



# Aleph ILL Tips, Tricks and Updates

Agnes Lee- Minitex

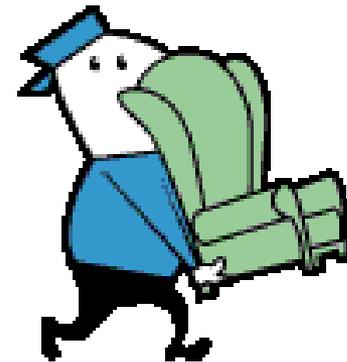
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# Alma Resource Sharing

- U of MN is moving to Alma in December 26th
- Limited Alma Resource Sharing /  
ILL functionality



# Moving Day!

- Minitex will relocate their ILL units: MNU & MII



# Moving Day - Checklist

- Know how to exchange requests with Minitex and University of Minnesota Twin Cities
- Clean out the clutter
- Deadline dates



# New ILL units

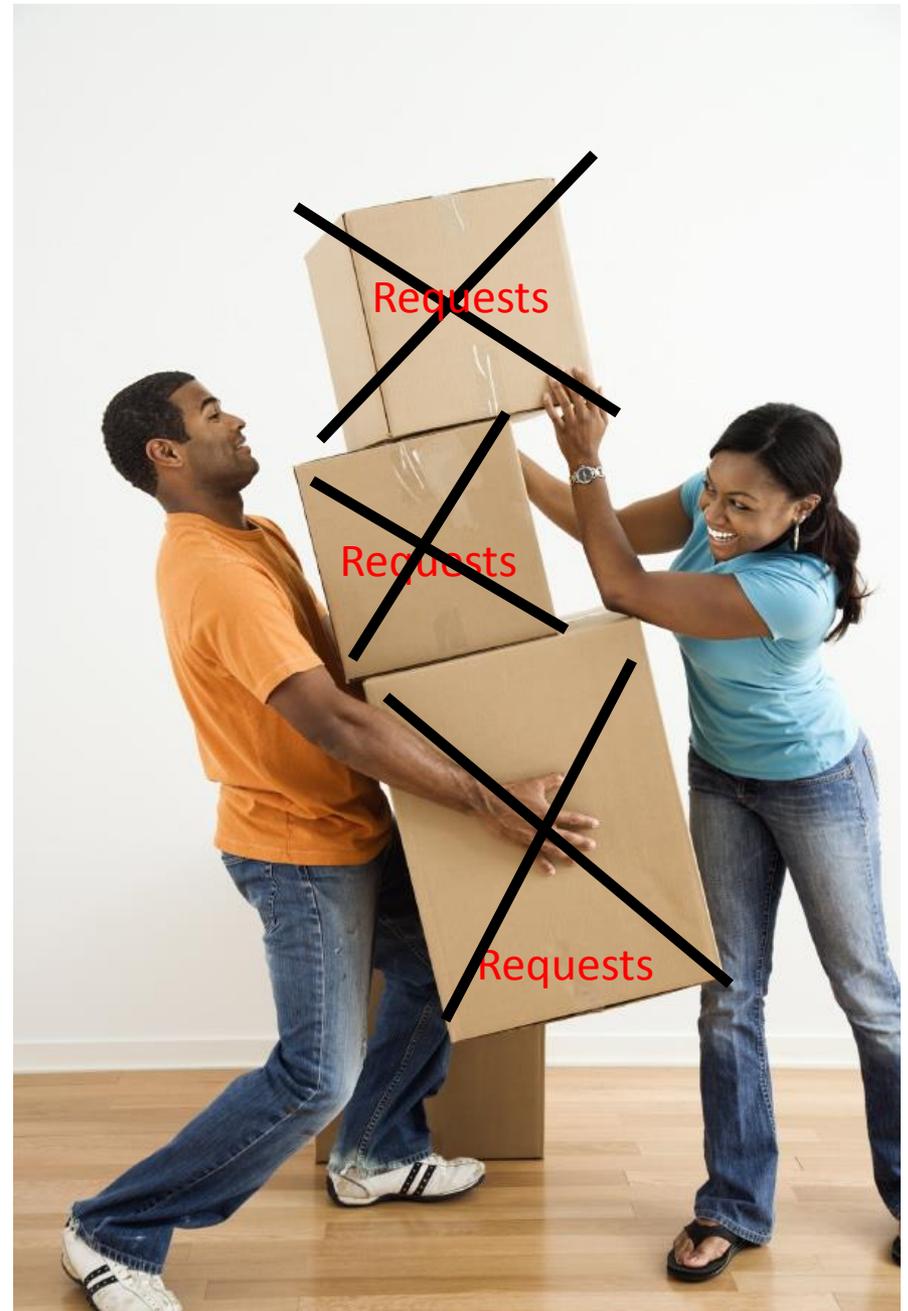
- Minitex and University of Minnesota Twin Cities new ILL unit codes
  - ODIN, SDLN and MnPALS servers
- Add new units to Potential supplier List
- Lending slip code may be different

# Stay tuned



- Each server ODIN, SDLN and MnPALS will be communicating
  - New Minitex and University of Minnesota codes
  - How to handle Potential Supplier list changes

- No requests will be moved from the University server
- Minitex may have access for awhile to requests



# Moving Day - Checklist

- ✓ Know how to exchange requests with Minitex
  - Clean out the clutter
  - Deadline dates



# Clean out the clutter

- Messages
- Overdue and lost
- Update “Shipped” copies to “Closed”



# Handle overdue



- Lender & Borrower
- Review Overdue categories
- Contact patron
- Contact request partner



# Overdue borrowing requests

- Look at the Request Log
  - Problem with request
- Check shelves
- Contact the Patron
- Message request a bill



# Overdue Lending requests

- Review the Request Log
  - Problem with the request
- Check your Shelves
- Message about bill

# Lost items

## Lender

- Communicate with Borrowing library
- Send bill promptly

## Borrower

- Request a bill
- Communicate with Lender
- Prompt resolution

# Borrowing Requests- Lost

ALEPH View Borrowing Lending \*Services Help ?

Request Number [ ] [ ] → Group Status = Lost - MINITEX (MII)

Request Number [ ] [ ] →

Filter by: Active Supplier

No. of Requests	Request Info.
4	All
1	Gustavus Adolphus College (MNG)
1	MINITEX (MII)
1	Metropolitan State University (XOJ)
1	University Center Rochester (RCC)

**Functionalities:**

- [1] Functional
- [2] Summary
- [3] View Active Statuses

**Statuses:**

- New (1)
- Waiting for Process (3)
- Pending (10)
- Shipped (7)
- Unfilled (0)
- Replies-Staff Review (0)
- Received (59)
- Returned (12)
- Renewed (12)
- Recall (0)
- Overdue (31)
- Lost (4)
- Cancel (6770)
- Closed (32070)
- Expired (0)

**Received Messages:**

- Cancel Reply (194)
- General Message (1)
- Status Query (0)
- Status or Error Report (0)

# Borrowing Lost

- Review Request Log
- Message for Bill
  - Pay or replace varies by lenders policy
- Prompt Resolution

# Lending Requests- Lost

ALEPH View Borrowing Lending \*Services Help ?

Request Number [ ] [ ] [ ] [ ]

Request Number [ ] [ ] [ ] [ ]

[ ] [ ] [ ] [ ]

[1] Functional  [2] Summary

[3] View Active Statuses

**Statuses**

- Review (32)
- In Process (0)
- Shipped (404)
- Return (105)
- Conditional (0)
- Cancel (373)
- Overdue (104)
- Recall (0)
- Lost (15)
- Damage (2)
- Not Supplied (28222)
- Closed (64036)

**Received Messages**

- General Message (19)
- Cancel (0)
- Request for Renew (1)
- Status Query (0)
- Status Or Error Report (0)

Status Info.

Filter by: Requester ID [ ]

No. of Requests	Request Info.
15	All
1	Bemidji State University Library (MNB)
10	MINITEX (MII)
1	Southwest Minnesota State University (MNV)
1	St Cloud State University (MST)
2	Winona State University (MNI)

# Lending Lost

- Review Request Log
  - Do they need a bill?
  - Will you take a replacement copy?
  - Do you need to do a “Check-in”?

# Non-returnables

- Click on “Shipped “ category as a borrower
- Filter by Returnable and Non-returnable
- Review the Non-returnable and update



Request Number  → **Group Status = Shipped - Non-Returnable**

Request Number  →

[1] Functional    [2] Summary  
**[B] Borrowing Request List (399)**  
 [V] Borrowing Request (52142 - Shipped)  
 [L] Request Log  
**Bulk Operation**  
 Receive  
      [T] Receive Returnable  
      [N] Receive Non-Returnable  
 [R] Return

List of Requests

Title	Request No.	Status	Last Activity	Msg	Rush
Journal of Family Psychotherapy.	51292	Shipped	11/08/07		When convenient (Local)
Journal of applied gerontology.	52121	Shipped	11/15/07		When convenient (Local)
Psycho-oncology (Chichester, England).	52142	Shipped	11/15/07		Normal (Local)
Psycho-oncology (Chichester, England).	52148	Shipped	11/15/07		When convenient (Local)
Supernatural Fiction Writers: Fantasy and Horror, 2: A. E. Coppard to Roger Zelazny.	52528	Shipped	11/19/07		When convenient (Local)
Leonardo (Oxford).	53505	Shipped	11/29/07		When convenient (Local)

Sort Type: Last activity Date-Ascending

1. Request Info. | 2. Bibliographic Details | 3. Request Details | 4. Suppliers | 5. Received Messages

Line no	Partner Code	Partner Name	Av. Su	Status
01	IMNU	University of Minnesota TWIN CITIES (MNU)	5	Shipped

- Receive old journal requests
  - Receive on a workstation you don't have setup to email ILL arrival letters

# Messages

- Read and Respond Promptly



# Request Log

ALEPH ILL - Version 21 Library: TST40 - TST ILL (TST40) Server: dev21.mnpals.net:10127 User: PALS101 ILL Unit: TSTI

ALEPH View Borrowing Lending \*Services Help ?

Request Number [ ] → **Group Status = Received - MINITEX (MII)**

Request Number [ ] →

[1] Functional [2] Summary

[B] Borrowing Request List (1)

[V] Borrowing Request (2449) - Loans

[L] Request Log

Bulk Operation

Receive

[T] Receive Returnable

[N] Receive Non-Returnable

[R] Return

List of Logs

All

General (Manual log)

ILL Request Created

Supplier Request Created

Request status was changed to "Referred" ("REF")

Vouchers De-allocation

Letter was Sent to the Patron

Filter

Date/Time	Description	System note	User note	User	Action date
12/08/11 03:12 PM	Letter was Sent to the Patron	Patron letter : Information slip only - <> - sent to 000000000027		PALS101	-----
06/03/08 05:14 PM	Received Message to Responder	Received message to IMII <> Barcode: ILL-2449		EXTILL	-----
06/03/08 05:14 PM	Letter was Sent to the Patron	Patron letter : Arrival letter - <> - sent to 000000000027		EXTILL	-----
06/03/08 05:14 PM	Patron Request Status Changed	Patron Request Status changed to Loaned to Library		EXTILL	-----
07/24/07 10:54 AM	Patron Request Status Changed	Patron Request Status changed to			-----

Add

Remove A. Date

Request Log

Action Date: 00/00/0000

Transaction Type: 06

System Note: Patron letter : Information slip only - <> - sent to 000000000027

User Note:

Update

Cancel

UMWUG 2013

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# Review all categories

- Look for Minitex requests
- Look for University of Minnesota Twin Cities requests
- Keep them as up to date as possible

# Moving Day - Checklist

- ✓ Know how to exchange requests with Minitex
- ✓ Clean out the clutter
  - Deadline dates



# Deadline Dates

- Clean up – sooner the better
- New ILL units Minitex and University of Minnesota Twin Cities
  - Week of November 4th-few libraries begin
  - Week of November 18<sup>th</sup>-everyone



# Questions



# Minitex Article Exchange Delivery

Copy Password and Go to URL

The screenshot shows an email interface with the following elements:

- Subject:** Delivery of Minitex Referral Articles
- Sender:** edelivery@minitex.umn.edu
- Recipient:** to me
- Date:** Jul 30 (1 day ago)
- Actions:** Add to circles, Show details, Reply, Forward
- Content:**
  - Message: You have articles ready to be downloaded that fill the following requests:
  - Link: <http://oc.lc/XFkLup> (1223654)
  - Password: FRd7z85w
  - Request: \*\*\*Please update your record(s) as needed\*\*\*
  - Time constraints: Please note the following time constraints:
    - \*Each document file can be retrieved a maximum of five (5) times for each URL/password combination.
    - \*After thirty days, they are automatically removed from the Article Exchange site.
  - Contact: If you have any questions about this service, please call:
    - Kyle Triska at [612-625-0886](tel:612-625-0886)
    - Dave Paulson at [612-624-7568](tel:612-624-7568)
  - Notice: -----  
NOTICE: WARNING CONCERNING COPYRIGHT RESTRICTIONS  
The copyright law of the United States [Title 17, United StatesCode] governs the making of photocopies or other reproductions of copyrighted materials.
- Footer:** Click here to [Reply](#) or [Forward](#)

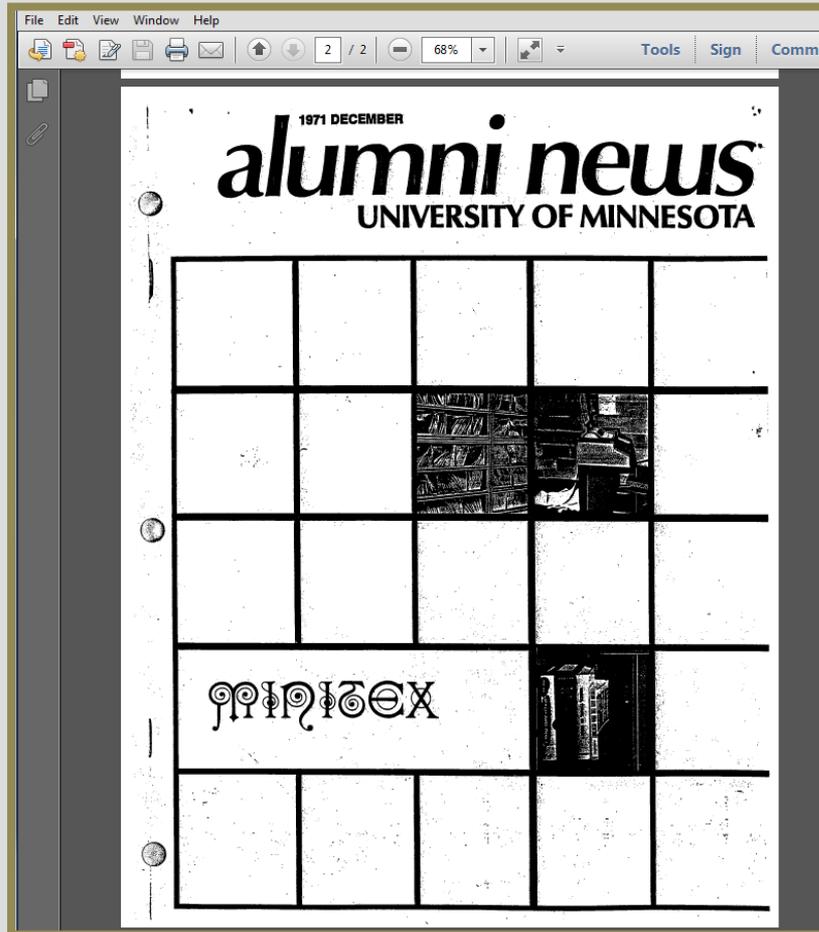
# Enter or Paste Password

## Click “Get My File”



The screenshot shows a web browser window with the address bar containing the URL <https://share.worldcat.org/ILL/articleexchange/FileDownloadLogin/gJxieJuo8>. The page header features the OCLC logo and the text "Article Exchange". Below the header, a light blue box contains the instruction "Please enter your password". Underneath this, the label "Password:" is followed by a text input field containing seven dots. A blue button labeled "Get my file" is positioned below the input field. At the bottom of the page, a small copyright notice reads: "© 2011 OCLC | Domestic and international trademarks and/or service marks of OCLC Online Computer Library Center, Inc. and its affiliates".

# View Requested Article



# Using Article Exchange to deliver using OCLC or ILLIAD

The OCLC Article Exchange service has been integrated with ILLiad processes in Lending. Libraries can send both OCLC and non-OCLC requests through Article Exchange.

Admin LHR E-mail Print Help  
Link Update ILL

**Yes**    DEFAULT     Print Shipping Labels     Print Book Straps    Group Affiliations: NTKW

**No**    In use/on loan

**Conditional**    The file is available at <http://oclc.org/hvllji>  
Lending Notes    Password: PXS4yZjh

Alert

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**GENERAL RECORD INFORMATION**

Request Identifier: **110214695**    Status: IN PROCESS 20131023  
Request Date: 20131023    Source: ILLiad  
OCLC Number: 1064483  
Borrower: **MAC**    Need Before: 20131121  
Receive Date:    Renewal Request:  
Due Date:    New Due Date:  
Lenders: \*MII, MII, MII, MII, MII  
Request Type: Copy  
ALERT:

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**BIBLIOGRAPHIC INFORMATION**

Call Number:  
Title: Journal of the National Medical Association.  
ISSN: 0027-9684  
Imprint: [East Norwalk, CT : Appleton-Century-Crofts,  
Article Author: Washington, HA  
Article Title: Segregation, civil rights, and health disparities: the legacy of African American physicians and organized medicine, 1910-1968.  
Volume: 101  
Number: 6  
Date: 2009  
Pages: 513-27

# Due dates



- Due date on Request slip
  - Should the due date be written/stamped on the slip?
  - Is the Expected Return date enough?



# How do you handle this?

- Requests from your patrons for items you own or that are freely available?
- Requests for items you will purchase?
- Requests from distance/on-line students?

# Use additional ILL unit

- Created ILL unit for the library to use
  - Tracking the request
  - Statistics
  - Service

# Version 21 and service packs

- “Patron status”, “Patron type” and “Expiry date” display on a borrowing request
- Receive can receive multiple items
- Add a lending library that answer unfilled back onto a request
- Add a lending library that sent an expired message back onto a request
- Display an ILL request “Push to Patron”

Stay tuned for updates  
as we move along

