

INTERLIBRARY LOAN



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AGENDA



- ❧ OCLC Direct Request
- ❧ Referrals
- ❧ Did You Know (DYK) – Interlibrary Loan
 - ❧ Archiving ILL Requests
 - ❧ Locate in Progress
 - ❧ Mediated Lending Requests
 - ❧ Messages
 - ❧ Renewals
- ❧ Unmediated vs. Mediated
- ❧ E-Delivery Preferences
- ❧ Change Status



OCLC Direct Request

Using it: NBJ, NDJ, NDV, NMI, NMY, UND

Just Requested: NDI



When an ILL request cannot be fulfilled via Aleph, the OCLC-Direct supplier may be used to “automatically” transfer the request to the library’s OCLC Review File in the Resource Sharing tab of WorldCat.

All subsequent updating (Receive, Return, etc) must be done manually in the Aleph system parallel to what’s happening in OCLC.

This merely eliminates the xxx to xxx processing

Workflow – OCLC Direct Request



ALEPH – Step 1

- ☞ Manually add the OCLC-Direct lender to the list of potential suppliers via the Add Supplier button
- ☞ Click Send

OCLC – Step 2

- ☞ The request is transferred via Aleph into the Review file in the Resource Sharing tab of WorldCat
- ☞ Process in OCLC as you normally would

Workflow – OCLC Direct Request



OCLC/Aleph – Step 3 Item arrives @ library

- ❧ Process via OCLC first
- ❧ Then Receive in Aleph ILL and check out in Aleph Circ (if you use Circ)
- ❧ Patron uses Item
 - ❧ Any renewals would need to be handled via OCLC and manually updated in Aleph CIRC & ILL

Aleph/OCLC – Step 4 Patron returns item to library

- ❧ Check in via Aleph Circ (if you use Circ)
- ❧ Return request in Aleph ILL (request will close)
- ❧ Process Return in OCLC and return item to lending library

REFERRALS / NDS



❧ Definition – You send an ILL request to the ND State Library to fill outside of ODINland

- ❧ NDS determines “who” to refer request to & then they message you the ILL referral request # they will use
- ❧ When item arrives at NDS, staff update “their” ILL referral request # & then message you that the item is on it’s way

- ❧ When you receive the item in the mail
 - ❧ Use Change Status button to change request status on your ILL request # to Shipped
 - ❧ Then use Receive button to receive the item – use due date provided by NDS & use the barcode format of ill-[request#] – example: ill-2658
 - ❧ If you use Aleph Circ, check barcode (example: ill-2658) out to patron (or it’s checked out automatically)
 - ❧ Patron uses item and then returns item to library
 - ❧ Then use the Return button to return the item & then send item back to the ND State Library

- ❧ When NDS gets item back, they will message you that the item is back

- ❧ Then use Change Status button to change request status to Closed

DYK : Archiving ILL Requests

<http://www.odin.nodak.edu/node/228>



BORROWING

❧ ill-88

❧ Archives:

❧ Cancelled

❧ Closed

❧ Deleted

❧ Expired

❧ Unfilled

LENDING

❧ ill-89

❧ Archives:

❧ Closed

❧ Cancelled by Requester

❧ Deleted

❧ Expired

❧ Answer Unfilled

Requests are still searchable in ALEPH & used for statistics

DYK : Locate in Progress



- ❧ <http://www.odin.nodak.edu/node/181>
- ❧ Different way to say: **LOCATE FAILED**
 - ❧ No isbn (020); No issn (022); No lc-number (010)
 - ❧ No available items
 - ❧ No available libraries (closed, not doing ILL, etc)
- ❧ Request needs further processing
- ❧ Within binoculars search – note availability line
- ❧ Remember you may Add Supplier manually
 - ❧ ND State Library, MN libraries & Minitex go outside ODIN network or use the OCLC Direct Request process

DYK : Mediated Lending Requests



- ⌘ <http://www.odin.nodak.edu/node/201>
- ⌘ **LOCATE has failed, because....**
 - ⌘ No available items **because item is checked out!**
 - ⌘ Non-circulating
 - ⌘ No isbn (020); issn (022); lc # (010) or music # (028)
- ⌘ Indicates request needs further processing
 - ⌘ Find & Send
 - ⌘ Within binoculars search – note availability line
 - ⌘ Add isbn, issn, lc# or music # manually & re-locate
 - ⌘ Unfill

DYK : Messages & Renewals



MESSAGES

- ❧ <http://www.odin.nodak.edu/node/208>
- ❧ Stay on top of messages as they are usually time-sensitive
- ❧ DISMISS a message when it's merely informational - this removes it from the Message category but keeps message attached to request
- ❧ MESSAGE back to all questions & remember to check the DISMISS in the workflow
- ❧ Message Types:
 - ❧ Cancel Reply
 - ❧ General Messages (most common)
 - ❧ Status Query
 - ❧ Status or Error Report
 - ❧ Request for Renewal (only appears when there is a request for renewal)

RENEWALS

- ❧ <http://www.odin.nodak.edu/node/194>
- ❧ Not all ODIN libraries grant renewals for ILL items
- ❧ Remember that when you or a patron request a renewal, it's up to the lending library to reject or accept - if accepted, all due dates in CIRC & ILL are updated
- ❧ Requests for renewal appear in lending Received Messages category 'Request for Renew'
- ❧ After granting or rejecting renewal remember to DISMISS message
- ❧ Accepted or Rejected renewals appear in Borrowing in the Renewed category

Unmediated vs Mediated



UNMEDIATED

- ❧ All automated
- ❧ You work with the errors & exceptions
- ❧ DIV & NDW have indicated interest to try it out

MEDIATED

- ❧ Manual steps
- ❧ Labor intensive
- ❧ Urge to delete suppliers is high & sequence gets thrown off

Things Ellen will be working on



- ❧ What is allowed for ILL checkout and what is not
 - ❧ Further table set-up
- ❧ Supplier levels
 - ❧ Local – level 1
 - ❧ Ex. Carrington Elementary, Carrington Public
 - ❧ Next preference – level 2
 - ❧ Ex. Velva, Valley City, Jamestown, Hope-Page, Finley-Sharon
 - ❧ Next preference – level 3
 - ❧ All academics that are not covered in levels 1 & 2
 - ❧ etc
- ❧ ue-19 processing

E-Delivery Preferences



☞ http://www.odin.nodak.edu/staff/E-Delivery_Methods_ILL.htm

☞ Options to send electronically:

- ☞ Email (provide email address)
- ☞ Fax (provide fax #)
- ☞ Ariel (provide ariel address)
- ☞ Something else (such as Odyssey) (provide specifics)



☞ Need to get this list updated – please send in an ODIN Help Desk ticket to <http://www.odin.nodak.edu/webticket> and list:

- ☞ Library Code
 - ☞ E-Delivery Preference 1
 - ☞ E-Delivery Preference 2 (if applicable)
 - ☞ E-Delivery Preference 3 (if applicable)
 - ☞ E-Delivery Preference 4 (if applicable)

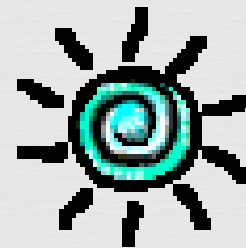


- ⌘ Know what you are doing
- ⌘ Provide notes so others know what you were thinking
- ⌘ Change Status options controlled by ODIN Office
- ⌘ Impacts only one side – use messages to keep other side informed



CHANGE STATUS

A manual Change Status should ALWAYS be followed by a transaction

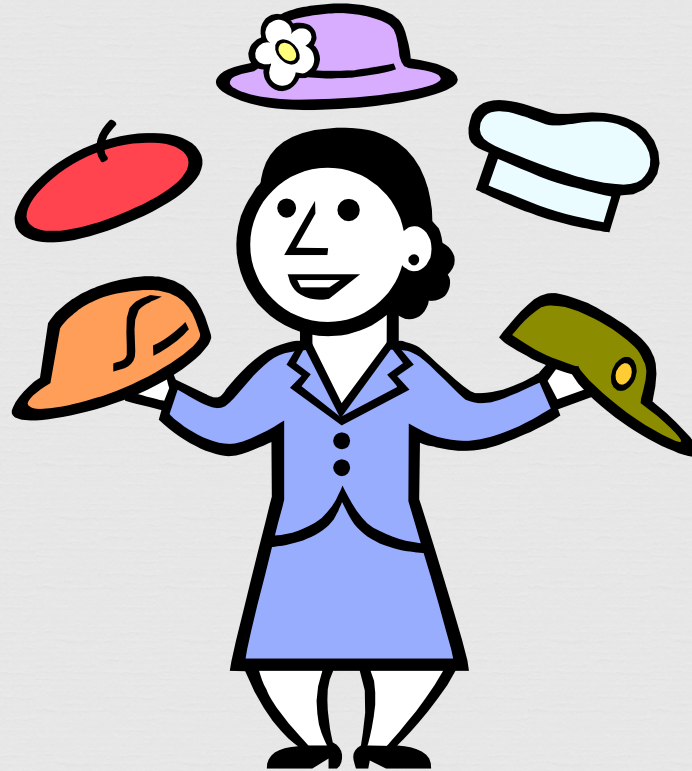


Miscellaneous



- ❧ Remote Service Errors – in most cases, something is wrong with:
 - ❧ **Global Patron Information node**
 - ❧ Make sure ILL library and Home library are for same ADM
 - ❧ Make sure there are sufficient ILL Total Limits and ILL Active Limits
 - ❧ 9999 in ILL Total Limits means unlimited ILL
 - ❧ A # in ILL Active Limits limits how many “OPAC” ILL requests may be active at any one moment
 - ❧ **Local Patron Information node**
 - ❧ Make sure the expiration date is “in future”
 - ❧ Make sure there is a patron status

OPEN DISCUSSION





Did this session help you?

What could be done to improve things?

Would you attend another ODIN Work Day?