# Librarian's Guide

## *f*ILL Interlibrary Loan Management System

June, 2016

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## FILL-OSOPHY

For the last decade, Manitoba public libraries have been using a PLSB-developed resource discovery tool ("Maplin") to find Interlibrary Loan sources within the Manitoba public library community. The earliest version of Maplin was simply a union catalogue; as technology progressed and individual libraries' ILS systems gained Z39.50 server capabilities, Maplin became a Z39.50-based "distributed virtual union catalogue" - a single front-end which can find titles in any Manitoba public library and initiate an ILL request, via email.

This has worked well enough for resource discovery, but - as confirmed by a recent PLSB survey on ILL procedures - has led to each library (and sometimes each branch) developing their own procedures and workflows for handling the rest of the ILL life cycle. These run the gamut from custom-developed database systems to paper files; there is little consistency in procedures, the tracking of statistics is error-prone, and workloads can be heavy. One of Manitoba's unique challenges is balancing the capabilities of various ILS systems in the province to realize an effective discovery layer.

PLSB has developed the next evolution of Maplin - fILL - which incorporates full ILL life cycle management, following the structure set out in ISO 10161 (Interlibrary Loan Application Protocol Specification). This application, like Maplin-3, is a centrally-hosted system that requires nothing more than a Javascript-enabled web browser to use.

A key element in the design of fILL is simplicity. We want to make things as easy as possible on the beleaguered ILL staff of the libraries. All of the common functions necessary for dealing with the life cycle of an interlibrary loan - shipping, receiving, marking as unfilled, returning, requesting extensions, and finally marking an item as checked-in - can be done with a simple mouse click. Pull lists are sorted in call # order by default. Active or historical requests can be looked up by patron barcode, borrowing or lending library, title or author, date, or the status of the request. Requests can be easily (eventually automatically) forwarded to the next available source if a given library cannot fill it.

A second key element is adaptability. The system should be able fit relatively seamlessly into most existing workflows. And though most benefit will come from fully using fILL to manage all aspects of ILL, the system is not be dependent on every library fully participating.

The third key element is extensibility. The fILL prototype implements a subset of the ISO 10161 transactions; as need arises, this can be fleshed out to include more of the ISO standard. The system itself is Linux-based, uses common FOSS subsystems (Apache, PostgreSQL, the YAZ Z39.50 toolkit from Index Data), and is written in Perl and Javascript / jQuery. Because it is designed around the standard message types from ISO 10161, it should be relatively easy to have fILL emit and consume protocol messages to easily interact with any existing ILL management system that a library may have in place.

Our vision is smoother workflows, better statistics, reduced work load for the libraries, and an Interlibrary Loan system more responsive to the needs of our ultimate clients, the patrons.

# FILL 2016-06 RELEASE NOTES

## NEW FEATURES

At-a-glance. The Home page now shows the areas in fILL where requests may need your attention. You can click on the link to be taken directly to the page you need to look at.
Search timer. We put a time limit on waiting for search results. Searches now finish when either the timer runs out (45 seconds), or all zServers have responded. This is on both the library and public sides.
Internal notes. You can now add notes to a particular request (as a lender) or request group (as a borrower). These notes are for your own use, and are not seen by other libraries. The notes follow the requests through the request life cycle, so they'll show up on every page, right underneath the request. You can choose to enable or disable these notes from your Account > Other settings page.
Set the rows-per-page globally. You can set how many rows you'd like the fILL tables to display from your Account > Other settings page.

## MAJOR UPDATES

The Borrowing > Renewals page is now split into four tabs:
Ask for renewal – these are all the items you have from other libraries, and which you can ask for renewals on.
Waiting for answer – items you've asked for a renewal on, but haven't yet heard back.
Renewed – renewal requests where the lender said "ok"
Could not renew – renewal requests where the lender needs the item back.
Sort tables on multiple columns. Click on the heading of the first column to sort on, and then shift-click on other columns to include them in the sort.
Printing / Copying / Save-as-Excel / Save-as-PDF now take advantage of HTML5 abilities, and do not require Flash any longer.

## MINOR UPDATES

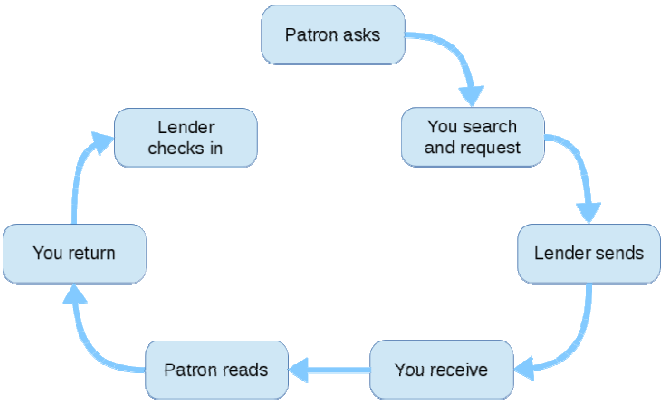
Some eLM titles have a media type of “online resource” rather than “electronicresource”; these now give patrons a link to eLM just like the others.
Items that have been marked as Lost no longer show up in the Overdue list.
Some libraries have changed the way that patrons authenticate; fILL has been updated to reflect this. ***(Recent-version L4U API authentication)***
For Spruce libraries, new patron requests will now let you know if there are Spruce sources so you can request directly within Evergreen.
The Lending > Renewal requests table now shows the original due dates for items that borrowers would like you to renew.
You can now individually set the new due dates when answering a renewal request.

## BUG FIXES

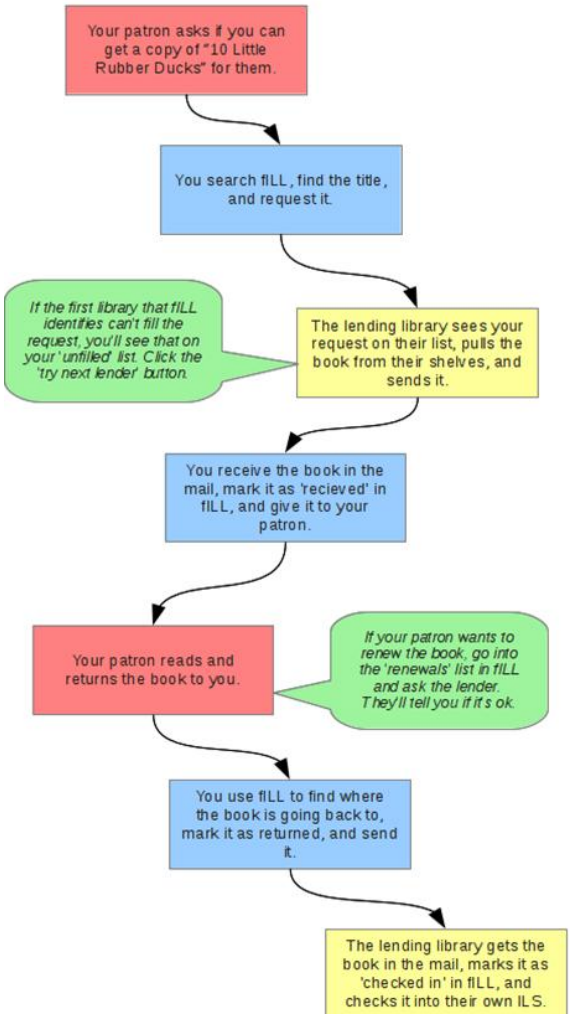
Before trying the next lender, fILL will verify that the current lender has not responded. This fixes the bug where one request ended up going to two libraries….
Some unfilled requests with no further sources were not being displayed properly; this has been fixed.
Searches which included commas were giving some zServers fits, so commas are now removed from the search text.
Search results record view / target view bug has been fixed.

## ILL LIFE-CYCLE MANAGEMENT

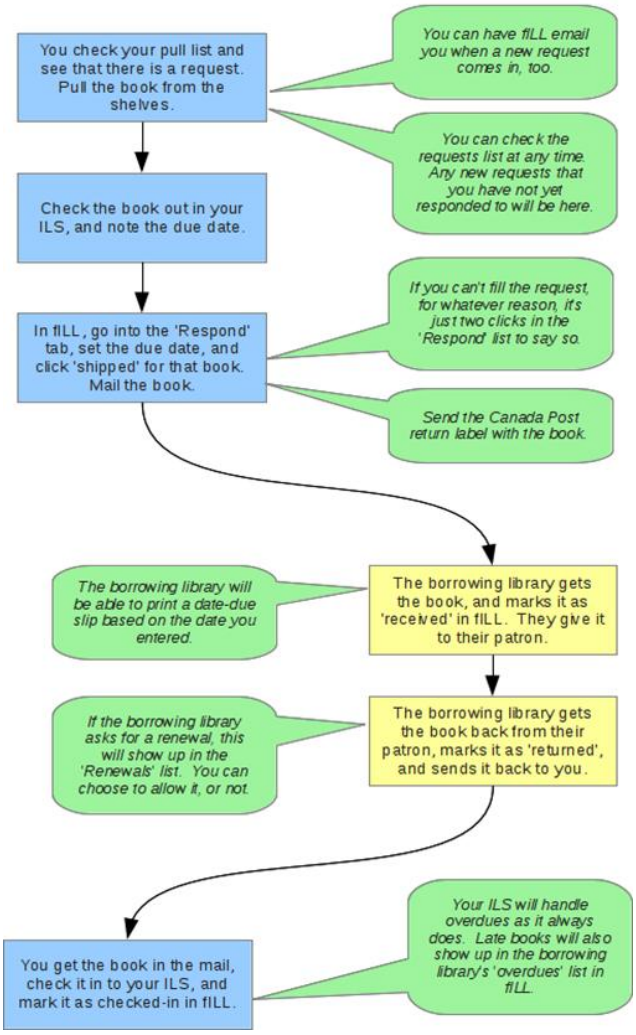
fILL simplifies the management of your interlibrary loans by tracking each request through each stage, with only a mouse-click or two from the lender and the borrower at each stage.




### Borrowing a book from another library



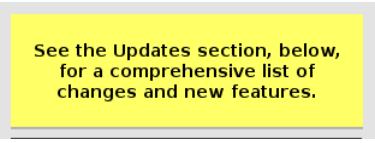

### Lending a book to another library



# HOME

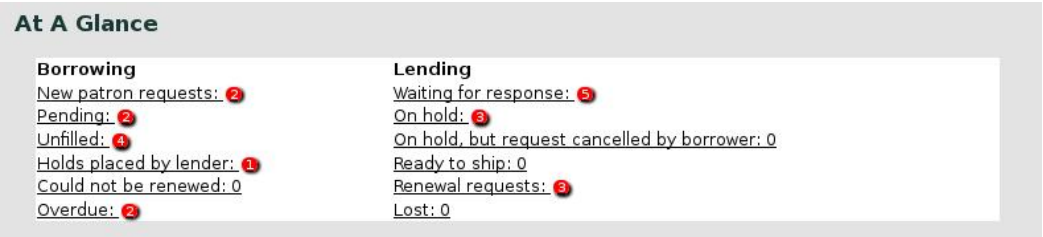
The Home tab gives you a way to quickly look at important information. It has the following five sections:

## IMPORTANT NOTES




Take a quick look at this when you log in – we'll put any breaking-news here first (for instance, if the Canada Post shipping tool goes down, or fILL itself is experiencing problems).

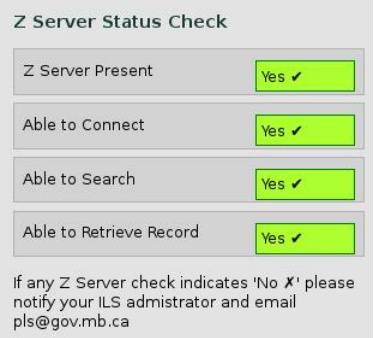
## AT A GLANCE




From here you can see any Borrowing or Lending tabs which may need your attention. The red-circled numbers indicate (just like with the menu tabs themselves) the number of requests in that tab which are waiting for your action.

You can click on the underlined links to get directly to the tabs.

## Z SERVER STATUS CHECK




The zServer status check lets you know if fILL is able to search your system.

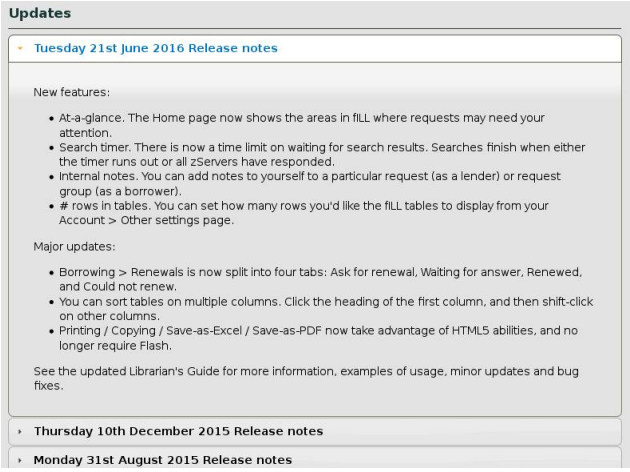
All four tests should be green, saying "Yes".

If any of the tests fails (red, saying "No"), you'll need to contact your ILS administrator and/or Public Library Services.

## UPDATES

This lets you see the major changes to fILL during the regular upgrade cycle, or any very important bug fixes outside of the regular cycle.

You can click on a heading to expand that section, and look back at how fILL has evolved.




## QUICK LINKS

We keep a list of useful fILL links and documents here.

Everything in this list is a link you can click on to either leave fILL and go to a new site, or to download a document.

We will update this as we create new documentation.

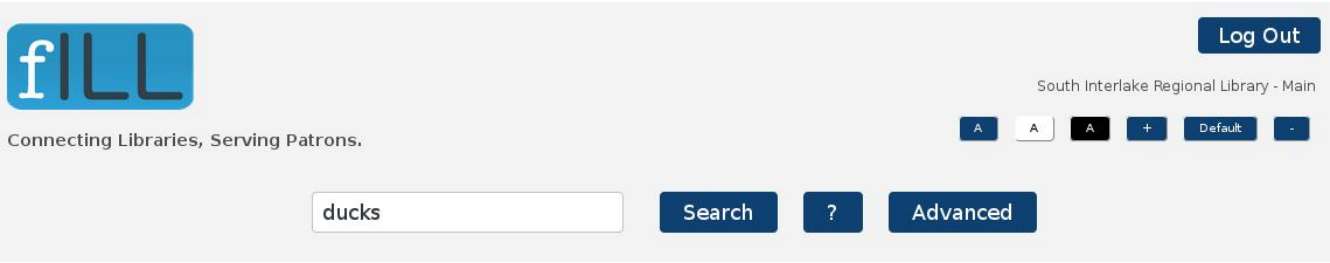
# BORROWING

Borrowing and Lending are the two sides of interlibrary loan, so fILL splits them up into their own sections.

Everything to do with your library borrowing material from other libraries is collected under the Borrowing tab.

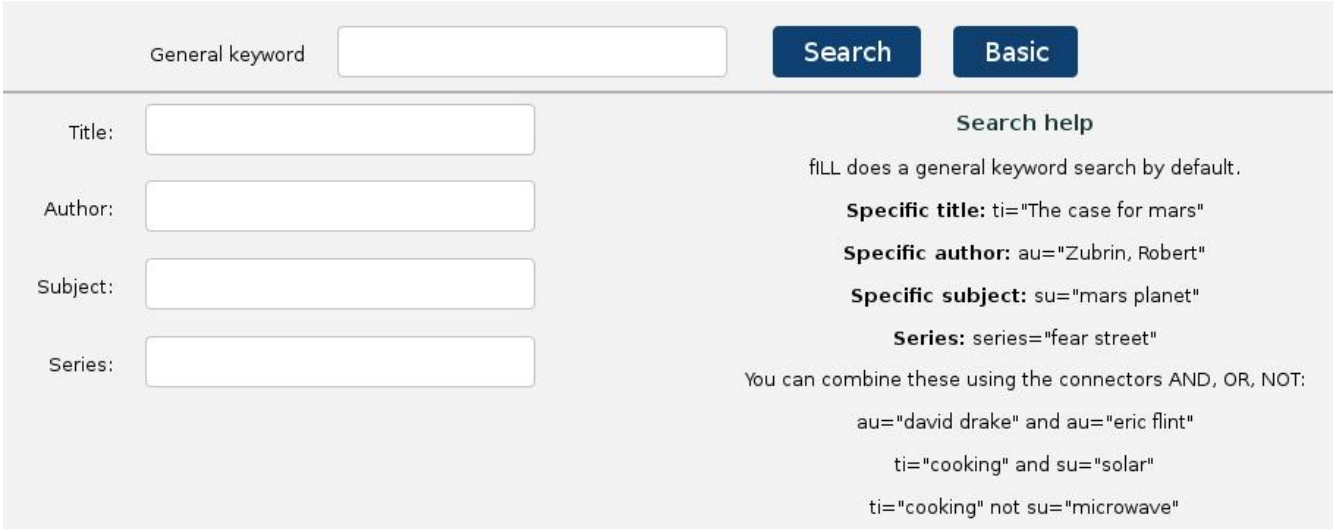
## SEARCH

### SEARCH BAR




You'll only see the search bar when you are in the "Borrowing" -> "Search" area. It's up at the top so it doesn't take valuable screen real estate from the search results.

Clicking the "Advanced" button will open a space to enter a specific title, author, subject or series:

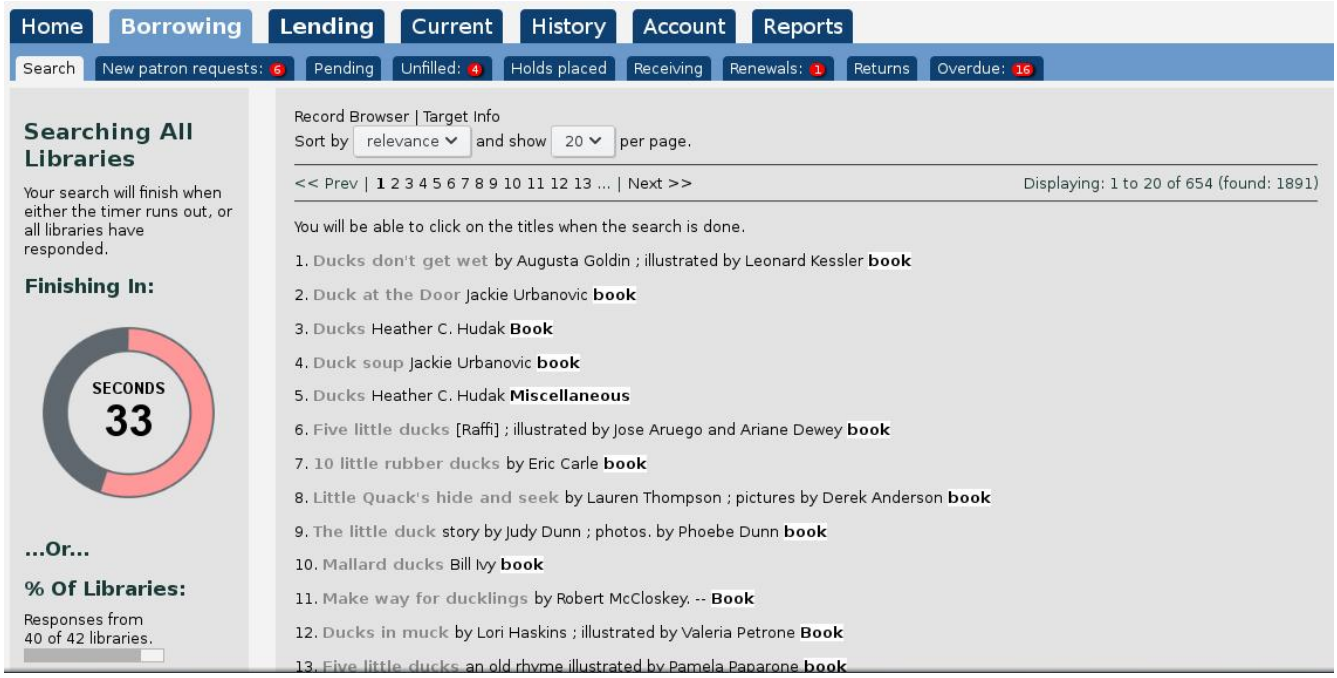



(You can also follow the examples in the "Search help" on the right to do title/author/series/etc searches directly from the basic search bar.

In general, though, you'll probably want to stick to the keyword search (it is not dependent on particular cataloguing practices of the various libraries, nor the capabilities of individual z39.50 servers).

If you only enter a few keywords, you'll get a long list of results... but you can always shorten that by refining the search.

## SEARCHING &SEARCH RESULTS




fILL begins displaying results as soon as they start coming in, but you won't be able to make an ILL request until the search is complete.

## SEARCH PROGRESS BAR

fILL sets a time limit (45 seconds) on how long it will wait for libraries to respond to a search.

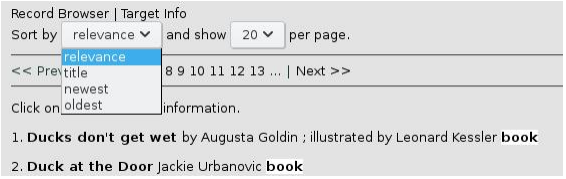
Your search will finish when either:

- The timer runs out, or
- All libraries have responded

...whichever comes first.

## SORTER

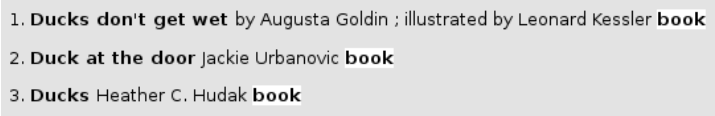
Search results are ordered by relevance. The underlying search technology has a complex relevance-ranking system that looks at the frequency of your search terms and the "importance" of the parts of the MARC record where those terms were found.




You can also sort in title order, or by publication date (ascending or descending).

## RESULTS

Titles in the search results are grouped by format (that is, all copies of the title "Ducks don't get wet" in the "book" format will show up as one entry, all copies of that title in DVD format will show up as another entry).




fILL pulls the media/format type from RDA fields if they're available; otherwise it checks the General Material Designation (245$h) and physical format (007). If none of those are available in the record (and that would be some pretty poor cataloguing), fILL assumes it is a book.

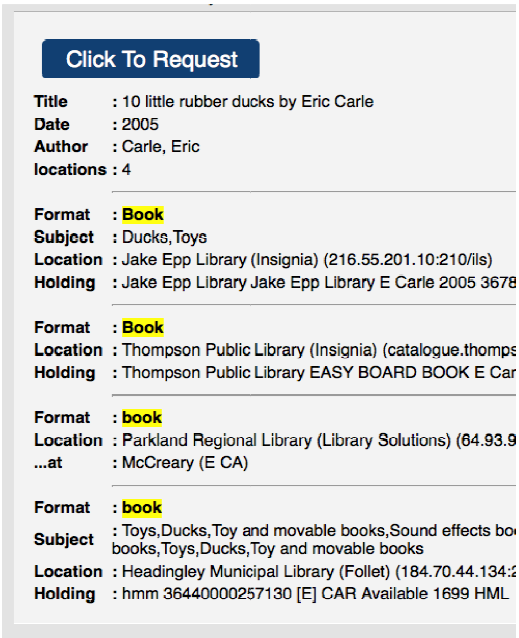
Occasionally you'll see media/format types like "{Paperback}"… this seems to be either a limitation of certain ILS systems, or some too-literal copy cataloguing.

Click on a title in the results list to show a 'Click to Request' button, as well as details about the title.

The top of the information shows the title, publication date, author, and # locations which report having it.

Below that is information specific to each holding library (the 'holding' line may or may not display item availability, depending on what that library's z39.50 server returns).

You just need to click the button in order to make the request – all of the rest is just information if you're curious. (See the section of this guide on Making Requests for more information)



## REFINE

You can refine your search by selecting a term from the column along the left-hand side. These terms are collected from the results as they come in.

Clicking one of the terms will re-do the search with the additional term added.

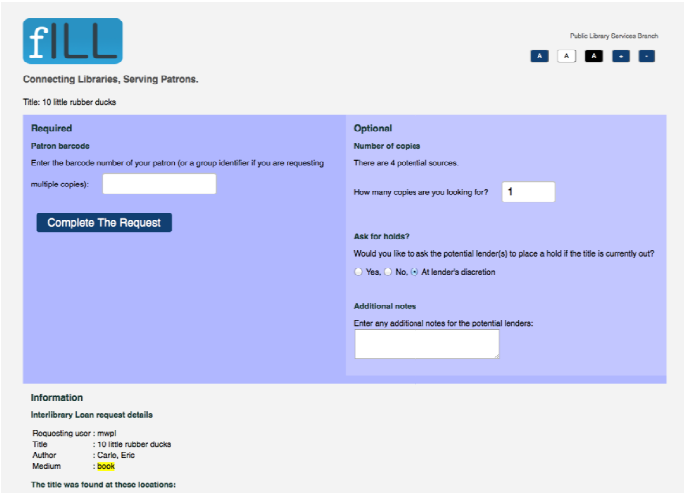
The number in parenthesis after the term shows how many times that term appears in the results.

## REQUESTING AN INTERLIBRARY LOAN

We've already looked at the first steps:

1. Go into “Borrowing” -> “Search”, and do your search.
2. Click on the title in the results list.
3. Click on the request button.

Here's what happens next:




4. **Enter your patron's barcode** (or some other text that will identify, to you, who you are requesting for).
5. (Optional) **Enter the number of copies** you're looking for. This defaults to 1, but you can increase that if (for example) you're requesting multiple copies for a book club.
6. (Optional) **Indicate whether you are asking the lender to place a hold.** “Yes” means you'd like the lender to place a hold (if it fits their policy), “No” means you don't want any holds placed (that is, you'd prefer to just go on to the next possible lender). The default is to leave up to the lender's discretion.
7. (Optional) Enter any **additional notes** that may help the lender.
8. Click the **Complete the Request** button.

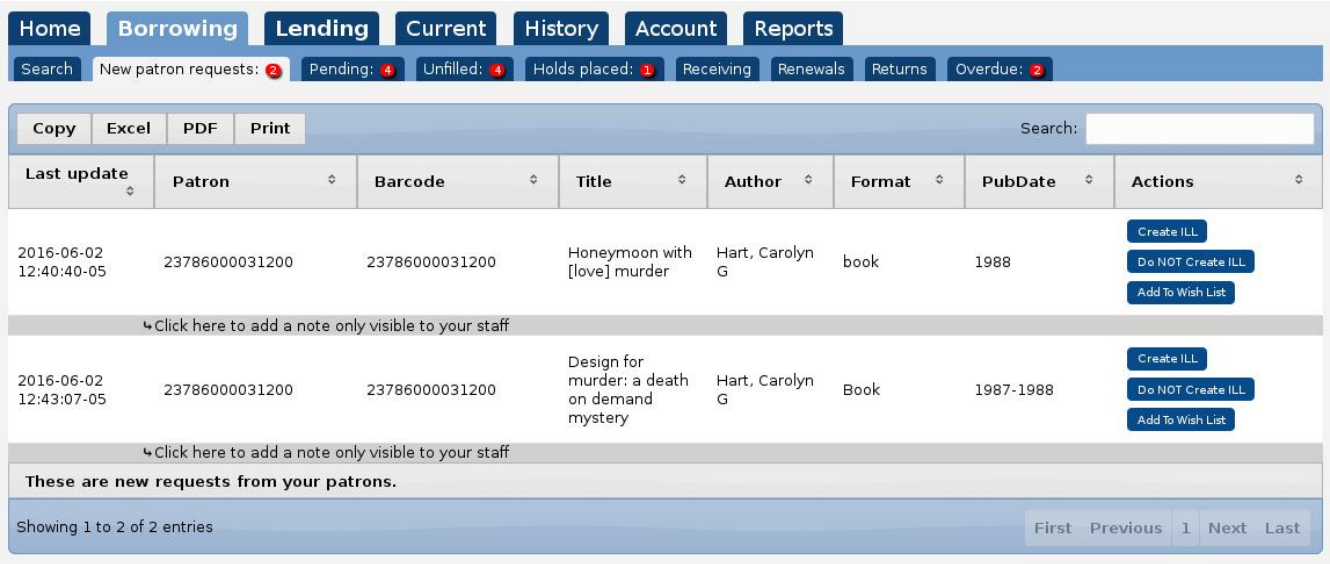
fILL automatically chooses the appropriate lender based on net-borrower/net-lender status, so that the libraries which borrow the most are the first ones that will be asked to lend.

There is an exception to the net-borrower/net-lender rule: if you (as a borrower) are a member of a regional library system, other branches in your system will be asked first.

That's it. You'll see that the request has been placed. (There is a bunch of extra information about the request that was just created… it's mostly just to satisfy your curiosity). You can safely close this browser page, which should leave you back at the search results.

The request is now handled by fILL's ILL life-cycle management.

## NEW PATRON REQUESTS




When your patrons use the public side of fILL to find material they'd like you to get for them, those "pre-requests" show up here.

These are not (yet) ILL requests.

As the patron's home library, you have the option at this point to create the ILL, which sends the request off to the first potential lender. This is exactly as if the patron had called the library and asked you to get a book for them – you would do the search and make the request – except that the patron has saved you some work by doing the search themselves.

You can also choose to NOT create the ILL. You will be presented with a space to give the patron a reason.

Select one of the common reasons, or give the patron a custom message.

Your patron will see this the next time they log in, when they look at their requests.

A third option is to add the information to your "wish list". The patron will get a notification that the title is being considered for acquisition, and no ILL request is created.

You can add an internal note to the "pre-request"; it will be carried over to the actual ILL request if you choose to create the request.

## PENDING

The Pending list shows all of the requests you have made where the *first potential lender* has not yet responded.

The list tells you when the request was placed, and how many days ago that was. It also shows which library the request went to.

The "Trying lender" column will always show "1 of X" – this is the first potential lender – so you can see if there are other libraries that hold the title.

A request will stay with the first lender for 3 days, waiting for a response. This is part of fILL's load-balancing; we want smaller libraries which may not be open every day to have a chance to fill the request, rather than always going to larger libraries with more open hours.

The buttons in the Action column will tell you how long is left to wait, or give you the option to try the next lender. When you try the next lender, the request to the original lender is cancelled and a new request (to the new lender) is created..

If there are no other lenders, your only option is to cancel the request. Take note of the patron barcode so you can contact your patron.

## UNFILLED

When a lender responds to your request with an "unfilled" message (i.e. they are not able to fill your request at this time), that request comes to the Unfilled list.

The "Status" column shows the reason that the lender cannot fill the request. There may be more information in the "Message" column, too.

If there are other sources for the title, you'll see a button to "Try next lender."

If there are no further sources to try, you should cancel the request (and maybe try again in a few months).

The list also shows the publication date of the title. Most libraries won't lend current-year materials (they want their own patrons to have access to it first), so if you have demand for a recent title, consider adding it to your acquisitions wish list.

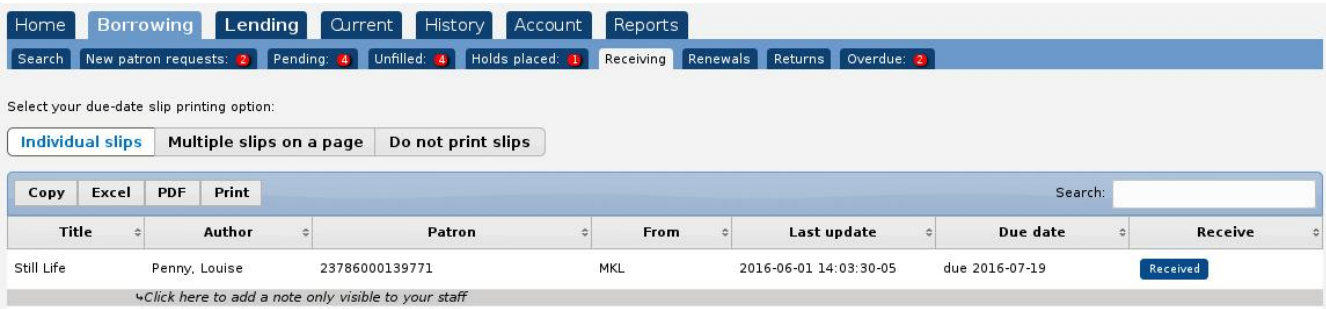
## HOLDS PLACED

When you make a request, you can ask that the lender place a hold on the item for you if it's out. If the lender chooses to place the hold, that request will show up in this list.

The list gives you the date that the lender estimates the item will be available, and also your patron's barcode (so you can let them know).

You can also cancel the request at this point; once the lender has confirmed the cancellation, the request will move to history.

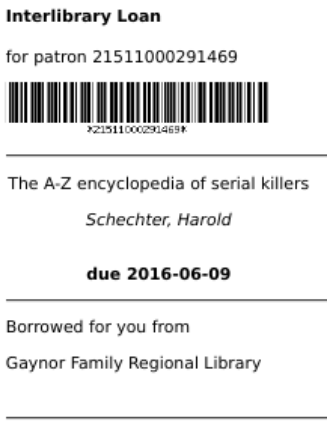
## RECEIVING




Items will appear on this list once the lender marks them as "Shipped." This means that the item is on its way to your library.

When you physically receive the item, come to this page and click the "Received" button.

Most libraries have slip printers / receipt printers… if you have one connected to your network or your computer, you can print a slip which has a scannable patron barcode, and the title, author, and lending library's due date. You can put this in the book and give it to the patron (but remember that the due date is when the lending library wants to have the book back… let your patron know that the book has to go back through the mail, which may take a few days).



If the lender entered a Canada Post tracking number when they shipped the item, you'll also see an option to jump out to the Canada Post package tracking site.

If you don't have a slip printer, you can choose to not print slips at all, or to print them all on one page (if, for example, you wanted to slice the page up and put a slip in each book).

## RENEWALS

For any item that you have Received (that is, it now appears on the Returns list, waiting to be returned to the lending library), you have the option of asking for a renewal of the loan.

There are four distinct categories of renewal-related requests:

### ASK FOR RENEWAL

This is a list of all of the items your library has borrowed from other libraries, and which are still (potentially) open for renewal. (As a courtesy to lenders, fILL will only let you ask for one renewal per item).

To ask for a renewal, find the title in this list and click the "Ask for renewal" button. The status will change from "Received" to "Renew", but the item will stay on this list until the next time you refresh the page (or go to another fILL tab and come back here)… then you'll see the renewal-request on the "Waiting for answer" list.

### WAITING FOR ANSWER

Here you will find any renewal requests you've made, where the lender hasn't yet replied.

You can cancel the renewal request, which will put the item back on the Returns list (and, after a page refresh, also back on the list of items you can ask for a renewal on).

## RENEWED

When a lender authorizes a renewal, that request shows up here, with the new due date.

## COULD NOT RENEW

If the lender could not give you a renewal (e.g. they have another hold on the item), it will be listed here. The lender may have attached a message to this, which you'll see in the "Message" column.

It is important that items which could not be renewed get returned to the lender quickly – which is why the red-circled number on the Renewals tab refers to the number of items in *this* list.

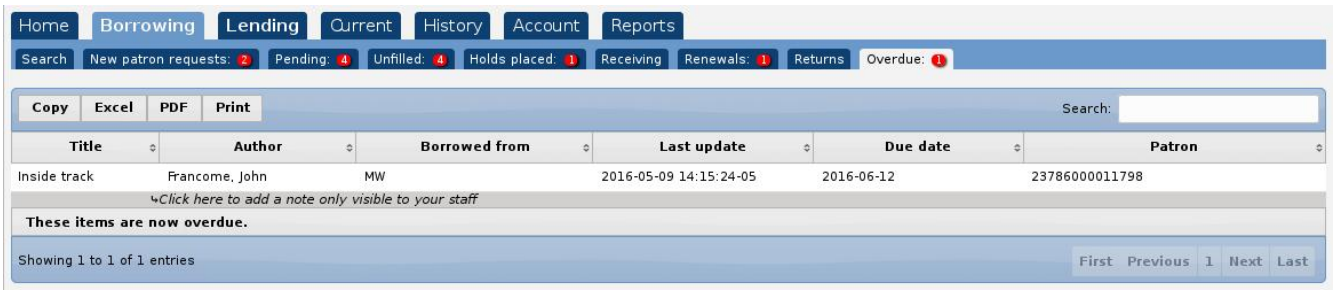
## RETURNS

“Returns” is a list of all items currently borrowed from other libraries (they’ve shipped it and you’ve received it).

When your patron returns the item to you and you’re ready to return it to the lending library, come here to mark the item as returned.

You should have a Canada Post return label from when the item was shipped to you. If you enter the Canada Post tracking number here (before clicking the “Return” button), then the lender will be able to track the package.

## OVERDUE




Libraries who have loaned to you may all handle overdues in different ways. You may get phone calls or emails from their staff, or their ILS may automatically send you email (or even SMS/text message) reminders.

The lender’s preferred method of contacting you, of course, takes precedence.

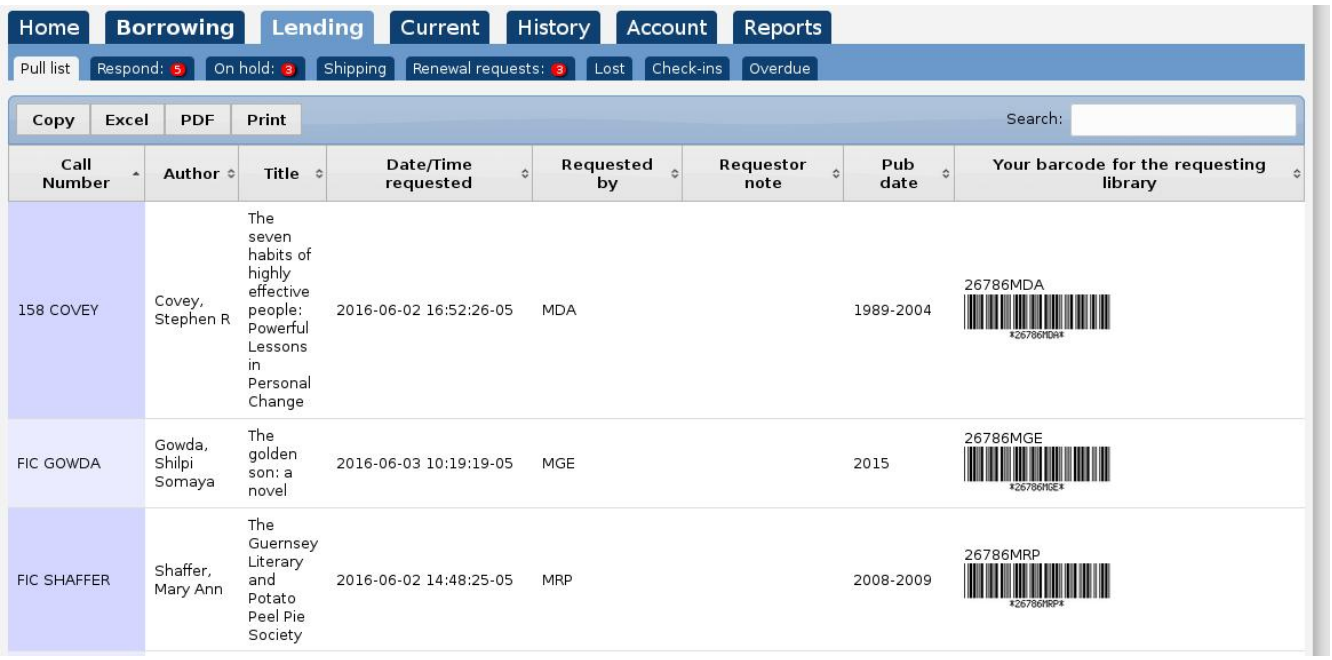
This list is just for your convenience. It lists all of the items currently out to your patrons which have exceeded the due date the lender specified. It includes the patron’s barcode, so you can look them up in your ILS and get in touch with them.

Items will remain on this list until you’ve marked them as Returned and the lender has marked them as Checked-in.

## LENDING

Everything to do with your library lending material to other libraries is collected under the Lending tab.

### PULL LIST



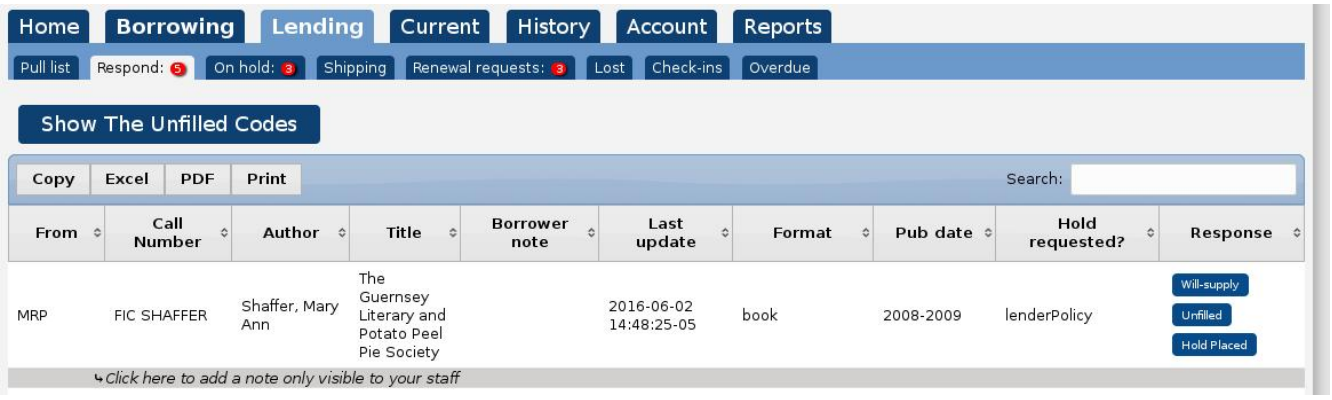

When you go to Lending, the first thing you'll see is the Pull List. The Pull List is a list of all new lending requests (i.e. requests that you haven't responded to yet).

In a typical workflow, you would print the pull list and take it to the stacks to pull items in order to fill requests. The list is sorted in call number order to make this easier.

You are not obligated to fill every request. For example, most libraries won't lend new material; the pull list includes the item's publication date to help you decide.

If you have set up the other libraries as patrons in your ILS and have entered their barcodes in fILL, the pull list will have print them as scannable barcodes. With the book in hand, you'll be able to (in your ILS checkout) scan the patron barcode from the pull list and the book barcode from the book.

## RESPOND




New requests to lend appear here (and on the Pull List).

There are three ways to handle a new request: you can supply the item ("Will-supply"), decline to fill the request ("Unfilled"), or place a hold (in your ILS) and fill the request later ("Hold placed"). Once the request has been handled it will be removed from this list.

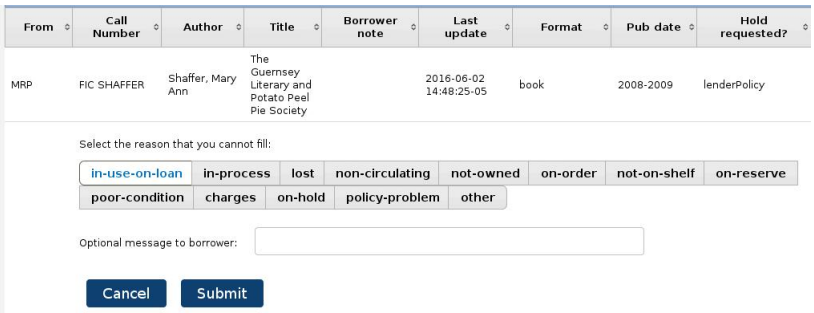
## WILL-SUPPLY

Clicking the Will-supply button will move the request to the Shipping tab, waiting to be sent out.

## UNFILLED

You can choose to NOT fill the request, by clicking the Unfilled button.

This will open a space for you to indicate the reason you can't fill the request (the list of reasons is taken from the international standard for interlibrary loans, ISO-10161).

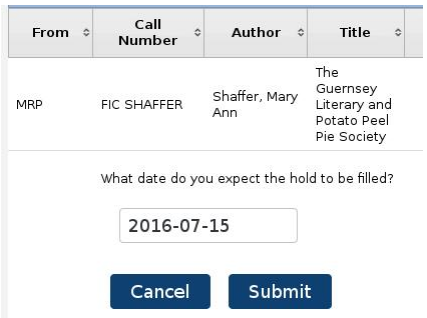



Select the reason (the borrower will see this), and optionally give a custom message back to the borrower.

Clicking Submit will send the "unfilled" response; clicking Cancel will return you to the Respond list without making any changes.

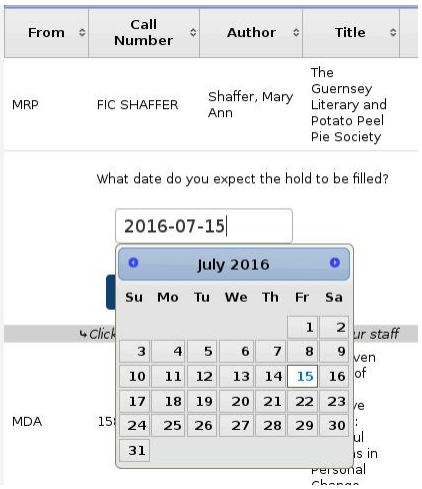
## HOLD PLACED

If the item is currently out to one of your patrons, you can choose to place a hold on it in your ILS for the borrowing library.




If you place a hold in your ILS, mark the request in fILL as “Hold placed”.

This will open a space for you to indicate when you expect the hold to be filled (that is, when the book should be back from your patron, and you expect to be able to fill the ILL request).



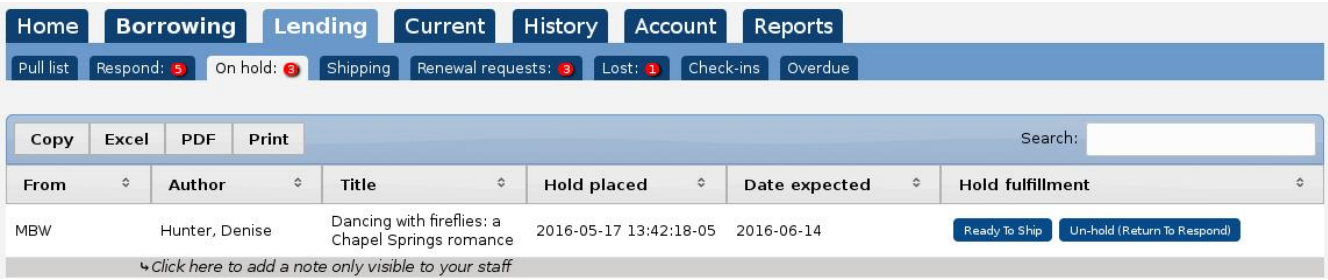

Clicking the date will let you select a new date from a calendar.

## THE UNFILLED CODES

| | |
|---|---|
| in-use /on-loan | Currently checked out to a patron. |
| in-process | Not ready for loan. |
| lost | Item has been declared missing. |
| not-owned | Our catalogue lies. We should fix that. |
| on-order | We're going to buy it. |
| not-on-shelf | We've... misplaced it. |
| on-reserve | Too new, or circ limited to specific group. |
| poor- condition | How did that get back on the shelf? |
| charges | There would be a fee - email us to ask. |
| on-hold | There are local holds on this. |
| policy-problem | It is against our policies to loan this. |
| other | Any other reason. |

Clicking the “Show the Unfilled codes” button will open a table which gives a quick explanation of what each of the ISO-10161 Unfilled codes means.

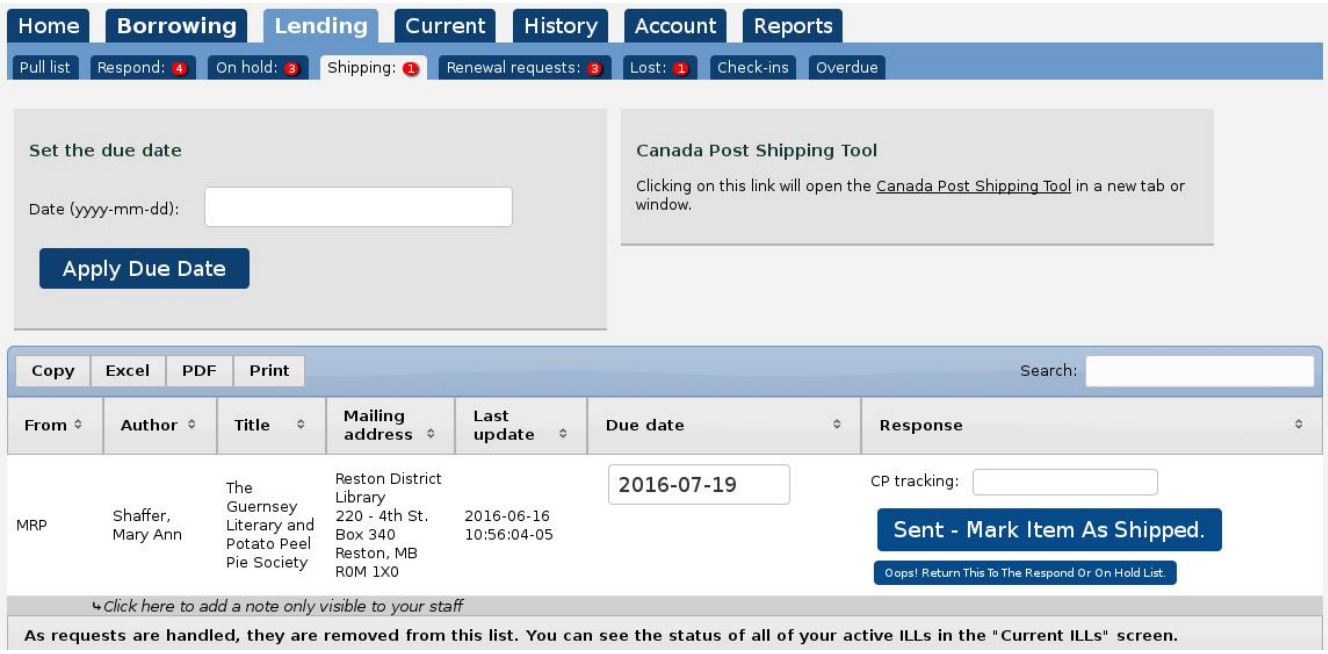
## ON HOLD




Any requests that you have responded to with “Hold placed” will show up here. Once you have the book back from your patron and are able to fill the request, click the “Ready to ship” button to move the request to the Shipping page.

If for whatever reason you cannot fill the request after placing a hold, you can un-hold it. That will return the request to the Respond list where you can mark it as “unfilled”.

## SHIPPING

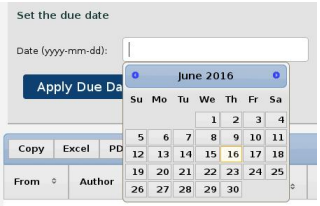



When you’re ready to send items out to the borrowing libraries, come to the Shipping screen. This will list all requests that you’ve responded to with “Will-supply” (or items you’ve placed on hold that are now ready for shipping).

You can set the due date individually for each request by clicking in the “Due date” box for that row.

You can also set the due date for all of the items by clicking in the Date field in the upper left. You’ll see a calendar which will let you pick a date. Generally, you’ll want to set this to the date that your ILS indicated

when you checked the item out to the borrowing library, but you may want to set it a couple of days earlier to account for transit time.



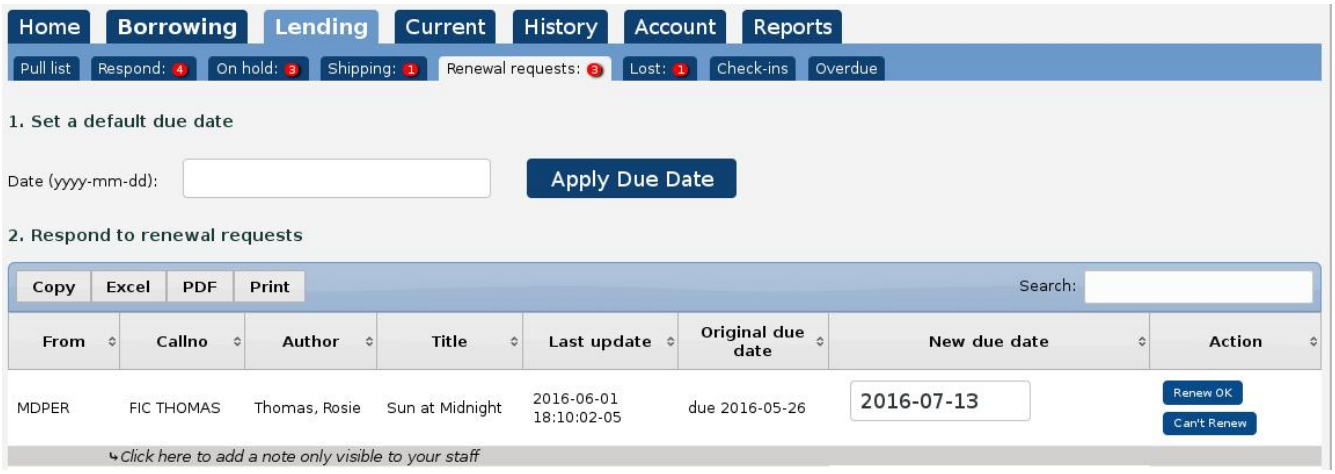

If you have different material types (e.g. some books and some DVDs) which have different loan periods, set the default due date for one type and mark all of those as "Shipped", and then change the default due date and mark the rest as "Shipped."

There is a link out to the Canada Post Shipping Tool for your convenience.

Before marking an item as Shipped, you can enter the Canada Post tracking number from the mailing label. This will let you track the item in transit.

You can also click the "Oops!" button to send a request back to either the Respond or On Hold list, wherever it came to here from.

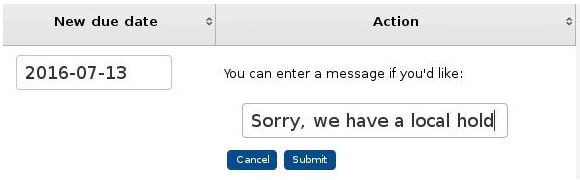
## RENEWAL REQUESTS



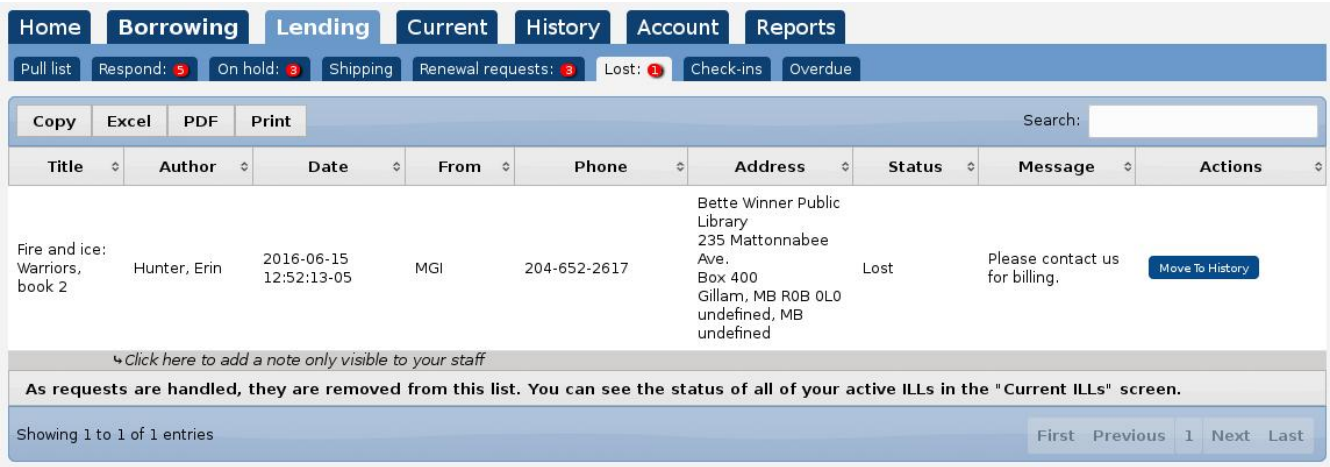

Occasionally a borrowing library may ask for a renewal or extension of a loan. These renewal-requests are collected here.

You have the option of either setting a new due date and saying "Ok" to the renewal request, or not renewing the loan.

If you say "Can't renew", you can add a personal message to the borrower (e.g. "Sorry, we have a local hold."). Clicking the Submit button sends both the "cannot-renew" message and your personal message. Clicking the Cancel button leaves the renewal request, unchanged, on this list.



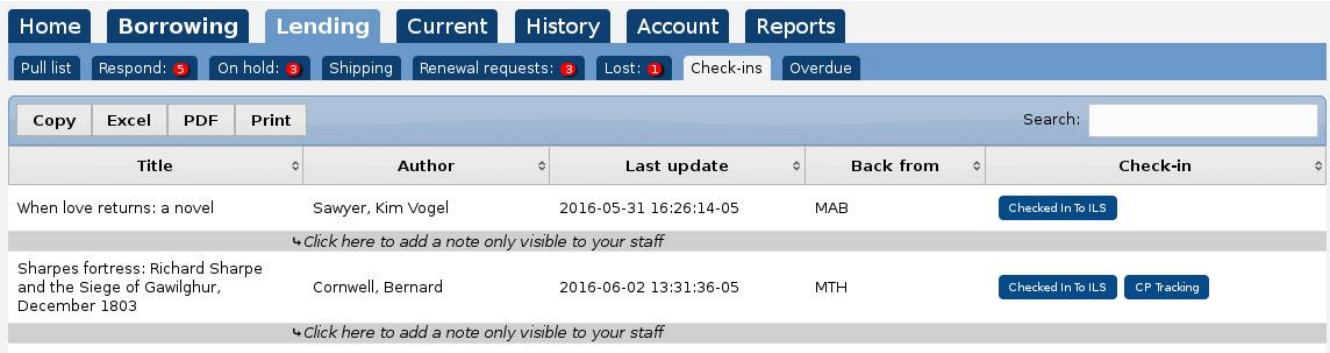
## LOST




If a borrowing library indicates that an item you've loaned them is lost, the item/loan information will be added to this list.

When you've finished handling the issue (sending them a bill, etc), close the ILL transaction by clicking the "Move to history" button. Once it has been moved to history, you can always go to the History tab to find it again (e.g. by using the table search to just show requests with lost items).

## CHECK-INS

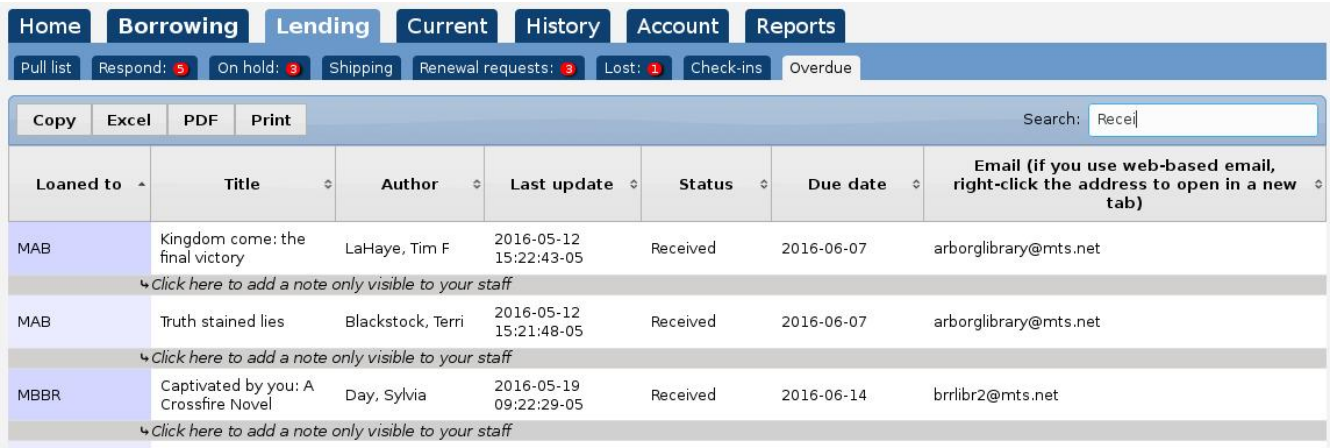



When a borrowing library is finished with your loaned item and marks it as "returned" (the borrower's equivalent to the lender's "shipped"), you'll see it here.

If the borrowing library entered the Canada Post tracking number from the return label, there will be a "CP Tracking" button which will take you out to the Canada Post package tracking site.

Once the item has arrived back at your library, mark it as "Checked in to ILS" (and then actually check it in to your ILS). Marking it as checked-in here will close the request and move it to history.

## OVERDUE




Your ILS will handle overdues in whatever way you've set it up to; from the ILS point of view, lending to another library is just like lending to any other patron.

The lending overdues list in fILL is just a convenient way to see all of this in one place.

You can click on the borrowing library's email address to open your default email client and send a message to the borrower. (If you use web-based email, like Gmail, right-click the email address and open your email in a new browser tab).

# CURRENT (ACTIVE REQUESTS)

The Current (or Active) requests tab gives you an overview of all of your in-process borrowing and lending.

## BORROWING

All requests that you've made to borrow items from other libraries are here, regardless of where in the ILL life cycle the requests are. Remember that you can sort the table, or search within the table for specific

information (for example, if you wanted to see all of your current borrowing from a specific library, or all requests for a specific author).

## DETAILS OF THE CONVERSATION

| | | | | | | |
|---|---|---|---|---|---|---|
| Lords of the bow | Iggulden, Conn | 23786000012358 | MKL | 2012-09-21 11:17:06-05 | Checked-in | |

| Request ID | Timestamp | Msg from | Msg to | Status | Extra information |
|---|---|---|---|---|---|
| 2588 | 2012-08-15 16:25:30-05 | MSTOS | MKL | ILL-Request | null |
| 2588 | 2012-08-16 08:42:49-05 | MKL | MSTOS | ILL-Answer\|Will-Supply\|being-processed-for-supply | |
| 2588 | 2012-08-16 08:43:50-05 | MKL | MSTOS | Shipped | due 2012-09-13 |
| 2588 | 2012-08-21 16:51:43-05 | MSTOS | MKL | Received | |
| 2588 | 2012-09-14 14:06:42-05 | MSTOS | MKL | Renew | |
| 2588 | 2012-09-18 13:08:20-05 | MKL | MSTOS | Renew-Answer\|Ok | due |
| 2588 | 2012-09-19 18:42:14-05 | MSTOS | MKL | Returned | |
| 2588 | 2012-09-21 11:17:05-05 | MKL | MSTOS | Checked-in | |

Every interlibrary loan is a conversation between a borrower and one or more potential lenders. To see the details of the conversation for a specific request – when the request was made, when the lender responded and what the response was, shipping and return dates, and so on), click on the green '+' in the left-most column of the table.

## OVERRIDES

| Action | Do this... |
|---|---|
| Receive | if you have received the book from the lender, but the lender has not marked it as "Shipped".<br>An override message will be added to the request, and it will be forced to "Shipped".<br>The request will be added to your "Receiving" list so that you can control slip printing. |
| Lost | if your patron or your library has lost the item, or the lender marked it as "Shipped" but you never received it.<br>When the lender confirms the "Lost" message, the request will be closed and moved to history. |
| Close | if you have returned the book to the lender, but you get an Overdue notice because the lender has not marked it as "Checked-in"<br>An override message will be added to the request, and it will be closed and moved to history. |

Sometimes mistakes happen. Usually these can be overcome by talking with a real person at the other library (that's why we have the Contacts list!). Overrides – being able to get a request back into its proper place in the ILL life cycle – can be useful as a last resort.

Click on the green '+' in the right-most ("Overrides") column to see the available overrides.

## LOST ITEMS

If you or your patron has lost a book borrowed from another library, you'll need to come in to Current borrowing, find the request, and do an override to mark it as Lost. The lender will see this, and get in contact with you. *It is important to mark the item as lost, so the lender can close the ILL transaction.*

## LENDING

Borrowing | Lending | We could not lend

Copy | Excel | PDF | Print | Search:

| Title | Author | Requested by | Last update | Status | Message | Overrides |
|---|---|---|---|---|---|---|
| Close your eyes (Book #4) | Gunn, Robin Jones | MMNN | 2015-09-15 12:28:19-05 | Shipped | due 2015-10-17 | |
| Aging backwards: 10 years younger, 10 years lighter, 30 minutes a day | Esmonde-White, Miranda | MCNC | 2016-01-20 10:40:43-06 | Shipped | due 2016-02-17 | |
| Flight behavior: a novel | Kingsolver, Barbara | MSAD | 2016-02-16 17:20:57-06 | Received | | |
| The long way home: a Chief Inspector Gamache novel | Penny, Louise | MSAD | 2016-03-01 18:17:28-06 | Renew-Answer No-renewal | title needed to fill a hold | |

All requests that other libraries have made to borrow items from you are here (except the ones you could not lend… there's a separate tab for that), regardless of where in the ILL life cycle the requests are.

## DETAILS OF THE CONVERSATION

| | | | | | | |
|---|---|---|---|---|---|---|
| The long way home: a Chief Inspector Gamache novel | Penny, Louise | MSAD | 2016-03-01 18:17:28-06 | Renew-Answer No-renewal | title needed to fill a hold | |

| Request ID | Timestamp | Msg from | Msg to | Status | Extra information |
|---|---|---|---|---|---|
| 131776 | 2016-01-21 17:55:28-06 | MSAD | MSTOS | ILL-Request | null |
| 131776 | 2016-01-22 10:45:55-06 | MSTOS | MSAD | ILL-Answer\|Will-Supply\|being-processed-for-supply | |
| 131776 | 2016-01-22 10:51:48-06 | MSTOS | MSAD | Shipped | due 2016-02-19 |
| 131776 | 2016-01-26 16:14:02-06 | MSAD | MSTOS | Received | |
| 131776 | 2016-03-01 17:33:05-06 | MSAD | MSTOS | Renew | |
| 131776 | 2016-03-01 18:17:28-06 | MSTOS | MSAD | Renew-Answer\|No-renewal | title needed to fill a hold |

As with current borrowing, you can see the details of the conversation with the other library by clicking on the green '+' in the left-hand column.

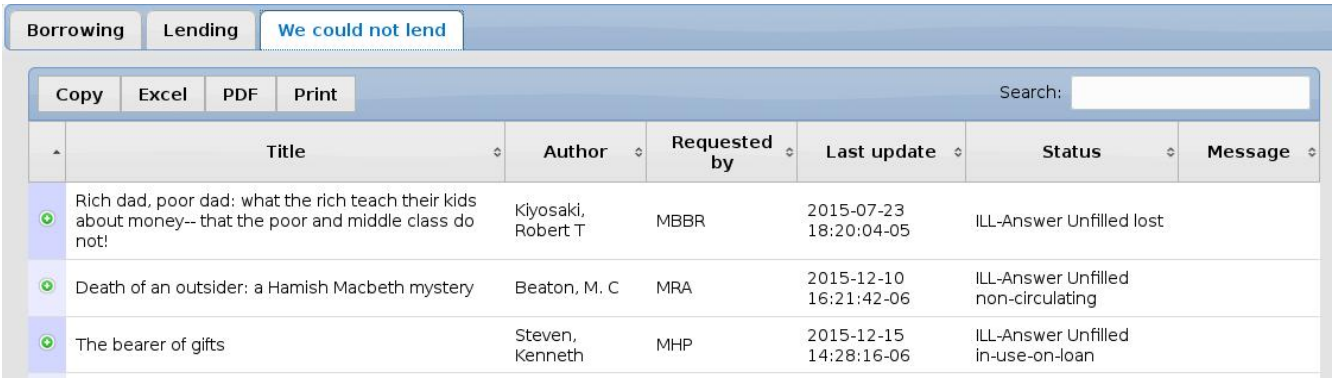
## OVERRIDES

| Action | Do this... |
|---|---|
| Returned | if you have received the book back from the borrower, but the borrower has not marked it as "Returned"<br>An override message will be added to the request, and it will be marked as "Checked in to ILS" and moved to history. |
| Change Due Date | if you have said Shipped, but need to change the due date (and the borrower has not marked it as "Received" yet) |

Lending has different overrides than borrowing….

Remember that overrides are a last resort.  Please try talking to someone at the borrowing library first!

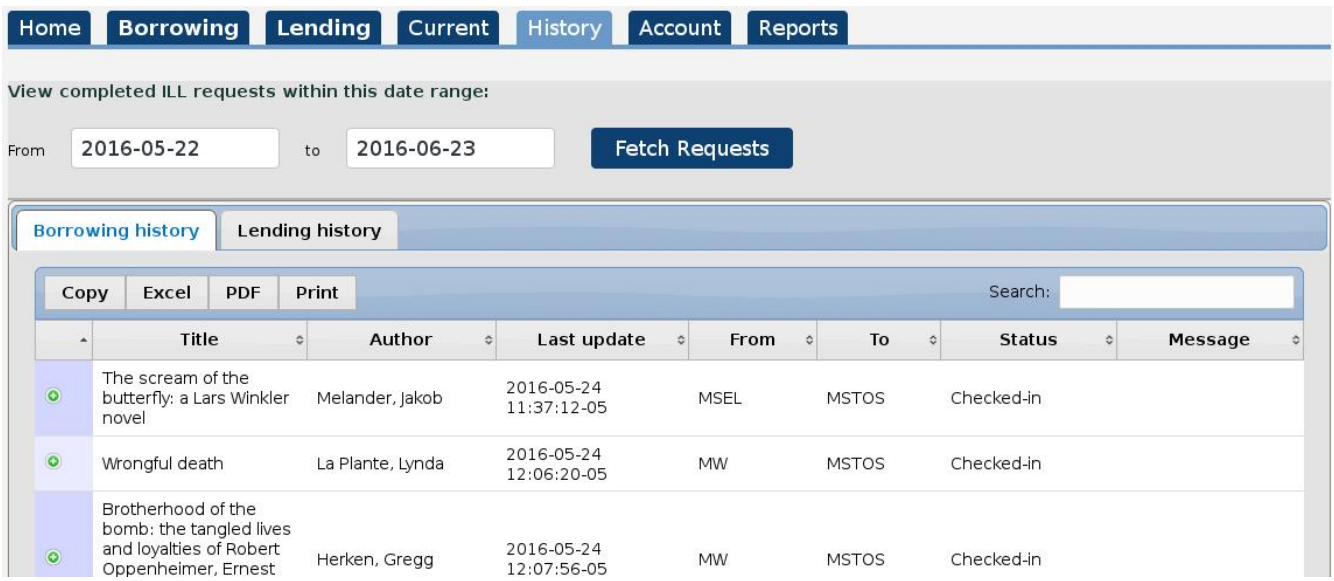
## WE COULD NOT LEND




| Title | Author | Requested by | Last update | Status | Message |
|---|---|---|---|---|---|
| Rich dad, poor dad: what the rich teach their kids about money-- that the poor and middle class do not! | Kiyosaki, Robert T | MBBR | 2015-07-23 18:20:04-05 | ILL-Answer Unfilled lost | |
| Death of an outsider: a Hamish Macbeth mystery | Beaton, M. C | MRA | 2015-12-10 16:21:42-06 | ILL-Answer Unfilled non-circulating | |
| The bearer of gifts | Steven, Kenneth | MHP | 2015-12-15 14:28:16-06 | ILL-Answer Unfilled in-use-on-loan | |

fILL keeps all of the requests you could not fill in a separate list so they don't clutter up the "current lending" list, while still giving you access to the requests and their conversation details.

## HISTORY




| Title | Author | Last update | From | To | Status | Message |
|---|---|---|---|---|---|---|
| The scream of the butterfly: a Lars Winkler novel | Melander, Jakob | 2016-05-24 11:37:12-05 | MSEL | MSTOS | Checked-in | |
| Wrongful death | La Plante, Lynda | 2016-05-24 12:06:20-05 | MW | MSTOS | Checked-in | |
| Brotherhood of the bomb: the tangled lives and loyalties of Robert Oppenheimer, Ernest | Herken, Gregg | 2016-05-24 12:07:56-05 | MW | MSTOS | Checked-in | |

When an ILL request completes its life cycle, and gets checked back in at the lending library, the request is no longer active. It automatically gets moved into History.

There can be a lot of history! You can specify the date range that you'd like to look back at, and then fetch those records.

Loading history can take a long time, especially if you have chosen a longer date range.

Just like with Current, you can click the green '+' in the left-hand column to see details of the conversation.

# ACCOUNT

The Account tab holds information and settings regarding your library's fILL environment.

## SETTINGS

This is the core of your account: contact information, mailing address, z39.50 server details and more.

### CONTACT INFORMATION

Enter the email address and web site address for your library. The email address will show up in the Contacts list, and both the email address and web site address are used by the public side of fILL to enable your patrons to contact you.

### ILL MAILING ADDRESS

Enter the mailing address where you want interlibrary loans delivered.

This information will be displayed both on the Contacts list and on the Shipping list.

Note that this does not interact with the Canada Post Shipping Tool's address book at all…

## Z39.50 SERVER

You can stop fILL from searching your catalogue here (for example, if you are closing for renovations or are otherwise unavailable for an extended period of time).

Be aware that when someone does a search on fILL and makes a request, the system takes a snapshot of all of the potential lenders **at that time** (known as the "sources" list), and then tries them one-by-one.

You may still get some requests even after stopping fILL from searching your library, if

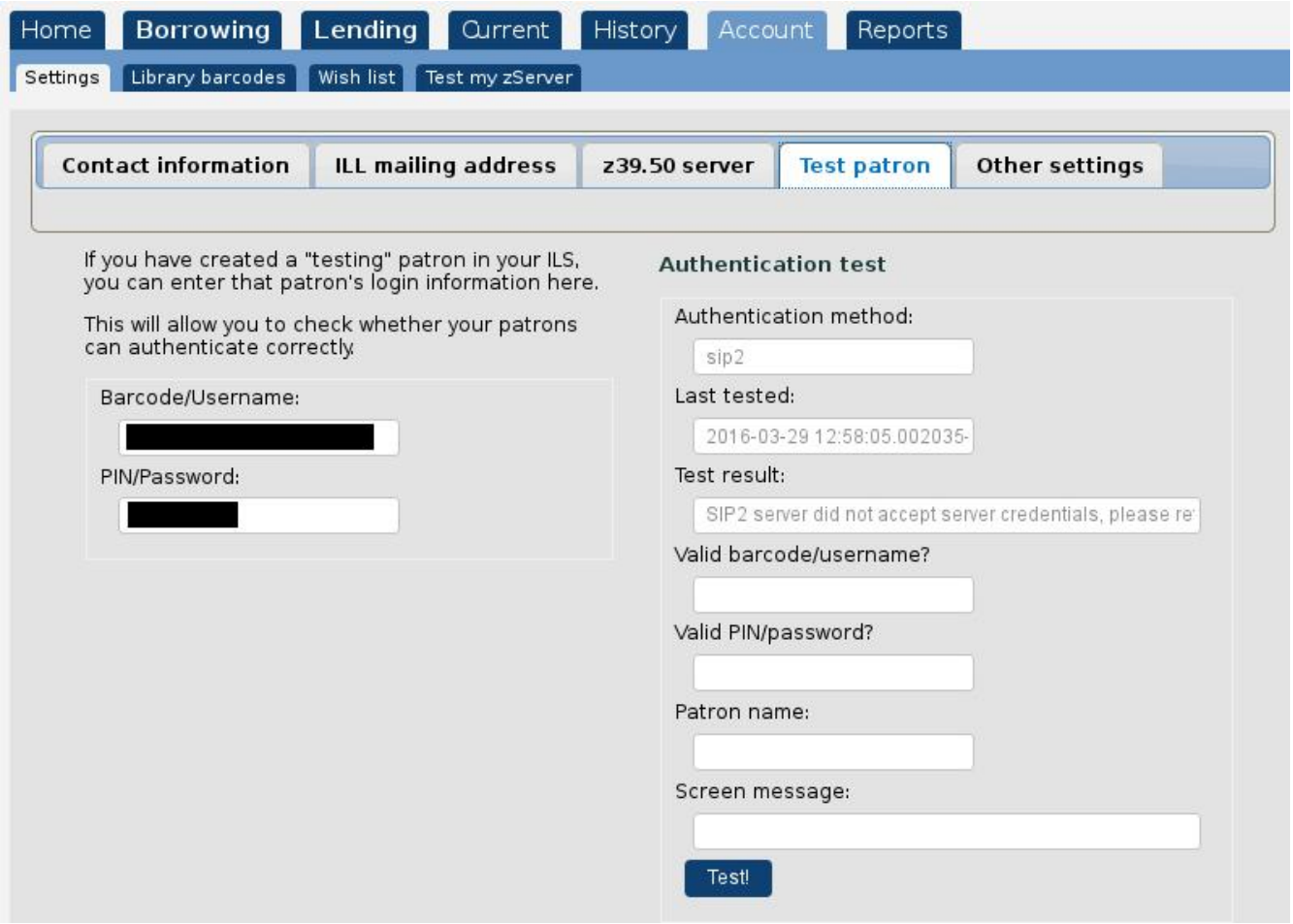
a) you were identified as a potential lender in a search/request that happened before you disabled searching, and
b) the lenders that preceded you in the sources list all replied "unfilled".

Remember to re-enable yourself once you're back on-line!

If your z39.50 connection information – address, port, and database name – changes, please update it here and/or contact Public Library Services.

If you are a branch of a regional library which uses a shared ILS, or your system is a member of the Spruce Cooperative, you'll see this instead:

## TEST PATRON

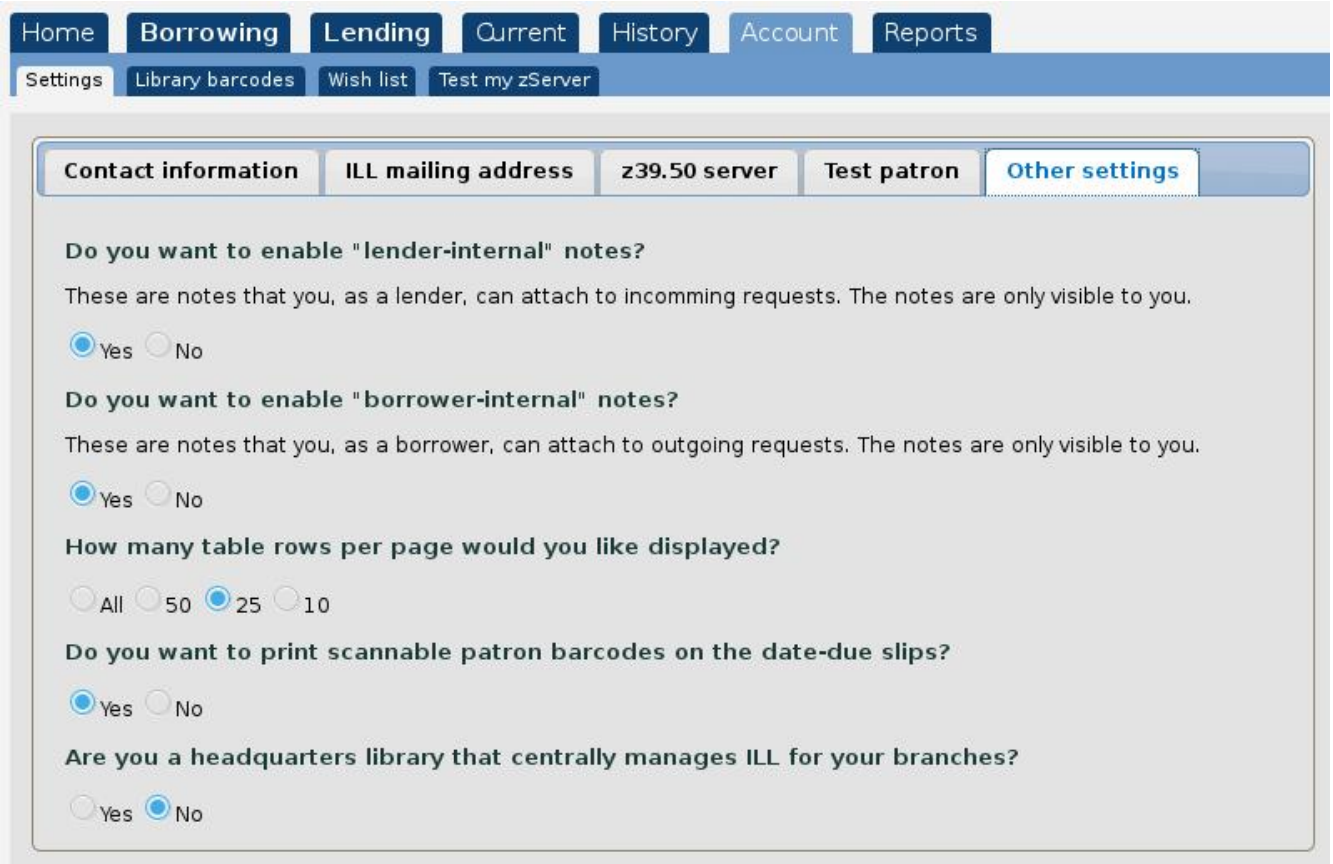



Make sure that your patrons can log in to fILL by setting up a test patron in your ILS. Enter the login credentials that the test patron would use to log in to your OPAC. (You only need to set this up once).

When you click the “Test!” button, fILL will try to authenticate the test user against your ILS. If the test is successful, you’ll see a ‘Y’ for Valid barcode/username and for Valid PIN/password, and the test user’s name in the “Patron name” field.

If the test is not successful, please contact Public Library Services.

## OTHER SETTINGS




There are a few other settings which allow you to customize some things about fILL.

You can disable fILL's internal notes if you don't use them (and you would rather have the extra screen space).

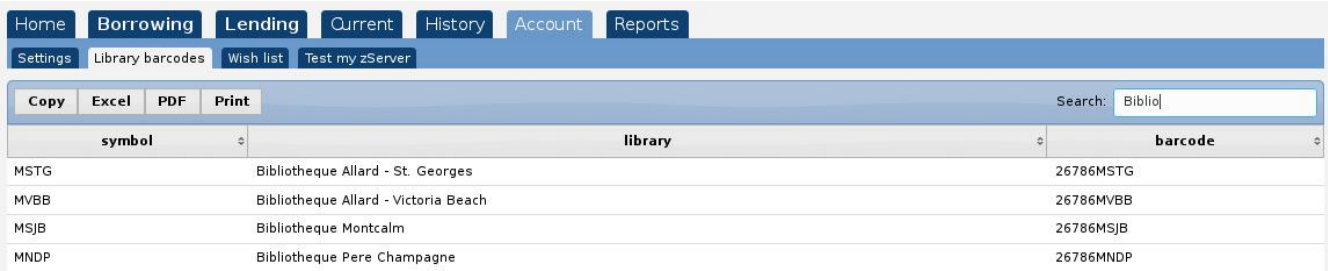
By default, all fILL tables display 25 rows per page.  You can change that globally here.

For patron slips, if you don't want scannable barcodes printed you can turn that off.

And finally, if you are a headquarters library for a regional system, you can switch between centrally handling all ILL requests (i.e. requests intended for any of your branches instead come to you) and letting the requests go directly to your branches.

## LIBRARY BARCODES

If you have the other libraries in Manitoba set up as patrons in your ILS for interlibrary loan purposes, and you would like the fILL Pull List to print scannable barcodes for these libraries-as-patrons, please contact Public Library Services. PLS will need a list of the libraries and their associated barcodes; we will be happy to load these into fILL for you.




If you need to change the barcode for a particular library, find it in this list and click on the barcode number and you will be able to edit the text.

## WISH LIST (CONSIDER FOR ACQUISITION)

The “New patron requests” list and the “Unfilled” list both allow you to add a title to your wish list.

The wish list is intended to be a holding area for items that you want to consider purchasing – after all, at least one of your patrons specifically asked for it! The list contains details about the item, as well as the barcode of the patron that originally requested it (so, if you do decide to purchase, you can put a hold on it in your ILS).

When you’re done with the list, click the “Clear the wish list” button to empty the list.

## TEST MY ZSERVER

This is an expanded version of the zServer status check on the Home tab.

It gives much more detail on the success or failure of the ability to connect to your system, search it and return results.

If you are seeing errors here (or on the Home tab), contact Public Library Services. We will be able to determine where the problem comes from (fILL itself, your server address, your router, or the z39.50 server).

# REPORTS

## CONTACTS

| library | Symbol | Phone | Email address | Mailing address |
|---|---|---|---|---|
| Assiniboine Community College | MBAC | | library@assiniboinec.mb.ca | 1430 Victoria Avenue East<br>Brandon, MB R7A 2A9 |
| Bette Winner Public Library | MGI | 204-652-2617 | library@townofgillam.com | 235 Mattonnabee Ave.<br>Box 400<br>Gillam, MB R0B 0L0 |
| Bibliotheque Allard - St. Georges | MSTG | 204-367-8443 | ill@allardlibrary.com | Box 157<br>Box 157<br>St Georges, MB R0E 1V0 |

If you need to get in contact with another library, this is the definitive list of contact information.

## INTERLIBRARY LOAN STATISTICS

Home | Borrowing | Lending | Current | History | Account | Reports

Contacts | ILL stats | Average times | Borrowers/Lenders | Board report

Search:

| Date | | | Borrowing | | | | | Lending | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Year | Month Number | Month | Books requested | Actual requests | Unfilled responses | Lender shipped | We cancelled | Requests to lend | Could not fill | Shipped | Forward to branch | Borr canc |
| 2016 | 6 | June | 3 | 3 | 1 | 2 | | 18 | 7 | 8 | | |
| 2016 | 5 | May | 27 | 28 | 8 | 21 | | 145 | 31 | 112 | | |
| 2016 | 4 | April | 48 | 57 | 23 | 28 | | 152 | 61 | 100 | | |
| 2016 | 3 | March | 55 | 67 | 20 | 45 | | 201 | 43 | 140 | | |
| 2016 | 2 | February | 55 | 58 | 14 | 38 | | 170 | 62 | 103 | | |
| 2016 | 1 | January | 41 | 42 | 8 | 37 | | 141 | 48 | 93 | | |

This is a month-by-month count of the transactions involving your library:

**Borrowing**

| | |
|---|---|
| Books requested | The number of times you've searched for and requested a title. |
| Actual requests | If a potential lender cannot fill your request, a new request to the next lender in the sources list is created… so you may have a single "book requested" that turns into more than one "actual requests". |
| Unfilled responses | The number of times any potential lender has replied that they cannot fill a request. |
| Lender shipped | During this month, how many items were shipped to you. |
| We cancelled | How many borrowing requests you cancelled for whatever reason. |

**Lending**

| | |
|---|---|
| Requests to lend | The number of times during this month that other libraries have requested from you. |
| Could not fill | How many times you've sent an "Unfilled" response to a request. |
| Shipped | How many items you've actually sent. |
| Forward to branch | For regional systems which handle ILL centrally, this is a count of the requests you've sent on to your branches rather than handling from the HQ collection. |
| Borrower cancelled | How many of the requests to you were cancelled by the borrower before you could respond. |

**NOTE** that these counts do not necessarily add up! If, say, you made a request to borrow at the end of April, got 6 unfilled responses over the course of May, and finally had a lender able to fill the request and ship to you in June, each of those transactions would be counted *in the month they occurred*.

## AVERAGE TIMES

Home | Borrowing | Lending | Current | History | Account | Reports

Contacts | ILL stats | Average times | Borrowers/Lenders | Board report

Search:

| Lender | Borrower Request to Lender Respond (days) | Lender Will-Supply to Lender Shipped (hours) | Lender Shipped to Borrower Received (days) | Borrower Renew to Lender Renew-Answer (days) | Borrower Received to Borrower Returned (days) | Borrower Returned to Lender Check-in (days) |
|---|---|---|---|---|---|---|
| Assiniboine Community College | | | | | | |
| Average | 1 | 7 | 4 | 1 | 17 | 4 |
| Bette Winner Public Library | 1 | 0 | 7 | | 14 | 9 |
| Bibliotheque Allard - St. Georges | 0 | 1 | 4 | 0 | 23 | 3 |

This report is a quick way to compare your response times to those of other libraries, or to the overall provincial averages. It includes columns for “Lender shipped to Borrower received” and “Borrower returned to Lender check-in”, which are measures of how long transit times are.

## BORROWERS/LENDERS REPORT

Home | Borrowing | Lending | Current | History | Account | Reports

Contacts | ILL stats | Average times | Borrowers/Lenders | Board report

Year: 2016 Month: All months, Specific month: , or No months (year summary) Create Report

Search:

Borrowed from / Loaned to report, 2016 Summary.

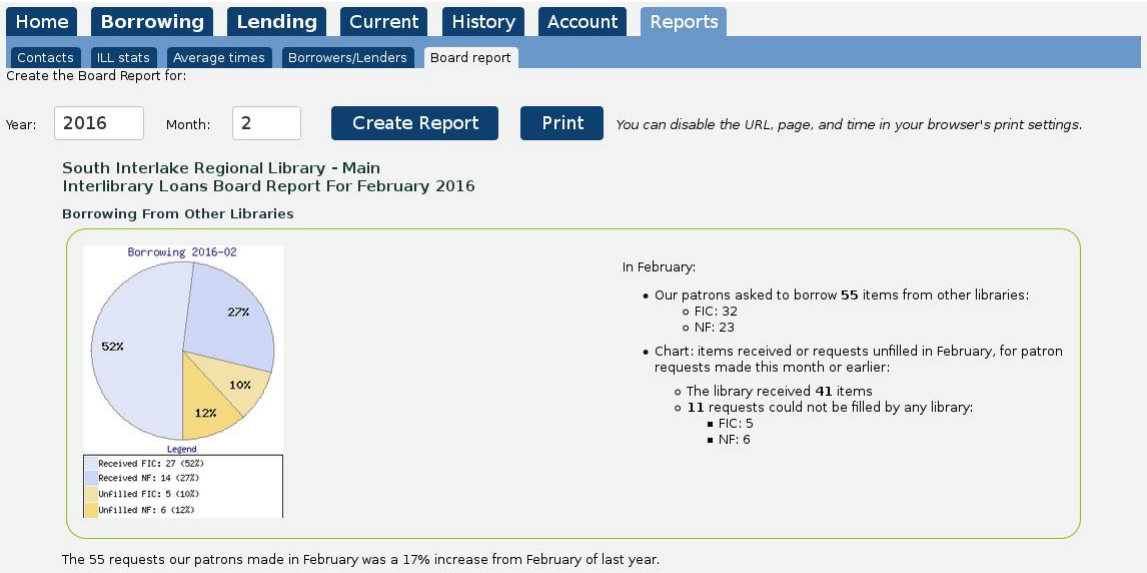
| Period | Library | We borrowed | We loaned |
|---|---|---|---|
| 2016 | Bette Winner Public Library | 0 | 4 |
| 2016 | Bibliotheque Allard - St. Georges | 2 | 6 |
| 2016 | Bibliotheque Allard - Victoria Beach | 0 | 11 |
| 2016 | Bibliotheque Montcalm | 1 | 4 |

The Borrowers/Lenders report lists all of the participating libraries, and how many times you’ve borrowed from or loaned to them during the selected period.

## BOARD REPORT

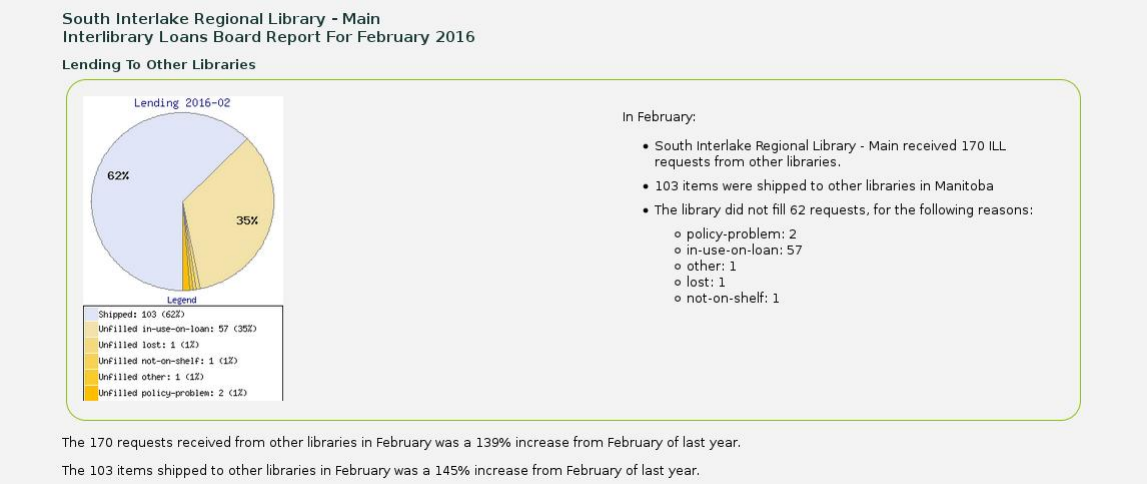
The single-page Board report is a handy (and consistent) way for you to report your ILL activities to your board.

### BORROWING




The borrowing section of the report breaks down your borrowing into fiction and non-fiction, shows how many ILL requests you made on behalf of your patrons, and how many requests went unfilled (note that this will also include "unfilled" responses you received in the given month which are responses to requests made in the previous month). It also compares the given month with the same month the previous year.

### LENDING




The lending section details the number of items you shipped, as well as a breakdown of requests you did not fill by the reasons selected. It also compares the given month with the same month the previous year.

## SUGGESTED DAILY PROCESSES

1. Check for new requests from other libraries. You can do this at any time, as often as you want, by going to "Lending" => “Pull list”. Print the list and pull the books, check them out in your ILS, and handle them in fILL ("Lending" => “Respond”)

2. Check for unfilled requests (requests which you have made that a lender could not fill), by going to "Borrowing" => “Unfilled”

3. Check for any holds that were placed for you, by going to "Borrowing" => “Holds placed”. Contact patrons and let them know the expected date.

4. Check for new patron requests.

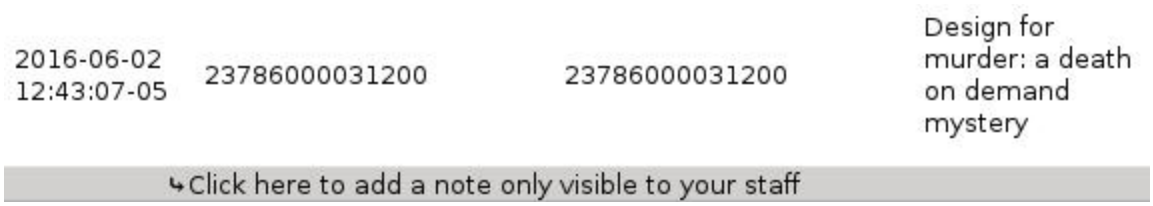
5. Make requests of other libraries (however it suits your workflow – as the patron asks, during slower times, end of the day, first thing next morning, ....)

6. When you ship, receive, return, or check in an ILL book, mark it in fILL.

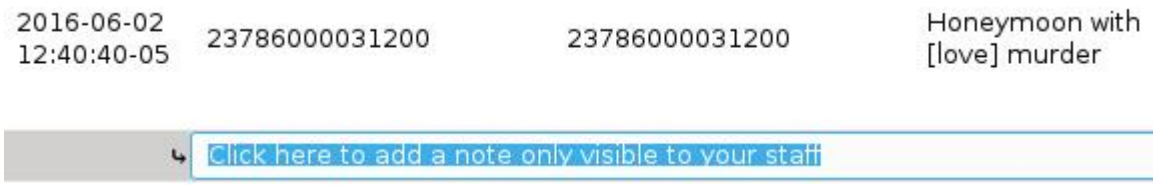
## INTERNAL NOTES

Internal notes are notes that you can add to any request (as a lender) or request “group” (as a borrower. The request group includes the original request, and any subsequent requests due to lenders not being able to fill).

Internal notes are only visible to you and your staff.




When you click on the note, it will become editable:




You can turn internal notes on or off, globally, in Account > Settings > Other settings.

## A NOTE ON HOLDS

According to the ISO standard for Interlibrary Loans, the borrower can specify one of three options regarding holds:

- Ask the lender to place a hold (if it is the lender's policy to do so)
- Ask the lender to NOT place a hold (effectively saying that the borrower would prefer to try the next lender instead).
- Leave it up to the lender.

The lender's policy always takes precedence when a hold is asked for. That is, if the lender has a policy of not placing holds on certain items, they can always say "unfilled" rather than place the hold. The lender may also (for example) agree to place a hold if an item is out and there are no other holds on it, but not if their own patrons have holds on it. It's up to the lender.

## WORKING WITH LISTS

fILL uses interactive data tables to present interlibrary loan information to you. These data tables enable you to sort and search through the data quickly and easily, save the data to your own computer, or format it for printing. Here's how:

### EXAMPLE DATA TABLE

This example is taken from the Lending => Check-ins section; other data tables will present different fields and actions that you can perform on a request.

Search: Copy CSV Excel PDF Print Save

| Title | Author | Last update | Back from | Check-in |
|---|---|---|---|---|
| The whole-brain child: 12 revolutionary strategies to nurture your child's developing mind | Siegel, Daniel J | 2013-12-16 14:06:23-06 | MESP | Checked In To ILS |
| The castle of Otranto: a gothic story; and, The mysterious mother : a tragedy | Walpole, Horace | 2014-02-19 16:33:01-06 | MTPK | Checked In To ILS |
| the curious incident of the dog in the night-time: a novel | Haddon, Mark | 2013-11-21 16:29:20-06 | MDPRO | Checked In To ILS |
| Good things I wish you: a novel | Ansay, A. Manette | 2013-11-22 16:23:55-06 | MCCB | Checked In To ILS |
| Hannah Coulter: a novel | Berry, Wendell | 2013-12-27 14:54:33-06 | MMR | Checked In To ILS |
| Crossing to safety | Stegner, Wallace Earle | 2013-11-07 12:42:14-06 | MSOG | Checked In To ILS |
| Retraining: teaching new skills to previously trained horses | Smith, Sharon B | 2013-11-19 10:04:57-06 | MESM | Checked In To ILS |
| Flying hero class | Keneally, Thomas | 2013-11-06 11:27:27-06 | MHH | Checked In To ILS |
| No woman, no cry: my life with Bob Marlely | Marley, Rita | 2013-12-03 14:01:54-06 | MSTP | Checked In To ILS |

**As items are checked in here, they are removed from this list. They must still be checked in to your ILS.**

## "DISAPPEARING" ROWS

A quick note about the action buttons (usually in the right-most column): As you take actions, the rows may disappear from the table.

This is normal.

In the above example, if you click the "Checked in to ILS" button, that request gets removed from the active (current) requests and moved to history.

You will always be able to find a request in the Current ILLs section (or History, after its life cycle is complete), regardless of its status.

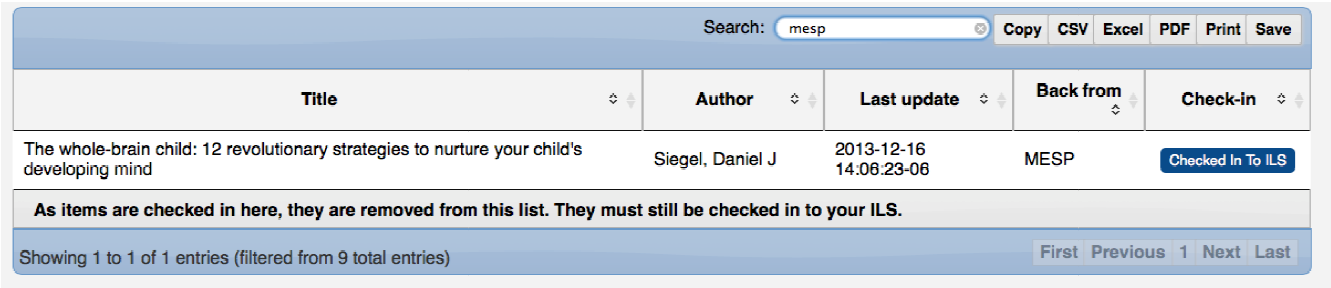
## SORTING THE DATA

You can sort a data table by clicking on the column heading for a column.

- Clicking it again will reverse the sort order.
- You can sort by any column (some will make more sense than others), as often as you want.
- You can sort by multiple columns at once. Click on the heading of the first column to sort by, and then shift-click on any additional columns. (In our example table, you could click the "Back from" column to sort by the library who has returned the item, and then shift-click the "Title" column to add a title sort. You'll end up with a list grouped by library and (for each library) sorted by title.)
- Sorting is very fast – the data table already has all of the data, and does not need to talk to the fILL server each time.

## SEARCHING WITHIN THE DATA

The search box, in the upper right corner of the data table, is fast and powerful. It enables you to do a keyword search across all of the data in the table, and display only those rows that match.



For example, if you wanted to see which requests are from Southwestern Manitoba Regional Library, just enter their library symbol, 'mesp', in the search box:

- The data table begins filtering as soon as you begin typing.
- Searching is not case sensitive (e.g. Searching for 'mmiow' will also match 'MMIOW')
- To get back to the complete table, just delete the text you've entered in the search box.
- Searching is very fast – the data table already has all of the data, and does not need to talk to the fILL server each time.
- You can combine searching and sorting. For example, if you typically handle ILL requests library-by-library, you could use 'search' to display the requests from a specific library, and then sort in call # order to make it easy to pull books from the shelves.

Some experimentation should let you figure out what works best with your workflows.

## COPY / EXCEL / PDF / PRINT

In the upper left corner of the data table is a set of buttons that enable you copy, save, and print the entire contents of the data table, if that suits your workflow.

- Copy: lets you paste the data into a document
- Excel: save the data in a format that you can open in Excel.
- PDF: saves the data as a PDF (Adobe Acrobat) file
- Print: formats the data table for printing. Use the browser's print function to print it. Press ESC (escape) to return to the current view. Note that printing directly like this will also show any hidden columns in the table; most tables have “internal”, hidden columns such as the request #, group # (gid), etc.

## LAST WORD

fILL should handle all of the ILL tracking, statistics gathering work that makes up the bulk of the “ILL overhead” in terms of staff time. If you keep copies of the data locally for some ILL-management reason that fILL doesn't handle, let us know – if it makes ILL workflows easier for all libraries, we'll see about adding that functionality directly in fILL.