

Inter Library Loan Manual

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Inter Library Loan Manual

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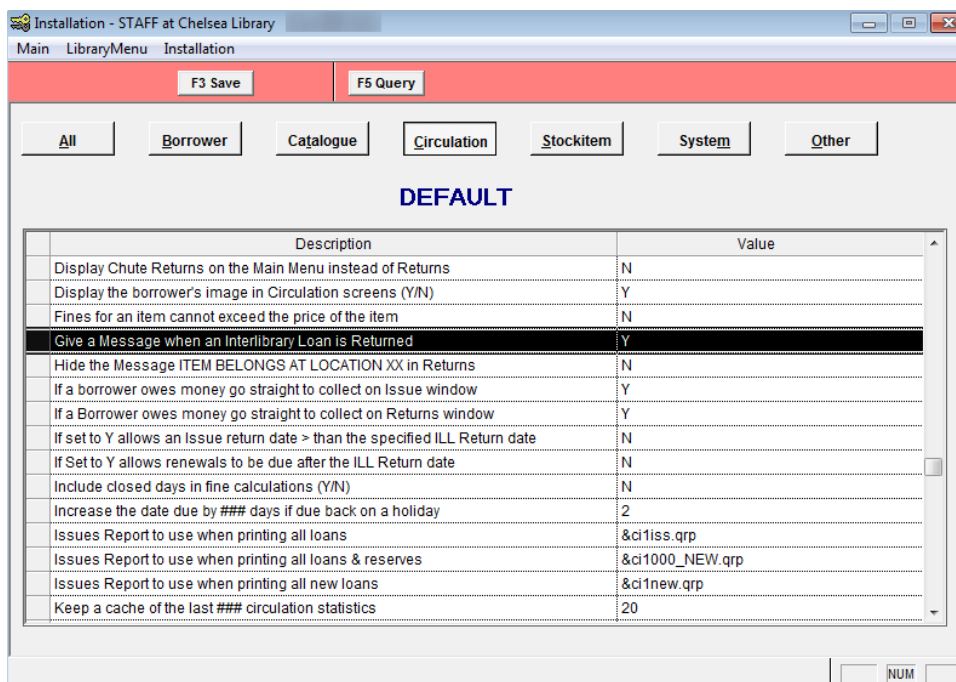
OVERVIEW

It is possible to setup Inter Library Loans within Amlib to process requests from borrowers and also issuing items to external libraries. Using the system sites can keep track and manger Inter Library Loans more efficiently.

INTER LIBRARY LOAN SETUP

Installation Parameter

Sites that are setting up Inter Library Loan for the very first time should check the Installation Parameter set in **Main > Supervisor> Installation – Circulation** tab.



Parameter	Description
Give a Message when an InterLibrary Loan is Returned	A on-screen message to be displayed if a stockitem marked as an ILL is returned. Insert Y (YES) or N (NO)
If set to Y allows renewals to be due after the ILL Return date	ILL stockitems can be renewed and the due date can be set to after the original ILL Return Date. Insert Y (YES) or N (NO)
If set to Y allows an issue return date > than the specified ILL Return date	Issue Return Date of the ILL stockitem can be greater than the set ILL Return Date. Insert Y (YES) or N (NO)

Note: Set these settings in the Default Location parameter, if parameter set does not apply to other locations in the Installation screen select **Installation > Choose Location**, select the other location and insert the applicable parameter setting for this location.

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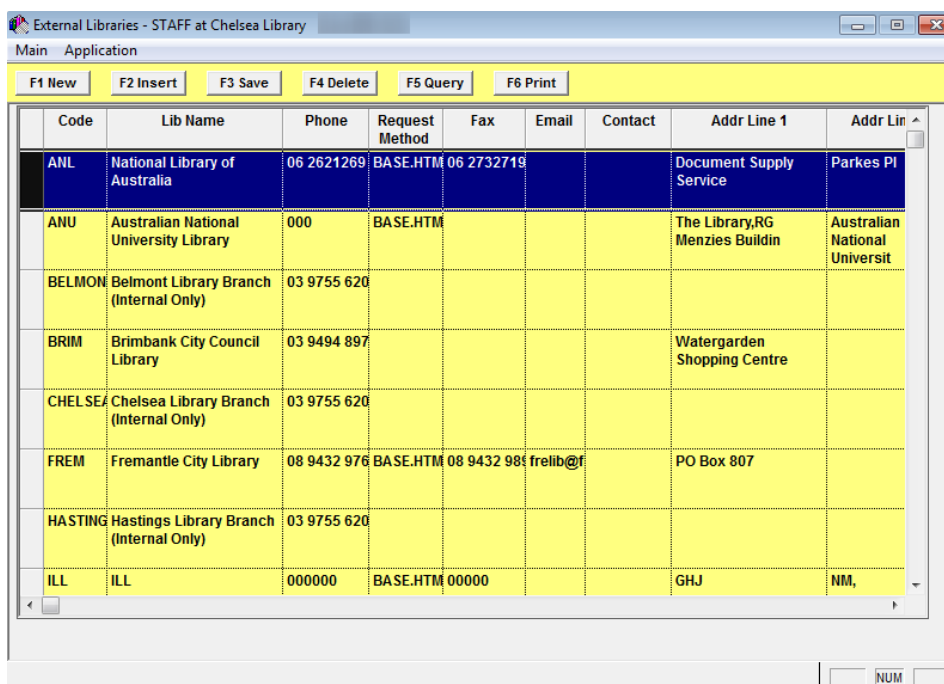
Each time a change in the Installation screen is made press **F3Save** and restart Amlib for the changes to become effective.

Create External Libraries

External libraries need to be created prior to creating the first ILL record. This is created in the StockExternalLibs table.

This table is referenced when creating Inter Library Loan and supplying information.

1. Launch the Amlib Client
2. Go to **Main > Stockitem> Stockitem**
3. From the Stockitem menu select, **Application > StockExternalLib** – the External Libraries screen will display:



Code	Lib Name	Phone	Request Method	Fax	Email	Contact	Addr Line 1	Addr Lin
ANL	National Library of Australia	06 2621269	BASE.HTM	06 2732719			Document Supply Service	Parkes Pl
ANU	Australian National University Library	000	BASE.HTM				The Library,RG Menzies Buildin	Australian National Universit
BELMON	Belmont Library Branch (Internal Only)	03 9755 620						
BRIM	Brimbank City Council Library	03 9494 897					Watergarden Shopping Centre	
CHELSEA	Chelsea Library Branch (Internal Only)	03 9755 620						
FREM	Fremantle City Library	08 9432 976	BASE.HTM	08 9432 98	frelib@f		PO Box 807	
HASTING	Hastings Library Branch (Internal Only)	03 9755 620						
ILL	ILL	000000	BASE.HTM	000000			GHJ	NM,

4. Click the **F1New** button
5. Enter the External Libraries detail

Note: If you are intending to send request email via E-Mail the 'Request Method' column must have an 'E' for Email entered or enter email address details in this column, if 'Request Method' is left empty it is assumed that sending requests is either in letter format or fax format.

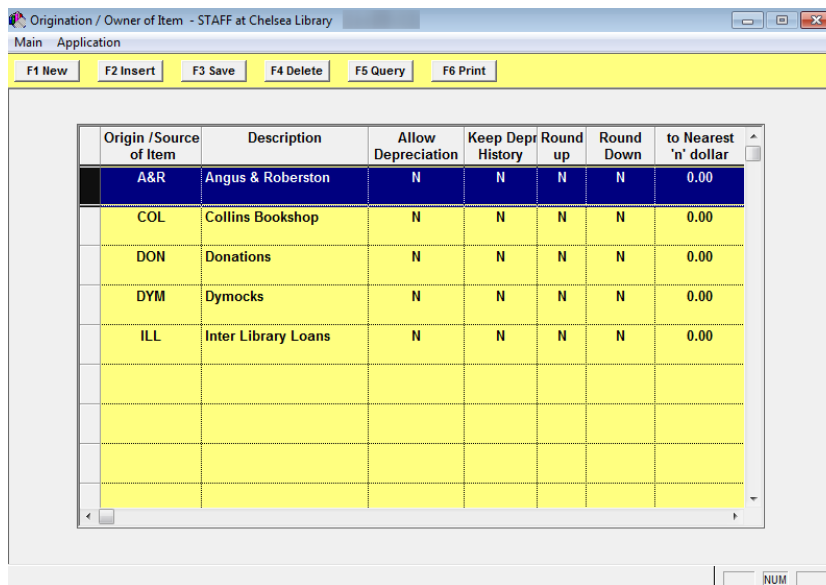
6. Click the **F3Save** button to save the newly entered External Library

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Loan Source

If you wish to define Source for items this can be set in the Stockitem – Origination/ Owner of item screen.

1. Launch the Amlib Client
2. Go to **Main > Stockitem> Stockitem**
3. From the Stockitem menu select, **Application > StockitemOrigins**– the Origination/ Owner of Item screen will display:



4. Click **F1New** button
5. Enter detail for the source:

COLUMN	EXPLANATION
Origin/Source of Item	Code of up to 3 characters in length to identify the origin of the item
Description	Description of up to 50 characters in length to describe the origin of the item
Allow Depreciation	Enter Y/N to allow depreciation on this group of items
Keep Depreciation History	Enter Y/N to keep a depreciation history on this group of items
Round up	Enter Y/N so that during depreciation, round up to the nearest dollar as shown in the last column
Round down	Enter Y/N so that during depreciation, round down to the nearest dollar as shown in the last column
To Nearest "n" dollar	Enter the amount that the rounding up or down will be calculated.

6. Click the **F3Save** button – the new code will now be displayed in the Source list

Form & Stats Codes

Specific Form and/or Stats codes can be setup specifically for Inter Library Loans. Different codes can allow different validation and loan parameter. Both form and/or stats code can then be used for reporting purposes.

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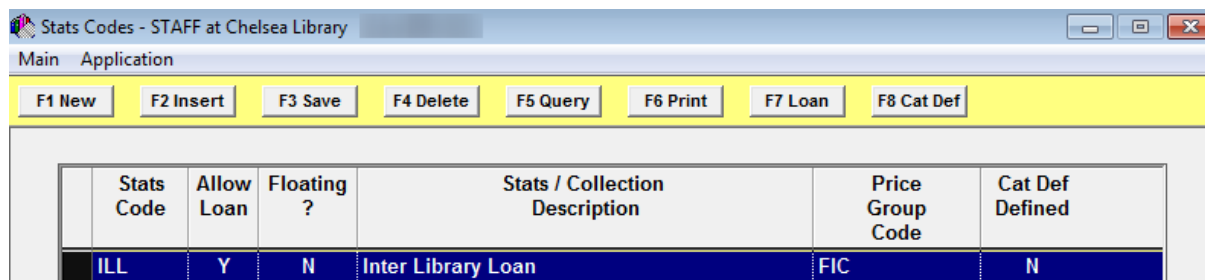
To create a new Form code or Stats code, this can be done by going to **Main > Stockitem > StockitemStatsCode** (or **StockitemForm**).

Setting New Stats Code

1. Go to **Main > Stockitem > StockitemStatsCode** – the Stats Codes screen will display
2. Click the **F1New** button
3. Enter detail for the new Stats Code:

Column Heading	Explanation
Stats Code	Stats code, up to 6 characters in length
Allow Loan	Y or N. Although forms may be specified as Not Allowed for Loan, this may be overridden at the point of issue
Floating	Floating collections enable items to be borrowed at one Location and returned at another, changing the Permanent and Temporary Locations on the Stockitem to the Return Location. No prompts display
Stats/ Collection Description	Description, up to 50 characters in length
Price Group code	Used to assign items with this stats code to a particular group for pricing and depreciation purposes.
Cat Def Defined	Y or N. This is automatically updated by defining Catalogue Definitions using the [F8] option. This allows definition of relationships between Stats types and MARC parameters to assist in the automatic allocation of Stats codes to items created from MARC downloads.

4. Click the **F3Save** button – the new code will now be displayed in the Stats Codes list:



Setting Form Code Validation

The Form Type Validation table represents the fields that are needed before a newly created stockitem is allowed to be Saved.

1. Go to **Main > Stockitem > StockitemForm**
2. Highlight the applicable Form Code and click the **F8Validtn** button – the Form Type Validation screen will display

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Form Type Validations																
F3 Save					F5 Query					F6 Print						
Form	Line 1	Line 2	Line 3	Line 4	Line 5	Line 6	Stats Code	Cost	Perm Locn	Temp Locn	For Loan	Acc Date	Recd Date	Item Origin	Loan Type	
AC	Y	N	N	N	N	Y	Y	N	Y	Y	N	N	Y	N	N	
BK	Y	N	N	N	N	Y	Y	N	Y	Y	N	N	N	N	N	
BR	Y	N	N	N	N	N	Y	N	Y	Y	N	N	Y	N	N	
CD	Y	N	N	N	N	N	Y	N	Y	Y	N	N	Y	N	N	
CR	Y	N	N	N	N	N	Y	N	Y	Y	N	N	Y	N	N	
EQ	Y	N	N	N	N	N	N	Y	Y	N	Y	N	Y	N	N	
ILL	Y	N	N	N	N	N	N	N	Y	N	Y	N	N	N	N	

3. Enter the validation for the Form Type either **Y** or **N** to indicates whether or not a field must be included, Lines 1 – 6 relate to the Stockitem Display but usually defaulted to:

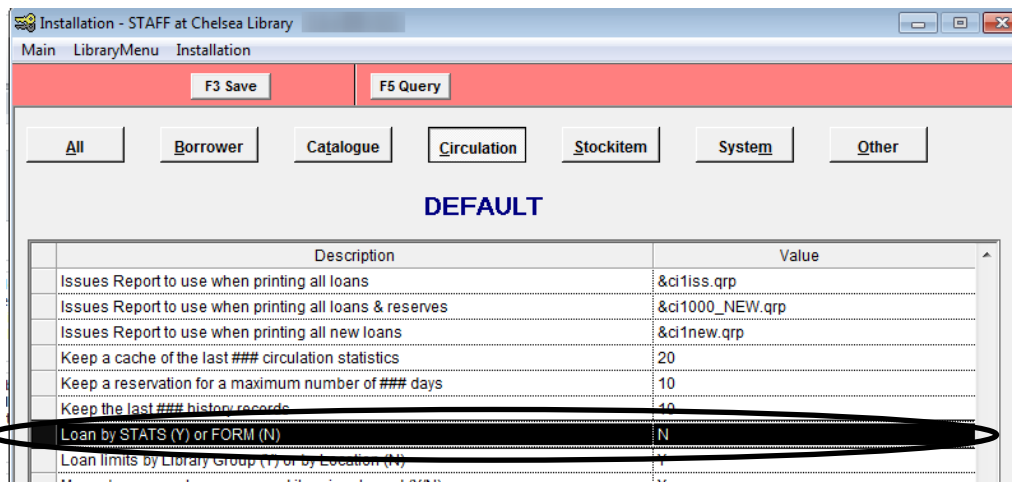
Column	Description
Line 1	Usually the Title
Line 2	Usually the Author
Line 3	Often Subject (only 1 Subject Heading is displayed on this screen) or Publisher
Line 4	Usually the Series or ISBN
Line 5	Often Publisher or Subject
Line 6	Usually the Call Number

4. Press the **F3Save** button to save the validation entered

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Setting Loan Parameters

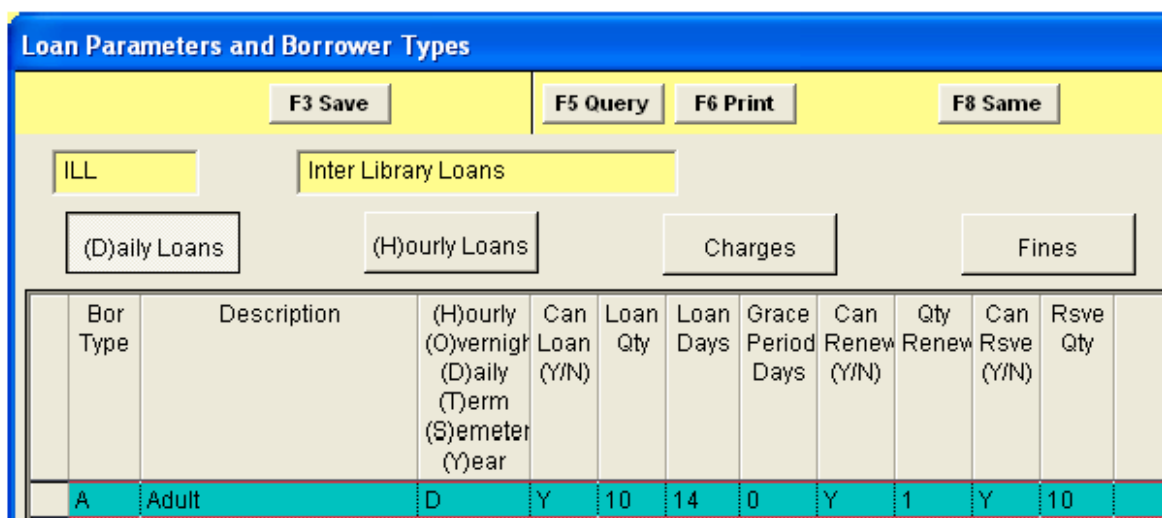
It is possible to have your system control loan periods by the Item Stats code/or Form code. This is set by a parameter in **Main > Supervisor> Installation**, click the **Circulation** tab.



Note: Depending on how the system control loan periods, the loan parameter will be set in either in **Main > Stockitem> StockitemForm**, or **Main > Stockitem> StockitemStatsCode**

In the above example the loan period is controlled by the Stockitem Form Code. To setup the Loan parameter:

1. Go to **Main > Stockitem> StockitemForm**
2. Highlight the applicable Form Code and click the **F7Loan** button – the Form Code screen will display



3. Enter the Loan Parameter for each borrower type – see the tables below for explanations for each tab and its content purpose
4. Once new parameter have been entered press the **F3Save** button

Daily Loans Tab

The fields in this window include:

COLUMN NAME	EXPLANATION	ENTRY
-------------	-------------	-------

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Code	Displays the Form/Stats code for each corresponding Stockitem Form or Stats code	
Description	Displays the Form or Stats description for each corresponding Stockitem Form or Stats code	
Type of Loan (D,H)	Displays whether the Loan is a Daily, Hourly, Overnight, Semester, Term or Yearly type Loan	D/H/S/T/Y/O
Can Loan?	Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?	Y/N
Loan Qty	The number of Items of this Form that may be on loan to this borrower type at any one time. For example, a Borrower Type may be allowed 8 items but only 1 item with a Form of Video.	nn
Loan Days	The usual loan period in days (which can be overridden at the time of Issue).	nn
Grace Period	Period by days before which a charge will be made for late items. Whether the charge itself is calculated from the actual due date or the due date plus the grace period is determined in the Supervisor, Installation menu.	nn
Can Renew?	Determines whether borrowers can renew items of this type.	Y/N
Renew Times	Controls the number of times a renewal of a loan for items of this Form for or by a borrower.	nn
Can Reserve?	Determines whether borrowers can make or request reservations for this type of item.	Y/N
Reserve Qty	Controls the number of reservations allowed for items of this Form for or by a borrower	nn

Hourly Loans Tab

The fields in this window include:

COLUMN NAME	EXPLANATION	ENTRY
Code	Displays the Form/Stats code for each corresponding Stockitem Form or Stats code	
Description	Displays the Form or Stats description for each corresponding Stockitem Form or Stats code	
Type of Loan (D,H)	Displays whether the Loan is a Daily or Hourly type Loan	D/H
Can Loan?	Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?	Y/N
Loan Qty	The number of Items of this Form that may be on loan to this borrower type at any one time. For example, a Borrower Type may be allowed 8 items but only 1 item with a Form of Video.	nn
Loans in Hours	The usual loan period in hours (which can be overridden at the time of Issue).	nn.nn
Grace Period Hours	Period of hours before which a charge will be made for late items. Whether the charge itself is calculated from the actual due date or the due date plus the grace period is determined in the Supervisor, Installation menu.	nn
Can Renew?	Determines whether borrowers can renew items of this type.	Y/N

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Renew Times	Controls the number of times a renewal of a loan for items of this Form for or by a borrower.	nn
Can Reserve?	Determines whether borrowers can make or request reservations for this type of item.	Y/N
Reserve Qty	Controls the number of reservations allowed for items of this Form for or by a borrower	nn

Charges Tab

The fields in this window include:

COLUMN NAME	EXPLANATION	ENTRY
Type	Displays the Form/Stats code for each corresponding Stockitem Form or Stats code	
Description	Displays the Form or Stats description for each corresponding Stockitem Form or Stats code	
Type of Loan (D,H)	Displays whether the Loan is a Daily or Hourly type Loan	D/H
Can Loan?	Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?	Y/N
Loan Charges	A charge which is applied when an item is loaned.	\$ Value
Can Renew?	Determines whether borrowers can renew items of this type.	Y/N
Renew Charge	A charge which is applied when an item is renewed.	\$ Value
Can Reserve?	Determines whether borrowers can make or request reservations for this type of item.	Y/N
Res Charge	A charge which is applied when an item is reserved.	\$ Value

Fines Tab

The fields in this window include:

COLUMN NAME	EXPLANATION	ENTRY
Code	Displays the Form/Stats code for each corresponding Stockitem Form or Stats code	Code is displayed
Description	Displays the Form or Stats description for each corresponding Stockitem Form or Stats code	Description is displayed
Type of Loan (D,H)	Displays whether the Loan is a Daily or Hourly type Loan	D/H
Can Loan?	Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?	Y/N
Late per hour	A charge per hour which is applied when an item is returned late	\$ Value
Late per day	A charge per day which is applied when an item is returned late.	\$ Value
Late per week	A charge per week which is applied when an item is returned late.	\$ Value
Max Overdue Charge	The maximum charge that will be raised for a fine for any one particular late return. If set to \$0.00 Amlib will calculate the overdue charge to the value of the Stockitem	\$ Value

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ILL Records

Stockitem Default

These are the Defaults entries that will be inserted into the Stockitem when an ILL record is created. These Defaults entries can be altered at any time and saved by pressing the **F6UpdDef** button.

Field	Default	Example
Form	The Form code that will be entered into Stockitem for ILLs. Ensure this code is defined in Stockitem module in Application > StockitemForm	ILL
Stats	The Stats code that will be entered into Stockitem for ILLs. Ensure this code is defined in Stockitem module in Application > StockitemStats	AF
Source	The Source code that will be entered into Stockitem for ILLs. Ensure this code is defined in Stockitem module in Application > StockitemOrgin	DDO
Loan Type	The Loan Type code that will be entered into Stockitem for ILLs. The Loan Type will override normal Loan periods set for the Form. Ensure this code is defined in Stockitem module in Application > StockLoan Type	ILL Loan Type loan for 6 weeks
Opac?	Show in Opac? Y/N	N
Alert?	Alert Operator? Y/N Usually links to the Process. If the ILL fields are filled in at the bottom of the Stockitem screen (ILL Library, ILL Renew, ILL Due) an alert will be displayed on the screen. If the Alert? Field is set to Y, two alerts will be shown	N
Perm Locn	If ticked the Supplying Library will display in the Permanent	

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	Location Field on the Stockitem	
Temp Locn	If ticked the Supplying Library will display in the Temporary Location Field on the Stockitem	
Patron Req'd	If set to Y, the Borrower field must be entered before the ILL is Inserted. If set to N, the Borrower field is optional. A reserve is automatically placed for a Borrower if entered in the Borrower Field	Y

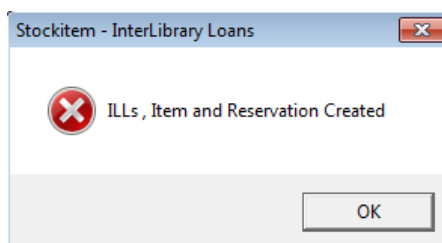
Creating ILL Records

1. Launch the Amlib Client
2. Go to **Main > Stockitem> Stockitem**
3. From the Stockitem menu select, **Item > ILLS** – the InterLibrary Loans screen will display
4. Enter the details of the Inter Library Loan:

Item	Form	Stats.	Source	LoanType	Opac	Alert Oper	PermLocn	TempLocn	Patron Req'd
Create Defaults	BK	ILL			N	Y	<input checked="" type="checkbox"/> Supplier	<input type="checkbox"/> Supplier	

Note:

- When entering the Supplying Libraries as entered in the StockExternalLibs screen. Enter a Full Stop into the field and press the **<TAB>** key on your keyboard. A list of Supplying Libraries will be displayed.
 - When entering a Borrower who requested the item and the borrower barcode is not known at the time click the **Borrower** button, the Borrower Enquiry screen.
 - The Form & Stats code must be filled in. By default
5. Once all the required detail for the ILL has been entered press the **F2Insert** button, a message will display informing the ILL record has been created

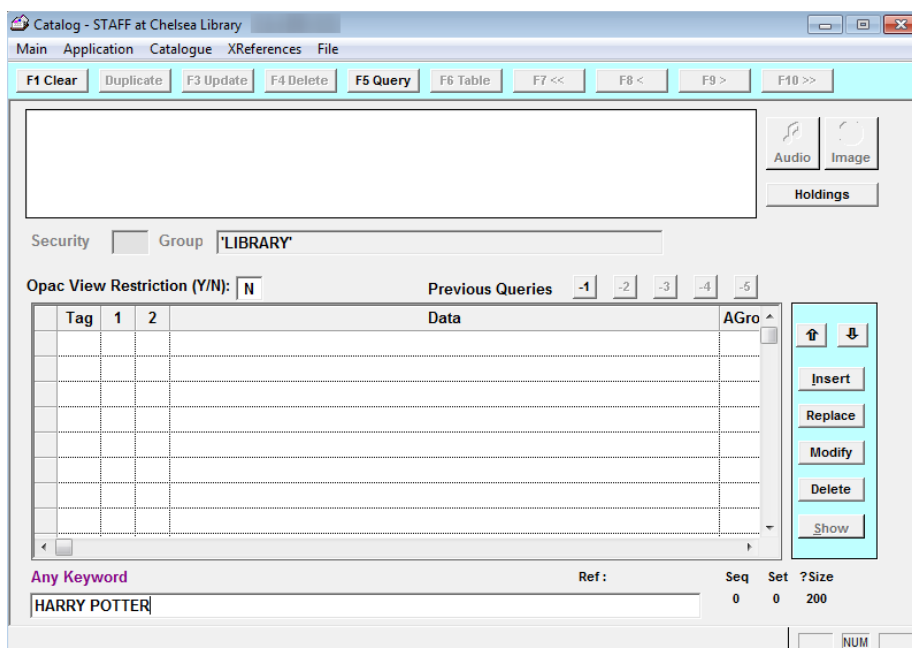


Creating ILL Records from an Existing Catalogue Entry

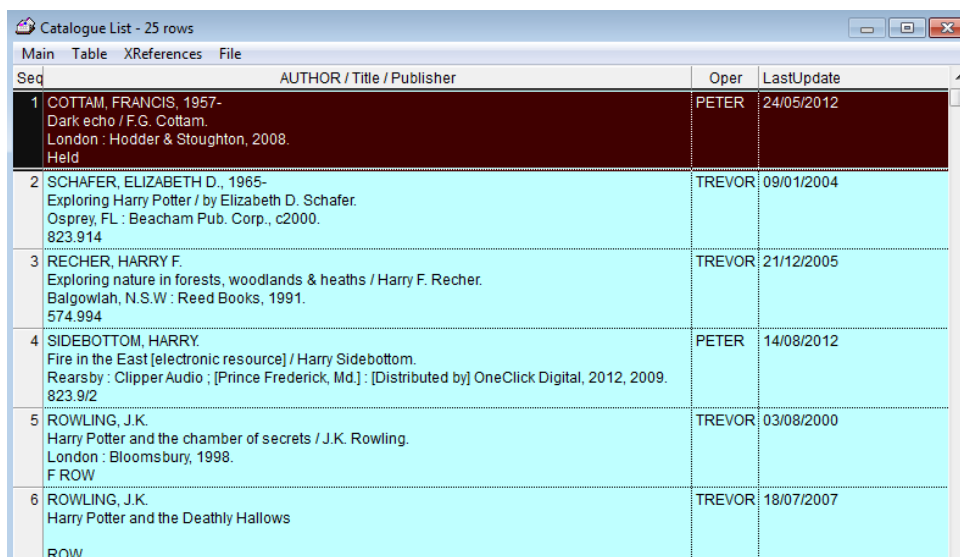
ILL records can be created from catalogue entries that already exist by cross referencing from the catalogue module. This will also automatically fill in certain fields in the ILL screen.

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1. Launch the Amlib Client
2. Go to **Main > Catalogue > Catalogue** – the Catalog screen will display:

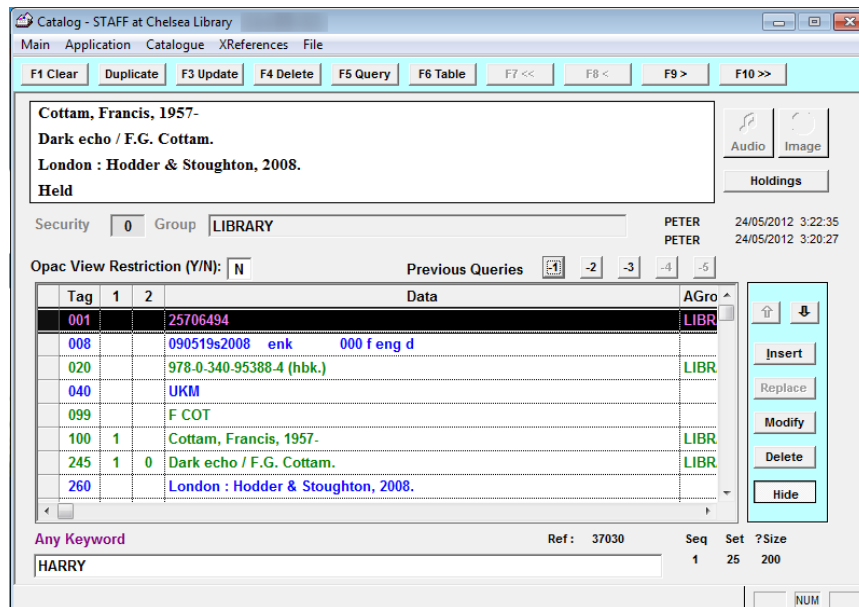


3. Type all or some of the Catalogue entry – for example: part of a title
4. Click the **F5Query** button
5. If a Query option has not been previously been chosen, the Query Options listing will display
6. Double- click on the desired Query option (or highlight the line and select the **<Enter>** button)
7. When more than one record is found, the search result are shown in a Catalogue List

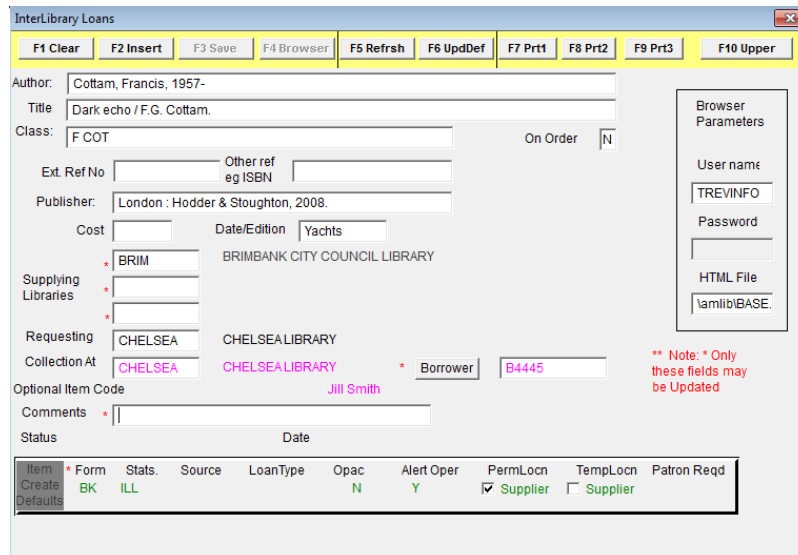


8. Double-click the line with the correct catalogue wishing to view, or highlight the line and select the **<Enter>** button. The selected Catalogue record is displayed:

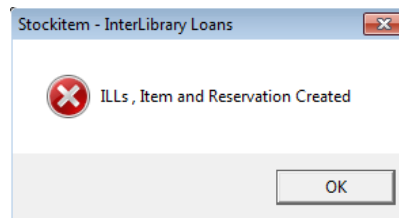
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- From the Catalogue menu select, **XReference > CreateILL** – the InterLibrary Loans screen will display with the some of the data fields filled in:



- Once all the required detail for the ILL has been entered press the **F2Insert** button,
- A message will display informing the ILL record has been created, click the **OK** button



Note: If a borrower has requested an ILL and it has been entered in the Inter Library Loans window, upon pressing the **F2Insert** button a reservation is automatically placed against the requesting borrower.

- A stockitem has now been generated, and the stock item number and creation date for this ILL is shown:

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Requesting: CHELSEA CHELSEALIBRARY
Collection At: CHELSEA CHELSEALIBRARY * Borrower: B4445
Optional Item Code: ILLS1000046725 Jill Smith
Comments:
Status:
Date: 18/10/2012 10:21:48 AM 18/10/2012

Item	* Form	Stats.	Source	LoanType	Opac	Alert Oper	PermLocn	TempLocn	Patron Reqd
Create Defaults	BK	ILL			N	Y	<input checked="" type="checkbox"/> Supplier	<input type="checkbox"/> Supplier	

Type of stockitem ie BOOK, CASSETTE

**** Note: * Only these fields may be Updated**

13. Press the **F5Refresh** button to change the status of the ILL to 'NEW'. This status is relevant for reporting purposes.

Status: NEW
Date: 18/10/2012 10:21:48 AM 18/10/2012 STAFF

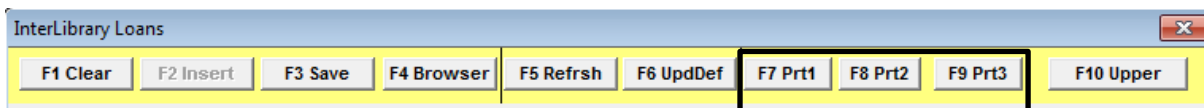
Item	* Form	Stats.	Source	LoanType	Opac	Alert Oper	PermLocn	TempLocn	Patron Reqd
Create Defaults	BK	ILL			N	Y	<input checked="" type="checkbox"/> Supplier	<input type="checkbox"/> Supplier	

14. Click the [x] button to exit out of the Inter Library Loan window. The stockitem will then display. The item may be further modified and/or reserved using normal processing.

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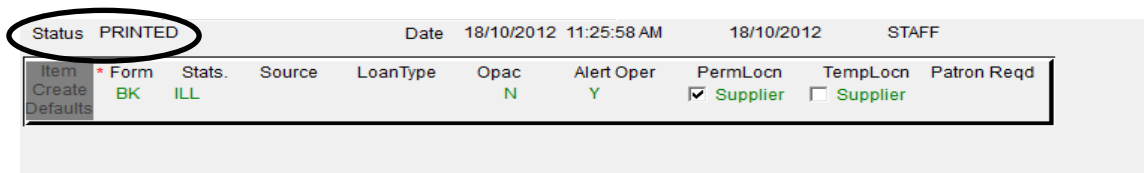
Printing ILL Reports

Once an ILL record is created and you wish to print a request form to be sent to the Supplying libraries this can be done directly from the Inter Library Loan window using the **F7Prt1**, **F8Prt2** or **F9Prt3** buttons.



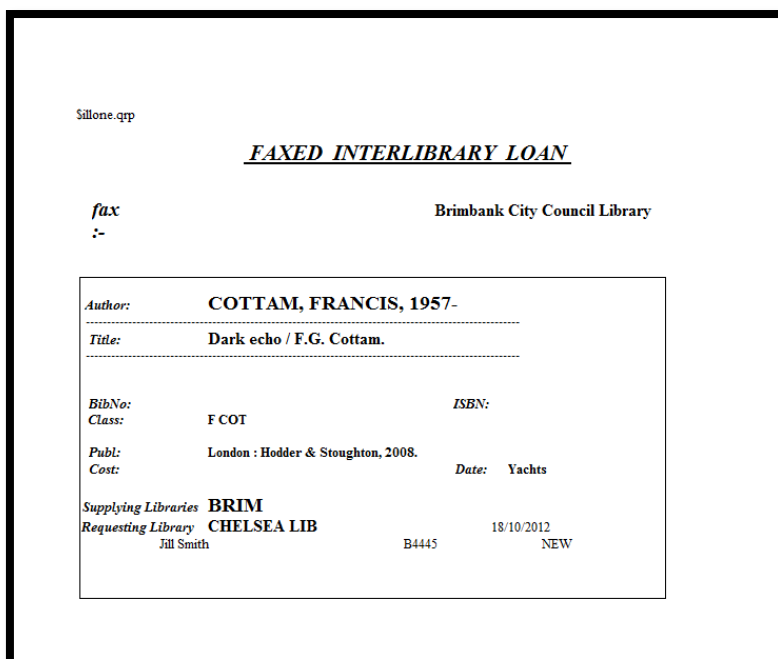
Note: Alternatively, many libraries send the ILL requests in bulk, this can be done from the Reporting module in, **Main> Reports> RepILLS**

Once the requests has been previewed and printed, the ILL Status will change from NEW to PRINTED.

A screenshot of a table showing ILL record details. The 'Status' column contains the word 'PRINTED', which is circled in red. Other columns include 'Date', 'Item', 'Form', 'Stats.', 'Source', 'LoanType', 'Opac', 'Alert Oper', 'PermLocn', 'TempLocn', and 'Patron Reqd'.

Status	PRINTED	Date	18/10/2012 11:25:58 AM	18/10/2012	STAFF				
Item	* Form	Stats.	Source	LoanType	Opac	Alert Oper	PermLocn	TempLocn	Patron Reqd
Create Defaults	BK	ILL			N	Y	<input checked="" type="checkbox"/> Supplier	<input type="checkbox"/> Supplier	

- **F7 Prt1** A print format to send requests to Supplying libraries (e.g. if the Library does not use the Online Process). This report uses Template \$illone.qrp



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- **F8 Prt2** A print format to send requests to Supplying libraries (e.g. if the Library does not use the Online Process). The Report Template is **\$illtwo.qrp**.

\$illtwo.qrp

FAXED INTERLIBRARY LOAN

fax :- Brimbank City Council Library

Author: **COTTAM, FRANCIS, 1957-**

Title: **Dark echo / F.G. Cottam.**

BibNo: **F COT** *ISBN:*

BarCode: **ILLS100004**

Class: **F COT**

Publ: **London : Hodder & Stoughton, 2008.** *Date:* **Yachts**

Cost:

Supplying Libraries **BRIM**

Requesting Library **CHELSE**

For our Member *Our Status*

B4445 Jill Smith PRINTED 18/10/2012

- **F9 Prt3** A print format (with 4 copies of the ILL slip) to send requests to Supplying libraries (e.g. if the Library does not use the Online Process). The Report Template is **\$illthre.qrp**.

\$illthre.qrp

Brimbank City Council Library
RE: INTERLIBRARY LOAN REQUEST
fax :-
DATE 18/10/2012

<p><i>Author:</i> COTTAM, FRANCIS, 1957-</p> <p><i>Title:</i> Dark echo / F.G. Cottam.</p> <p><i>BibNo:</i> F COT <i>ISBN:</i></p> <p><i>Publ:</i> London : Hodder & Stoughton, 2008.</p> <p><i>Cost:</i> <i>Date:</i> Yachts</p> <p><i>Supplying Libraries:</i> BRIM</p> <p><i>Requesting Library:</i> CHELSEA LI</p> <p><i>For our Member</i> B4445 Jill Smith 18/10/2012</p>	<p><i>Author:</i> COTTAM, FRANCIS, 1957-</p> <p><i>Title:</i> Dark echo / F.G. Cottam.</p> <p><i>BibNo:</i> F COT <i>ISBN:</i></p> <p><i>Publ:</i> London : Hodder & Stoughton, 2008.</p> <p><i>Cost:</i> <i>Date:</i> Yachts</p> <p><i>Supplying Libraries:</i> BRIM</p> <p><i>Requesting Library:</i> CHELSEA LI</p> <p><i>For our Member</i> B4445 Jill Smith 18/10/2012</p>
<p><i>Author:</i> COTTAM, FRANCIS, 1957-</p> <p><i>Title:</i> Dark echo / F.G. Cottam.</p> <p><i>BibNo:</i> F COT <i>ISBN:</i></p> <p><i>Publ:</i> London : Hodder & Stoughton, 2008.</p> <p><i>Cost:</i> <i>Date:</i> Yachts</p> <p><i>Supplying Libraries:</i> BRIM</p> <p><i>Requesting Library:</i> CHELSEA LI</p> <p><i>For our Member</i> B4445</p>	<p><i>Author:</i> COTTAM, FRANCIS, 1957-</p> <p><i>Title:</i> Dark echo / F.G. Cottam.</p> <p><i>BibNo:</i> F COT <i>ISBN:</i></p> <p><i>Publ:</i> London : Hodder & Stoughton, 2008.</p> <p><i>Cost:</i> <i>Date:</i> Yachts</p> <p><i>Supplying Libraries:</i> BRIM</p> <p><i>Requesting Library:</i> CHELSEA LI</p> <p><i>For our Member</i> B4445</p>

Inter Library Loan Manual

RECEIPT OF AN INTER LIBRARY LOAN ITEM

When an ILL is received from the supplying library the ILL stockitem record can be updated with the required details.

ILL records may be found using the Stockitem, or using a StockitemWhere search in **Main>Stockitem>StockitemWhere**.

Once the item has been located, the temporary stockitem number can be changed to match the barcode on the actual item. And other details can be entered such as:

- ILL Library
- ILL Renewal
- ILL Due

The screenshot shows the 'Stockitem - STAFF at Chelsea Library (Live DB v5.3)' application window. The interface includes a menu bar (Main, Application, Item, XReferences, File) and a toolbar with function keys (F1-F10). The main area displays the following information:

- Item No:** 989798 (highlighted with a red box)
- Cat Ref No:** 37030
- Title:** Dark echo / F.G. Cottam.
- Author:** Cottam, Francis, 1957-
- Subject:** London : Hodder & Stoughton, 2008.
- Call Number:** F COT
- Location:** Perm BRIM, Temp CHELSEA
- For Loan (Y/N):** Y
- Received:** 18/10/2012 (highlighted with a red box)
- Group:** LIBRARY
- ILL Library:** BRIM
- ILL Ren:** Y
- ILL Due:** 15/11/2012 (highlighted with a red box)
- ITEM TYPE:** N
- MEMOS:** 0

At the bottom, there is a table with columns: On Loan, Due, On Order, Res, Seq, Set, ?Size. The data row shows: On Loan N, Due, On Order N, Res 1, Seq 1, Set 10, ?Size 200. The 'Last Modified' field shows '18/10/2012 10:30:45 AM by STAFF' and 'Issues 0'.

Inter Library Loan Manual

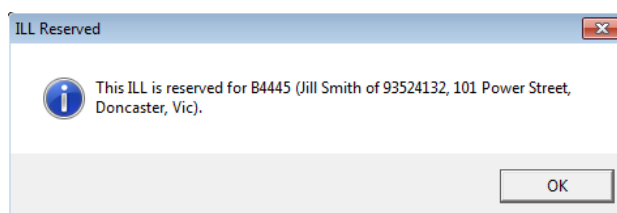
Editing & Updating Received ILL Items

In this example the received ILL will be located using a StockitemWhere search.

1. Launch the Amlib Client
2. Go to **Main > Stockitem > StockitemWhere** – the Stockitem Where Search will display
3. The statement must include:
 - a. **Item No LIKE ILL** (this will include all stockitem number that begin with ILL)
4. Press the **F5Query** button, if prompted to use a Saved file click **NO** - the Stockitem List window will display
5. Highlight & double-click the received ILL stockitem – the Stockitem screen will display
6. Edit & Update the following information as required:
 - **Item No** – Is changed to the real barcode when the item is received
 - **ILL Library** – Library that supplied the stockitem. Place a full stop [.] into the field and press the <TAB> key on keyboard to bring a list of External Libraries
 - **ILL Renewal** – Is a renewal allowed? Enter either (Y)es or (N)o
 - **ILL Due** – Due date for the stockitem. Click the field and press the <TAB> key on keyboard this will make the date due in 1 month

ILL Library: BRIM	ILL Ren: Y	ILL Due: 15/11/2012	ITEM TYPE: N	MEMOS: 0
On Loan <input checked="" type="checkbox"/>	Due	On Order <input checked="" type="checkbox"/>	Res 1	Seq 1 Set 10 ?Size 200
Last Modified 18/10/2012 10:30:45 AM	by STAFF	Issues 0		
Current Cost of Item (refer item history for original cost)				
NUM				

7. Once all the details have been updated, press the **F3Update** button.
If a reservation was placed against this item, a message will be displayed of the borrower:



A memo will also be automatically placed against the Borrower records:

Memos for this Borrower											
F1 New		F2 Insert		F3 Save		F4 Delete		F5 Query		F7 Print	
Barcode	B4445	Name	Smith, Jill			Number of Memos:	4				
Show	Date	End Date	Type	Memo Details		stk Item no if applic					
Y	18/10/2012	04/03/2040	RESRET	Reserved ILL Item 089879 Dark echo / F.G. Cottam. has been received at location CHELSEA		089879					

PROCESSING ILL ITEMS

Reservation Notices

Reservation notices can be sent out to notify patrons that ILL items are awaiting collection.

Reservation Report Templates

- **&RESLIST.QRP** – Reservation List (Full Details)
- **&RESBRF.QRP** – Reservation List (Brief Details)
- **&RESBRFC.QRP** – Reservation List by Class (Brief Details)
- **&RESBRFG.QRP** – Reservation List by Group (Brief Details)
- **&RESMAIL.QRP** – Reservation Notice (Letter)*
- **&RESEML.QRP** – Reservation Notice (Email)*
- **&RESSMS.QRP** – Reservation Notice (SMS)*
- **&RAX4010.QRP** – Reservation book slips

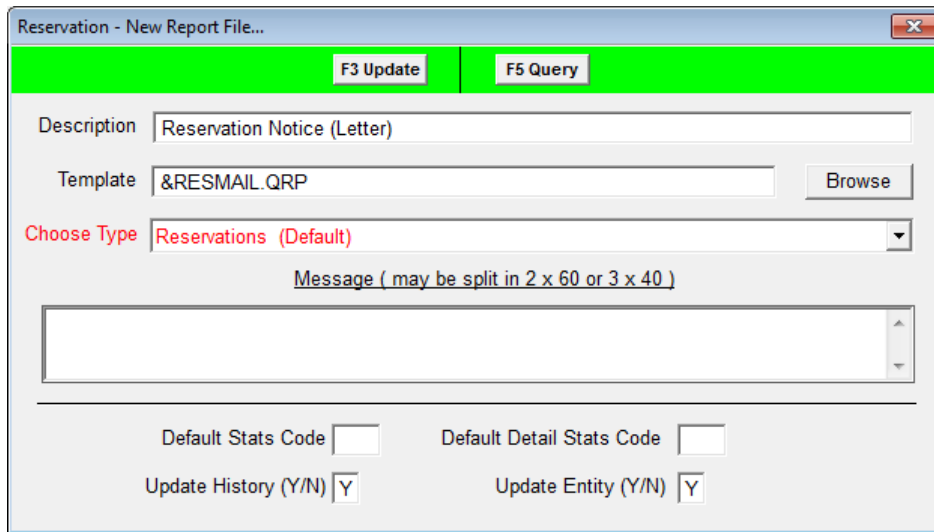
Load the Template

1. Launch the *Amlib* client
2. Go to **Main > Reports > RepAddNew** – the Report Files screen will display
3. From the Report Entity drop-down, select **Reservation**
4. Click the **F1 New** button – the Reservation Reports – New Report File screen will display
5. Type in a Description – for example: **Reservation Notice (Letter)**
6. Browse to the **Amlib/Reports** folder on your *Amlib* Server and locate the template to be loaded (if the template has been loaded onto your PC – then navigate to the local folder)
7. If loading an unmodified template, change the Files of type drop-down to: **System Report Templates (&.qrp)**
8. **Highlight** the template to be loaded and click on the **Open** button
9. Choose Type – there are several types to select depending on the template being loaded (the type is important as it determines the type of data that is sent to each particular notice):
 - **Reservations (Default)**
 - Use for: **&RESBRF.QRP, &RESBRFC.QRP, &RESBRFG.QRP, &RESMAIL.QRP** and **&RAX4010.QRP**
 - **- Email**
 - Use for: **&RESEML.QRP**
 - **Unlimited Reservation Format**
 - Use for: **&RESLIST.QRP** and **&RESSMS.QRP**
10. You can leave Default Stats Code and Default Details Stats Code blank
11. Update History (Y/N) = Y
12. Update Entity (Y/N) = Y

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13. Click on the **F3 Update** button
14. Close out of the Report Files window

The template is now loaded and available for use in a Report.



Reservation - New Report File...

F3 Update F5 Query

Description Reservation Notice (Letter)

Template &RESMAIL.QRP Browse

Choose Type Reservations (Default)

Message (may be split in 2 x 60 or 3 x 40)

Default Stats Code Default Detail Stats Code

Update History (Y/N) Update Entity (Y/N)

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Reservation Statuses

When an item is placed on reserve, a **Reservation Status** is placed against that item. The status is important as the reports use this status as a determinant for what to print and what not to.

STATUS	EXPLANATION
ISSUE	Item was on loan when reserved (reserve placed via <i>Amlib</i> client)
ON LOAN	Item was on loan when reserved (reserve placed via <i>Opacs</i>)
SHELF	Item was on shelf (available) when reserved
RETURN	Item has been returned AFTER reservation placed
TRANSFER	Item was on transfer when reserved
ORDER	Item was on order when reserved
READY	Reservation on item has been CANCELLED through an expiry report and is now ready for the next reader
PRINTED	Item was included in a <i>scheduled</i> Reservation report with <u>Update Res Status</u> = Y

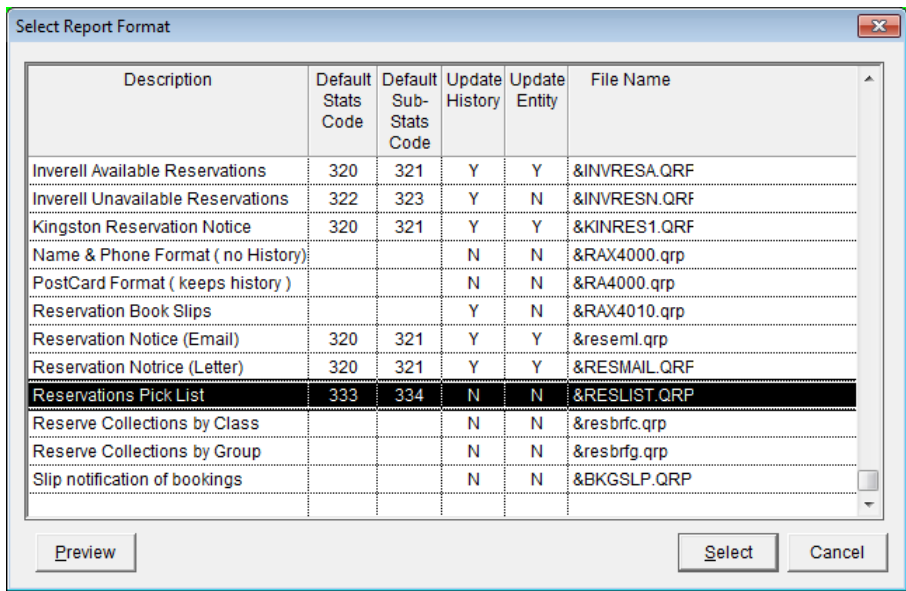
Setting Up the Report: Pick-Up List

If you allow reservations to be placed on items that are **ON SHELF** (available) at the time of the reservation, then you will need to create and run a report that will create a pick-up list to collect these items

Create Report

1. Launch the *Amlib* client
2. Go to **Main > Reports > RepReservation-** the Reservation Reports screen will display
3. Click the **F1 NEW** button – the Select Report Format screen will display
4. Highlight Reservation Pick List (wording may differ – it will be using the **&RESLIST.QRP** print template) and click the **Select** button

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5. Type in a Report Description – for example: **Reservations Pick List**
6. Create Hist (Y/N) = **N**
7. Update Res Status = **N**
8. Click the **F3 Save** button

333	334	N	N	Reservations Pick List	Reservations Pick List	&RESLIST.QRF
-----	-----	---	---	------------------------	------------------------	--------------

Inter Library Loan Manual

Where Statement

1. Select the report from the list and click the **F7 Where** button – the Reservation Reports – Where screen will display
2. The statement **must** include the following settings:
 - **Only Show First in Queue (Y/N) = Y** (otherwise ALL reserves on an item will show)
 - **Res Item Status IN SHELF,READY** (this will pick up any available or recently expired reservation items)
 - **On Loan (Y/N) = N**
 - (Optional) **Item Perm Loc =** (enter your location code) – for example: **Item Perm Loc = CHELSEA** (where multiple locations available)
 - (Optional) **Process IS NULL** (paste without putting a value in 3 – this will exclude any items in Processing, Binding, Missing, etc)
 - (Optional) **Is on Order (Y/N) = N** (this will exclude any items on order)
3. Click the **F3 Save** button when complete

Reservation Reports - Where

F3 Save F5 Query

1 Choose Search Column

2 Choose Operator

3 Type the WHERE Condition and Press PASTE OR Press SPECIAL

N

() Optional Multiple Brackets

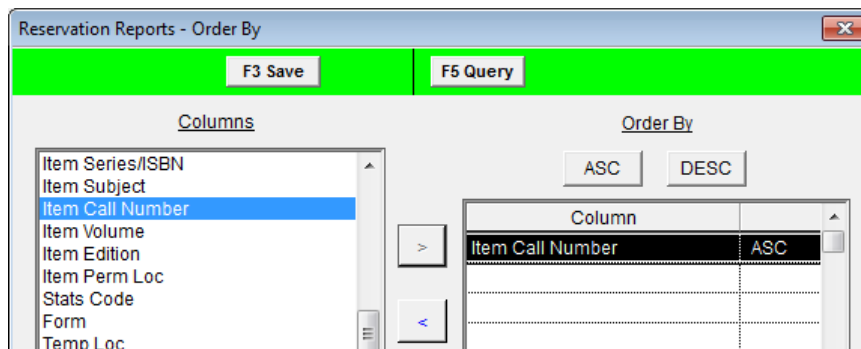
(	Column	Oper	Where)
	Only Show First in Queue	=	Y	AND
	Res Item Status	IN	SHELF,READY	AND
	On Loan (Y/N)	=	N	AND
	Item Perm Loc	=	CHELSEA	AND
	Process	IS	NULL	AND
	Is On Order (Y/N)	=	N	

Paste Special AND OR Delete

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Order

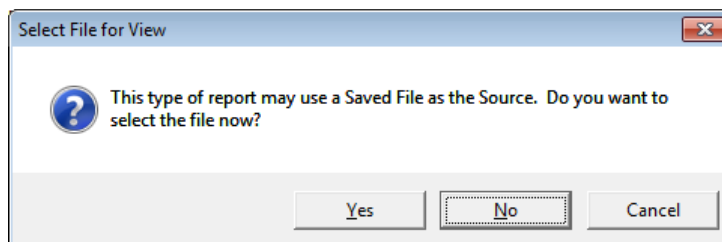
1. Highlight the report from the list and click on the **F9 Order** button – the Reservation Reports – Order By screen will display:



2. Use the arrow keys to select fields to Order By – for example: **Item Call Number**
3. Click the **F3 Save** button

Print

1. Highlight the report from the list and click the **F8 View** button – the Select File for View prompt will display with the following message: **This type of report may use a Saved File as the Source. Do you want to select the file now?**



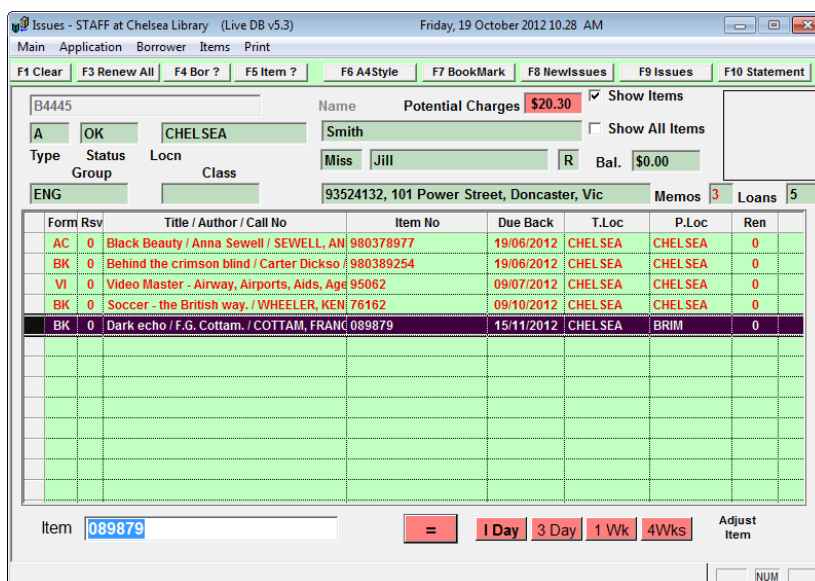
2. Click the **No** button
3. The Report – View screen will display with a list of the items
4. Click the **print** button to print the list

Please Note: No notices will be generated to patrons nor will the Reservation Status of the item be altered.

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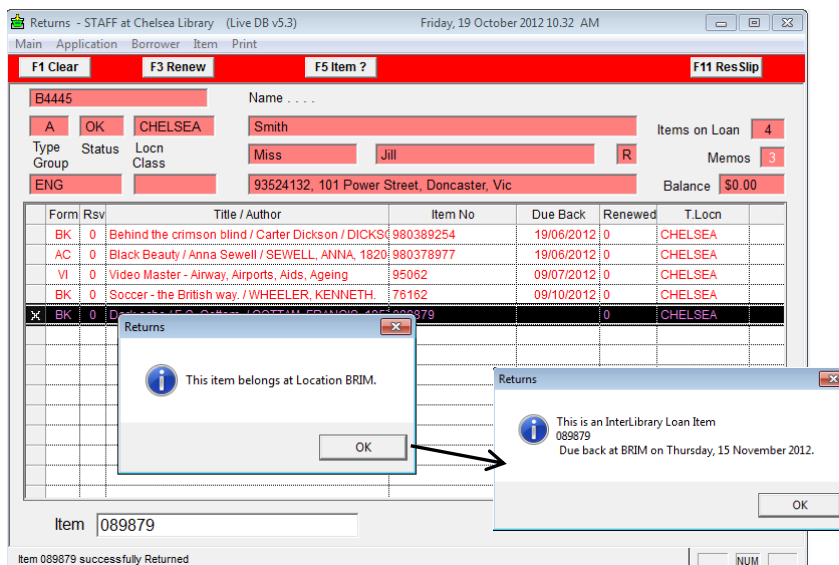
Issue ILL Items

ILL items are issued to Borrowers using usual circulation methods. The due dates of ILL items are determined from the items form type, or the date set in the stockitem 'ILL Due' field or whichever is the earliest date.



Return of ILL Items

ILL items are returned as usual via the returns module. On return of an ILL item a prompt will be shown indicating the Supplying Library and the Due Date of date of the item.



Delete ILL Stockitem Records

Once ILL items have been returned to the supplying library the temporary stockitem record can be deleted from the Stockitem module.

1. Launch the Amlib Client
2. Go to **Main > Stockitem> Stockitem** - the Stockitem screen will display
3. Enter the stockitem number into the 'Item No' field and press the **F5Query** button

Stockitem - STAFF at Chelsea Library (Live DB v5.3)

Main Application Item XReferences File

F1 Clear F2 Insert F3 Update F4 Delete F5 Query F6 Table F7 << F8 < F9 > F10 >>

Item No 089879 Cat Ref No 37030

Query Via
 Item Cat Keyword Any

Previous Queries -1 -2 -3 -4 -5

Title Dark echo / F.G. Cottam.
Author Cottam, Francis, 1957-
Publisher
Series/ISBN Vol Ed Yachts
Subject London : Hodder & Stoughton, 2008.
Call Number F COT Sts Code ILL Form BK Call Set
Description Copy No / Convert
Location Perm BRIM Temp CHELSEA Floor Origin/Source
For Loan (Y/N) Y Loan Type Opac? N Alert Y Process
Received 18/10/2012 < = > Accessioned Current Cost
Group
ILL Library: BRIM ILL Ren: Y ILL Due: 15/11/2012 ITEM TYPE: N MEMOS: 0
On Loan N Due On Order N Res 0 Seq Set ?Size
1 1 200
Last Modified 18/10/2012 3:13:51 PM by STAFF Issues 1
Subject NUM

4. To delete the ILL stockitem record press the **F4Delete** button
5. A prompt will display to confirm deletion of stockitem, press the **YES** button. The corresponding ILL record is now deleted

Inter Library Loan Manual

ISSUING ITEMS TO EXTERNAL LIBRARIES

Generally to issue items to external libraries a new borrower record is created within Amlib. A borrower type of Inter Library Loan will also need to be created so that Loan parameters can be set.

Alternatively one general borrower of Inter Library Loan could be created with the individual library loan information retained elsewhere or by adding a memo to the stockitem when loaned. In the below example a Inter Library Loan Borrower Type & Loan parameter will be setup.

Setting Up Borrower Types

1. Launch the Amlib Client
2. Go to **Main > Borrower > BorrowerType** - the Borrower Types screen will display
3. Click the **F1New** button to insert a new borrower type, and enter the appropriate details:

Column	Description	Example
Type	Code for Borrower Type	I
Description	Description of Borrower Type	Interlibrary Loan
Keep Bor History (Y/N)	History of past reading records is kept for borrowers until deleted, if a Y is entered in this column. The system will notify the operator if an item has been borrowed previously and how many days ago. If the Borrower history is not kept, the system still keeps Stockitem history so the items that a person has borrowed can still be checked.	Y
Include in Stats (Y/N)	Statistics can be recorded to the hour, day, month or year depending upon the settings in Supervisor, StatsParams for the Borrower Types that have a Y set in this column.	Y
Max Item on Loan	Sets the total number of items on loan. Specific privileges based on form or stats codes of the items are set by selecting Loans [F7] .	100
Return By Date	Sets the return by date of items on loan.	31/12/2012
Age >=	When a new borrower is created the system will assign the appropriate borrower type parameter depending on age if an entry is added within these fields. This is useful for creating Junior members in Public Libraries.	18
Age <=	When a new borrower is created the system will assign the appropriate borrower type parameter depending on age if an entry is added within these fields. This is useful for creating Junior members in Public Libraries.	100
Exp Days	The number of days for expiry for this Borrower Type. Once a borrower has expired they would need to Reregister before allowing activity on the system. The Supervisor, Installation, Borrower parameters would need to be set to M or D for the above to be effective.	999

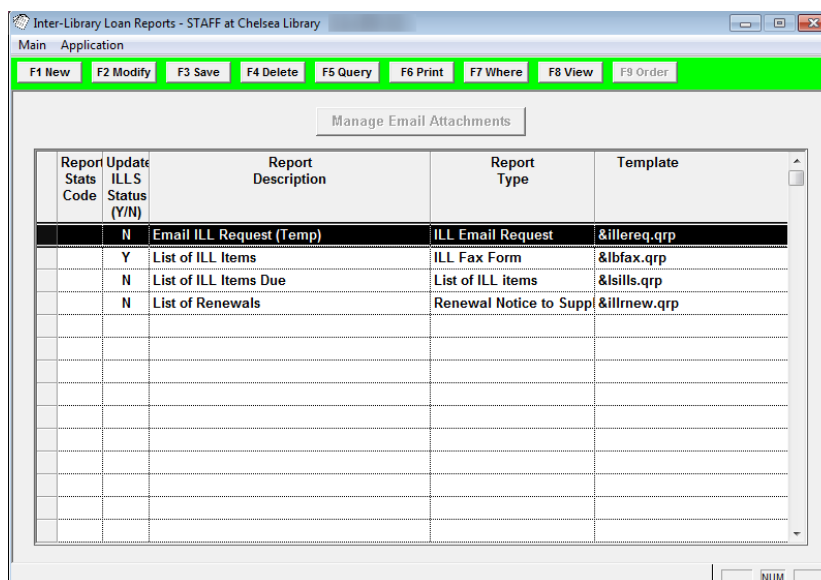
4. Press the **F3Save** button to save entered details
5. Highlight the newly created borrower type and press the **F7Loan** button – the Loan Parameters and Borrower Type screen will display
6. Adjust the Loan Parameter as needed for this borrower type. See [Setting Loan Parameters](#) section for further instructions on how to set this up
7. Press the **F3Save** button to save entered details

Inter Library Loan Manual

REPORTS

Inter Library Loans reports are accessed from the report module.

1. Launch the *Amlib* client
2. Go to **Main > Reports > RepILLS** – the Inter Library Loans Reports screen will display:



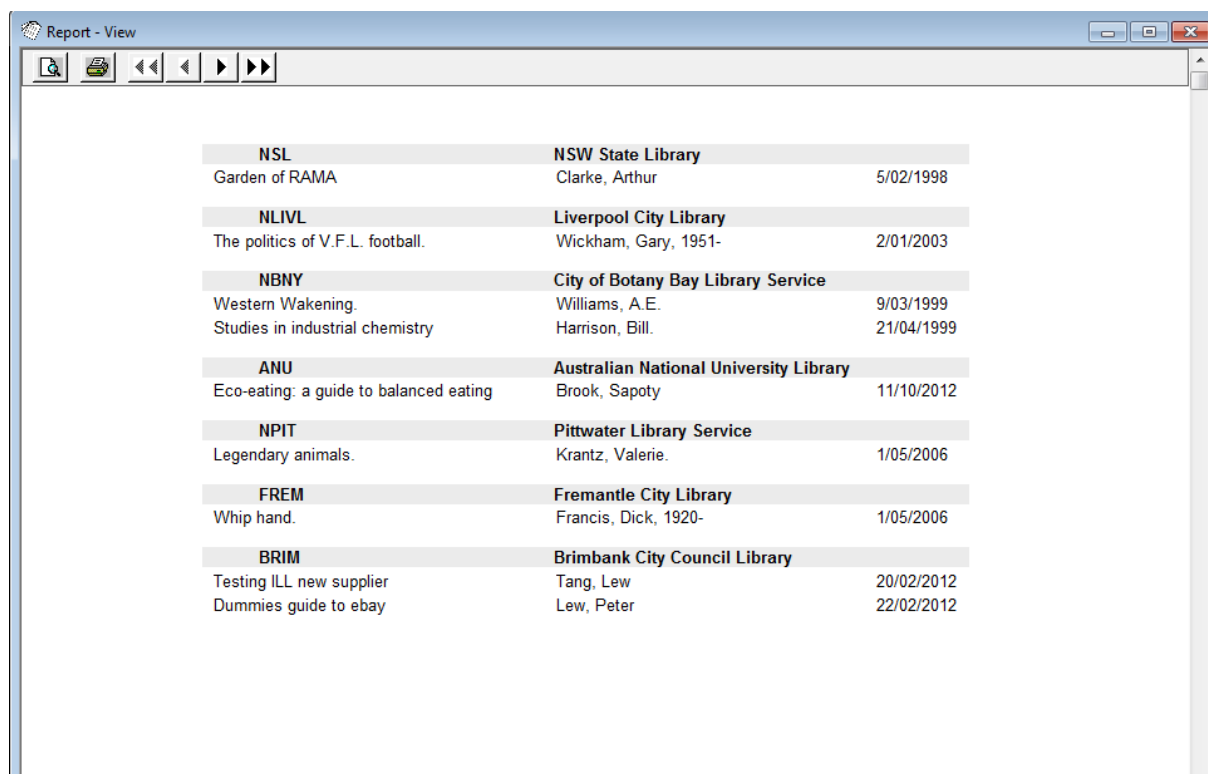
Below is a table containing a list of the available report that can be setup in RepILLS:

TEMPLATE	DESCRIPTION	REPORT TYPE
&ILLLET.QRP	Interlibrary Loan letter	Default
&ILLRNEW.QRP	List of ILL items that have been renewed	Default
&ILLEREM.QRP	ILL reminder notice (email) to first supplying library only	E-Mail Request
&ILLREQ.QRP	ILL request (email) to first supplying library only	E-Mail Request
&ILLERMS.QRP	ILL reminder notice (email) to all supplying libraries	E-Mail Request to all suppliers
&ILLERQS.QRP	ILL request via Email to all supplying libraries	E-Mail Request to all suppliers
&ILLREM.QRP	ILL Reminder to supplying library	Default
&ILLRNW.QRP	ILL renewal request to supplying library	Default
&ILLST.QRP	ILL listing of ILL stockitems	Default
&LBFAX.QRP	Interlibrary Loan fax	Default
&LBFAXA.QRP	Interlibrary Loan fax – varying format	Default
&LSILLS.QRP	List of ILL items	Default

Sample ILL Reports

Inter Library Loans not Received

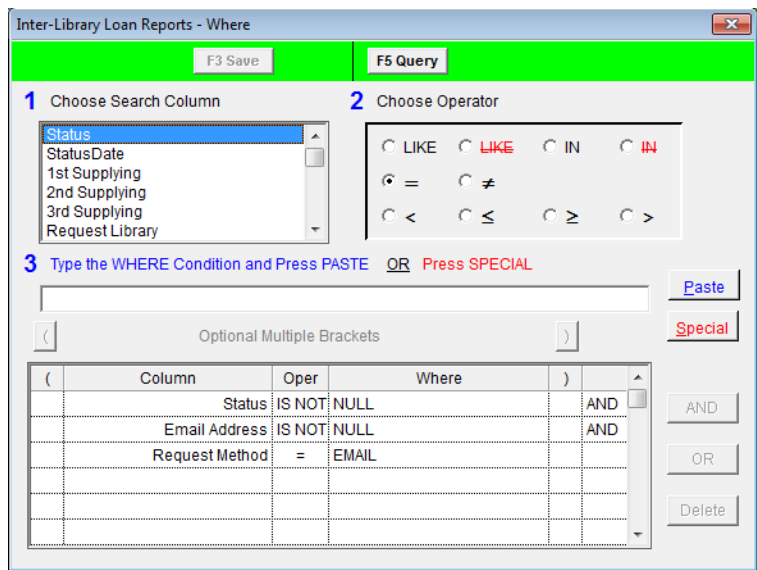
1. Click on the **F1New** button and highlight a Template – for example: ILL listing of ILL stockitems (**&ILLST.QRP**)
2. Click the **Select** button – the new Report will appear in the table
3. Type in a Report Description and click the **F3Save** button
4. Highlight this report and click on the F7Where button – the Inter-Library Loan Reports – Where screen will display
5. Enter the following Where statement
 - a. **ItemNo LIKE ILL**
6. Click the **F3Save** button when complete
7. Click the **F8View** button to see a list on the screen (which can be printed using the **print** icon) or **F6 Print** to print/email the report via the *Scheduler*)



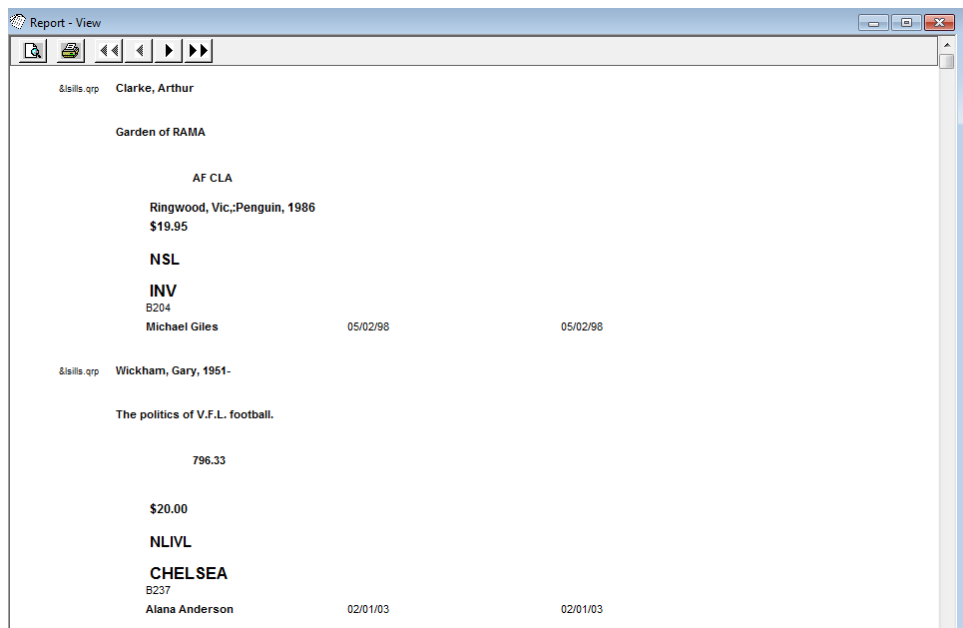
Library	Item	Date
NSL NSW State Library	Garden of RAMA Clarke, Arthur	5/02/1998
NLIVL Liverpool City Library	The politics of V.F.L. football. Wickham, Gary, 1951-	2/01/2003
NBNY City of Botany Bay Library Service	Western Wakening. Williams, A.E. Studies in industrial chemistry Harrison, Bill.	9/03/1999 21/04/1999
ANU Australian National University Library	Eco-eating: a guide to balanced eating Brook, Sapoty	11/10/2012
NPIT Pittwater Library Service	Legendary animals. Krantz, Valerie.	1/05/2006
FREM Fremantle City Library	Whip hand. Francis, Dick, 1920-	1/05/2006
BRIM Brimbank City Council Library	Testing ILL new supplier Tang, Lew Dummies guide to ebay Lew, Peter	20/02/2012 22/02/2012

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Inter Library Loan Reminder Notice via Email (&ILLREM.QRP)



List of Inter Library Loans – Full Details (&ISILLS.QRP)



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Fax Form for Sending Inter Library Loans, Bulk Form (&ILBFAX.QRP)

INTERLIBRARY LOAN REQUEST
REQUESTING LIBRARY: INVERNESS RD BRANCH
SUPPLYING LIBRARY: NSW State Library
THIS FORM SENT VIA: BASE HTML
FAX NUMBER: DATE: 22/10/2012 2000

Author:	Clarke, Arthur	ON ORDER ?
Title:	Garden of RAMA	
BRN/No. Class	AF CLA	ISBN:
Publ. Price:	Ringwood, Vic.; Penguin, 1986 \$19.95	Date:
SUPPLYING LIBRARY:	NSL	
REQUESTING LIBRARY:	INVERNESS RD BRANC INTERLIBRARY LOAN	
For Reader:	Michael Giles	B204 05/02/98

Variation to &ILBFAX.QRP – Single Cover Sheet Produced to Include Specific Details (&LBFAXA.QRP)

INTERLIBRARY LOAN REQUEST
REQUESTING LIBRARY: INVERNESS RD BRANCH
SUPPLYING LIBRARY: NSW State Library
THIS FORM SENT VIA: BASE HTML
FAX NUMBER: DATE: 22/10/2012 2000

Author:	Clarke, Arthur	ON ORDER ?
Title:	Garden of RAMA	
BRN/No. Class	AF CLA	ISBN:
Publ. Price:	Ringwood, Vic.; Penguin, 1986 \$19.95	Date:
SUPPLYING LIBRARY:	NSL	
REQUESTING LIBRARY:	INVERNESS RD BRANC	
For Reader:	Michael Giles	B204 05/02/98

Letter Form for Inter Library Loan Requests (&ILLET.QRP)

NSW State Library
Macquarie St
Sydney 2000 22/10/2012

Dear

Could you please supply the following items as requested by our readers

Author / Cost	Title / Class	Bib / ISBN
Clarke, Arthur \$19.95	Garden of RAMA AF CLA	

Inter Library Loan Manual

STATISTICS

Statistics that *Amlib* collects are selected from the Statistics Code table in the *Supervisor* module. The statistics parameter type 94 & 95 are related specifically to Inter Library Loan.

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > StatsParams** – the Statistics Code table will display:

Stat Type	Stats Description	Count (Y/N)	Money (Y/N)	Form (Y/N)	Item Type (Y/N)	Borr (Y/N)	Borr Group (Y/N)	Borr Class (Y/N)	Locn (Y/N)	Suburb (Y/N)	Ward (Y/N)	Area (Y/N)	Year (Y/N)	Month (Y/N)
90	New Items	Y	Y	Y	Y	N	N	N	Y	N	N	N	Y	Y
91	Del. Items	Y	Y	Y	Y	N	N	N	Y	N	N	N	Y	Y
93	Updated Items	Y	N	Y	Y	N	N	N	Y	N	N	N	Y	Y
94	New ILL Items	Y	Y	Y	Y	N	N	N	Y	N	N	N	Y	Y
95	Del ILL Items	Y	Y	Y	Y	N	N	N	Y	N	N	N	Y	Y
96	New Order Items (Received)	Y	N	Y	Y	N	N	N	Y	N	N	N	Y	Y
97	Del Order Items	Y	N	Y	Y	N	N	N	Y	N	N	N	Y	Y
98	New Order Placed	Y	N	Y	Y	N	N	N	Y	N	N	N	Y	Y
100	New Catalogue	Y	N	N	N	N	N	N	Y	N	N	N	Y	Y
101	Del. Cats	Y	N	N	N	N	N	N	Y	N	N	N	Y	Y
103	Updated Cats	Y	N	N	N	N	N	N	Y	N	N	N	Y	Y
110	Cat via MaRC	Y	N	N	N	N	N	N	Y	N	N	N	Y	Y
111	Items via MaRC	Y	Y	N	N	N	N	N	Y	N	N	N	Y	Y
112	Orders via MaRC	Y	Y	N	N	N	N	N	Y	N	N	N	Y	Y
113	Auths via MaRC	Y	N	N	N	N	N	N	Y	N	N	N	Y	Y

Note: If statistics parameter 94 & 95 for Inter Library Loans has not yet been setup – please download the [Statistics Parameters](#) guide for further instructions.

Sample ILL Statistics Reports

Outgoing Requests & Incoming Issue Count Over the Last 12month (&STAT530.QRP)

1. Launch the *Amlib* client
2. Go to **Main > Reports > RepStatistics**– the Statistics Reports screen will display
8. Click on the **F1New** button and highlight and select &STAT530.QRP
9. Click the **Select** button – the new Report will appear in the table
10. Type in a Report Description for example: ILL Outgoing / Request in Last 12 Month and click the **F3Save** button
11. Highlight this report and click on the **F7Where** button – the Statistics Reports – Where screen will display
12. Enter the following Where statement:

RepStatistics - Where

F3 Save F5 Query

1 Choose Search Column

2 Choose Operator

3 Type the WHERE Condition and Press PASTE OR Press SPECIAL

Optional Multiple Brackets

(	Column	Oper	Where)	
(	Trans Type (Issue,Ret)	=	5	)	AND
	Borrower Type	=	1	)	OR
(	Trans Date	>=	Current Date - 1 Year	)	AND
	Trans Type (Issue,Ret)	=	94	)	AND
	Trans Date	>=	Current Date - 1 Year)	

AND OR Delete

13. Click the **F3Save** button when complete
14. Click the **F8View** button to see a list on the screen (which can be printed using the **print** icon) or **F6 Print** to print/email the report via the *Scheduler*)

Note: The report is separate into 2 sections, *Outgoing Inter Library Loans* and *Incoming as New Item*, to view sections press the forward button:



Inter Library Loan Manual

Inter Library Loans - Outgoing

ILL Outgoing / Requests in Last 12 Month			
05 - Issues		31/01/2001 to 10/09/2001	
MONTROSE - MONTROSE Branch			
I - Interlibrary loan	AF	Adult Fiction	37
	ANF	Adult Nonfiction	120
	ANFSTA	Adult Nonfiction Stack	2
	CAS	Music Cassette	2
	E	Picture Book	5
	J	Code J not found	7
	JNF	Junior Nonfiction	11
	JPB	Junior Paper Back	1
	JSTA	Junior Fiction Stack	1
	JSW	Junior Spoken Word	1
	JVID	Junior Video	2
	LIT	Literacy	3
	LP	Adult Large Print	5
	PAM	Pamphlets	1
	PB	Adult Paperback	10
	REF	Reference	2
	TB	Adult Talking Book	7
	VID	Video	5
		Total:	222
MONTROSE Branch Total:			222

Inter Library Loans - Incoming

94 - New ILL Items			
		1/06/2004 to 29/11/2004	
MONTROSE - MONTROSE Branch			
* - Code * Not Recorded	ILL	Inter Library Loan	12
		Total:	12
MONTROSE Branch Total:			12
New ILL items Total:			12

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ILL Stockitem Count via StockitemWhere Search

ILL Stockitem Count over last 12 month

1. Launch the *Amlib* client
2. Go to **Main >Stockitem > StockitemWhere** – the Stockitem Where Search screen will display
3. Enter the following Where statement:

Column	Operator	Where	
Sts Code	=	ILL	AND
Received	>=	Current Date - 1 Year	

4. Click the **F6Count** button complete
5. When asked whether to use a saved file, press **NO** - a count of all ILL items will display:

