

ILLiad and RDS Article Delivery - How Do I . . . ?

Libraries with the ILLiad Client and a Scanner
[Alex, Annex, Camden, Chang, Dana, Dglss, Klmr]

1. How do I find new RU article requests that need to be filled from my library's collections?

Log on to the ILLiad client.

Choose [File] – [Document Delivery]

Look for the file or queue of new requests for your library. It will be named “Awaiting [Your Library's Name] Doc Delivery Processing.” If your library file or queue does not appear in the list, it means you have no new requests to process at this time.

2. How do I print a request for stacks searching and prepare the request for stacks searching?

Double-click on your library's queue to see a list of new requests (drag column headers and sort by columns for a better view of the requests).

Double-click on a request to display its “General Request Information” screen.

Select [Process] – [Print Request]. Click [OK]

Select [Change Status To . . .] – [In DD Stack Searching]. “In DD Stack Searching” is a shared queue and will contain other libraries' requests.

When prompted “Are you sure you want to manually change this status?” reply [OK].

Take the printed requests to the stacks and find the journal matching volume/issue/date of the articles requested.

3. How do I scan from a peripheral scanner not attached to the ILLiad PC, and post the articles for patron viewing?

Make a photocopy of the article (or scan directly from print journal if possible). Include the copyright warning statement.

SCAN

Login to the scanner with your auditron number.

Highlight the [Scan] Function button, then [Online].

Touch [Settings] and adjust settings as needed.

Put copies in tray, or volume face down on platen.

Select [Ereserves] or [Scan to U Drive] or whatever folder your scanner maps to on the U Drive. Copies stacked in tray will automatically feed through. To scan page by page, press [Scan More]

After copies feed through machine, or scanning is complete, select [Advance]

Select Format and [TIF] or [TIF Fax]. Press [OK]. Press [NEXT].

On the "Folder Navigation Screen," press [NEXT] again.

In the Name field key enter the request transaction number, e.g. Name: 1469

Press [Send.]

Document will reside in your U drive, ereserve folder along with ereserve documents, or another folder.

Press [Done] –or- [New Document] and proceed to the next document.

IMPORT and DELIVER IMAGE
Login to ILLiad

Select [File] – [Document Delivery]

Select the "DD Stack Searching," queue. Search by request transaction number, or press [Search] in the middle left-hand side of the screen to display of list of requests. In the "Records Selected" area of the screen, select your request.

Be sure the request information for the transaction you're currently working on displays in the "Update Stack Search" area of the screen.

Press [Scan Now] in the lower right hand corner of the Transaction Information screen.

Press [Import Image]

Find the article file, named with its transaction number, in your ereserves or other folder in the U Drive. For example, U:\ereserve\alex access serv eres\Ecopy.

Manipulate, edit the image for quality control if necessary.

When ready, click [Deliver].

4. How do I update requests to a filled status?

As soon as articles are scanned in ILLiad, their status automatically updates to filled. You do not need to manually update the status.

5. How do I check to be sure a request was filled? How do I Look at a request's history?

There are a couple of ways to do this.

Select [Edit] –[Edit Request] and search by the request's transaction #, and display the General Request Info screen. In the lower right hand corner under Notes and Tracking Information, click on the Tracking or History tab.

-or- Select [Show] – [Tracking] or Select [Show] – [History] from a General Request Info screen

6. How do I leave a request in its current status?

Depending on what screen you're on, select [X] to Close the screen or [Leave Request in Queue]

7. Search for a request if I don't know a request's status or what queue it's in?

Select [Edit] –[Edit Request] and enter the request's transaction number, or search by values in other search fields available. For example, search by title or user name.

8. Pass a request on to another library to fill if my copy is NOS, missing?

Check the request's Tracking or History to verify it has not already been sent to another owning library.

Do a Z39.50 search of IRIS from within ILLiad:

-Press [Alt-Z] on a request's General Request Information screen.

-Click [Search] next to the [Standard Number] field if it has a value. If the request doesn't have an ISSN in the field, it's definitely worth looking it up and copy-paste it in, as this search gives the best Z search results.

-Highlight an IRIS record under "Searching IRIS" and its Location, Call Number, and Availability will display under the "Holdings" tab.

-Click on "Record Detail" for a complete record display and holdings.

-When you find a match, click on and highlight another library in the Location tab.

-Press X to close.

-The other library's Location will fill in the "Item Information" box on the General Request Information screen.

!!!Select [SAVE] !!! This is a very IMPORTANT step, if you do not SAVE, the new library and holdings information won't carry forward on the request.!!!

Close the request and search screens if open.

Double click on the "In DD Stacks Searching" queue; search by transaction number for the request, or press [Search] and find your request in the list.

Click on "Mark Item Not Found." (Be sure to position your cursor carefully and don't click on 'item found').

On the "Reason for Not Found" screen select a reason. Add a Note if you wish, for example-- "At bindery Chang, routing to Alex"

Close the request; find it again in the "Doc Del Item Not Found" queue, or by [Edit]-[Edit Request].

If the other owning library is Alex, Annex, Camden, Chang, Dana, Dglss, Klmr, or LSM, select [Route] and the appropriate "Awaiting [Library's name] Doc Del Processing" queue.

If the other owning library is Alcohol, Art, Chem, Math, Music, Physics, SMLR, select [Route] and the appropriate "Awaiting [Library's name] Doc Del Processing" queue. Then select [Email], and the library you wish to forward the request to in email. These libraries do not have the ILLiad client and can not see their "Awaiting [Library] Doc Del Processing" queue. You must remember to send the request by email.

9. How do I pass a request back to ILL to fill if my copy is the only copy in the system and it's NOS/missing, or if I'm the last owning Rutgers library to try to fill the request?

Verify in IRIS or by a Z-search in ILLiad [Alt-Z] that no other RUL libraries own the journal volume/issue needed. If another library does own it, verify in the request's Tracking or History that they were unable to fill it and have routed it to you or other libraries.

Double click on the "In DD Stacks Searching" queue; search by transaction number for the request or press [Search] and find it in the list of requests.

Click on "Mark Item Not Found"

On the "Reason for Not Found" screen select a reason. Add a Note if you wish, for example-- "At bindery Chang, routing back to ILS for interlibrary loan"

Close the request, find it again in the “Doc Del Item Not Found” queue.

Select [Route] — [Returned RU Article Awaiting ILL Processing]

10. Cancel a request if the article exceeds 30 pages?

Search for [Edit] the request and find its “General Request Information screen.”

Select [Cancel Request]

Select the radio button next to “Over 30 page on home campus” -or- “over 30 pages on remote campus” depending on the patron’s campus.

Be sure that the “Send email on this cancellation?” is checked

Click on [Cancel Request]

Email message is automatically sent to patron.

-send the volume to another campus and send a message to the patron.

Create a brief record if needed, place a Hold on the patron’s behalf, send the item to the patron’s pickup library. The customized email cancellation message from ILLiad will inform the patron the volume is on its way for in-library use.

-send a message to a patron on my campus to come in and get their article?

The customized email cancellation message from ILLiad will inform the patron.

11. How do I keep statistics?

No manual statistics or logs at this time. We will also stop logging the number of article requests that we fill for patrons at off-campus locations.

12. How do I request an ILLiad logon for a student worker?

Contact Glenn Sandberg. Send the student’s NetID user name, since we are using NetIDs for usernames to login to the client. Students initial password will be “ill” but they should change them (and to something other than their NetID password).

13. How do I ask questions about ILLiad, get assistance?

Contact staff in the ILS department. Bring questions and concerns to the RSG meetings. Please discuss and confirm all procedure changes with ILS staff and RSG.

There's also lots of ILLiad documentation on the web and an active ILLiad listserv that mostly deals with ILL minutia, but if you're interested . . .

Misc. Notes, Questions from Training, To be Determined . . .

1. There is no cross-module searching in ILLiad. If you're searching by transaction # and don't find a request in Document Delivery, try searching for it in Borrowing.

2. How do I know a patron's campus affiliation? Pickup library?

[Edit] – [Edit Customer] ?

3. How do I communicate with a patron if they have more than 10 outstanding requests that are causing turnaround time of all patron requests to suffer?

4. What does the "Odyssey Failed" message mean, and what do I do when I see it?

This may happen on the first scan of the day? Try again.

5. What's the best strategy for finding a journal's ISSN quickly?

Google the title of the journal and "issn"? Others?

6. How will ILS staff decide which library to forward a new article request to? What's the algorithm?

Check the "Awaiting [Library] Doc Del Processing" queues and choose the library with the smallest number of requests?

7. How do I see patron information and a patron's request activity all in one place?

[Edit] – [Edit Customer]. Search for the patron and when located, on the "User Lookup and Edit" screen, press [Show Requests].

8. Is the Conference Proceedings form supposed to be used for originals or copies of conference proceedings?

Can be used for both, whether a volume is sent or copy is made may depend on availability, format, length.

9. What's the connection between WorkFlows and ILLiad? What if a patron is barred in WF, will they be able to use ILLiad?

No connection. Barred patrons will be able to login to ILLiad. On the customer record in ILLiad, we may be able to block them from submitting new requests (needs investigation), but only if their barred WF status is brought to our attention, case by case.

10. Now that we're asking patrons to come in to the Libraries to make copies of 30+ page articles, shouldn't we have scanners for public use? Patrons want digital copies.

11. What if a journal is not in IRIS and not in the Ejournal list, but is available open access on the Web, will ILS staff know and cancel the request? What if RDS staff discovers a full-text open access copy of any article that's been sent to them to scan, should they inform the patron?

12. Can ILL staff begin to use barcodes on bands or in books for the brief records they create for items sent from other libraries? (like the PALCI model). It's easier to find the barcodes and use them for check-out at circulation desks?

13. How do I, will I ever need to, convert an article to a book request or vice versa?

14. After creating a new NetID, when does it become active for ILL?

15. When users changes their delivery location does it take effect on outstanding request or only future ones?

16. When emailing a request to a library that doesn't have the ILLiad client, should we also route the request to the library's "Awaiting [Library] Doc Del Processing" queue, or leave it in "In DD Stacks Searching"?

17. Will non Rutgers summer session students' NetID work for ILL?

18. If a patron has not registered their barcode in WorkFlows, how do we process an ILL loan for hold/pickup when it arrives?