configuring the NCIP Server

Use the following to configure the NCIP server:

1.   Open the `/etc/services` file on your server.

2.   Locate the entry that begins with `Pncipsvr`.

```
Pncipsvr        9075/tcp                #NCIP
Server
```

3.   Open ILL Management.

4.   Go to **Voyager Preferences>Setup Voyager Comms**.

Result

The Voyager **NCIP Preferences** dialog box displays. See Figure 4.3, "Voyager NCIP Preferences dialog box" (page 4–5).

Figure 4.3. Voyager NCIP Preferences dialog box

5. Enter your NCIP preferences (including the port of the NCIP server from the `/etc/system` file) using the instructions found in Table 4.1, "Voyager NCIP Preferences" (page 4–5).

Table 4.1. Voyager NCIP Preferences

Component	Description
Remote IP Address	Enter IP address of your NCIP server (valid IP address of Voyager server).
Remote Port	Enter port number of your NCIP server. Default=7075.
UserName	Enter Voyager ILL operator ID used to create bibliographic records, holdings, and items and place holds in the Voyager Circulation module.
	Note
	Any valid Voyager ILL operator ID with appropriate privileges (see Circulation Profiles in Voyager System Administration) may be entered.
	Note
	Uses policy defaults for item type, item location, and OPAC suppress.
	• Attach holdings to Any Bibliographic

Component	Description
	Record
	• Add/Update Item Records
	• Add/Update Recall/Hold Requests
	• Charge/Renew
Password	Enter the password for the operator ID entered in the UserName field.
Location Code	Enter Voyager Circulation location used to create bibliographic records, holdings, and items and place holds in the Voyager Circulation module. **Note** Any valid Voyager Circulation Location Code may be entered.
Send Shipped To Voyager	Select this check box to indicate that Voyager deletes records when the ILL item is returned. The record deletion messages queue is sent to Voyager. If this preference is not selected, records and items are not deleted after being returned.
Timeout Interval (ms)	Enter the amount of time such 90000 after which the connection attempt is aborted if no database connection is made or if there is no reply from the Voyager server. **Note** The time interval is measured in milliseconds.
Barcode Option	Select Barcode Required, Use ILL Number As Default. This option does not allow ILL requests to be received without information entered into the barcode field and automatically generates an item barcode using the ILL number. **Note** Barcodes automatically generated from ILL numbers beginning with a "-" strip the "-" from the ILL number before generating the barcode. You may also select Barcode Required. This option does not allow ILL requests to be received without information entered into the barcode field. You may also select No Barcode Required. This option allows barcode requests to be received without an entry in the barcode field.

6. Click **Exit**.

4.2.4. Email Server Information (ILL Request)

Before sending and receiving ILL requests, you must enter your email server information in the ILL Request Module. This is done from the **Options** menu.

Procedure 4.4. Email Server Information Setup

Use the following to configure your email server for use with ILL Request:

1. Open ILL Request and click **Options**. See Figure 4.4, "ILL Request Options menu" (page 4–8).
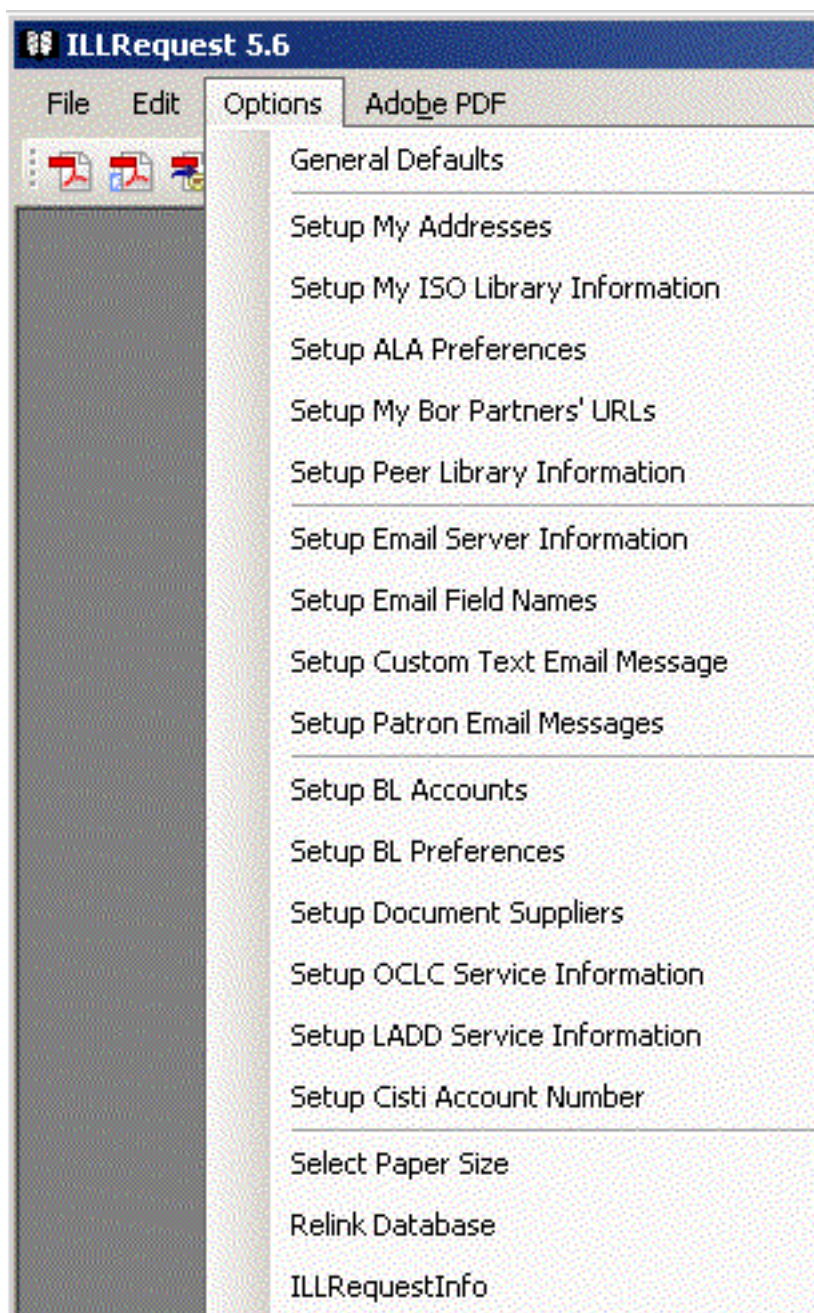
   Figure 4.4. ILL Request Options menu

2.   Select **Setup Email Server Information** from the **Options** menu.

   ### Result

   The **My Email Information** dialog box displays. See Figure 4.5, "My Email Information dialog
   box - Borrowing account" (page 4–9).

Figure 4.5. My Email Information dialog box - Borrowing account

3. Tailor the field settings to meet your needs. See Table 4.2, "My Email Information" (page 4–9) for additional instructions regarding these settings.

4. Click **Close** to save your settings.

Table 4.2. My Email Information

Component	Description
My Incoming Email Server	Enter the IP address or the domain name of the server to which the ILL requests are sent.
Server Type	Select POP3 from the drop-down list.
Incoming SSL in use	Select Yes or No (site dependent).
Delete Mail From Server	Select Yes to have ILL email requests deleted after ILL staff have retrieved from the server. Select No if you do not want any ILL email requests deleted from the server. **Note**

Component	Description
	You may download the same requests each time the requests are retrieved if you select No.
Subject Line is Blank	Select No. This forces ILL Request to identify ILL requests based on pre-defined terms in the subject line specified in the Message Subject Line fields on this dialog box (My Email Information). **Note** This field is not necessary for a Lending account type.
My Outgoing EMail(SMTP) server	Enter the IP address or the domain name of the server to which any email or ALA-form ILL requests are sent.
Outgoing SSL in use	Select Yes or No (site dependent).
My Email Return Address	Enter an email address. **Note** This is used in the From portion of the ILL email request header. **Example 4.1. Example** From: ILL Staff<illstaff@univ.edu>
My Name	Enter a name associated with the email address you entered in My Email Return Address field. **Note** This is used in the From portion of the ILL email request header. **Example 4.2. Example** From: ILL Staff<illstaff@univ.edu>
Password authentication in use	Check for password authentication.
SMTP Account	Enter your SMTP (Simple Mail Transfer Protocol) account.
SMTP Password	Enter the password for your SMTP account.

Component	Description
Incoming Email Account Information Account Login Password	Enter the Login and Password for accessing the email server. **Note** Do not enter an alias for the Login.
Message Subject Lines	Enter the following subject lines (matching upper/lowercase exactly as indicated): ILL EMail Request ART EMail Request ILL ART EMail Request These subject lines are unique ILL request identifiers. ILL EMail Request is used for ILL Loan and ILL Photocopy request forms. ART EMail Request is used for the ILL ARTEmail Loan request form. ILL ART EMail Request is used for the ILL ARTEmail Photocopy request form. ILL Request holds (in a queue for later processing) incoming ILL email requests that match these subject lines.

4.2.5. Email Server Information - Set Up Lending Email from a Web Form

When you click on the Get Text Email button, ILL attemptd to read the email for the account you specify in Preferences/Email Setup. See Figure 4.6, "Setup Email Server Information" (page 4–12).
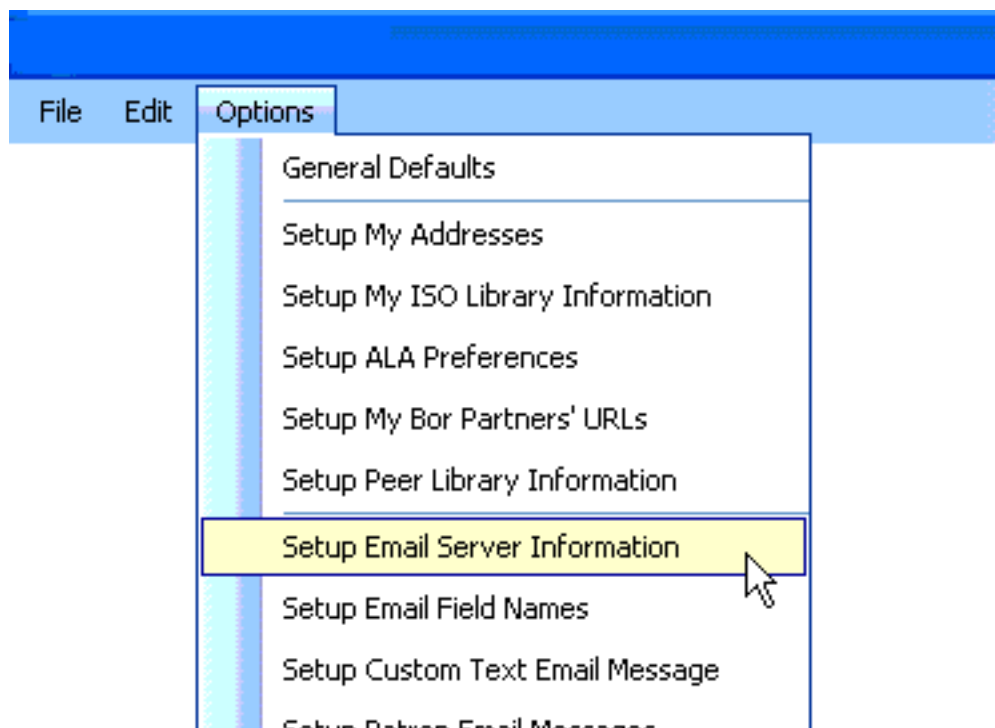
Figure 4.6. Setup Email Server Information

ILL can communicate with POP3 or IMAP4 email accounts. You also have the option to delete the mail from the server once the requests have been read into ILL. It is recommended that you use a dedicated email account for receiving your Lending request emails.

If you create your own Web page and make it available for borrowing libraries to use when requesting items from you, you should ensure that the contents of the form are sent in a text email to your lending requests email address. Make sure those emails have the following format:

Patron Name:

Title:

Author:

Imprint:

Edition:

Article Title:

Vol:

No:

Date:

Pages:

Verified:

ISBN/ISSN:

Needby:

MaxCost:

Notes:

Call Number:

Borrow Symbol:

Publisher:

Place of Publication:

Publication Date:

These field names should, of course, be followed by the appropriate value. For example, the first line of a lending request email might look like this:

Patron Name: Perkins, Richard

The field name labels can be changed by going to Preferences/Lending Web Form setup, but if you wish to use the Get Text Email process to receive requests from other institutions who send email requests using ILL, you must not change the field labels from their default settings.

If you want your web form to have more fields than the fields listed above, it is possible to arrange the results of your web form to be read into ILL properly. This is done by having any non-standard fields in your emails appended to a standard field like the Notes: field. For example, if you want to have a field called Language on your Web form, you could have that field placed after the Notes: field in your emails, like this:

Notes: Need ASAP

Language: English

Call Number: 24824243432

In this example, when ILL scans this email for field names it recognizes, it sees Notes: and Call Number:. Everything in between is assigned as the value of the Notes field. In this case, the Notes look like:

Need ASAP Language: English

In this way you can collect non-standard pieces of information that are useful to you but that do not have a home in our email format or regular ALA-type messages. If you need assistance setting up ILL to read your web form, contact Ex Libris Support.

When you click the Get Text Email button, a status window is displayed showing the number of requests that ILL found and read in.
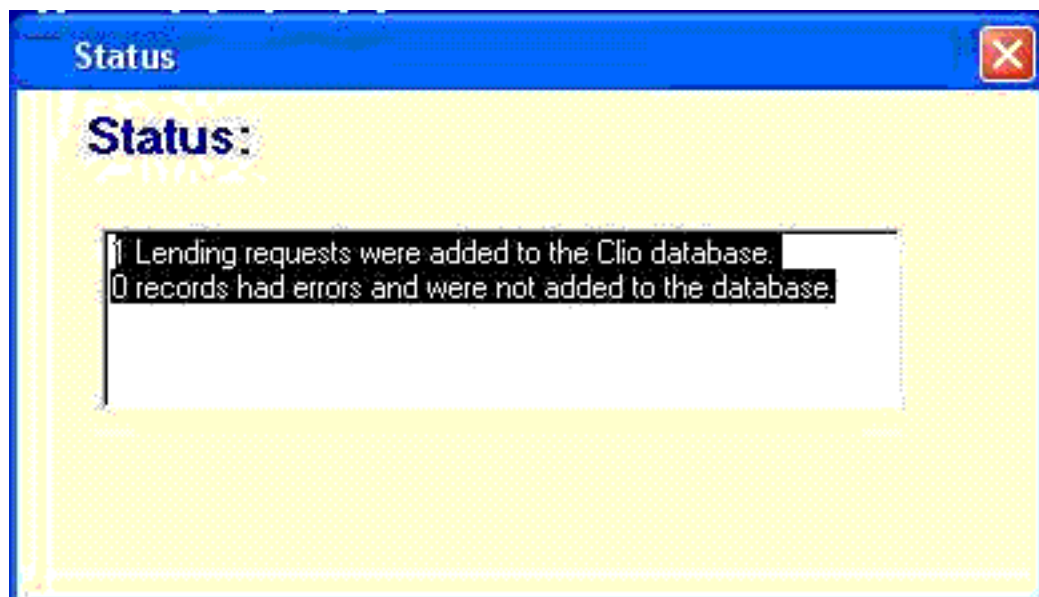
Figure 4.7. Status Window

The requests that are read into ILL are placed into the same Lending Request Review queue as requests received from OCLC or Docline. If the lending request contains a call number then it is flagged automatically for printing a pick slip.

4.2.6. Adding a New Library to the Library Table

ILL Request has the ability to create a new entry in the library table. It was added for ISO users primarily but is also handy for other users. (Creating your own library symbol or a dummy symbol for statistical purposes are two possible uses.)

Select Options / Setup Peer Library and fill in the fields. That's all you have to do!

4.3. Overview of the Voyager ILL Module

In partnership with Clio Software, Ex Libris (USA) Inc. offers an integrated Interlibrary Loan (ILL) and document delivery management module. This module enhances Voyager's existing ILL functionality.

Clio, an industry leader in ILL software, is a sophisticated system by which your ILL requests are placed, managed, tracked, and reported. Clio's architecture integrates fully and seamlessly with the Voyager environment. The new ILL Module is integrated with Voyager in that functionality is streamlined and easy-to-use straight from your Voyager system. In this way, patrons can place and track interlibrary loan requests directly from the Voyager OPAC, while ILL operators benefit from Clio's proven and advanced tracking and statistical reporting capabilities.

4.3.1. What Voyager's ILL Module Offers

In short, Voyager's ILL Module provides the following:

- Validated, patron-initiated requests

- Real-time request status updates in WebVoyáge

- Full tracking of requests, including copyright compliance

- Extensive and customizable reports

- Interface with OCLC, The British Library, Infotrieve, Docline, Ariel, and LADD (Libraries Australia Document Delivery)

- Customizable ILL request forms

- Blank ILL request forms

- Full integration with Voyager, including ability to search local OPAC from within the ILL interface

- Automatic bibliographic record creation, item creation and hold placement using NISO Circulation Interchange Protocol (NCIP) messaging

4.4. Interaction Between the ILL Module and WebVoyáge

The following sections detail the interaction between the ILL Modules and WebVoyáge:

4.4.1. Borrowing Requests

The ability for a patron to access a remote database and then request an item from the database through one session on WebVoyáge is just one of the many advantages of implementing the Voyager ILL Module.

4.4.1.1. WebVoyáge to ILL Module

The interaction between the ILL Module and WebVoyáge is as follows (see Figure 4.8, "Request interaction between Voyager and the ILL Module" (page 4–16) for a visual illustration of this process):

1. A borrowing request is placed by a validated patron in WebVoyáge. The borrowing request is an OPAC request form created in the Voyager System Administration module.

2. The request is sent (through a structured e-mail message) by the OPAC Server to a dedicated e-mail account established for the ILL Module.

3. ILL Request receives the e-mail request in its dedicated account and the request is processed. Processing a request may require little or no intervention by an ILL operator, depending on options and preferences set in ILL Request. When a request is processed it is saved in the ILL database.

4. Once the request is processed, it is routed to a lending institution or a mediating agency such as OCLC. The type of request as well as the ILL configuration (or an ILL operator) determine the lending institution. The lending institution fulfills the request and sends the requested item to the borrowing institution.

5. Any time after the request is saved in the ILL Database, a patron can view the status of his request in WebVoyáge. When the requesting patron logs in to WebVoyáge to access his patron information, the OPAC server queries the request status in the ILL Database, and it is displayed in the Requests Pending section on the patron information page in WebVoyáge.

6. When a returnable item is received by the library, brief bibliographic, holdings, and item records are automatically created for the item in the Voyager database using NISO Circulation Interchange Protocol (NCIP) messaging (through the ILL Management>Borrowing>Send Circ Updates to Voyager screen). A hold request is created for the requesting patron when the item is discharged at its pickup location and a notice is generated alerting the patron to the available item. Loaned items display in the Items Available section after they reach the designated pickup location.

7. If photocopies are requested and then received, the status of the request is updated in ILL Management to received. The next time the patron logs into WebVoyáge and accesses his patron information, the request displays in the Items Available section of the patron information page. Brief records for photocopies are not created since they are usually not returned to the lending institution. As a result, there is no need to track them.
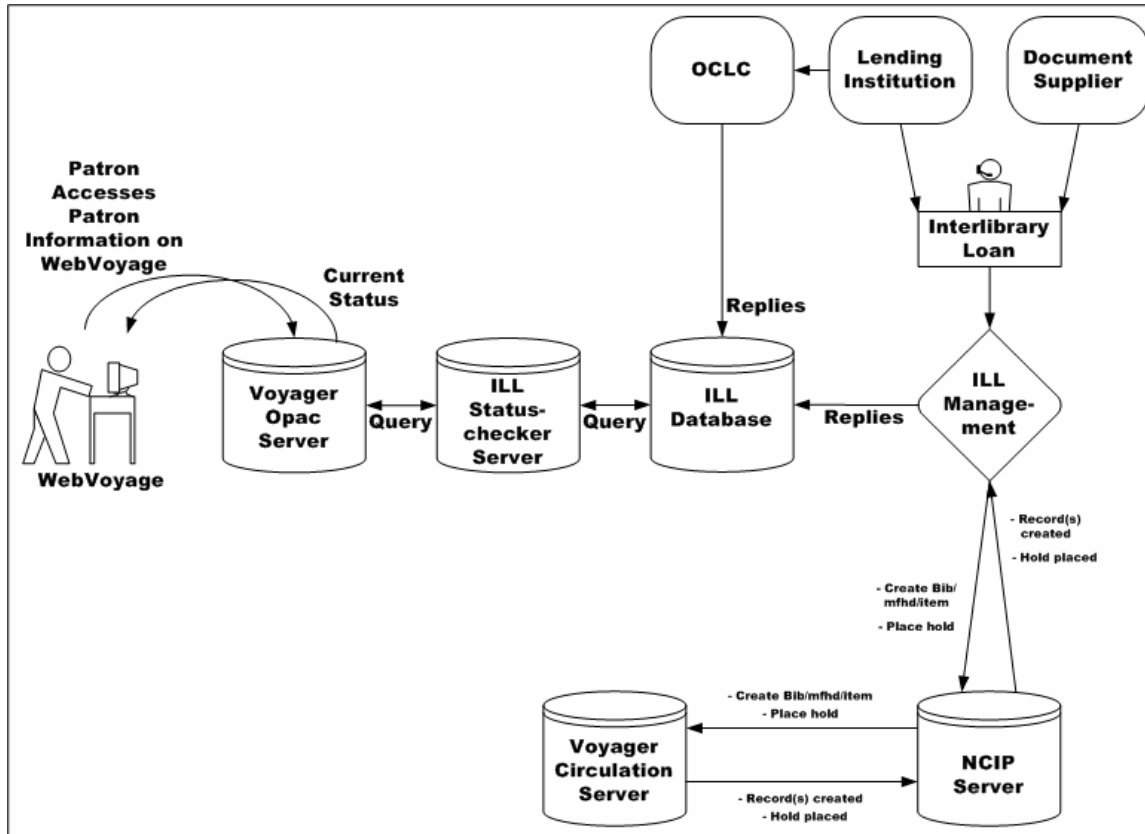
Figure 4.8. Request interaction between Voyager and the ILL Module

4.4.1.1.1. Creating Records, and Placing Holds Automatically

Once loan material is received by ILL Management, it updates Voyager Circulation using NISO Circulation Interchange Protocol (NCIP) messaging. These messages are sent to an NCIP server which sends a message to the Voyager Circulation server instructing Circulation to create a Bibliographic record, a MFHD, and an item record, and place a hold on that item (see Figure 4.9, "Sending updates to Voyager Circulation" (page 4–17)).

ILL Management

Voyager Updates to Send

Items waiting:		Items with errors:	
Need Bib Item/Hold Created	1	**Create Bib Item Messaging Error**	0
Ready to Return	3	**Place Hold Messaging Error**	0
Create Bib Item Processing Error	0	**Ship Item Messaging Error**	0
Place Hold Processing Error	0	**Other**	0

Display Error Details

Close

Form View   NUM

Figure 4.9. Sending updates to Voyager Circulation

When updating Voyager Circulation, ILL Management formulates the instructions to the Voyager Circulation server in XML format in accordance with the NISO Circulation Interchange Protocol (NCIP). This message is sent to the NCIP server which parses the message and performs the necessary procedures on the Voyager Circulation server. Voyager Circulation responds with the appropriate NCIP messages, indicating success or detailing processing or messaging errors. Figure 4.10, "Interaction between the ILL Module and Voyager" (page 4–18) shows the interaction between the ILL Module and Voyager, when the records are created and the hold is placed.
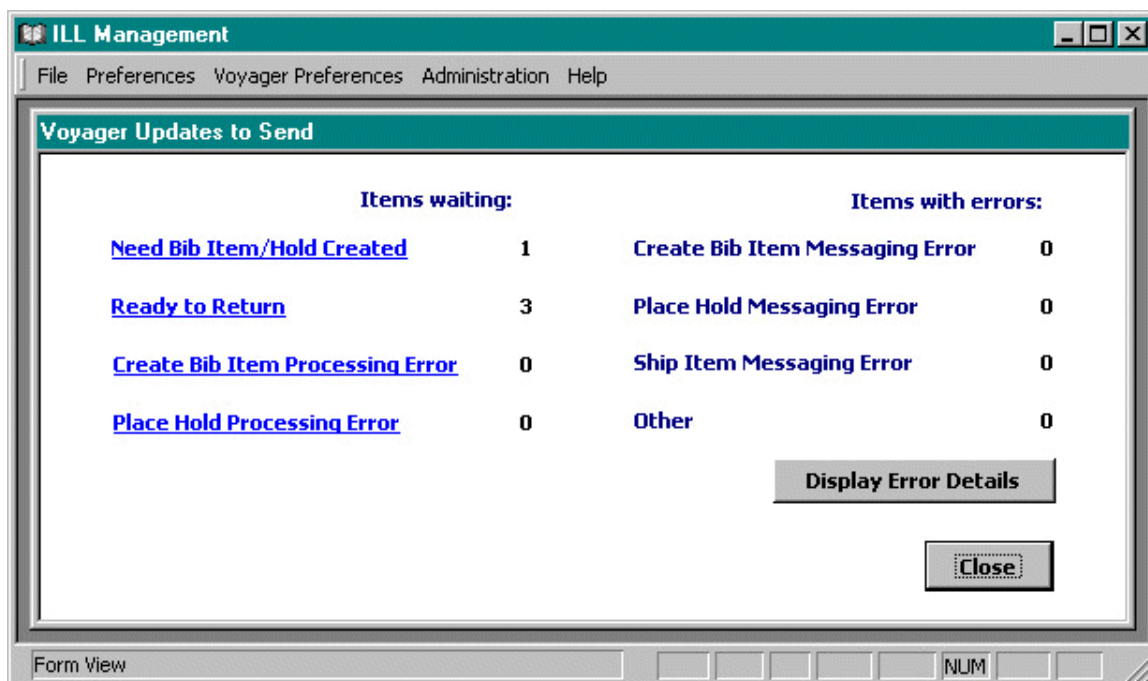
For more information on updating the Voyager Circulation module from the Borrowing section of ILL Management, see the Send Circ Updates to Voyager section in the Borrowing chapter.

4.4.1.1.2. Checking Statuses

A major benefit of Voyager's ILL Module is that it allows a patron to track the status of a particular ILL request in real time. When a patron with an ILL request accesses their patron information page in WebVoyáge, the OPAC server queries the ILL Database through the ILL Status Server (see Section 4.5, "How the ILL Status Server Functions" (page 4–18)) and the status of the request is displayed on the Patron Information page in WebVoyáge.

The Patron ID, as assigned in Voyager's Circulation module, is used as the unique identifier for each request, and is required not only to place a request, but also to display the status of the request in the patron's record.

4.4.2. ILL Module to WebVoyáge

To view the status of an interlibrary loan request, the interaction between the ILL Module and Voyager is as follows. See Figure 4.10, "Interaction between the ILL Module and Voyager" (page 4–18) for a visual illustration of this process.

1. A lending institution sends its reply to the ILL request either directly to the borrowing institution or to OCLC, who passes the reply on to the borrowing institution. The status information is processed and resides in the ILL Database. ILL operators can also manually update requests.

2. Patrons log in to WebVoyáge.

3. The OPAC server queries the ILL Status Server for status information. The ILL Status Server queries the ILL Database. The ILL Database returns the current status of the requested item.

4. The request status information displays on the My Account page in WebVoyáge.
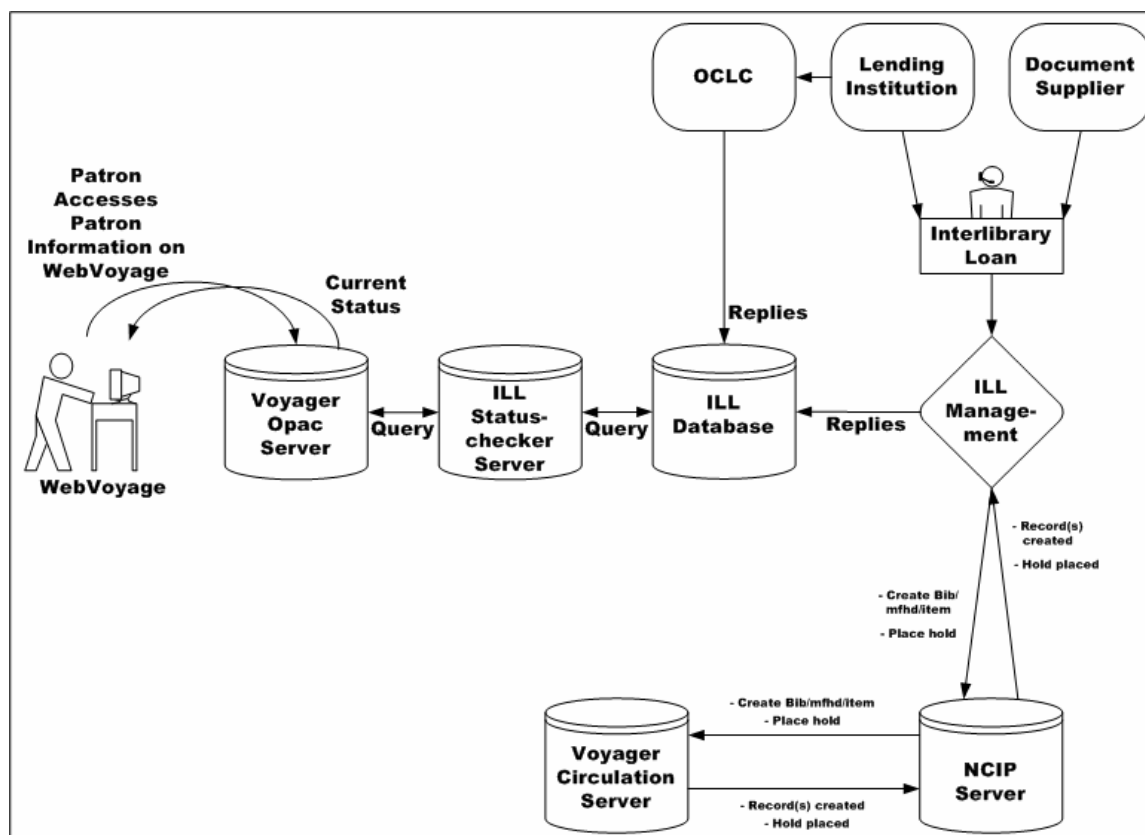
Figure 4.10. Interaction between the ILL Module and Voyager

4.5. How the ILL Status Server Functions

Pending interlibrary loan requests can be updated (by direct communication to OCLC) to reflect the current status of the request such as received, unfilled, and conditional.

When a patron wants to check the status of their interlibrary loan request, the status information must be pulled from the request information in the ILL Database and displayed on the My Account page of WebVoyáge.

The ILL Status Server is the software that monitors/waits for a patron to check his patron record, retrieves the status of the request, and sends it to the OPAC server to display in WebVoyáge.

ILL Status Server retrieves the following status information:

• For photocopy requests (Example: ILL Photocopy Request)

  - All pending requests

- All requests updated to Received Copy or Yes Received since the cut-off date

- All requests updated to Unfilled or Cancelled since the cut-off date

• For loan requests, for example, ILL Loan Request:

- All pending requests

- All requests updated to Unfilled or Cancelled since the cut-off date

- No received requests

Once ILL Status Server retrieves the status of the request, it displays the information in WebVoyáge.

4.6. Interlibrary Loan Requests WebVoyáge Display

Interlibrary loan information displays in two different places on the Patron Information page of WebVoyáge:

• The Requests Pending section

• The Items Available section

All requests with a status of Pending, Unfilled, and Cancelled displays in the Requests Pending section. The Type column indicates either ILL Loan or ILL Photocopy. The Item column displays the title and author (for a loan request) or article title and article author (for a photocopy request). The date the item was requested and the status of the item also displays.

Requests for photocopies, for example, items that are not required to be returned to the lending institution, move from the Requests Pending section to the Items Available section as soon as the request is updated to Received in ILL Management. The specified pick-up location also displays.

4.6.1. Request Forms

There is a Voyager System Administration module configuration required in order for patrons to use an interlibrary loan request form through WebVoyáge and to check the status of their interlibrary loan request through WebVoyáge.

The OPAC Configuration - Request Forms options provide the capability to create, edit, and delete forms that display in WebVoyáge when the patron has logged in. In general, these forms fall into one of two categories.

• Forms that perform traditional functions provided with the Voyager system and require little or no change such as hold, recall, or short loan.

• Library-defined forms that allow for more customizing to include email addresses and field specifications.

For all of the patron's active patron groups, a list of available forms is returned to the WebVoyáge client. Through OPAC Configuration - Request Forms, you determine which patron groups and databases see the form(s) that are available through the system.

Voyager System Administration OPAC Configuration provides the following Form Types from which to select when creating and/or editing forms:

• ARTEmail Loan Form

- ARTEmail Photocopy Form

- Bib Level Form

- Blank Form

- ILL Blank Loan Request

- ILL Blank Photo Request

- ILL Loan Request

- ILL Photocopy Request

- Index New Zealand Form

- Item Level Form

- System Form

- VDX ILL Form

4.6.1.1. Form Configuration Options

The OPAC Configuration options dynamically change with the Form Type selected and are displayed on tabs labeled as follows.

- Select Form

- Databases

- Patron Groups

- Fields

- ARTEmail

See Figure 4.11, "Request Forms tab options example" (page 4–21) for an example of the tab options available with the ILL Loan Request Form Type.
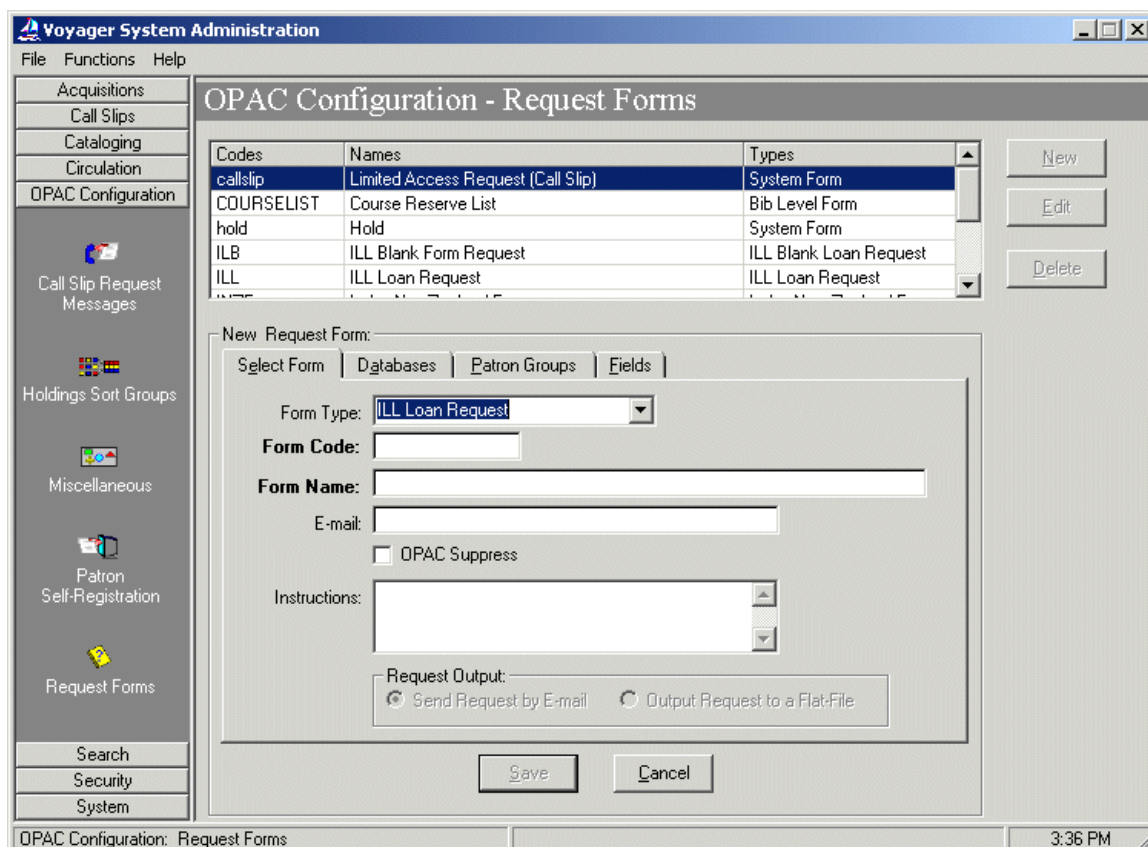
Figure 4.11. Request Forms tab options example

Note

Since some or all of these options are available in all request types, the options are detailed in this section. Request-type specific information about these options are detailed in each individual request type's description.

Procedure 4.5. Adding or Editing Request Forms

Use the following to add or edit a Request form:

1. Click the New button and select the form type if you are creating a new form, or select and existing form and click the Edit button.

    ### Result

    The Edit or New Request Form dialog box displays. See Figure 4.12, "Select Form Tab and Dialog Box" (page 4–22).

2. Follow the instructions for each tab the selected request contains. The instructions for editing the tabs can be found in the sections detailing the individual tabs.

The **Select Form** tab contains basic information about the form. Figure 4.12, "Select Form Tab and Dialog Box" (page 4–22) shows the**Select Form** tab.

Table 4.3. Select Form Tab Components

Component	Description
Form Code	Specifies a unique identifying code for each form.
Form Name	Displays in WebVoyáge as the selection choice and as the subject of the email such as Inter-Library Loan Request.
E-mail	Identifies email address where the request is sent. It must be a full email address (dedicated POP3) such as JohnM@nnnnet.com.
OPAC Suppress	Suppresses form in WebVoyáge if you select this option. Clear it if you want the form to display in WebVoyáge.
Instructions	Displays any instructional text on the form that you enter here. It displays at the top of the request form exactly as it is entered.
Request Output	Indicates whether the request is sent in the form of an email or output to a file. These buttons are purely informational.

Figure 4.12. Select Form Tab and Dialog Box

The Databases tab contains the databases (by database name as entered into Database Definitions) available for selection. Only when connected to the databases selected on this tab is the form available in WebVoyáge.

If you do not include at least one database in the Selected Databases list box, the request form will not be available to anyone. Figure 4.13, "Databases Tab and List Boxes" (page 4–23) shows the Databases tab.
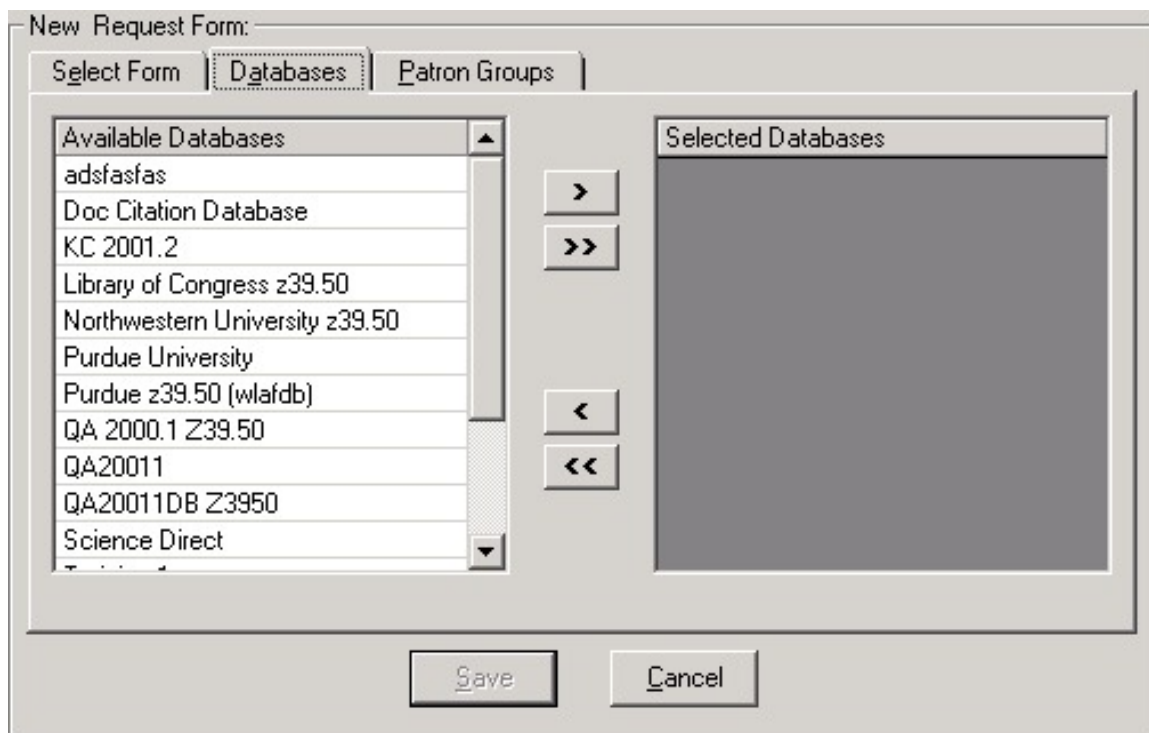

Figure 4.13. Databases Tab and List Boxes

Procedure 4.6. Editing the Databases tab

Use the following to edit the selections in the Databases tab of a form:

1. Add or remove databases using the >, >>, < and << buttons.

    - To add a database, highlight the database in the Available Databases list and click the > button to add it to the Selected Databases list.

    - You can add all of the available databases to the Selected Databases list by clicking the >> button.

    - To remove a database from the Selected Databases list, highlight the database and click the < button. The database moves back to the Available Databases list.

    - To remove all databases from the Selected Databases list, click the << button. All of the selected databases move back to the Available Databases list.

2. The Save button saves your information. The Cancel button closes the dialog box without saving.

The Patron Groups tab contains the patron groups (by patron group name as entered into Patron Groups) available for selection. Only patron groups selected on this tab have access to the form.

If you do not include at least one patron group in the Selected Patron list box, the request form will not be available to anyone.Figure 4.14, "Patron Groups Tab and List Boxes" (page 4–24) shows the Patron Groups tab.
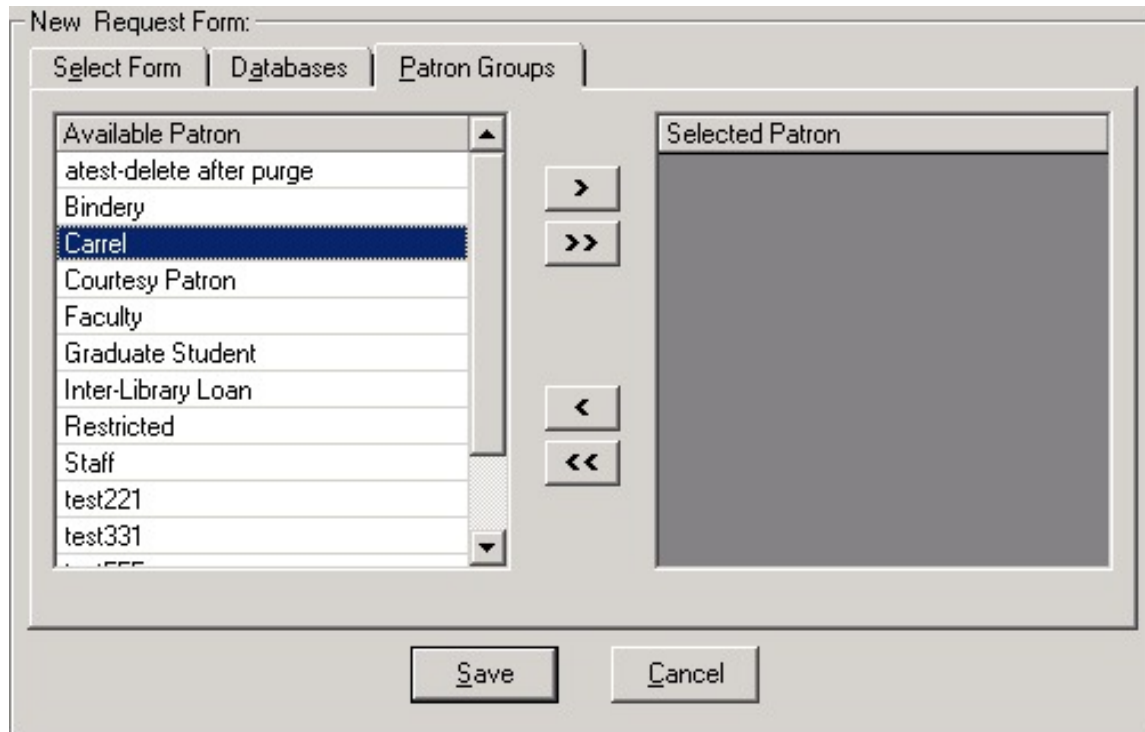

Figure 4.14. Patron Groups Tab and List Boxes

Procedure 4.7. Editing the Patron Groups tab

Use the following to edit the selections in the Patron Groups tab of a form:

1. Add or remove patron groups using the >, >>, < and << buttons.

    *   To add a patron group, highlight the patron group in the Available Patron list and click the > button to add it to the Selected Patron list.

    *   You can add all of the available patron groups to the Selected Patron list by clicking the >> button.

    *   To remove a patron group from the Selected Patron list, highlight the patron group and click the < button. The patron group moves back to the Available Patron list.

    *   To remove all patron group from the Selected Patron list, click the << button. All of the selected patron groups move back to the Available Patron list.

2. The Save button saves your information. The Cancel button closes the dialog box without saving.

The Fields tab (see Figure 4.15, "Fields Tab and Dialog Box" (page 4–25)) contains field mapping, labeling, display, and requirement options.
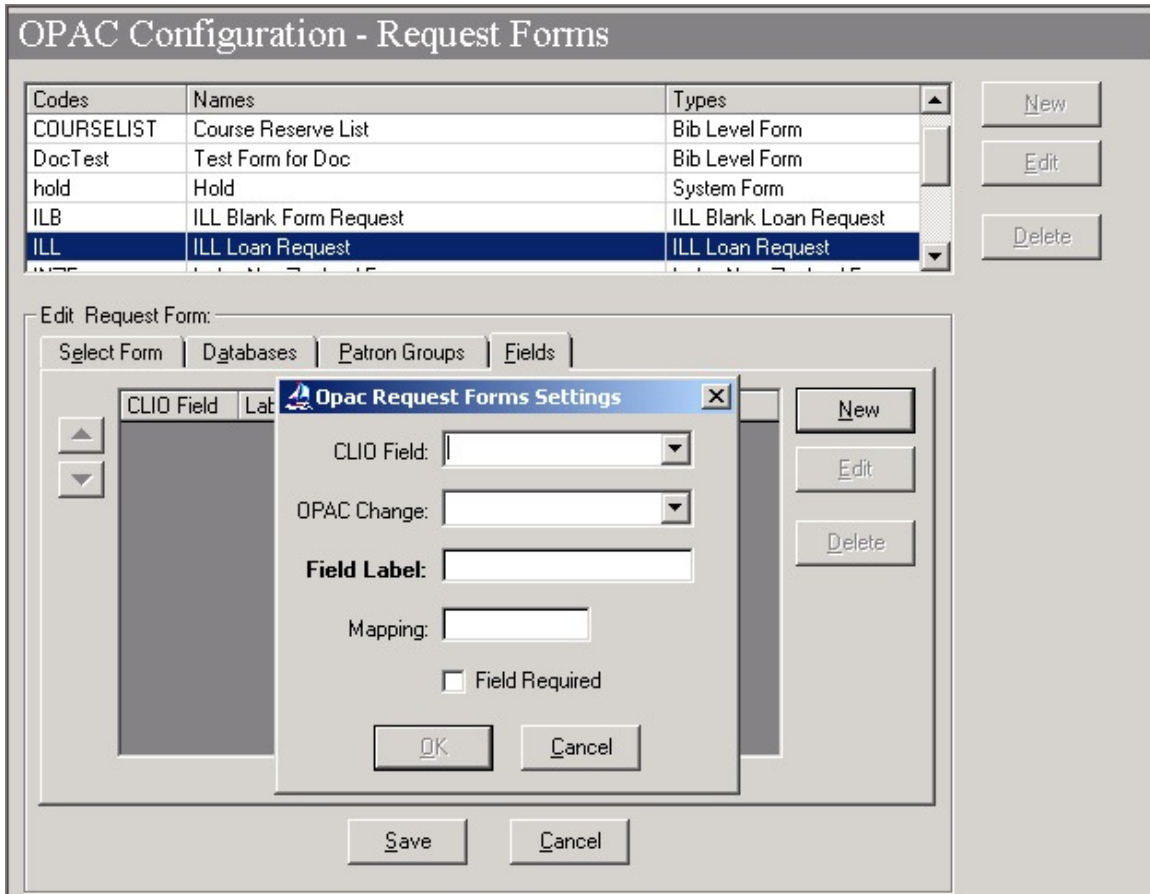

Figure 4.15. Fields Tab and Dialog Box

Table 4.4, "Fields Tab Components" (page 4–25) details the Fields dialog box fields.

Table 4.4. Fields Tab Components

Component	Description
Clio Field	For ILL requests, specifies the Voyager ILL field to which the field corresponds.
OPAC Change	Determine the display and edit availability options for field. No Entry/No Display: Field is not editable and does not display on the request form. Information is simply mapped from a record (patron, item, and so on). No Entry/Display: Field is not editable but the information does display on the request form

Component	Description
	Editable: Field displays on form and is editable.
	If you select Editable and the field also contains a mapping, the information mapped may be overridden on request form.
Field Label	Label of the field on the request form in WebVoyáge.This can be any combination of characters up to 20 characters. You cannot leave the label field blank.
mapping	MARC record field or special code (from Table 4.6, "Field Mapping Codes" (page 4–28)) source from which to map to the request field. Voyager retrieves the information from the appropriate place in the record and include it in the field.
	The Mapping field allows you to map bibliographic and citation tags, patron information from the Voyager patron database, and database information to the request form.
	If no mapping entered, the field is free form text entry.
Field Required	Select this check box to make the field required. Patrons are unable to submit the request until all required fields are filled in. If the field is required, its label is in bold font on the request form.

Table 4.5, "Clio Field Descriptions " (page 4–26) details the Clio Field variables.

Table 4.5. Clio Field Descriptions

Clio Field	Description
Patron	The patron's name
Department	The patron's department. This information is not pulled from the patron's Voyager record. If you add this field to an ILL request form, you should make it an editable field so the patron can add the information to the form. This field can be used to verify patrons in OCLC profiles.
Status	The status of the patron (not the patron's barcode status). This information is not pulled from the Voyager patron record. If you add this field to an ILL request form, you should make it an editable field so the patron can add the information to the form. This field can be used to verify patrons in OCLC profiles. You may want to include the possible status values available to them.
Address	The patron's address
Email	The patron's e-mail address
Fax	The patron's fax number
Phone	The patron's telephone number
Request Type	Hard coded, auto-fill

Clio Field	Description
Title	The title of the item requested
Author	The author of the item requested
Imprint	The imprint of the item requested
Edition	The edition of the item requested
Article Title	The title of the journal article requested
Article Author	The author of the journal article requested
Volume	The volume of the journal article requested
Number	The number of the volume of the journal article requested
Date	The date of the volume of the journal article requested
Pages	The page number(s) of the journal article requested
Verified	The source in which the item information was verified. The Verified tag represents the source (database, index, and so on) in which the item or journal article was found. This field could also include the name or initials of the person who verified the bibliographic or citation information. If you add the Verified tag to the request form in order to pull database information into the form, you must fill in the Mapping field with the code 5000. This is the same code used in the display configuration files so that database information displays in WebVoyáge.
ISBN/ISSN	The ISBN number (for an item) or the ISSN number (for a journal)
Series	The series of the item requested
Call Numbers	The call number(s) of the item requested
OCLC Number	The OCLC number of the item requested
Publisher	The publisher of the item requested
Place of Publication	The place of publication of the item requested
Publication Date	The publication date of the item requested
Need by	The date by which the patron requires the loan or photocopy. You can also set default information for this field in ILL Request.
Maximum Cost	The maximum amount the patron is willing to pay for the loan or photocopy. You can also set default information for this field in ILL Request.
Pick up at	The pick-up location drop-down list (all "happening" locations defined in Voyager System Administration) automatically displays on a request form. You do not have to add it when adding or editing fields.
Notes	Any additional borrowing notes. You can also set default information for this field in ILL Request.

Configuring the Status Server (page 4–2) lists the non-MARC record Field Mapping codes

Table 4.6. Field Mapping Codes

Clio Field	Possible Label	Mapping Code
Patron	Patron Name	P509
Address	StreetAddress1	P510
Address	StreetAddress2	P511
Address	StreetAddress3	P512
Address	StreetAddress4	P513
Address	StreetAddress5	P514
Address	City	P515
Address	State	P516
Address	Zip Code	P517
Address	Country	P518
Phone	Telephone	P519
Email	E-Mail Address	P527
Fax	Fax Number	P528

Considerations for mapping patron information are as follows:

Think about how many lines of address information are contained in a typical patron record. You can include all five address lines (for example, P510 to P514) on the request form. However, if a patron has only a street address and a box number in their patron record and you add all five street address fields (P510-P514), the system fills in the first two lines of the request form and leaves the other three blank.

If the patron record includes a valid Temporary address (for example, the effective dates include the current date and the Hold check box is not selected), the system uses that address.

If the Temporary address is not valid, the patron's permanent address is used (if the Hold check box is not selected).

Voyager selects and adds a patron address to a request form in the same manner that it selects a patron address for a circulation notice. For an expanded explanation of the process, see the Voyager Circulation User's Guide.

Remember that the information must be included in the patron record for the system to populate those fields of the request form. If you include an e-mail field on the request form but the patron record does not include an e-mail address, the field is blank on the WebVoyáge request form

When you add a field to the request form, if you do not map it to a MARC or patron tag and select Editable from the OPAC Change list, the field displays on the WebVoyáge ILL request form as a blank field (Figure 4.16, "Fields tab" (page 4–29)).
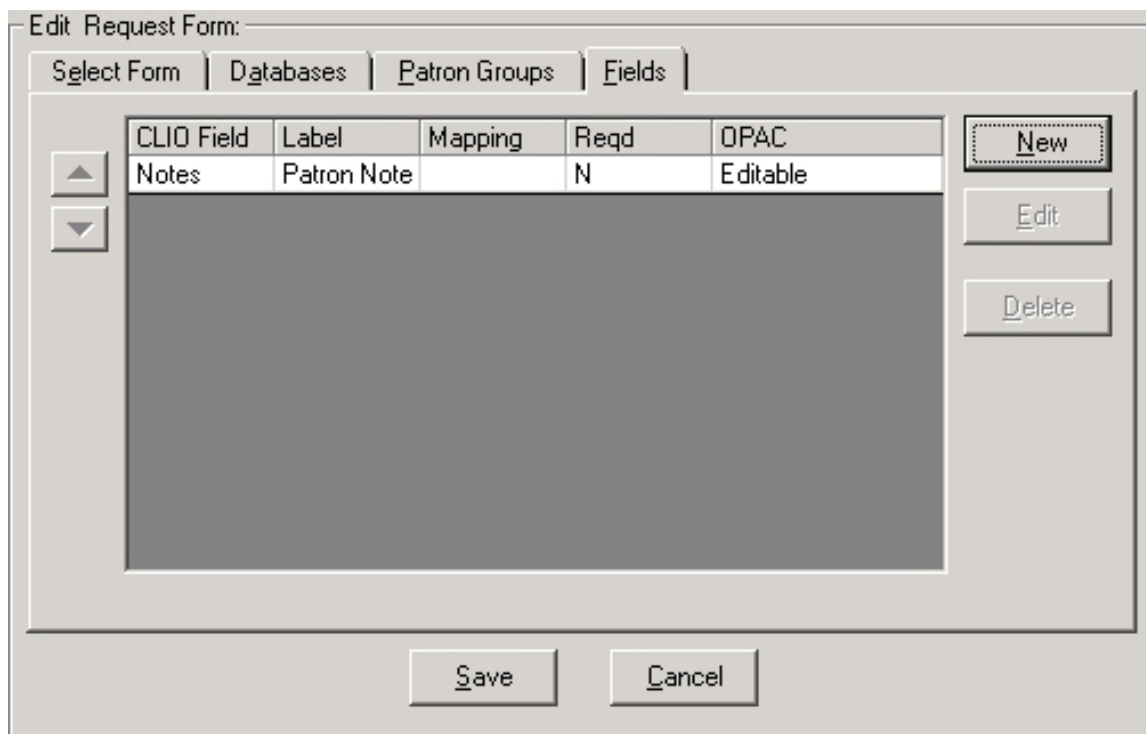
Figure 4.16. Fields tab

For example, adding the Notes field to an ILL request form as displayed in Figure 4.16, "Fields tab" (page 4–29), results in the following display on the WebVoyáge ILL request form (Figure 4.17, "WebVoyáge ILL request form - Patron Notes field" (page 4–29)):

Figure 4.17. WebVoyáge ILL request form - Patron Notes field

When you add a field to a request form, map the field to a bibliographic or patron tag, and choose No Edit, No Display from the OPAC Change list, the field does not appear on the WebVoyáge ILL request form, but the information does display in the request when viewed from ILL Request or ILL Management.

CLIO Field	Label	Mapping	Field Reqd	OPAC Change
Patron	Patron	P509	Y	Editable
Phone	Phone Number	P519	N	Editable
Email	Email	P527	Y	Editable
Title	Title	245a	N	No Edit / Display
Author	Author	100a	N	No Edit / Display
ISBN_ISSN	ISBN Number	020A	N	No Edit / No Display
Verified	Found this here	5000	N	No Edit / Display

Figure 4.18. OPAC Request Forms dialog box - Fields tab

For example, adding patron fields to an ILL request form as displayed in Figure 4.18, "OPAC Request Forms dialog box - Fields tab" (page 4–30) and choosing No Edit, No Display from the OPAC Change list would result in no patron fields on the WebVoyáge ILL request form. However, because the patron fields are mapped to pull the information from the Voyager patron database, the patron name, address, telephone, and e-mail address information is added to the request and display when viewed from ILL Request or ILL Management.

Currently, the ILL Module formats the patron address information into one string of data which is forwarded to the mediating agency or lending institution. If you add more than one address line to a request form, it pulls the patron's address information from their patron record and fills in each address line on the request form. However, when you view the patron address on the request in the ILL Module, it looks like this:

```
Address: 2200 E. Devon Address: Suite 382 Address: Des Plaines Address:
IL Address: 60018
```

If you are creating ILL requests to be sent on to OCLC, you must include either an ISBN or OCLC field. One or the other is required before you can send the request from the ILL module to OCLC.

If you created an ILL request form with all the fields defined as in Figure 4.18, "OPAC Request Forms dialog box - Fields tab" (page 4–30) above, the form would display in WebVoyáge as in Figure 4.19, "Sample ILL Loan form in WebVoyáge" (page 4–31).

Figure 4.19. Sample ILL Loan form in WebVoyáge

Figure 4.20, "The ARTEmail tab" (page 4–32) shows the ARTEmail tab.

Figure 4.20. The ARTEmail tab

The ARTEmail tab contains information specific to ARTEmail account configuration (see Table 4.7, "ARTEmail Tab Components" (page 4–32)).

Table 4.7. ARTEmail Tab Components

Component	Description
ARTEmail Login	Login for your ARTEmail account.
ARTEmail Password	Password for your ARTEmail account.
ARTEmail Voucher Range	
Prefix	ARTE-mail system E-mail prefix issued to your institution
Start	Starting number of the allotted block of messages
End	Ending number of the allotted block of messages
Last Used	Displays the message number that was last used to send a message

4.6.2. ILL Form Types

The ILL form types listed in Table 4.8, "ILL Request Form Types " (page 4–33) are selectable from the Form Type drop-down on the Select Form tab when creating a form. These form types have different purposes and options available when creating or editing them. Table 4.8, "ILL Request Form Types " (page 4–?) provides a description of these forms.

For a more comprehensive list of available form types, see the Voyager System Administration User's Guide.

Table 4.8. ILL Request Form Types

Form Type	Description	Notes
ARTEmail Loan	Loan request to The British Library	Request sent as structured email, based on automatic mapping of information according to British Library requirements.
ARTEmail Photocopy	Photocopy request to The British Library.	Request sent as structured email, based on automatic mapping of information according to British Library requirements.
ILL Blank Loan Request	Inter Library Loan request not requiring any specific record information to be available to Voyager to submit request	
ILL Blank Photocopy Request	Inter-Library Photocopy request not requiring any specific record information to be available to Voyager to submit request	
ILL Loan Request	Inter-Library Loan request	
ILL Photocopy Request	Inter-Library Photocopy request	
Index New Zealand	Index New Zealand loan request	
VDX ILL	Structured email request to interact with VDX (Virtual Document eXchange).	VDX requests are sent in the form of a structured email. The requisite fields are automatically mapped by Voyager.

Some components of the request forms (such as a label for the comment field) are configured in WebVoyáge. Refer to the *WebVoyáge Basic User's Guide* and the *WebVoyage Architecture Overview and Configuration Models* guide.

4.6.2.1. ARTEmail requests

The ARTE-mail Loan Form and the ARTE-mail Photocopy Form are used to create an ARTTel-compatible structured E-mail message that can be sent to The British Library. The information that The British Library requires is automatically included in the email by Voyager.

- The ARTE-mail Loan Form delivers three specific types of information: Volume, Part, and Year.

- The Photocopy Form delivers six different pieces of information: Volume, Part, Year, Article Title, Article Author, and Pages.

You can enter unique login, password, and voucher information for each E-mail form that you create. This request can only be made for a specific item. The form is user defined and can only be delivered by email to the address you specify.

See Table 4.9, "ARTEmail Loan versus ARTEmail Photocopy" (page 4–33) for details regarding the difference between ILL ARTEmail Loan and Photocopy.

Table 4.9. ARTEmail Loan versus ARTEmail Photocopy

ILL ARTEmail Loan	ILL ARTEmail Photocopy
Author	Article Author

ILL ARTEmail Loan	ILL ARTEmail Photocopy
Title	Article Title
Place of Publication	Journal Title
Publisher	Pages
Year	Year
Volume	Volume
Edition	Part

4.6.2.1.1. ARTE-mail Request Export File

In addition to being e-mailed, the ARTE-mail forms are also written to a file on the server which can be copied to other systems and imported into another database.

Each form that is created generates its own export file. While the e-mail message is delivered as soon as the request is submitted, the requests are not transferred to a file until the proper batch job is run. Circjob #26, Export OPAC Requests must be run in order to transfer the records from the database to the file. Once transferred, the records are deleted from the database. See the *Voyager Technical User's Guide* for information regarding how to run this batch job.

The format in which the requests are to be exported can be customized. The template can be found on the server in the /ini/ directory and is called opacrequest.ini. This template can be customized so that the information can be stored in any format. You can specify which fields are to be saved and how.

After the export, the information is saved as a text file called opacrequest.<form code>.out, where <form code> is the code defined in the Request Forms dialog box. For example, the export file created for your ILL E-Mail Loan Request form with a form code of ILL_LOAN is named opacrequest.ILL_LOAN.out. Each item level form created in WebVoyáge has its own file to which it saves information. This file is placed in the /rpt sub-directory on the server.

4.6.2.2. ILL Loan request and ILL Photocopy Request

ILL Loan Requests are requests that have an actual item going to the patron. ILL Photocopy requests consist of something that does not need to be returned (like a photocopy of an article).

Use the field mapping to have Voyager automatically include as much information from the various records in the request. Use non-mapped editable (user-entry) fields to obtain additional information (or to verify record information) from the patron making the request.

4.6.2.3. Blank ILL Loan and Blank ILL Photocopy Requests

These forms are similar to the ILL Loan and ILL Photocopy requests, except that the information is entered by the patron, and not mapped from the record(s). Include user-entry fields on these forms, so the patron making the request can enter the information from whatever source they have. Do this by making the fields Editable.

4.6.2.4. VDX requests

Voyager ILL includes interoperability with VDX (Virtual Document eXchange). VDX requests are sent in the form of a structured email. The requisite fields are automatically mapped by Voyager.

You can include the Client ID field on the Fields tab in Voyager System Administration if you want the Patron to include his/her name on the request.

The Voyager user ID of the patron making the request must match the user ID in VDX.

4.6.2.5. Index New Zealand Form

Index New Zealand Form requests are used to transmit ILL request information through a VDX-compatible structured E-mail message. You may have only one form of this type defined in Voyager System Administration.

The Index New Zealand Form delivers information on the Client Name (the name of the person submitting the request) and any note information. This request can only be made for a specific item. The labels on each of the forms can be defined in the System Administration module. The forms can only be delivered by E-mail to the address you specify.

4.7. Additional System Administration Setup

Table 4.10, "ILL Module Setup in System Administration" (page 4–35) addresses various pieces of the Voyager System Administration module that you might consider adding or changing for interlibrary loan purposes. For more information on these components, see the Voyager System Administration User's Guide.Table 4.10, "ILL Module Setup in System Administration" (page 4–35) includes the System Administration application, a brief description of its use with interlibrary loan, and a cross-reference to the section(s) of the Voyager System Administration User's Guide. You can remove these pages and use them as a check list with the Voyager System Administration User's Guide.Table 4.10, "ILL Module Setup in System Administration" (page 4–35) references the Voyager System Administration User's Guide.

Table 4.10. ILL Module Setup in System Administration

System Administration Applications	Brief Explanation of use with Interlibrary Loan
System>Locations	Create a new ILL location. Connected to Circulation Policies and Security.
System>Print Locations	Create a new ILL print location. Connected to Circulation Policies and printing Circulation notices. (optional)
Circulation> Patron Groups	Create a patron group for institutions to whom you lend items. Connected to Circulation transactions such as charging, discharging. Allows you to keep circulation statistics for the borrowing institution.
System>Item Types	Create an item type for ILL items. This is used for items borrowed from other institutions for your patrons.
Circulation> Calendars	Create an ILL calendar if you want ILL items to follow a calendar (open, closed, hours, exceptions dates) separate from your main calendar. (optional)
System>Fines/Fees	Create Fine/Fee Reasons and/or Payment Types for ILL items.
OPAC Configuration>Request Forms	Create ILL request forms.
OPAC Configuration>Miscellaneous	Set Cut-off date. See the Voyager System Administration User's Guide.
Circulation> Policy Definitions	Create a new policy group for ILL items. On Locations tab, select location and make it the "happening" location. Check the "OPAC Suppress for Items on the Fly" check box. Select default Print Location. Select appropriate calendar on Calendars tab. Set intervals for ILL items on Intervals tab. If you created a Patron Group for borrowing institutions, set Patron Group definitions. If you created an ILL item type, set a replacement cost on the Item tab.
Circulation> Policy Definitions	Create separate loan period, grace period, fine amount, fine interval, etc., combinations for your patron groups (for example, faculty, graduate student, etc.) and the ILL item type. if you set Loan Period to zero then you are forced to manually input a due date at the time the ILL item is charged to the patron.

System Administration Applications	Brief Explanation of use with Interlibrary Loan
Security>Operator Profiles	Add any ILL operators who need access to the Circulation or Cataloging module for interlibrary loan purposes.
Security>Master Profiles	If you created an ILL location, add the ILL location to the Backup Administrator profile
Security> Circulation Profiles	You create new profiles or use existing Circ profiles. Add ILL operators to a profile on the Operators tab. Set the level of access for the profile(s) on the Profile Values tab. Include the new ILL location on the Locations tab. (required for NCIP)
Security> Cataloging Profiles	If you want ILL operators to create/edit/delete brief record for an ILL item in the Cataloging module, create new profiles or use existing Cat profiles. Add ILL operators to a profile on the Operators tab. Set the level of access for the profile(s) on the Profile Values tab. Include the new ILL location on the Locations tab. (required for NCIP)

4.8. Voyager Circulation Activities for the Interlibrary Loan Process

Table 4.11, "Circulation Functions Related to Interlibrary Loan" (page 4–36) addresses various pieces of the Circulation module that you might consider reviewing for interlibrary loan purposes. The Voyager Circulation User's Guide does an excellent job of explaining all these pieces. The table includes the Circulation application, a brief description of its use with interlibrary loan, and a cross-reference to the section/pages of the Voyager Circulation User's Guide. You can remove these pages and use them as a check list with the Voyager Circulation User's Guide.

This table references the Voyager Circulation User's Guide.

Table 4.11. Circulation Functions Related to Interlibrary Loan

Circulation Applications	Brief Explanation of use with Interlibrary Loan
Creating Patron Records	Editing existing patron records.
Creating brief bib, holdings, and item records	Creating records for an interlibrary loan item when it is received. You can create the records in the Circulation or Cataloging module. You might want to create an ILL template for ILL records. If you create an ILL location in System Administration, you can select that location for the holdings record. Tip: You might want to add "ILLloan" or some other unique wording to each record so you can perform a keyword search for all ILL items in your Voyager database. You can include the unique identifier in any ILL templates you create in Cataloging or Circulation for ILL items.
Fines and Fees	Adding/posting ILL fines or charges to a patron record.

There are other Voyager modules that you can utilize and configure to fully integrate the ILL Module with Voyager. Table 4.12, "Additional Considerations for ILL Configuration" (page 4–37) addresses various pieces of these modules that you might consider reviewing for interlibrary loan purposes. The table lists the Voyager module, a brief description of its use with interlibrary loan, and a cross-reference to the applicable user's guide. You can remove these pages and use them as a check list with the Voyager Circulation User's Guide.

Table 4.12. Additional Considerations for ILL Configuration

Voyager Module	Additional Considerations
Reporter	To print reports and notices, like "Items Available" or "Recalls" you must create files by running Circulation jobs and then printing the notices.
WebVoyáge	You can customize the patron information page in WebVoyáge. If you are adding bibliographic or citation databases for simultaneous searching, you must set up connections to those databases. You can also customize WebVoyáge displays for the individual databases.

Chapter 5. ARTEmail Operating Instructions

5.1. ARTEmail Overview

The ILL Module includes features to allow users to effectively manage ILL requests submitted to the British Library using the ARTEmail system. These features include the following:

- Sending requests to the British Library

- Receiving and decoding acknowledgements and responses from the British Library using the Replies Intray

- Sending updates or queries to the patron using email

- Sending responses to the British Library

- Ability to handle multiple British Library accounts

- A History Log that supplies a complete record of all communications for each request

All of these features are integrated into the Voyager ILL Module.

The ILL Module is composed of the following three components:

- ILL Request

- ILL Management

- ARTEmail communications

5.1.1. ILL Request

ILL Request is used to:

- Receive patron requests from your library web submission form

- Manually enter other requests received from the patron

- Check the local OPAC to determine if the item is held locally

- Send queries or other responses to the patron using email

- Select the appropriate ARTEmail keywords to attach to the request

- Send the request to the British Library

- Store the request in the database

5.1.2. ARTEmail Communications Component

The ARTEmail communications component is used to:

- Receive acknowledgements and responses from the British Library using the Replies Intray

- Decode the replies and update the database

• Transmit responses back to the British Library using email

5.1.3. ILL Management

ILL Management is used to:

• Review the Replies from the British Library

• Send updates or queries to the patron

• Generate responses to be sent to the British Library

5.2. Initial Setup - Changes to Your British Library Accounts

The following two things need to be changed with regard to your existing British Library accounts:

1. You must tell the British Library to use number suppression for all of your accounts. ILL Request assigns request numbers and sends that number to the British Library with each request. The British Library uses that number to communicate with you in any subsequent message.

2. You must tell the British Library that you want to receive responses through the Replies Intray and that you want to receive Shipped messages. The ARTEmail communication component is designed specifically to work with the Replies Intray to receive acknowledgements and responses from the British Library and to automatically process Shipped responses and update the database.

5.3. Initial Setup - Entering British Library Account Information

The ILL Module needs to know certain information about your accounts at the British Library. This information is entered in ILL Request by selecting the Options menu item, Setup BL Accounts (see Figure 5.1, "Setup BL Accounts Dialog Box" (page 5–3)) or in ILL Management by selecting the British Library Preferences item and Setup BL Account Information. This can be set up in either component. The information is shared between all three components.

Figure 5.1. Setup BL Accounts Dialog Box

You can enter the following:

1. A meaningful name for each account

2. Your British Library user ID and password for that account

3. Select ARTEmail as the account type

4. The British Library's email address (usually artemail@art.bl.uk)

5. The email address (Account Email Address) that the British Library uses to send replies to you

   Note

   The Account Email Address is the address to which the British Library sends responses and should be used by ARTEmailComms. The Account Email Address is related to the Email Account Login entry on the Email Setup for ARTEmail dialog box. See Figure 5.9, "My Email Information - Setup" (page 5–11).

In addition, you need to set up some preferences for each account and choose a default account. This can be done by selecting the Setup BL Preferences menu item from the Options menu item ILL Request.

Figure 5.2. BL Preferences

As shown in Figure 5.2, "BL Preferences" (page 5–4), you may set defaults for search level, shipping option, copyright, and holds for each account. You may also select the default account.

5.4. Setting up ILL Request for Ordering Items from the British Library

There is considerable detail about setting up ILL Request in the other parts of the guide that are not repeated here. There are, however, several points to emphasize as follows:

1. Under the Options/General Defaults menu item, you need to select British Library as the default supplier.

2. The Last Transaction ID field should be set to 1 or any convenient value. It is the numeric portion of the request ID that is sent to the British Library and is incremented automatically for each request.

3. The Workstation User ID field should be uniquely assigned to each workstation where ILL Request is installed. This value is applied to the Transaction ID as a prefix to form the request ID for each request. For example, if on a particular workstation the Last Transaction ID is 1000 and the Workstation User ID is ABC, the requests are assigned request IDs ABC1000, ABC1001, ABC1002, and so on. You could use the first two characters of the Workstation User ID to indicate which branch library submitted the request and the third character to uniquely identify the workstation within that library. However, British Library requirements dictate that the letter S not be used as part of the Workstation User ID. Using more than three characters could cause the TX line of the request to exceed the 40-character limit.

5.5. Entering Patron Requests for Ordering Items from the British Library in ILL Request

ILL Request can accept patron requests in two ways:

1. From your library patron request submission web page.

2. By staff manually typing in the request information using a data entry screen provided by ILL Request.

In order to enter a request manually into ILL Request, click Manual Entry from the Main screen. The Review Details dialog box displays. See Figure 5.3, "Review Details Dialog Box" (page 5–5).

Figure 5.3. Review Details Dialog Box

Note

The default values have been set for Supplier, BL Account, Search Level, Shipping, Wait List and Copyright. These values can be changed for any individual request.

Enter as much information as you have about the request and patron by tabbing through the fields on the screen. Entering an email address for the patron is necessary if notices or queries are to be sent to the patron via email. If desired, a pick-up location can be entered in the Patron Notes/Pick up Location field in place of the asterisks following the equal sign.

Set values for Item Type, Search Level, Shipping, Wait List, Microform, Home Reading, Other, and Copyright. Setting these values causes the appropriate ARTEmail keyword(s) to display in the request to the British Library.

Note

If you choose Secure Electronic Delivery as the ShipVia choice, you have the option to have the item delivered directly to the patron.

In addition, you can select one of several Staff ID values to represent the person who is going to work on this request.

At any point during this data entry process, you may check the holdings of your own catalog by clicking the Check Local Holdings button at the bottom of the screen. This performs a Title search on your catalog and shows you the result as shown in Figure 5.4, "Check Holdings Display" (page 5–6).
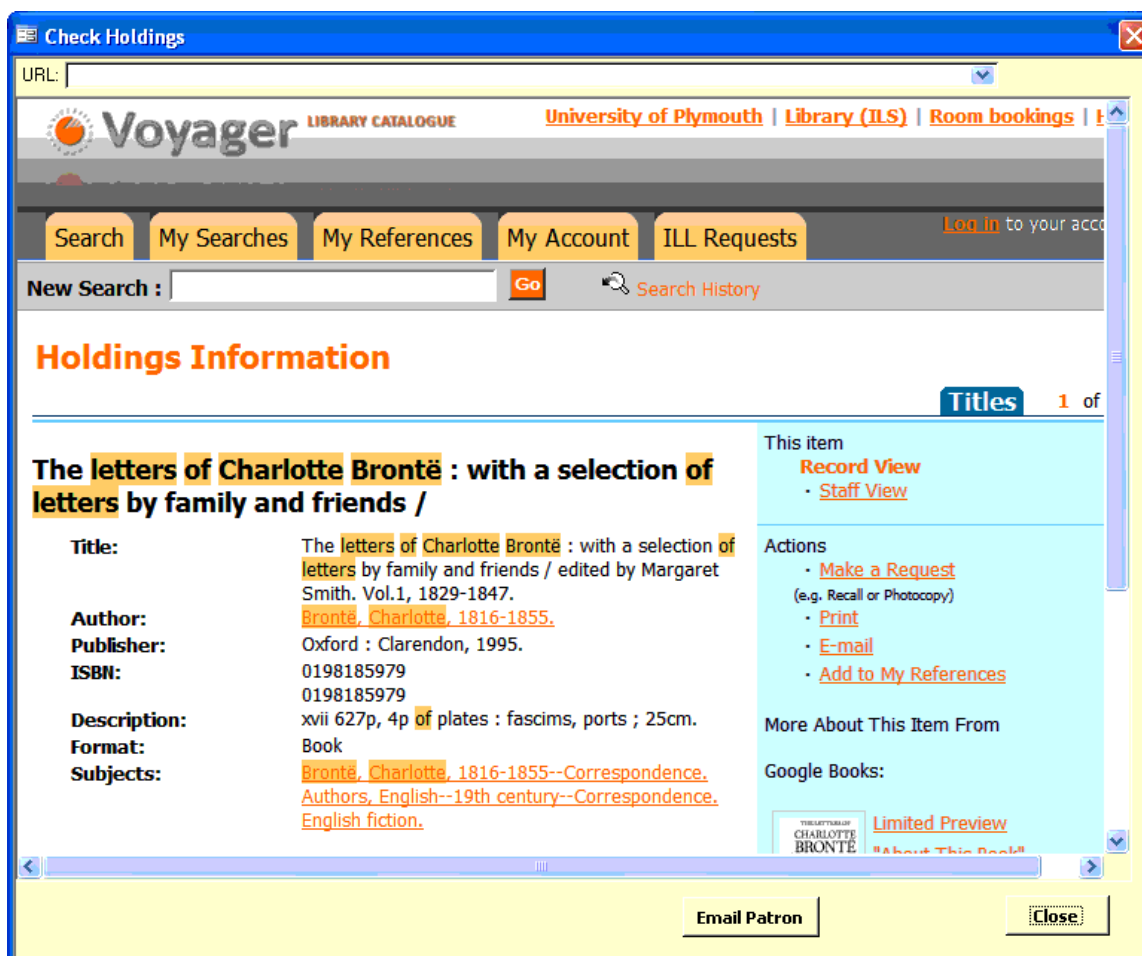
Figure 5.4. Check Holdings Display

In this particular example, the title is held in the local collection. You can send an email notice to the patron by clicking the Email Patron button. Patron Email (see Figure 5.5, "Patron Email" (page 5–7)) displays.

Figure 5.5. Patron Email

The email address is taken from the value entered on the request data entry screen. Clicking the Send button causes the email to be sent. The text of the email message may be edited prior to the transmission.

Assuming that the item is not held locally, return to the data entry screen (See Figure 5.3, "Review Details Dialog Box" (page 5–5)) and complete filling in information concerning the request and then click Next Record to enter data concerning another request or click Close to return to the Main screen.

5.6. Final Review/Transmission to the British Library for Ordering Items in ILL Request

After a batch of requests has been entered, they may be reviewed and/or sent to the British Library. From the Main screen, click Review Borrowing Request Summary. The Request Summary displays. See Figure 5.6, "Request Summary" (page 5–8).
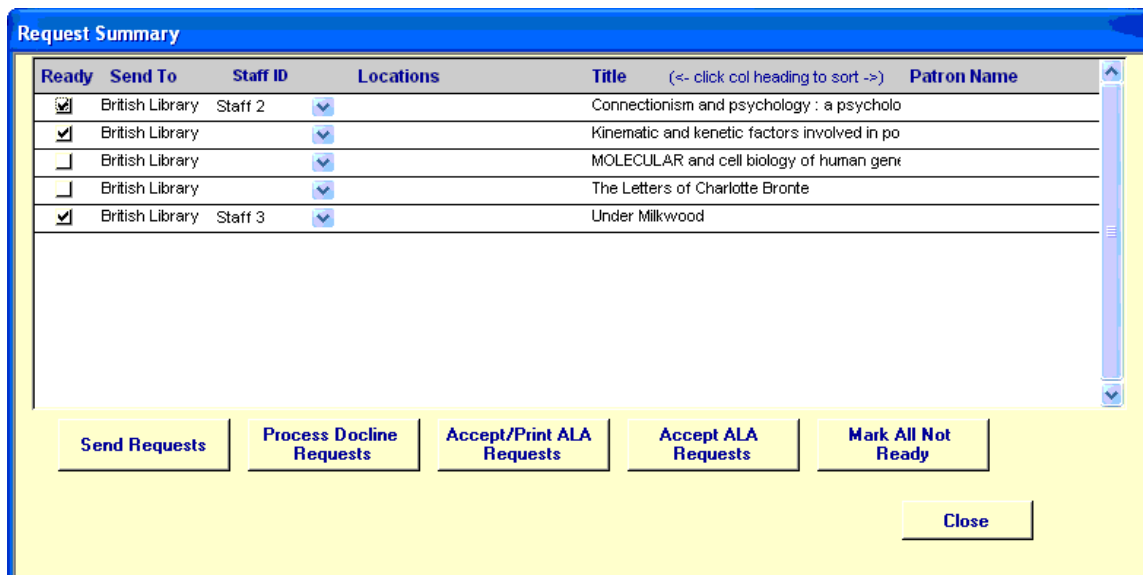
Figure 5.6. Request Summary

This shows a summary of all requests currently waiting to be transmitted to the British Library. The requests may be sorted by title, patron, or Staff ID by clicking the column headings.

You may, at this point, check the boxes under the heading Ready. This indicates that the requests are to be sent to the British Library when the button Send Requests is clicked.

Alternatively, if you want to review the requests, double-click any line and the details screen displays (see Figure 5.7, "Review Details (Previous/Next Buttons)" (page 5–9)). This screen is very similar to the data entry screen seen earlier. The differences are that there are now Previous and Next buttons and a record number indicator in the lower left corner.

Figure 5.7. Review Details (Previous/Next Buttons)

You may edit any field or delete the entire record at this point. When the request is finalized, click the Ready to Send check box.

When you return to the Summary screen and click the Send Requests button, all of the Ready requests are sent to the British Library in the proper ARTEmail format with all required keywords. The Ready requests are added to the Borrowing Requests table and an entry made to an ARTEmail History log in the ILL Module database. These requests are then removed from the ILL Request database. The status of these items in the main ILL Module database are set to Pending. Requests that are not Ready remain in the ILL Request database until they are either sent or deleted.

This completes the process of ordering items from the British Library.

5.7. ILL ARTEmail Communications - Receiving/Processing Responses

The British Library sends several responses to you regarding your requests. These are Acknowledgements and Replies Intray messages. They are all sent to the email address that you have provided to the British Library for each account.

Since ILL Request sends requests one at a time, the British Library sends an Acknowledgement message for each request shortly after the request was sent and received. Replies Intray messages are sent by the British Library on a schedule that you may arrange with them.

It is not necessary for you to manually read or print out these messages. The ARTEmail communications component does this for you. Once you start this component from the desktop icon, you see the Main menu shown in Figure 5.8, "ILL ARTEmail Communications - Main Menu" (page 5–10).
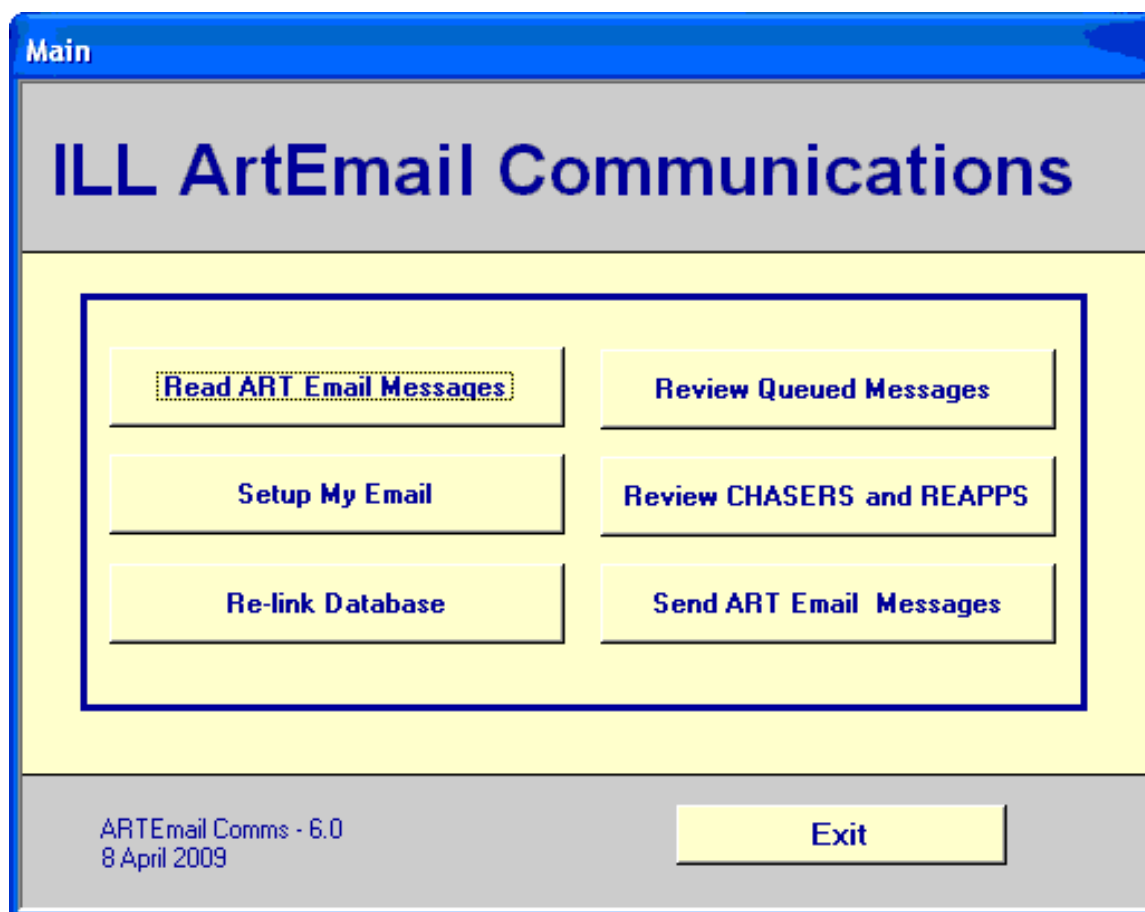
Figure 5.8. ILL ARTEmail Communications - Main Menu

5.8. Setting Up the ILL ARTEmail Communications Module

It is necessary to add your email details to the component. You do this by clicking the SETUP My Email button. The My Email Information dialog box displays. See Figure 5.9, "My Email Information - Setup" (page 5–11).

Figure 5.9. My Email Information - Setup

Fill in the fields as shown. It is important that these values match those provided to the British Library and that the Email Account Login and Password match the email account. It is a good idea to initially set the Delete Mail From Server field to No.

> **Note**
>
> The ARTEmail Communications e-mail addresses are unrelated to the ILL Request e-mail addresses and are usually different e-mail addresses.

5.9. Retrieving Responses with ILL ARTEmail Communications

When you click the Read ARTEmail Messages button, the Communications component queries your mailbox to see if there are any Acknowledgements (Accepts/Rejects) or Replies Intray messages. The component recognizes these messages by means of the Subject line of the message. Other types of messages in the mailbox are ignored and not affected in any way.

If any applicable messages are found, each one is processed and automatically parsed to determine which request the message refers to and what action should be taken.

If an Accept message is received, the status of the request is unchanged. An entry is made to the ARTEmail History log. If a Reject message is received, the status of the record is set to Error and an entry is made to the History log that contains the details concerning the reason for rejection.

A single Replies Intray message normally contains responses for a number of requests. The communications module identifies each request referred to in the message and extracts the BLDSC Reply Code. Based on the value of this code, the status of the record is updated. Based upon a user setting for each code, an email message may be sent to the patron. You may set the text of the email message for each code. A complete listing of each Reply Code, the new status, and an example of the email text is included in a section at the end of this chapter.

Since ILL Management has the ability to send Chasers and Reapps automatically on a date set for each request, the Communications component resets one or the other of these dates if certain Reply Codes have been received. For example, when a request is initially sent to the British Library, a Chaser date is set for

three weeks later. On that date, if no response has been received from the BL, a Chaser is sent. If, in the interim, a Shipped message arrives, the Chaser date is blanked out. Other Reply Codes may simply cause the Chaser date to be reset.

You may alter the actions that are taken when Reply Codes are received. If you go to the British Library Preferences/BL Reply Codes menu item, the screen shown in Figure 5.10, "BL Reply Codes" (page 5–12) displays.

Figure 5.10. BL Reply Codes

The entries on this screen may be edited to alter the behavior of ILL Management in response to specific reply codes.

You may want to run the Communications component to retrieve responses from the British Library several times per day depending on how often you have asked the British Library to send you a Replies Intray message.

5.10. Reviewing the Daily Replies Intray with ILL Management

The previous sections have described how to create and send new requests to the British Library ARTEmail system and how to retrieve the replies from the British Library. This section begins to describe the process of reviewing those replies and reacting to them on a daily basis.

If you click the ARTEmail Items Awaiting Action button from the Main Borrowing screen, Figure 5.11, "ARTEmail In Work" (page 5–13) shown below displays.

Figure 5.11. ARTEmail In Work

The series of buttons on the left permit the user to display information from the History Log and the Borrowing Request table for various categories of requests. The first button displays a summary of the records from the History Log that were received Today. In this example, Today is 15 Dec 2005. The large section in the middle of the top portion of the screen is a scrollable box containing Replies Intray records from the History Log with today's date. Shown is the Request Number assigned by ILL Request when the request was created, date this message was received from the British Library, resulting status of the request, Reply Code received, and the patron's name.

If you click on a particular item in this list, the details of the requests are shown in the box below the summary and the entire History Log for this request is shown to the right of the request details. The History Log is displayed in reverse time order. In this example, you see that the request was submitted on 13 Dec, an ACCEPT message was received on 14 Dec, the Reply (CRF) was received on 15 Dec, and an email was (automatically) sent to the patron on 15 Dec.

Within the details portion of the screen, there is a Help button. Clicking this button displays the meaning of the Reply code and the possible British Library customer actions. The Help display for this example is shown in the figure below.
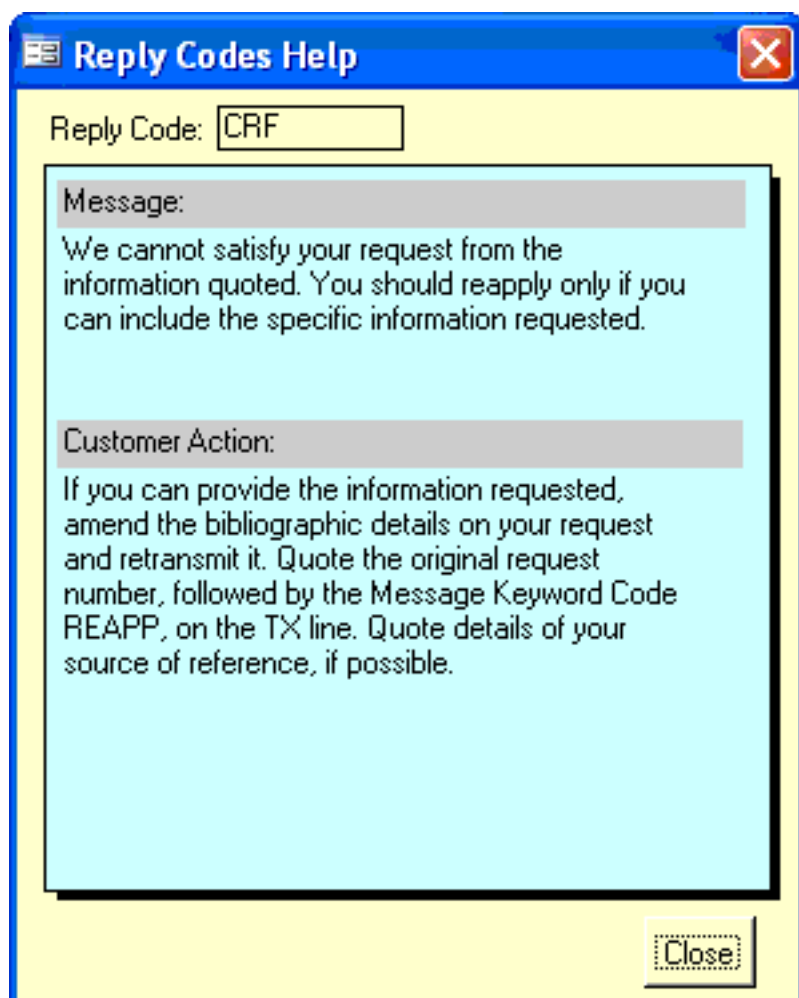
Figure 5.12. Reply Codes Help

In this example, the British Library needs additional information in order to fill the request. The user can add the information such as author, to the bibliographic details section and click the Reapply with updated citation button. As shown in the figure below, a REAPP has been added to the History log and it is queued for sending to the British Library. Later, staff can review the queue of pending Reapps and send them to the British Library. This action also sets a Chaser date in the appropriate borrowing request record. If no other action occurs in the interim, a Chaser is automatically queued for transmission on that date. Chaser dates are set appropriately for most other reply codes if they have been successfully parsed. You can check for replies that could not be parsed (look for ERROR in the Reply code column of the display). You also want to confirm the Chaser and REAPP dates which have been set automatically.

If you double-click any entry in the History Log display (see Figure 5.13, "ARTEmail In Work - History Log" (page 5–15)), you see the details for that entry. For example, you can see the content of the email message sent to the Patron.

The meaning and nature of the action taken by the buttons above the History Log change depending upon the specific reply code received.

Figure 5.13. ARTEmail In Work - History Log

You may also send an email message to the patron from this screen. In this example, the user had directed that a message not be sent automatically when this specific reply code (CRF) was received from the British Library. This is reasonable since the library staff member may want to include some specific details from the request itself in the message to the patron. If you click the Send Email button in the lower right hand corner of the screen, the Patron Query screen displays with the patron's name and email address filled in along with the Subject line and the default email message for this reply code (CRF). The message may be edited if desired and then sent. See Figure 5.14, "Patron Query" (page 5–16) below.
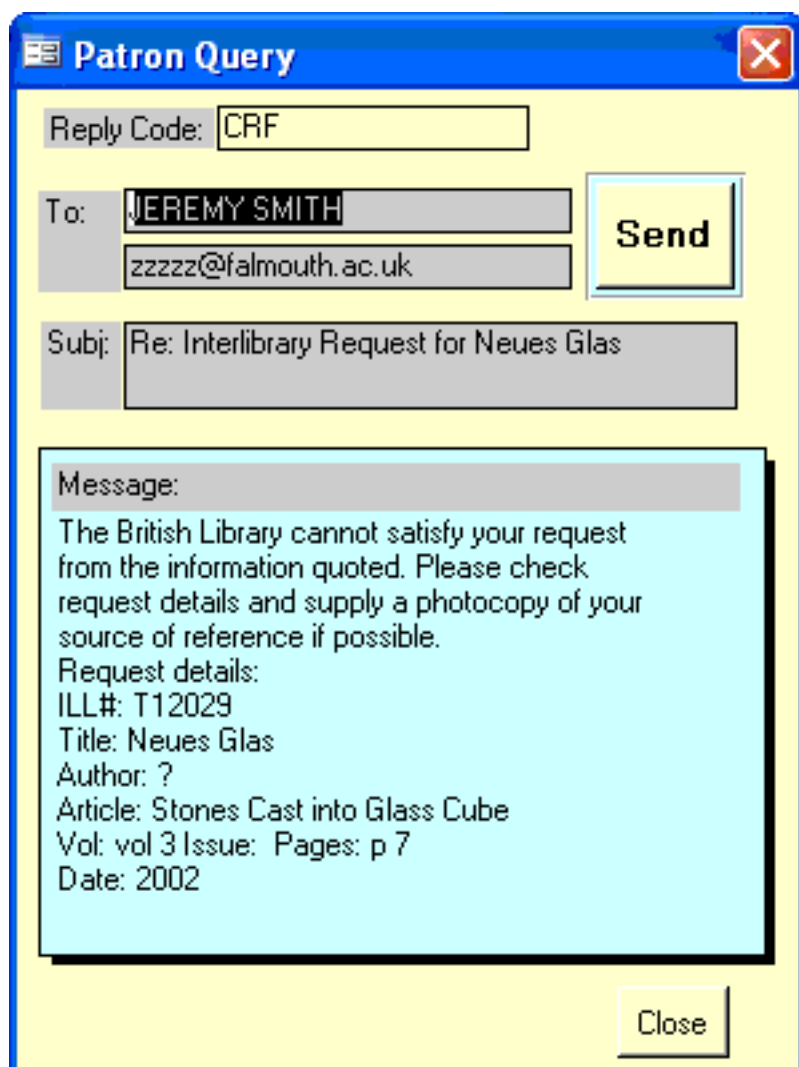
Figure 5.14. Patron Query

In this manner, all of the Replies Intray messages received today can be reviewed and any appropriate ac-
tion taken.

5.11. Monitoring Progress with ILL Management

The remaining five buttons on the ARTEmail screen allow the user to view requests that are waiting for
some kind of action to take place, either on the part of the user or the British Library.

Some reply codes received from the British Library ask that you reapply after a certain period of time
which is specified in the reply itself. CAT*3, for example, directs that you reapply in three weeks time. In
cases such as this, the ARTEmail communications module automatically sets a reapply date for the request.
If you take no action, a REAPP is sent of the date set. Some other reply codes, however, request additional
information regarding the citation that you provided such as CRF, for example, or suggest that you broaden
the search level, NPUR for example, or request some other item of information, DUP for example. Re-
quests such as these require some action on your part. The REAPPs Waiting for Action button displays
those requests. The Reapply with updated citation button is active so that you may update the citation and
direct the software to create the REAPP.

The Items on Wait List button displays all of those items that the British Library has placed on a waitlist.

The Send cancel button is active so that you may issue a CANCEL, if desired. Note that a Chaser date has been set automatically in these cases.

The Pending button displays those items that are waiting for some action on the part of the British Library.

The Overdue/Recall button displays those requests for which an overdue or recall reply code has been received from the British Library.

5.12. Reviewing and Sending Responses to the British Library

Two buttons on the ILL ARTEmail Communications main screen allow the user to preview Chasers/Reapps and other messages such as Cancels before they are actually sent to the British Library. For Chasers and Reapps, the date can be edited or deleted.
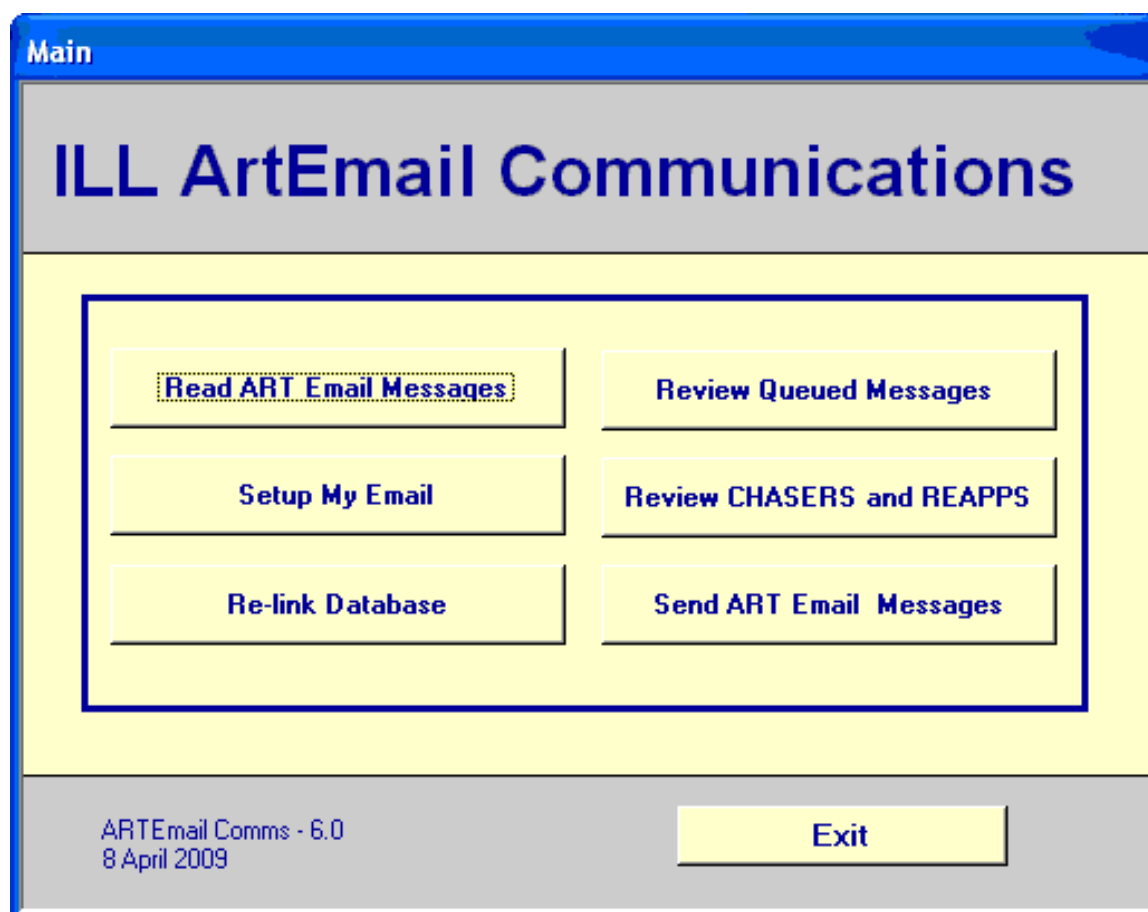
Figure 5.15. ILL ARTEmail Communications - Main Menu

Clicking the Send ARTEmail Messages button from the Main ILL ARTEmail Communications menu (see Figure 5.15, "ILL ARTEmail Communications - Main Menu" (page 5–17)) sends all queued messages to the British Library.

The Review Queued Messages screen presents any pending response to the British Library of the following types:

• Any Cancel or Reapp created by the user through the ARTEmail Items for review screen.

- Any automatically created (already returned) message in response to a Recall Due code from the British Library. Such a message is automatically created if the status of the item is returned when the Recall Due message arrives or if the status is updated to returned by the user after the Recall Due arrives.

The screen allows the user to see that there are items waiting to be sent and to send them.
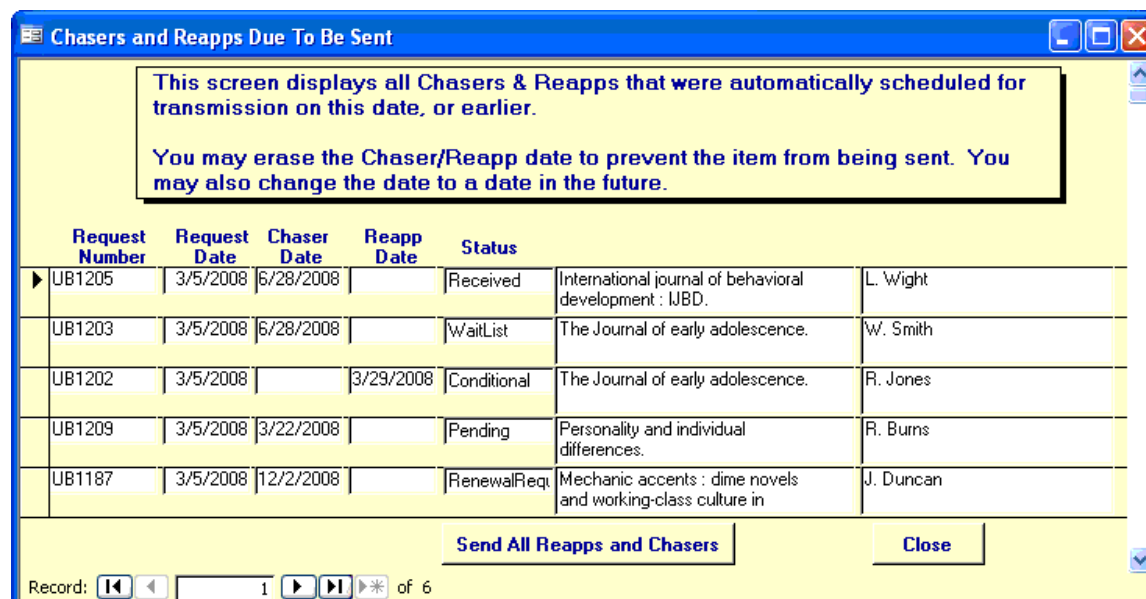

Figure 5.16. Chasers and Reapps Due To Be Sent

The Review CHASERS and REAPPS screen in Figure 5.16, "Chasers and Reapps Due To Be Sent" (page 5–18) presents any pending Chaser or Reapp which was automatically scheduled by setting the Chaser Date or Reapp Date fields. Chaser dates are set automatically when requests are submitted or when Reapps are sent. Reapp dates are set when certain reply codes are received from the British Library indicating that the user should reapply for the item in a certain number of weeks. If the chaser or reapp has been scheduled for the wrong date, the date can be changed. If the chaser or reapp should not be sent at all, the date can be cleared. The request can also be updated to Cancel on the Borrowing Request Update screen with the same effect.

5.13. Updating Records When Items are Received/Returned

For most requests, the item requested arrives from the British Library at some point. As they arrive, the record in the ILL Module database needs to be updated to Received Copy or Received Loan. This is done on the Update Borrowing Requests screen. When items are returned to the British Library, the records should be updated to Returned using the same screen.

5.14. BL Reply Codes

This section provides the BLDSC Reply Code processing table. See Table 5.1, "BL Reply Codes" (page 5–?).

Table 5.1. BL Reply Codes

Code	Description
ABROAD	
	Meaning: We have applied abroad for this item. The number quoted is the International Loan (IL) refer-

Code	Description
	ence number. For any subsequent searches, you will be notified by ABROAD NOW...
	Customer Action: No action is required. It is essential, however, that the IL number assigned is quoted on any correspondence including Chasers. Please refer to your General Handbook for further information.
	Email Text: The British Library has appliedabroad for this item. No action is required.
ABS	Meaning: We do not hold the item as requested, but do hold an abstract/set of abstracts.
	Customer Action: If an abstract/set of abstracts is acceptable, retransmit your complete request. Quote the original request number, followed by the Message Keyword Code CANCEL, on the TX line. On the next line, add the words Please remove from Bindery List.
	Local Status: Pending
	BL Status: Conditional
	Category: Reapp/Other
	ARTEmail Special Words: Abstract/set of abstracts acceptable
	Email Text: The British Library does not hold the item as requested, but does hold an abstract/set of abstracts. Please inform the Interlibrary Loan office as to whether or not an abstract/set of abstracts is acceptable.
BDG	Meaning: This item is being bound. Your request will be supplied as soon as possible (normally within a few days).
	Customer Action: If you do not wish to wait for the item, retransmit your complete request. Quote the original request number, followed by the Message Keyword Code CANCEL, on the TX line. On the next line, add the words Please remove from Bindery List.
	Local Status: Pending
	BL Status: WaitList
	Category: WaitList
	ARTEmail Special Words: Please remove from Bindery List.
	Email Text: This item is being bound. Your request will be supplied as soon as possible (normally within a few days). If you do not wish to wait for the

Code	Description
	item, please inform the Interlibrary.
BLDSC FORM	Meaning: BLDSC form required. Email Text: BLDSC form required.
BUP	Email Text: Your request was sent to a backup library.
CANC	Meaning: This request has now been cancelled, as you requested. Local Status: Unfilled BL Status: Cancelled Email Text: This request has now been cancelled, as you requested.
CAT	Meaning: This item is being cataloged and is temporarily unavailable. Please reapply after the number of weeks quoted. Customer Action: If you wish to reapply, please wait the required number of weeks and then retransmit your complete request. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. Local Status: Pending BL Status: Conditional Category: REAPP/Date Email Text: This item is being cataloged and is temporarily unavailable. If you wish to reapply, please inform the Interlibrary Loan office.
CONF	Meaning: We cannot trace this conference from the information quoted. You should reapply only if you can include the specific information requested. Customer Action: If you can provide the information requested, amend the details on your request and retransmit it. Quote the original request number followed by the Message Keyword Code REAPP on the TX line. Quote details of your source of reference, if possible. Local Status: Pending BL Status: Conditional Category: REAPP/Citation Email Text: The British Library cannot trace this conference from the information quoted. Please inform the Interlibrary Loan office if you can include

Code	Description
	more specific information.
CRF	Meaning: We cannot satisfy your request from the information quoted. You should reapply only if you can include the specific information requested. Customer Action: If you can provide the information requested, amend the bibliographic details on your request and retransmit it. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line Quote details of your source of reference, if possible. Local Status: Pending BL Status: Conditional Category: REAPP/Citation Email Text: The British Library cannot satisfy your request from the information quoted. Please inform the Interlibrary Loan office if you can include more specific information.
CRF/ANI	Meaning: We hold the title you have requested, but the author/article that you have quoted is not in it. Customer Action: Please do not reapply unless you change your details. If reapplying, amend the bibliographicdetails on your request and retransmit it. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. Quote details of your source of reference, if possible. Local Status: Pending BL Status: Conditional Category: REAPP/Citation Email Text: The British Library holds the title you have requested, but the author/article that you have quoted is not in it. Please inform the Interlibrary Loan office if you wish to amend thebibliographic details on your request. Quote details of your source of reference, if possible.
CRF/ART	Meaning: We hold the title you have requested, but the page numbers that you have quoted do not match an article. We need the article title and/or the author's name. Customer Action: Please do not reapply unless you change your details. If reapplying, supply details of the article you require and its author. Amend the details on your request and retransmit it. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. Quote de-

Code	Description
	tails of your source of reference, if possible.
	Local Status: Pending
	BL Status: Conditional
	Category: REAPP/Citation
	Email Text: The British Library holds the title you have requested, but the page numbers that you have quoted do not match an article. Please inform the Interlibrary Loan office with the corrected page numbers Quote details of your source of reference, if possible.
CRF/DNF	Meaning: We cannot trace an exact match for the details quoted in your request. The year/volume and/or the part number does not correspond with any of our stock holdings.
	Customer Action: Please do not reapply unless you change your details. If reapplying, amend the bibliographic details on your request and retransmit it. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. Quote details of your source of reference, if possible.
	Local Status: Pending
	BL Status: Confidential
	Category: REAPP/Citation
	Email Text: The British Library cannot trace an exact match for the details quoted in your request. The year/volume and/or the part number does not correspond with stock holdings. Please inform the Interlibrary Loan office if you can amend the bibliographic details on your request. Quote details of your source of reference, if possible.
DIRECT	Meaning: This item is not available from the BLDSC. We are sending you details, by post, of a supplier that may be able to help.
	Customer Action: Apply direct to the named supplier, following any instructions given. A search fee may have been charged, if applicable.
	Local Status: Unfilled
	BL Status: NotSupplied
	Email Text: This item is not available from the BLDSC. Details will follow.
DL	Meaning: We are not willing to lend this item.
	Local Status: Unfilled

Code	Description
	BL Status: NotSupplied
	Email Text: The British Library is not willing to lend this item.
DL HOME	
	Meaning: We are not willing to lend this item for home reading.
	Local Status: Unfilled
	BL Status: NotSupplied
	Email Text: The British Library is not willing to lend this item for home reading.
DUE	
	Meaning: This item is overdue. You must either return it immediately or apply for a renewal of the loan. Failure to do so will result in you being invoiced for a replacement copy, plus an administration charge which is not refundable.
	Customer Action: This notification is sent when the normal loan period and any automatic extension has expired, or when the return date stipulated by a foreign library has been reached. If you have returned the item within the last two weeks, please ignore this recall. If longer than two weeks has elapsed since you returned it, please retransmit your complete request. Quote the original request number, followed by the words RECALL DUE, on the TX line. On the next line, add the words This item was returned on ... (add the date you returned the item).
	BL Status: Overdue
	ARTEmail Special Words: This item was returned on ... (date).
	Email Text: This item is overdue. You must either return it immediately or apply for a renewal of the loan. Please inform the Interlibrary Loan office if you have returned this item.
DUE BILL	
	Meaning: This item has not been returned, despite an earlier recall. We are arranging to replace it and will send you an invoice to cover the costs involved, including an administration charge which is not refundable.It is no longer possible to extend the loan period.
	Customer Action: It is essential that you now return the item or contact us. If you have already returned the item, retransmit your complete request. Quote the original request number, followed by the words RECALL DUE BILL, on the TX line. On the next line, add the words "This item was returned on ..." For further information, please see your General Handbook.

Code	Description
	BL Status: Overdue ARTEmail Special Words: This item was returned on ... (date). Email Text: This item has not been returned, despite an earlier recall. It is no longer possible to extend the loan period. Please contact the Interlibrary Loan office immediately.
DUE WAIT	Meaning: This item is now needed by another customer. Please return it on, or before, the date stamped inside the item.It is no longer possible to extend the loan period. Customer Action: Return the item on, or before, the date stamped inside the item — any automatic extension is now cancelled. If you have returned the item within the last two weeks, please ignore this recall. If longer than two weeks has elapsed since you returned it, retransmit your complete request. Quote the original request number, followed by the words RECALL DUE WAIT, on the TX line. On the next line, add the words This item was returned on ... BL Status: Overdue ARTEmail Special Words: This item was returned on ... (date). Email Text: This item is now needed by another customer. It is no longer possible to extend the loan period. Please contact the Interlibrary Loan office immediately.
DUP	Meaning: This item is already on loan to you on the request number given. Customer Action: If the second request is required for another end user, you may reapply. Indicate clearly on your request that the item is required for another user and retransmit it. Quote the number of the second request, followed by the Message Keyword Code REAPP, on the TX line. We will then add the request to the Waiting List. Local Status: Pending BL Status: Conditional Category: Reapp/Other
ERR	Meaning: We cannot trace the requested item as quoted, despite an extensive search. Your source of reference may be incorrect. Customer Action: You should not reapply unless you can change or add to your details. If reapplying, amend the bibliographic details on your request and

Code	Description
	retransmit it. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line.
	Local Status: Pending
	BL Status: Conditional
	Category: REAPP/Citation
	Email Text: The British Library cannot trace the requested item as quoted, despite an extensive search. Your source of reference may be incorrect. Please contact the Interlibrary Loan office if you can amend the bibliographic details on your request.
FAILED WWS	Meaning: We regret that this item is not available from abroad. Your request has been cancelled.
	Customer Action: No further action is required.
	Local Status: Unfilled
	BL Status: NotSupplied
	Email Text: This item is not available from abroad. Your request has been cancelled.
FICHE	Meaning: This item is available only as microfiche.
	Customer Action: If this format is acceptable, you should retransmit your request. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. On the next line, add the words Fiche acceptable.
	Local Status: Pending
	BL Status: Conditional
	Category: Reapp/Other
	ARTEmail Special Words: Fiche acceptable.
	Email Text: This item is available only as microfiche. Please contact the Interlibrary Loan office as to whether this format is acceptable.
FILM	Meaning: This item is available only as microfilm.
	Customer Action: If this format is acceptable, you should retransmit your request. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. On the next line, add the words Film acceptable.
	Local Status: Pending
	BL Status: Conditional

Code	Description
	Category: Reapp/Other ARTEmail Special Words: Film acceptable. Email Text: This item is available only as microfilm. Please contact the Interlibrary Loan office as to whether this format is acceptable.
HW	Meaning: Your request has been added to a Waiting List. You should note that the item is in exceptionally heavy demand. We are trying to buy additional copies, where this is possible. The number after HW gives your current position on the Waiting List. Customer Action: If you want to take your request off the Waiting List, you should retransmit your request. Quote the original request number, followed by the Message Keyword Code CANCEL, on the TX line. On the next line, type "Please remove from Waiting List." Local Status: Pending BL Status: WaitList Category: WaitList ARTEmail Special Words: Please remove from Waiting List. Email Text: Your request has been added to a Waiting List. You should note that the item is in exceptionally heavy demand. The British Library is trying to buy additional copies, where this is possible. Please contact the Interlibrary Loan office if you wish to wait or to cancel the request.
LOC	Meaning: We are supplying these locations for you to apply to direct. Customer Action: Refer to your General Handbook for details of how to apply. Local Status: Unfilled BL Status: NotSupplied
LOC SEARCH	Meaning: We are searching for locations. Email Text: The British Library is searching for alternate locations.
LONDON	Meaning: Your request has been passed to our London collections for checking. Any correspondence that follows from this Reply Code should go through the BLDSC. Customer Action: There may be a slight delay before you receive the item or a further response.

Code	Description
	Lending and copying restrictions apply to some parts of the London collections. Normal chasing times apply from the date of this message. Email Text: Your request has been passed to British Library London collections for checking. There may be a slight delay before you receive the item or a further response.
LOST	Meaning: This item has been lost and cannot be re-placed. Customer Action: If you still require this item, please retransmit your complete request and amend your search level as appropriate. Please refer to your handbook if you are changing your search level. Local Status: Pending BL Status: Conditional Category: REAPP/Search Email Text: This item has been lost from the British Library and cannot be replaced. Please contact the Interlibrary Loan office if you wish to broaden your
MAIL	Meaning: A detailed reply will be attached to your request and returned to you by post. A short message after the MAIL code will give an indication of why your request is being returned. Customer Action: It is not necessary to take any action until you receive your request by post.
MISS	Meaning: This item is missing from our stock, but it may be available if you reapply after the number of weeks quoted. Customer Action: If you wish to reapply, wait the required number of weeks and then retransmit your request. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. Local Status: Pending BL Status: Conditional Category: REAPP/Date Email Text: This item is missing from the British Library stock, but it may be available later. Please contact the Interlibrary Loan office.
NCANC	Meaning: We cannot cancel your request, because it is not on a Waiting List. Customer Action: We can only cancel requests

Code	Description
	known to be on Waiting Lists. According to our records, the item has already been supplied to you, or you have been sent a coded reply. If you think that you have not received the item, or you are still uncertain about the status of your request, contact the Cancellations Section:
NCHASE	Meaning: Too early to chase. Customer Action: If you have still had no response after two weeks, or have waited 4 weeks since your request was sent to a backup library (reply code BUP), please chase again.
NCOP	Meaning: UK copyright law does not allow us to copy this item without the written permission of the publisher or other rightsholder. Customer Action: The additional payment of a Copyright Fee may permit copying under these circumstances. You may reapply by transmitting a new request and adding the Message Keyword Code COPYRT to the TX line. Alternatively, add the prefix RZ to your new request number if you have registered for number suppression or are using FAX-Line or an online database host.For more information about Copyright Fees and when they must be paid, please see your General Handbook. Local Status: Unfilled BL Status: NotSupplied Email Text: UK copyright law does not allow the British Library to copy this item without the written permission of the publisher or other rightsholder. The additional payment of a Copyright Fee may permit copying under these circumstances. Please contact the Interlibrary Loan office.
NCPAP	Meaning: The paper you have requested may have been presented at the conference but has not been included in the published proceedings. Local Status: Unfilled BL Status: NotSupplied Email Text: The paper you have requested may have been presented at the conference but has not been included in the published proceedings.
NFICT	Meaning: Not held. Customer Action: Try Fiction Reserves. Local Status: Unfilled BL Status: NotSupplied

Code	Description
	Category: ARTEmail Special Words: Email Text: Not held by the British Library.
NLOAN	Meaning: This item is temporarily unavailable for loan, until after the date given. It may be possible to supply a photocopy of an article. Customer Action: PHOTOCOPY You may reapply immediately for a photocopy of any part of this item, subject to copyright regulations. Just retransmit your request, with amended bibliographic details. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. Replace the Message Keyword Code LOAN with PHOTO. LOAN If you still wish to have the item on loan, wait until after the date given and then retransmit you complete request. Quote the original request number, followed by the Message Keyword Codes REAPP LOAN, on the TX line. Local Status: Pending BL Status: Conditional Category: REAPP/Other Email Text: This item is temporarily unavailable for loan. It may be possible to supply a photocopy of an article. If you still wish to have the item on loan, it may be possible to request it later. Please contact the Interlibrary Loan office.
NMULT	Meaning: UK copyright law does not allow multiple copies of a single article, or copies of more than one article from a single issue, to be made for the same end user. Customer Action: See note to NCOP or, if you require more than three copies of an article, please contact our LEXICON service: Local Status: Unfilled BL Status: NotSupplied Email Text: UK copyright law does not allow multiple copies of a single article, or copies of more than one article from a single issue, to be made for the same end user. Please contact the Interlibrary Loan office.
NOBACKUPS	
NOE	Meaning: We do not hold the requested edition, but do hold the alternative edition indicated. Customer Action: If you want to accept the edition

Code	Description
	offered, amend the edition details originally quoted and retransmit your request. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. If you want to continue your search for theoriginal edition, retransmit your complete request. Quote the original request number, followed by the Message Keyword Code REAPP, and ammend your search level if appropriate. Please refer to your handbook if you are changing your search level. Local Status: Pending BL Status: Conditional Category: REAPP/Other Email Text: The British Library does not hold the requested edition, but does hold an alternative edition. Please contact the Interlibrary Loan office.
NOP	Meaning: We do not hold the requested volume or part. Customer Action: If you wish us to search further, retransmit your complete request. Quote the original request number, followed by the Message Keyword Code REAPP, and amend your search level as appropriate. Please refer to your handbook if you are changing your search level. Local Status: Pending BL Status: Conditional Category: REAPP/Search Email Text: The British Library does not hold the requested volume or part. Please contact the Interlibrary Loan office if you wish us to search further.
NO RENEW	Meaning: This loan cannot be renewed. Customer Action: Please return the item as soon as possible, not later than the end of the loan period. Any automatic extension of the loan period is now cancelled. Email Text: This loan cannot be renewed. Please return the item as soon as possible, not later than the end of the loan period.
NOS	Meaning: Not on shelf. Customer Action: We cannot look for this item at present. Local Status: Unfilled BL Status: NotSupplied

Code	Description
	Email Text: The British Library does not have this item on shelf and cannot look for this item at present.
NOT	Meaning: We do not hold the requested title. Customer Action: If you wish us to search further, retransmit your complete request. Quote the original request number, followed by the Message Keyword Code REAPP, and amend your search level as appropriate. Please refer to your handbook if you are changing your search level. Local Status: Pending BL Status: Conditional Category: REAPP/Search Email Text: The British Library does not hold the requested title.Please contact the Interlibrary Loan office if you wish to search further.
NPUB	Meaning: We have not been able to confirm that this item has been published. Customer Action: If you can quote some evidence of publication, retransmit your complete request. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. Quote details of your source of reference. Local Status: Pending BL Status: Conditional Category: REAPP/Citation Email Text: The British Library has not been able to confirm that this item has been published. Please contact the Interlibrary Loan office if you can quote some evidence of publication. Quote details of your source of reference.
NPUR	Meaning: We have decided not to purchase this item. This might be because the item is out of scope for our collections or is too expensive. Customer Action: If you wish us to search further, retransmit your complete request. Quote the original request number, followed by the Message Keyword Code REAPP, and amend your search level as appropriate. Please refer to your handbook if you are changing your search level. Local Status: Pending BL Status: Conditional Category: REAPP/Search

Code	Description
	Email Text: The British Library has decided not to purchase this item. This might be because the item is out of scope for our collections or is too expensive. Please contact the Interlibrary Loan office.
NPUR/NA	Meaning: We are unable to purchase this item, because it is not available to buy. Customer Action: If you wish us to search further, retransmit your complete request. Quote the original request number, followed by the Message Keyword Code REAPP, and amend your search level as appropriate. Please refer to your handbook if you are changing your search level. Local Status: Pending BL Status: Conditional Category: REAPP/Search Email Text: The British Library is unable to purchase this item, because it is not available to buy. Please contact the Interlibrary Loan office.
NQ	Meaning: We are unable to supply this item immediately. Local Status: Unfilled BL Status: NotSupplied Email Text: The British Library is unable to supply this item immediately.
NRL	Meaning: No locations traced within the region. Local Status: Unfilled BL Status: NotSupplied Email Text: No locations traced within the region. Please contact the Interlibrary Loan office.
NTRANS	Meaning: We have no record of a translation of this document, at the BLDSC or elsewhere, and we do not hold the original. Local Status: Unfilled BL Status: NotSupplied Email Text: There is no record of a translation of this document, at the BLDSC or elsewhere, and the British Library does not hold the original.
NUKL	Meaning: Unfortunately, we cannot trace any locations willing/able to supply in the UK or Ireland from the holdings records available to the BLDSC.

Code	Description
	Customer Action: If you wish, you can reapply extending your level of search to include either SBL or libraries worldwide (WWS). See your General Handbook.
	Local Status: Pending
	BL Status: Conditional
	Category: REAPP/Search
	Email Text: Unfortunately, the British Library cannot trace any locations willing/able to supply in the UK or Ireland from the holdings records available to the BLDSC. Please contact the Interlibrary Loan office.
OLWL	Meaning: This item is on loan. Your request has been added to a Waiting List.
	Customer Action: The item is due back on the date indicated. If you wish to cancel the request, contact the library.
	Local Status: Pending
	BL Status: WaitList
	Category: WaitList
	Email Text: This item is on loan. Your request has been added to a Waiting List. Please contact the Interlibrary Loan office.
O/O	Meaning: This item is on order for our stock, but your request has not been added to the Waiting List. The item might be available if you reapply after the number of weeks quoted.
	Customer Action: If you wish to reapply, wait the required number of weeks and then retransmit your complete request. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line.
	Local Status: Pending
	BL Status: Conditional
	Category: REAPP/Date
	Email Text: This item is on order for BLDSC stock, but your request has not been added to the Waiting List. Please contact the Interlibrary Loan office.
O/O NLOAN	Meaning: The item requested is on order for our stock. When it is received, however, it will not be available for loan for six months.
	Customer Action: PHOTOCOPY You may reapply

Code	Description
	immediately for a photocopy of any part of this item, subject to copyright regulations. Your request will then be added to a Waiting List. Amend your request to give clear bibliographic details of the article you require, then retransmit it. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line (delete LOAN). On the next line, add the words Please add to O/O Waiting List. LOAN If you still require a loan, wait the number of weeks specified after the O/O NLOAN code, then retransmit your complete request. Quote the original request number, followed by the Message Keyword Code REAPP, on the TX line. Local Status: Pending BL Status: Conditional Category: REAPP/Other ARTEmail Special Words: Please add to O/O Waiting List. Email Text: The item requested is on order for BLDSC stock. When it is received, however, it will not be available for loan for six months. You may re-apply immediately for a photocopy of any part of this item, subject to copyright regulations. Your request will then be added to a Waiting List. You may also resubmit the request at a later time. Please contact the Interlibrary Loan office.
O/O WL	Meaning: This item is on order for our stock. Your request has been added to the Waiting List. Please note that there may be other requests on the Waiting List. Customer Action: Please wait at least 16 weeks before chasing this request. If you want to take your request off the Waiting List, retransmit your complete request. Quote the original request number, followed by the Message Keyword Code CANCEL, on the TX line. On the next line, add the words Please remove from O/O WL ... (quote here any Acquisitions number you have been given). Local Status: Pending BL Status: WaitList Category: WaitList ARTEmail Special Words: Please remove from O/O WL …(date) Email Text: This item is on order for BLDSC stock. Your request has been added to the Waiting List. Please note that there may be other requests on the Waiting List. Please contact the Interlibrary Loan

Code	Description
	office if you wish to cancel the request.
ORIG	Meaning: We do not hold an English translation of this item. We hold it in the original language only. Customer Action: If the original language is acceptable, retransmit your complete request. Quote the original request number, delete the Message Keyword Code TRANSON and replace it with RE-APP on the TX line. On the next line, add the words ORIG acceptable. Local Status: Pending BL Status: Conditional Category: REAPP/Other ARTEmail Special Words: ORIG acceptable Email Text: The British Library does not hold an English translation of this item. It is held it in the original language only. Please contact the Interlibrary Loan office.
ORIG AB	Meaning: We do not hold an English translation of this item. We hold it in the original language with an English abstract. Customer Action: If the original language is acceptable, retransmit your complete request. Quote the original request number, delete the Message Keyword Code TRANSON and replace it with the Keyword Code REAPP on the TX line. On the next line, add the words ORIG AB acceptable. Local Status: Pending BL Status: Conditional Category: REAPP/Other ARTEmail Special Words: ORIG AB acceptable Email Text: The British Lubrary does not hold an English translation of this item.It is held it in the original language with an English abstract. Please contact the Interlibrary Loan office.
OWN	Meaning: According to our records, this is held in your own stock. Customer Action: If it is no longer held, approach one of the locations listed. Local Status: Unfilled BL Status: NotSupplied

Code	Description
PAP	Meaning: There is no bound volume of papers for this conference We hold separate, numbered papers only. Customer Action: For copyright reasons, we will normally only be able to supply the item on loan. If you reapply, quote the paper number and/or author/title. Amend your request and retransmit it. Quote the original request number and follow this with the Message Keyword Code REAPP on the TX line. Local Status: Pending BL Status: Conditional Category: REAPP/Citation Email Text: There is no bound volume of papers for this conference. The British Library holds separate, numbered papers only. Please contact the Interlibrary Loan office.
QOR	Meaning: Please quote the source of reference. Customer Action: We cannot help further unless you are able to do this. Local Status: Pending BL Status: Conditional Category: REAPP/Citation Email Text: Please quote the source of reference. Please contact the Interlibrary Loan office.
RCOP	Meaning: The item requested is not covered by the BL's copyright licensing agreement; therefore, we cannot supply you with a photocopy. Customer Action: We can still supply a loan copy, if you are registered for the Loan Service.Retransmit your request, but delete the article details. Quote the original request number, followed by the Message Keyword Codes REAPP LOAN, on the TX line. You should also delete any RZ or COPYRT codes.If you do not want to continue, you need take no further action. Local Status: Pending BL Status: Conditional Category: REAPP/Other Email Text: The item requested is not covered by the BL's copyright licensing agreement; therefore, we cannot supply you with a photocopy. Please contact the Interlibrary Loan office.

Code	Description
RCOP/NLOAN	Meaning: The item requested is not covered by the BL's copyright licensing agreements. It is also temporarily unavailable for loan, until the date given. Customer Action: We can still supply a loan copy, if you are registered for the Loan Service. First wait the required length of time, then delete the article details and retransmit your request. Quote the original request number, followed by the Message Keyword Codes REAPP LOAN, on the TX line. You should also delete any RZ or COPYRT codes.If you do not want to continue, you need take no further action. Local Status: Pending BL Status: Conditional Category: REAPP/Date Email Text: The item requested is not covered by the BL's copyright licensing agreements. It is also temporarily unavailable for loan. Please contact the Interlibrary Loan office.
REF	Meaning: According to our sources, there are no lending locations in the UK or Ireland. The item you have requested may be held by libraries that allow access for reference or that may be able to supply a photocopy. Customer Action: Refer to your General Handbook for details of how to apply. Local Status: Unfilled BL Status: NotSupplied Email Text: According to our sources, there are no lending locations in the UK or Ireland. Please contact the Interlibrary Loan office.
REF LOCR	Meaning: There are no lending locations within the region. It is available, for reference only, in the locations provided. Local Status: Unfilled BL Status: NotSupplied Email Text: There are no lending locations within the region. It is available, for reference only, in the locations provided. Please contact the Interlibrary Loan office.
RENEWED	Meaning: Your loan has been renewed The date after the Reply Code is the new return date. Normal loan conditions apply. Customer Action: Usually, you need take no further

Code	Description
	action, other than returning the item at the end of the new loan period. See your General Handbook for more information. Email Text: Your loan has been renewed.
RESUPPLY	Meaning: In response to your enquiry, this item has been resupplied on the date indicated. Customer Action: You need take no further action.
SHIPPED Ariel	Meaning: The requested item has been supplied as a retention copy. This message will be followed by an indication of the method of delivery: Ariel, Copy (postal photocopy), Fax or Micro (microform). Customer Action: This Reply Code will only be present if you have asked to be supplied with "shipped" information in your Replies Intray. Please allow time for postal delivery, and only chase items after the usual period. Local Status: Pending BL Status: Shipped Email Text: The requested item has been supplied electronically as a retention copy.
SHIPPED Copy	Meaning: The requested item has been supplied as a retention copy. This message will be followed by an indication of the method of delivery: Ariel, Copy (postal photocopy), Fax or Micro (microform). Customer Action: This Reply Code will only be present if you have asked to be supplied with "shipped" information in your Replies Intray. Please allow time for postal delivery, and only chase items after the usual period. Local Status: Pending BL Status: Shipped Email Text: The requested item has been supplied as a retention copy. Please allow time for postal delivery.
SHIPPED Fax	Meaning: The requested item has been supplied as a retention copy. This message will be followed by an indication of the method of delivery: Ariel, Copy (postal photocopy), Fax or Micro (microform). Customer Action: This Reply Code will only be present if you have asked to be supplied with "shipped" information in your Replies Intray. Please allow time for postal delivery, and only chase items after the usual period.

Code	Description
	Local Status: Pending
	BL Status: Shipped
	Email Text: The requested item has been supplied by FAX as a retention copy.
SHIPPED Micro	Meaning: The requested item has been supplied as a retention copy. This message will be followed by an indication of the method of delivery: Ariel, Copy (postal photocopy), Fax or Micro (microform).
	Customer Action: This Reply Code will only be present if you have asked to be supplied with "shipped" information in your Replies Intray. Please allow time for postal delivery, and only chase items after the usual period.
	Local Status: Pending
	BL Status: Shipped
	Email Text: The requested item has been supplied in microform as a retention copy.
SHIPPED LOAN	Meaning: The requested item has been supplied on loan.
	Customer Action: This Reply Code will only be present if you have asked to be supplied with "shipped" information in your Replies Intray. Please allow time for postal delivery, and only chase items after the usual period.
	Local Status: Pending
	BL Status: Shipped
	Email Text: The requested item has been shipped on loan. Please allow time for postal delivery.
SUPPL	Meaning: With reference to your chaser, the item has been supplied as indicated.
	Customer Action: If you have not received the item within two weeks of the indicated supply date, contact the Chaser Team:
TOTAL LOAN	Meaning: The item you have requested is in the number of volumes/parts specified. In order to keep a clear record on our shelves, we need a separate completed request for each volume/part you require on loan.
	Customer Action: You may reapply for the complete work, a single volume/part, or if you want a photocopy you can provide details of a specific article. The number after the code is the total number of separate requests you should transmit if you require

Code	Description
	the whole work on loan.If you require more than one volume/part on loan, you must transmit separate requests, one per volume/part you want. Repeat the full details and add the volume/part number for each request. If you only require a single volume/part on loan, retransmit your request. Quote the original request number, followed by the Message Keyword Code REAPP LOAN, on the TX line. Amend the text to indicate clearly which volume/part you require. If you require a photocopy of an article, retransmit your request. Quote the original request number, followed by the Message Keyword Code REAPP PHOTO, on the TX line Amend the text to indicate clearly which article you require. Make sure that you also delete the Message Keyword Code LOAN. Local Status: Pending BL Status: Conditional Category: REAPP/Citation Email Text: The item you have requested is in a number of volumes/parts. Please contact the Interlibrary Loan office.
USE	Meaning: Your request for this item has been added to a Waiting List. The number quoted refers to your position on the Waiting List. Customer Action: Each position means a delay of about four weeks, therefore please allow the appropriate amount of time before chasing.If you want to take your request off the Waiting List, retransmit your request. Quote the original request number and add the Message Keyword Code CANCEL after this on the TX line. On the next line, type Please remove from Waiting List. Local Status: Pending BL Status: WaitList Category: WaitList ARTEmail Special Words: Please remove from Waiting List. Email Text: Your request for this item has been added to a Waiting List. Please contact the Interlibrary Loan office if you wish to
USE O/D	Meaning: Your request is still on the Waiting List but, unfortunately, the item is considerably overdue. We are urgently recalling the item from the customer that has it on loan. Customer Action: If you want to take your request off the Waiting List, retransmit your request. Quote

Code	Description
	the original request number and add the Message Keyword Code CANCEL after this on the TX line. On the next line, type Please remove from Waiting List. Local Status: Pending BL Status: WaitList Category: WaitList ARTEmail Special Words: Please remove from Waiting List. Email Text: Your request is still on the Waiting List but, unfortunately, the item is considerately overdue. The British Library is urgently recalling the item from the customer that has it on loan. Please contact the Interlibrary Loan office if you want to take your request off the Waiting List.
WD	Meaning: This item has been withdrawn from stock. Local Status: Unfilled BL Status: NotSupplied Email Text: This item has been withdrawn from British Library stock.
WLNR	Meaning: There is a Waiting List for this item. We are not willing to reserve it. Local Status: Unfilled BL Status: NotSupplied Email Text: There is a Waiting List for this item. The British Library is not willing to reserve it. Please contact the Interlibrary Loan office.
WLR	Meaning: There is a Waiting List for this item. We are willing to reserve it. Local Status: Unfilled BL Status: NotSupplied Email Text: There is a Waiting List for this item. The British Library is willing to reserve it. Please contact the Interlibrary Loan office.

Chapter 6. ISO Processing

6.1. ISO Interface to the National Library of Australia - Libraries Australia Document Delivery (LADD)

6.1.1. General

See http://www.nla.gov.au/librariesaustralia/manuals.html for a general description of how ISO compliant systems interact with the LADD. In the context of that discussion, the Voyager ILL Module takes on the role of an ISO Compliant Server that can initiate and receive ISO transactions via the LADD gateway.

This section assumes general familiarity with the operation of the ILL Module and only discusses unique or new features.

6.1.2. LADD Set up

To permit communications with the LADD Gateway, the user must provide certain information. Select the Setup LADD Service Information menu item from the Options menu and the screen in Figure 6.1, "Setup LADD Service Information" (page 6–1) displays.

Figure 6.1. Setup LADD Service Information

The ILL Module uses direct TCP communications to communicate with the Gateway. The first entry on

this screen is the TCP address and port used by the Gateway and is provided by the LADD staff. Per the ISO standard, the port is always 1611 and is separated from the TCP address by a colon.

There are fields for information about the user's library.

- My LADD Symbol

- My LADD Name

- My ISO TCP Address

The port must be set to 1611.

The user's library symbol should be preceded by the symbol of the authority that grants symbols such as the National Library of Australia (NLA) for Australian libraries.

There are four defaults that must be set.

- Default Service Level

- Default Copyright

- Default Delivery Method

- Default Currency Code

These values are associated with each new borrowing request when they are created.

Note

If you are setting up an LADD account in the General Defaults section of ILL Request, the Work-station ID and Last Transaction ID must be unique and numeric only.

6.1.3. Borrowing operations – Submitting a request to the LADD

Requests that patrons have submitted via the WebVoyáge interface are available to library ILL staff after they click **Get New Borrowing Requests** in ILL Request. The details of a request can be viewed from the details dialog box as shown in Figure 6.2, "Request Details Dialog Box" (page 6–3).

Figure 6.2. Request Details Dialog Box

With this screen the staff member can adjust the settings for service type, shipping, copyright, and service level if necessary. They can also review their own holdings to determine if they actually hold the item being requested. If they do hold the item or require additional information from the patron, they can send an email to the patron.

The last task is to determine the locations to which to send the request. This is done using the LADD search capabilities. LADD searches the Australian National Bibliographic Database (NBD) using Internet Explorer, or equivalent, and determines which libraries hold the particular item.

The staff person can choose which libraries they want to route the request to and place the symbol for each of those libraries in the Locations field in the ILL Request Review Details dialog box.

ILL Request automatically places `NLA:` in front of each symbol. There is a maximum of five entries in the field.

Note

If all five are unable to fill the request, a new request needs to be created.

When the user clicks **Send requests** from the **Summary** dialog box, all requests flagged as ready to go are sent to the LADD Gateway. The request is entered into the master ILL Management database (the Borrowing Request table) with a status of Pending. LADD routes the request to the first potential lender in the field. This completes the submission phase.

6.1.4. Borrowing Operations – Monitoring active requests

After requests have been submitted and routed by LADD to the first potential lender, the borrowing staff uses the ILL Management component to monitor the progress of the request, respond to messages from lenders, and update the status of requests.

Upon receiving a lending request the lender might action the request with a Conditional message. This could occur, for example, if the lender wishes to stipulate that the item is available for library use only. As a result of the update action, the LADD Gateway sends a Conditional message to the borrower. The Receiver Communications component of the ILL Module (see the ISO Communications section) automatically reads this message and updates the external status of the request to Conditional.

Requests with a status of Conditional require an action on the part of the library staff. The **Borrowing ISO Requests On Order** dialog box (ILL Management>>*Borrowing* or *Lending*>>ISO Items for Review) alerts the staff that such messages exist and provides the tools to respond to the lender. This dialog box is shown in Figure 6.3, "ISO Items For Review Dialog Box" (page 6–4).
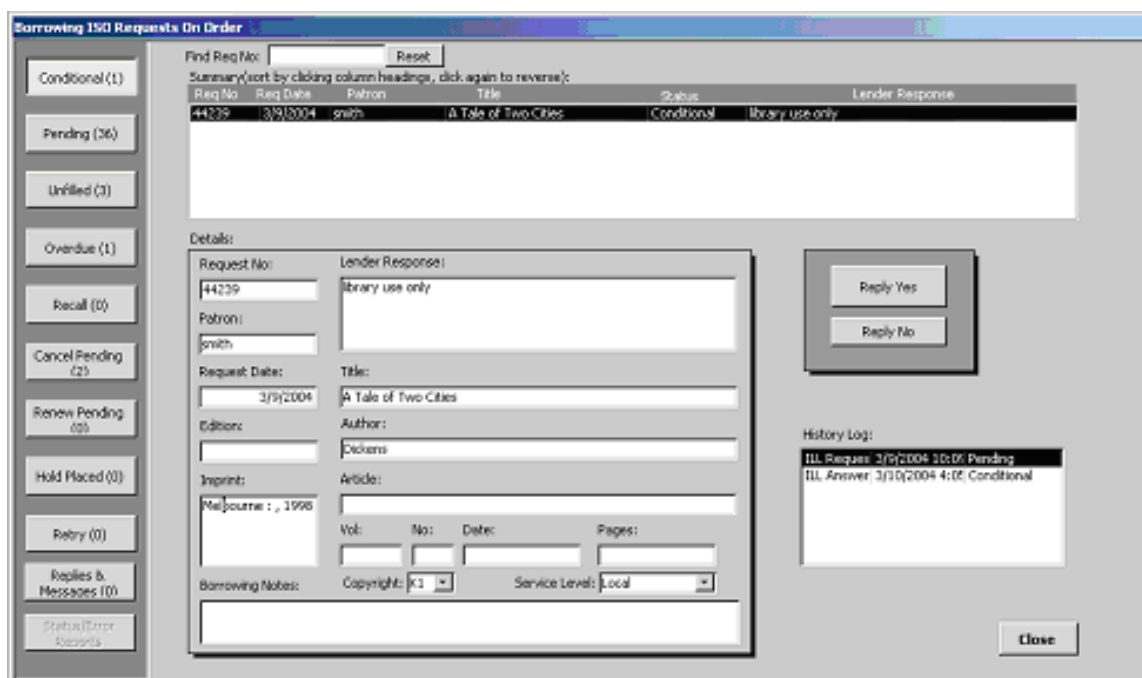
Figure 6.3. ISO Items For Review Dialog Box

The dialog box displays various categories of requests to be selected and indicates the number of requests in each category. Clicking one of the buttons displays the requests in that category in the summary list box. Clicking one of the items in the list displays the details of the request and the history of all previous actions concerning that request. Actions that are allowable for requests in each category are also available on the **Borrowing ISO Requests On Order** dialog box.

In the example above, there is one request in the Conditional category. The previous actions were the original submission of the request and the receipt of the Conditional message. The actions available are to reply Yes or No. Clicking one of these buttons causes the appropriate ISO message to be sent to the lender by the Sender Communications component.

If the first potential lender cannot supply the requested item, they action the request to non-supply and a corresponding message is sent to the borrower. The ILL Management component automatically forwards the request to the next potential lender in the field.

6.1.5. Borrowing Operations – Receiving items

If a potential lender fills a request, they action the request to Shipped using their interface to the LADD system and send the item to the borrowing library. As a result of the update action, the LADD Gateway sends a Shipped message to the borrower. The Receiver Communications component of the ILL Module (see ISO Communications section below) automatically reads this message and updates the external status

of the request to Shipped.

When the item arrives at the borrowing library, staff actions the request to Received Loan or Received Copy using the Borrowing Update screen. This automatically causes a Received message to be sent to the LADD Gateway by the Sender Communications component.

6.1.6. Borrowing Operations – Returning items

When returnable items are ready to be returned to the lender, the staff actions the request to Returned using the Borrowing Update screen. This automatically causes a Returned message to be sent to the LADD Gateway by the Sender Communications component.

6.1.7. Lending Operations – Reviewing new lending requests

The Receiver Communications component of the ILL Module will be constantly listening for new messages to arrive. One type of message that may arrive is an ILL Request message. This is stored into the database as a new lending request.

All new lending requests, whether from OCLC, Docline, LADD or directly from another ISO-compliant library, can be examined through the Review New Lending Requests feature available on the Main Lending screen. LADD requests are treated the same as any other new lending request. The only difference behind the scenes is that the ILL Management module will queue an ISO message for those items updated to Conditional or No instead of a message appropriate for Docline or OCLC. These LADD messages are sent automatically to the LADD Gateway by the Sender Communications component.

6.1.8. Lending Operations – Updating lending requests

When items are ready to be shipped to the borrowing library, the staff actions the requests to YesLoan or YesCopy using the Lending Update screen. This automatically causes a Shipped message to be sent to the LADD Gateway by the Sender Communications component.

6.1.9. Lending Operations – Monitoring active requests

During the course of a lending transaction the borrower may request that the ILL request be cancelled or request a renewal or the lender may issue a recall for an item. Either party may issue a Lost, Damaged or Message message. These messages are displayed on the Lending ISO Items for Review screen. This screen is nearly identical to the Borrowing ISO Items for Review screen. It displays the records in each category (Cancel Pending, Renew Pending, Overdue, Recall and Lost/Damaged/Message) and provides the ability to initiate the appropriate response.

6.1.10. Lending Operations – Receiving items

Ultimately the borrower returns items to the lender. These items are updated to Complete on the Lending Update screen. This causes a Checked in message to be sent to the LADD Gateway.

6.2. Peer-to-Peer ISO

6.2.1. General

The ISO Interlibrary Loan standards 10160/10161 provide a description of standard messages that may be exchanged directly between libraries in order to manage the interlibrary loan process.

This process is separate and distinct from the familiar proprietary ILL systems such as OCLC and Docline. These systems manage much of the detail of ILL transactions such as routing to lenders and managing lending charge balance of payments. An ISO compliant system performs these tasks for itself.

ISO messages can be sent to another library by either direct TCP computer-to-computer connection or as an email attachment. The ILL Module supports direct TCP computer-to-computer connection only. This communication is accomplished automatically by the ISO Sender and Receiver Communications components of the ILL Module.

Libraries with Voyager ILL 4.1 and beyond can send ISO TCP requests between each other directly

(peer-to-peer). Both libraries need a static IP that they share with each other.

See the ISO Standards 10160/10161 (available from ANSI) for details of the protocol.

Those familiar with OCLC and Docline find some new features. There are new messages, new states, and new rules. For example if the borrower issues a CANCEL message to the lender, the state of the request becomes Cancel Pending. The lender must respond with either a CANCEL YES or CANCEL NO message. This is somewhat similar to the renewal process with OCLC. There are also new messages: LOST, DAMAGED, and MESSAGE.

In order for two libraries to directly interoperate using the ISO standard, both must have ISO compliant ILL applications.

6.2.2. ISO Set up

In order to send an ISO message, certain information about your library must be included in the message. This information is entered in the Set up My ISO Library option in ILL Request. This dialog box is shown in Figure 6.4, "Request Set Up My ISO Library" (page 6–6).
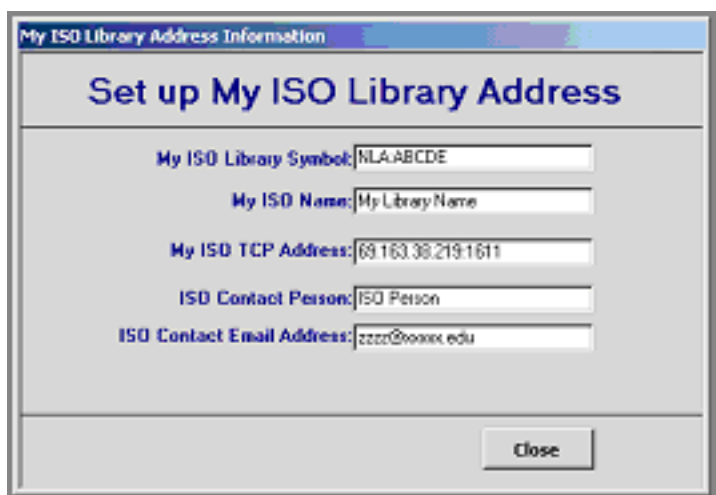
Figure 6.4. Request Set Up My ISO Library

The ISO standard requires that a library symbol be composed of two parts: a Domain and a symbol. The domain is the authority for issuing the symbol. OCLC, NLM, NLA, and BL are examples of domains. As shown in the example, a colon separates the domain and the symbol.

The ISO TCP address is the address of the computer where the TCP Receiver component is installed. When the TCP Receiver is started up, it's TCP address will be automatically detected and displayed on the screen. This address should be followed by a colon and the number 1611. This is the port that ISO requests are transmitted to (and received on). If the computer where the ISO Receiver component is installed is attached to a router that is, in turn, attached to the internet, then the router must be configured to route port 1611 to the ISO TCP Receiver computer. In addition, the TCP address of the router should be entered on the ISO set up screen.

The information on this dialog box is included in any new ISO borrowing request and is used by the lender's ISO application to send responses back to the borrower. Therefore, it is important that the ISO TCP address be correct and constant.

6.2.3. Borrowing Operations – Submitting a Peer-to-Peer ISO Request

An important and obvious aspect of peer-to-peer ISO ILL is that an ISO compliant library can only send an ISO request to another ISO compliant library and the borrower must know the ISO TCP address of the po-

tential lender.

To send a request to another ISO compliant library, choose Library in the Supplier drop down box, select ISO TCP in the How to Send drop down box and select the library symbol from the list of libraries. If the TCP address is not present, it may be entered on the screen and will be saved with the library record.

The port 1611 must be included as part of the address (See Figure 6.5, "Send Request to Another ISO Library" (page 6–7)).

Figure 6.5. Send Request to Another ISO Library

Once a request has been submitted in this way, it is treated exactly the same as any other request. The ILL Module knows how the request was submitted and will transmit all future updates via the ISO protocol.

6.2.4. ISO Communications

Two new software components provide two mechanisms for sending and receiving ISO messages: the ISO TCP Receiver and the ISO TCP Sender.

These two components must be running on the ILL server. They must also be running at all times. The screens for the two components are shown below.

The only value you can set on the TCP Receiver is the setting for Close connection if idle for more than xx seconds. The only values you can set for the TCP Sender are the Check for outgoing messages every xx minutes and Timeout after waiting xx seconds to connect. The values shown are nominal values.

Each of these two components should be running all the time on one, and only one, pc. The Receiver (see Figure 6.6, "ISO TCP Receiver" (page 6–8)) constantly listens for the arrival of new messages and places the received data in a queue in the database where it is processed.

The Sender component (see Figure 6.7, "ISO TCP Sender" (page 6–9)) constantly examines an outgoing queue in the database and sends any data that is there.
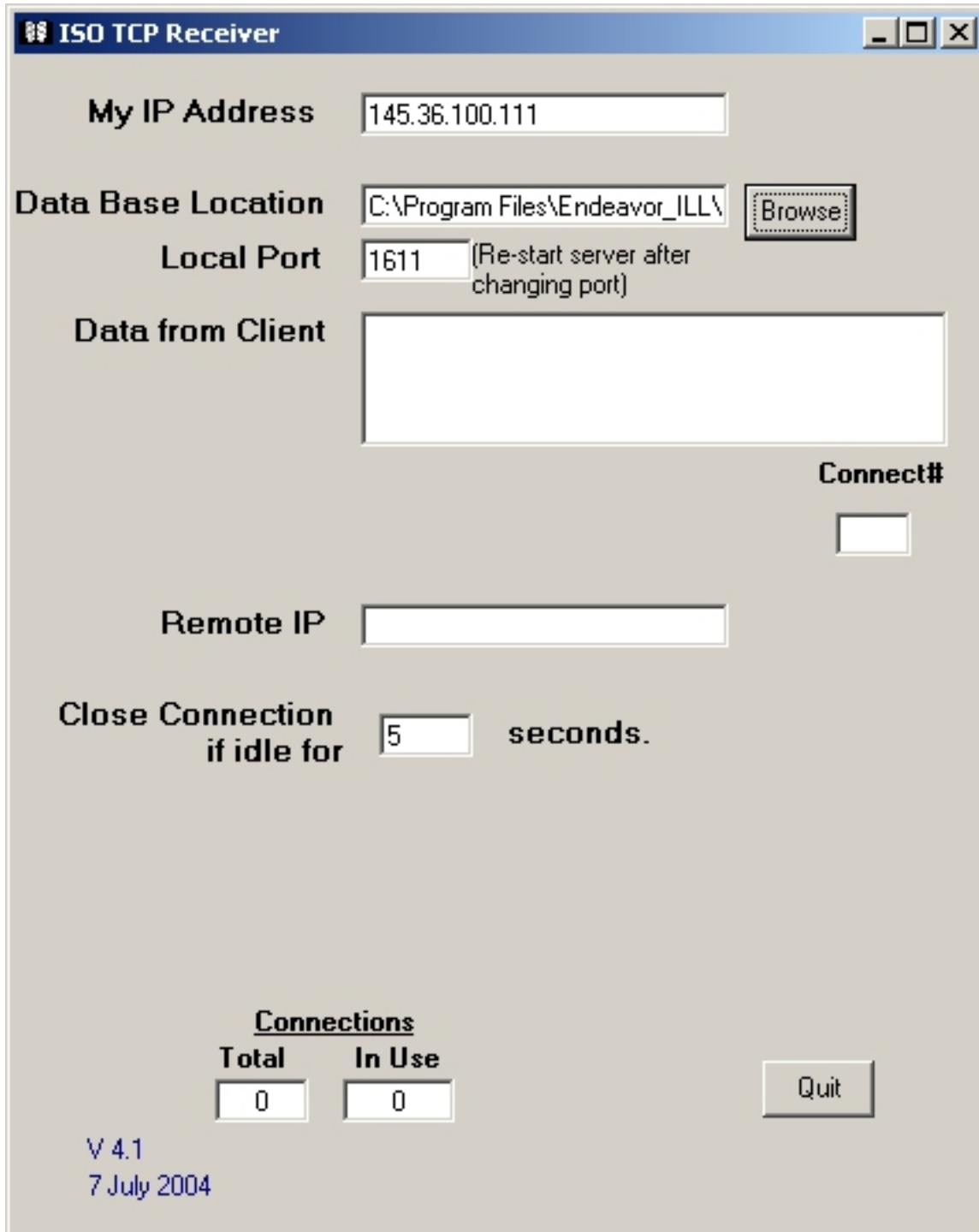
Figure 6.6. ISO TCP Receiver
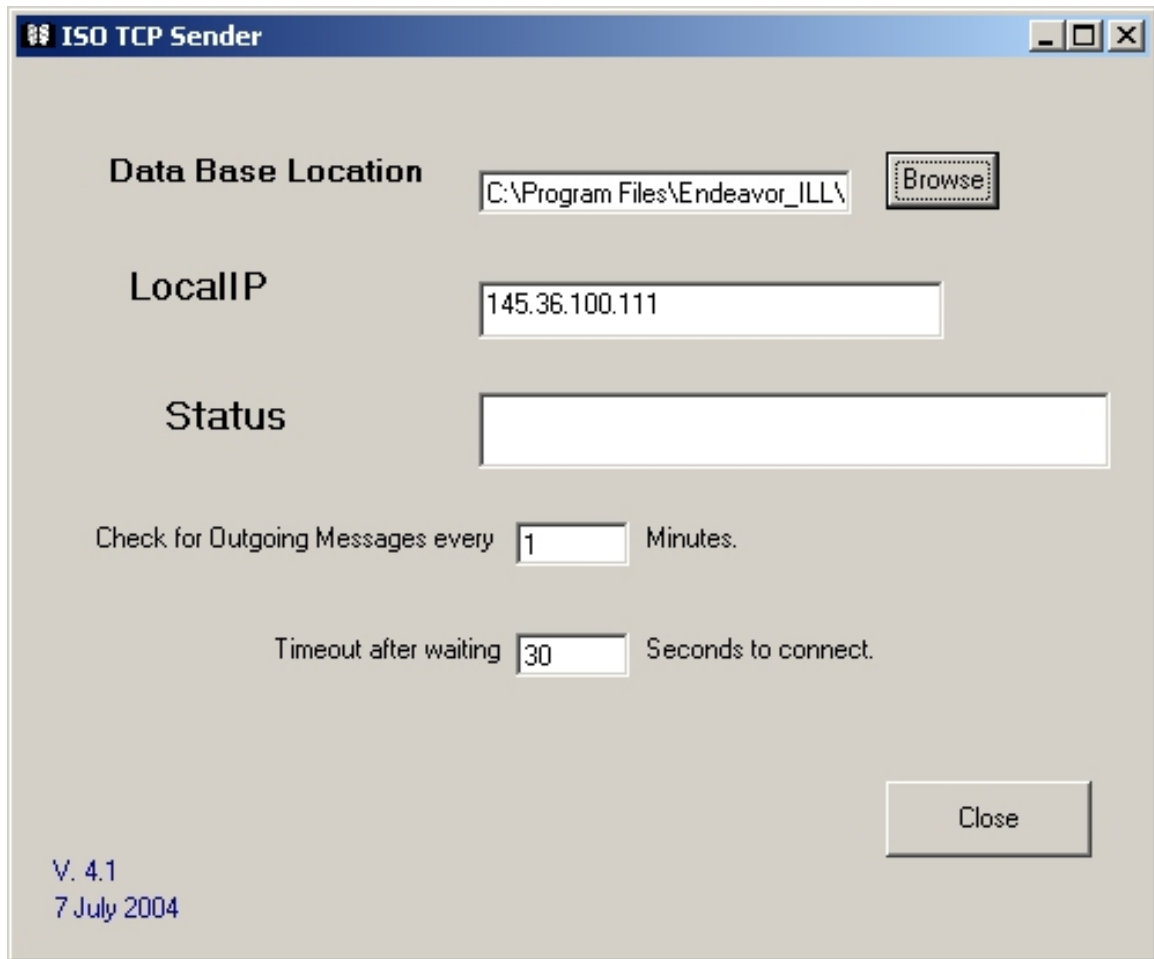
Figure 6.7. ISO TCP Sender

Should the computer need to be re-started for any reason, re-start these applications from the shortcuts on the desktop.

Chapter 7. ILL Request

7.1. ILL Request Introduction

A large portion of any ILL office's time is spent working on producing new borrowing requests. One of the two programs in the basic ILL package, ILL Request, is devoted entirely to this process. The goal of this process is, in short, to do the following:

1. Gather data about new requests from a variety of sources without requiring staff to re-type the data.

2. Allow staff to view the requests and check local holdings to see if the items might be available locally.

3. Allow staff to check holdings for consortia, and locate potential lenders.

4. Provide staff with a variety of request routing options and automatically handle transmitting the requests to whichever source the staff chooses for each request.

This is what is generally called a "mediated request" system. Patrons submit requests to their local ILL staff and then the staff has a chance to review the requests and decide what to do with them. It can also operate in a nearly unmediated fashion by simply reading in the requests and immediately forwarding them to OCLC or whoever is your default supplier. The priority here is to do all this as quickly as possible while minimizing the amount of typing and/or paper involved.
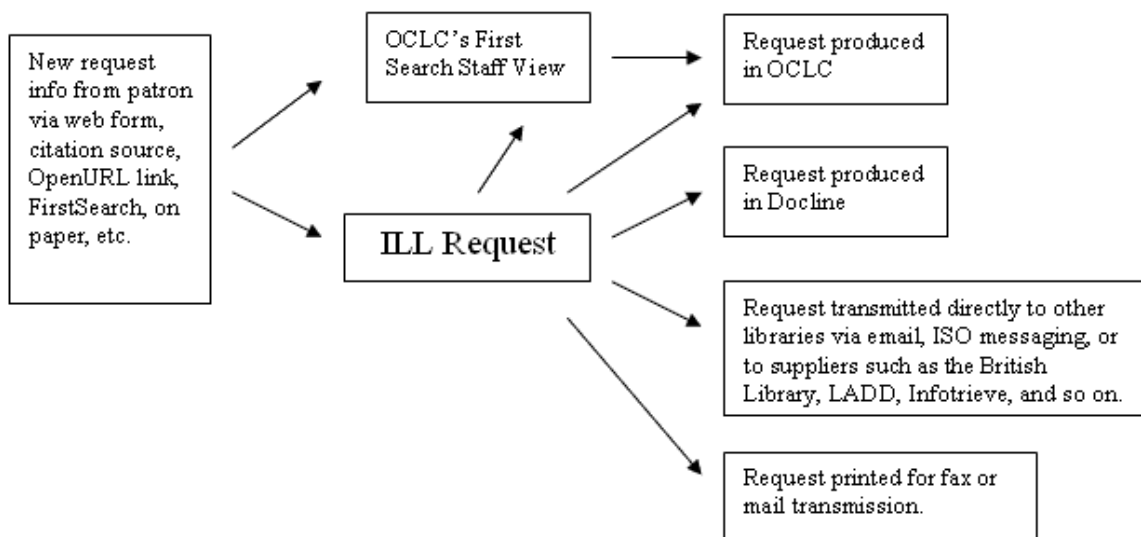
Figure 7.1. ILL Request as the Hub

As seen in Figure 7.1, "ILL Request as the Hub" (page 7–1), ILL Request can serve as the hub for new borrowing requests coming in through a variety of means and going out to all sorts of different providers.

Key points include:

• ILL Request is a mechanism for gathering new request data from a variety of sources into a single queue for processing by the ILL staff.

• ILL Request works by reading emails from a web page or by library staff entry.

• The format of those emails needs to be consistent. ILL Request needs to know what to expect to find in

those emails. This is done using the "Setup Email Field Names" option in ILL Request's Options menu.

• You may want to configure ILL Request on different computers to read differently formatted kinds of emails. For example, you might have ILL Request set up on one machine to read emails coming from your own Web form and OpenURL resolver while another machine is set up to read emails coming directly from any citation sources that aren't able to send OpenURLs.

• ILL Request is to be used for requests that pass through you. ILL Request will have no involvement with requests produced directly by your patrons themselves using systems like OCLC's WorldCat. ILL Request is only involved with requests that travel first from your patrons to you and from you on to the outside world.
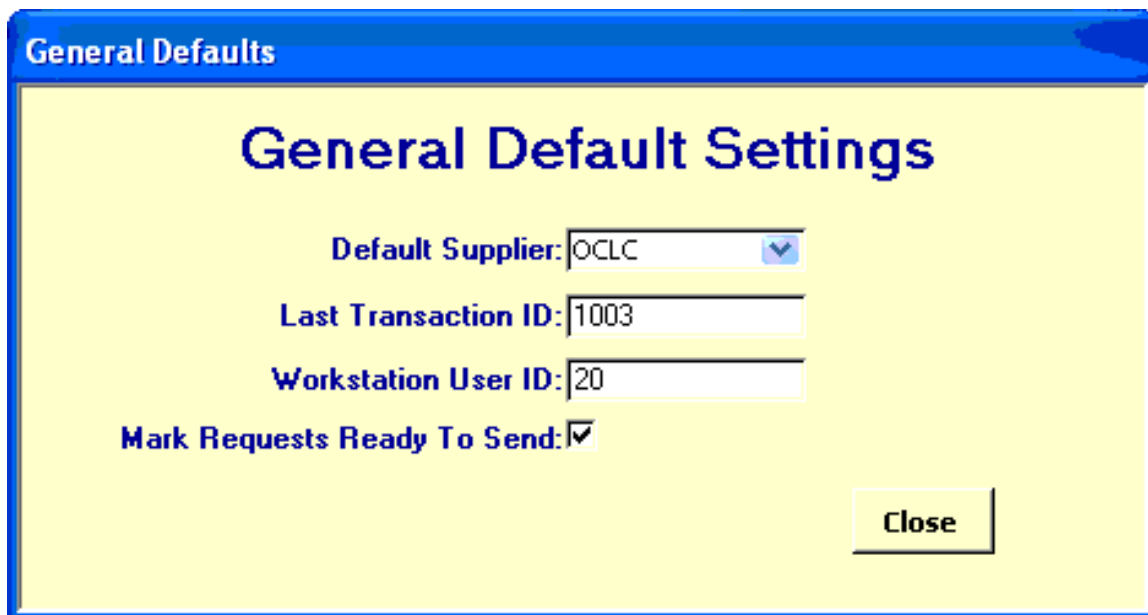
The Main screen in ILL Request, shown below, provides access to all of the functions you need to gather, review and forward new borrowing requests to OCLC, the British Library, Docline, directly to other libraries or to a number of other locations we will discuss later.

Figure 7.2. ILL Request Main Menu

7.2. Basic Setup

Most libraries process most requests in one way, e.g., send to OCLC. ILL Request allows you to set some defaults for all of your incoming requests so that they are ready to be sent to your usual ILL service. To set this up, go to the Options Menu and select General Defaults. The screen shown in Figure 7.3, "General Default Settings" (page 7–3)l displays.

Figure 7.3. General Default Settings

You have several choices for Default Supplier. The most common are OCLC and Docline and the British Library. Select the one you use most often and ILL Request will automatically flag each request to be sent to that ILL Service. ILL Request can also mark all requests ready to send automatically.

It is important that the value chosen for Workstation User ID be different on each workstation in your office where ILL Request is installed.

If you use OCLC as one of your ILL services, you will need to select the Setup OCLC Service Information option and enter some information about how you use OCLC. This screen is shown in Figure 7.4, "Supplier Info - OCLC Service Information" (page 7–4).

Figure 7.4. Supplier Info - OCLC Service Information

Do not change the OCLC IP Address and Port values. They need to be isoill.oclc.org and 499, respectively. Enter your OCLC Authorization, password, symbol and institution name. ILL Request will also fill in default values for max cost, IFM, CCC, need by date and borrowing notes. You have three choices for a default service when you send request to OCLC with ILL Request:

- Direct to Review - this option will cause a request to be sent to your Review File

- Direct to Profile - this option will cause a request to be sent to OCLC and processed according to your Profile at OCLC

- Direct to Lender - this option will cause OCLC to send a request directly to the lender or lenders that you specify

You can set your default Ship To, Ship Via and Billing addresses from the Options/Setup My Addresses menu. This screen will appear:

Figure 7.5. Setup My Addresses

7.2.1. Staff ID Settings

In order to assist users in sharing the now centralized request database, ILL Request has a new feature which allows staff members to identify requests that they are working on or to assign requests to others. A new column has been added to the Summary screen along with a drop-down box to allow selecting the user/staff ID. See Figure 7.6, "Request Summary" (page 7–5).

Figure 7.6. Request Summary

A new menu item has been added to allow staff names to be customized, as shown in Figure 7.7, "Edit Staff Names Option" (page 7–6).
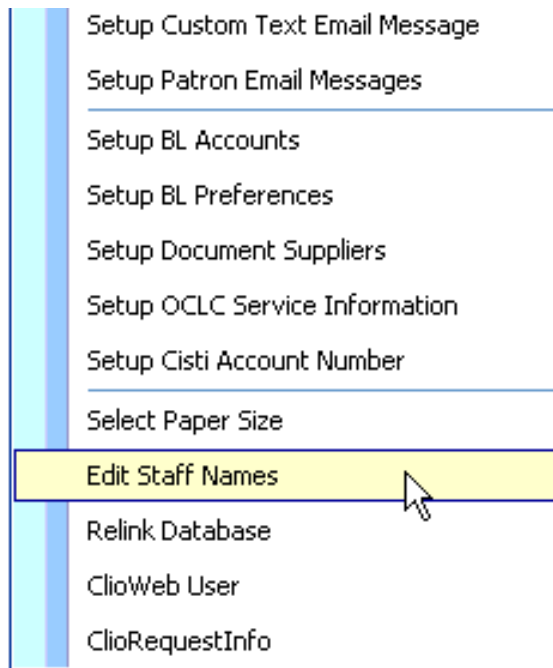
Figure 7.7. Edit Staff Names Option

Selecting this option presents the Edit Staff Names screen shown in Figure 7.8, "Edit Staff Names" (page 7–7).
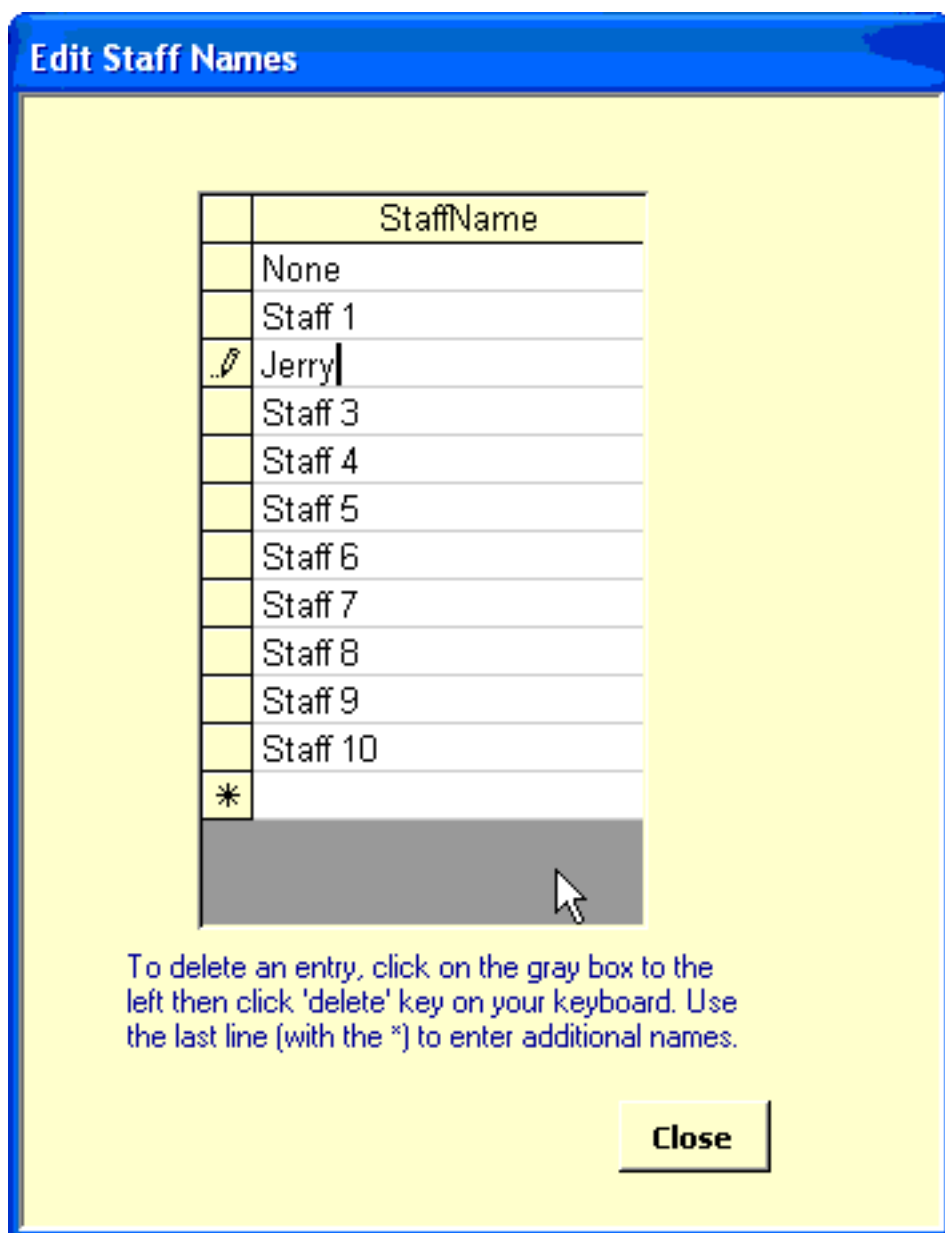
Figure 7.8. Edit Staff Names

Requests may be sorted on the Summary screen in ILL Request by the Staff ID by clicking on that column heading. The Staff ID may also be assigned on the Request Details screen.

7.3. Getting New Requests into ILL Request

That's all well and good, but how do those requests get in to ILL Request in the first place, and where do they come from? Good questions. ILL Request gathers new requests via email. Emails can come from your own ILL-request web forms that your patrons fill out by hand, or they can be delivered in a semi-automated way from online citation sources that your patrons can access. Email is a great medium for this kind of communication. Whatever the source or mechanism, what ILL Request is looking for is one email per new request. Let's take a look at some examples.

7.3.1. Example 1: Your Own New ILL Request Web Form

Most of our customers have at least one page on their website that contains a form that patrons can fill out to initiate a new ILL request. Patrons gather bibliographic data about the things they want and fill out these forms with that data along with data about themselves. When they submit these forms, an email containing all the data is sent to an email account used by the ILL office. ILL staff can gather these new requests a few times a day using ILL Request. When they click on the Get New Borrowing Requests button on ILL Request's Main screen, ILL Request looks for new emails for this account and gathers all the data contained in any new request emails it finds.

This arrangement is presently the most commonly used by our customers. It's nice in that it "lets your patrons do the typing" of all that bibliographic and personal info, but the drawback of course, is that patrons are not the most reliable of typists nor are they the most knowledgeable about exactly what things like ISBNs are. In most cases, however, enough information comes through to get the job done.

7.3.2. Example 2: Email from an Online Commercial Citation Source

Many of our customers provide access for their patrons to citation sources like EBSCOhost or WorldCat. Many of these citation sources or perhaps your own OPAC can provide customizable "request this item via ILL" links as part of each citation listing. Usually when a patron clicks on one of those links, an email is sent to an address that you can specify with your citation source provider. Naturally, this would be the email account that you will be checking with ILL Request. Just as it can read emails coming from your own web pages, ILL Request can read in emails generated by citation sources.

The benefit to this method is that the bibliographic data relayed to you by the citation source provider is likely to be more accurate and complete than things typed by patrons. The downside is that the format of these emails can be somewhat inconsistent and email from different providers will almost certainly be quite different from each other and from the emails generated by your own web forms. These difficulties can be handled, but they add some complication to the whole process.

7.3.3. Example 3: Information Passed by an OpenURL Link

The OpenURL standard is a wonderful addition to the library world and is tailor-made for the business of generating new ILL requests. The situation described in the previous example can be revised to have an OpenURL link to your institution's own OpenURL resolver instead of generating an email at the point where a patrons wishes to request something via ILL. If your resolver can't find the requested item in any local resource, the next step would be to pass that data on to the ILL department. This information would be sent in email, and from there into ILL Request, just as in the previous examples.

ILL Request needs to be told some basic information about your email servers and about the format of the email messages that your web page sends. See the Appendix for a description that details how to configure ILL Request to read your particular email formats. Once you have configured ILL Request to properly read and gather information from the emails sent to it as described in the Appendix, you can get started reading in actual new ILL request emails by clicking on the Get New Borrowing Requests button on ILL Request's main screen. ILL Request will check your email account's inbox and tell you how many new requests it read.

There is actually one other method of entering a request into ILL Request - the Manual Entry screen. Click the Manual Entry button on the Main screen and you can enter a request by typing in the details.

7.4. Reviewing New Requests

Now we can take a look at the request data that ILL Request gathered. Click the View Borrowing Request Summary button on the Main screen to move to the Request Summary screen.
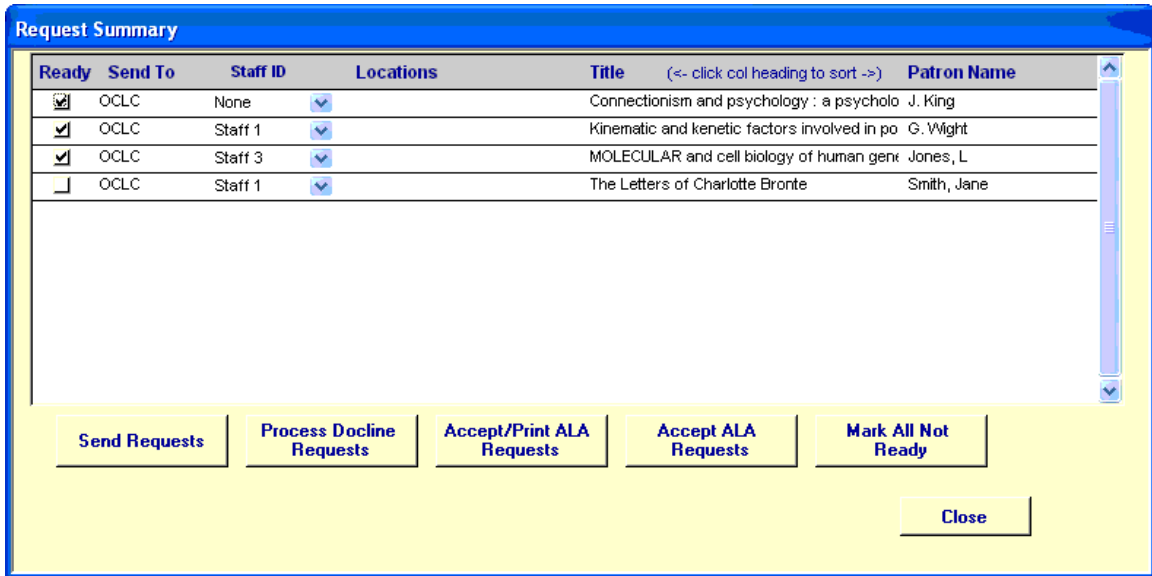
Figure 7.9. Request Summary - New Requests

In this screen you will see a one-line summary for each email message that was read. The first column on this screen is the "ready to send" indicator. The second column shows the routing option selected for each request. The third column displays the Staff ID (see below). The fourth column displays the Locations that the request will be sent to, if any. If you double-click anywhere in the summary line for one of the items on the summary screen, you will move to a screen displaying all the details for that request as shown below.

Staff ID Values:

In order to assist users in sharing the now centralized request database, ILL Request has a new feature which allows staff members to identify requests that they are working on or to assign requests to others. A new column has been added to the Summary screen along with a drop-down box to allow selecting the user/staff ID. See Figure 7.10, "Request Summary - Select Staff ID" (page 7–9).
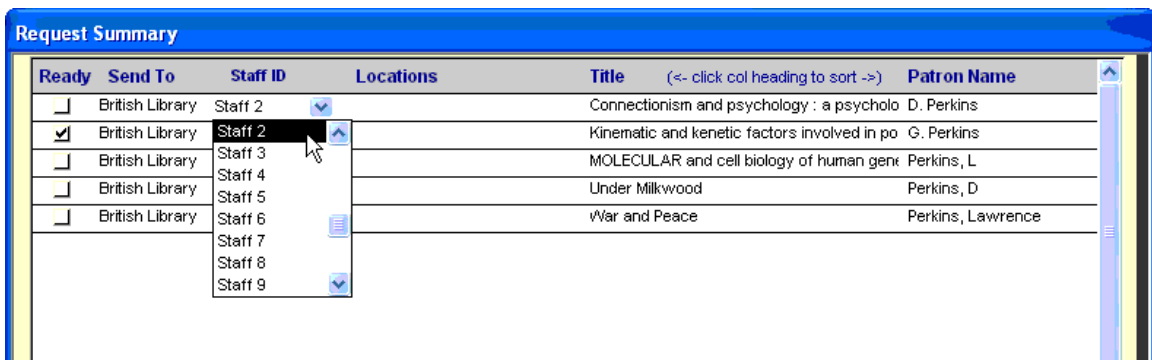
Figure 7.10. Request Summary - Select Staff ID

7.4.1. Request Details

The Previous and Next buttons at the bottom of the details screen (see Figure 7.11, "Review Details" (page 7–10)) allow you move through the current 'inbox' of requests shown in the Request Summary screen. If you plan to review the details of every request, you may want to select the first new request on the sum-

mary screen and then scroll through all of the new requests. You may edit any field displayed on the detail screen. Put your own notes after the four slashes ('////'). ILL Request puts any "Pickup Location" information you choose to include with your request in this field. ILL does have a field in its database for this information for each borrowing request and looks for it in PatronNotes when information about new requests produced with ILL Request comes back to you from OCLC.

Figure 7.11. Review Details

At this point, you can see all of the data that ILL Request gathered from a single email about a single new borrowing request. You might delete requests that are obviously inappropriate or pranks, or you might do a little bit of investigation to gather more bibliographic data.

ILL Request also shows you the number of previous requests for the same title that you've made in the past year. See Figure 7.12, "Review Details - Number of Previous Requests" (page 7–10).
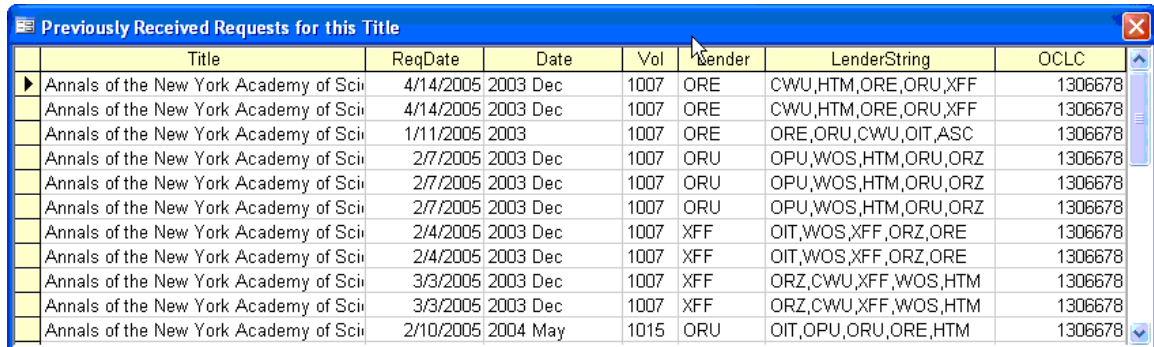
Figure 7.12. Review Details - Number of Previous Requests

This can be helpful if Copyright Compliance fees are a concern. In this case the number has been changed to red indicating that more than 4 requests have been made for this title this year.

The button to the right of the title will launch a small window that will show you more details about your previous requests for the same title. See Figure 7.13, "Previously Received Requests for this Title" (page 7–11).

Figure 7.13. Previously Received Requests for this Title

This shows you all of the previous lenders who supplied this title and the volume they held. In addition, you see the OCLC number for this title. You can copy this and paste it into the details screen to expedite processing later. You might also choose the OCLC Direct to Lender option. See the section on Sending Requests to OCLC for more information on OCLC options.

New in 6.0 - Patron Name and Pending Requests Added:

By request from our customers, we have added patron name information for each item shown in the list of previous requests for the same item. See Figure 7.14, "Patron Name Information Added" (page 7–11).

Figure 7.14. Patron Name Information Added

This list also includes any pending requests for the same item. Previously, pending requests were not included in this list, only requests that had been around long enough to move past the pending status.

7.4.2. Check Local Holdings

ILL Request allows you to check your own local holdings to see if you hold any item requested by a patron before routing requests. If you do hold an item, you can immediately email the patron that requested it to tell them so and cancel the request.

This feature requires that you have a Web-accessible OPAC system. This function uses the setup information entered in ILL for searching your OPAC for new lending requests. When you click the Check Local Holdings button on the Request Review Details screen, ILL Request searches your OPAC based upon the title of the item. The Check Holdings dialog box opens. See Figure 7.15, "Check Holdings" (page 7–12).

Figure 7.15. Check Holdings

In Figure 7.15, "Check Holdings" (page 7–12), the item requested by a patron is held locally. Clicking the Email Patron button (see Figure 7.16, "Patron Email Button" (page 7–13)) launches a small window that lets you email the patron to tell him that he doesn't need to use ILL to get this item.

Figure 7.16. Patron Email Button

Figure 7.17. Patron Email

You may use the Print Bib Details button (see Figure 7.18, "Print Bib Details Button" (page 7–14)) to print information that may be used as a pick slip in order to verify that the locally available item is on the shelf.

Figure 7.18. Print Bib Details Button

Once you have verified that the item is locally available and sent an email to the patron, you may delete the request and move on to the next one.

If you want to maintain a record of requests that were returned to the patron because the material was locally available, see the Appendix for more information.

The default text of the message to the patron is set using the Options/Setup Patron email message menu item. See Figure 7.19, "Supplier Info - Patron Email Messages" (page 7–15).
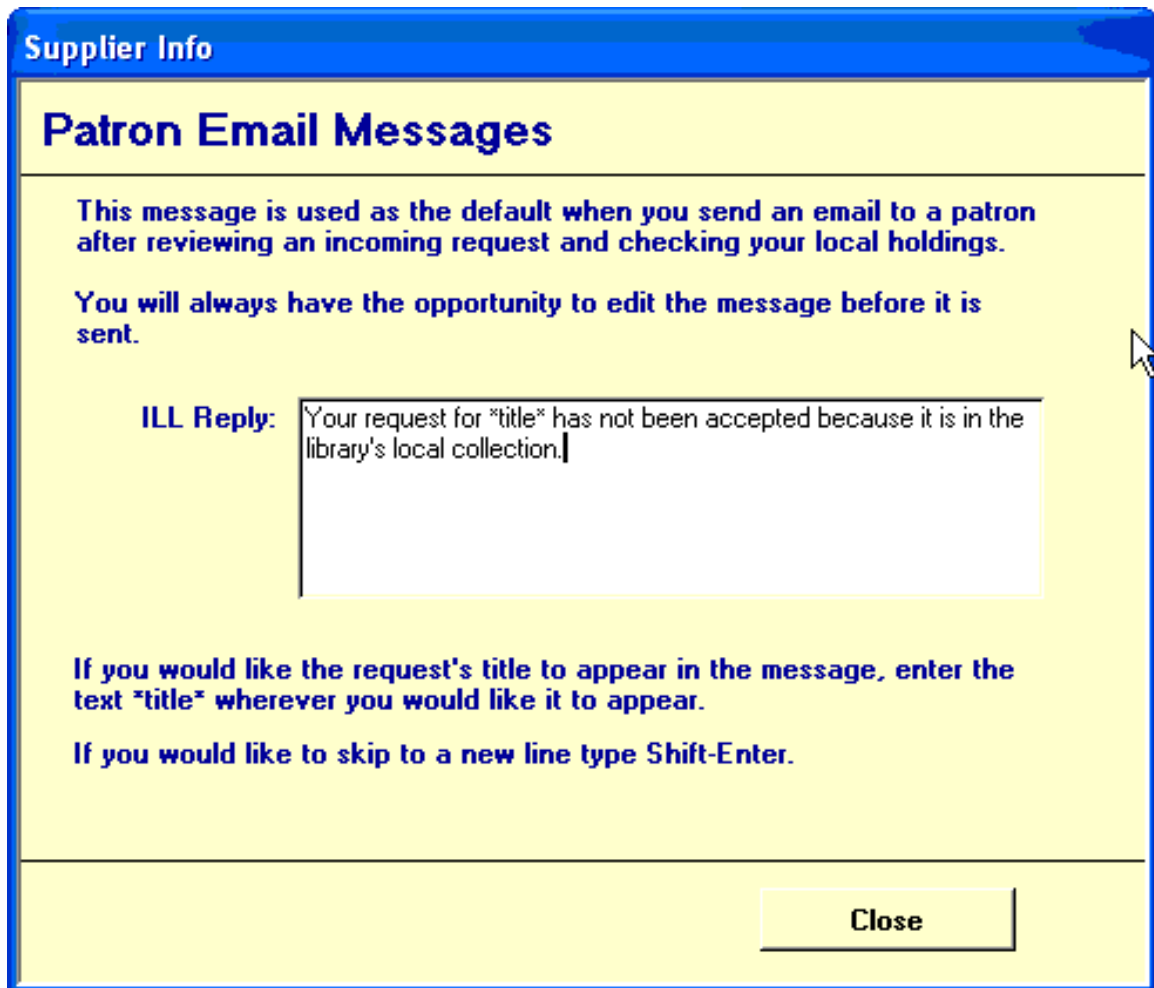
Figure 7.19. Supplier Info - Patron Email Messages

7.4.3. Checking Other Holdings

You might have noticed a "URL" drop-down menu at the top of the Check Holdings window. See Figure 7.20, "URL Drop-Down Menu" (page 7–15).
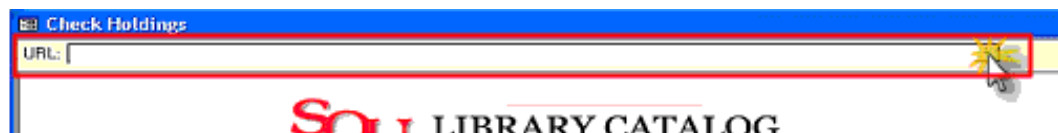
Figure 7.20. URL Drop-Down Menu

This feature allows you to check not only your own holdings, but also the holdings of any other Web-accessible catalog you wish. People often use this to check union catalogs for a local consortium that they belong to or the holdings of large nearby lenders. Often these resources provide the ability to request items

directly, eliminating the need to place the request via a system like OCLC or Docline that might charge per-request fees. This can mean large time- and money-savings for many ILL departments. With the advent of ISO library-to-library communications, this kind of find-and-request-things-yourself way of doing things is becoming more and more useful for many ILL customers. In addition, searching other catalogs may provide you with enough information to use the DirectToLender service with OCLC requests.

You can set the list of entries in this drop-down list. Select the Options/My Bor Partners menu item. The screen similar to the ones shown in Figure 7.21, "My URLs Example for Classic WebVoyáge" (page 7–16) or Figure 7.22, "My URLs Example for Voyager 7 and Higher" (page 7–16) display.

Note

The format of the URL search string is different for environments using WebVoyáge Classic versus WebVoyáge 7 and higher.

Figure 7.21. My URLs Example for Classic WebVoyáge

Figure 7.22. My URLs Example for Voyager 7 and Higher

You may cycle through the list and add new MyURLs entries.

Procedure 7.1. Adding Entries for My URLs

To add new entries:

1. Click the end of list arrow with the asterisk. See Figure 7.23, "New Entry Arrow" (page 7–17).

Figure 7.23. New Entry Arrow

Result

This takes you to the first open entry past the last entry in the list.

2. Enter the URL, SearchStringTitle1, and SearchStringTitle2 information.

Result

The system automatically saves the information.

3. Click Close when you are finished.

7.4.4. Sending Requests to OCLC

Once you've decided to go ahead and produce a particular request, you need to decide where and how to send it. Most of our customers use OCLC for the vast majority of their requests, so that's where we'll start.

Request routing is set for each request on the Review Details screen. When you select OCLC as your Supplier, there are additional service options you must select. See Figure 7.24, "OCLC Service Option Selections" (page 7–17).
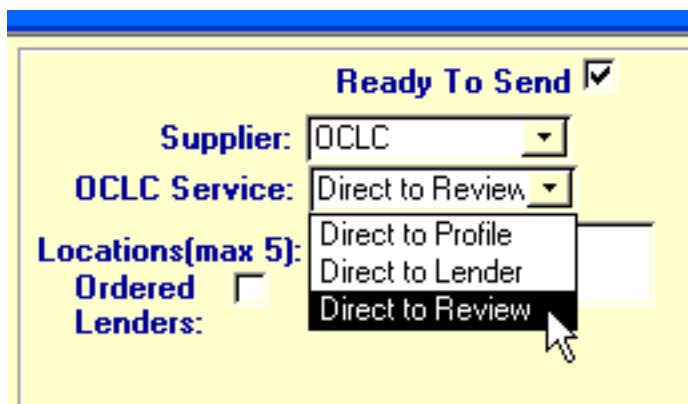
Figure 7.24. OCLC Service Option Selections

The Service menu shown above shows the three basic options you have when sending requests to OCLC.

• Direct to Review - this sends the request to your Review file at OCLC. This is the option most of our customers use most of the time. Sending requests to the Review file gets all of the bibliographic and patron information for new requests to OCLC but doesn't actually produce a request. This is the most practical thing to do since frequently you won't have an OCLC number at this point and may not have a correct ISBN or ISSN. Getting the data to the Review file allows you to log in to OCLC's website later where you can quickly perform a search, find and apply a particular OCLC item number, and produce the request with a few mouse-clicks for each request.

- Direct to Profile - this sends the request to OCLC and routes the request, if possible, according to the Profile and Custom Holdings you have set up at OCLC. The request must have either a valid OCLC number or ISBN number. If the request cannot be routed for any reason, it will be placed in your Review file.

- Direct to Lender - this choice allows you to enter a Lender string in ILL Request. OCLC will route the request accordingly. You must enter valid OCLC lender symbols into the Locations field and the Verified field must have the appropriate information.

Once you have reviewed a batch of new requests and are ready to send some of them to OCLC, return to the Request Summary screen (by clicking the Close button on the Review Details screen) and click the Send Requests button. ILL Request will logon to OCLC then send the requests marked ready to OCLC. You will receive a message indicating how many requests were sent.

> **Note**
>
> ILL Request makes NO ENTRIES in your ILL database about requests sent to OCLC. OCLC requests will be transferred into ILL when OnlineProduced, DirectProduced and Unfilled messages are downloaded from OCLC using ILL's OCLC communications capabilities.

Viewing the status of requests sent to OCLC:

When you use ILL Request to send requests to OCLC, two types of messages may be returned from OCLC. These messages can be viewed by clicking the View Status button on ILL Request's main screen. The ILL Answer message generally describes why a request was sent to the Review file. This could be because that was how the request was routed, or it could be because the request was routed to the Direct to Profile service, but there was no matching Bib record. The Status message can indicate that there was a more serious problem with the request, such as an invalid lender symbol. There is a 'Clear' button on the screen to clear out these messages.

7.4.5. Sending Requests to Docline

Sending requests to Docline can be done in three ways, which we will call the Docline-direct way, the built-in way, and the other way. Here's how to do all of these methods in that order.

The Docline-Direct Way:

The way ILL Request works with Docline is best illustrated by what we call our Docline Direct method. This method makes a lot of sense if you already have PMID numbers for the items you want to request. If you're going to be searching PubMed to find those PMIDs, you might as well let ILL Request help you do that by using our Built-In Way, described next. But for now, let's assume you have correct PMID values for all new borrowing requests.

Clicking on the Docline Direct button on ILL Request's Main screen opens a new window with an embedded web browser in it. ILL Request automatically logs you in to Docline, where you can proceed with producing borrowing requests in the batch manner that Docline provides. That is, if you have one patron that is requesting several things at the same time and you have the PMID numbers, you can produce all of those requests at once. At the end of each batch of request-producing, ILL Request will gather all the data about each new request and put it all into your ILL database.

Procedure 7.2. Docline Direct

1. Navigate to Docline's Requests - Borrow - UniqueKey screen, as shown:

Figure 7.25. Requests > Borrow > UniqueKey

2. Enter a batch of PMID numbers that a single patron is requesting and proceed to order the items, as shown above. When you reach the end of the series of forms you need to fill out and are essentially "done", there's one more thing to do: click on the "Full Display" button as shown below:
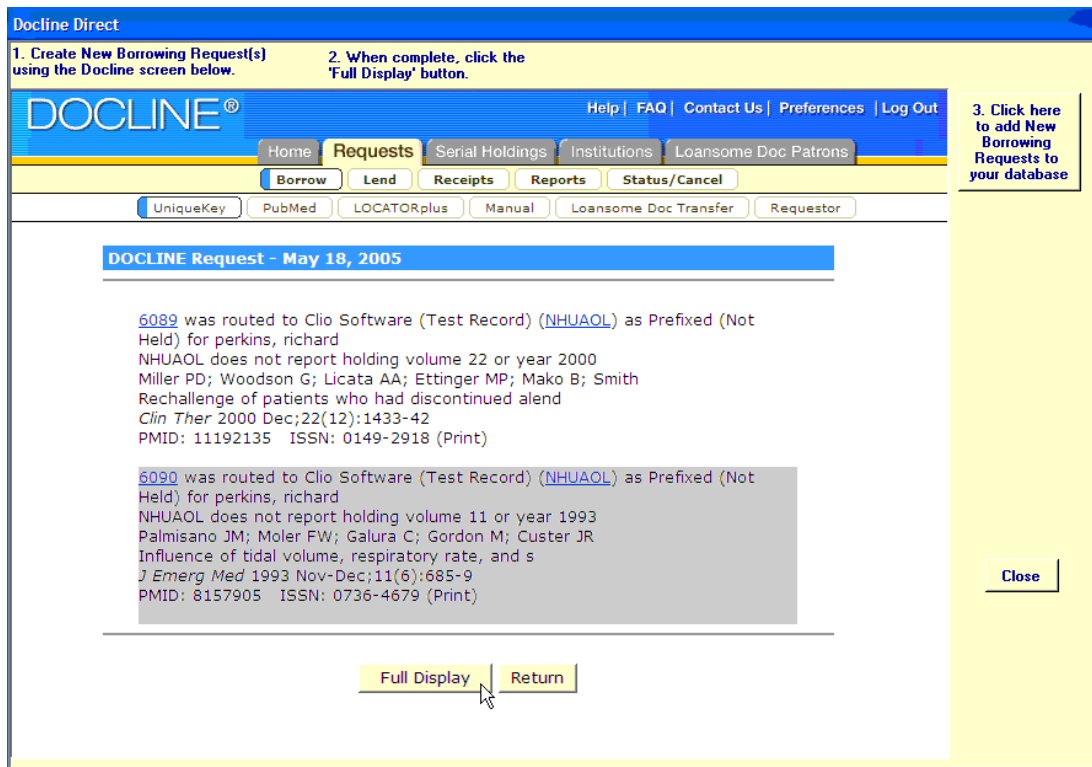
Figure 7.26. Full Display Button

3. Docline will then give you a whole screen full of data about all the requests that you just produced. All you need to do then is click on the big button on the right side of ILL Request's window. ILL Request will parse all of the data from the page that Docline is showing you and add everything about those new requests to your database.

Figure 7.27. Docline "Click here ..." Button

4. Go back to the beginning of this process and repeat for each patron for whom you need to request things.

The Built-In Way:

This method is best for people who have to do some searching in the PubMed database to find each item's PMID number before producing a new request. If you always or often have the PMID already in your new-request data, you might want to use the "Docline-direct Way" described above.

ILL Request can help you produce new Borrowing requests in Docline while searching the PubMed database in a mostly-automated way. If you select Docline as the Supplier on the Review-Details screen, ILL Request will prepare that request for your next "Produce New Requests in Docline" session. In Figure 7.28, "Supplier Set to Docline" (page 7–22) an item with its supplier set to Docline.

Figure 7.28. Supplier Set to Docline

Next, it's time to go back to ILL Request's Summary screen and click the Docline button. A now-familiar embedded-browser window will open and you will be logged in to the Docline website automatically. From Docline's home page, navigate to the PubMed search screen, as shown in Figure 7.29, "PubMed Search" (page 7–22).

Figure 7.29. PubMed Search

The idea here is that ILL Request will help you find the exact citation you are looking for, initiate the request and then store the relevant request data (including the all-important ILL number) in ILL's database. To do this, use the citation data displayed at the top of the screen to perform a search in PubMed to find the item your patron is looking for. Initiate a request from that point as usual, as shown in Figure 7.30, "Locate Citation with PubMed" (page 7–23).

Figure 7.30. Locate Citation with PubMed

Once you have finalized the request, click on the "Full Display" button as shown in Figure 7.30, "Locate Citation with PubMed" (page 7–23). Once the full display of data is visible, click the big button on the right side of the ILL Request window and all the data about your newly produced request will be entered into your database. You can then click on the arrows at the top of the screen next to the bibliographic data display to move on to the next item waiting to be requested. Go though them all one at a time and read in the "Full Details" for each one. The benefit to this method is that you can do it all within a single window and gather all the data at the end of the process into your local ILL database for later use. If you have to search PubMed anyway, you might as well do it this way.

The Other Way:

We never thought of doing things this way; it was ILL users who figured out that this method would work.

This method doesn't involve ILL Request at all while searching for and producing new borrowing requests. Simply use Docline in a Web browser as usual. Then at some point later, you can use ILL Request's Docline Direct feature to log in to Docline. Once there, use the Requests - Status/Cancel screen to get the same Full Display of information for each of the requests you produced with Docline. At that point, you can click the big button on the right side of the screen to read all the data into ILL's database. See Figure 7.31, "Docline Status/Cancel" (page 7–24).

Figure 7.31. Docline Status/Cancel

7.4.6. Sending Requests to the British Library

A number of improvements have been made to ILL Request in our 6.0 version relating to sending requests to the British Library. For example, ILL Request now provides the option to have items emailed directly to patrons for requests sent to the British Library with Ship Via set to Secure Electronic Delivery (SED). If the 'Email to patron' check box is selected, the patron's email address will be included with the request. See Figure 7.32, "BL Email to Patron" (page 7–25).

Figure 7.32. BL Email to Patron

Series data is included when sending requests via text email or the ARTEmail system to the BL.

7.4.7. Email and ALA-Form Requests

On the Review Details screen, there are several Supplier options in addition to OCLC and Docline. When you select Library as your Supplier, you may email a request directly to another library, send the request via ISO messaging (explained next), print out an ALA-form request, or just save the request data in ILL's database.

ALA requests may also be entered manually in ILL via the Prepare ALA Form button on the Main screen.

Choosing the "ALA Form" routing option in ILL Request means "I'm going to deal with this request outside of the automated systems like OCLC or Docline", whether or not you actually print out and fax an ALA-form request to a lender. A record is created in ILL's Borrowing Requests table for each ALA-type item (unlike OCLC requests). These requests are automatically assigned negative ILL numbers by ILL to distinguish them from OCLC or Docline requests and to be sure that there is no way any ILL assigned ID number could conflict with an OCLC- or Docline-assigned one. When this option is selected you select a lender symbol that is supplied from your ILL Library Database. You might choose to create a "fake" library record in your database to use to keep track of certain types of requests in ILL using this method. For example, you might create a library record for "locally -held items" that you assign all such requests to instead of deleting them. You could then do reports in ILL based on just that library symbol to see how many requests for locally-held items you are rejecting.

If you have chosen ALA Form for any requests, you may click either the Accept/Print button or the Accept button on ILL Request's Summary screen. In both cases the requests will be added to your ILL database with an automatically generated negative ILL number. If you click Accept/Print, an ALA form will be printed for you to fax or mail to lenders.

Emailing requests to other libraries is something you would need to arrange ahead of time with lenders. The emails that ILL Request sends contain the same information that a standard printed ALA-form request does and so are easily dealt with by most lenders. All that is required for this to work is:
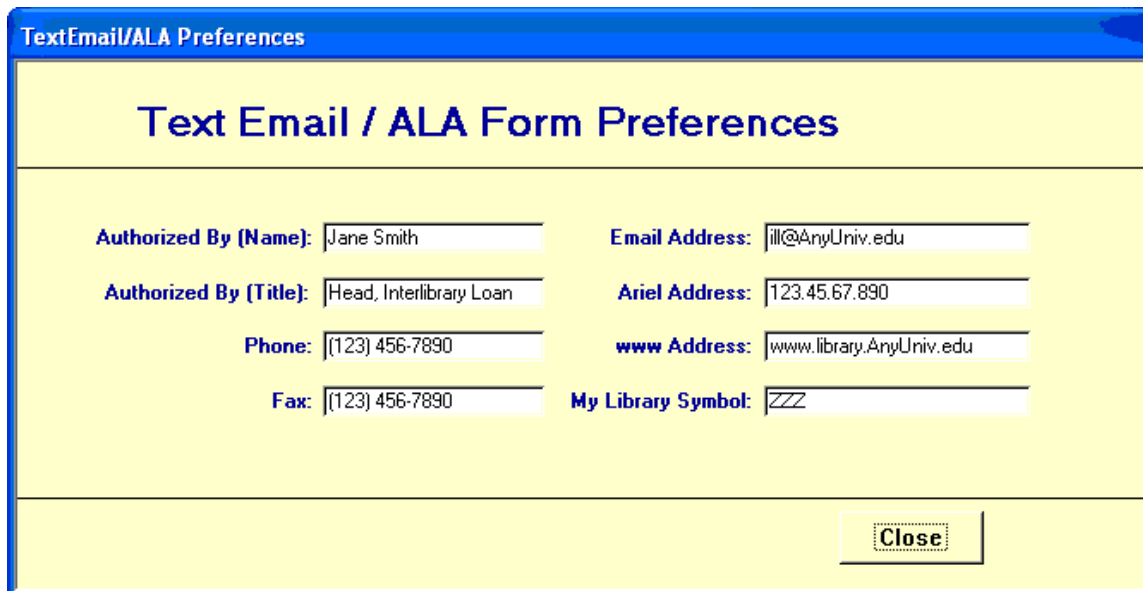
1.   You need to know the library to which you want to email the request.

2.   You'll need an email address for that library where they will be expecting to receive ILL requests.

ILL Request provides you with all of the libraries in ILL's database to choose from at this point. If an email address is already in the database for a library, ILL Request supplies it for you. This feature is often used by hub-and-satellite-branch public library systems that route requests from a host of small satellite library branches through a central processing location.

You set default values for many of the fields on an ALA form using the Options/Setup Text Email/ALA Preferences menu item. This screen is accessible in both ILL Request and ILL. See Figure 7.33, "Text Email/ALA Form Preferences" (page 7–26).

Figure 7.33. Text Email/ALA Form Preferences

7.4.8. Sending Requests to Document Suppliers

If you use certain document suppliers on a regular basis and they will accept orders for documents via email, you can use ILL Request to send them. You provide the details concerning the suppliers by selecting the Options/Document Suppliers menu item. Fill in the details on the screen shown in Figure 7.34, "DocSuppliers" (page 7–26).

Figure 7.34. DocSuppliers

You can then choose DocSuppliers as the Supplier and select the particular one you want for that request.
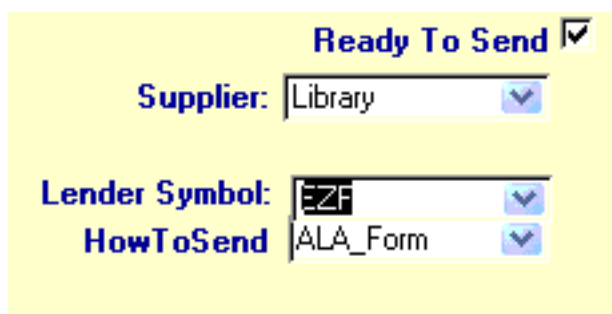
7.5. Maintaining a Record of Requests That Were Returned to the Patron Because They Were Locally Available

Some institutions wish to maintain a record of such requests for statistical purposes or for patron status inquiries.

Be sure you have created a symbol for your own library as described in the previous section.

In ILL Request: on the Check Local Holdings screen, after you have sent the bounce back email to the patron:

- Change the Supplier to Library. Select your own institution symbol from the drop down list for the lender symbol.

- Select ALA Form in HowToSend. See Figure 7.35, "HowToSend" (page 7–27).

Figure 7.35. HowToSend

- Return to the Request Summary. Select the Accept ALA Request option.

- In ILL, update the request to Cancelled with a note in the Borrowing Notes area giving the reason for cancellation.

7.6. Maintaining a Record of Requests That Have Been Canceled Before They Were Produced in OCLC

Some institutions wish to keep a record of requests that were sent to OCLC's review file but cancelled before a record was produced.

In order to use ILL to keep records for cancelled review requests you will need to have three things setup.

7.6.1. Setup

- Set ILL Request to not delete email requests from the server. This can be done by going to Options/ Setup Email Server Information then changing the option for Delete Mail from Server to No.

- Setup an email client like Microsoft Outlook to read the same email account. The application should be setup to read the account on demand, only when someone manually requests the email client to read the account. The email client should also be set to delete the email from the server.

- Setup a library symbol to use for statistical purposes. See the Appendix section, Adding a new Library to the Library Table, for an explanation regarding how to do that.

7.6.2. Processing Canceled OCLC Review Requests in ILL Request

- Read patron email requests into ILL Request.

- Using the email client described in the second bullet above, read the same messages in again. This step removes the original email requests from the mailbox. NOTE: This additional step must be performed every time patron messages are read. It is for you to decide if the statistics you can keep justify the extra work.

- Send email request to the Review file from ILL Request.

- When canceling a request in the OCLC Review file, make a note of the title and any other distinguishing information about the request.

- Open your email client and find the cancelled request.

- Forward the request to the usual patron email mailbox.

- Re-read the request into ILL Request.

- On the Borrowing Request Summary screen, find the request. Double-click on the request to open the Review Details window.

- Optional: To send an email to the patron notifying of the cancellation of the request, click on the Check Local Holdings button. Scroll down to the Email Patron button and select it. Once the Patron Email window appears, modify the email message. Close the Check Local Holding window and return to the Review Details screen.

- On the Review Details screen, change the HowToSend to ALA Form and enter the Library Symbol that you have designated for use with cancelled Review Requests. See Figure 7.35, "HowToSend" (page 7–27).

- Close the Review Details window. On the Borrowing Request Summary screen, Select the Accept ALA Requests button.

7.6.3. Processing Canceled OCLC Review Requests in ILL

- Open ILL. Go to Borrowing. Select the Search Borrowing Request button. In the lower portion of the display, the first request in the list should be the one just processed in ILL Request. Highlight the negative ILL number and click on the key combination [Ctrl]+ C to copy the ILL number to the clipboard.

- Return to the Borrowing Main menu then go to the Update Borrowing Request window.

- Select the Cancelled option then with your cursor in the ILL text box select the key combination [Ctrl] + V to paste the negative ILL number into it. Click Accept once.

- In the Borrowing Notes text box enter the reason that the request was cancelled. Click on the Accept once more to complete the update.

Chapter 8. ILL Management Configuration

8.1. Overview

ILL Management is a software application that helps you manage Interlibrary Loan transactions in your library. The benefits of using this software include the following:

- Streamlining your interlibrary loan workflow

- Creating a local, permanent, up-to-date database of interlibrary loan requests of all types

- Tracking the status of any request

- Generating relevant reports and statistics

As you send or accept ILL requests through ILL Request, you are actually saving all the information being processed into your own local database. As a result, the information becomes immediately available for you to search and update, as well as collect various pieces of the information for statistical and reporting purposes.

There are actually five databases that can be used with this software:

- Borrowing Request database - all the information contained in the requests that you send for an item that some other institution owns.

- Lending Request database - all the information contained in the requests that you receive for items your institution owns.

- Invoice database - any bills or account statements you create and send out.

- Library database - all the libraries you deal with as a Borrower or a Lender will have library records in this database. Library records contain information such as contact names, addresses, and phone numbers, usual billing arrangements, loan and copy charges.

- Patron database - you can keep and maintain as much (or as little) information as you want. However, Voyager libraries typically use the Voyager patron database and Circulation module for this purpose. They also use the Voyager Circulation module to create brief bib, holdings, and item records for the borrowed item and then charge the item to the patron. This allows you to create Circulation notices such as overdues and recalls based on the circulation policies that apply to interlibrary loan items. Let Voyager do the work for you.

All of the databases use the Microsoft Access database format. There are a wide range of reports and statistics that can be created with this software. Since the database format is Microsoft Access, your special information requirements can be extracted from the ILL data tables.

8.2. Preferences

You can begin to streamline your interlibrary loan workflow by setting a wide variety of values used by ILL Management that customize its behavior. Setting these values appropriately can significantly reduce the effort required to perform routine operations. In some cases you can set default information. You can change the default information at any time during a session and you can override any default information that may appear while you are working in a particular area, such as an ALA Form.

- The procedure for setting general preferences is shown in Configuring General Preferences (page 8–2).

- The procedure for setting billing-related preferences is shown in Configuring Billing Preferences (page 8–9).

- The procedure for setting notices archives-related preferences is shown in Notices Archive (page 8–12).

- The procedure for setting customized notice-related preferences is shown in Notices Customize (page 8–15).

- The procedure for setting data directories-related preferences is shown in Re-link Database - Data Directories (page 8–41).

- The procedure for setting address-related preferences is shown in Updating Address (page 8–22).

- The procedure for setting ALA-related preferences is shown in Text Email/ALA Preferences (page 8–?).

- The procedure for setting patron-related preferences is shown in Configuring Patron Preferences (page 8–24).

- The procedure for setting branch-related preferences is shown in Branch ID (page 8–26).

- The procedure for setting email-related preferences is shown in Email Setup (page 8–27).

- The procedure for setting OPAC-related preferences is shown in OPAC Setup (page 8–28).

The following setup information must be set for each PC on which ILL Management is installed.

Procedure 8.1. Configuring General Preferences

Use the following to configure the General Preferences:

1.   Open ILL Management.

2.   Click Preferences and select General.

Result

The General Preferences dialog box opens. See Figure 8.1, "General Preference dialog box - Loan Charges selected" (page 8–3).
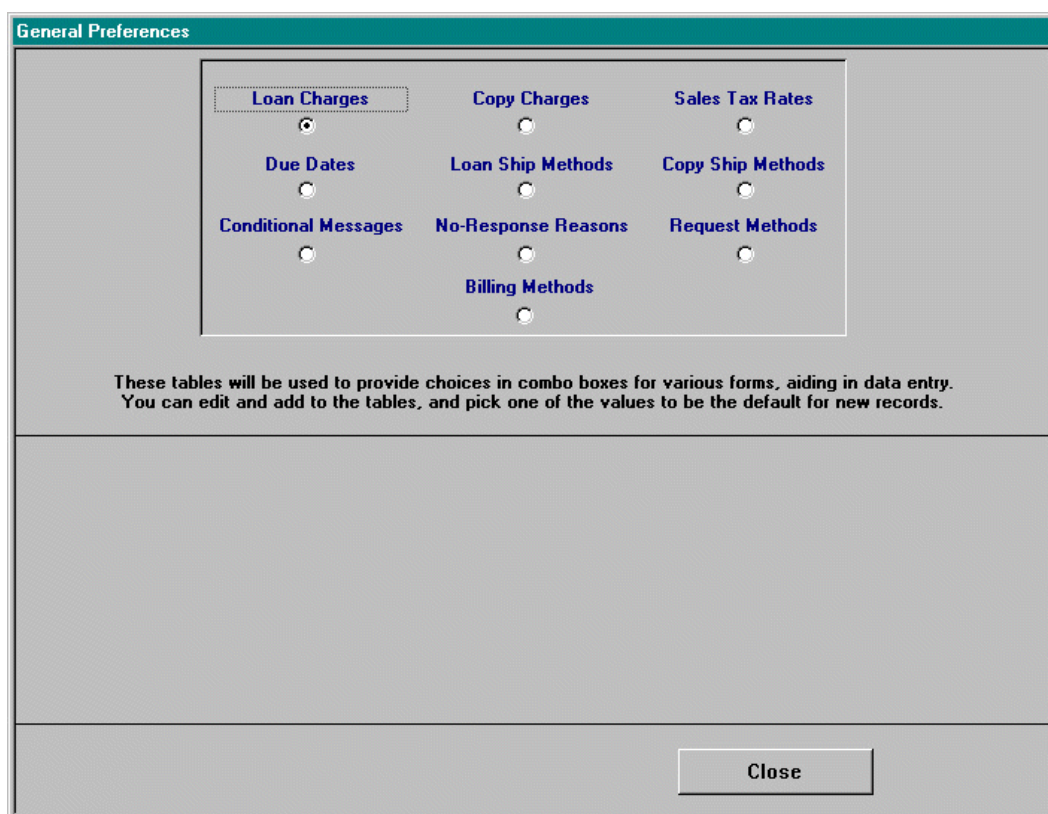
Figure 8.1. General Preference dialog box - Loan Charges selected

This dialog box allows you to set defaults for new library records, loan and copy shipping methods, methods by which requests are submitted or received, and so on.

3.   Click the Loan Charges radio button.

Result

The dialog box updates (Figure 8.2, "General Preferences dialog box - Loan Charges radio button selected" (page 8–4)) to include a list of values (dollar amounts) for loan charges.

You can edit and add to the list and you can choose a value from the list to set as the default for lending and borrowing. Any default charges are applied to the Loan Charge field for new library records. However, you can edit an existing library record at any time.

Result

Any dollar amounts specified here also display in the Loan Charges drop-down list on a library record.
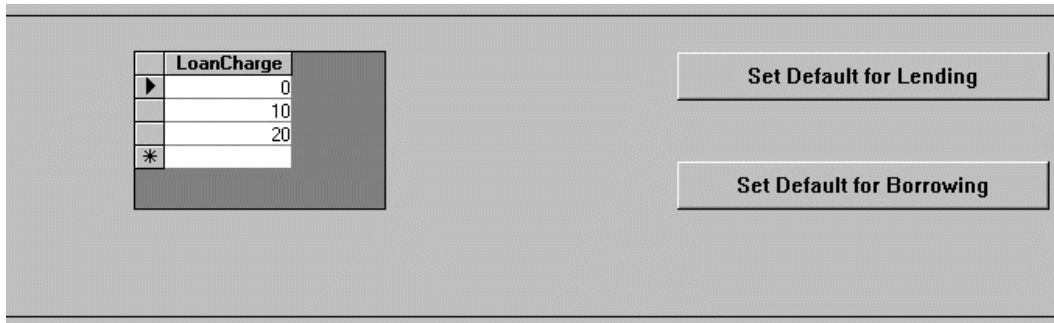
Figure 8.2. General Preferences dialog box - Loan Charges radio button selected

- To edit a dollar amount, highlight the dollar amount you want to change and enter the new amount.

- To add to the dollar amounts listed, place your cursor in the blank field at the bottom of the list and enter the new amount.

- To select a dollar amount on the list as the default for Borrowing or Lending, click the gray box in front of the default amount to highlight the entire field. Click the Set Default for Lending or Set Default for Borrowing button.

4.   Click the Copy Charges radio button.

    Result

    The dialog box updates to include a list of values (dollar amounts) for copy charges.

5.   Follow the same steps as described for Loan Charges. As with loan charges, if you set a default copy charge, it is applied to the Copy Charge field for new library records. Any dollar amounts specified here also display in the Copy Charges drop-down list on a library record.

6.   Click the Sales Tax Rates radio button.

    Result

    The dialog box (Figure 8.3, "General Preferences dialog box - Sales Tax Rates radio button selected" (page 8–5)) updates to include a list of values (sales tax rates) that might be added to lending charges.

    Any rates specified here also appear in the Sales Tax Rates drop-down list on a library record.
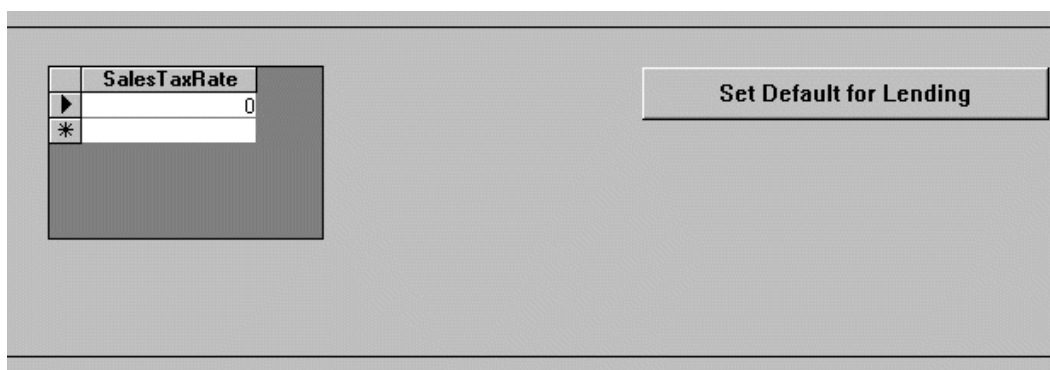
Figure 8.3. General Preferences dialog box - Sales Tax Rates radio button selected

- To edit a sales tax rate, highlight the rate you want to change and enter the new rate. A value of 0.07 represents a tax rate of 7%.

- To add to the tax rates listed, place your cursor in the blank field at the bottom of the list and enter the new rate.

- To select a sales tax rate on the list as the default for Lending, click the gray box in front of the default rate to highlight the entire field. Click the Set Default for Lending button. A default tax rate is applied to the Sales Tax Rate field for new library records.

7.   Click the Due Dates radio button.

   Result

   The dialog box updates to include a list of time periods (in days) that can be used to set due dates for items lent to or borrowed from a particular library.

   Any time period specified here also appears in the Due Date drop-down list on a library record.

   - To edit a due date, highlight the value you want to change and enter the new value. A value of 30 days calculates a due date thirty days from the date the item is received from the lending library or sent to the borrowing library.

   - To add to the time periods listed, place your cursor in the blank field at the bottom of the list and enter the new value.

   - To select the time period on the list as the default for Lending or Borrowing, click the gray box in front of the default value to highlight the entire field. Click the Set Default for Lending or Set Default for Borrowing button. A default time period is applied to the Due Date field for new library records.

8.   Click the Loan Ship Methods radio button.

   Result

   The dialog box updates (Figure 8.4, "General Preferences dialog box - Loan Ship Methods radio button selected" (page 8–6)) to include a list of shipping methods that can be used to send return-

able items (loans) to a borrowing library.

Any shipping method specified here also appear in the Ship Loan Via drop-down list on a library record.
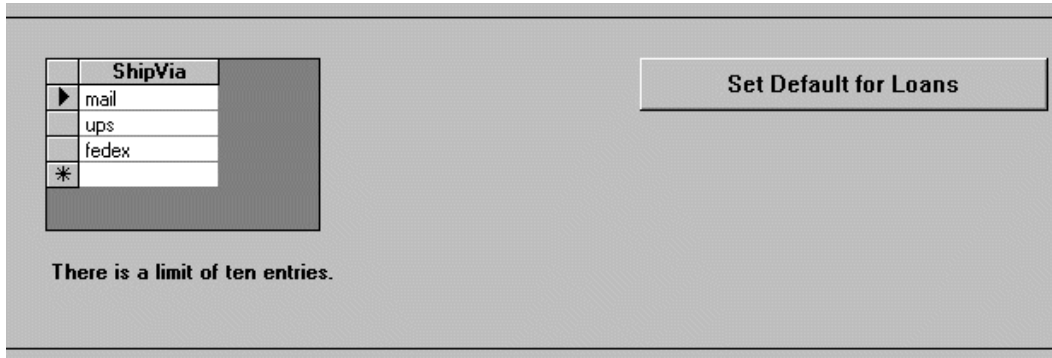
Figure 8.4. General Preferences dialog box - Loan Ship Methods radio button selected

- To edit a shipping method, highlight the method you want to change and enter the new method.

- To add to the shipping methods listed, place your cursor in the blank field at the bottom of the list and enter the new method.

- To set a shipping method on the list as the default for Lending, click the gray box in front of the default method to highlight the entire field. Click the Set Default for Loans button. A default shipping method is applied to the Ship Loan Via field for new library records.

  Selecting a default Shipping Method is also used when you update the status of a lending request by choosing Yes Loan as a response to the request. If a shipping method is defined in the Borrower's library record, it populates the Loan Shipped Via field of the Update Lending Requests dialog box. If shipping method is not defined in the Borrower's library record, a drop-down list of all the shipping methods defined in Preferences displays in the Loan Shipped Via field.

9. Click the Copy Ship Methods radio button.

    Result

    The dialog box updates to include a list of shipping methods that can be used to send non-returnable items, for example, photocopies, to a borrowing library.

    Any shipping method specified here also display in the Ship Copy Via drop-down list on a library record.

10. Follow the same steps for Loan Ship Methods. A default shipping method is applied to the Ship Copy Via field for new library records.

    Selecting a default Shipping Method is also used when you update the status of a lending request by choosing Yes Copy as a response to the request. If a shipping method is defined in the Borrower's library record, it populates the Copy Shipped Via field of the Update Lending Requests dialog box. If shipping method is not defined in the Borrower's library record, a drop-down list of all the shipping methods defined in Preferences displays in the Copy Shipped Via field.

11. Click the Conditional Messages radio button.

Result

The dialog box updates to include a list of messages that can be used when you update the status of a lending request to Conditional Status (see Figure 8.5, "General Preferences dialog box - Conditional Messages radio button selected" (page 8–7)). Any message defined here appears in the Message field drop-down list of the Update Lending Requests dialog box.
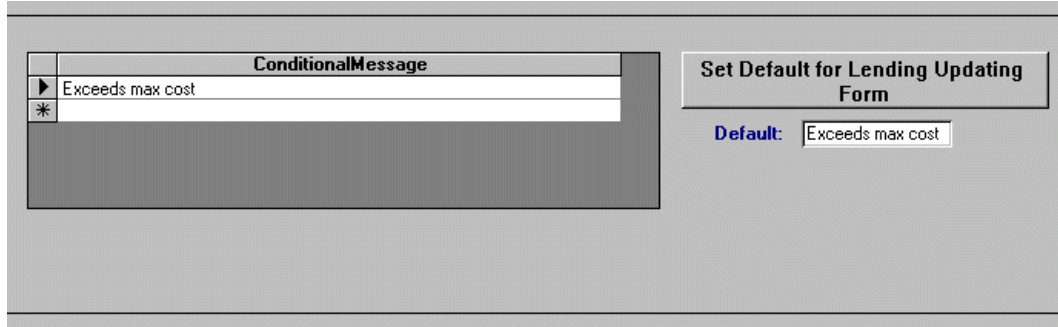
Figure 8.5. General Preferences dialog box - Conditional Messages radio button selected

- To edit a message, highlight the message you want to change and enter the new message.

- To add to the messages listed, place your cursor in the blank field at the bottom of the list and enter the new message.

- To select a conditional message on the list as the default for Lending, click the gray box in front of the message to highlight the entire field. Click the Set Default for Lending Updating Form button. The default message is applied to the Message field each time you update a lending request to a status of Conditional. The current default is displayed under the Set Default button.

  You do not have to list every possible message since you can type a new message into the message field on the Update Lending Request dialog box. However, you can add as many messages here as you like.

12. Click the No-Response Reasons radio button.

   Result

   The dialog box updates (Figure 8.6, "General Preferences dialog box - No-Response Reasons radio button selected" (page 8–8)) to include a list of ISO Codes and ISO text messages that can be used when you update a lending request to No status.

   Any reason defined here appears in the Reason field drop-down list of the Update Lending Requests dialog box. The no-response reason code displays in the Lending Notes of a lending request and can be viewed in the Lending Request Details dialog box.
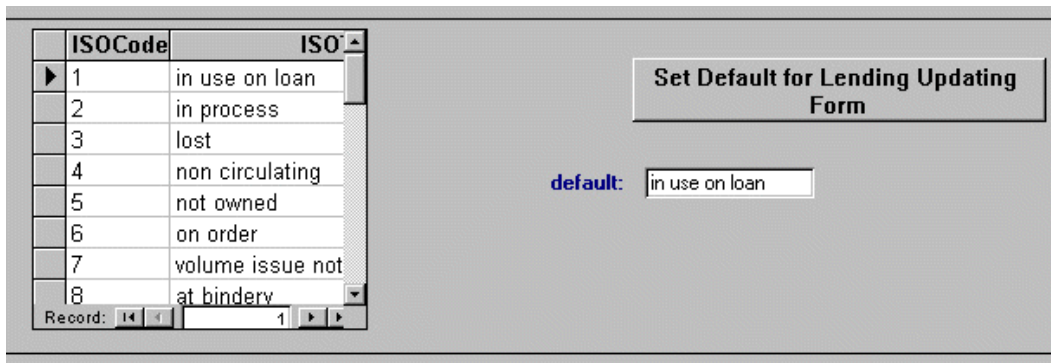
Figure 8.6. General Preferences dialog box - No-Response Reasons radio button selected

13. To select a no-response reason on the list as the default for Lending, click the gray box in front of the message to highlight the entire field. Click the Set Default for Lending Updating Form button. The default reason is applied to the Reason field each time you update a lending request to No status. The current default is displayed under the Set Default button in the Default field.

14. Click the Request Methods radio button.

Result

The dialog box updates (Figure 8.7, "General Preferences dialog box - Request Methods radio button selected" (page 8–8)) to include a list of request submission methods.

Any request method specified here appears in the Submitted Via drop-down list on the Prepare ALA Form dialog box (borrowing menu) and the Method Received drop-down list on the Input ALA Form dialog box (lending menu) for new request records.
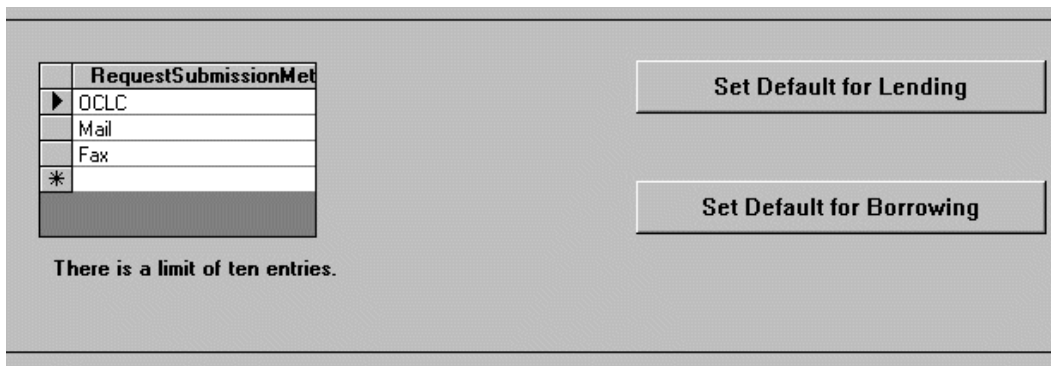
Figure 8.7. General Preferences dialog box - Request Methods radio button selected

- To edit a request submission method, highlight the method you want to change and enter the new method.

- To add to the request submission methods listed, place your cursor in the blank field at the bottom

of the list and enter the new method.

- To select a request submission method on the list as the default for Lending or Borrowing, click the gray box in front of the default method to highlight the entire field. Click the Set Default for Lending or Set Default for Borrowing button. A default request submission method is applied to the Method Received field on the Submitted Via field of the Prepare ALA Form dialog box (borrowing menu) and the Input ALA Form dialog box (lending menu) for new request records.

15. Click the Billing Methods radio button.

Result

The dialog box updates (Figure 8.8, "General Preferences dialog box - Billing Methods radio button selected" (page 8–9)) to include two lists, one for borrowing billing methods and one for lending billing methods.

These two lists contain the billing methods that ILL Management supports: Invoice, IFM, Deposit Account, or None. Any billing methods specified here appear in the Billing Method drop-down list on a library record.
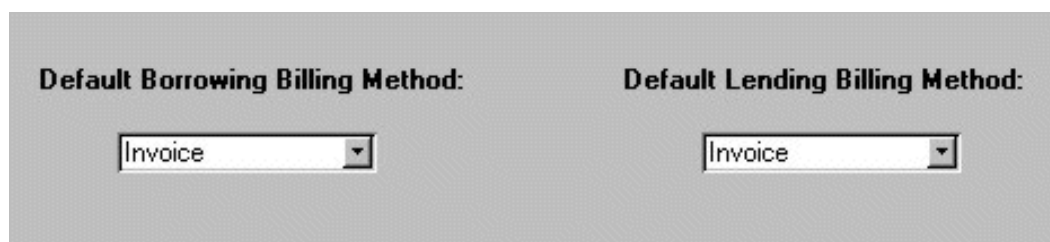
Figure 8.8. General Preferences dialog box - Billing Methods radio button selected

Note

These are fixed lists so they cannot be edited.

16. To select a default billing method for borrowing, click the drop-down arrow and choose a billing method from the Default Borrowing Billing Method list. To select a default billing method for lending, click the drop-down arrow and choose a billing method from the Default Lending Billing Method list. The default billing methods are applied to new library records.

    Invoice refers to either Invoice or Account Statement, whichever is selected in Billing Preferences, discussed below.

17. Click the Close button to save the information, close the General Preferences dialog box, and return to the Borrowing main menu.

Procedure 8.2. Configuring Billing Preferences

In Billing Preferences, you can define the information that displays on an invoice or account statement, as well as a starting invoice number and whether invoices print one per item or one per library.

Use the following to configure the Billing preferences:

1. Choose Billing from the Preferences menu.
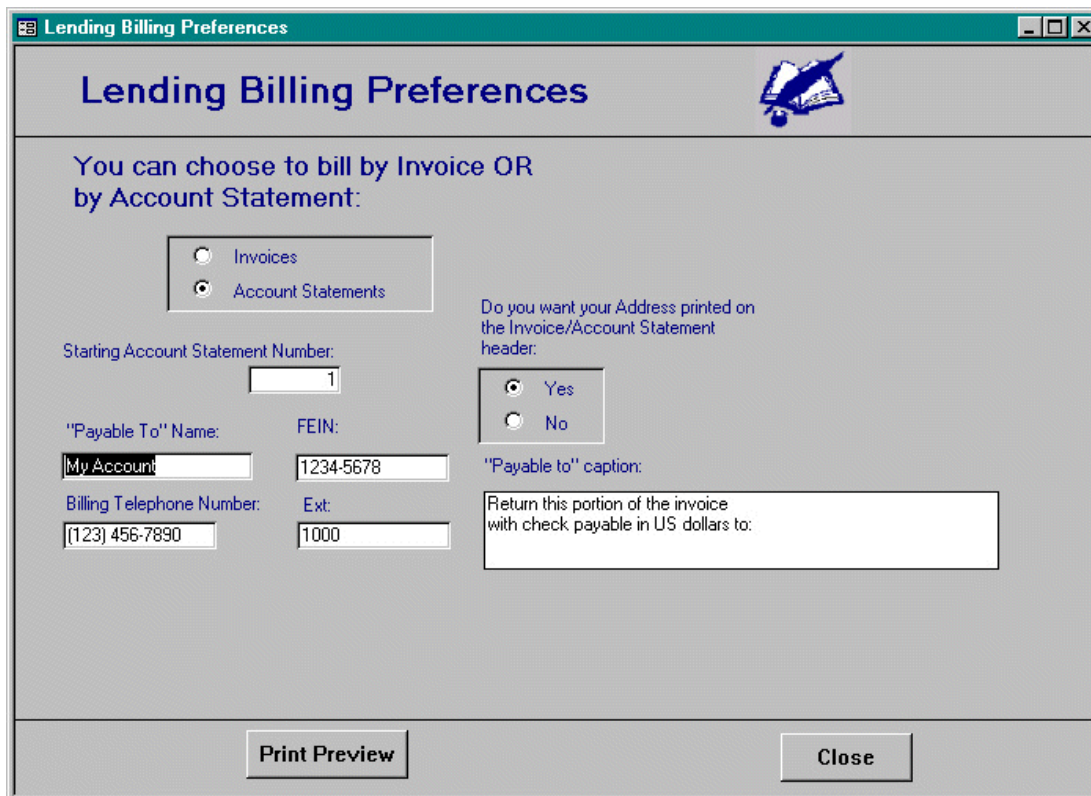
   ### Result

   The Lending Billing Preferences dialog box displays. The dialog box updates depending on whether the Invoices or the Account Statement radio button is selected.

   An Invoice is a record of the item(s) filled and any charges attached to those items.

   An Account Statement is a record of all item(s) filled, any charges or payments received since the last statement, and a beginning and ending balance. This type of bill, not unlike your own credit card statement, would typically be submitted on a periodic basis, for example, monthly or quarterly.

2. Click the Invoices radio button (Figure 8.9, "Lending Billing Preferences dialog box - Invoices radio button selected" (page 8–10)).

Figure 8.9. Lending Billing Preferences dialog box - Invoices radio button selected

3. In the upper-right portion of the dialog box, define whether you want one invoice created per item or one invoice created per library. Click either the One per Item or One per Library radio button.

4. In the Starting Invoice Number field, type the starting number (numerics only, 8 characters in length) you would like ILL Management to use for invoices.

5. Click the Yes or No radio button to have your address printed on the invoice header.

6. Click the Yes or No radio button to have the invoice number print on the invoice.

   Configure the optional Text Boxes:

- "Payable To" Name - displays (Figure 8.12, "Invoice - footer" (page 8–12)) in the footer of the invoice

- FEIN - Federal Employer Identification Number displays in the header of the invoice

- Billing Telephone Number - displays in the header of the invoice

- Ext. - displays in the header of the invoice

- "Payable to" caption - displays in the footer of the invoice

- Optional text on Invoice: - displays in the header of the invoice (Figure 8.10, "Invoice - header" (page 8–11))

Figure 8.10. Invoice - header

Figure 8.11. Invoice - Borrower and item information

Figure 8.12. Invoice - footer

7.   Click the Account Statement radio button.

Result

The Lending Billing Preferences dialog box updates to include the same fields as for an invoice with the exception of the Do you want Invoices created, Do you want the Invoice Number printed on the Invoice, and Optional text on Invoice fields.

Once you have filled in the information for either Invoices or Account Statements, click the Print Preview button to see how your invoice or statement will look.

8.   Click the Close button to save the information, close the Lending Billing Preferences dialog box, and return to the Borrowing main menu.

Procedure 8.3. Notices Archive

This preference is used to set the default values for time intervals associated with printing notices such as overdues and recalls as well as archiving records.

Because a brief record is created for the ILL item in the Voyager database, you can use the capabilities of Voyager to keep track of overdue and recalled items. In the Voyager System Administration module you can define any circulation policies (for example, overdue, recall, and lost intervals, loan periods, and fine intervals and rates) related to interlibrary loan items. You can also use the Reporter module to print any notices associated with an ILL item.

1.   Choose Notices-Archive on the Preferences menu.

Result

The OverdueArchivePrefs: Form dialog box opens (Figure 8.13, "OverdueArchivePrefs: Form dialog box" (page 8–13)).

Figure 8.13. OverdueArchivePrefs: Form dialog box

There are seven radio buttons in the top portion of the dialog box. Depending on the radio button you select, the lower portion of the dialog box updates to include a new field (the area is blank until you choose a radio button, as shown in Figure 8.13, "OverdueArchivePrefs: Form dialog box" (page 8–13)).

2. Click the Bor First Overdues or the Lend First Overdues radio button.

Result

The dialog box updates (see Figure 8.14, "Form Dialog Box - Borrow 1st Overdues (top) and Lend 1st Overdues (bottom) Selected" (page 8–13)) to include a field for the number of days from the due date that first overdue notices are printed.

The number that you enter here is the default when you click the Overdue/Recall Notices button on the Borrowing menu or the Overdue Notices button on the Lending menu in ILL Management. You can change the number of days before you print notices from either of those locations.
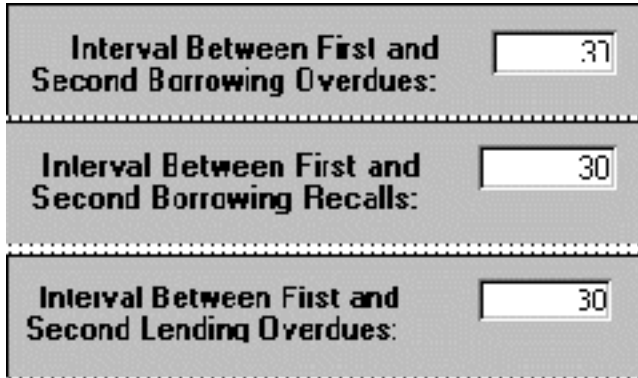
Figure 8.14. Form Dialog Box - Borrow 1st Overdues (top) and Lend 1st Overdues (bottom) Selected

3.   Click the Bor Second Overdues, Bor Second Recalls, or the Lend Second Overdues radio button.

   Result

   The dialog box updates (see Figure 8.15, "Bor Second Overdues (top), Bor Second Recalls (middle), and Lend Second Overdues (bottom) selected" (page 8–14)) to include a field for the interval (in days) between first and second overdue notices or first and second recall notices.
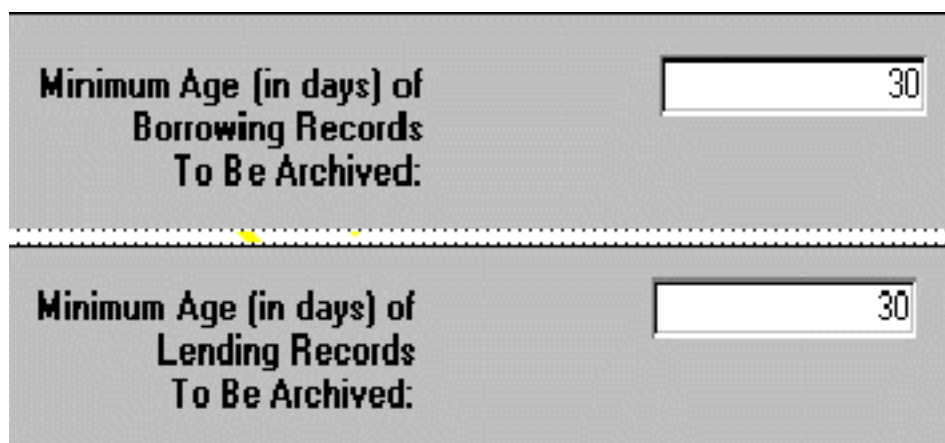
   The number that you enter here is the default when you click the Overdue/Recall Notices button on the Borrowing menu or the Overdue Notices button on the Lending menu in ILL Management. You can change the number of days before you print notices from either of those locations.

   Figure 8.15. Bor Second Overdues (top), Bor Second Recalls (middle), and Lend Second Overdues (bottom) selected

4.   Click the Bor Archive or the Lend Archive radio button.

   Result

   The dialog box updates (see Figure 8.16, "Bor Archive (top) and Lend Archive (bottom) radio button selected" (page 8–15)) to include a field for the minimum age (in days) before borrowing and lending requests should be archived.

   The archive function happens automatically based on the number you enter into these fields. However, you are still able to retrieve and view requests that have been archived.

Figure 8.16. Bor Archive (top) and Lend Archive (bottom) radio button selected

5. Click the Close button to save the information, close the Overdue Archive Prefs dialog box, and return to the Borrowing main menu.

Procedure 8.4. Notices Customize

This preference allows you to customize the look of overdue, recall, and renewal notices as well as borrowing and lending bookstraps and copy cover sheets. The dialog box contains nine tabs in the Notices Preferences dialog box. When you click the tab for a particular notice, you see the options and current custom text (if any) for the notice. You can change the wording or option and, for most types of notices, click the Preview button to check the appearance of the notice.

For all of the following notices, using the Ctrl + Enter key combination moves the cursor to the beginning of the next line.

Use the following to configure the Notices Preferences dialog box:

1. Choose Notices Customize on the Preferences menu.

Result

The Notices Preferences dialog box opens.

2. Select the Patron Notice tab in the Notices Preferences dialog box. See Figure 8.17, "Notices Preferences dialog box - Patron Notice tab" (page 8–16).

Figure 8.17. Notices Preferences dialog box - Patron Notice tab

You can change any wording that displays in the Patron Notice Paragraph box and click Preview Report button to preview the notice. The partial sentence in the figure above is preceded by a title list of available item(s).

3. In the Produce Notices for: information block, select Loans or Copies or both.

4. In the Notice Format information block, select Always Print, Email if possible, otherwise Print, or Email if possible, don't print. You can only make one selection.

5. In the Use Email Address from information block you can tell the system where to find the appropriate e-mail address, if you choose one of the e-mail options in the Notice Format information block. Select Bor Rqst 1st or Patron table 1st.

Choosing one of these options tells the system to check either the borrowing request first or the patron table (in ILL Management, not the Voyager patron database) first for an e-mail address. If the system doesn't find an e-mail address in the first location, it checks the second location.

The selections that you make for the three check boxes determine what action, if any, ILL Management takes when you update an ILL request to Received Copy or Received Loan. To help you decide on a selection, first think about what the patron sees on the patron information page in WebVoyáge and how they are notified when a requested item becomes available.

If a patron requests a loan, for example, a book or video, and the item is received, the status of the request is updated to Received Loan in ILL Management.

Updating the ILL request in Voyager Circulation:

•   Creates brief bib/holdings/item records for the item

•   Places a hold on it for the patron

When the item is discharged at the pickup location, the request information moves from the Requests Pending section to the Items Available section of the patron information page in WebVoyáge. Placing the hold also queues an Items Available notice that is mailed or e-mailed to the patron by the Voyager Reporter module.

If the request was for a photocopy of a journal article, the request is updated to Received Copy in ILL Management. In WebVoyáge, the request still displays in the Requests Pending section with a status of Received. However, because a library does not normally create brief records for photocopies, there is no mechanism for queuing an Items Available notice for the patron. You can use the preferences described above to do so.

For example, you could select:

- Produce Notices for: Copies

- Notice Format: E-mail if possible, otherwise Print

- Use Email Address from: Borrowing Request 1st

If you made those selections, the Produce Patron Notice check box in the Update Borrowing Requests dialog box is automatically checked when you update the status to Received Copy. When you click the Accept button, ILL Management automatically sends the patron notice by e-mail if it finds an e-mail address. If it does not find an e-mail address, it prints the notice.

Remember that whenever ILL Management is looking for patron information, it is checking its own patron database, not the Voyage patron database. If it does not find an e-mail address in the borrowing request, nor does it find one in the ILL patron database, then it prints the notice. If the patron does not have a record in the ILL patron database, though, the only patron information that prints on the notice is the patron's name.

If you decide to send patron notices by e-mail, it is important to make sure that all requests include an e-mail address. You can facilitate this by adding the e-mail field when you create your request forms (Section 4.6.1, "Request Forms" (page 4–19)) Which, when you think about it, is a lot easier than maintaining two separate patron databases.

6. Select the Bor Bookstrap tab in the Notices Preferences dialog box (Figure 8.18, "Notices Preferences dialog box - Bor Bookstrap tab" (page 8–18)).

Figure 8.18. Notices Preferences dialog box - Bor Bookstrap tab

You can change any wording that displays in the Bookstrap Address Paragraph box and the Bookstrap Lower Paragraph box. Click the Preview Report button to preview the bookstrap. Select the Always Print Bookstraps check box if you want to print bookstraps whenever you update a borrowing request to Received Copy or Received Loan. If you select this check box, the check box in the Update Borrowing Requests dialog box is always checked.

You can change these preferences at any time, as well as uncheck the Print Book Strap check box in Update Borrowing Requests.

7. Select the Bor Copy Coversheet tab in the Notices Preferences dialog box (Figure 8.19, "Notices Preferences dialog box - Bor Copy Coversheet tab" (page 8–19)). If you want to print coversheets for received photocopies, click the check box.
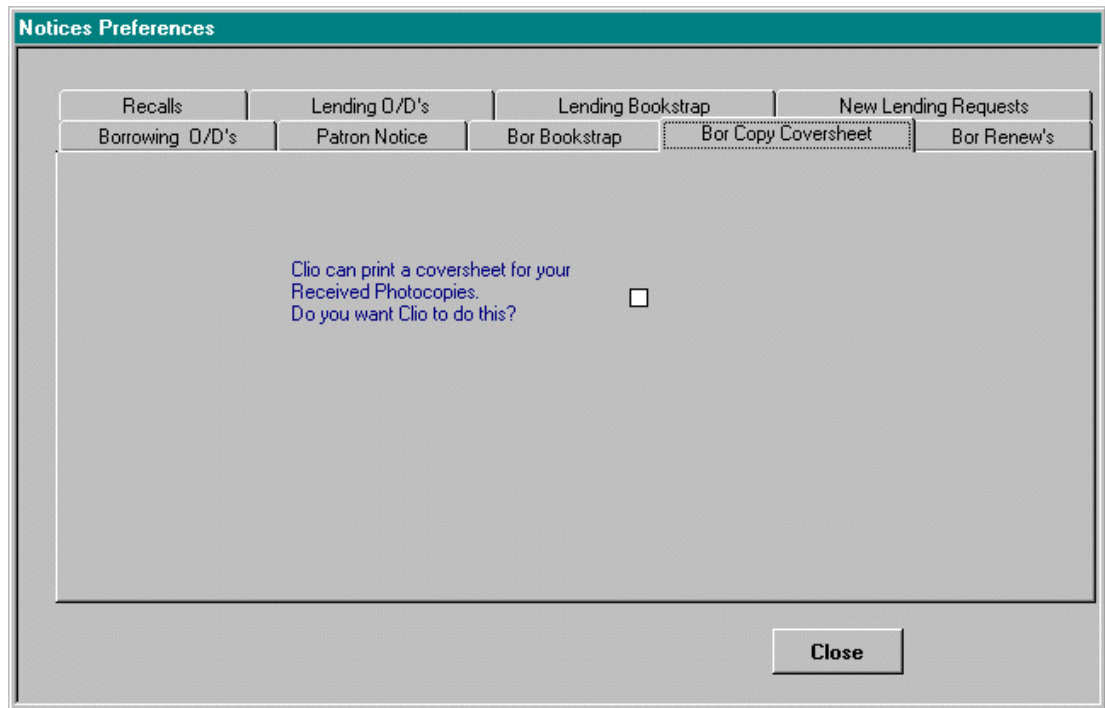
Figure 8.19. Notices Preferences dialog box - Bor Copy Coversheet tab

8. Select the Bor Renew's tab in the Notices Preferences dialog box (Figure 8.20, "Notices Preferences dialog box - Bor Renew tab" (page 8–20)). You can change any wording that displays in the Bor No Renew Paragraph or Bor Renew OK Paragraph box.

9. Click the Preview Report button by either box to preview the notice.

Figure 8.20. Notices Preferences dialog box - Bor Renew tab

10. Select the Recalls tab in the Notices Preferences dialog box (Figure 8.21, "Notices Preferences dialog box - Recalls tab" (page 8–21)). You can change any wording that displays in the First Recall Paragraph or Second Recall Paragraph box.

11. Click the Preview Report button by either box to preview the notice.
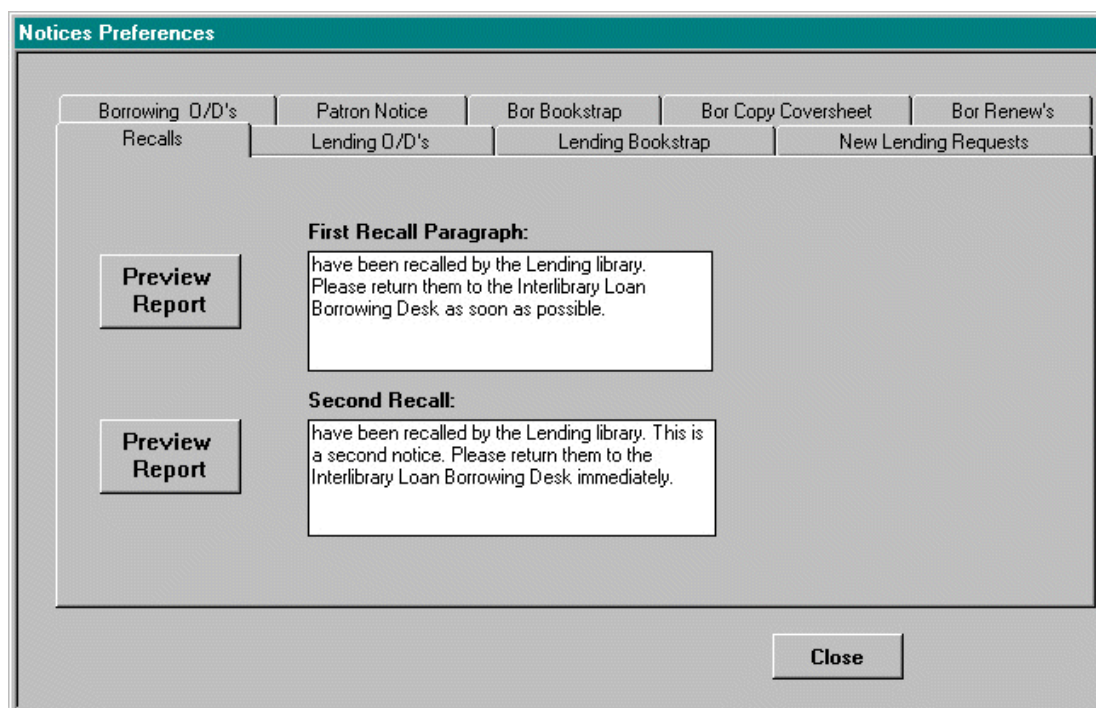
Figure 8.21. Notices Preferences dialog box - Recalls tab

Select the Lending O/D's tab in the Notices Preferences dialog box (Figure 8.22, "Notices Preferences dialog box - Lending O/D's tab" (page 8–22)). You can change any wording that displays in the First Overdue Paragraph or Second Overdue Paragraph box.

12. Click the Preview Report button by either box to preview the notice.
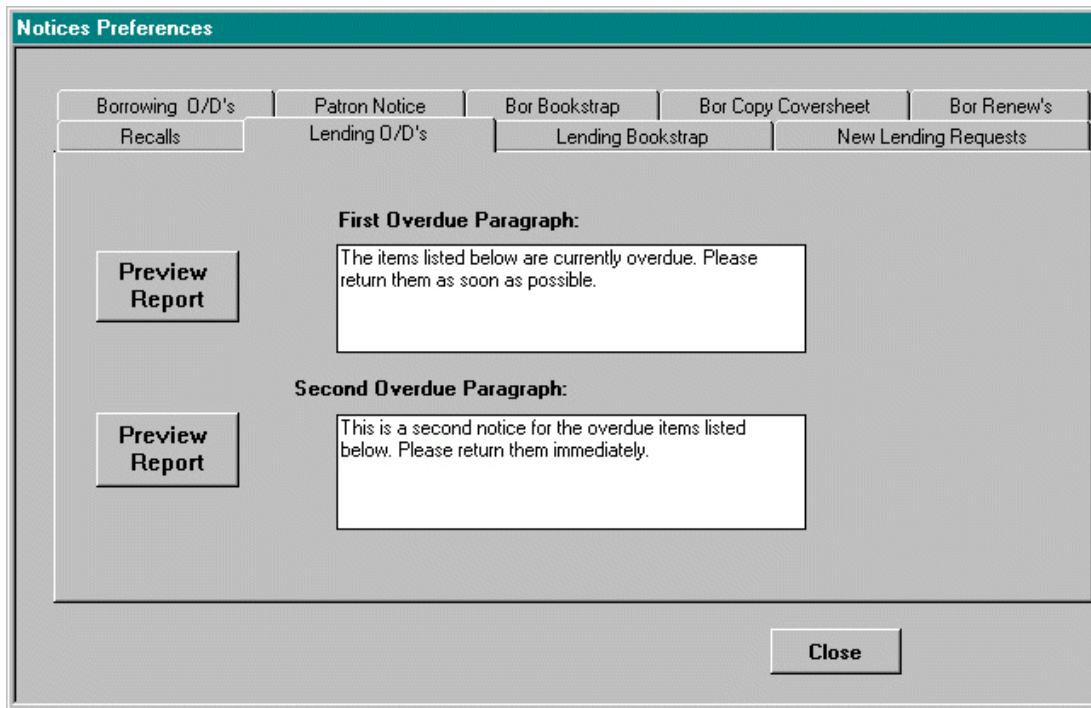
Figure 8.22. Notices Preferences dialog box - Lending O/D's tab

13. Select the Lending Bookstrap tab in the Notices Preferences dialog box. You can change any wording that displays in the Bookstrap Address Paragraph or Bookstrap Lower Paragraph box.

14. Click the Preview Report button by either box to preview the notice.

15. Select the Always Print Bookstraps check box if you want to print bookstraps whenever you update a lending request to Yes Copy or Yes Loan. If you select this check box, the check box in the Update Lending Requests dialog box is always checked.

    You can change these preferences at any time, as well as uncheck the check box in Update Lending Requests for any or all requests.

16. Select the New Lending Requests tab in the Notices Preferences dialog box. Select the check box if you want ILL Management to print all incoming Lending Requests.

17. Click the Close button to save the information, close the Notices Preferences dialog box, and return to the Borrowing main menu.

Procedure 8.5. Updating Address

This menu item allows you to change your own address as it appears on various forms and notices.

Use the following to update addresses:

1. Select Addresses from the Preferences menu.

Result

The Update Addresses dialog box displays. See Figure 8.23, "Update Address dialog box - Preferences menu" (page 8–23).

Figure 8.23. Update Address dialog box - Preferences menu

Address options are available for the following functions:

- Notices

- Billing

- ALA Form

- Lending

2. Type your address for each option.

3. Click Close.

Procedure 8.6. Text Email/ALA Preferences
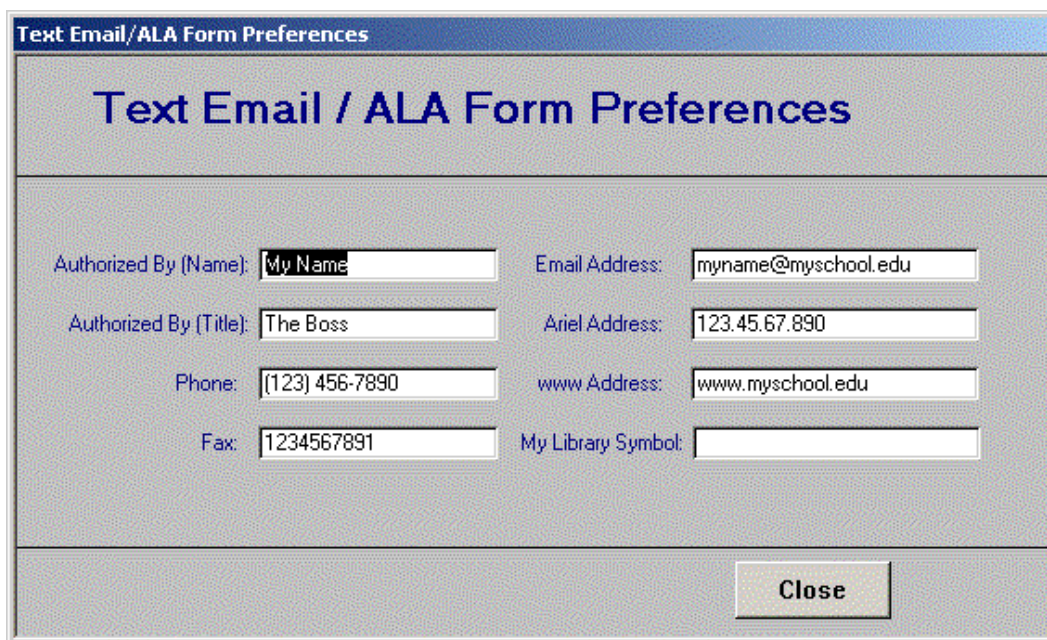
You can add default information about your library other than your address that appears on the ALA form and e-mail requests.

Use the following to configure ALA Preferences:

1. Select Text Email/ALA Preferences from the Preferences menu.

    ### Result

    The Text Email/ALA Form Preferences dialog box opens. See Figure 8.24, "ALA Form Preferences dialog box - Preferences menu" (page 8–24).

Figure 8.24. ALA Form Preferences dialog box - Preferences menu

2. Enter your Text Email/ALA form information.

3. Click Close.

Procedure 8.7. Configuring Patron Preferences

You can add default information to specify in ILL Management how to handle Borrowing Patron information.

Use the following to configure patron preferences:

1. Select Patron Matching from the Preferences menu.

Result

The Patron Preferences dialog box opens. See Figure 8.25, "Patron Preferences dialog box - Preferences menu" (page 8–25).
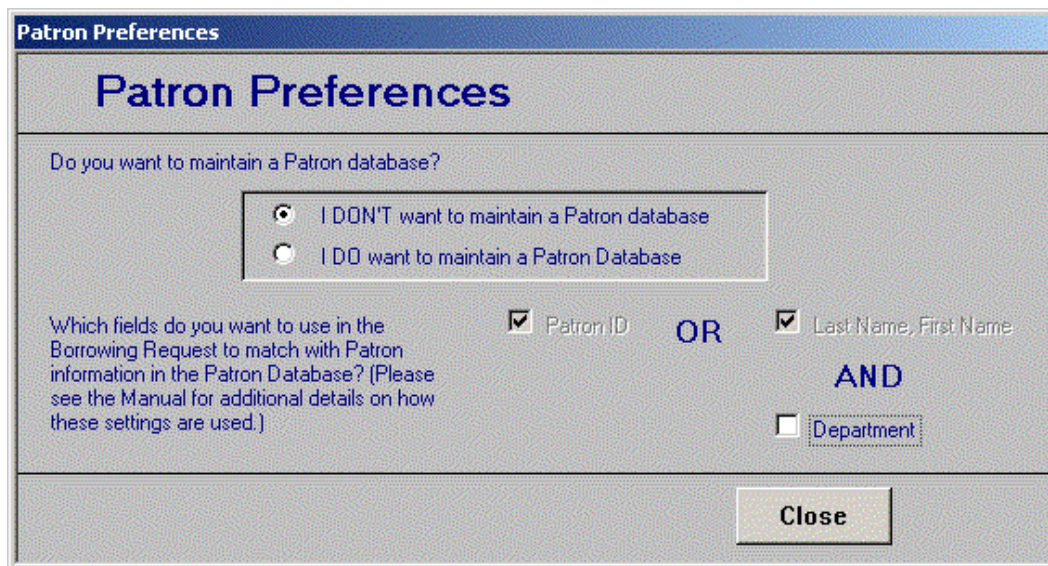
Figure 8.25. Patron Preferences dialog box - Preferences menu

The first part of the Patron Preferences dialog box asks you to determine how you enter patron information, especially patron department and status, on an OCLC workform. The choice you make here ensures that ILL Management finds the patron information and be able to use the information correctly in reports.

You can choose to maintain a separate Patron database in ILL Management for information such as e-mail address, mailing address, and telephone number. This information can be used to generate patron notices for overdues, recalls, and so on from ILL Management. Choose the appropriate radio button.

Most Voyager sites choose to use their Voyager patron database rather than the ILL Management patron database. This does the following:

• Enable you to not only create brief bibliographic records for borrowed items then charge them to a patron, but also to charge locally owned items that are lent to other institutions and to keep circulation statistics.

• Allow you to use your established Circulation policies to keep track of all ILL items (borrowed and lent) and to generate notices and reports based on those policies.

• Reduce the disk space requirements of your ILL module.

If you choose to maintain a Patron database in ILL Management, you must indicate which fields you want to use to match the Patron information in a Borrowing Request to a patron record in the ILL Patron database. You can choose to match on the Patron ID from the PATRON ID: field on a workform, the Last Name, First Name only, or the Last Name, First Name and Department.

The matching takes place when ILL Request reads in new borrowing requests. If the information in the Patron fields of the request "matches" an existing ILL Maintenance Module patron record, then the two records are linked. Since typographical errors and variations occur, this process is not

exact. The default rule that ILL Management uses to determine whether the information "matched" is if the Last Name, First Name and Department values are equal in both records.

2. Select your Patron Preference option for maintaining a patron database.

    You can choose to maintain a separate Patron database in ILL Management for information such as e-mail address, mailing address, and telephone number. This information can be used to generate patron notices for overdues, recalls, and so on from ILL Management.

    If you choose to maintain a Patron database in ILL Management, you must indicate which fields you want to use to match the Patron information in a Borrowing Request to a patron record in the ILL Patron database. You can choose to match on the Patron ID field or the Last Name, First Name only, or the Last Name, First Name and Department.

    The matching takes place when ILL Request reads in new borrowing requests. If the information in the Patron fields of the request "matches" an existing ILL Maintenance Module patron record, then the two records are linked. Since typographical errors and variations occur, this process is not exact. The default rule that ILL Management uses to determine whether the information "matched" is if the Last Name, First Name and Department values are equal in both records.

    Note

    Most Voyager sites choose to use their Voyager patron database rather than the ILL Management patron database. Using the Voyager patron database does the following:

    •   Enables you to not only create brief bibliographic records for borrowed items then charge them to a patron, but also to charge locally owned items that are lent to other institutions and to keep circulation statistics.

    •   Allows you to use your established Circulation policies to keep track of all ILL items (borrowed and lent) and to generate notices and reports based on those policies.

    •   Reduces the disk space requirements of your ILL module.

3. Click Close.

Procedure 8.8. Branch ID

This menu item allows you to set the default Branch ID for each workstation.

Use the following to set the default Branch ID for a workstation:

1. Select Branch ID from the Preferences menu.

    Result

    The Branch ID dialog box opens (Figure 8.26, "Branch ID dialog box - Preferences menu" (page 8–27)).
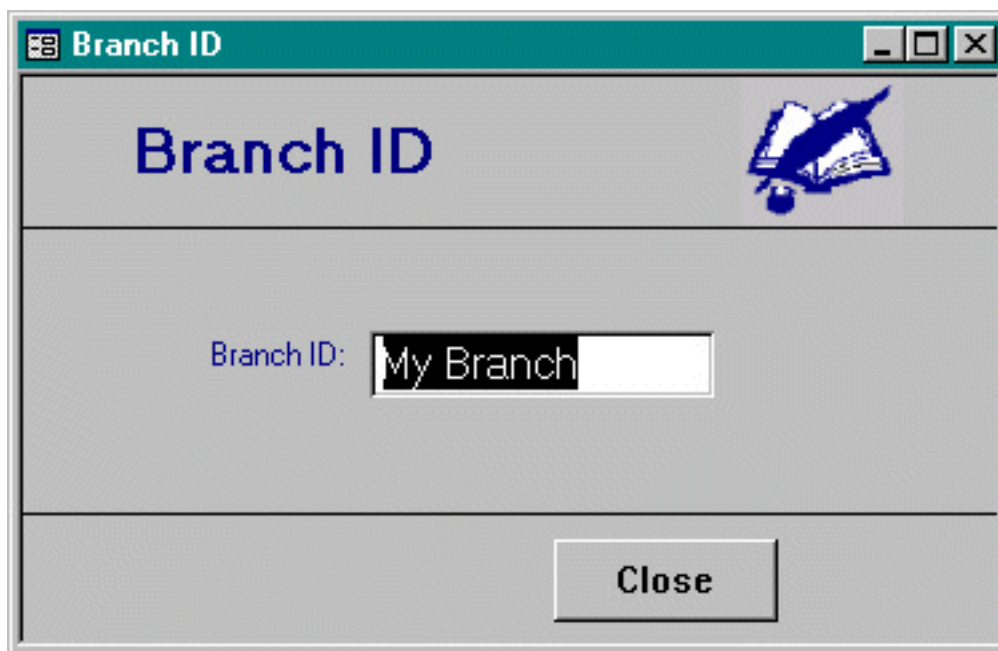
Figure 8.26. Branch ID dialog box - Preferences menu

2.   Enter the ID in the Branch ID field (limit 20 characters).

3.   Click the Close button to save the information, close the Branch ID dialog box and return to the Bor-
     rowing main menu.

Procedure 8.9. Email Setup
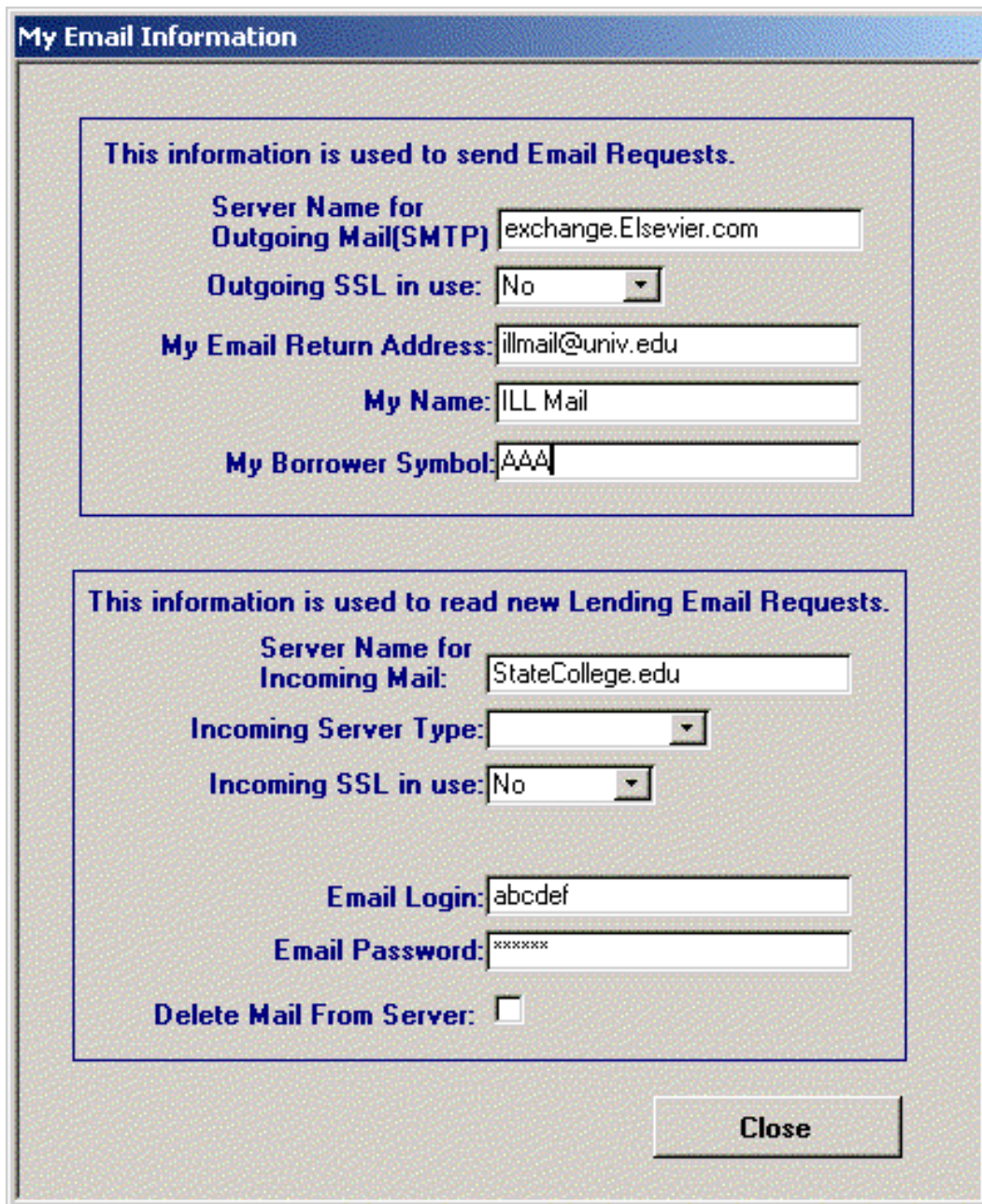
You can specify your outgoing (SMTP) mail server, the return address, and the name and borrowing sym-
bol to be applied to each of your outgoing e-mails.

Use the following to configure ILL Email Setup:

1.   Select Email Setup from the Preferences menu.

Result

The My Email Information dialog box opens. See Figure 8.27, "My Email Information dialog box
- Preferences menu" (page 8–28).

Figure 8.27. My Email Information dialog box - Preferences menu

2. Enter your email information.

3. Click Close.

Procedure 8.10. OPAC Setup
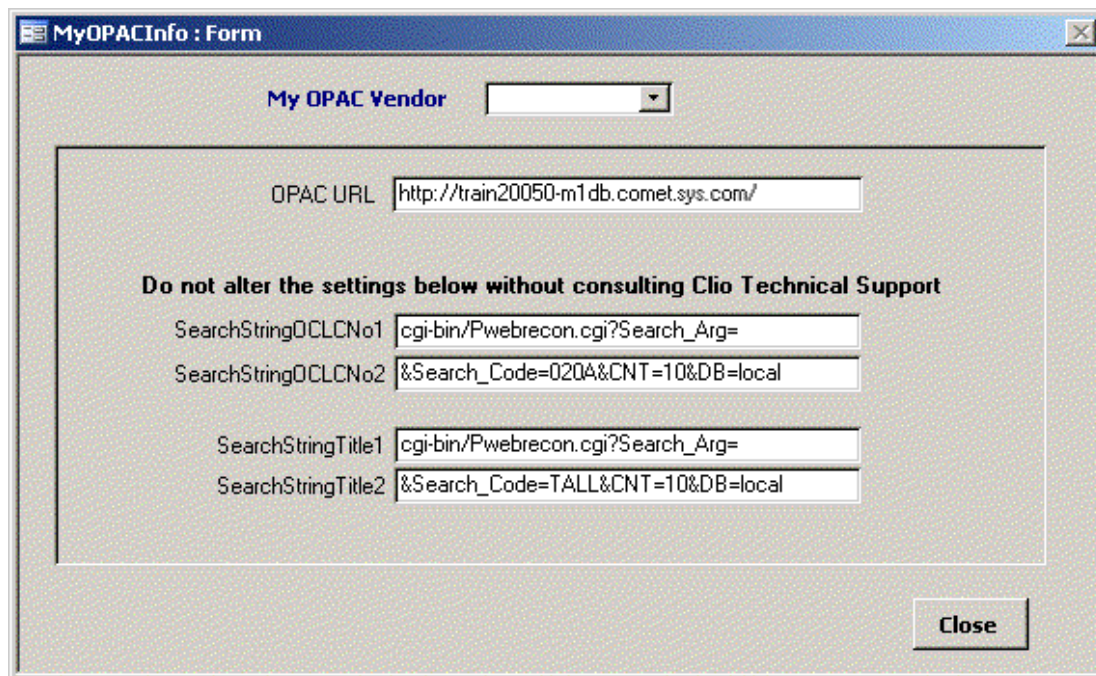
The OPAC Setup section of ILL Management Preferences allows you to check your local OPAC from

within ILL Management. You can check item statuses, call numbers, and so on without needing to leave ILL. This eliminates the need to switch back and forth between ILL Management and WebVoyáge when using ILL.

Use the following to configure your ILL Management to connect to your local OPAC:

1. Enter the address of your OPAC server in the OPAC URL field of the OPAC Setup screen. See Figure 8.28, "OPAC Setup screen" (page 8–29) for an example of a WebVoyáge Classic environment.

Figure 8.28. OPAC Setup screen

The remaining fields generate the URL to perform the search in WebVoyáge. They are configured to perform an OCLC/035a search or a left-anchored title search typically. The search syntax for WebVoyáge Classic is provided by default.

In a WebVoyáge 7 or higher environment, SearchStringTitle1 and SearchStringTitle2 should use the following with any modifications regarding index preferences described below:

SearchStringTitle1:

vwebv/search?version=7&searchArg=

SearchStringTitle2:

&searchCode=TALL&limitTo=none&recCount=10&searchType=1

The SearchStringTitle2 should be coded to search your preferred index. By default, the string points to the TALL (left-anchored title) index, the preferred Voyager ILL index. Optionally, you may substitute, for example, TKEY for TALL in SearchStringTitle2 to use the title keyword index instead of the left-anchored title index.

2. Click Close.

Procedure 8.11. Add New OPAC

The Add New OPAC option allows you to create a list of OPAC vendors and associated search strings.
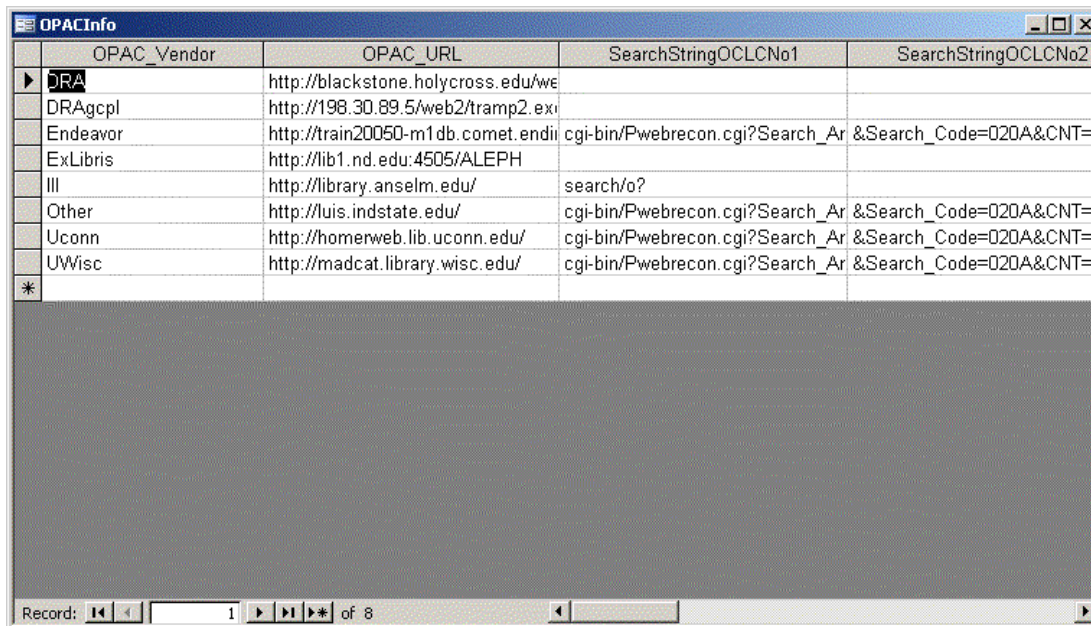
Use the following to add new OPAC information:

1. Click Preferences and select Add New OPAC.

    ### Result

    The OPAC Info dialog box opens. See Figure 8.29, "OPAC Info" (page 8–30).

2. Enter your OPAC information into the spreadsheet format including the following pieces of information:

    *   OPAC Vendor

    *   OPAC URL

    *   Search String 1 and 2

3. Close the dialog box.

Figure 8.29. OPAC Info

Procedure 8.12. OCLC Setup

The OCLC Setup option allows you to enter OCLC service information.

Use the following to enter your OCLC service information:

1.   Click Preferences and select OCLC Setup.

   Result

   The OCLC Service Information dialog box opens. See Figure 8.30, "OCLC Service Information"
   (page 8–31).

2.   Enter your OCLC service information.

3.   Click Close.

   Figure 8.30. OCLC Service Information

Procedure 8.13. Docline Setup

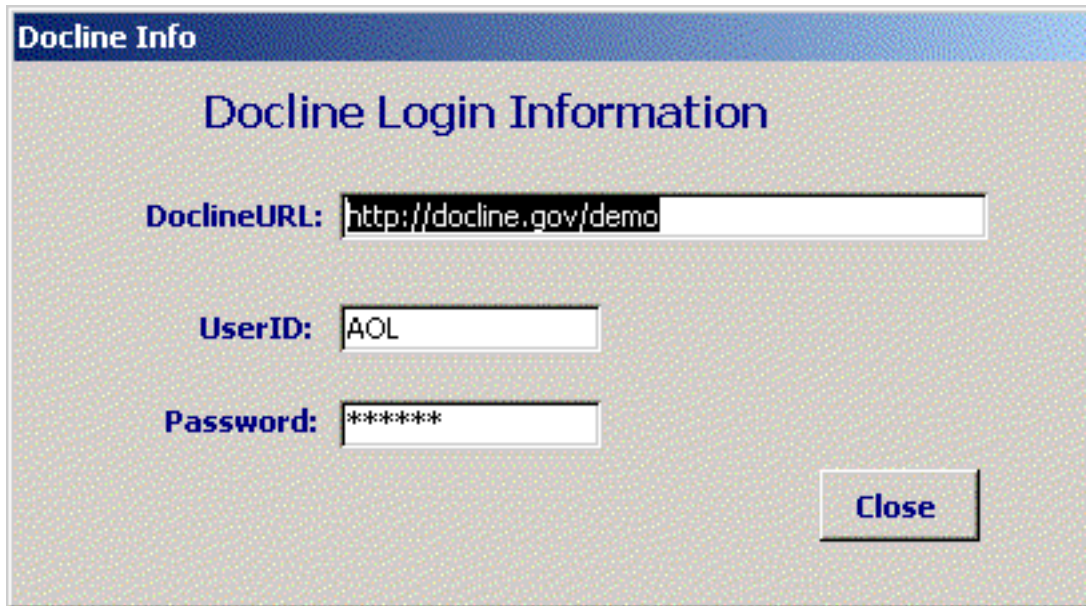The Docline Setup allows you to specify your Docline login information.

Use the following to enter your Docline login information:

1. Click Preferences and select Docline Setup.

    Result

    The Docline Login Information dialog box opens. See Figure 8.31, "Docline Info" (page 8–32).

2. Enter your Docline login information to include the URL, user ID, and password.

3. Click Close.

Figure 8.31. Docline Info

Procedure 8.14. Lending Web Form Setup

The Lending Web Form Setup allows you to enter field names (labels) for your web page email.

Use the following to enter your preferred field names for web page email:

1. Click Preferences and select Lending Web Form Setup.

    Result

    The Setup Web Field Names for Lending dialog box opens. See Figure 8.32, "Setup Web Field Names for Lending" (page 8–33).

2. Enter the field names as you prefer for the web page email. See Figure 8.32, "Setup Web Field Names for Lending" (page 8–33) for some examples.
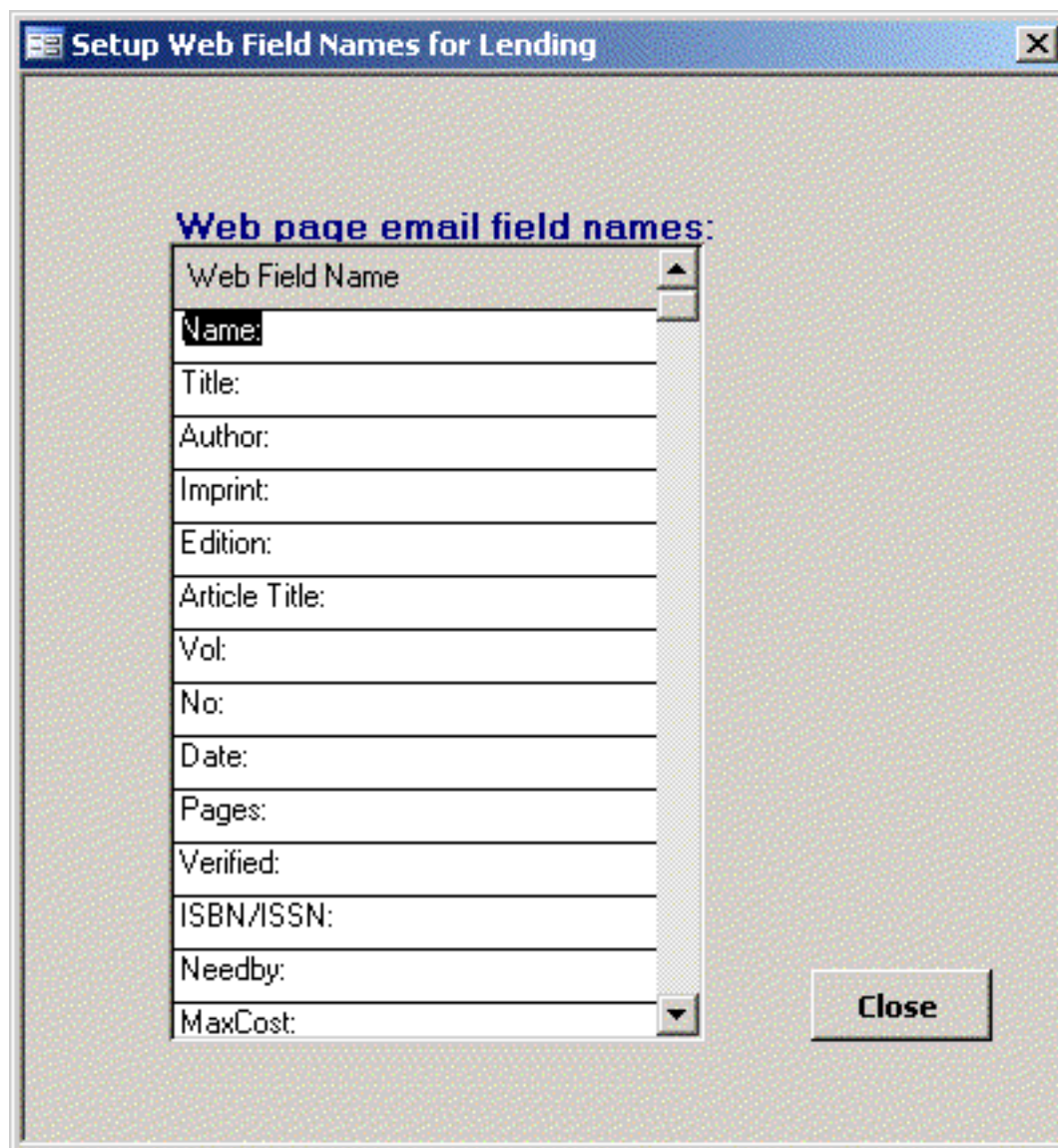
3. Click Close.

Figure 8.32. Setup Web Field Names for Lending

8.3. Voyager Preferences

Before ILL Management can send messages to the Voyager Circulation client to automatically create bibliographic records, holdings, and items, and place holds, Voyager NCIP preferences must be configured. Configure this in Voyager Preferences>Setup Voyager Comms. See Configuring the NCIP Server (page 4–4) for instructions.

Note

Creation of records and placement of holds using NCIP messaging only pertains to loaned or returnable items not photocopies or Ariel files.

8.4. British Library Preferences

The British Library Preferences contains options for BL Reply Codes, Setup BL Account Information, and ARTEmail History.

8.4.1. BL Reply Codes

You may alter the actions that are taken when Reply Codes are received. If you go to the Voyager Preferences/Edit Reply Codes menu item, your screen displays as in Figure 8.33, "BL Reply Codes dialog box" (page 8–34).

Figure 8.33. BL Reply Codes dialog box

The entries on this screen may be edited to alter the behavior of the ILL Module in response to specific reply codes.

8.4.2. Setup BL Account Information

See the ARTEmail chapter for setup information.

8.4.3. ARTEmail History

Actions performed as a consequence of ARTEmail messages are logged in the ARTEmail History Log (see Figure 8.34, "ARTEmail History Log screen" (page 8–35)). You can sort these messages and print them from this screen.

Figure 8.34. ARTEmail History Log screen

8.5. Administration

The Administration menu provides you with maintenance capabilities for ILL Management.

8.5.1. Open Tables

This menu item allows you access to the complete details of several important tables in the ILL database. Toolbar buttons in the upper left of the screen allow you to sort the tables by any field. Click the cursor in the field you want to sort and then click one of the sort buttons.

Adding, editing, or deleting any information from these tables may impact your ability to use ILL Management. Only operators trained in Microsoft Access should access these tables.

Available tables include:

- Patrons

- Borrowing Requests

- Borrowing Requests Archive

- Lending Requests

- Lending Requests Archive

- Libraries

- Invoices

- Account Statements

8.5.2. Select Paper Size

The Select Paper Size menu item enables you to select A4 paper size.

Note

You may also need to make setting changes in Access.

8.5.3. Enter Old OCLC Lending Requests

You can manually enter old OCLC lending requests. Typically, these are requests that were not down-loaded from OCLC. The form includes lending information and bibliographic information.

Procedure 8.15. Entering Old OCLC LendRqsts

Use the following to enter old OCLC LendRqsts:

- Select Enter Old OCLC LendRqsts from the Administration menu.

Result

The Old OCLC Form dialog box opens. See Figure 8.35, "Old OCLC Form dialog box - Administration menu" (page 8–37).

Figure 8.35. Old OCLC Form dialog box - Administration menu

Table 8.1, "OCLC form fields " (page 8–37) details the fields appearing on the Old OCLC form.

Table 8.1. OCLC form fields

Field	Description
ILL:	This number is automatically filled-in. You can change the number to a number on the old lending request.
Method Received:	You can set the default for this field in Preferences>General>Request Methods. You can accept the default or select another method from the drop-down list.
Borrower:	Enter the symbol assigned to the borrowing library or you click the Search Libraries button and choose a symbol from the list. This is a list of all the library records in your library database. If the symbol or library you want to use is not listed, you can create a new library record from this form.
Date Requested:	Date the item was requested.
Date Received:	Date the item was received.
Status:	Defaults to "In Process." To update (change the status) the request, go to the Lending menu and click the Update Lending Requests button. See the chapter regarding Lending for more information.
Maxcost:	Maximum cost the borrowing institution is

Field	Description
	willing to pay for the item.
Copyright Compliance:	Either CCG or CCL.
Borrowing Notes:	Any additional borrowing notes.
Lending Notes:	Any additional lending notes.
Patron:	Patron's name.
Call Number:	Item's call number.
Author:	Author of the item.
Title:	Title of the item or journal.
Edition:	Edition of the item
Imprint:	Publication information of the item.
Article:	Title of the journal article.
Volume:	Volume of the journal.
Number:	Number (issue) of the journal.
Date:	Date of the journal.
Pages:	Pages on which the article displays in the journal.
Verified:	Database or index in which the item or article information was verified.

8.5.4. Archive Borrowing Requests and Archive Lending Requests

The Archiving function allows you to move completed requests such as requests that are done and you don't need to see anymore to another table within the ILL database. Depending on the number of lending and borrowing requests in your database, archiving records periodically speeds up any searching or updating processes. There is a Request Archive table for both Lending and Borrowing requests. Records in these tables are automatically included in all reports that you create from the Statistics dialog box.

The procedure for archiving borrowing and Lending requests is shown in Archiving Borrowing and Lending Requests (page 8–38).

Procedure 8.16. Archiving Borrowing and Lending Requests

Use the following to archive borrowing and lending requests:

1. Select Archive Borrowing Requests from the Administration menu.

Result

The Borrowing Requests Archive dialog box opens (Figure 8.36, "Borrowing Request Archive - Administration menu" (page 8–39)).

The date field is automatically populated if, in Preferences>Notices Archive, you input the minimum age (in days) for borrowing to be archived. You can change the date if you want.

Figure 8.36. Borrowing Request Archive - Administration menu

2.   Click the Archive Now button to archive borrowing requests with a statistics date earlier than the input date; click the Close button to close the dialog box.

3.   Select Archive Lending Requests from the Administration menu. The Lending Archive dialog box opens (Figure 8.37, "Lending Archive dialog box - Administration menu" (page 8–40)).

Figure 8.37. Lending Archive dialog box - Administration menu

The date field is automatically populated if, in Preferences>Notices Archives, you input the minimum age (in days) for lending requests to be archived. You can change the date if you want.

There are two additional information blocks in the dialog box:

4.   For Invoiced Requests - select the radio button to archive paid requests only or to archive paid and un-paid requests.

5.   For IFM Requests - select the radio button to archive verified requests only or to archive verified and unverified requests. IFM stands for OCLC's ILL Fee Management service.

6.   Click the Archive Now button to archive lending requests; click the Close button to close the dialog box.

8.5.5. Reprint New Lending Requests

The Reprint New Lending Requests menu option enables you to specify when to reprint new lending re-quests, specifically those processed after the date and time you enter with this option.

8.5.6. Update ARTEMail to Received

Use this function to update the status of ARTEMail borrowing requests that were shipped electronically. This changes the Shipped status to a Received status. It also updates Post to Patron requests with a status of Shipped. This only needs to be done once after installation.

8.5.7. Re-link Database

The Re-link Database menu option enables you to re-link the ILL program to the location of the cli-odata.mds database.

Procedure 8.17. Re-link Database - Data Directories

You need to specify in ILL Management the location of the ILL database, the cliodata.mdb file.

Use the following steps:

1. Click Administration and select Re-link Database.

    ### Result

    The Data Directories dialog box opens.

2. Click Re-link and specify the pathway to ILL Management's database directory, the cliodata.mdb file, in the Clio Database Directory field.

    ### Example 8.1. Example

    ```
    C:\Program Files\Voyager_ILL\cliodata.mds
    ```

    If the system cannot find the cliodata.mdb file when you launch either ILL Request or ILL Management, you are asked to specify the pathway to the directory. Once you locate the file on either your PC or on the network, the Clio Database Directory field is automatically populated with the correct pathway.

3. Click Close.

Chapter 9. ILL Management - Functions: Borrowing

9.1. Overview

ILL Management uses a series of hierarchical dialog boxes that provide the means to:

- create, edit, and review borrowing and lending requests

- update and monitor the status of a request

- compile statistics

- maintain library records

The buttons available in each dialog box help you navigate through ILL Management. Most buttons open a dialog box on the next level down the hierarchy. On those lower level dialog boxes, the button in the lower right corner of the dialog box returns you to the previous dialog box or the next level up in the hierarchy.

From the main menu, you can choose to display the borrowing menu or the lending menu. See Figure 9.1, "ILL Management Main Menu" (page 9–1).
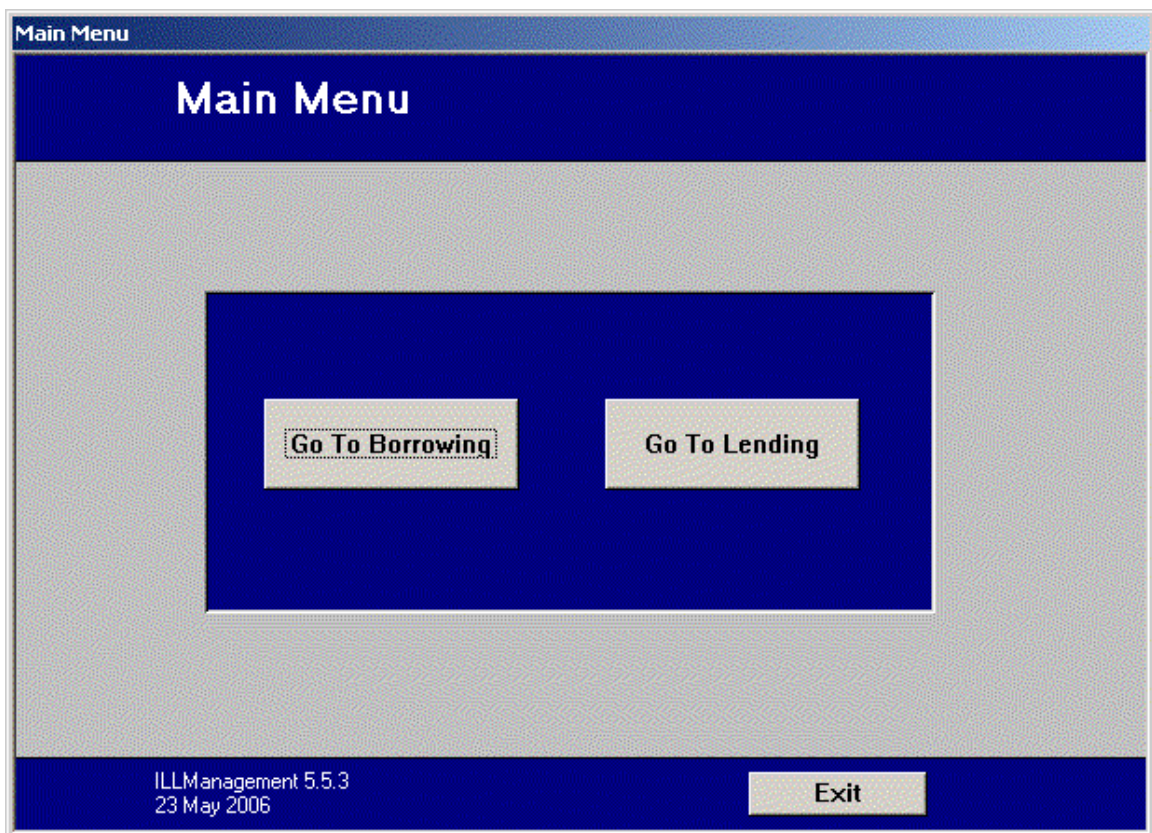
Figure 9.1. ILL Management Main Menu

9.2. Borrowing Introduction

Click the Go to Borrowing button on the Main Menu. The Borrowing Main Menu opens.

The first column provides access to the functions that read in, write out and process borrowing requests.

- OCLC - allows you to read in and write out your OCLC borrowing messages directly to OCLC.

- OCLC & ISO Items for Review - allows you to view and act on messages received from OCLC or via ISO communications with other libraries. You can update 'Conditional' messages to Yes or No, for example.

- ARTEmail items for Review - allows users of the British Library's ARTEmail system to review and act on replies received from the British Library.

- Prepare ALA Form - presents a screen that allows you to enter information for a request to be made by fax, phone, or mail

The second column of buttons on the Borrowing Main Menu allows you to update, search for and view all the details of any borrowing request, provides the functions to prepare and email borrowing requests, and send circulation updates to Voyager.

- Update Borrowing Requests - presents a screen that allows you to update the status of a request in the local database such as Change Pending to Received Copy or Received Loan to Returned. This is the function that you will use most often.

- Search Borrowing Requests - gives you access to all information relevant to a particular request using a wide variety of search criteria. You may also record payments you have made to other libraries for each request.

- Prepare Email Requests - allows you to create an ALA request to be sent via email directly to another library.

- Review Email Requests - will show you a summary of all unsent email requests. You may edit any part of the requests shown on this screen, select messages that are "ready to be sent", and send them from this screen. All email requests must be reviewed and sent from this screen.

- Send Circ Updates to Voyager - process circulation updates to the Voyager ILS.

The third column of buttons on the Borrowing Main Menu allows access to a series of utilities that assist you in the general upkeep of the Library and Patron databases, send overdue and recall notices and generate statistical reports.

- Search Library Database - gives you access to all information relevant to a particular library using a wide variety of search criteria. The Library database contains information for each library such as the address of the library, billing method, customary charges and group data.

- Search Patron Database - gives you access to all information relevant to a patron using a wide variety of search criteria.

- Overdue/Recall Notices - produces overdue, recall, and renewal notices per patron.

- Statistics allows you to generate and customize a wide variety of built in reports.

9.3. Receiving Updates from OCLC

ILL contains the tools needed to communicate directly with OCLC to receive and send updates to requests. Click the OCLC button on the Main Borrowing screen. The OCLC Borrowing screen displays.

The top portion of the screen is used to control downloading messages from OCLC. There are check boxes available to allow you to select the message categories you wish to receive. Select the ones that you want to

read. (If you click the Set as default button, those check boxes that you have checked will always appear as checked when you open the form.)

New in ILL 6.0 - download the Review file:

Some libraries allow patrons to submit borrowing requests directly to OCLC using their WorldCat Resource Sharing (WRS) account. These requests are usually sent to the library's Review File in WRS. For a variety of reasons, some libraries wish to have a record of these requests at this stage of processing. ILL now has a check box on the OCLC Borrowing screen to allow the Review File to be downloaded. You can search for these entries using the Borrowing Search screen.

Figure 9.2. Review Checkbox

Click the Read New Borrowing Messages from OCLC link. Communications will commence and the Status box on the lower left will display what is happening. For example:
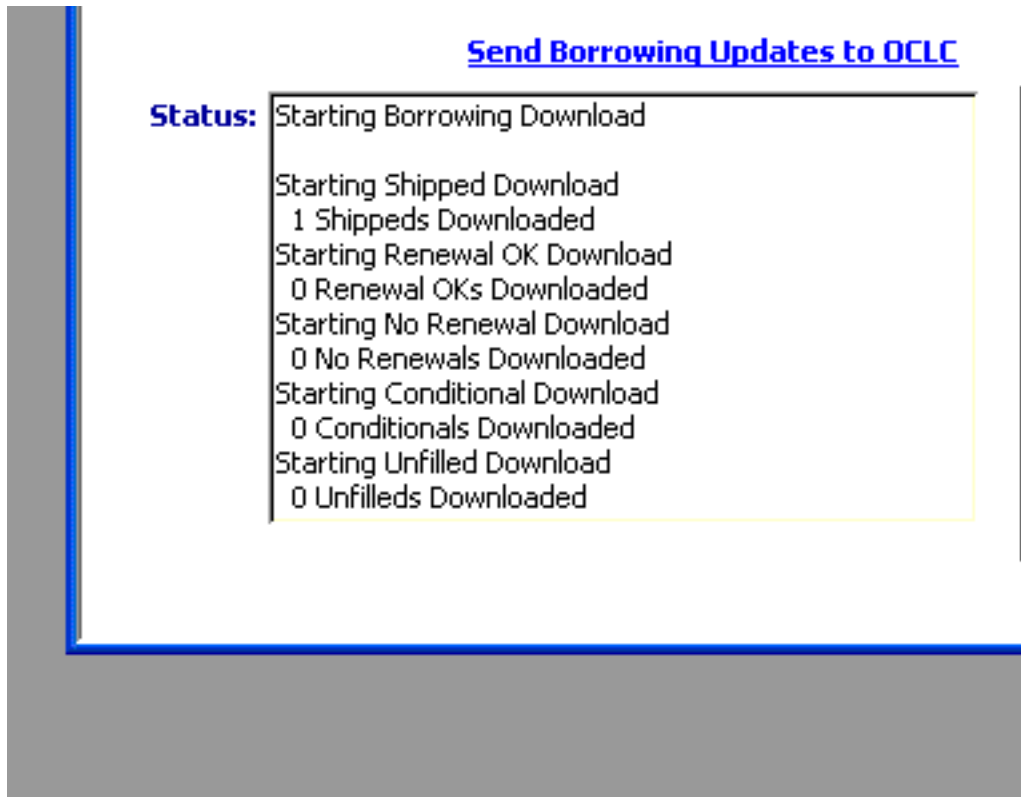
Figure 9.3. OCLC Status

You may need to click in the Status box to activate the scroll bar to see the very end of the dialog.

Some users wish to have a printed copy of all new borrowing requests. These users normally file the printed copies until the requested item arrives or the request is cancelled. Checking the box in the upper right hand corner of the screen will queue the new requests for printing. Click the Print New Requests button when you want to print them. Most users find that printing these requests is unnecessary.

9.4. Items for Review

The OCLC & ISO Items for Review screens on both the Borrowing and Lending sides of ILL would likely be the next place you would deal with some requests after sending them off to OCLC or to other libraries via ISO communications. The Borrowing version of the Items for Review screen is shown in Figure 9.4, "Borrowing Items for Review" (page 9–5).

Figure 9.4. Borrowing Items for Review

This screen is designed primarily for the purpose of alerting you to requests that require some action on your part. For example, if you receive a Conditional response from a potential lender about a request you produced with OCLC yesterday, you need to reply with either a Yes or No. This example shows that there are 2 Conditionals waiting for your attention. There is a summary of each in the list box at the top of the screen. If you click on an individual request in this list, you will see the details below. In this example the Lender is asking for $25.00 for a loan. If you wish to agree to that, click Reply Yes, if not click Reply No. In either case, the request will be queued for transmission to OCLC. Buttons for appropriate responses or actions are shown for each type of message that requires your attention. You may also enter notes or comments for each request at this point that will be included in any response message sent.

Another new ILL capability shown on this screen is the Make New Request button. If a request has gone Unfilled (recent ones will be shown by clicking on the Unfilled button on the left) you can create a new request by clicking this button. It will appear in ILL Request on the same workstation ready to go.

9.5. Updating Borrowing Requests

Clicking the Update Borrowing Requests button on the Borrowing Main screen displays the Update Borrowing Requests screen (see Figure 9.5, "Update Borrowing Requests" (page 9–6)). You can perform all of your borrowing request status updates on this screen. Some updates, as we have seen earlier, can also be done on the Review screen. This means that it does not matter where the items came from or how they were requested: OCLC, Docline, ALA form, and email, whatever.

Figure 9.5. Update Borrowing Requests

This screen is designed to make this work as quick and efficient as possible. Accordingly, the presumption here is that you will process updates in batches. That is, you will enter updates for a whole stack of books that just arrived all at once, and for a batch of books that you are returning at another time. The procedure is pretty simple: set the status setting to whatever status you need, enter in the ILL number of a request by typing it or using a barcode scanner. You will notice that depending upon the status you have selected, various fields will be displayed for you. The idea here is to reduce clutter and show you only the fields you need for the work you are doing, eliminating the need to squint at a crowded screen full of data to find just the one bit of data you need.

Some users may have different Branches of the library doing updates. If you wish to keep track of which Branch updated the record, there is a Branch ID field at the top of the screen. You can set the default Branch ID with one of the items under the Preferences menu.

At the bottom of the screen, you can choose to e-mail or print out an arrival notice for the patron or to print a bookstrap for returnable items or a photocopy cover sheet for photocopies (you have the choice to do this for each item individually). When you are satisfied with an update, click on the Accept button at the bottom of the screen or just hit the enter key on your keyboard. The updated information is saved and the fields on the screen are cleared and ready for your next update. The status button remains at the position you selected earlier.

One subtle but handy added feature is the Completed Requests box at the lower right-perfect for those times when you get called away from your desk in the middle of a session of updates, only to return hours later unable to remember which pile of books had been updated already and which hasn't.

Preferences for the patron notices, bookstraps and photocopy coversheets can be found under the Preferences/NoticesCustomize menu. Patron notices may be emailed or printed. Bookstraps may be full page sheets or small removable stick on labels (Avery #6464, or equivalent).

9.6. Sending Updates

This section describes sending updates to OCLC and other suppliers.

9.6.1. Sending Updates to OCLC

Once you've done the data entry, it's time to send that data wherever it needs to go. On the Borrowing side of ILL, you only need to take action to send update messages for OCLC requests.

Clicking the OCLC button on the Borrowing Main Menu brings up the OCLC Borrowing screen, shown earlier.

The lower right portion of the OCLC Borrowing screen (see Figure 9.6, "Items Waiting to be Sent" (page 9–7)) shows you the number and type of updates ready to be sent to OCLC.

Items waiting to be sent

Received	2
Returned	1
Renewal Request	0
Yes Cond	0
No Cond	0
No Received	0
Delete	1

[Close]
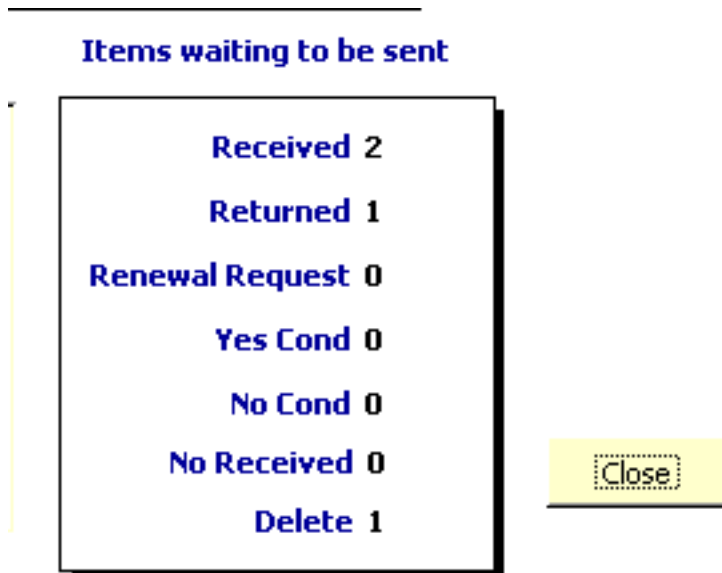
Figure 9.6. Items Waiting to be Sent

When you are ready to send them, click the link labeled Send Borrowing Updates to OCLC and they will be sent. Progress updates will appear in the Status box.

9.6.2. Updates for Other Suppliers

For Docline and ALA-type requests, the status updates you make are basically for your own benefit since Docline doesn't require any further action once an item is sent to a borrower and there isn't any formal method for sending status updates to an ALA-form lender.

When items arrive and are returned, however, you will need to update the status of the requests in your ILL database to reflect those changes. It is important to update borrowing requests to a completed status in ILL. Borrowing requests that have a completed status are available for ILL reports and can be archived. Statuses that ILL considers to be complete are the following local statuses: RecCopy, Returned, Cancelled, and Unfilled.

ISO communications happen automatically, so you don't need to take any action for that type of messaging, either.

9.7. Using the Borrowing Request Database

This section describes searching for requests and paying your bills.

9.7.1. Searching for Requests

The search buttons on the Main Borrowing screen open screens that allow you to easily conduct powerful searches of your borrowing request, library and patron databases. Each screen provides an English-like method of constructing search criteria to allow you to find the information you need. All three operate in a similar manner.

Click the Search Borrowing Requests button. The Borrowing Requests Search screen displays. See Figure 9.7, "Borrowing Request Search" (page 9–8).

Figure 9.7. Borrowing Request Search

When the Borrowing Request Search window displays, you see all your requests that have not been archived. These are sorted by request date in descending order. The latest requests are first.

> **Note**
>
> There is a column for article title that displays next to the journal title in the list provided.

If you double-click the ILL Number of an individual line in the summary section, the BorrowingRequestDetails dialog box displays (see Figure 9.8, "Borrowing Request Details" (page 9–9)) where you can see all of the details of an individual request.

Figure 9.8. Borrowing Request Details

Note

The Chaser Date field has been added in 6.1. This is useful for requests sent to the British Library.

Use the Reset Search button to reset the screen to display all non-archived requests.

The example in Figure 9.9, "Borrowing Request Search Results by Date" (page 9–9) shows the result for searching for all requests with a request date of 5/17/2010 and sorting the results by patron name.

Figure 9.9. Borrowing Request Search Results by Date

The Sort By combo box allows you to sort the displayed requests by ILL number, Patron, Title or Status.

You can use the More Choices button to build up more sophisticated queries. This can be useful when you have a very specific statistics question, database maintenance or need to find an illusive request.

Searches on this screen, and all of the other search screens in ILL, always assume a wild card character at the end of any text string used for a search. For example, if you enter Patron equals Sch the result will include patrons with names such as Schula and Schwind. You can also search for records even if you do not know where the word occurs in the field you are searching on. If you know that the Title contains the word Canada, you can enter Title equals *Canada. By pre-pending an asterisk, ILL will find all records with the character string canada anywhere in the Title field.

The square button with an Excel logo allows you to export a selected set of data to an Excel spreadsheet. If you have Microsoft Excel installed on your machine and are familiar with it, you can look at the results using Excel - the spreadsheet ILL creates will be named Borsrch.xls.

Finally, if you check the Include requests from the Archive check box, ILL will include any requests from the Borrowing Request Archive table that meet the criteria you have selected for the search.

9.7.2. Paying Your Bills

The Borrowing Request Search screen is also used to keep track of the bills you have to pay. You can record or update lending charges, whether you have paid it or not, the date that you paid it and the check number you used to pay the lending charges. The light blue area on the form can be edited with this information. The lending charges field is automatically filled in initially with information from the updates you download from OCLC.

You can use the search screen to find items that are unpaid or from a specific Lender which are still unpaid or paid to a specific Lender. Figure 9.10, "Borrowing Request Search - Find Unpaid Charges" (page 9–10) displays the settings that would be entered to find the charges that have not been paid to the lender INT.

Figure 9.10. Borrowing Request Search - Find Unpaid Charges

9.8. Send Circ Updates to Voyager (Overview)

After updating borrowing requests, you must send the updates to the Voyager Circulation module to create records and items for received ILL materials, as well as delete the Voyager records and items of returned ILL items (if your library is enabling automatic deletion of created items and records upon return, for more see the Send Shipped To Voyager field description in Table 4.1, "Voyager NCIP Preferences" (page 4–5)).

The Send Circ Updates to Voyager functionality is accessed from the Borrowing section of ILL Management.

The procedure for sending Circ updates to Voyager is shown in Sending Circulation Updates to Voyager (page 9–11).

Procedure 9.1. Sending Circulation Updates to Voyager

Use the following to send circulation updates to Voyager Circulation:

1. Open the ILL Management client using the ILL Management button. See Figure 9.11, "ILL Management Button" (page 9–11).

Figure 9.11. ILL Management Button

Result

The ILL Management Main Menu opens. See Figure 9.12, "ILL Management Main Menu" (page 9–11).
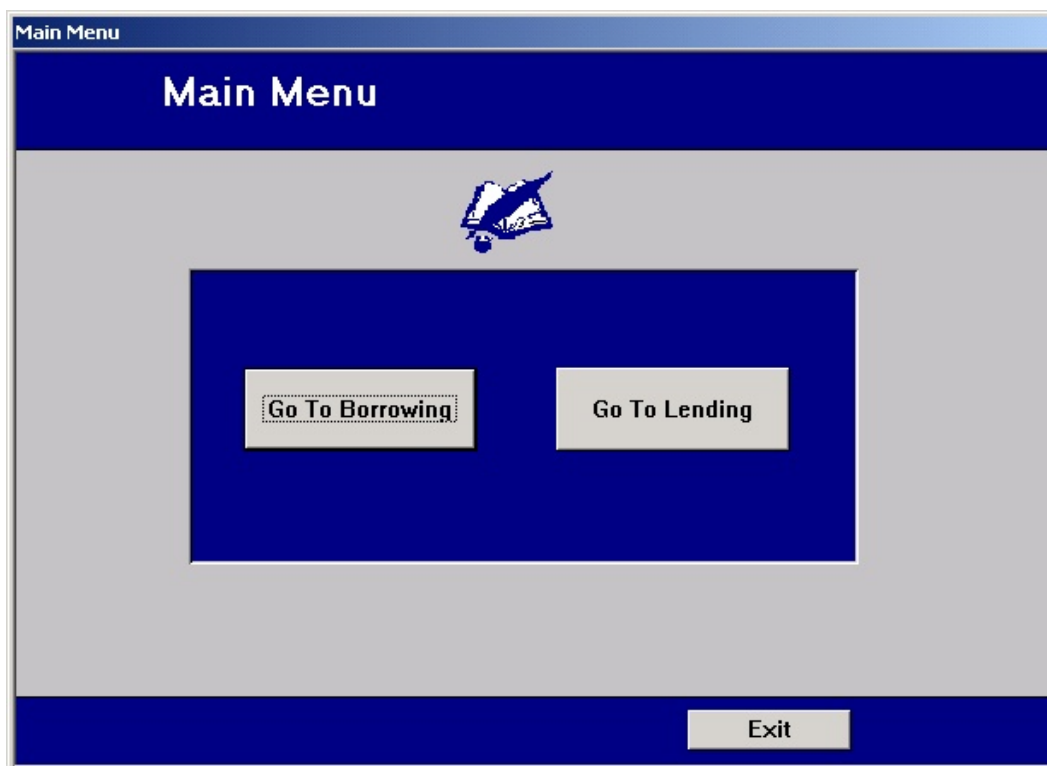

Figure 9.12. ILL Management Main Menu

2. Click Go To Borrowing.

Result

The Borrowing Main Menu screen opens.

3.   Click Send Circ Updates to Voyager.

Result

The Voyager Updates to Send dialog box opens. See Figure 9.13, "Voyager Updates to Send dialog box" (page 9–12).
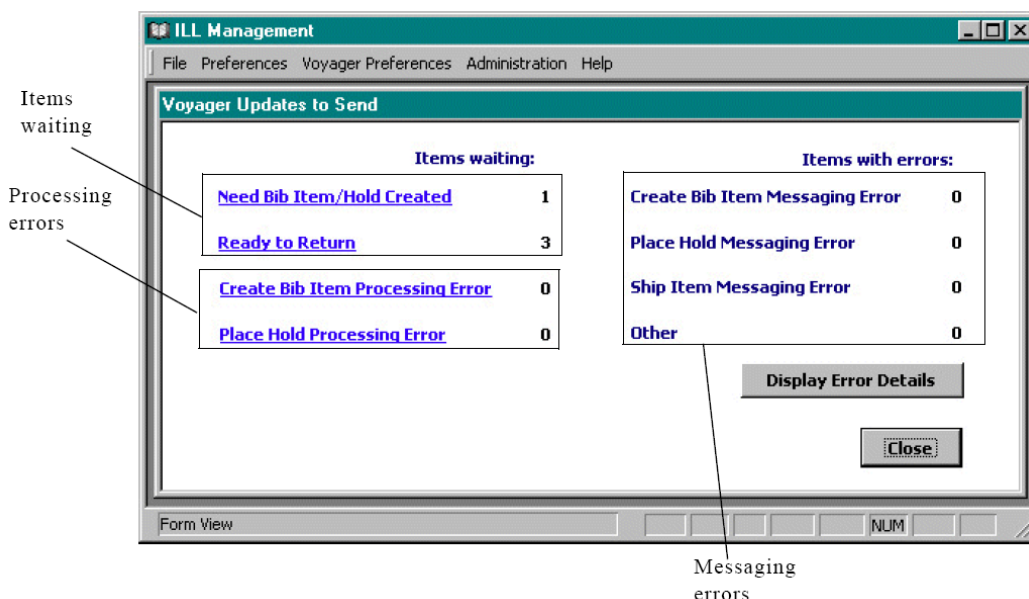
Figure 9.13. Voyager Updates to Send dialog box

This dialog box indicates what types of updates are waiting to be sent to the NCIP server, and on to Voyager Circulation, and potential error messages associated with the NCIP messaging between the ILL Management client (on your desktop), the NCIP server, and the Voyager Circulation server.

9.8.1. Items Waiting

The Items Waiting section lists the number of items waiting to be updated in Voyager Circulation, using NCIP messaging. This includes the information in Figure 9.13, "Voyager Updates to Send dialog box" (page 9–12).

Table 9.1. Items Waiting Hyperlinks

Information	Description
Need Bib Item/Hold Created	These are the ILL items which have been designated as "received" in the Borrowing section of ILL Management, and are ready to have bibliographic and Voyager item records created and holds placed on those items.
Ready to Return	These are ILL items which have been given a status

Information	Description
	of "returned" in the the Borrowing section of ILL Management. The corresponding Voyager records which were created after these ILL items were received are deleted when you run the Ready to Return update.

The records are not deleted unless you have enabled automatic deletion of created items and records upon return, by checking the Send Shipped to Voyager check box in the Voyager NCIP Preferences section of ILL Management (for more see the Send Shipped To Voyager field description in Table 4.1, "Voyager NCIP Preferences" (page 4–5)).

9.8.2. Processing Errors

When updating Voyager Circulation, ILL Management formulates the instructions to the Voyager Circulation server in XML format compliant with the NISO Circulation Interchange Protocol (NCIP). This message is sent to the NCIP server which parses the message and performs the necessary procedures on the Voyager Circulation server.

Processing errors occur when the NCIP message sent to the NCIP server is understood by the NCIP server, but there is a problem performing the Need Bib Item/Hold Created or Ready to Return functions for some reason. Typically, this is because of a conflict with the function being performed and Voyager-specific requirements.

For instance, if the Patron ID used as the UserName in the Voyager NCIP Preferences screen of ILL Management, does not have sufficient privilege to delete records, the Ready to Return function, when run, delivers a processing error. When the NCIP server instructs Voyager Circulation to delete the records using the UserName, Voyager Circulation indicates to the NCIP server that it is unable to delete the records due to the insufficient privilege of the Voyager Circulation Operator ID to delete records.

Detailed information about processing errors can be obtained by viewing the log.ncip file. This file resides in the /m1/voyager/xxxdb/log directory on your Voyager server.

Each NCIP messaging session is logged into the log.ncip file according to the format in Figure 9.14, "Basic structure of NCIP messaging session in the log.ncip file" (page 9–13), Figure 9.15, "Sample log.ncip error message in which patron is blocked from placing holds" (page 9–13), and Figure 9.16, "Sample log.ncip error message in which the item to be processed (deleted or held) is not found" (page 9–14) that show sample processing error messages.

```
Thu Dec 6 14:25:52 2001 Begin Session
No Requests Found.
Thu Dec 6 14:27:28 2001 End Session
```

Figure 9.14. Basic structure of NCIP messaging session in the log.ncip file

The session beginning and end display, and a No Requests Found message displays when there are no more requests to be processed, before the end of session.

```
Wed Jan 23 13:45:25 2002 Begin Session
Patron blocked from placing hold requests.
No Requests Found.
Wed Jan 23 13:45:30 2002 End Session
```

Figure 9.15. Sample log.ncip error message in which patron is blocked from placing holds

```
Wed Jan 23 14:26:14 2002 Begin Session
Item not found.
No Requests Found.
Wed Jan 23 14:26:19 2002 End Session
```

Figure 9.16. Sample log.ncip error message in which the item to be processed (deleted or held) is not found

9.8.3. Messaging Errors

When updating Voyager Circulation, ILL Management formulates the instructions to the Voyager Circulation server in XML format compliant with the NISO Circulation Interchange Protocol (NCIP). This message is sent to the NCIP server which parses the message and performs the necessary procedures on the Voyager Circulation server.

Messaging errors occur when the NCIP message sent to the NCIP server is not understood by the NCIP server. The most common cause of this type of error is information missing from a required field. If information is missing from a required field, that information is not included in the NCIP message sent to the NCIP server. Since the message is not complete, the NCIP server cannot parse it and returns a messaging error.

If you receive messaging errors, call Customer Support.

9.8.4. Sending Circ Updates to Voyager

The procedure for sending Circulation updates to Voyager is shown in Sending Circ Updates to Voyager (page 9–14).

Procedure 9.2. Sending Circ Updates to Voyager

Use the following to send ILL Updates to Voyager Circulation:

1. Open the ILL Management client using the ILL Management button. See Figure 9.17, "ILL Management Button" (page 9–14).

Figure 9.17. ILL Management Button

Result

The ILL Management Main Menu opens. See Figure 9.18, "ILL Management Main Menu" (page 9–15).
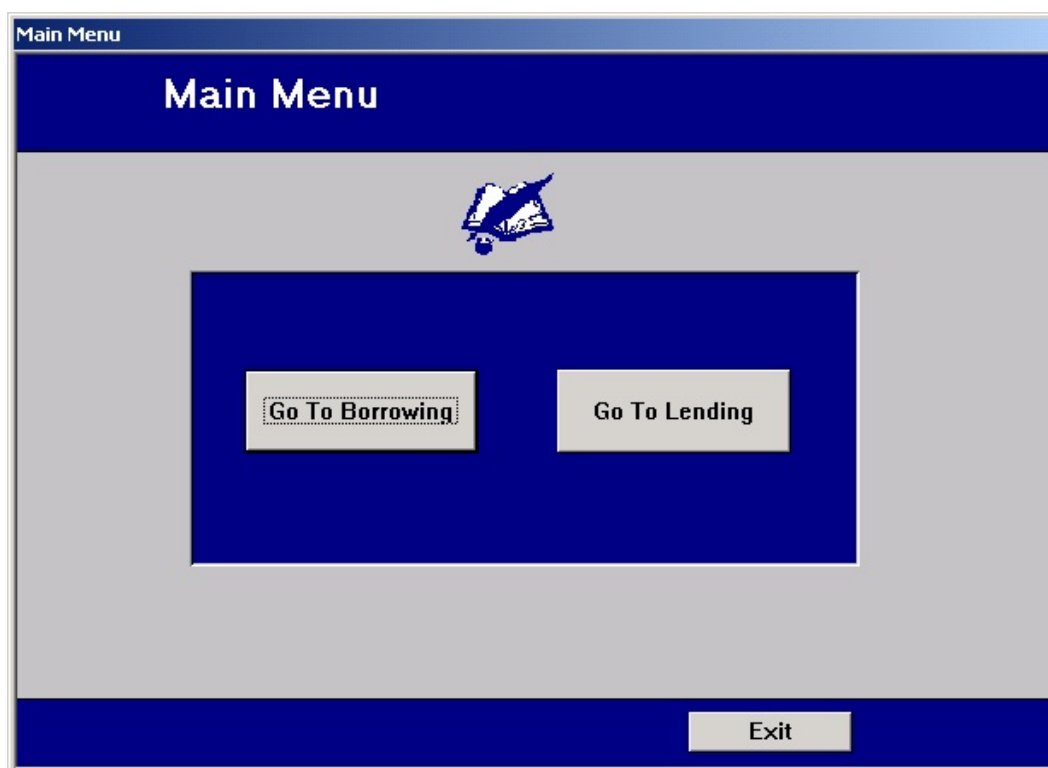
Figure 9.18. ILL Management Main Menu

2.   Click the Go To Borrowing button.

Result

The Borrowing Main Menu screen opens.

3.   Click the Send Circ Updates to Voyager button.

Result

The Voyager Updates to Send dialog box opens. See Figure 9.19, "Voyager Updates to Send dialog box" (page 9–16).
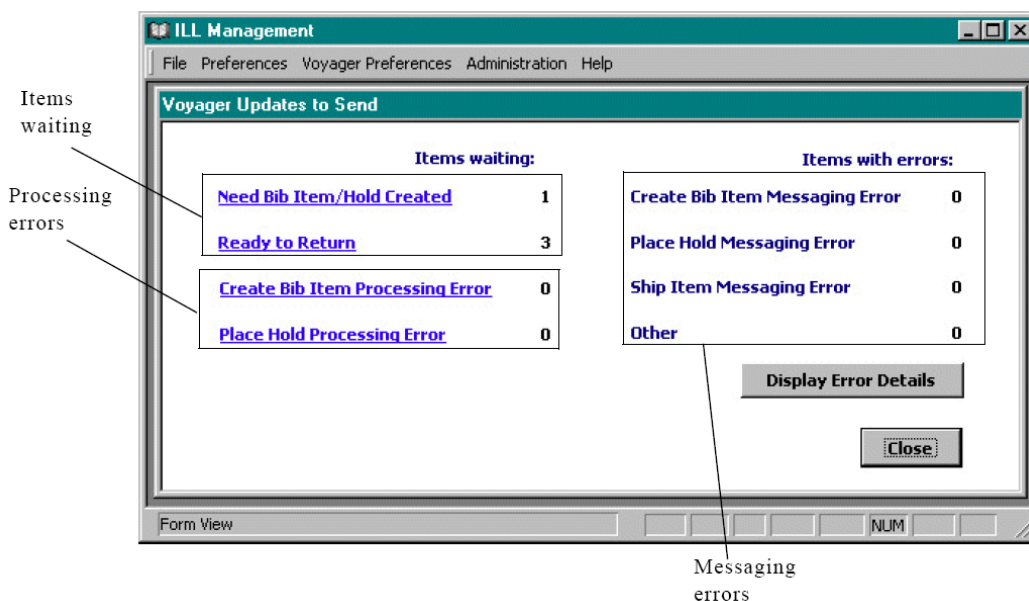
Figure 9.19. Voyager Updates to Send dialog box

4. If you are sending updates to Voyager Circulation to create records and place holds, click the Need Bib Item/Hold Created hypertext in the Items waiting section.

   If you are sending updates to Voyager Circulation to delete previously created records, click the Ready to Return hypertext in the Items waiting section.

Result

A Voyager Connect dialog box opens. See Figure 9.20, "Voyager Connect dialog box" (page 9–?).

Note

When creating and deleting numerous records via Send Circ Updates to Voyager, the text box is truncated to the last 100 characters which allows you to send approximately 10 updates to Voyager at a time. Also, the title of NCIP messages sent to Voyager is truncated at 110 characters.
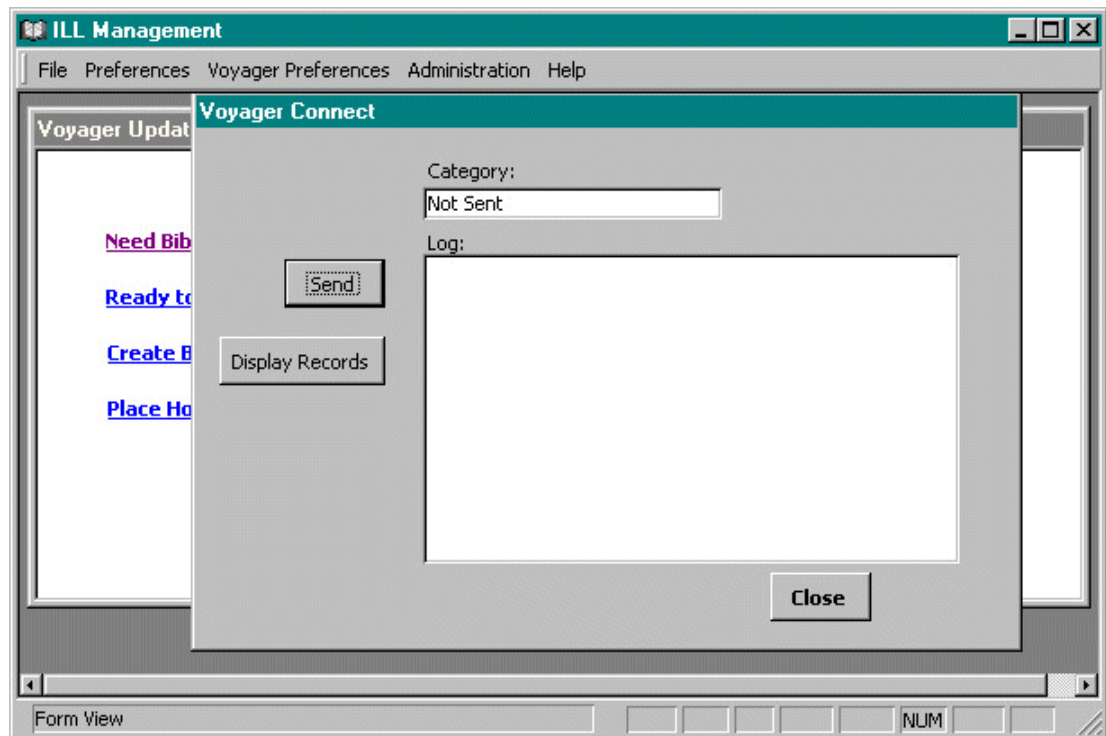
Figure 9.20. Voyager Connect dialog box

5. Click the Display Records button.

Result

This invokes a Records to send dialog box, which displays information about the ILL record(s) to be sent to the voyager. Figure 9.21, "Voyager Connect>Records to Send dialog box (Need Bib Item/Hold Created)" (page 9–18) shows the Records to Send dialog box for a Need Bib Item/Hold Created request. Figure 9.22, "Voyager Connect>Records to Send dialog box (Ready to Return)" (page 9–19) shows the Records to Send dialog box for a Ready to Return request.

If a Voyager item has not been created for that ILL record, the Voyager Item ID field is empty.
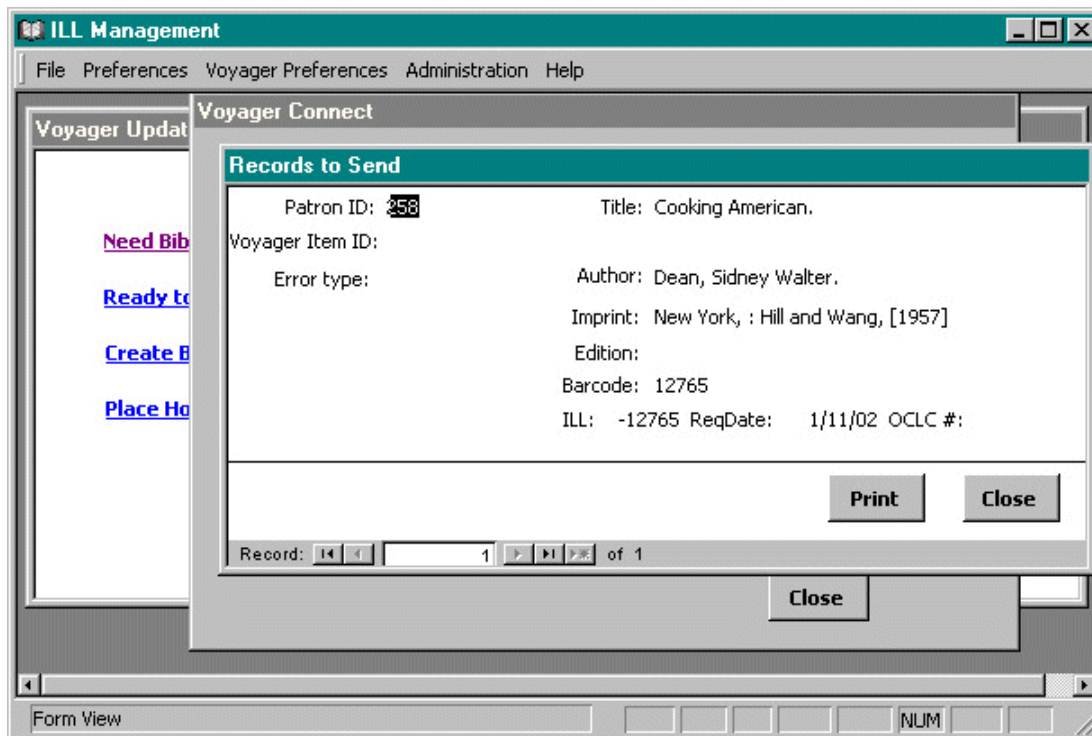
Figure 9.21. Voyager Connect>Records to Send dialog box (Need Bib Item/Hold Created)
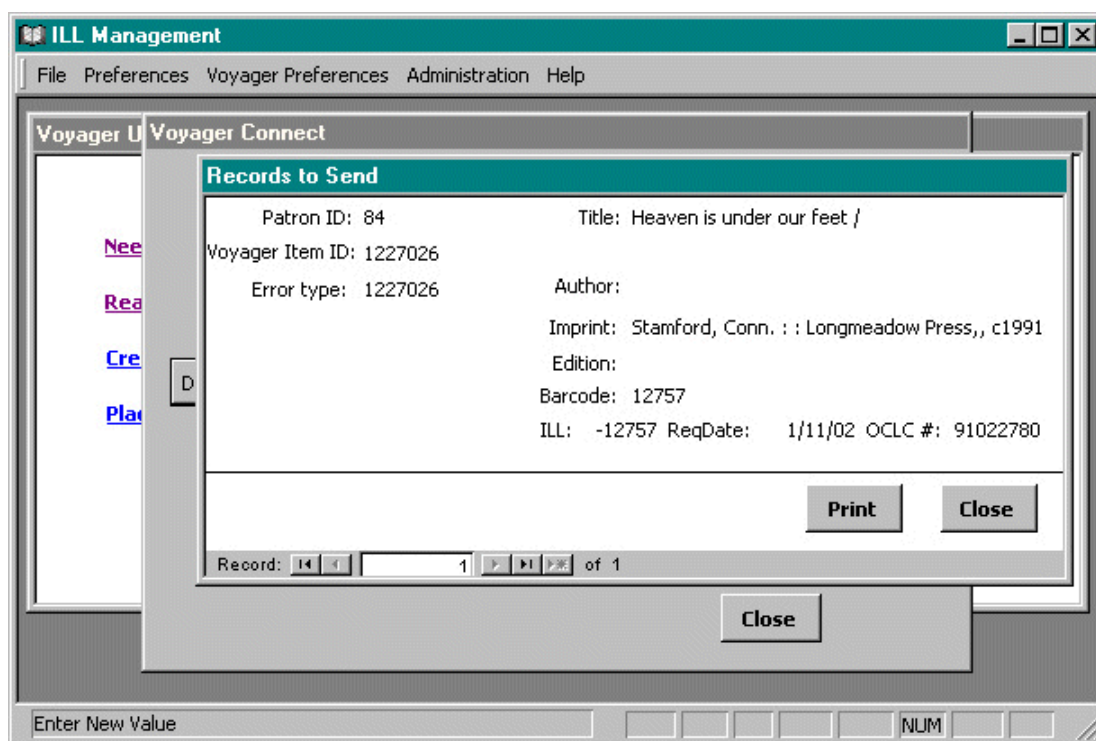
Figure 9.22. Voyager Connect>Records to Send dialog box (Ready to Return)

6. If you are viewing a Records to Send dialog box, click the Close button to return to the Voyager Connect screen.

7. To send the requests, from the Voyager Connect screen, click the Send button.

    Result

    A messaging dialog opens which notifies you of the progress of the messaging process. See Figure 9.23, "Sample Voyager Connect messaging status display" (page 9–20).
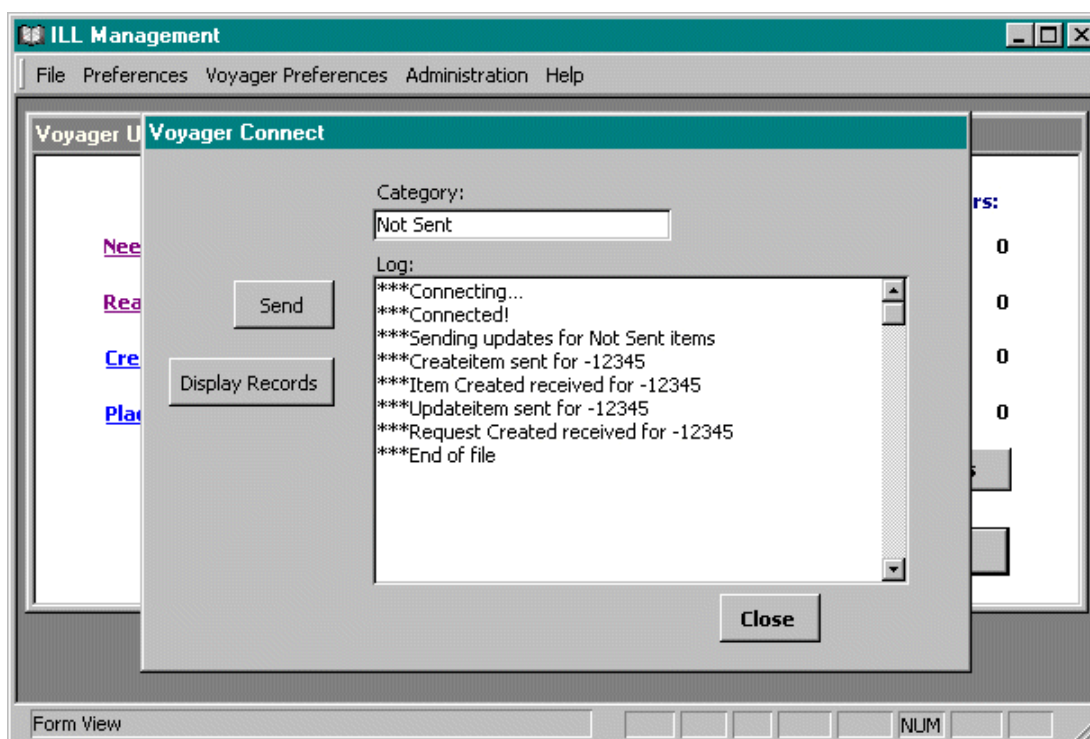
Figure 9.23. Sample Voyager Connect messaging status display

8. When finished, click the Close button to return to the Voyager Updates to Send dialog box.

   You can check processing errors at any time by clicking the hyperlinked text of either of the messaging error types. For more information on Processing errors, see Section 9.8.2, "Processing Errors" (page 9–13).

9.9. The Library Database

Clicking the Search Library Database button on the Borrowing Main Menu displays the Library Search screen. See Figure 9.24, "Library Search" (page 9–21).

Figure 9.24. Library Search

This screen allows you to search the library database using a variety of criteria as described in the Borrowing Request Search section above. The symbol and name are the most likely choices, but other fields contained in the combo box are also available.

When you click the Find Them Now button, you initiate a search of the library database. The lower section contains the results of such a search. The list contains all libraries that met the specified criteria. (You may browse through the scrolling box by manipulating the scroll bar on the right if there are more than 5 libraries.) There is a Print button at the bottom of the screen. The screen below shows the result of a search for any library whose name contains the character string Wash.

As with the Borrowing search, this particular type of search was done by pre-pending and asterisk to the beginning of the character string of interest. The asterisk serves as a wild card character for the search. Searches will always assume an asterisk at the end of a search. So, a search *Wash would find all libraries whose name contains Wash. See Figure 9.25, "Library Search Using Wild Card" (page 9–22).

Figure 9.25. Library Search Using Wild Card

As indicated by the instruction line, you may double click a Library Symbol in the column below the arrow to see the details for that particular library, as shown in Figure 9.26, "Library Search - Double Click for Details" (page 9–23).

Figure 9.26. Library Search - Double Click for Details

To prevent accidental changes, all the fields are in display-only mode when the screen displays. You cannot type new information into them. Close merely closes the window and does not affect the contents of the database.

When you want to make changes, click on the Edit Record button and you may then change the contents of any field except the symbol field. The column containing an arrow at the left side on the screen displays only during edit mode. This is a visual clue that you may change fields.

When you have filled in all fields that are possible (or desired), check the box in the lower right, labeled Updates Complete. When you have checked this box, you will no longer be asked if you want to edit this library record when updating requests from this library.

In addition to maintaining library contact information, you can create and manage library groups on this screen. These groups can be used for statistical reports, to help you obtain the statistics that will be most useful to you. For example, you could create one group for out-of-state libraries, one for nearby partner libraries, and one for in-state public libraries. Any groups you have already created in ILL will be listed in the Assign to Group combo box; you may choose one or more of these for any library, or enter the name of a new group that will be added to your already existing groups.

To print a copy of the library record, choose Print from the File Menu at the top of your ILL screen.

When you click the Close button any changes are saved in ILL's database. If you want to abandon changes typed in but not yet saved, click the Cancel Edits button to restore the original information. It is safe to close the screen at that point. There will be no changes to the database.

9.10. ILL's Patron Database and Patron Matching

ILL can maintain a separate database of information about your patrons. If you choose to have ILL maintain a patron database, ILL will associate each borrowing request with a particular patron record in your database.

We recommend using this capability for only our smallest customers, those with an active user base of no more than a few hundred patrons. In this kind of environment, where ILL staff will know most of their patrons on a first-name basis, requiring patrons to fill out a complete set of name/address/ID information with each ILL request would be onerous and unnecessary, but it would still be useful to have that kind of data someplace where ILL could use it to do things like email arrival or overdue notices. For these environments, ILL's patron database is quite useful, requiring patrons to essentially sign up for ILL services once with their email address, physical address, phone and fax numbers, campus ID number, and so on. Thereafter, they can submit requests to the ILL office as Ray or Susan and the staffers will know who they are and can tell ILL which patron record to use. This step is called patron matching and it happens whenever data about new borrowing requests arrives in ILL.

For most of our customers, the relationship between ILL staff and patrons is nowhere near that personal. ILL staff deal with an active patron population in the hundreds or thousands, with potential ILL users numbering in the tens of thousands. In this environment, complete patron identification information is naturally required with every borrowing request. Since you are getting a complete and current set of patron information for free with every request, it makes very little sense to bother with maintaining a patron database in ILL. The patron matching process in this kind of environment (where there might be 50 Smiths in your database) would also be much more time consuming. Since ILL is capable of doing everything it needs to do, from emailing notices to doing reports based on patrons' department or status affiliations, using patron information solely from the Borrowing Requests table, there really is no need to even consider maintaining a patron database in ILL for all but our smallest customers.

You must tell ILL how you want to deal with this patron issue. On the Preferences menu, select the Patron item. The Patron Preferences screen displays. See Figure 9.27, "Patron Preferences" (page 9–25).

Figure 9.27. Patron Preferences

The first selection about where Dept and Status are stored is obsolete and will be removed in the next release.

If you do not want to keep a patron database in ILL, click the button that says, "I DON'T want to maintain a Patron database."

If you do decide to maintain a patron database be sure to select from the Preferences/Patron the following options:

• I DO want to maintain a Patron Database.

• The method you want to use to match: Either Patron ID or Last Name, First Name AND Department or both (The optimum patron matching is done with a patron ID. If you enter this type of information when making requests use it to match to the patron record.)

Searching the Patron Database:

This search function allows you to gain access to specific Patron records to add, correct or verify addresses and phone numbers or delete old Patron records. It also provides access to the Patron Matching screen where you can add new Patrons.

9.11. Overdue and Recall Notices

Clicking the Overdue/Recall Notices button on the Borrowing Main Menu presents the Borrowing Notices screen.

Here you can print out or email first overdue notices, or print second overdue, first and second recall, renewal OK and no renewal notices that can be sent to patrons. See Figure 9.28, "Overdue Notices" (page 9–?). The screen provides a control box to allow you to set the number of days past due for the first overdue or the number of days since the first overdue/recall for the second overdue/recall. The default time periods and the wording of the notices can be set in the Notices - Archive and Notices - Customize sections of ILL's Preferences. Before printing First Recalls, RenewalOKs and NoRenewals, remember to download the corresponding message categories from OCLC.
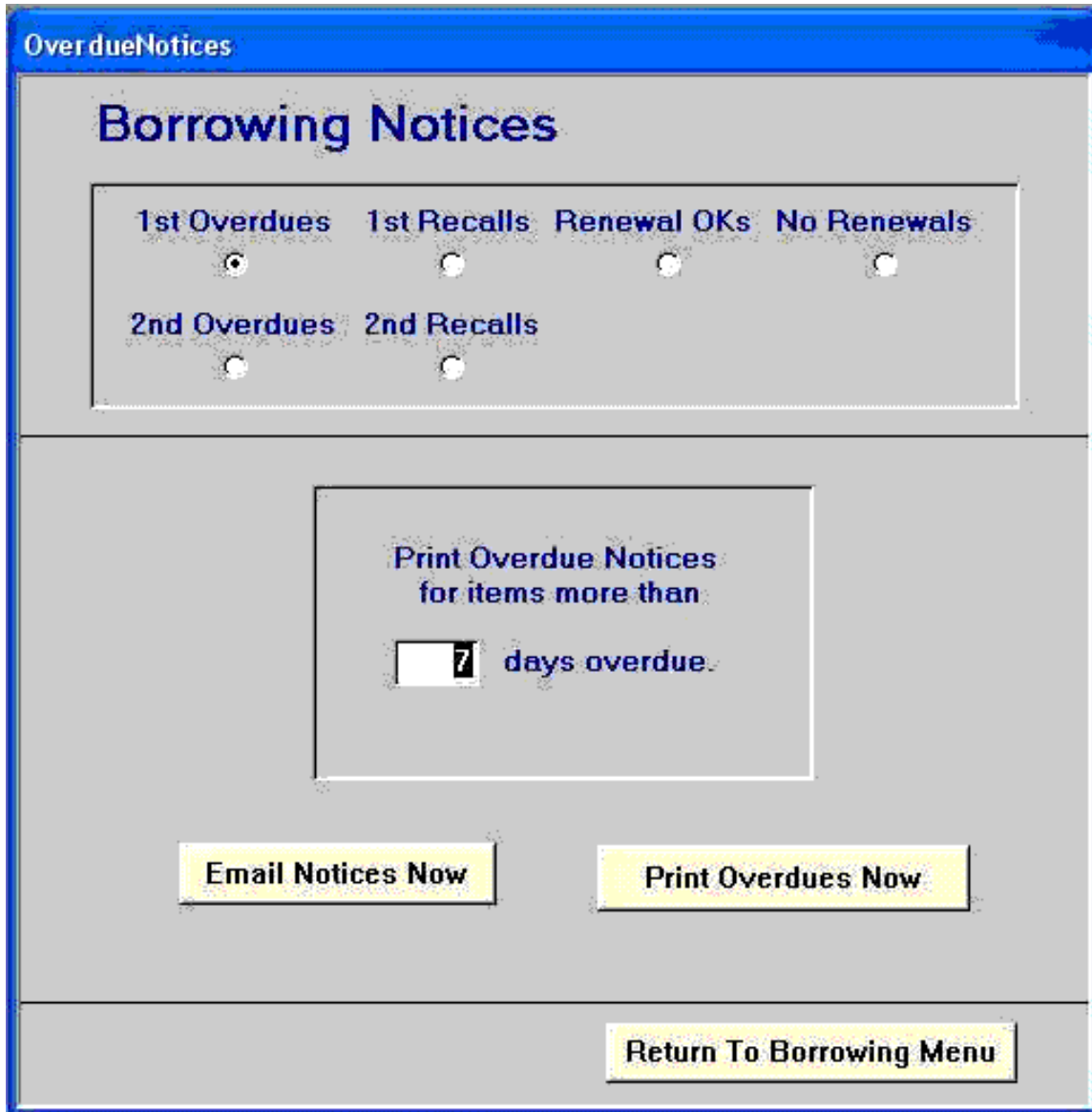

Figure 9.28. Overdue Notices

If you want email notices to be created for patrons who have email addresses you will need to click on the Email Notices Now button FIRST before you click on the Print Overdues Now button. When you click on the Email Notices Now button emails will be sent to patrons that had email addresses in the particular bor-

rowing request records or in their patron records. Once email overdue notices have been sent then you will need to click on the Print Overdues Now button to print the overdue notices for those patrons/items that did not have email addresses available. If you do not want to email any overdue notices and just want to print out all overdue notices instead, then just click the Print Overdues Now button first.

9.12. Entering New Requests in ILL

This section describes ALA requests, preparing email requests, and reviewing email requests.

9.12.1. ALA Requests

Clicking the Prepare ALA Form button on the Borrowing Main Menu screen presents you with the Prepare ALA Form screen.

This screen allows you to enter information about a request to be made by fax, phone, or mail (ALA form requests to be sent via email are created in a separate screen). ILL automatically assigns a local unique ILL number that you may not change since it uniquely identifies a request.

Prior to entering information about the request, select the type of Request For option: Photocopy or Loan. See Figure 9.29, "Request For Options" (page 9–27).

Figure 9.29. Request For Options

Two fields must be filled in: the title and the library. The Lender field is blank when the screen appears. If ILL has seen the library before, there will be a symbol in the database that has been assigned to the library to which you wish to send the request. To find the symbol for a previously seen library, you may click the Search Libraries button. ILL will present the Library Search screen as described previously. When you locate the correct symbol, return to the Prepare ALA Form screen, and enter the symbol in the Lender text box.

If ILL does not have a record for the library, you may assign a non-numeric Library Symbol or you may click the Assign New Library Symbol button to tell ILL to generate and assign a new, numeric symbol for the library. ILL will ask you to supply the name of the library. When you save the request, ILL will allow you to enter more information into the Library Record.

The Clear Fields button blanks out all fields. The Save Request button enters the data into the local database, clears the form and generates a new number for the next request. If there are any problems, ILL will tell you and allow you to fix them. When the request is saved, you will have the option to print out an ALA form. Some of the information printed on these forms is set on the ALA Form Preferences screen.

The three checkboxes on the lower right (see Figure 9.30, "Save Request Options" (page 9–28)) alter the Save Request button function.

Figure 9.30. Save Request Options

These checkboxes allow you to leave the current lender symbol and/or bibliographic and/or Patron information in place. This is very useful when entering several requests to the same library, particularly several requests for items from the same journal.

9.12.2. Prepare Email Requests

Clicking on the Prepare Email Requests button on the Borrowing Main Menu screen brings you a screen very similar to the Prepare ALA Form screen. On this screen you can create a message to be emailed directly to another library. The lending library is selected from a drop-down list near the top of the screen. The email address of the library you select will be displayed beneath this box (you may edit the address if you wish). As on the ALA Form screen, there is a Clear Fields button at the bottom of the screen. Next to this button is the Save Request button: click this when you are done filling out the form. The request will not be sent right away: all ALA emails are sent from the next screen described below, the Review Email Requests screen.

9.12.3. Review Email Requests

Clicking the Review Email Requests button on the Borrowing Main Menu screen brings you a screen in which you can review, edit and send the ALA emails that are waiting to be sent. We have made sending these emails a two-step process so that you will be less likely to send messages prematurely or with errors and to allow you to send a batch of emails all at once. On this screen you will see a summary of all ALA emails waiting to be sent. You may view (and edit) the details of any message by double-clicking on it. To send some or all of the messages, place a check in the Ready box for all messages that you wish to send now and click the Send Requests button. The Mark All Not Ready removes the "Ready" check from all waiting messages. The Close button returns you to the Borrowing Main Menu.

Chapter 10. ILL Management - Functions: Lending

10.1. Overview

You can move between the Borrowing menu and the Lending menu by clicking the Go to Lending or Go to Borrowing buttons on each menu. The Lending menu is very similar to the Borrowing menu. The main difference is that now we are dealing with Lending requests such as requests from borrowing institutions for items that you own and may (or may not) lend to that institution.

Because the Lending functions are so similar to the Borrowing functions, you may be referred to the corresponding borrowing section in this user's guide; or if the differences are minor, they are noted.

To display the Lending Main Menu (Figure 10.1, "Lending Main Menu" (page 10–1)), click the Go to Lending button from either the ILL Management Main Menu or from the Borrowing Main menu.
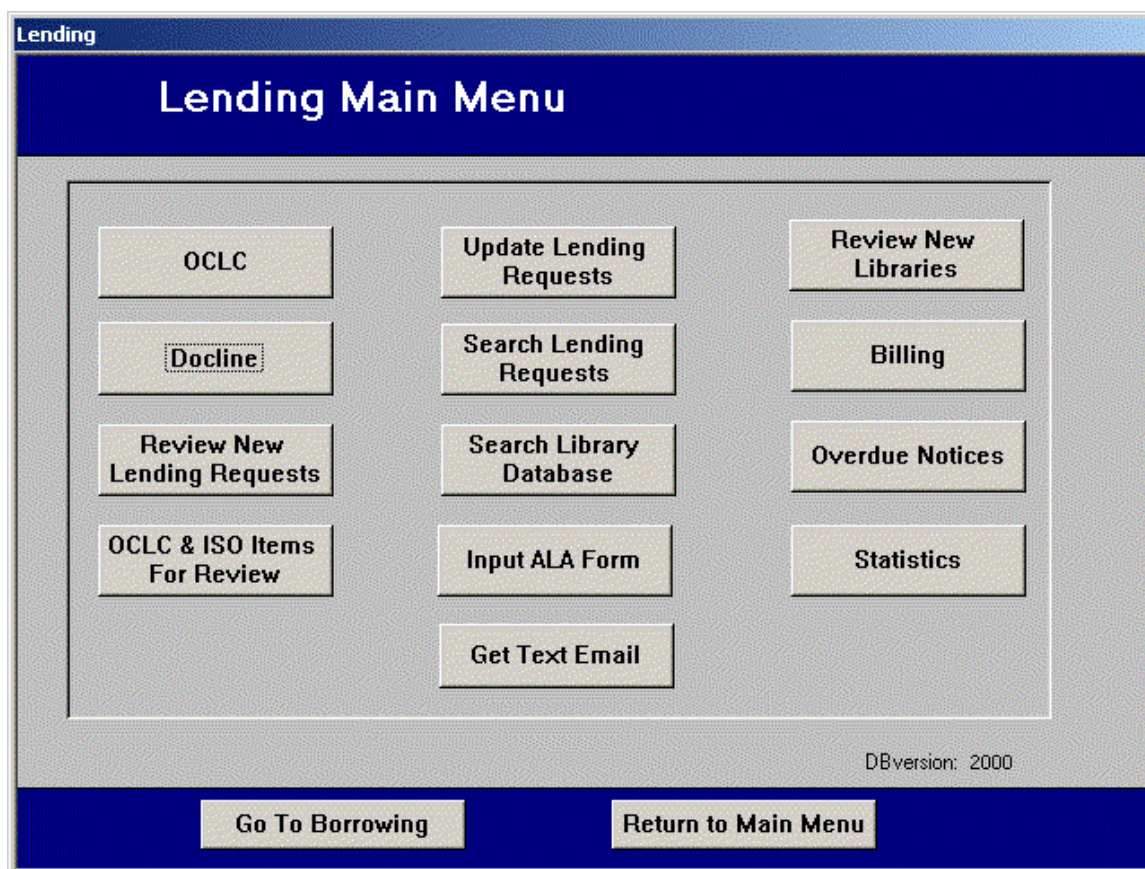

Figure 10.1. Lending Main Menu

The buttons in the first column allow selection of those functions that read in, write out, and process lending requests:

- OCLC - brings you to a screen where you may read in new messages from OCLC and send updates to OCLC.

- Docline - opens the Docline interface, where you may communicate with Docline with ILL doing much of the typing for you.

- Review New Lending Requests - opens a module that allows you to search your own catalog for the status, call number and location of requested items, generate No or Conditional responses for those requests, and print pick slips for items that you wish to fill.

- OCLC & ISO Items for Review - opens the screen that allows you to respond to messages received from OCLC or directly from other libraries. For example, you may answer renewal requests directly on this screen.

The second column of buttons on the Lending Main Menu provides functions to update filled and returned requests and allows selection of utilities to assist you in the general upkeep of the Lending Request and Library databases.

- Update Lending Requests - presents a screen that allows you to update the status of a request in ILL's database such as Change In Process to Yes, Loan.

- Search Lending Requests - gives you access to all information contained in the local database relevant to a particular request or set of requests using a wide variety of search criteria.

- Search Library Database - gives you access to all information relevant to a particular library using a wide variety of search criteria. The Library database contains information about the address of the library, billing method, customary charges and group data.

- Input ALA Form - presents a screen that allows you to enter information for a request received by fax, phone, or mail.

- Get Text Email - tells ILL to check the email account specified in the Preferences/Email Setup menu and look for new Lending Request emails sent to you from a Web page of your own or by other ILL libraries. ILL will read in the information contained in these emails and put the requests into the same queue as requests received via OCLC or Docline.

The third column of buttons on the Lending Main Menu allows selection of support functions.

- Review New Libraries - allows you to review and update information about any newly created libraries that have been encountered when new requests were read/created by ILL.

- Billing - presents a screen that allows review and update deposit accounts and IFM records. You can also manage invoices/account statements (depending on your Billing Preferences settings).

- Overdue Notices - produces first and second overdue notices per library.

- Statistics - allows you to select a report type, time period, and libraries or groups of libraries to be used to compute the statistics for each report. This is discussed in Chapter 5.

10.2. Getting New Requests

This section describes lending requests relative to OCLC, Docline, ALA, ISO, email from a Web form, and creation of a new library record.

10.2.1. OCLC

Clicking the OCLC button on the Lending Main Menu brings up the OCLC Lending screen shown in Figure 10.2, "Lending Input Files dialog box - Lending menu" (page 10–3). The top portion of the screen is used to control downloading messages from OCLC. There are check boxes available to allow you to select which message categories you wish to receive and a button to allow you set which categories are set by default. Select or de-select the message categories that you want and click the Read New Lending Messages from OCLC link. The Status box will show you what is happening as the messages are downloaded.

Figure 10.2. Lending Input Files dialog box - Lending menu

ILL also checks to see if there is a Library record for the other libraries involved in your requests. If there is not, a new library record is created. After the updates are received ILL will ask you if you want to review these new Library records. This will allow you to check the address fields for completeness. You can do this now or later using the Review New Libraries button.

10.2.2. Docline

From the Lending Main Menu screen, click the Docline button. The ILL Docline Lending Requests menu displays. See Figure 10.3, "Docline Lending Requests" (page 10–4).
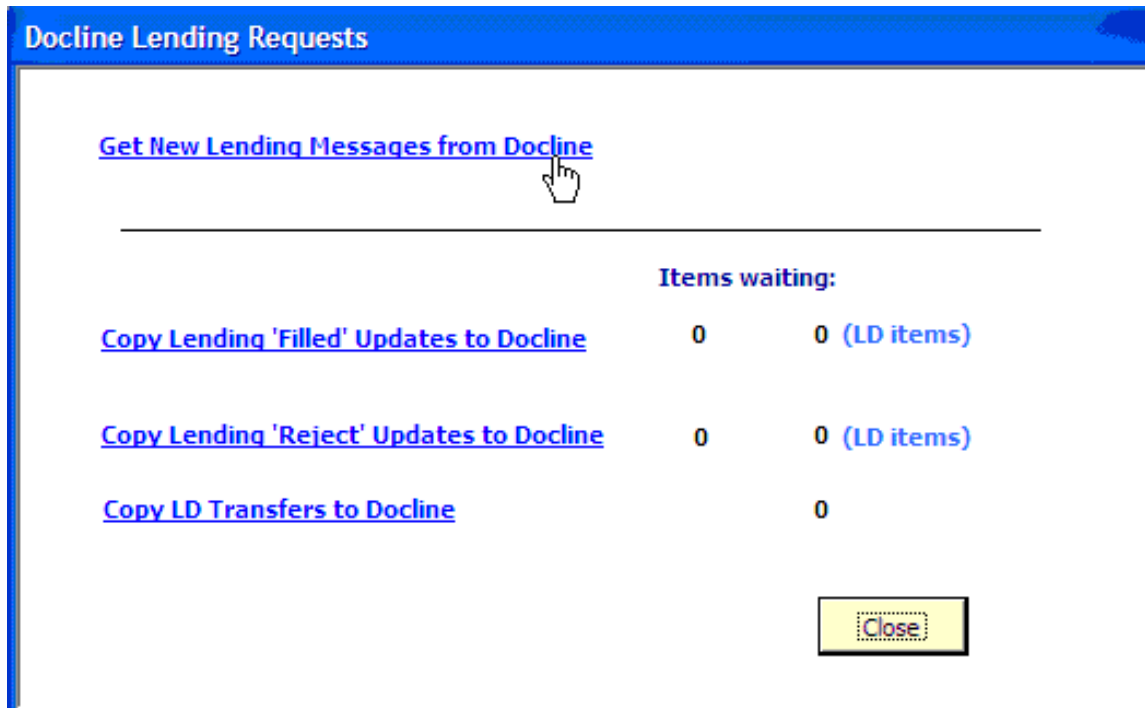
Figure 10.3. Docline Lending Requests

Click the Get New Lending Messages from Docline hyperlink at the top of the window. ILL logs you in to Docline and you see the screen as shown in Figure 10.4, "Docline Application Screen" (page 10–5).
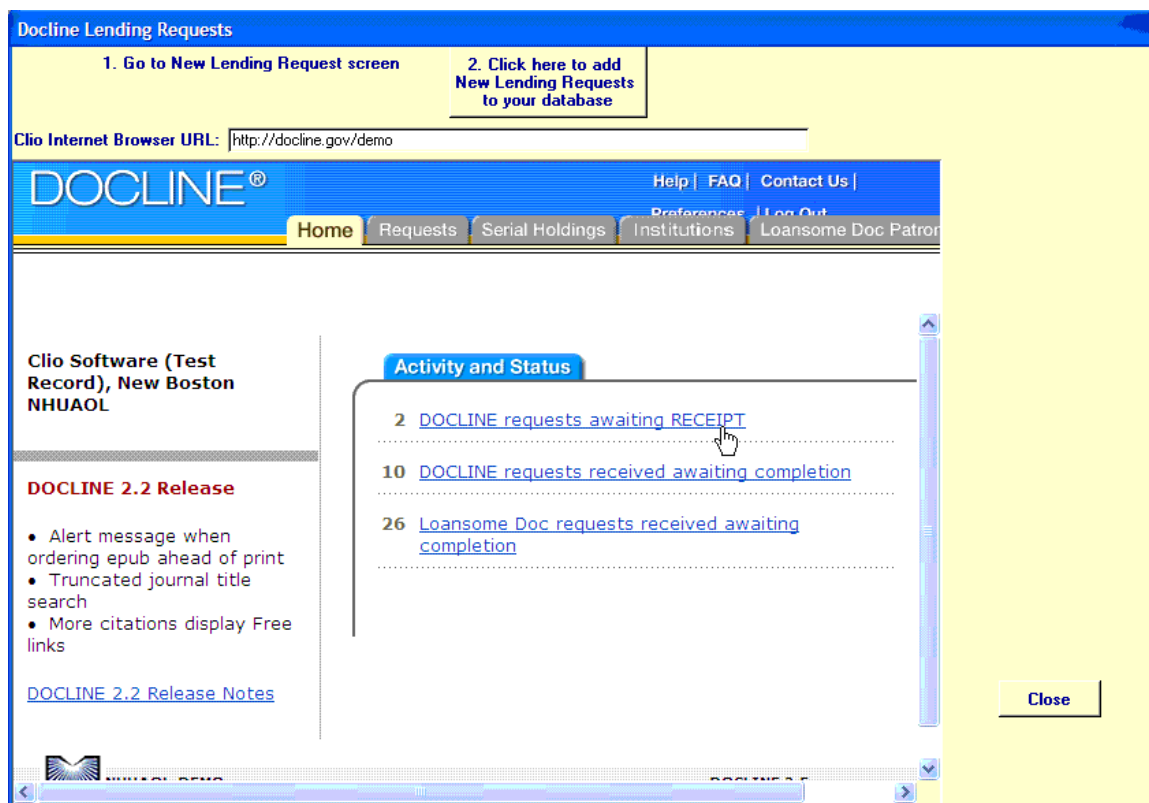
Figure 10.4. Docline Application Screen

All you have to do is get to the point where Docline displays to you all the data about new lending requests and click on the big "Click here" button at the top of the screen in Figure 10.5, "Docline Processing" (page 10–6). ILL will parse all the data being displayed to you and add it all to your ILL database. All new requests go into the same queue that OCLC and other types of new lending requests go into.

Figure 10.5. Docline Processing

Follow the exact same procedures for Loansome Doc requests.

Requests gathered from Docline in this manner are now in your ILL Lending database along with all other requests you have received from other sources, such as OCLC.

10.2.3. ALA Form

New ALA requests are simply typed in as they arrive using the Input ALA Form button on the Lending Main Menu. These requests then go into the same processing queue as requests received via OCLC, Docline, or email.

10.2.4. Email from a Web Form

You can now use an email account to receive emails from a Web page that you create for borrowing libraries to use, or for borrowers to send email request to directly using ILL. Just as ILL Request reads in Borrowing Request emails, now ILL reads in Lending Request emails. The new Get Text Email button on the Lending Main Menu allows you to read in these request emails. See the Appendix for information regarding setup of this function.

10.2.5. Creation of a New Library Record

ILL checks to see if there is a Library record for the borrowing library in your incoming lending requests. If there is not, a new library record is created. ILL will ask you if you want to review these new Library records. This will allow you to check the address fields for completeness. You can do this now or later using the Review New Libraries button.

10.3. Reviewing New Requests

On the Lending Main Menu screen, click the Review New Requests button. The New Lending Requests

screen (see Figure 10.6, "New Lending Requests" (page 10–7)) presents a summary of all new lending requests that are waiting for review, no matter how they were received (OCLC, Docline, faxed ALA form, etc.). This means you have a single place to go and a single workflow for sorting through all lending requests. The number of book requests and the number of journal requests are shown.
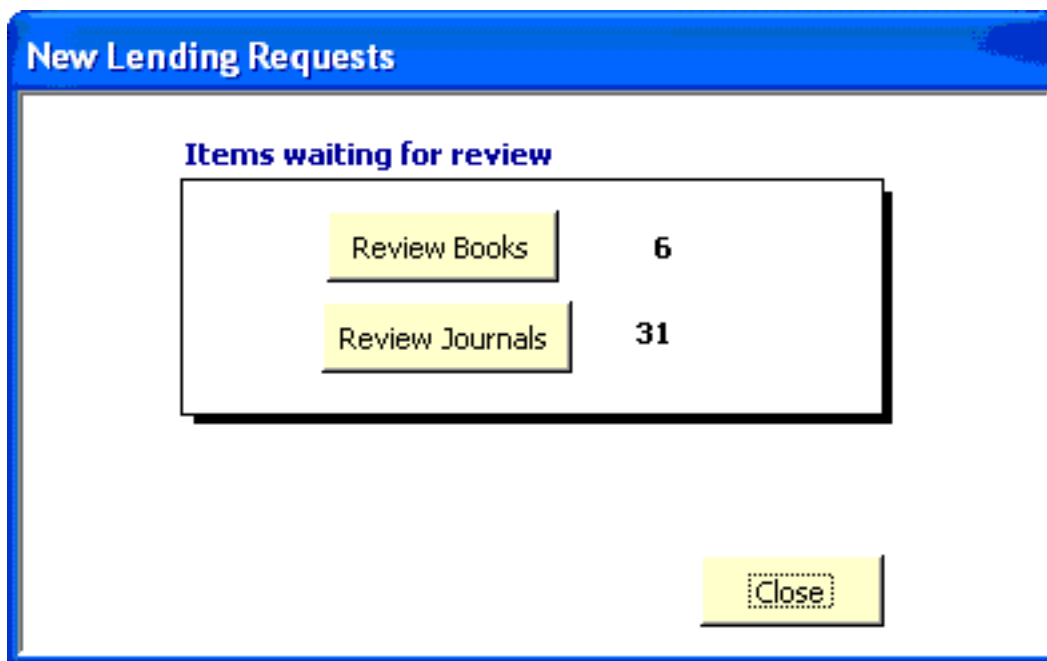

Figure 10.6. New Lending Requests

When you click on New Lending Requests for Books (and similarly New Journal Requests), a summary screen opens that displays a one-line entry for each item as shown in Figure 10.7, "New Journal Requests Example" (page 10–7).
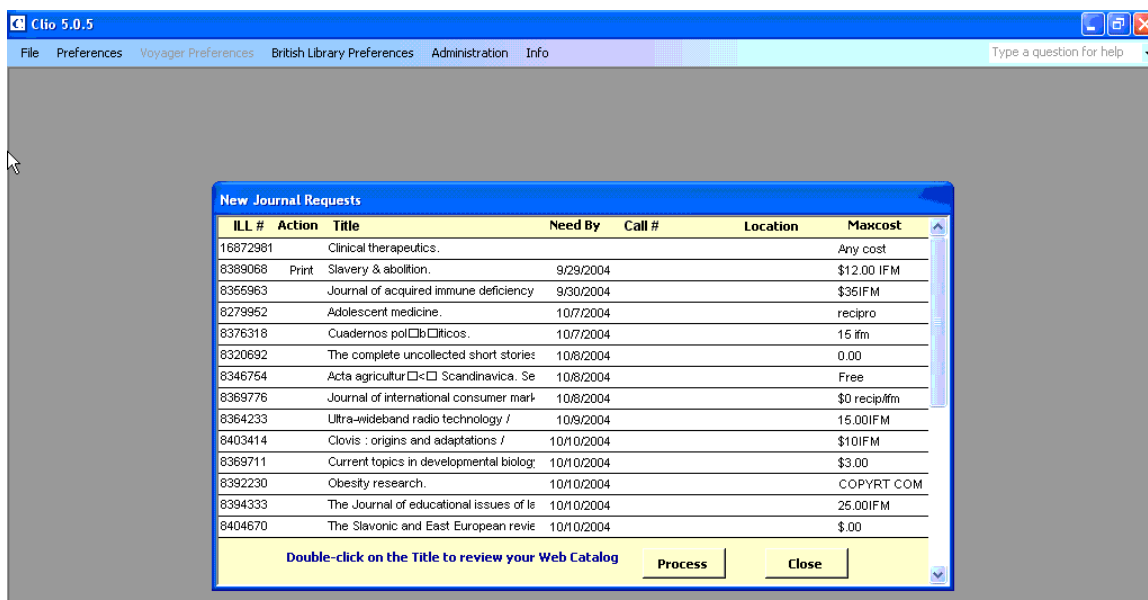

Figure 10.7. New Journal Requests Example

If you double click any one of those lines, you proceed to the Check Local Holdings screen. See Figure 10.8, "Check Local Holdings" (page 10–8).
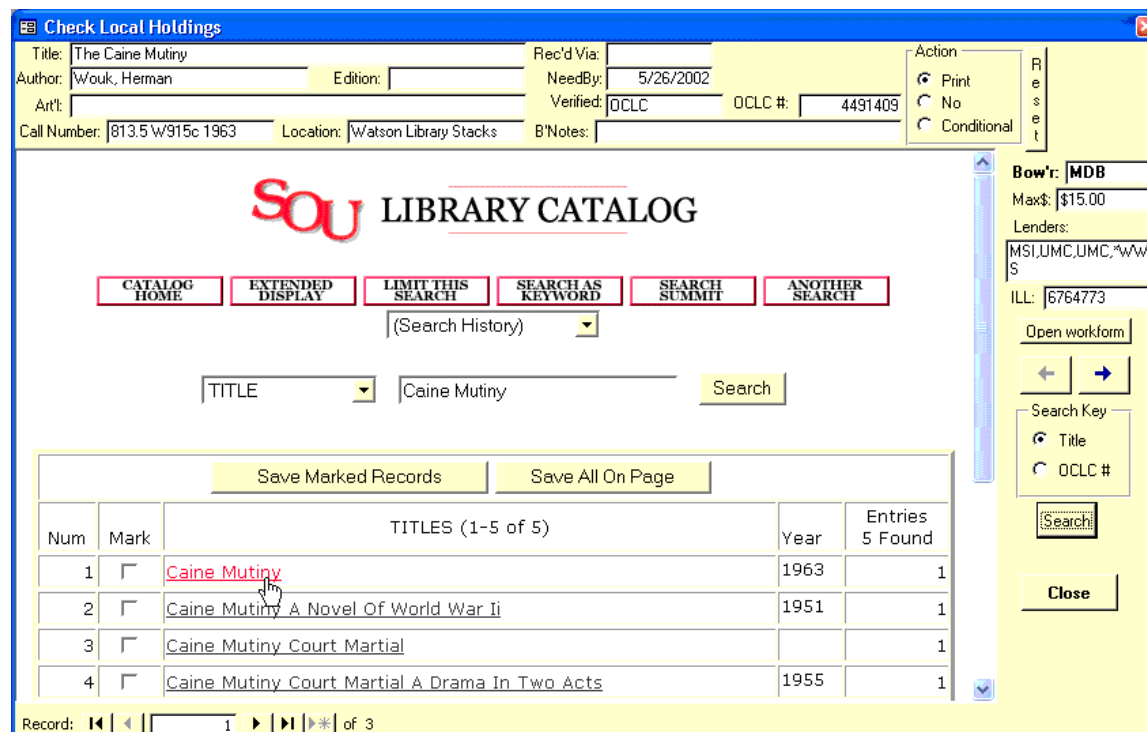

Figure 10.8. Check Local Holdings

At the top of the window basic bibliographic data is displayed for the item you double-clicked. An embedded web browser that is targeted to your own OPAC's search screen occupies most of the window. It works like any other browser you use (Firefox, Internet Explorer, etc.) except it is inside ILL and can be controlled by ILL. You may choose to search your web catalogue by Title or OCLC # (right side of the window) and initiate the search by clicking the Search button. You set up the search parameters for your OPAC using the Preferences/OPAC Setup or Preferences/Add New OPAC menus. Check with technical support if you need assistance with your OPAC.

Results of the search of your OPAC are displayed in the browser portion of the window. If you have the item, you may copy (ctrl C) and paste (ctrl V) the call number and the location into the fields provided in the description area at the top of the window. For items that you will probably be able to fill, copy that information and select Print in the Action menu at the top of the screen. A pick slip will then be printed for the item, which will contain both call number and location information.

If you do not have the item, you may choose No and the appropriate reason (Docline Reasons for No are shown for Docline requests). The OCLC list of Reasons for No has been updated with the 6.0 version of ILL to OCLC's new-in-2008 list of reasons. You may also select Conditional and supply the condition. The OCLC No and Conditional responses will be readied for the transmission to OCLC.

The left and right arrow buttons at the right of the screen allow you to scroll through all of your new requests. When you have finished with this window for the present, click Close to return to the New Book (or Journal) Requests screen. You will notice that the action column contains the action you selected for each item. When you hit the Process button, pick slips for the selected items with call number and location will be printed, and No and Conditional responses will be readied for transmission to OCLC, Docline or to other libraries via ISO communication.

Pull slips contain the borrowing library's phone and fax numbers in the borrowing notes and the copyright compliance (CCG or CCL) is printed on the pull slip.

After the item has been pulled from the shelf, or found to be actually unavailable, the record is updated in ILL using the Update Lending Requests screen as usual (see the Updating Requests section). For Docline requests you will only see YesCopy, YesLoan and No as choices. For Loansome Doc requests there is an additional choice of Transfer.

The point of all this is that you can automatically check your local catalog's holdings information to see if each requested item is possibly available and select your response to the request immediately. For items that you may choose to fill, you can grab the item's call number and holdings information and print a pick slip all in one step. It's hard to overstate the savings in time that this screen has produced in lending operations where it has been implemented. No more switching between programs to check your local catalog, no more printing out of every new request and then searching somewhere else for call number and holdings info. No more sending somebody to look for an item that is checked out.

10.4. Updating Requests

Clicking the Update Lending Requests button on the Lending Main Menu brings you to a screen in which you can also perform lending status updates. See Figure 10.9, "Update Lending Requests" (page 10–9).

Figure 10.9. Update Lending Requests

The procedure is simple and works just like it does on the borrowing side. Set the status selector on the left to the status that you want. Enter in the ILL number of a request and hit Enter on your keyboard. Depend-

ing on the status selected, various relevant fields will appear on the screen. Hit Enter again to make the update to that record, and the screen is reset for your next update.

Constant Data Records:

If you are updating an item to YesCopy or YesLoan, you will need to select the Constant Data record that is appropriate for the particular transaction. This is a convention that was preserved from the days of Microenhancer when certain data that usually remained consistent for all lending requests was sent to OCLC in a separate packet called a Constant Data Record. Clicking on the Edit CD Record button on the Lending Updates screen brings up a window where you may edit or add a new set of constant data. See Figure 10.10, "Edit Constant Data" (page 10–10).

Figure 10.10. Edit Constant Data

You might consider Constant Data Records as little packages of preferences that you can use for lending requests. They are an all-in-one set of data, meaning that you can't edit any of the particular bits of data contained in a CDR individually. If you want to change the Lending Notes for a particular request, you will have to create a new CDR for that note or edit an existing one. So you might create different CDRs for different sorts of requests ahead of time: one for media requests, one for no-charge requests, and one for requests where you charge $25, for example.

10.5. Sending Updates

This section describes sending updates with OCLC, Docline, and ISO.

10.5.1. OCLC

Clicking the OCLC button on the Lending Main Menu brings up the OCLC Lending screen, shown earlier. The top portion of the screen is used to control downloading messages from OCLC.

The lower right portion of the OCLC Lending screen shows you the number and type of updates ready to be sent to OCLC. When you are ready to send them, click the Send Lending Updates to OCLC link and they will be sent. A progress dialog will appear in the Status box.

10.5.2. Docline

Once records are updated in ILL, it's time to send the updates to Docline. Click the Docline button on ILL's Lending Main Menu and you will see the screen shown in Figure 10.11, "Docline Lending Requests - Sending Updates" (page 10–11).
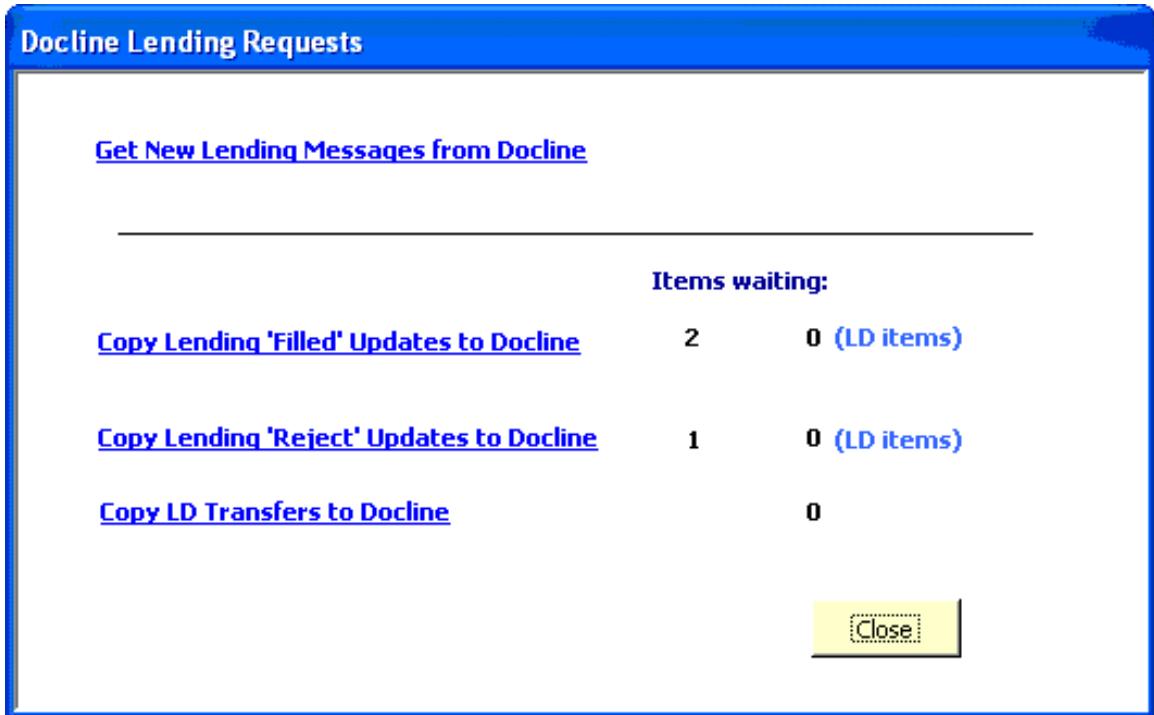

Figure 10.11. Docline Lending Requests - Sending Updates

The number of not-yet-sent-to-Docline updates is shown on this screen.

Filled items:

Click on the Copy Lending Filled Updates to Docline link. You will be logged on to Docline and see a screen that includes one or two links saying xx Docline (or Loansome Doc) requests awaiting completion as shown in Figure 10.12, "Docline Lending Requests - Awaiting Completion" (page 10–12).
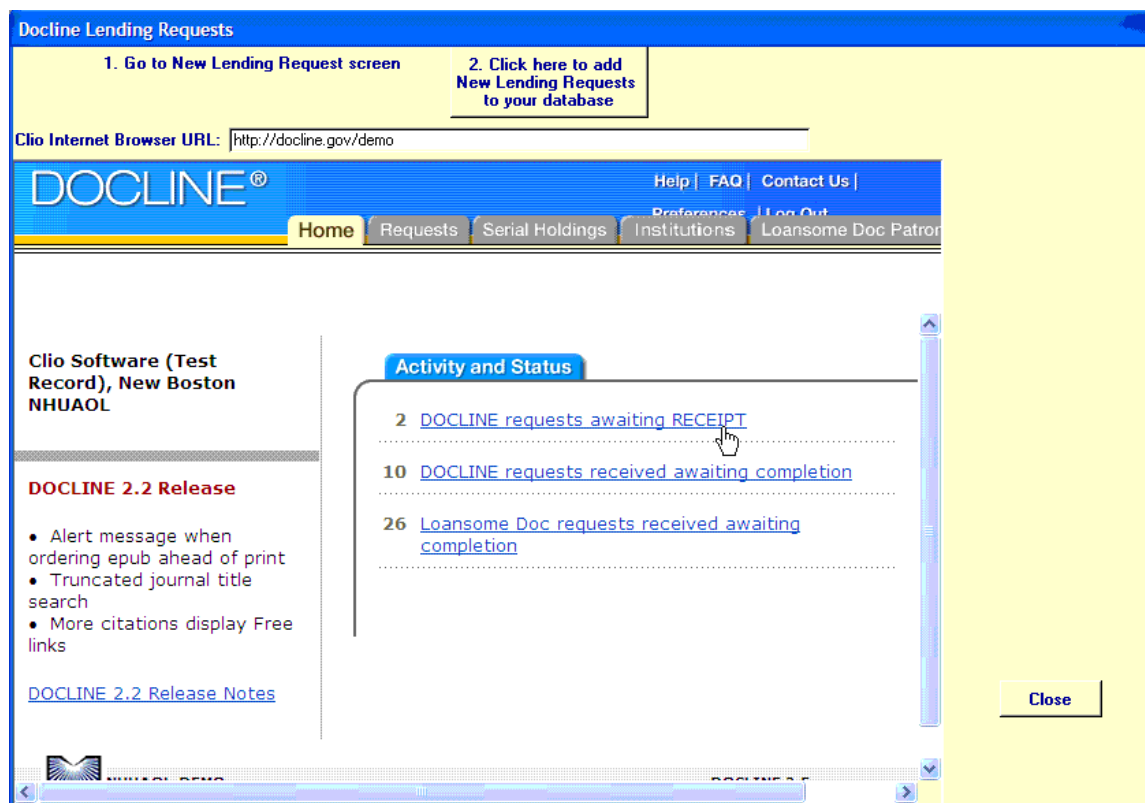
Figure 10.12. Docline Lending Requests - Awaiting Completion

Click on the Docline requests received awaiting completion link and you will see a screen like the one in Figure 10.13, "Docline Lending Requests - Awaiting Completion In Process" (page 10–13), but without any data entered yet:

Figure 10.13. Docline Lending Requests - Awaiting Completion In Process

The idea here is very similar to the Docline Direct way of producing new requests with ILL Request, but in reverse this time: ILL will supply the data from its database for you to paste in to the box in Docline. Click on the Get Docline Fills button, and ILL will supply a list of the appropriate request numbers in the box at the right. Highlight the list, hit Ctrl and C on your keyboard to copy the data, move over to the text box in the Docline window and hit Ctrl and V on your keyboard to paste the list of numbers into the box. Those steps have been completed in the screen shown above. Click the Docline window's Update button to enter your updates into the Docline system.

You will then be taken back to a screen in Docline where you can select the link for updating Loansome Doc requests. Loansome Doc updates are entered in exactly the same manner and should be done at the same time as regular Docline update.

Once you are done with both regular and Loansome Doc request filled updates, click on the Close button in the ILL window to close this screen and go back to ILL's Docline communications screen. On the way there, ILL will ask you to confirm that you updated the current list of filled items to that status in Docline, as shown in Figure 10.14, "Docline Lending Requests - Confirm Successful Update" (page 10–14).
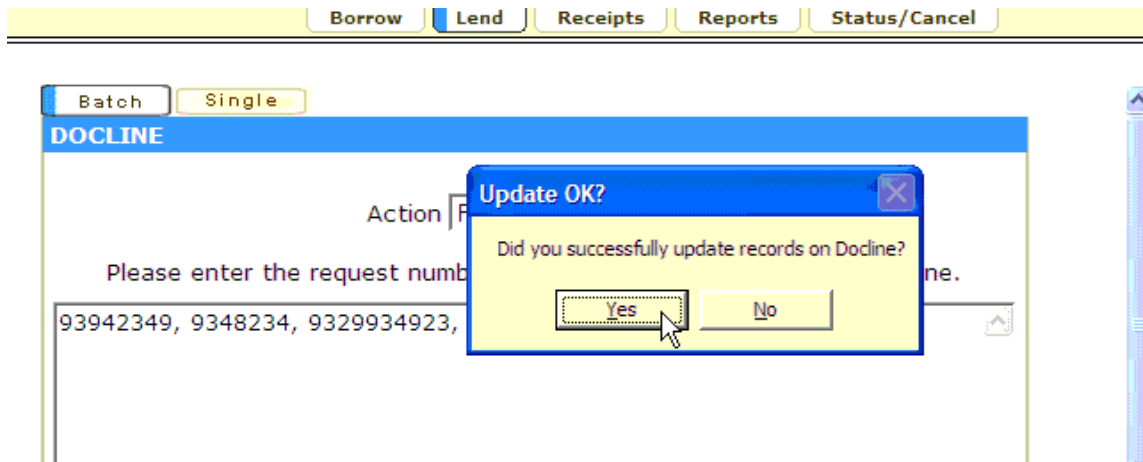
Figure 10.14. Docline Lending Requests - Confirm Successful Update

Click Yes if everything went well and you did in fact update those items to filled in Docline. You will now be back at ILL's Docline communications screen.

Rejected items:

From the Docline communications screen in ILL, click on the Copy Lending Reject Updates to Docline link. You will be logged on to Docline once again. As before, navigate to the requests awaiting completion area.
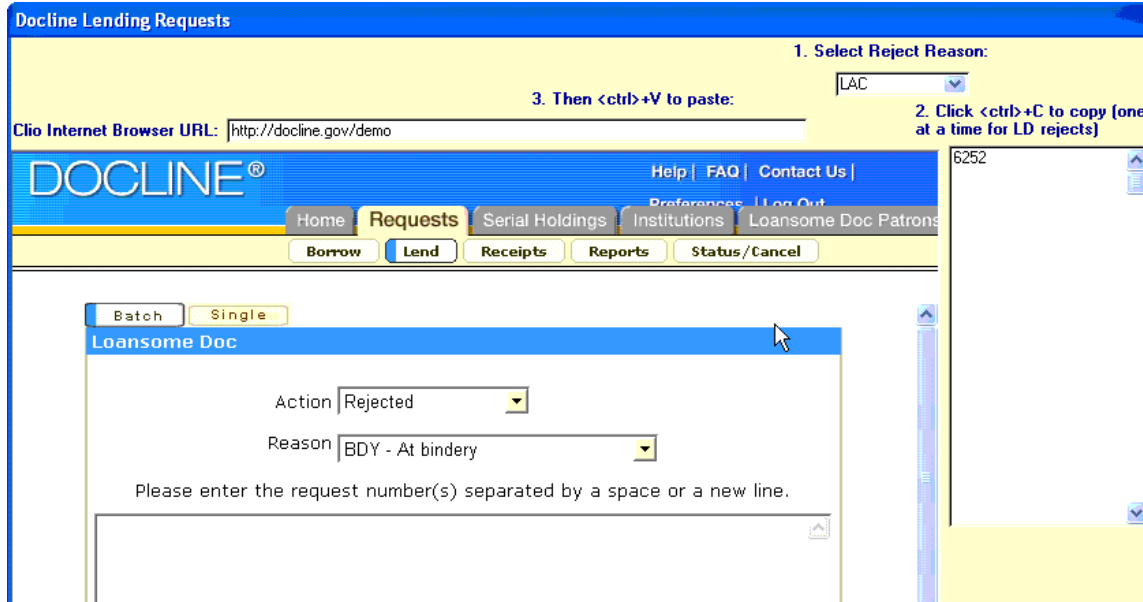

Figure 10.15. Docline Lending Requests - Awaiting Completion (Rejects)

This time, select Rejected from the Action menu, as shown above. Then take a look at box number 1 at the top of the ILL window, as shown above. All of the reasons that you currently have entered for reject responses will be shown here in this drop down box. Select the first reason, and the request numbers for all those requests with that reason-for-no will appear in the box at the right. Copy and paste it into the box in

the Docline window, select the matching reason from the Docline drop-down box just above the test box, and click the Update button in the Docline window. Once those updates are entered, move on to the next reason-for-no category in the ILL box number 1 and copy those request numbers into the Docline window and make those updates.

If you've read the Docline-related sections above, what's going on here should be self-evident by now: ILL supplies the list of request numbers for you to enter into Docline's update forms. As usual, regular and Loansome Doc items are updated separately.

10.5.3. ISO

ISO messaging is not enabled in ILL or ILL Request at the time of this writing (May, 2005). We will be releasing our ISO communications module to customers that want it in the near future, and at that time we will include an addendum to this manual explaining how to use ISO communications in full.

10.6. Sending Bills and Collecting Money

ILL provides a great set of options and tools for creating and managing the bills you send to your borrowing libraries. ILL also provides tools for managing your IFM charges and Deposit Accounts. If you do not charge for loans or copies you can skip this section.

The options are all set through the Preferences/Billing menu item.

Figure 10.16. Lending Billing Preferences

The most fundamental option to decide upon is the type of bill that you want to use. ILL provides for two. You can select one or the other, but not both:

- An Invoice (by far the most common) which is simply a record of the item(s) filled and the charges.

- An Account Statement, which is a record of all item(s) filled and the payments received since the last statement. It also provides a beginning balance, totals of all charges and payments received and an ending balance. This type of bill, not unlike your own credit card statement, would typically be sent on a periodic basis.

If you select Invoice as the type of bill you want to use, then you can also choose how you want the Invoices created:

- ILL can create them automatically as items are updated, one Invoice per item, or

- You can ask ILL to create the Invoice when you want them such as once a day or once a month, and ILL will create one Invoice per Borrowing Library.

There are also several options available for formatting the Invoices or Account Statements. For example, if you ask ILL not to print your address at the top of the Invoice, you may be able to use your own letterhead paper to print your Invoices.

The Lending Billing screen provides the tools for managing your Invoices or Account Statements:

- You can create Invoices (or Account Statements) for items not yet Invoiced and print those that have not yet been printed.

- You can review and re-print Invoices (or Account Statements) using a search and select capability just like for Lending Requests.

- You can record payments received, the date they were received and the check number.

- You can review and verify all of your IFM transactions against your monthly report from OCLC.

You can review any Deposit Accounts and add additional cash deposits.

10.7. Overdue Notices for Other Libraries

Clicking the Preferences button on the Lending Main Menu presents the Print Overdue Notices screen.

Using this screen you may print First and Second Overdue Notices that can be mailed or faxed to the borrowing institution. You select the number of days overdue for the first notice or the number of days since the first notice was sent before the second notice is printed. The defaults for these time periods are set in the Notices-Archive section of the Preferences menu.

10.8. Overdue Notices with Voyager

ILL Management can create and print overdue notices which can be mailed or faxed to the borrowing institution.

Because of the integration between Voyager and ILL Management, notices and reports are most likely created and printed from the Voyager Reporter module. Charging the item to the borrowing institution in the Voyager Circulation module allows you to track an ILL item once it has been shipped and, as a result, generate any type of notice necessary. Voyager automatically creates an overdue notice based on the due date of the item and the circulation policies that have been set of interlibrary loan items.

Chapter 11. ILL Reports Application

11.1. Overview

ILL Reports is another application that resides on the client PC in addition to ILL Request and ILL Management. Like ILL Request and ILL Management, there is an icon/shortcut on the PC desktop for opening the application. This application provides a front-end, user interface to Microsoft Access for generating reports.

The application opens with a dialog box that allows you to:

- Select a report from a default list of reports

- Specify a time period for the report:

  - Current month

  - Previous month

  - Year-to-date

  - Previous year

  - Custom

- Preview the report

Figure 11.1. ILL Reports Main Dialog Box

Reports are created from a data source (table or query) and a layout design.

11.2. Tables

ILL Reports connects with the MS Access database through linked tables. These are tables stored in the central database that are linked to each desktop application. Each desktop application links to the tables that it needs. ILL Reports needs the following tables:

- BorrowingRequests

- BorrowingRequestsArchive

- LendingRequests

- LendingRequestsArchive

- Libraries

There is one internal, non-linked, table called MyReports. This table is populated automatically with the names of all reports in the application.

All reports are based on Union queries which combine the unarchived and archived tables into one data source. This enables the flexibility of generating reports that pull from current and archived information.

Union queries filter tables based on the time period selected by the user. The results of queries can be used as the data source for subsequently queries needed to generate reports. For example, the Patron Status Report uses the BorPatronStatusqry that is based on the BorrowingRequestsUnion query.

In general, fields within tables are self-description. The following tables highlight the exceptions.

Table 11.1. BorrowingRequests Table Field Exceptions

Field	Description
StatusInternal	Reflects what ILL Management views as the true status of the request such as pending, recCopy, recLoan, returned, cancelled, or unfilled.
StatusOCLC	Reflects status issues with regards to or from the external supplier. If the supplier asks a question about a request, for example, this would be identified with a status of Conditional. (Note: The StatusOCLC name indicates the historical origin of the program.)
StatisticsDate	The date that the request was either filled, canceled, or went unfilled.
PatronID	Not used with Voyager ILL
Patron1	Patron ID
Patron2	Patron department
Patron3	Patron status
Patron4	Patron address
Patron5	Patron phone number
Patron6	Patron e-mail
Patron7	Patron fax
Patron8	Patron notes and pickup location

Table 11.2. LendingRequests Table Field Exceptions

Field	Description
StatusInternal	Reflects what ILL Management views as the true status of the request such as pending, recCopy, recLoan, returned, cancelled, or unfilled.
StatusReported	Reflects status issues with regards to or from the external supplier. If the supplier asks a question about a request, for example, this would be identified with a status of Conditional. (Note: The StatusOCLC name indicates the historical origin of the program.)
StatisticsDate	The date that the request was either filled, canceled, or went unfilled.

Chapter 12. Voyager ILL Workflow

12.1. Sample Workflow

One of the best features of the ILL module is its flexibility. Any institution, regardless of its size, number of ILL staff, and, more importantly, the number of interlibrary loan requests they may send or receive in a given day, week, month, year, can configure the ILL module to best fit their situation.

There are a number of things to take into consideration before configuring the ILL module.

1. Who is responsible for processing interlibrary loan requests?

    *   ILL staff

    *   Circulation staff

    *   Cataloging staff

2. Who of the above staff is responsible for which parts of the interlibrary loan process?

    *   creating requests

    *   reviewing requests

    *   sending requests

    *   updating requests

    *   a creating brief bib/holdings/item recordscirculating the requested item

    *   In the interlibrary loan process, there is the potential to use three Voyager clients and two ILL clients:

    *   Will the ILL staff be responsible for using all the clients or will interlibrary loan items be passed off to Cataloging or Circulation staff at some point in the process?

    *   If you have students helping with interlibrary loan, will they be using both ILL clients?

    It is possible to split ILL duties by ILL client: students can have access to ILL Request and be responsible for retrieving, reviewing, and sending the requests while professional ILL staff can have access to ILL Management and be responsible for downloading updates from OCLC, updating the requests in ILL Management, and sending updates back to OCLC.

3. What routing option will be used most often?

    *   Direct-to-Profile (OCLC)

    *   Direct-to-Lender (OCLC)

    *   Direct-to-Review (OCLC)

    *   ALA form e-mailed/mailed/faxed to lender

    *   Doc Supplier

    *   British Library (BL)

  • Libraries Australia Document Delivery (LADD)

In ILL Request, you can set a routing default in Preferences, but you can only set one. So think about the routing option you will use most often. You can always change the routing option when you review requests in ILL Request. If you use Direct-to-Profile most often, and only use Direct-to-Lender or e-mail an ALA form a few times a week, it's easy to change the routing for those few requests.

4. How much time do you want to spend "handling" each interlibrary loan request?

  • very little

  • a moderate amount

  • a large amount

Direct-to-Profile is a powerful option. You determine your profiles with OCLC and they do the rest. Interlibrary loan workflow can be reduced to the minimum. Creating ALA forms to be faxed or e-mailed take more time in the creation step, but may save time in the long run if you have established special ILL agreements with nearby institutions.

Finally, take a look at the sample workflow described below, think about the hints described above, and think about your current workflow. All three can help you successfully implement the Voyager ILL Module.

12.1.1. Borrowing Workflow

This sections includes ILL borrowing workflow configuration and planning information.

12.1.1.1. Address Information

Before you begin sending and receiving interlibrary loan requests, make sure all the options and preferences in ILL Request and ILL Management that require address information are complete. You want to make sure that a lending institution sends the requested item to the correct address or, maybe more importantly, that a borrowing institution returns your library's book back to the correct address. Also, when you send ALA form requests and e-mail requests, you are sending the request directly to the lender and not to OCLC, so you want to make sure the other institution can contact you.

Check the locations in Table 12.1, "Address Configuration Locations" (page 12–2) for complete address information.

Table 12.1. Address Configuration Locations

Information	Location
ILL Request	Options>Setup Email Server Information
ILL Request	Options>Setup My Addresses
ILL Management	Preferences>Addresses
ILL Management	Preferences>ALA Form Preferences
ILL Management	Preferences>Email Setup

12.1.1.2. Workflow for ILL Requests Sent to OCLC

The OCLC Interlibrary Loan service offers a program called ILL Direct Request. ILL Direct Request can accept and process your patron's WebVoyáge-created interlibrary loan requests based on special instructions determined by you. ILL Direct Request funnels those requests directly through the system, bypassing

the borrowing staff. There are three processing options that can be used with ILL Direct Request:

- Direct-to-Profile requires you to define borrowing criteria using profiles which determine the types of requests that are eligible for automatic forwarding and which need staff review.

- Direct-to Lender allows you to choose lender(s) for a request and OCLC forwards the request to the first potential lender.

- Direct-to-Review sends the ILL request into you review file at OCLC for staff review.

- For more information about ILL Direct Request, see the websites listed in Section 2.2, "Prerequisite Skills and Knowledge" (page 2–1).

Regardless of the option you choose, the workflow begins with a patron-initiated request.

Rebecca Q. Student is a graduate student at Example University. She needs a book on creating XML documents. She goes to the Lloyd Memorial Library and performs a simultaneous search of multiple bibliographic and citation databases. Rebecca finds a book she would like to order through interlibrary loan. She clicks the Request button in WebVoyáge (Figure 12.1, "Request Button" (page 12–3)). and types in her barcode number and last name.

Figure 12.1. Request Button

Rebecca chooses an ILL request form from the drop-down list in WebVoyáge. The request form displays (see Figure 12.2, "ILL Loan Request Form in WebVoyáge" (page 12–4)).

Figure 12.2. ILL Loan Request Form in WebVoyáge

Rebecca fills in the required information and clicks the Submit Request button. At that point, the request is sent to the dedicated e-mail account established for the ILL module.

In order to process the request, you must open ILL Request and click the Get New Borrowing Requests button. ILL Request reads all current e-mails in the dedicated e-mail account into ILL Request. Remember, the requests are not yet in the ILL database at this point.

After the requests are read into ILL Request, click the View Borrowing Request Summary button to see a list of the requests. If you selected one of the OCLC options in Options>Setup Supplier Service Information, all the requests defaults to that routing option. You can double-click a request to see the details and to change the routing option, if necessary.

All of the fields in Options>Setup Supplier Service Information must be completed before you can send requests to OCLC.

When the requests are ready to send, make sure the Ready box is checked for each request and click the Send Requests button. Your requests have now been sent to OCLC.

However, they have not been saved to the ILL database. OCLC requests must be downloaded from OCLC before they are saved to the database. Also, the request information does not display in the "Requests Pending" section of Rebecca's patron information page in WebVoyáge until they are saved to the database.

If you are using the Direct-to-Profile option, the request must include an OCLC number or an ISBN number, title information, and patron ID. The request is sent to OCLC where the OCLC system will:

• match the request to a bibliographic record

• match the request, including bibliographic and patron data, to your profiles

- after matching to a profile, build a lender string

- applies a specified constant data record, uses the bib data from the WorldCat record, generates a lender string, and send the request to the first potential lender

If you are using the Direct-to-Lender option, you must review each request and select a lender string yourself in ILL Request before sending to OCLC for processing. The Locations (lender symbols), Verified, and Patron ID fields must be completed. If any of the request information is missing or incorrect, the request is placed in your review file.

If you are using the Direct-to-Review option, the request goes directly into your review file when you send it to OCLC. You can then review, verify, and process all requests. Direct-to-Review requests must have the title and patron ID fields completed.

Once the request is sent to OCLC, the interlibrary loan process continues as usual. Any other changes, updates, or the like, that need to be made to the request must be done in ILL Management.

If OCLC receives any updates to the request from the lending institution, they update the request record in their system.

Open ILL Management, click Go to Borrowing, and click OCLC. From the OCLC dialog box, you can Read New Borrowing Messages from OCLC, identify the categories to download, and Send the Borrowing Updates to OCLC. ILL Management reads and enters into the ILL database only those messages related to borrowing statuses: Recalled, RenewedOK, NoRenewed, Unfilled, WillSupply, OnlineProduced, and DirectProduced. All new borrowing requests are saved to the database and existing borrowing requests are updated.

You can Search Borrowing Requests to retrieve a list of all requests updated to an OCLC status of "Shipped" or updated on a certain date. If you want, you can create brief bib/holdings/item records at this point in the process. If you are creating these records "on-the-fly" in Circulation, make sure the OPAC Suppress for Items On The Fly check box is checked off for the ILL happening location in System Administration > Circulation > Circ Policy Definitions. This will prevent the item from being visible in your local catalog. You do not have to create the records at this time, it's up to you.

Once you have the requested item in hand, you must update the status of the item in ILL Management. Click the Update Borrowing Requests button. Enter the ILL ID number of the request and update the status to "Received Copy" or "Received Loan."

Now you need to let OCLC know that you received the item so they can inform the lending institution.

Be aware of when you are downloading updates from OCLC and uploading updates to OCLC. You could possibly overwrite the status of some requests if you download updates from OCLC before uploading your new updates. One way to avoid this problem would be to send (upload) all updates to OCLC at the end of the day and download updates from OCLC each morning.

If the request is for photocopies, then the item request information displays in the "Requests Pending" section of WebVoyáge as "Received."

12.1.1.3. Workflow for ILL Requests Sent Directly to Lender

You may have established borrowing and lending agreements with local or nearby institutions or you might want to request an item from an institution whose holdings are not in OCLC's WorldCat.

In either case, you can bypass OCLC and send the request directly to the lending institution. When you create new request forms in System Administration, you can select databases through which the request can be accessed (see Section 4.6.1, "Request Forms" (page 4–19)). If your library had a borrowing agreement with Example University, you could create an ILL request form and select Example University's database from the list on the Databases tab.

When one of your patrons performs a search in Example University's database, finds a record, and clicks the Request button, then that specific request form appears in the drop-down list.

There are a few "either/or" situations to consider in regard to using ALA forms for interlibrary loan. For example:

- you can EITHER create special request forms for use with WebVoyáge OR you can create the requests manually in ILL Request OR in ILL Management.

- in ILL Request, when you click the View Borrowing Request Summary button and look at the request details, you can choose EITHER ALA form OR E-mail as the routing option.

- in ILL Management, you can EITHER click the Prepare ALA Form button and create the request OR the Prepare Email Requests button and create the request.

The actual steps required to create and process an ALA form request or an e-mail request depends on your choices for the "either/or" situations described above. Table 12.2, "Form Creation Steps" (page 12–6) outlines the steps required to create each type of request.

Table 12.2. Form Creation Steps

ALA forms created in WebVoyáge	ALA forms manually created in ILL Request	ALA forms manually created in ILL Management	E-Mail forms manually created in ILL Management
Patron searches database, selects request form and submits the request.	ILL staff clicks Manual Entry button, fills out ALA forms, clicks Save Request.	ILL staff clicks Prepare ALA Form button, fills out form, clicks Save Request, prompted to print a request form, clicks Yes or No, the request is saved to the ILL database.	ILL staff clicks Prepare E-mail Request button, fills out form, clicks Save Request, the request is saved to the ILL database.
ILL staff opens ILL Request, clicks Get New Borrowing Request.	ILL staff clicks View Borrowing Request Summary, double-clicks a request to review. Selects ALA Form as routing option if not already selected, review request, clicks the Close button.	ILL staff mails or faxes the request to the lending institution.	ILL staff clicks the Review Email Requests button, double-clicks a request to review.
ILL staff clicks View Borrowing Request Summary, double-clicks a request to review. Select ALA Form as routing option if not already selected, review request, clicks the Close button.	ILL staff checks the Ready box, clicks the Accept/Print ALA Requests button. Request is saved to ILL database and form is printed. Or, ILL staff clicks the Accept ALA Requests button to save request to the database without printing a form.		ILL Staff reviews request, checks the Ready check box at the top of the form, clicks the Return to Borrowing Menu button, clicks the Send Requests button
ILL Staff checks the Ready box, clicks the Accept/Print ALA Requests button. Request is saved to ILL database and form is printed. Or, ILL staff clicks the Accept ALA Requests button to save			

ALA forms created in WebVoyáge	ALA forms manually created in ILL Request	ALA forms manually created in ILL Management	E-Mail forms manually created in ILL Management
request to the database without printing a form.			

Even though this is not an OCLC request, you can still use ILL Management to track ALA form requests. When you receive the requested item, you can update the status of the item in ILL Management to Received Copy or Received Loan and when the item is returned by the patron you can update the status to Returned. The ILL ID number for an ALA form requests begins with a dash symbol, for example -12884.

The rest of the process for ALA form requests is basically the same as for an OCLC request.

12.1.1.4. Workflow for ILL Requests Sent to a Document Supplier

The process of sending an ILL request to a document supplier is almost identical to sending a request to OCLC or directly to a lending institution. You can create specific request forms for patrons to use in WebVoyáge. Once submitted by the patron, they can be pulled into ILL Request, reviewed if necessary, and sent to the appropriate documents supplier. If you use one document supplier almost exclusively for interlibrary loan, you can set defaults for the supplier in Options>Setup Supplier Service Information in ILL Request. Then, every request that you retrieve includes the default information.

ILL requests sent to a document supplier must have the Routing and DocSuppliers fields completed on the request form. ILL requests sent to The British Library must also have the Search Level, Item Type, and Service Type fields completed. The Title and Patron ID fields must be completed for requests sent to any supplier.

When all the appropriate fields have been completed, ILL staff clicks the Send Requests button. ILL Request uses the e-mail address (plus the User ID and Password, if necessary) defined for the document supplier in Options>Setup DocSuppliers to forward the request.

12.1.1.5. Communication with The British Library

Most of the communication between you and The British Library (BL) is through e-mail. When the BL receives your request, they will send an e-mail confirmation of receipt within about 30 minutes. If there were no format errors in the request, the BL confirms that your e-mail message was accepted. The message confirms your postal address, the number of requests contained in your order, and the first and last request numbers allocated to your requests. If format errors were detected in your e-mail request, it is rejected and the BL sends a message informing you of the reason for rejection along with an error code.

After you send the request to BL, the rest of the process is the same as if you sent an ALA form request or e-mail request to another library in the U.S. You must manually update your requests in ILL Management. This is important because it relates to the request information available to the patron on the patron information page in WebVoyáge. The request is always Pending until you update the status of the request to Received, Cancelled or Unfilled.

12.1.2. Lending Workflow

All lending processes take place from the Lending Menu of ILL Management. The lending workflow is very similar to the borrowing workflows, it simply leaves out the patron-initiated request part.

Procedure 12.1. Workflow for ILL Requests Received from OCLC

To read the lending requests into the ILL module, the workflow is as follows.

1. Open ILL Management and click the Go To Lending button (Figure 12.3, "Lending Main Menu" (page 12–8)).
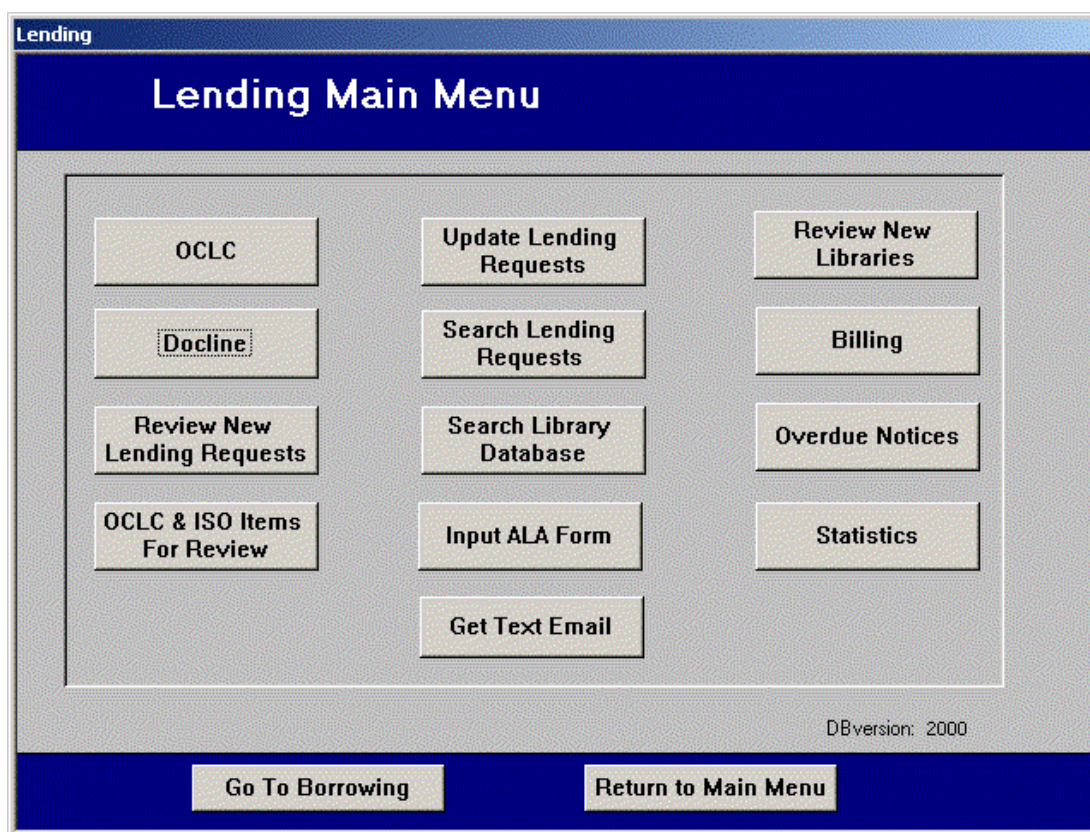
Figure 12.3. Lending Main Menu

2.   Click OCLC from the Lending menu.

3.   Select categories and read new borrowing messages.

4.   When ILL Management enters the updates into the ILL database, it looks for an existing records with the same ILL ID number and request date. If it finds a match, it updates the request. If it does not find a match, it creates a new record.

   ILL Management also looks for a library record that matches the Borrowing symbol in the lending request. If it does not find a match, a new library record is created. When all the updates have been added to the ILL database, ILL Management prompts you to review the new library records for completeness. You can check the new library records at that time or later by clicking the Review New Libraries button.

5.   Identify the item in your local database and retrieve the item. If you charge the item to the borrowing institution in the Voyager Circulation module, you can apply a due date, generate recall and overdue notices, and collect statistics for the institution and for the item. You must create a patron record for the institution if one does not already exist.

   You can update your lending requests in ILL Management, for example, update the status of a request from Pending to Yes Loan. You can also include any lending restrictions or charges. Click the Update Lending Requests button and update the request.

6.   When the item is returned to you, discharge it in Circulation and update the status to Completed in ILL Management.

Procedure 12.2. Workflow for ILL Requests Received Directly from Borrower

If you accept ALA forms, through e-mail, fax, or mail, for interlibrary loan requests, you must manually enter the request information into the ILL database.

1. Open ILL Management and click the Go to Lending button.

2. Click the Input ALA Form button. Enter all the information for the lending request. Click the Save This Request button to save the information to the ILL database. You must communicate any borrowing conditions or updates directly to the borrowing institution through e-mail, telephone, fax, and so on.

3. Identify the item in your local database and retrieve the item. If you charge the item to the borrowing institution in the Voyager Circulation module, you can apply a due date, generate recall and overdue notices, and collect statistics for the institution and for the item. You must create a patron record for the institution if one does not already exist.

    You can update still your lending requests in ILL Management, for example, update the status of a request from Pending to Yes Loan, in order to keep track of the request. You can also include any lending restrictions or charges.

4. Click the Update Lending Requests button and update the request.

    ### Result

    When the item is returned to you, discharge it in Circulation and update the status to Completed in ILL Management.

    At any time you can search for and review lending requests by clicking the Search Lending Requests button.

Chapter 13. Voyager ILL® Extended Service

13.1. Overview

The Voyager ILL Extended Service allows patrons to place ILL requests. After viewing a record, patrons can initiate an ILL request from the link resolver using OpenURL (such as SFX, for example). The request is sent to Voyager ILL Request in the form of a structured email. Subsequently, normal ILL Request workflow is performed.

This capability requires software to be installed by Ex Libris. Contact Ex Libris to schedule your installation if you do not already have the software installed.

13.2. Setup Considerations

Configuration of the Voyager ILL Extended Service consists of the following:

- Creating a local service in your OpenURL link resolver. See Section 13.2.1, "Creating Local Service in Your OpenURL Link Resolver" (page 13–1).

- Matching a message subject line in the `web.xml` file to the Voyager ILL Request Module. See Section 13.2.2, "Matching the Message Subject Line" (page 13–2).

- Adding the ILL Email Return Address to the `web.xml` file. See Section 13.2.3, "Adding the ILL Email Return Address to the web.xml File" (page 13–3).

- Enabling Voyager Patron Groups to place ILL Requests. See Section 13.2.5, "Enabling Voyager Patron Groups to Place ILL Requests" (page 13–5).

- Setting the persistent login timeout value. See Section 13.2.6, "Setting the Persistent Login Timeout Value" (page 13–6).

- Setting the ARTEmail flag. See Section 13.2.7, "Setting the ARTEmail Flag" (page 13–7).

- Configuring instructional and error message text (optional). See Section 13.2.8, "Configuring Instructional and Error Message Text" (page 13–8).

- Changing the order of last and first names in structured email (OCLC customers). See Section 13.2.9, "Changing Patron First and Last Name Order in the Structured Email (OCLC Customers)" (page 13–?).

Important

You must perform a stop/start sequence on Tomcat after changing the web.xml file. For more information, see Section 13.3, "Stopping, Starting, and Restarting Tomcat" (page 13–8).

13.2.1. Creating Local Service in Your OpenURL Link Resolver

You must create a local service in your OpenURL link solver to point to the WebVoyáge ILL service. This enables the service that allows patrons to perform an ILL Request using the ILL request form.

The link syntax to the ILL service must use the following format:

```
http://server:port/VoyagerILL/LFP/ILLRequest?atitle=%ATITLE%&aufirst=
%AUFIRST%&auinit=%AUINIT%&auinit1=%AUINIT1%&auinitm=%AUINITM%&aulast=
%AULAST%&au=%AUTHOR%&date=%DATE%&EISSN=%EISSN%&epage=%EPAGE%&issn=
%ISSN%&issue=%ISSUE%&pages=%PAGES%&spage=%SPAGE%&title=%TITLE%&volume=
%VOLUME%&isbn=%ISBN%
```

The `%STRING%` values are placeholders that must be replaced with a value.

If no value exists, the `%STRING%` values do not appear in the URL. In other words, `at-`
`itle=%ATITLE%&aufirst=&auinit=%AUINIT%`.

The link resolver must be configured to populate the URL elements with the appropriate values.

13.2.2. Matching the Message Subject Line

Before the Voyager ILL Request module can receive requests, a message subject line matching one in the
`web.xml` file must be created in Voyager ILL Request.

Procedure 13.1. Matching the Message Subject Line

1. Open the `web.xml` file on the OPAC (WebVoyáge) server (`/ml/voyager/xxxdb/tom-`
    `cat/VoyagerILL/context/VoyagerILL/WEB-INF`).

2. Locate the `<init-param>` element with the `<param-name>` element of `MailSubj`. Enter a mes-
    sage subject line in the `<param-value>` element of the MailSubj `<param-name>` element. See
    Figure 13.1, "Message Subject Line (MailSubj) Element in web.xml File" (page 13–2) for an ex-
    ample.

```
<init-param>
        <param-name>MailSubj</param-name>
        <param-value>ILL Request from Resolver</param-value>
</init-param>
```

Figure 13.1. Message Subject Line (MailSubj) Element in web.xml File

3. Open the Voyager ILL Request module.

4. Select the **Options** menu and the **Setup Email Server Information** submenu.

    ### Result

    The **My Email Information** dialog box displays.

Figure 13.2. My Email Information Screen

5. Enter the message subject line text from the MailSubj `<param-value>` element (entered in Step 2 (page 13–2)).

Important

Enter the text in the **MsgSubjectLineText** listbox *exactly* as entered into the `MailSubj` element of the `web.xml` file

Important

You must perform a stop/start sequence on Tomcat after changing the web.xml file.

13.2.3. Adding the ILL Email Return Address to the web.xml File

Before structured ILL Request emails can be sent from the ILL Extended Service to the Voyager ILL Module, you must configure the email address to send requests to.

Procedure 13.2. Adding the ILL Email Return Address to the web.xml File

1. Open the Voyager ILL Request module.

2.   Select the **Options** menu and the **Setup Email Server Information** submenu.

Result

The **My Email Information** dialog box displays.

3.   Leave the **My Email Information** screen open or copy the information from the **My Email Return
Address** field.

4.   Open the `web.xml` file on the OPAC (WebVoyáge) server (/m1/voyager/*xxx*db/tom-
cat/VoyagerILL/context/VoyagerILL/WEB-INF).

5.   Locate the `<init-param>` element with the `<param-name>` element of `ToAddresses`.

6.   Enter the information from the **My Email Return Address** field into the `<param-value>` element
of the `ToAddresses` `<param-name>` element. See Figure 13.3, "Email Address (ToAddresses)
Element in the web.xml File" (page 13–4).

```
<init-param>
        <param-name>ToAddresses</param-name>
        <param-value>illstaff@univ.edu</param-value>
</init-param>
```

Figure 13.3. Email Address (ToAddresses) Element in the web.xml File

Important

You must perform a stop/start sequence on Tomcat after changing the web.xml file.

13.2.4. Setting the ILL Operator Email Address

Use the following procedure to set the ILL operator email address.

Procedure 13.3. Setting the ILL Operator Email Address

1.   Open the `web.xml` file on the OPAC (WebVoyáge) server (/m1/voyager/*xxx*db/tom-
cat/VoyagerILL/context/VoyagerILL/WEB-INF).

2.   Locate the `<init-param>` element with the `<param-name>` element of `FromAddresses`.

3.   Enter an email address at which ILL Operators receive ILL Request information into the
`<param-value>` element of the `FromAddresses` `<param-name>` element. See Figure 13.4,
"Email Address (FromAddresses) Element in the web.xml File" (page 13–4).

```
<init-param>
        <param-name>FromAddresses</param-name>
        <param-value>IllOperatoraddress@univ.edu</param-value>
</init-param>
```

Figure 13.4. Email Address (FromAddresses) Element in the web.xml File

This address is for ILL Operators to obtain a copy of requests to review, and/or process, depending on
your institution's ILL workflow.

Important

You must perform a stop/start sequence on Tomcat after changing the web.xml file.

13.2.5. Enabling Voyager Patron Groups to Place ILL Requests

Before patrons can place ILL Requests using the ILL Extended service, they must belong to a patron group authorized by the service to place ILL Requests. This is done in the `Authorization Filter` of the `web.xml` file. Use the following procedure to set the `Authorization Filter`.

Procedure 13.4. Enabling Voyager Patron Groups to Place ILL Requests

1. Run `patron_VoyagerILL.ksh` that is located in /m1/voyager/*xxx*db/tom-cat/VoyagerILL/context/VoyagerILL/WEB-INF to get the patron groups that should be defined in the `web.xml` file.

Result

This generates an XML-formatted list of patron groups into the file `web.xml.pg.snippet` in the same directory path. See Figure 13.5, "web.xml.pg.snippet Example" (page 13–5).

```
<filter>
        <filter-name>Authorization Filter</filter-name>
        <filter-class>com.endinfosys.voyager.PatronGroupAuthorization
Filter</filter-class>
                <init-param>
                        <param-name>PatronGroup.1</param-name>
                        <param-value>FAC</param-value>
                </init-param>
                <init-param>
                        <param-name>PatronGroup.2</param-name>
                        <param-value>GRAD</param-value>
                </init-param>
```

Figure 13.5. web.xml.pg.snippet Example

The `web.xml.pg.snippet` file should reflect the Patron Groups codes stored in Voyager System Administration. See Figure 13.6, "Patron Group in Voyager System Administration" (page 13–6).
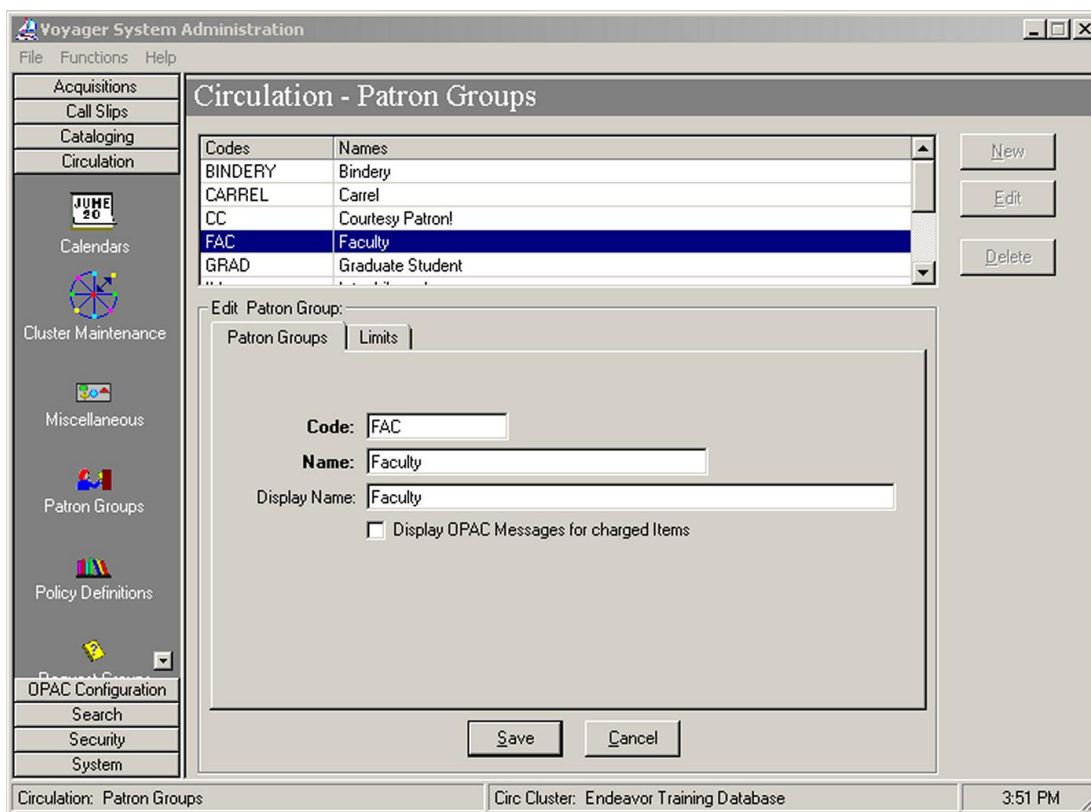
Figure 13.6. Patron Group in Voyager System Administration

2. Open the `web.xml` file on the OPAC (WebVoyáge) server (/m1/voyager/*xxx*db/tom-cat/VoyagerILL/context/VoyagerILL/WEB-INF).

3. Copy the contents of the `web.xml.pg.snippet` file and replace the existing `<filter-name>`Authorization Filter`</filter-name>` rows in the `web.xml` file with the `web.xml.pg.snippet` file contents.

Note

Any patron groups that are not allowed to make ILL requests should not be copied into the `web.xml` file.

4. Save and close the `web.xml.pg.snippet` file.

Important

You must perform a stop/start sequence on Tomcat after changing the web.xml file.

13.2.6. Setting the Persistent Login Timeout Value

When patrons log in to the ILL Extended Service Login screen, the service can keep them logged in to subsequent sessions. This is dependent on the persistent login setting for this service. The persistent login is set in the `ExpireIntervalInMinutes` initialization parameter of the `web.xml` file.

Procedure 13.5. Setting the Persistent Login Timeout Value

1. Open the `web.xml` file on the OPAC (WebVoyáge) server (/m1/voyager/*xxx*db/tom-cat/VoyagerILL/context/VoyagerILL/WEB-INF).

2. Locate the `<init-param>` element with the `<param-name>` element of `ExpireIntervalIn-Minutes`. See Figure 13.7, "Persistent Login Initialization Parameter in the web.xml File" (page 13–?).

```
<init-param>
        <param-name>ExpireIntervalInMinutes</param-name>
        <param-value>0</param-value><!-- 0 means only
exist for single transaction -->
</init-param>
```

Figure 13.7. Persistent Login Initialization Parameter in the web.xml File

3. Enter one of the following setting values:

   – 0 to force patrons to log in each time they place an ILL Request using the service.

   – A non-zero number to reset the login at that interval in minutes.

   Example: `<param-value>3</param-value>` causes the service to reset the login three minutes after the patron logs in.

Important

You must perform a stop/start sequence on Tomcat after changing the web.xml file.

13.2.7. Setting the ARTEmail Flag

If you are a British Library customer, you must enable ARTEmail in the ILL Extended Service configuration. Once enabled, the ILL Extended service adds an ARTEmail designator to the request type field in the request. You enable/disable ARTEmail support in the `UseARTEmail` initialization parameter of the `web.xml` file.

Procedure 13.6. Setting the ARTEmail Flag

1. Open the `web.xml` file on the OPAC (WebVoyáge) server (/m1/voyager/*xxx*db/tom-cat/VoyagerILL/context/VoyagerILL/WEB-INF).

2. Locate the `<init-param>` element with the `<param-name>` element of `UseARTEmail`. See Figure 13.8, "ARTEmail Configuration Element in web.xml File" (page 13–7).

```
<init-param>
        <param-name>UseARTEmail</param-name>
        <param-value>No</param-value>
</init-param>
```

Figure 13.8. ARTEmail Configuration Element in web.xml File

3. Enter one of the following setting values:

   – No if you are not a customer of The British Library.

   – Yes if you are a customer of The British Library.

Important

You must perform a stop/start sequence on Tomcat after changing the web.xml file.

13.2.8. Configuring Instructional and Error Message Text

The files in Table 13.1, "Information and Error Message Files" (page 13–8) contain informational and error message text. If you are familiar with XSL, you can edit the message text.

Table 13.1. Information and Error Message Files

File and Path	Contains
ILLRequest.xsl /m1/voyager/*xxx*b/tom-cat/Voyager-ILL/context/VoyagerILL/LFP/templates/html/*en*	Request screen title and message text.
Login.xsl /m1/voyager/*xxx*b/tom-cat/Voyager-ILL/context/VoyagerILL/LFP/templates/html/*en*	Field labels and messages related to the ILL Extended Service login page.

13.2.9. Changing Patron First and Last Name Order in the Structured Email (OCLC Customers)

By default, the structured email sent to the Voyager ILL module populates the patron field in the format of:

```
first_name last_name
```

If you want to change the order of the first and last names in the email, change the `Patron=` variable in the `openURL2ILL.map` file (`/m1/voyager/`*xxx*`db/tom-cat/VoyagerILL/context/VoyagerILL/config`) from `calculated_patron_name_fl` to `calculated_patron_name_lf`.

13.3. Stopping, Starting, and Restarting Tomcat

After editing the `web.xml` file, you must stop and start your Tomcat server. Follow the steps in Stopping and Starting the Tomcat Server (page 13–8).

Procedure 13.7. Stopping and Starting the Tomcat Server

1. Log in as the user **voyager**.

2. Navigate to `/m1/voyager/`*xxx*`db/tomcat/default`.

3. Type **tsvrctl -stop**.

Important

Keep in mind that server shutdown can take up to 10 minutes depending on your system. Be sure to wait until the server has been shut down before restarting it.

4. Once the server has stopped, type **tsvrctl -start**.

Chapter 14. Reports and Statistics

14.1. Overview

One of the most important things to remember about Statistical reports is that if you don't put data in you can't get data out. For example, some users need to have periodic reports created which tabulate the number of requests made by different types of patrons such as patron status.

In this case, it is important that the status of the patron be captured at the time the request is submitted and in a standard manner. Your web page for submitting requests should make this field mandatory and provide a drop-down box with a list of your acceptable statuses for the patron to select from.

In addition, you need to verify that this information is being transferred to your ILL database. The best way to do this is to generate a sample of the reports that you expect to need soon after you have started using ILL to make sure that the report contains the information that you expect. If you wait until the end of the quarter or year and discover that the patron status information is missing, it is too late! If the report doesn't contain the data you put in, contact technical support.

Clicking the Statistics button on either the Borrowing or Lending Main Menu presents the Reports and Statistics screen. Both screens are operated in the same manner.

This screen allows you to prepare several different reports that are based upon the borrowing or lending requests stored in ILL's database. The specific reports available are shown on the left side of the screen. You select one by clicking on the button next to it.

Next you choose the time period to be covered by the report. Selecting Previous Month or Previous Year will included all processed borrowing requests for the previous calendar month or year. Choosing Specify allows you to select any time period you wish. The date associated with each request is the date on which the item was reported YesLoan, YesCopy, No, or Conditional for lending requests. For borrowing requests, it is the date on which the item was reported RecLoan, RecCopy, Unfilled, or Cancelled. This date is called the Statistics Date in the database.

Any requests located in your ILL archive will be automatically included in your statistics reports.

Finally, you select the set of borrowing libraries or group(s) of libraries you wish to be included in your report. Choosing All Groups produces the report type you have selected for the time period you selected for all groups of libraries where the statistics will be reported by group. If you choose Libraries, you may select All Libraries or the members of a specific group or a specific library.

The Reason for NO Report automatically displays all libraries.

14.2. Borrowing Reports

The Items Received/Unfilled Report counts Copies and Loans for each library or group in the Report. If you base the Report on All Groups or All Libraries, the Total Number of Unfills will be displayed at the top of the Report.

The Method Requests Submitted Report counts requests submitted by each transmission method, such as OCLC or Mail.

The Method Item Received - Loans and Method Item Received - Copies Reports count copies and loans received by each shipping method. In order to get results from this report you will need to be selecting a method received when updating a request to Received Copy or Received Loan.

The Patron Status Report provides a summary of all of your Borrowing Requests according to the Patron Status information entered in the original Borrowing Request. The report provides totals for Loans and Copies aggregated by Filled, Unfilled and Canceled. There is also a grand total for the number of requests and the lending charges.

The Borrowing Requests by Department Report counts Filled, Unfilled, Canceled, Copies and Loans, Total Copies, Total Loans, Total number of requests, and the Total Charges for each Patron Department. The De-

partments may be taken from the Borrowing Request records or the Patron Database. If you maintain a Patron database, you may have fewer occurrences of Chem and Chemistry appearing as different categories in the report if you choose the Patron Database option. However, if you do not keep a complete Patron database, you will probably want to choose the Borrowing Request option, to ensure that the information you see on the report is complete.

The Branch Library Report counts Filled, Unfilled, Canceled, Copies and Loans, Total Copies, Total Loans, Total number of requests, and the Total Charges for each of the Branches of your library.

The Borrowing Turnaround Time Report provides a summary of all of your Borrowing Requests according to the amount of time between the Initial Request Date and the Received Date. The data are aggregated by Loans and Copies. There are averages for each provided as well.

There are two Collection Development Reports, one for copies and one for loans. These reports provide a summary of all of your Borrowing Requests by Department and Title and Patron. Thus you can tell whether many Patrons are requesting a particular Title or that Title is being requested by the same Patron many times.

The Custom Search Report provides a summary of all of your Borrowing Requests according to the contents of the Custom search field information entered when the Borrowing Request was updated. The report provides totals for Loans and Copies. There is also a grand total for the number of requests and the lending charges.

14.3. Copyright Reports

Borrowing requests that have the copyright compliance field set to CCG are used in the Copyright Status Report and the Copyright Compliance Report. Borrowing requests that are not coded CCG are not a part of these reports. The ISSN and publication year are extracted from the OCLC record when they are in recognizable format. They may also be entered or corrected manually on the Borrowing Status Update screen. The number of pages actually received is entered there.

These following reports use this information and also use the Rule of Five:

- The Copyright Status Report lists counts for each title - the number of requests pending and the number actually received. Only those titles with a total count greater than the number entered into the small text box labeled "Number exceeds:" are listed on the report.

- The Copyright Compliance Report lists by title and publication year the total number of copies and the total number of pages. By default the first five copies received in a calendar year have been removed from these totals. There is a small text box where you can change this to a different value, such as 0 (zero).

14.4. Lending

The Major Stats Report counts Free/Paid Copies and Loans, Unfills and the Total Requests or each group or library in the report.

The Method Requests Received Report counts requests received by each transmission method, such as OCLC or Mail.

The Method Shipped - Loans and Method Shipped - Copies Reports count copies and loans sent by each shipping method.

The Reason for NO Report lists each Borrower, and counts the number of No items reported with each reason. The Borrowers are ordered, highest to lowest, by the total number of requests updated to No during this time period. The Reasons are ordered across the top of the report, highest to lowest, by the total number of times that reason was used during this time period.

The Financial Summary Report summarizes all of your lending charges by Borrowing Library aggregated by Loans and Copies.

The Lending Turnaround Time Report provides a summary of all of your Lending Requests according to the amount of time between the date that the request was received and the date that the request was filled. The data is divided into Loans and Copies. There are averages for each provided as well.

The Branch Library Report counts Filled, Unfilled, Copies and Loans, Total Copies, Total Loans, Total number of requests, and the Total Charges for each of the Branches of your library.

14.5. More Reports ...

Previous custom reports that were downloaded as a separate module are now built-in to ILL. There are 17 reports that can be accessed through the More Reports… button on either the Borrowing or Lending Reports & Statistics screens.

Here are the following reports you can run:

- A combined Department and Status report. Borrowing requests are tabulated by Department and Status within each Department.

- Two new copyright reports that provide information on the Lender for each Title.

- Three reports for tabulating your Top Borrowers.

- Three reports tabulating for your Top Lenders.

- A report that lists all libraries that do not belong to any library group.

- A Borrowing Turnaround time report for groups.

- A Borrowing Turnaround time report for libraries.

- A report which lists each Journal Title and the citation date, sorted by Title.

In addition to the built in reports, there are two other means provided for you to generate the reports you need.

First, you may export a selected set of data to Microsoft Excel from either the Borrowing or Lending Search screens.

Second, you may create your own application in Microsoft Access where you can open your ILL database and attach any of its tables. We have set the protection on the ILL data tables so that you can read them. You may then extract the information of interest and create your own custom report without fear of harming your ILL database. You may even wish to process the data, reformat it and send it to a file that might, for example, go to your campus accounting system. We will talk to your technical people and provide information about the table structure if they need help.

14.6. Group Add/Modify

If you click on the Group Add/Modify button on either of the Statistics screens you'll see the Statistical Group Setup screen.

Figure 14.1. Statistical Group Setup

Here you can choose one of your groups. The libraries that are currently members of that group are displayed in the right-hand box. You can remove a member by selecting the symbol in the right-hand box and clicking on the left arrow button. You can add a member by selecting the library's symbol in the left-hand box and clicking on the right arrow button.
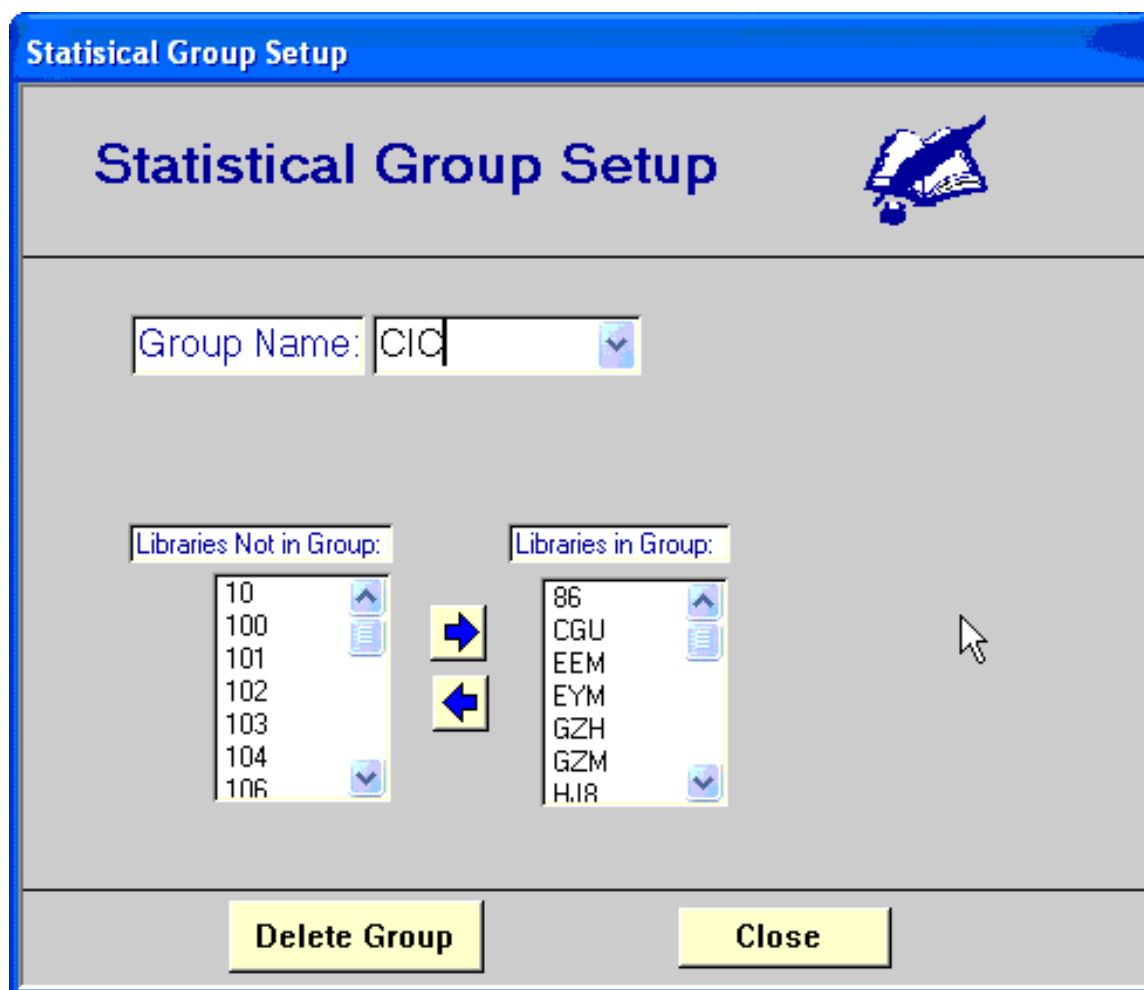
Here you can choose one of your groups. The libraries that are currently members of that group are displayed in the right-hand box. You can remove a member by selecting the symbol in the right-hand box and clicking on the left arrow button. You can add a member by selecting the library's symbol in the left-hand box and clicking on the right arrow button.

Chapter 15. Archiving Your Data

15.1. Archiving Functions

The Archiving functions (accessed through the Administration menu) allows you to move completed borrowing requests such as ones that are Received Copies, Returned, Canceled or Unfilled, to separate tables in ILL's database. These tables are named BorrowingRequestsArchive and LendingRequestsArchive. You can specify the default minimum age of the records for archiving by going to Preferences/Notices Archive and selecting either Bor Archive or Lend Archive. If you want to archive another minimum age of records but want to keep the default you can enter another date in the Archive Request window when preparing to perform the archive. Archiving records occasionally will speed up the search screen and the updating process somewhat. After archiving data, you should Compact and Repair the database using the Administration menu.

In order for a borrowing request to archive, it must meet the following conditions:

- The status internal must be either RecCopy, Unfilled, Cancelled, or Returned.

- The reqdate and statistics date (if it has a statistic date) must be prior to the archive date.

- The StatusUpdateNotReported should be No.

(Go to Administration/Open Tables/Borrowing Requests to see these fields. You don't have to look at the fields but if you were curious as to why one of the requests did not archive then you can determine why.)

Archiving requests on the lending side will depend upon not only the completed status (YesCopy, No, or Complete) and whether the request has been reported to OCLC (StatusUpdateNotReported field should be No) but on whether the request meets the standards that you set when you begin your archive.

If you have the option to only archive paid requests then requests that have invoices as the billing method should have a Yes in the PaidVerified: field. If you have the option to archive only verified IFM requests then the PaidVerified: must have a Yes. If lending requests that are completed but do not meet the standards of verification that are needed due to their billing method then they will not be archived until they are considered verified.

You can select the option to archive paid and unpaid lending requests. You can also choose to archive IFM records that have not been verified.

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