# Aleph ILL Tips, Tricks and Updates

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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

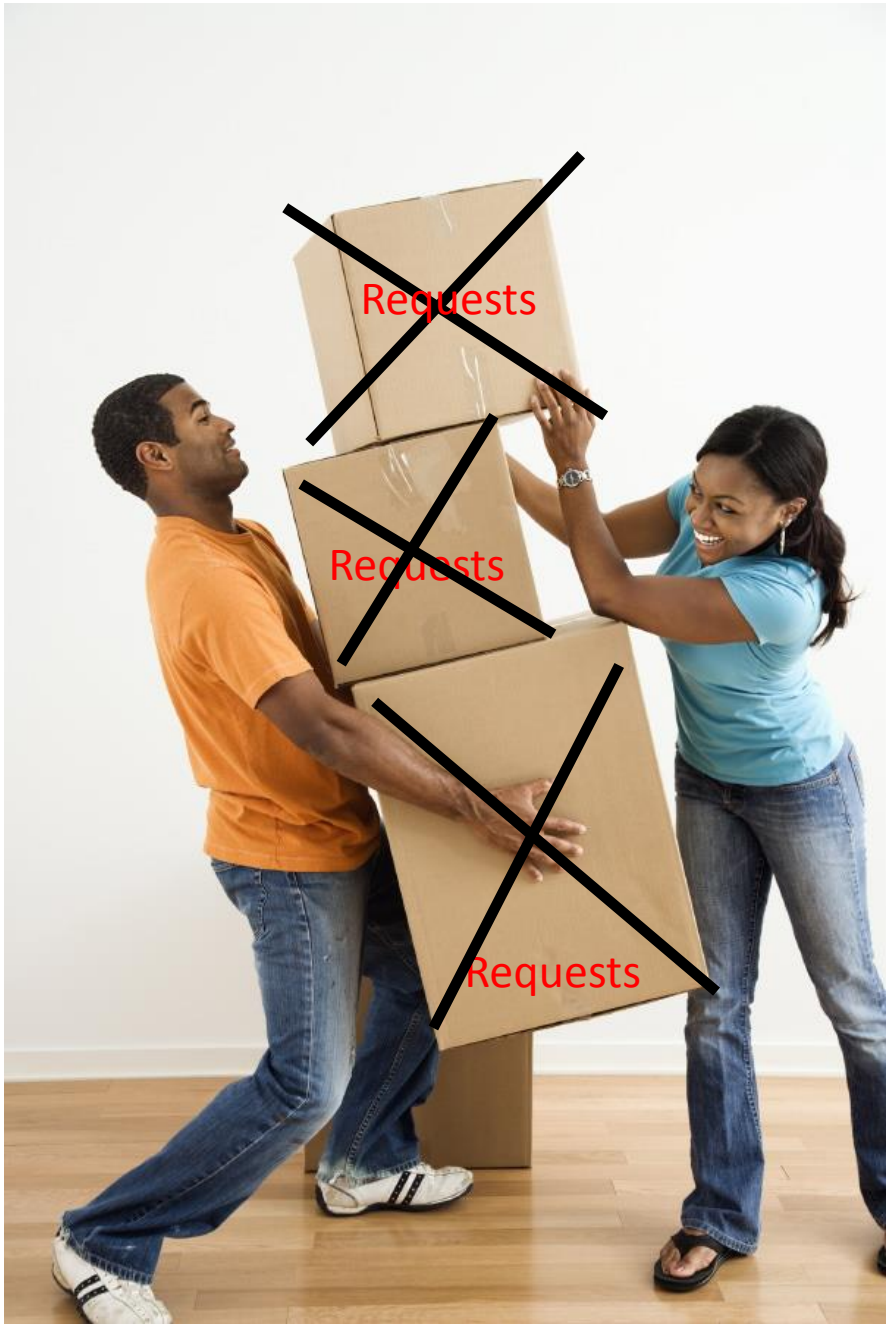
# New ILL units

- 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

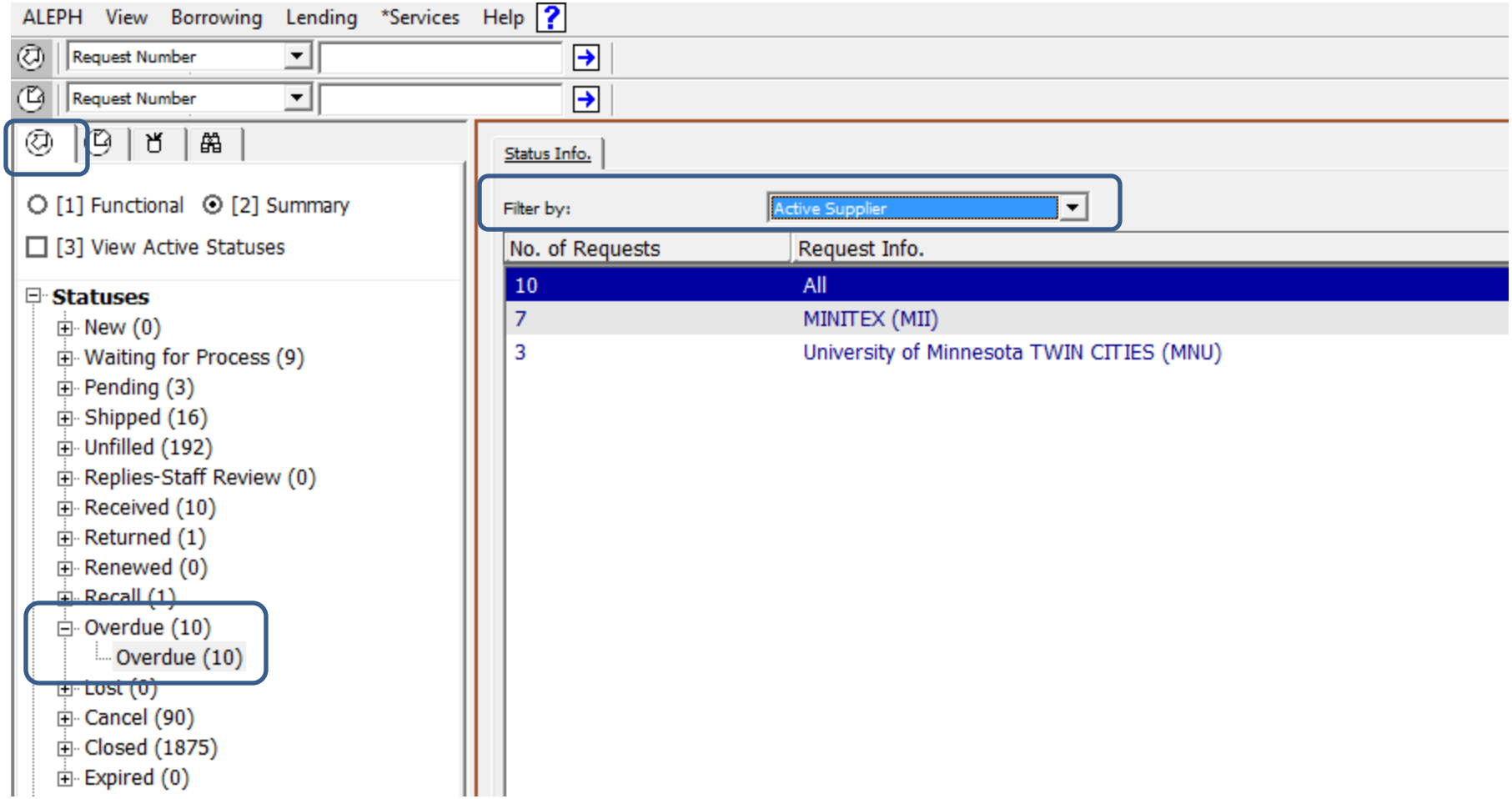
# Clean out the clutter

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

# Handle overdue

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

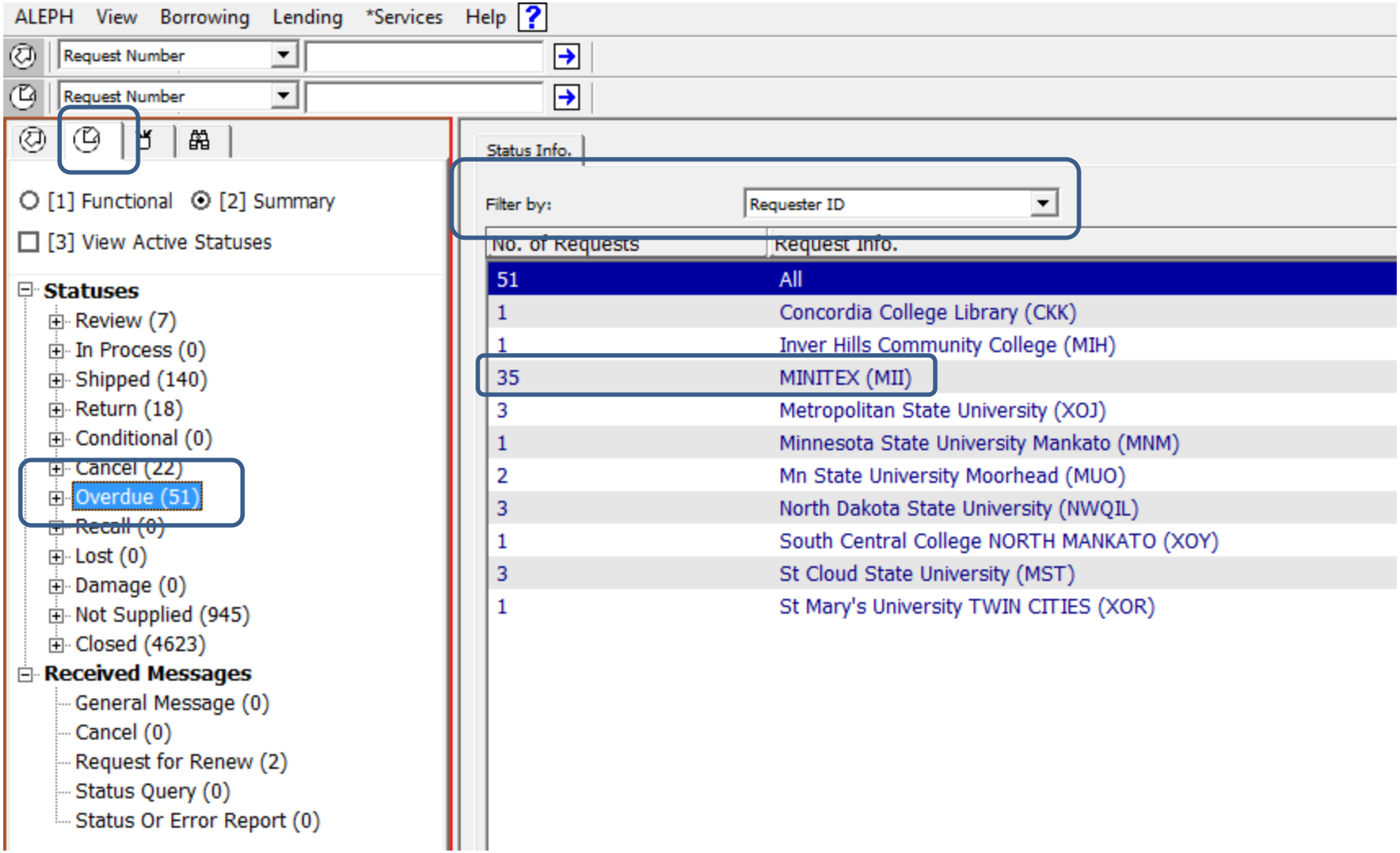
# Borrowing requests



# Overdue borrowing requests

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

# Lending Request



# Overdue Lending requests

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

# Lost items

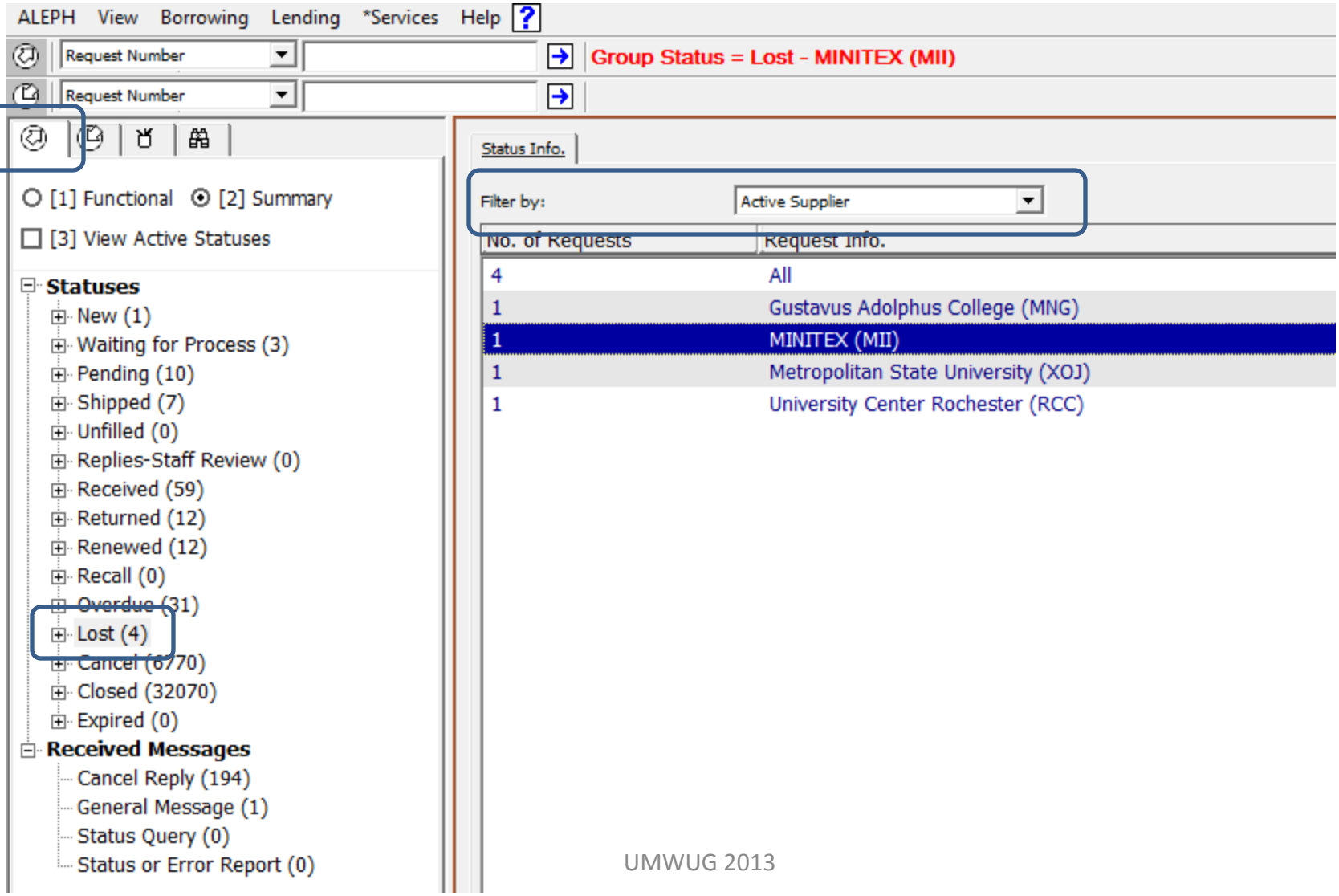
Lender

- Communicate with Borrowing library
- Send bill promptly

Borrower

- Request a bill
- Communicate with Lender
- Prompt resolution

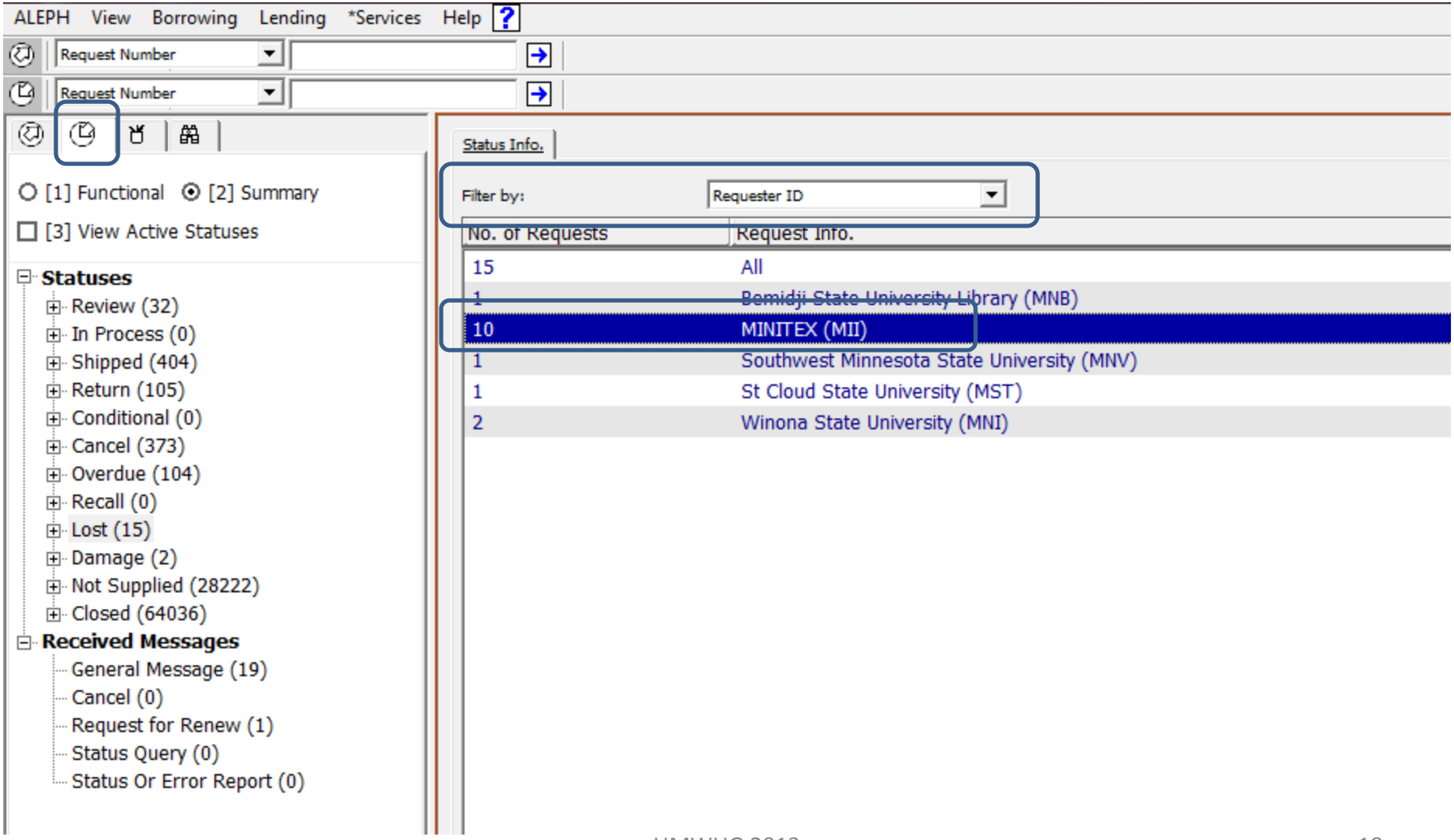
# Borrowing Requests- Lost



# Borrowing Lost

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

# Lending Requests- Lost

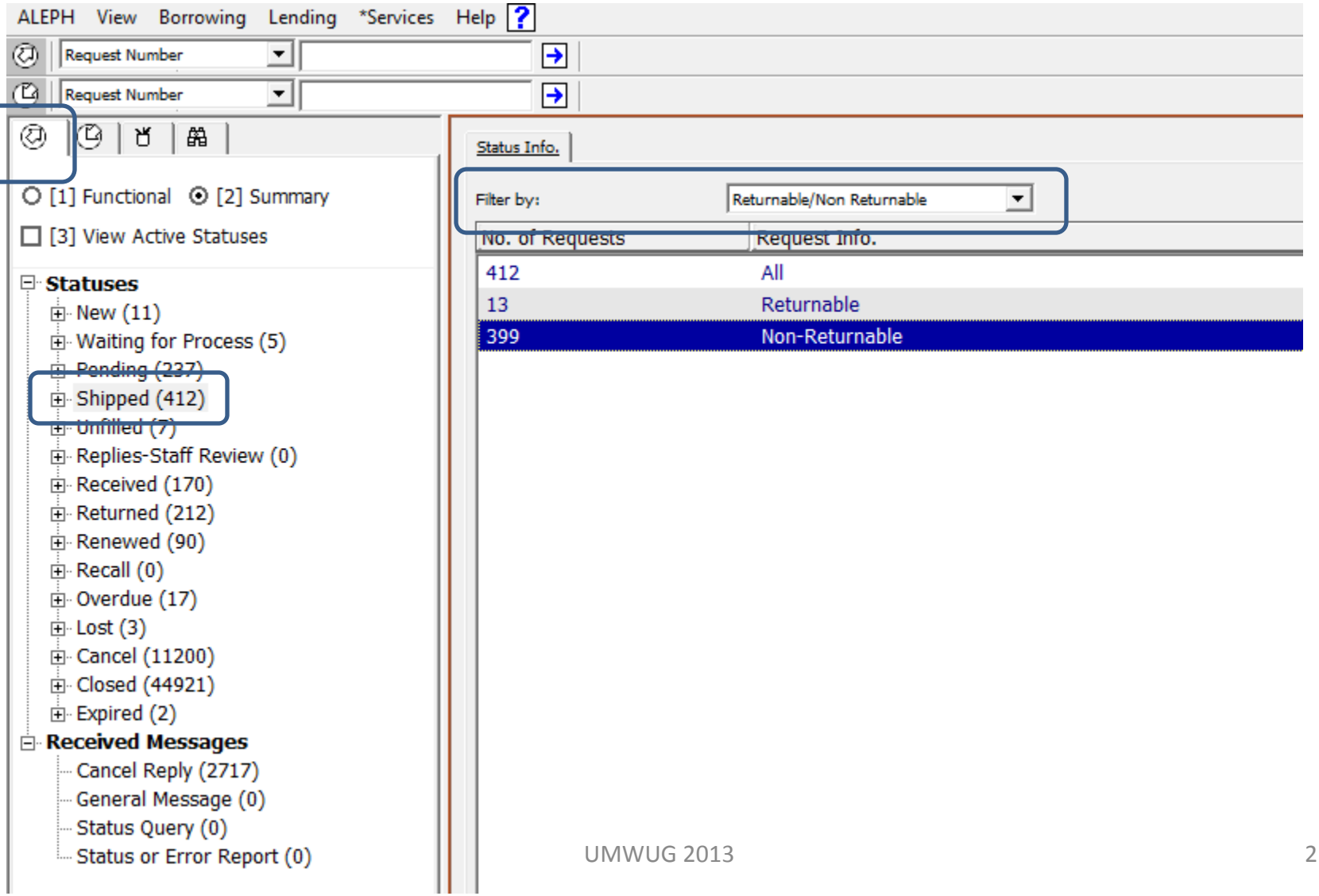


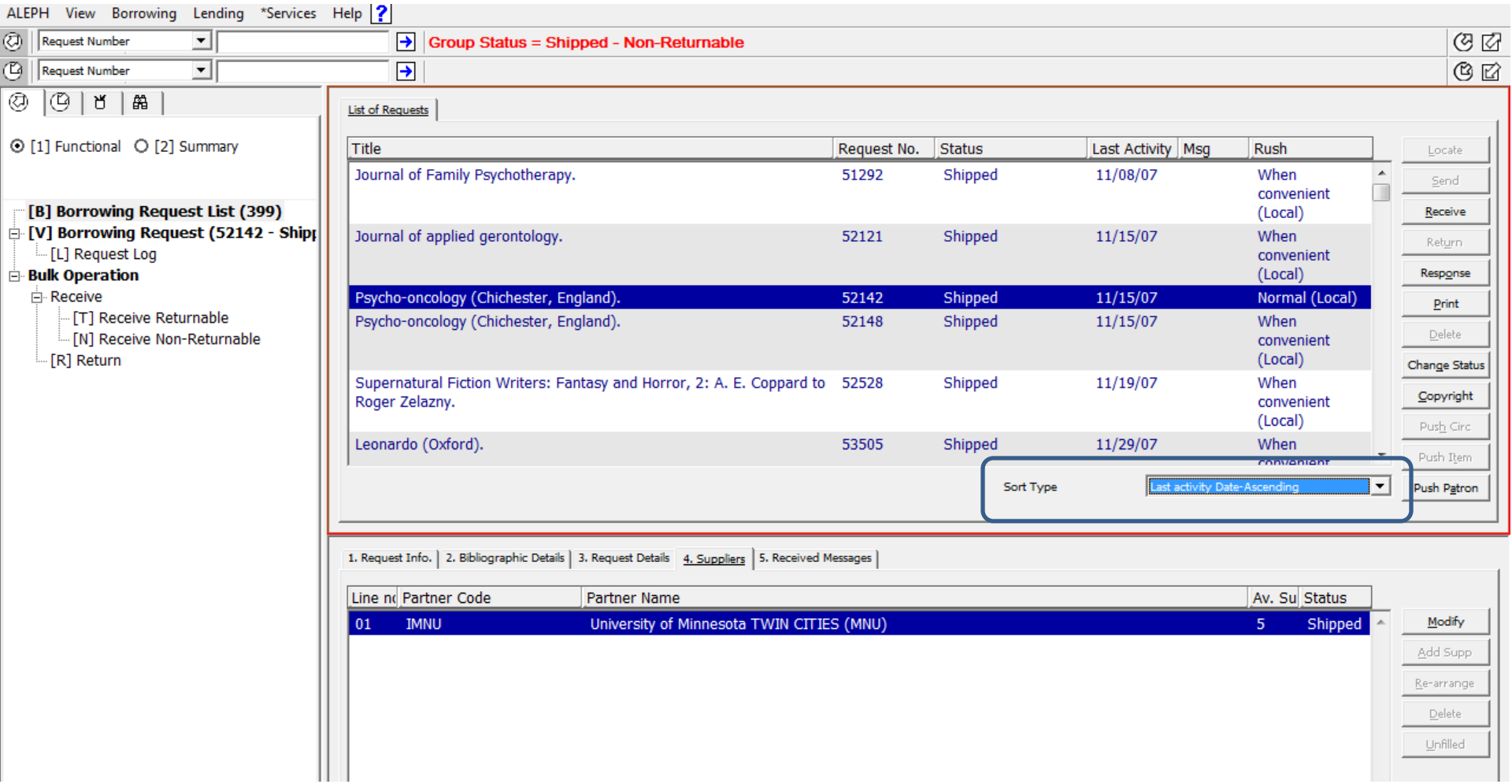
# Lending Lost

- 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


ALEPH View Borrowing Lending *Services Help
Request Number
Request Number
[1] Functional
[2] Summary
[3] View Active Statuses
Statuses
New (11)
Waiting for Process (5)
Pending (237)
Shipped (412)
Unfilled (7)
Replies-Staff Review (0)
Received (170)
Returned (212)
Renewed (90)
Recall (0)
Overdue (17)
Lost (3)
Cancel (11200)
Closed (44921)
Expired (2)
Received Messages
Cancel Reply (2717)
General Message (0)
Status Query (0)
Status or Error Report (0)
Status Info.
Filter by:
Returnable/Non Returnable
No. of Requests
Request Info.
412
All
13
Returnable
399
Non-Returnable

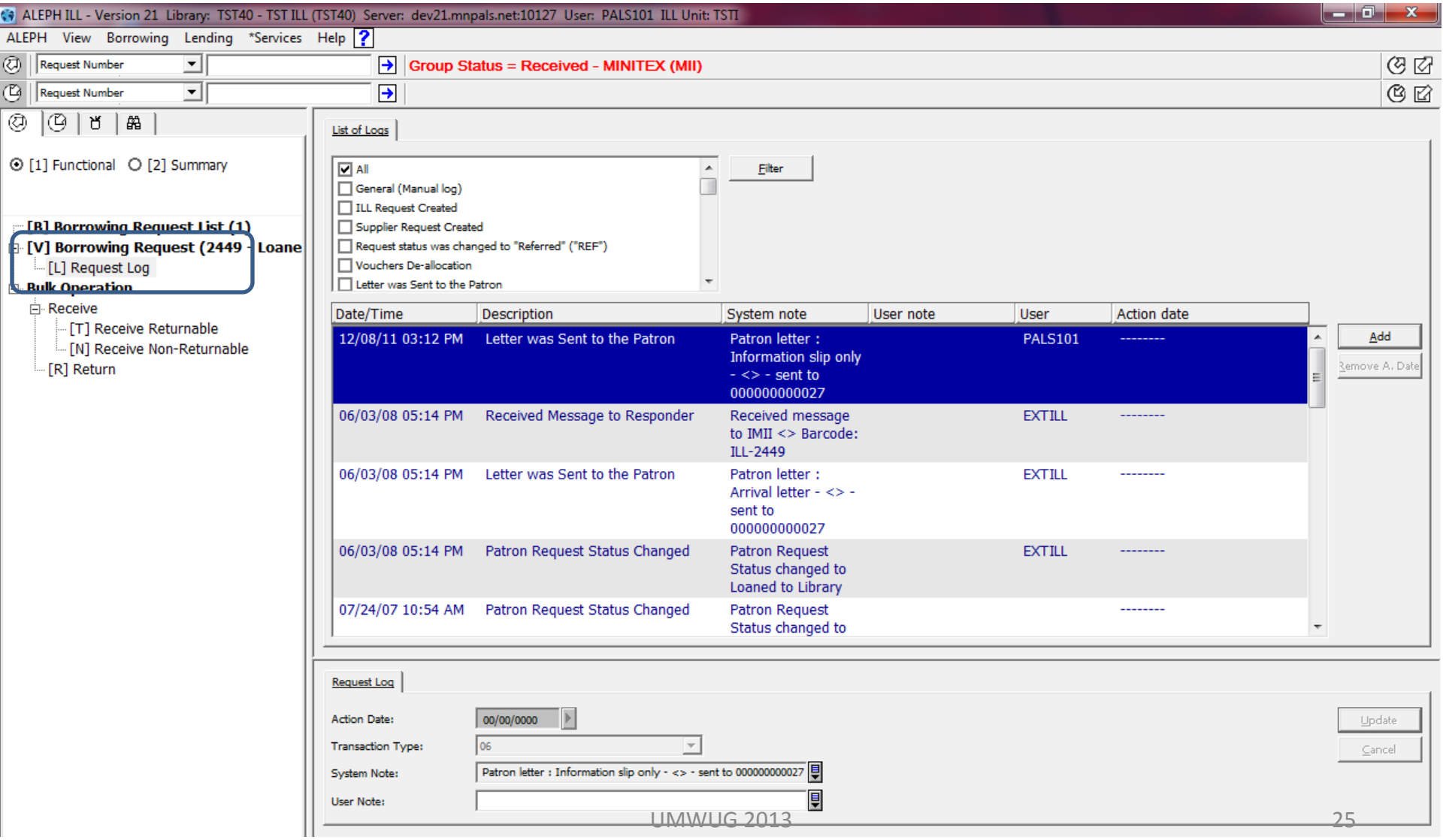

ALEPH View Borrowing Lending *Services Help
Request Number
Request Number
Group Status = Shipped - Non-Returnable
[1] Functional [2] Summary
[B] Borrowing Request List (399)
[V] Borrowing Request (52142 - Shipp
[L] Request Log
Bulk Operation
Receive
[T] Receive Returnable
[N] Receive Non-Returnable
[R] 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
Sort Type
Last activity Date-Ascending
Locate
Send
Receive
Return
Response
Print
Delete
Change Status
Copyright
Push Circ
Push Item
Push Patron
1. Request Info.
2. Bibliographic Details
3. Request Details
4. Suppliers
5. Received Messages
Line nc
Partner Code
Partner Name
Av. Su
Status
01
IMNU
University of Minnesota TWIN CITIES (MNU)
5
Shipped
Modify
Add Supp
Re-arrange
Delete
Unfilled

- 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)
[1] Functional [2] Summary
[B] Borrowing Request List (1)
[V] Borrowing Request (2449 - Loane
[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

# 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

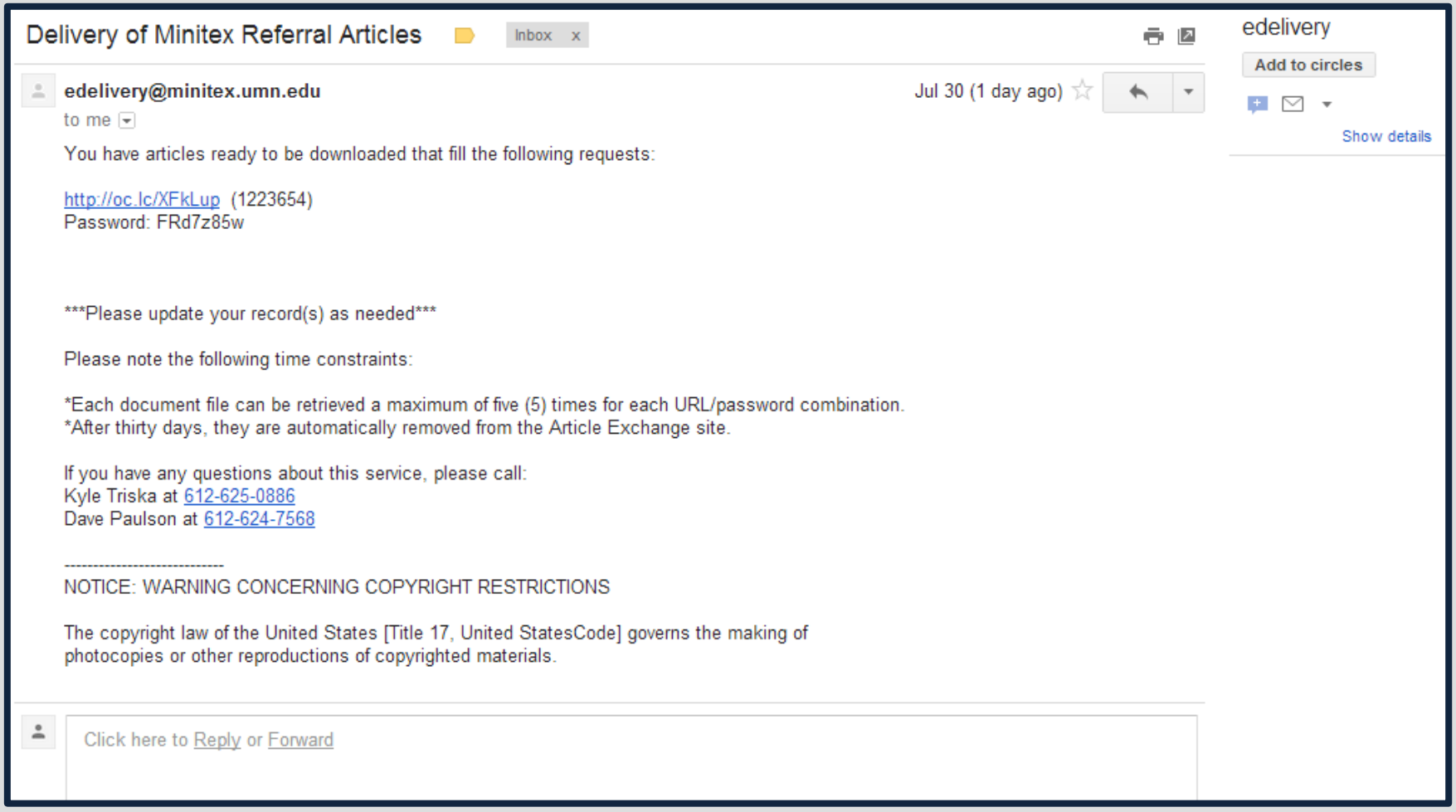
# Deadline Dates

- 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 18th-everyone

# Questions

# Minitex Article Exchange Delivery

## Copy Password and Go to URL



Delivery of Minitex Referral Articles

Inbox x

edelivery

Add to circles

Show details

**edelivery@minitex.umn.edu**

Jul 30 (1 day ago)

to me

You have articles ready to be downloaded that fill the following requests:

http://oc.lc/XFkLup (1223654)
Password: FRd7z85w

***Please update your record(s) as needed***

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.

If you have any questions about this service, please call:
Kyle Triska at 612-625-0886
Dave Paulson at 612-624-7568

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NOTICE: WARNING CONCERNING COPYRIGHT RESTRICTIONS

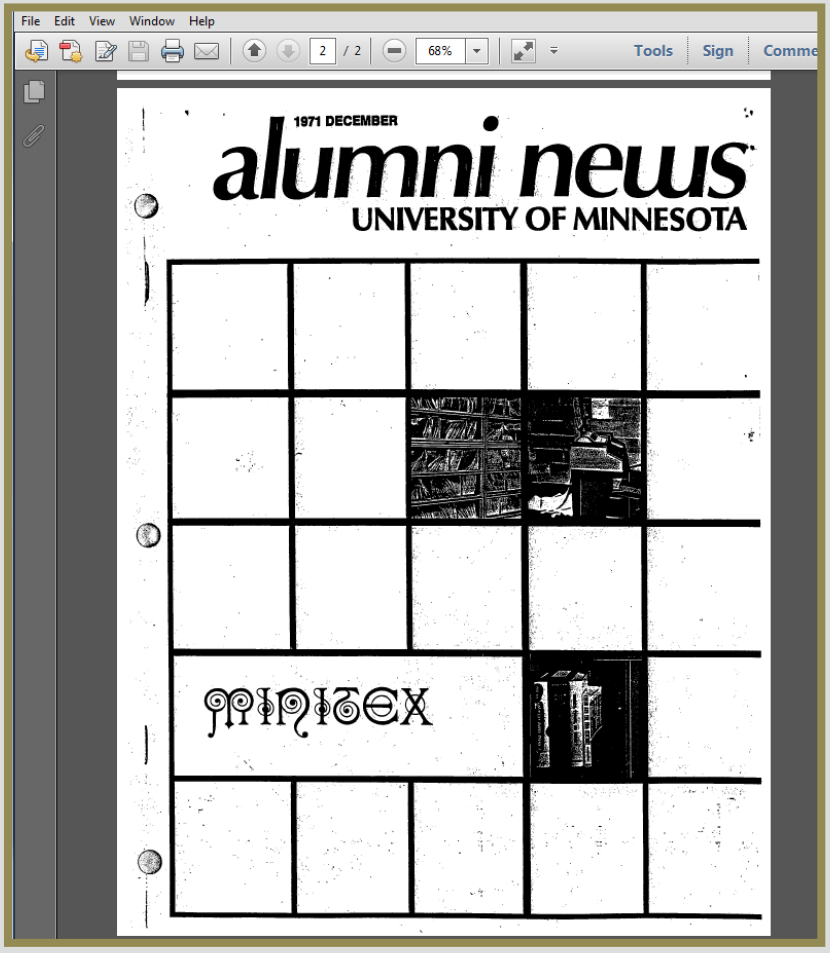
The copyright law of the United States [Title 17, United StatesCode] governs the making of photocopies or other reproductions of copyrighted materials.

Click here to Reply or Forward

# Enter or Paste Password

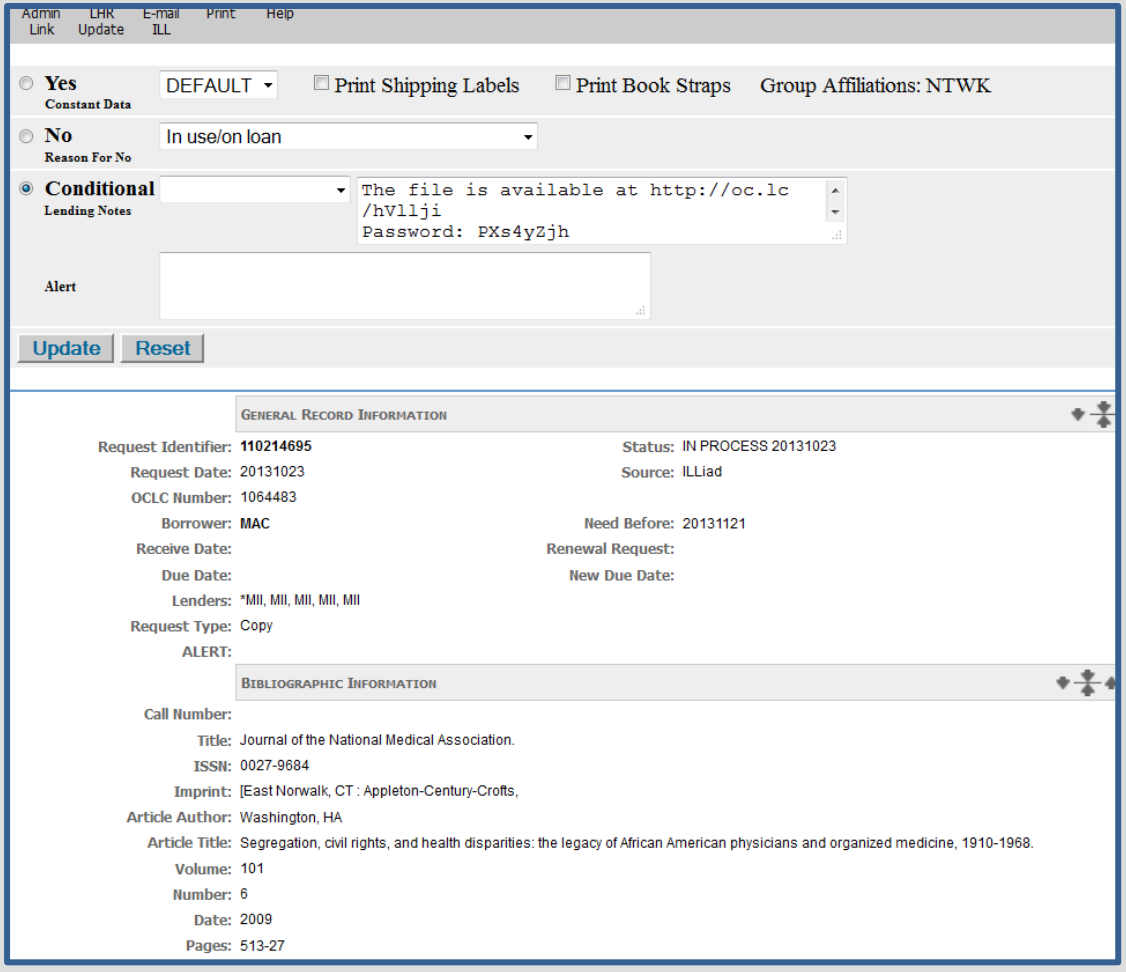
## Click “Get My File”

# 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.



# 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