LINCC
Interlibrary Loan
Aleph version 20
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Unit 1: Overview of the ILL Module

The LINCC Interlibrary Loan (ILL) module is incorporated in the LINCC client, along with the other modules including Circulation, Cataloging, and Acquisitions/Serials. Library staff will be able to manage borrowing and lending requests by logging into the LINCC client installed on the desktop. The advantages of this configuration include a more streamlined workflow, easier navigation and searching, and improved response time.

Lesson 1: Understanding Important LINCC ILL Terms

**ILL Units:** An ILL Unit is simply a collection. This collection can be a single campus, or it can be the entire collection of a multi-campus institution. Four multi-campus LINCC libraries use centralized processing; there is one ILL unit for all the campuses of each college. The remaining multi-campus libraries are decentralized; there is an ILL unit at each campus. Some decentralized colleges, such as technical processing centers or very small, specific collections in training or health centers, have campuses that are not ILL units.

**Locally Owned:** A “locally owned” check is performed when a borrowing request is initially created by a patron through the LINCCWeb catalog (OPAC) or by a staff member through the ILL module. If a patron’s home ILL unit owns a copy of the title being requested, the request will be blocked. The patron must place a hold request on the locally owned item or contact local ILL staff for assistance. The request can be placed by staff members even if the title is locally owned; however, the request will be given a status of “Locally Owned” and must be processed manually.

**Messaging:** The ILL module relies on messages to update the request’s status at the partner library as action is taken on the request. When the request is updated in either the borrowing or the lending library, a message is automatically passed to the partner to update the status of the request. Text messages may also be sent to the partner library.

**Partners:** All 28 LINCC colleges are participating in LINCC ILL resource sharing. Each participating ILL unit is added as a partner record to each ILL unit, enabling them to serve as potential suppliers of material. Additionally, for each ILL unit in a decentralized college, the other campus ILL units have been added as potential suppliers, and will be given priority when the roster of suppliers is built.

**Patrons:** Patrons must have an ILL unit defined on their Global Patron Record in order to initiate new ILL requests. Each college’s patrons have been assigned an ILL unit corresponding to the home library that was sent in with the college’s patron load. When the patron initiates a new request, the system checks this ILL unit’s collection for local ownership. The patron record also defines the total number of ILL requests permissible and the number of active requests permissible.

Some schools have chosen to limit the ILL privileges of community borrowers and other patron status. Contact the FLVCHelp Desk for assistance with borrowing limits.
Patron records have been created for each partner in LINCC. When items are supplied through the ILL module, they will be automatically circulated to these patron records in order to keep track of loaned material and to display in the LINCCWeb catalog (OPAC) that they are not available.

**Unmediated Processing:** Unmediated patron requesting is setup to occur in LINCC ILL. Additionally, background processing will:

- Locate potential suppliers for new borrowing requests.
- Send borrowing requests to the next supplier on the roster.
- Locate available items for new lending requests.
- Answer Unfilled for lending requests with no available items.
- Mark requests Overdue when their Expected Return Date arrives.
- Mark requests Expired at the lender after three days with no response.

**Workflow:** Handling of borrowing and lending requests is performed by ILL staff on a day-to-day basis. Each request has a life cycle, from the point at which it is created, until the point at which it is closed. All requests between these two points in time are active requests.

Borrowing activity includes:

- Locating potential suppliers for new borrowing requests with a status of Staff Review or Locally Owned.
- Monitoring requests with a status of Expired or Not Supplied.
- Receiving shipped items.
- Monitoring Overdue requests.
- Returning material to suppliers.

Lending activity includes:

- Reviewing Located items that are available for supply.
- Monitoring Overdue requests.
- Checking-in returned items.
Figure 1: Borrowing Request Life Cycle

This is a schematic outline of the Borrowing Request cycle. Some of the actions are optional; some of the actions can be performed in a manual or automatic manner.
Figure 2: Lending Request Life Cycle

This is a schematic outline of the Lending Request cycle. Some of the actions are optional; some of the actions can be performed in a manual or automatic manner.
Lesson 2: Navigating the ILL Module

The interface of the ILL module has not changed since the previous version. The structure, terms and concepts have remained consistent, with only minor changes in the display.

An overview of the ILL module interface is shown below. Each area of the interface is described on the following pages.

Figure 3: The LINCC ILL Module Interface (Borrowing Tab)

The example of the ILL module shown above depicts the screen view from the Borrowing tab, and shows a list of requests that have been loaned to the patron. Note the three-part window structure similar to that of the other LINCC modules. The left pane displays a request’s options in Functional mode, or a list of all requests by status in the Summary mode. The upper pane lists all requests in this particular status; the lower pane displays the details of the particular request selected in the upper pane.

Other elements of the interface are described on the following pages.

Title Bar

The title bar displays the program and module name. It also displays the connectivity information of the server, the user currently logged in, and the ILL unit for which the requests and activity are displayed.
Menu Bar

The Menu bar provides a list of options for displaying information or taking action on requests.

Borrowing Bar

The Borrowing bar is used to retrieve borrowing requests. Fields such as Request Number, Patron ID, Words From Title, and Supplier Code can be used for searching. All matching requests will be displayed in a list.

Lending Bar

The Lending bar is used to retrieve Lending requests. Fields such as Request Number, Barcode of the Supplied Copy, Words From Title, and Requester code can be used for searching. All matching requests will be displayed in a list.

Borrowing and Lending Tabs

The Borrowing and Lending activity tabs, visible above the status tree in the left-most pane, are used for viewing and handling incoming and outgoing requests. Each tab has two display modes: Functional and Summary.

Functional Mode

In the Functional mode display, actions can be carried out and records can be updated. When a request status is selected from the summary tree, the Functional mode will automatically appear. It shows the total number of requests in that status, the request log of the selected request in the upper pane, and the batch processes available for the selected tab.
Summary Mode

The Summary mode provides a “table of contents” view of requests (by request status) and messages (by message type). This view serves as an index to the requests, displaying the number of requests per status, and allows you to select a group of requests for Functional display and action. Not all statuses require action – some are shown for information only.

- To limit the display to show only statuses that have requests, select the View Active St. check box.

The Summary view contains two “nodes”: Statuses and Messages. These nodes are described below.

Statuses

The Statuses node is organized into sub-nodes, similar to folders, with “main” statuses and “sub-statuses.”

- Click the plus sign (+) to the left of a status to open the sub-statuses display.
- Click the minus sign (-) to close the sub-statuses display.

To the right of each status, a number in parentheses shows the count of the requests that currently share this status.

- Select a status or sub-status to display a summary count in the right pane, and, from there, to select a group of requests for display in Functional mode.

Messages

The Messages node is organized into sub-nodes of different message types. To the right of each message type, a number in parentheses shows the count of the requests that have received such a message, where the message has not yet been “dismissed” (that is, reviewed and acknowledged).

- Select a message sub-node to display and handle the messages in the right pane.

When viewing a request from the Summary mode, select the desired status. The upper pane will display a filter for different properties of that request. Requests can be selected based on this filter, or all requests in this status can be selected. Different filter properties will appear for different request statuses.
Administration Tab

The Administration activity tab is used to view and handle the Partners list, the Potential Suppliers list, and APDU Exceptions (error messages that occur when the system is processing ISO messages sent between partners). Records can be viewed in the Partners and Potential Suppliers lists.

Search Tab

The Search activity tab is used to locate bibliographic records in the LINCC database. Once bibliographic records are located, the Search activity tab can be used to initiate an ILL request. For more information on using the Search feature, see Unit 4.

Tools

A list of tools available to take action on requests appears as option buttons on the right side of Borrowing and Lending screens. The tools will be available based on the status of the requests being reviewed. These tools also allow the user to reply to requests and send messages to partners.
Sorting
In the requests window, the list of requests can be sorted by various criteria, including last activity date, request number, and title.

Request Tabs
Details of individual requests are displayed in the lower pane. The tabs across the top of this pane allow users to select alternate views and see additional information about the request.
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Unit 2: Managing Borrowing ILL Requests

The Borrowing tab of the ILL module can be used to manage outgoing ILL requests initiated by a patron or an ILL staff user. Borrowing activity includes creating new outgoing requests, locating potential suppliers, sending requests, receiving material, and returning material to a supplier.

Lesson 1: Creating a New ILL Request

An ILL request can be initiated in the LINCCWeb catalog (OPAC) by a patron or in the ILL module by an ILL staff user on behalf of a patron.

Patron-Initiated Requests

When a patron searches the LINCCWeb catalog and locates an item available for requesting, a Request link will appear next to the availability status.

<table>
<thead>
<tr>
<th>College/Campus</th>
<th>Collection</th>
<th>Call Number Desc</th>
<th>Status</th>
<th>Note Request</th>
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<td>St. Petersburg/Seminole</td>
<td>Children</td>
<td>J-P S c.1</td>
<td>Available</td>
<td>Request</td>
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When the request link is clicked in the catalog, the system will recognize the format of the item being requested. If the item is a monograph, the request type will automatically become Loan. If the format of the item is a serial, the request type will automatically become Copy.

After clicking the Request link, the patron will be prompted to log in to place the request. If the patron belongs to the same college as the item being requested, a Hold Request form will appear. The request will be treated as a Hold Request that is processed just as it is currently within the college, through the Hold Request reports in the Task Manager.

If the patron belongs to a different college than the item being requested, the patron will be directed to an ILL Request form (shown on the following page). The request will be treated as an ILL request and will be handled through the ILL module. The patron will be prompted to complete the ILL Request form. The patron's login information will be carried over to the request, as will information on the title being requested.

The patron must complete the following fields:

- **Last Date Needed**: The last date the patron is willing to receive the material. If the Average Supply Days on a supplier’s record would not allow the material to arrive before the last date needed, that supplier will not be considered for the request. The field is automatically populated with a default date of 14 days from the current date. The patron can type directly in the field or select a date from the pop-up calendar.

- **Preferred Contact Info**: The preferred method of contact, such as a phone number or e-mail address, if different from the one listed.
• **Pickup/Delivery Location**: The location where the patron will pick up the material.
• **Free Text Note**: An area for the patron to indicate any other conditions or information about the request.
• **Copyright Agreement**: For journal requests, the check box must be selected to acknowledge and agree to the copyright statement.

When the patron clicks Go, an ILL Request Confirmation screen will appear. The screen includes details of the request as well as options to print, submit, or cancel the request. When the request has been submitted, the form will close and the patron will be directed back to the LINCCWeb Catalog where the request was initiated.

The patron’s choice of pickup location will determine which ILL unit will process the request. The default pickup location is the patron’s home ILL library. The patron’s home ILL library and ILL limits are defined on the Patron Information tab of the patron’s record in the Circulation module.
It is possible that a patron will overlook his own college’s holdings while searching in the LINCCWeb catalog and place a request on another college’s material. When the patron submits the new request form, the system will check to see if the ILL unit handling the request owns the item. If that ILL unit owns the item, an error message “Self ownership – found” will appear and the request will not be placed. The system will not check to see if other campuses at the patron’s college own the item. However, if other campuses at the patron’s college do own the item, their ILL units will be located first when the Locate is performed, and they will be listed first in the supplier list.

**Staff-Initiated Requests**

Library staff can initiate ILL requests in the ILL module on behalf of a patron.

**To initiate a new outgoing request from the ILL module:**

1. In the **Search** activity tab (binoculars icon), locate the bibliographic record to be requested (for more on searching, see Unit 4).
2. In the lower pane, click **ILL Request** to initiate the request. The new request form will appear:

   ![New Borrow Non-Sentil Request](image)

   **New Borrow Non-Sentil Request**

   - **Patron ID:** Enter the Patron ID or Barcode of the requester. Requester information will appear on the arrival letter to allow staff to contact the patron when the material arrives from the supplier.
   - **Level of Service:** Select the level of service that is required (Normal or Rush).

3. Complete the following fields:
   - **Patron ID:** Enter the Patron ID or Barcode of the requester.
   - **Level of Service:** Select the level of service that is required (Normal or Rush).
- **Free Text Note:** Enter any other conditions or information about the request (e.g., special processing requests or a different e-mail address).

- **Pickup Location:** Enter the location where the patron will pick up the material.

- **Need by Date:** Enter the last date the patron is willing to receive the material. If the Average Supply Days on a supplier’s record would not allow the material to arrive before the last date needed, that supplier will not be considered for the request. The field is automatically populated with a default date of 14 days from the current date. Enter the date directly in the field, or click the arrow to select a date from the calendar. (The default for this date can be customized for each ILL unit. Contact the FLVC Help Desk for assistance.)

- **Requested Media:** Indicate whether the request is for a loaned item or for a copy of material. The system will automatically select a media type based on the bibliographic format of the item selected in the catalog: serial items will default to a Copy request, and monograph items will default to a Loan request.

- **Media Send Method:** Indicate the method of delivery for the requested material. The supplying library will have the option to change this when the material is shipped.

If the request is for a Copy, enter the corresponding information in the **Title of Part**, **Author of Part**, and **Requested Pages** fields. Requests for Copies will be processed in the same way Loan requests are processed (with the exception of returning the material to the supplier).

4. **Click Send.** If there are no error messages, the request will appear in the Borrowing tab of the ILL module with a status of New.
Lesson 2: Automatic Processing for the Borrowing Library

Automatic processing will handle ILL requests for the borrowing library. This means that the system will automatically process borrowing requests without staff intervention throughout the day.

For new requests, and requests with a status that may be handled by the automatic processing jobs, you may need to refresh your view of the request to see the change in status performed by the jobs. Click away from the request, and return to it, to see if the jobs have updated the status.

Automatic processing will:

- Locate suppliers for New requests.
- Build a list of potential suppliers.
- Send the New request to the first supplier in the list of potential suppliers.
- Send Unfilled requests to the next supplier on the list, when there is at least one supplier still available.

LINCC ILL identifies new requests and attempts to Locate the list of potential suppliers for each request.

- If the Locate is successful, the system will build a list of potential suppliers for the request. The list can be viewed by clicking the Suppliers tab in the lower pane. The system will also automatically send the request to the supplier, and the status of the request will change to Sent to Supplier. ILL staff users then wait for the supplier to answer the request.
- If the Locate is unsuccessful (no supplier could be found for the material), the status of the request will change to Locate Failed, and will remain in the Waiting for Process node. ILL staff users will need to handle the request manually by canceling, modifying, or trying the Locate at a later time.

The ILL module identifies locally-owned materials when new requests are submitted. At the time of a new request creation, the system searches only the collection of the patron’s ILL unit (not necessarily the entire college). If the system determines that the requested material is owned locally, the status of the request will change to Locally Owned, and the automatic processing job will not Locate potential suppliers. For requests with a status of Locally Owned, the Locate button must be clicked manually to begin the process of locating potential suppliers.
If your campus does not own the item, the system will proceed with the Locate and attempt to build the potential supplier list. When the system builds the list of potential suppliers for a request, it will first look at other campuses within the user’s college to determine if other campuses own the item. If so, the owning campus will automatically be listed first on the list of suppliers. Next, the system checks all other LINCC colleges. For other colleges that own the item, the system will first list the ten closest colleges (at the campus level). It will then automatically randomize the rest of the LINCC colleges to complete the supplier list.

It is possible for colleges to select preferred resource sharing partners, which will be given a higher supplier level and automatically be placed higher in the potential suppliers list. For more information on selecting preferred ILL partners, contact the FLVC Help Desk.

**Expiry Days**

Each supplier record contains an Expiry Days field. This is the number of days after which the request will expire at the supplier. For each request that was sent to a supplier, but no response was received within the number of days defined in this field, the request will automatically become Expired and a message will be sent to the borrowing library.

If the request located additional suppliers, it will automatically be sent to the next supplier on the list. If the request located no other suppliers, its status will change to Expired and ILL staff users must handle the request manually. The Expiry Days field is currently set to three days for all LINCC suppliers.

When the Locate is performed and the potential supplier list is created, the system does not check for the availability of the item at the supplier. It is possible to send a request to a supplier whose item is not available to fill the request. However, automatic processing now runs constantly throughout the day, and the unmediated handling process on the lending side will immediately return requests from suppliers with no available items as Unfilled. This will allow the request to be sent to the next supplier as soon as possible.
Lesson 3: Locating Potential Suppliers for a Borrowing Request

The automatic processing routine is set up to process outgoing requests constantly throughout the day. ILL staff users can also manually perform the Locate function for a request if it is done before the job picks it up. The Locate function will build a list of potential suppliers for the request based on the holdings information for each supplier.

Locate Preview

The Locate Preview function presents the results of a Locate before it is actually performed. Results are displayed in a pop-up window.

To turn the Locate Preview function off or on:

- On the Borrowing menu, select Preview on Locate.

Locate

The Locate function builds the list of potential suppliers.

To perform a Locate:

- Select the request and then click Locate.
If the Locate is successful, several things occur:

- The system builds a list of potential suppliers for the request, based on the supplier level hierarchy (local campuses first, then the ten closest LINCC colleges, then the rest of the LINCC libraries).
- The list of suppliers is automatically displayed under the Suppliers tab.
- The request status changes to Waiting for Process.
- The first supplier receives a status of New, and the remaining suppliers receive a status of Pending.

If the Locate is successful, the request will need to be sent to the first supplier on the roster.

If the Locate is unsuccessful (i.e., no supplier could be found for the material), the status of the request will change to Locate Failed. ILL staff users will need to handle the request manually by canceling, modifying, or trying the Locate at a later time.

The automatic processing jobs run constantly, and they are very quick to pick up requests. If you see an error message about not being able to perform the action on a request of this status, refresh your view of the request. It is likely the automatic processing jobs have moved the request along to a new status, and your action is no longer valid.

If your campus does not own the item, the system will proceed with the Locate and attempt to build the potential supplier list. When the system builds the list of potential suppliers for a request, it will first look at other campuses within the user's college to determine if other campuses own the item. If so, the owning campus will automatically be listed first on the list of suppliers. Next, the system checks all other LINCC colleges. For other colleges that own the item, the system will list the ten closest colleges first, in a randomized order. It will then list the remaining LINCC colleges in a randomized order.

It is possible for colleges to select preferred resource sharing partners, which will be given a higher supplier level and automatically be placed higher in the potential suppliers list. For more information on selecting preferred ILL partners, contact the FLVC Help Desk.
Lesson 4: Canceling a Borrowing Request

At times, it may be necessary to cancel an outgoing request. If the request has been sent to a supplier, it must be cancelled at that supplier before it can be deleted. This is to make sure the supplier is aware that the material is no longer needed. A request can be canceled at the existing supplier so that it can move on to the next supplier, or it can be canceled completely so that it will not be sent to any other suppliers.

To cancel a request at a supplier:

1. Retrieve the request in the Borrowing tab. Click Response.

2. In the window that appears, find the Choose Response Options field and select Cancel. Include a note if desired.

3. Click OK to send the Cancel message to the supplier.

The status of the request will become Waiting Cancel Reply, and a message will be sent to the supplier requesting cancellation. When a Cancel Reply-Accepted message is received from the supplier, that supplier will be canceled and the request will be sent to the next supplier on the list. If there is no other supplier, the request will have a status of Canceled. If the supplier sends a Cancel Reply-Rejected message, the status of the request will revert to what it was before the cancel message was sent.

To cancel a request completely:

1. Retrieve the request in the Borrowing tab. Click Response

2. In the window that appears, find the Choose Response Options field and select Full Request Cancel.

3. Include a note if desired.

4. Click OK to send the Cancel message to the supplier.

The request will be canceled at the current supplier, and it will not be sent to any other suppliers. The status of the request will become Canceled, and it can then be deleted.
Lesson 5: Receiving an Arrived Item

When an item arrives from a lender, it is necessary to Receive it in the ILL module and update the status of the request.

To register the arrival of material from a lender:

1. In the Borrowing tab, select the request and then click Receive.

   ![Receive page screenshot]

   - **Date Received:** Enter the date the item arrived from the supplier. The current date is set as the default.
   - **Expected Return Date:** Do not change this date. This is the date the lending library expects the material to be returned. When the material is checked out to the patron at the borrowing library, the system will use this date, minus the Return Delivery Delay on the supplier’s profile, to determine the length of the loan period.
   - **Item Barcode:** Enter the record’s barcode to be used during circulation. If the field is left blank, the system will automatically generate a barcode based on the System and Sequence number of the request (e.g., 3571-10). Since LINCC libraries use different barcode prefixes, the barcode that is already on the material can be used. Duplicate barcodes cannot be used.
- **Item Status:** Select the item status that will be assigned to the material. Select Circulating if the item will be loaned to a patron or In-House Use if the item is to be used in the library only.

- **Supplier Fee:** (Optional) Enter the amount charged by the supplier for providing the material.

- **Supplier Local Fee:** (Optional) Enter the amount charged by the library for receiving material from this supplier.

- **Patron Local Fee:** (Optional) Enter the amount the patron will be charged for the request.

- **Circulation Note:** (Optional) Enter a note that will be displayed when the item is loaned and returned through the Circulation module.

- **Note:** (Optional) Enter a note that will be included in the Received message that is automatically sent to the supplier.

3. When the form is complete, click OK to register the arrival. The ILL request status will change to Loaned to Library. A Received message is automatically sent to the supplier and the item is ready to be loaned to the patron. An ILL Arrival Slip, with the requester’s contact information, will print automatically when the item is Received.

<table>
<thead>
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<th>Request No.</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1515</td>
<td>Loaned to Library</td>
</tr>
</tbody>
</table>

When loaned material is Received, an item record and a brief bibliographic record are created. The item record will automatically have an item process status of IL and circulation staff will be able to see that the item has been borrowed through interlibrary loan. When the item is returned to the supplier, the item record and the bibliographic record are automatically deleted.

The barcode assigned to the item will appear in the Request Log in the Functional view of the request.
Lesson 6: Circulating the Item to the Patron

Once the item has been Received in the ILL module, it can be circulated to the patron using the barcode that was assigned during the receiving process. Once the patron has checked the item out, the status of the request in the ILL module will change to Loaned to Patron.

<table>
<thead>
<tr>
<th>Request No.</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1515</td>
<td>Loaned to Patron</td>
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</tbody>
</table>

When the item has been returned by the patron and discharged, the status of the request in the ILL module will be Returned by Patron. It is important to monitor the requests with a Returned by Patron status to determine when items are ready to be returned to the supplier.

<table>
<thead>
<tr>
<th>Request No.</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1515</td>
<td>Returned by Patron</td>
</tr>
</tbody>
</table>

Lesson 7: Renewing a Request

If a request has been received from the supplier for loan (the status of the request is Loaned), a renewal of the loan period can be requested.

To request a renewal of the loan:

1. In the Borrowing tab, select the request and click Response.

![Response Options window]

2. The Response Options window will appear. Complete the fields listed below.

![Response Options window]
Choose Response Options: Select Renew as the type of response to be sent to the lending library.

- Note: Add a note if desired.
- Desired Due Date: Enter the desired due date. Type over the zeroes or select a date using the drop-down calendar.

3. Click OK to send the request for renewal to the lending library. Once the request for renewal has been sent, the status of the request will change to Waiting for Renew Reply.

<table>
<thead>
<tr>
<th>Request No.</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1439</td>
<td>Waiting for Renewal Reply</td>
</tr>
</tbody>
</table>

If the request for renewal is denied, the status of the request will change to Renewal Rejected. If the lending library approves the renewal, the request status will change to Renewal Accepted.

<table>
<thead>
<tr>
<th>Request No.</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1439</td>
<td>Renewal - Accepted</td>
</tr>
</tbody>
</table>

4. Check the status tree to determine whether the request for renewal has been accepted or denied.

- Statuses:
  - New (0)
  - Waiting for Process (4)
  - Pending (24)
  - Shipped (0)
  - Unfilled (25)
  - Replies-Staff Review (0)
  - Received (0)
  - Returned (7)
  - Renewed (1)
    - Renewal - Rejected (0)
    - Renewal - Accepted (1)
    - Waiting for Renewal Reply (0)
  - Recall (0)
  - Overdue (12)

A Renew Accepted answer from the supplier will automatically update the loan due-date in the Circulation module.
Lesson 8: Notifying a Supplier About Damaged and Lost Items
This applies to requests that have already been received from the lender.

To notify the supplier that the supplied item is lost or damaged:

1. In the Borrowing tab, select the request and click Response.
2. Select the appropriate message from the drop-down list.

<table>
<thead>
<tr>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renew</td>
</tr>
<tr>
<td>Lost</td>
</tr>
<tr>
<td>Damage</td>
</tr>
<tr>
<td>Status Query (ISO)</td>
</tr>
</tbody>
</table>

3. Include a note describing the condition of the material. For both damaged and lost items, libraries must work out any compensation details outside of the ILL module.

The ILL module will not automatically declare the loan Lost in the Circulation module nor will it handle any invoicing related to lost items. ILL staff users may need to update the loan transaction in the Circulation module for items that have been declared Lost.

Lesson 9: Answering a Conditional Reply
A supplier may answer a request for material with a conditional reply. The supplier may choose from a list of reasons and may include a note with the message. The status of the request at the borrowing library will change to Conditional Reply and the request can be viewed in the Replies – Staff Review node of the status tree.
A Conditional Reply by a supplier requires an answer from the borrowing library before the request can advance.

**To answer a Conditional Reply:**

1. In the **Borrowing** tab, select the request and click **Response**.
2. The Response window will appear. In the **Choose Response Options** field, select **Conditional Reply**.

   ![Conditional Reply Window](image)

3. If the condition is acceptable, select **Yes**, and then click **OK** to submit the form. (If the condition is not acceptable, select **No**. The response will be sent to the supplier and the supplier's status will change to **Unfilled**. The request will then move to the next supplier.)

The request status will become Sent to Supplier. A message will be sent to the supplier indicating that the conditions are acceptable to the borrowing library. Staff then wait for the supplier to fill the request according to the conditions indicated. The condition of the request, and the reply to the supplier, can be viewed in the Request Log for that request.

![Request Log Example](image)
Lesson 10: Returning an Item to a Lender

After an item has been loaned to the patron and returned, the item must be returned to the lender in the ILL module to update the status of the request.

To register the return of the supplied material to the lender:

1. In the Borrowing tab, select the request and click Return.

2. Enter a return note, if desired. Click OK to register the return. The status of the request will change to Returned by Library.

<table>
<thead>
<tr>
<th>Request No.</th>
<th>Status</th>
<th>Last Activity</th>
<th>Msg</th>
<th>Rush</th>
</tr>
</thead>
<tbody>
<tr>
<td>1515</td>
<td>Returned by Patron</td>
<td>10/14/2007</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>1436</td>
<td>Returned by Library</td>
<td>06/01/2007</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>1279</td>
<td>Returned by Library</td>
<td>06/24/2007</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1074</td>
<td>Returned by Library</td>
<td>05/24/2007</td>
<td></td>
<td></td>
</tr>
<tr>
<td>690</td>
<td>Returned by Library</td>
<td>01/22/2007</td>
<td></td>
<td></td>
</tr>
<tr>
<td>727</td>
<td>Returned by Library</td>
<td>12/14/2006</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Lesson 11: Working With Bulk Processing

Some borrowing activity can be performed in bulk. Requests can be received or returned without searching directly for each individual request. Bulk processing is carried out in the Functional mode.

To receive requests in bulk:

1. Select the **Functional** mode, and then select the **Receive Returnable** or **Receive Non-Returnable** node.

2. Set up the process by completing the **Barcode**, **Item Status**, **Expected Return Date**, and **Arrived Media** fields. Request numbers can then be entered without searching for each individual request. All requests entered will be updated with a status of Loaned to Library.

To return requests in bulk:

1. Select the **Functional** mode and select the **Return** node.

2. Enter the item barcode or the request number. The request status will change to Returned by Library.
Unit 3: Managing Lending ILL Requests

The Lending tab of the ILL module allows ILL staff users to manage incoming ILL requests sent by another college. Lending activity includes receiving new requests, locating items to supply, answering the requester, shipping, answering requests for renewal, and checking in returned material.

Lesson 1: Automatic Processing for the Lending Library

Automatic processing is constantly running to handle ILL requests for the lending library as well as the borrowing library. On the lending side, the system will automatically recognize new incoming requests and attempt to locate the material within the lending ILL unit’s collection. The system will attempt to locate a matching bibliographic record and any available items. Circulation checks are performed to determine whether the material can be loaned to the requester.

- If the Locate is successful, the status of the request becomes Located, and the details of the located item are displayed in the lower pane, under the Items tab.
- If the Locate is not successful (no available item could be found in the lending ILL unit’s collection), the status of the request becomes Answer Unfilled, and the request will move to the Not Supplied mode in the status tree. The Unfilled message is sent immediately to the borrowing library.

Lesson 2: Viewing New Incoming Requests

New incoming requests for which available items have been Located are listed in the Review node of the Status Tree. Statuses are described below.

- **New**: The request has been sent to the ILL unit from a borrowing library, but the Locate function has not yet been performed to see an item is available.
- **New – Staff Review**: When the request was sent by the borrowing library, a note was included. Requests with this status will not be handled by automatic processing since there may be special instructions in the Note field. The note can be viewed by clicking the Request Details tab in the lower pane.
- **Located**: The Locate function has been performed (either manually or by automatic processing) and at least one item has been identified as available to fill the request.
- **Located and Printed**: The Locate has been performed and a Request Details slip has been printed.
- **Multiple Located**: The Locate has been performed and multiple matching bibliographic records were located. The Locate must be performed again, and one of the bib records must be selected before the system can determine whether there is an available item record.
To perform a Locate for requests with a status of New, Staff Review, or Multiple Located:

1. Click the Locate button on the toolbar.
2. A Locate Preview screen will appear, showing potential matching items and availability. (The Locate Preview screen can be toggled on or off from the Menu bar: on the Lending menu, select Preview on Locate.)

When the record is located, ILL staff users will need to answer the request manually by sending an Answer message or by shipping the item.

**Report and Slips**

The Lending ILL Requests report (ill-65) can be used to list lending requests and create slips for located items.

To complete the Lending ILL Requests report:


   ![Lending Library - ILL Requests Report (ill-65) - SPC40](image)

2. Complete the following fields:
   - **Report Name**: The report must be given a name. The file name must be entered in lowercase, with no spaces or special characters except underscore and hyphen. This name will be used to retrieve the report from the Task Manager.
- **Print Slips**: Select Yes if slips are needed for retrieving located material.
- **Handle Request Status**: Select the status of lending requests that are to be listed on the report.

3. Click **Submit** to generate the report.
4. Retrieve the report (and slips, if chosen) from the Task Manager.

### Lesson 3: Sending an Answer to a Requester

Sending an answer to a requester can be accomplished in several ways.

- To answer Unfilled for a request, click Unfilled (see Lesson 4 for more information).
- If the lending library is going to supply the item, the process of shipping the item provides the answer to the borrowing library's request (see Lesson 5 for more information).

To send any other answer to a requester:

1. Click **Response**.

2. The Response Options window will appear. In the **Choose Response Options** field, select the appropriate response. Response options are listed below.

   - **Conditional**: Changes the status to Answer Conditional. In the Status Tree, the request changes status to Conditional. This indicates that a condition must be met by the requester before the material will be supplied (e.g., charges apply, copyright signature needed, library use only). When the requesting library answers in agreement, the status becomes Condition Accepted, and the material can be sent.
- **Retry**: Changes the status to Answer-Retry. In the Status Tree, the request status changes to Not Supplied. This indicates to the requester that the request should be sent again at a later time when material is available.

- **Will Supply**: Changes the status to Answer Will Supply. In the Status Tree, the request changes status to In Process. This indicates that the material will be supplied at a later date, as specified on the form.

- **Hold Placed**: Changes the status to Answer Hold Placed. In the Status Tree, the request changes status to In Process. This indicates that staff at the lending library have placed a hold request on the item, and that the item will be sent to the requesting library when it is returned.

**Lesson 4: Answering Unfilled**

If no available item has been located by the automatic processing job, the system will immediately answer Unfilled. However, if an available item is found, the system will mark the request as Located, and a staff decision will determine whether the item is supplied or not. If the request will not be filled, staff must answer Unfilled manually.

**To answer a request as Unfilled:**

1. If the decision is made not to fill a request, click Unfilled.

   ![Unfilled Window](image)

2. The Unfilled window will appear. In the **Reason** field, select the appropriate option. The list of reasons is extensive. Select the reason most appropriate for the decision not to fill the request.

3. Enter a comment in the **Note** field, if needed. Click OK to submit the message. The status of the request will become Unfilled, and can be found in the Not Supplied node of the status tree.

**Expire Days**

Each Supplier record contains an Expiry Days field. This is the number of days after which the request will expire at the supplier if no action has been taken on the request. For each request that was sent to a supplier, but no response was received within the number of days defined in this field, the request will automatically become Expired and a message will be sent back to the borrowing library.

The Expiry Days field is currently set to three days for all LINCC suppliers.
Lesson 5: Shipping Items

If the lending library chooses to supply the item, there is no need to send an Answer message. When the item is shipped, a message will automatically be sent to the requesting library, and the request status will change to Shipped.

To begin the process for shipping material:

1. In the Lending tab, select the request and click Ship.

2. The Shipping Type window will open. By default, Returnable Shipment will be selected for loan requests, and Non-Returnable Shipment will be selected for non-returnable requests (e.g., articles, photocopies). Click OK.

3. In the window that appears, complete the form to define conditions of the supplied material. Fields in the Returnable Shipment form are described below.

- **Send Date:** Enter the date on which the material will be sent to the requester. The default is the current date, but if a delay is expected, a future date can be entered.

- **Send Method:** Select the method by which the material will be sent to the requester. Options for Loaned material include Courier, US Mail, and Express Delivery (e.g., UPS, DHL, FedEx).

- **Supplied Media:** Select the media type being supplied. Options for Loan include Printed, Film or Video, Audio Recording, Machine Readable, Microform, and Other. The field will default to the type of media being requested by the borrowing library, as displayed in the Request Details view.
- **Item Barcode:** (Required) Enter the barcode of the item being loaned. The system will perform a check to verify that the barcode exists in the lending library’s collection, and that it matches one of the barcodes located for supply by the Locate function.

- **Expected Return Date:** Enter the date the lending library expects the material to be returned, or click the arrow to select a date from the calendar. When the material is checked out to the patron at the borrowing library, the system will use this date, minus the Return Delivery Delay on the supplier’s profile, to determine the length of the loan period. The default date is 28 days from the current date. The default can be customized for each ILL unit; contact the FLVC Help Desk for assistance with setting the default date.

- **Fee:** If a fee is being charged to the borrowing library, enter the amount.

- **Note:** Enter a note that will appear on the request at the borrowing library.

When the Shipment form is submitted, the request status is updated to Sent on Loan. When the requesting library Receives loaned material in the ILL module, the status of the request will be updated to Material Received. When the requesting library receives a Copy of the material, the status of the request will be updated to Closed.

When Loan requests are shipped, the item is checked out in the LINCC Circulation module to a patron record that corresponds to the borrowing library. The loan period will correspond to the date entered in the Expected Return Date field. If the item becomes overdue, a notice will print for this library’s patron record along with the regular overdue notices.

**To view the item record in the Circulation module:**

- Select the 4. Items tab in the lower pane and click **Push to Circ**.
Lesson 6: Working With Overdue Items

Lending requests have a due date, as indicated by the Expected Return Date field on the Shipment form when the item was shipped. If this date arrives and the item has not been checked-in at the lending library, an automatic processing job will declare the item Overdue at both the borrowing and lending libraries. The requests will then appear in the Overdue status in the status tree and staff will not have to monitor the due dates on all the lending requests.

Lesson 7: Answering Requests for Renewal

If the borrowing library initiates a request to renew the loaned material, the status of the request at the lending library will be updated to Request for Renewal. The request for renewal will display in the Messages node.

To answer a request for renewal:

1. Click the **Request for Renew** message.
2. In the upper pane, select the request and click **Select**.
3. In the window that appears, complete the following fields described.
- **Choose Response Options**: Select Renew Answer.
- **Renewal Answer**: Select Yes or No, depending on whether the request can be renewed. If Yes is selected, enter a Renewal Due Date. When the form is submitted the due date will be updated on the Circulation record of the borrowing library. The Request for Renew message will be deleted.

4. Note the renewal message in the request log.

The request status will return to Renewal Accepted, and the request can be found in the Renewal Accepted node of the status tree.
Lesson 8: Checking-In Returned Material

When material is returned by the borrowing library, it must be checked-in to complete the ILL transaction.

To check-in a returned item:

1. In the Lending tab, select the request and click Check-In.

2. The Return window will appear. Enter a message in the Note field, if needed.

3. Click OK to finish the transaction and submit the Return message to the borrowing library. The request status will change to Closed.

Lesson 9: Working With Bulk Processing

Some lending activity can be performed in bulk. Requests can be shipped, checked-in or marked Unfilled without searching directly for each individual request. Bulk processing is carried out in the Functional mode.

To ship items in bulk:

1. Select the Functional mode. Select the Ship Returnable or Ship Non-Returnable node.

2. Complete the Item Barcode, Expected Return Date, and Request Number fields to ship the item.
To check-in items using bulk operations:

1. Select the **Functional** mode. Select the **Check-In** node.

2. Enter the **Item Barcode** and **Request Number** to update the request.

To mark requests unfilled in bulk operations:

1. In the **Functional** mode, select the **Unfilled** node.

2. Select an option from the **Reason** field, and then enter the **Request Number** of the requests to be updated.
Unit 4: Searching in the ILL Module

Search capability is an integral part of the LINCC Library Management System and is fully integrated into the ILL, Circulation, Cataloging, and Acquisitions/Serials modules. The Search feature can be accessed from each of these modules by clicking the Search activity tab (the binoculars icon) in the Navigation Tree. Each module also offers module-specific search fields in option bars located below the Menu bar. Once the Search activity tab is selected, three nodes become available: Find, Browse, and Show.

Lesson 1: Using Find for Keyword Searching

Keyword searching is usually the easiest and fastest method to find records in LINCC, especially when specific information, such as an ISBN or OCLC number, is used. Keyword searching is also useful when searching multiple fields, such as Author, Title, Publisher, and Publication Year. Keyword searching allows results to be limited to a particular format or publication year.

The Find node provides access to three types of Find keyword searches: Advanced Search, Multi-field Search, and Multi-base CCL Search. Advanced Search is the most commonly used keyword search. Multi-field and Multi-base CCL searches are described in Lesson 7.

To perform an Advanced Search:

1. Click the Search activity tab, and then select the Find node.
2. In the upper pane, click the 1. Advanced Search tab.
3. The default database, visible in the Base field, is “LINCC BIB” – the main bibliographic database. To limit the search to a subset of LINCC, or to search another bibliographic database, click the arrow to the right of the Base field, and then make a selection from the list.

The search can be limited to a particular college (e.g., Manatee BIB) or to a particular sublibrary (e.g., MJC Bradenton BIB; MJC Venice BIB). Other available bases include the LINCC Authority File (LINCC AUT), the library’s course reserves (e.g., Manatee CRS) and several external databases (e.g., Library of Congress bibliographic database, Library of Congress Authority file).
4. Click the arrow to the right of the first search field. A list of available search options will appear. The list is divided into three categories: basic word fields, numeric fields, and limiting fields. Select the field to be used for the search.

<table>
<thead>
<tr>
<th>Basic word fields</th>
<th>Numeric fields</th>
<th>Limiting fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>LINCC DID</td>
<td>ISBN (no hyphens)</td>
<td>ISSN (hyphen)</td>
</tr>
<tr>
<td>Titles</td>
<td>BIB System No.</td>
<td>Publishers (240)</td>
</tr>
<tr>
<td>Authors</td>
<td>DRA system number</td>
<td>View (248)</td>
</tr>
</tbody>
</table>

5. In the adjacent search field, enter search terms. If needed, use the remaining fields to narrow or broaden the search by defining additional criteria.

6. Click OK.
7. Search results will appear in the lower pane.
   - If five or fewer records are found, the records are automatically displayed in the Show view.
   - If more than five records are found, a summary of the search criteria will be displayed in the lower pane. To view the records, click **Show**.

All searches are saved until the module is closed. Individual searches can be deleted while the module is open by selecting the search summary in the list and then clicking **Remove**.
Lesson 2: Refining a Find Search

Any search can be refined. This is particularly useful if a search yields too many records to browse through easily. Refining a search can be accomplished either by restarting the existing search (using additional search fields and terms to narrow or broaden the search) or by using the Refine feature.

To refine a Find (keyword):

1. Perform a Find search. In the lower pane, select the appropriate search summary.

2. In the Refine section of the upper pane, click the arrow to the right of the Field search field. Select a field to be used to refine the search.

3. In the Refine Query field, enter a word or phrase, and then click Refine.
   - If five or fewer records are found, the records are automatically displayed in the Show view.
   - If more than five records are found, a summary of the search criteria will appear in the lower pane. To view the records, click Show.
Lesson 3: Navigating the Show View

The Show view, which lists the results of a particular search, consists of two panes: the upper pane, which lists all of the records in a brief, columnar display, and the lower pane, which gives a full display of a particular record in a variety of formats.

The Brief List

The upper pane of the Show view offers three options for viewing records: Brief List, My Records, and Brief Records. The most useful of these options is the Brief List, shown below.

In the 1. Brief List tab, a search field at the top of the upper pane displays the terms used to formulate the search. Information about how the results are sorted and which database was used is displayed below the Search field. A list of records appears in the main part of the pane, displaying the title, author, publication year, and location of each record.

The following options are available on the 1. Brief List tab:

- **Sort**: Sorts the records in the list. If the records are resorted, the information located below the search field will be updated.
- **Save As**: Saves a search as a list of sets. Rarely used.
- **Print/Send**: Prints the record. There are various ways to print the record, including MARC format, Citation, and Catalog Card. (The E-mail Record feature is not used.)
- **My Records**: Saves the selected record by moving it to the 2. My Records tab.
- **Jump To**: Used to browse for specific headings when the 1. Brief List tab contains a large number of records.
Lesson 4: Using the My Records Feature

The 2. My Records tab contains records that were saved during a search.

The following options are available on the 2. My Records tab:

- **Save**: Saves records displayed in the 2. My Records tab to the local computer. The file must be saved in .xml format.
- **Load**: Loads a saved file of records.
- **Clear**: Clears all records from the 2. My Records tab.
- **Remove**: Removes the selected record from the list.
- **Print/Send**: Prints the record. There are various ways to print the record, including MARC format, Citation, and Catalog Card. (The E-mail Record feature is not used.)

Lesson 5: Viewing the Full Record

In the Show view, the full record is visible in the lower pane when a single record is selected in the upper pane.
The tabs across the top of the lower pane allow the full record to be viewed in different ways:

- **Full+Link**: Displays the bibliographic record with field headings. This view also contains location information. This is the default view; all of the features in the full display work only in this view.
- **MARC Tags**: Displays the entire MARC record.
- **Public View**: Displays a view similar to the MARC Tags view with descriptions of each field rather than the tag number.
- **Citation**: Displays a bibliographic citation of the record.

The following options are available in the lower pane:

- To move to the next and previous records, use the < and > icons.
- **Locate**: Performs a rudimentary title search in the current or other databases.
- **Show Like**: Displays a brief list of other titles that match the selected subject or author field.
- **Headings**: Displays a browse list of headings when a subject or author field is selected.
- **External, Link, Item List**: Not used.

**Lesson 6: Moving Records from the Show View**

Once a record appears in the Show view, it can be “pushed” to other activity tabs within the module or to other modules.

To push a record to another activity tab within the same module:

- View the full record in the lower pane. Click the appropriate option to move the record. In the Acquisitions/Serials module, Orders and Serials are available options.

To push a record to another module:

1. View the full record in the lower pane.
2. In the Navigation Tree, click the Search activity tab, and then select Overview.
3. The MARC Record will be displayed. To push the record to another module, click the corresponding module in the list of options to the right of the MARC record.

4. To return to the Show view, in the Navigation Tree, select Functional.

Lesson 7: Using Multi-Field and Multi-Base CCL Search

Two additional Find keyword search methods are available in the Find node of the Search activity tab: Multi-field Search and Multi-base CCL Search. These search methods are not as useful as the Advanced Search, but can be beneficial.

To perform a Multi-field search:

1. Select the Find node.
2. In the upper pane, click the Multi-field Search tab.
3. Click the arrow next to the Base field to view available options, and then select the database to be searched.
4. Complete the appropriate search fields. If more than one field is used, the Boolean operator “AND” will be used to link the terms.
5. Select or clear the Words Adjacent check box. If the check box is selected, the exact phrase(s) will be searched for and retrieved. If the check box is not selected, all words entered in the fields will be searched for and retrieved.
6. Click OK to perform the search. Results will appear in the lower pane.
To perform a Multi-base CCL Search:

1. Select the **Find** node.
2. In the upper pane, click the **Multi-base CCL Search** tab.
3. Select one or more of the databases listed.

![Multi-base CCL Search tab](image)

4. Select or clear the **Words Adjacent** check box. If the check box is selected, the exact phrase(s) will be searched for and retrieved. If the check box is not selected, all words entered in the fields will be searched for and retrieved.
5. In the **CCL Query** field, use Common Command Language (CCL) codes to enter a search string.
6. Click **OK**. The results of the search will appear in the lower pane.

---

**LINCC Note**

For information on using Common Command Language searching in the LINCC client and the LINCCWeb catalog (OPAC), see FLVC’s Library Staff Resources web page.
Lesson 8: Using Browse Searching

Browse searching is especially useful when searching for a specific title, author, or subject heading. Browse searching provides a list of headings that closely match the search term. Most external databases, including the Library of Congress, do not support browse searching.

To perform a Browse search:

1. Click the **Search** activity tab.
2. Select the **Browse** node.

3. Complete the following fields:
   - **Base**: Select the database to be searched.
   - **Headings List**: Select the appropriate heading.
   - **Enter Starting Text**: Enter a portion of the heading. The entire heading does not need to be entered since a list of headings that closely match the search terms will appear. The first few words of the heading should be sufficient.
   - **Include Expanded AUT Data**: If this check box is selected, any notes in authority records that appear in the list will be displayed.
   - **Include BIB/HOL Data**: If this check box is selected, each record will be listed along with the first library that has a holdings record attached. Typically, this is not useful for LINCC users.
4. Click **Go** to perform the search. A list of headings that closely match the search terms will appear.

![Search Results]

When Browse searching, the search term or the heading that closely matches the search term, will appear *second* in the list of results. The first heading in the list is the heading that immediately precedes the search term. All headings below the second heading in the list are headings that fall after the search term. The number to the left of each row indicates how many records use the heading.
5. To view one or more records, select the heading(s) and click **Show**. The record(s) will appear in the Show view.

The following options are available in a Browse search:

- **Expand**: Displays the relevant headings associated with an authorized heading when a heading that has a related authority record is selected.
- **Save as Set**: When a single heading is selected, Save as Set saves this heading as a search, which will then appear in the Find node as a separate search.
- **Correct Heading**: Displays options to correct a heading in the database.
- **Correct Display**: Displays options to correct the way a heading is displayed in the database. This feature is very useful for correcting punctuation.
- **AUT Recheck**: When a heading with a related authority record is selected, AUT Recheck rechecks the database for all records with this heading.
- **Show**: Pushes records to the Show view.
- **Brief Recs**: Not used.
- **Catalog**: Pushes records from the Browse search to the Cataloging activity tab in the Cataloging module.
Lesson 9: Searching for a Borrowing Request
Requests can be retrieved by different criteria, using the Borrowing bar.

To search for a borrowing request:

1. In the first field of the **Borrowing bar**, select a search field.

2. Enter search terms in the adjacent search box.

3. Click the blue arrow to begin the search.

Requests can be located by keywords or title. Numeric fields like Patron ID, Barcode and Request Number, can be searched. All requests at a particular supplier can be identified by entering the supplier’s five-character code.

Lesson 10: Searching for a Lending Request
Requests can be retrieved by different criteria, using the Lending bar.

To search for a borrowing request:

1. In the first field of the **Lending bar**, select a search field.

2. Enter search terms in the adjacent search box.

3. Click the blue arrow to begin the search.

Requests can be located by keywords or title. Numeric fields like Patron ID, Barcode and Request Number, can be searched. All requests at a particular supplier can be identified by entering the supplier’s five-character code.
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Unit 5: Using the Task Manager

The Task Manager enables staff to view or print reports and letters and to monitor the progress of various jobs that have been run or are running. The Task Manager is located in the Administration activity tab in each module. Depending on the module, the Task Manager will be present with other functions (e.g., Course Reserves, Partners, and Budgets), or it will be the only entry (as in the Cataloging module).

The Task Manager has four nodes: File List, Batch Log, Batch Queue, and Print Daemon. Print Daemon is not used.

Lesson 1: Using the File List

The File List is used to view or print reports and letters that have been run from the Services menu in any module or that have been placed there by FLVC. It is the most commonly used function of the Task Manager. The files on the server are displayed in the lower pane; files that have been copied to the local computer are displayed in the upper pane.

Key sections are described below:

- **Library**: Indicates the library to which the user is connected, such as the XXX40, XXX50, or FCC01, etc.
- **Clear Filter**: Used to remove a filter which was created by using the View Printouts button in the Batch Log node so that all files on the remote server are shown in the lower pane.
- **Delete**: Used to delete reports or letters that have been copied to the upper pane. Functional only for local files.
- **Rename**: Used to rename reports or letters that have been copied to the upper pane. Functional only for local files.
- **Print**: Prints the selected file. Can be used with Local or remote files.
- **Refresh**: Refreshes the list of files shown in the lower pane. Functional only for remote files.
• **Print Configuration**: Used to determine how the report or letters will be printed. The default view is Print Preview. Other options are Normal Printing (used with e-mail), View Raw XML, and Browse XML.

• **Setup Type**: Active when Normal Printing is selected. Used to determine how the report or letter will be printed. Options are Print, E-mail, or Both.

• **Print Setup**: Active when Normal Printing is selected. Options are Y or N.

• **Sort By**: Sorts the files in the upper and lower panes. The default is Date/Time Descending.

---

**To print a report or letter in the File List:**

1. Click the **Administration** activity tab in any module.
2. Click the **File List** node.
3. Locate the desired report or letter in the lower pane.
4. Click **Print** to display a print preview (or double-click the file to transfer it to the upper pane and then click **Print**).
If a report that has been submitted does not appear in the File List, contact the FLVC Help Desk. The submittal form’s parameters may be causing it to retrieve too large a set of records to enable it to finish in a reasonable amount of time.

For example, the date range may be too large or a sublibrary may not have been selected, causing the report to run for the entire college. FLVC can end any job that is taking too long to run. The submittal form can be reviewed, changes made to narrow the report, and the report can be resubmitted.

Lesson 2: Navigating the Batch Log

This lesson provides a closer look at the functions of various elements of the batch log. The Batch Log can be used to monitor the running of each job and to troubleshoot jobs in which a problem occurred. It lists the batch processes that have run or are currently running.

**Batch Log Node: Upper Pane – Batch Log tab**

When the Administration activity tab is clicked and the Batch Log node is selected, the Batch Log appears in the upper pane. The Batch Log tab displays each job with basic information about it.

The following fields and options are available on the Batch Log tab:

- **Library**: Indicates the library to which the user is connected, such as the XXX40, XXX50, FCC01, etc.
- **Print ID**: Not used.
- **Type**: Filters the list of jobs based on the selection made. Choices are tied to USERID and module and include: All, Only Mine, Run from server, Acquisition, Cataloging, Circulation, ILL, Indexing, Items, Serial, Staff, and System.
- **Status**: Filters the list of jobs based on the status of the job. Choices are: All, Success, Done with errors, Abort, Running, and Failed.
- **Date From/Date To**: Filters the list of jobs according the date the job was run.
- **Service Form**: Retrieves the submittal form corresponding to the selected job. Changes can be made to the form as needed and resubmitted if the report does not contain desired results.
- **View Printouts**: Filters the File List so that only print outs associated with the job selected in the Batch Log are shown in the lower pane of the File List. To remove the filter so that all files appear in the lower pane of the File List, click Clear Filter.
- **Refresh**: Refreshes the list of files shown in the upper pane.

**To use the Service Form:**

1. Select a job in the upper pane.
2. Click the Service Form button.
3. Review the form and make any necessary changes.
4. Click Submit.
5. Click the File List node, and then click Refresh in the upper pane. The new report will be listed in the lower pane.

   If the report does not appear immediately, it may still be running. Click Refresh again until the file appears in the lower pane of the File List.

**To use the View Printouts feature:**

1. Select the job in the upper pane.
2. Click View Printouts. The focus will shift to the File List. The only file displayed in the lower pane will be that corresponding to the result of the selected job.
3. Click Print to display a print preview (or double-click the file to transfer it to the upper pane and then click Print).
4. In the File List upper pane, click Clear Filter to remove the filter. All files will be displayed in the lower pane.
**Batch Log Node: Lower Pane – Tab 1. Batch Job Details**

The 2. Batch Job Details pane displays more complete details about the job selected in the upper pane.

![Batch Job Details](image)

**Batch Log Node: Lower Pane – Tab 2. Log File**

The 2. Log File tab displays complete data from the log file about the job selected in the upper pane.

![Log File](image)
Lesson 3: Using the Batch Queue

The Batch Queue displays the jobs waiting to be run. Jobs will run as soon as previously submitted jobs finish. The Batch Queue can be used in conjunction with the Batch Log to troubleshoot problems with reports and letters.

Fields in the Batch Queue are described below:

- **Library**: Indicates the library to which the user is connected, such as the XXX40, XXX50, FCC01, etc.
- **Status**: Indicates whether the Batch Queue is running or not running. Reports and other services will only be run if the Batch Queue is running. If it is not running, FLVC must be contacted to restart it.
- **Delete**: Deletes the highlighted job to prevent it from running.
- **Change Runtime**: Enables staff to change the date and/or time a job will run. Clicking this option will cause the Change Entry's Runtime dialog window to appear so that the date and time during which the job will run can be changed.
- **Refresh**: Refreshes the list of files shown in the batch queue.
Appendix A: LINCC Documentation and Help

Documentation for LINCC is extensive and almost exclusively online. The following resources are available to assist you with questions related to specific module functionality or procedures.

**LINCC Manuals**: LINCC manuals cover the basic functionality of LINCC modules and provide screen shots and simple, step-by-step instructions. Module-specific LINCC manuals are distributed during each on-site training session and are available online from FLVC’s Library Staff Resources web page.

**LINCC Help Sheets**: FLVC has developed “help sheets” to assist library staff in performing LMS-related activities that are unique to LINCC. These help sheets are available online from FLVC’s Library Staff Resources web page.

**Aleph Module Help**: Almost every screen or window in the modules contains a Help menu and a Help option that lead to a description of each field. In addition, a Help icon on the Menu bar allows users to search module-specific help.

**Aleph Documentation**: Aleph’s vendor, ExLibris, provides additional print documentation that includes general information about Aleph implementation. For more information on Aleph documentation, contact the Help Desk.

**Additional Resources**: Additional resources, in a variety of formats, are available on the FLVC web site. These resources include LINCC discussion lists, which provide additional information from FLVC and other LINCC users; *Linking to LINCCWeb*, which explains the process of developing URLs for LINCC-based products for local college web sites; equipment recommendations; the LINCC Reports Service (LRS); online help for the LINCCWeb catalog (OPAC), SFX, and MetaLib; and much more.

**FLVC Help Desk**: The Help Desk is available during all hours of library operation to assist college library staff with LINCC products and services. Contact the Help Desk by e-mail at help@flvc.org or by phone at (850) 922-6044 during regular business hours (8:00 a.m. to 5:00 p.m. ET, Monday – Friday).
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Appendix B: List of Request Statuses

**Borrowing Tab**

The statuses and messages available for requests being processed in the Borrowing tab, and the specific statuses and messages into which those groups can be expanded, are listed below.

<table>
<thead>
<tr>
<th>Status Type</th>
<th>Status Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>New, New – Staff Review, Locally Owned</td>
</tr>
<tr>
<td>Returned</td>
<td>Returned by Patron, Returned by Library</td>
</tr>
<tr>
<td>Waiting for Process</td>
<td>Waiting for Process, Locate Failed, Daemon Send Failed</td>
</tr>
<tr>
<td>Renewed</td>
<td>Renewal - Rejected, Renewal - Accepted, Waiting Renewal Reply, Recalled</td>
</tr>
<tr>
<td>Pending</td>
<td>Will be Supplied, Sent to Supplier, Waiting Patron Response, Hold Placed</td>
</tr>
<tr>
<td>Overdue</td>
<td>Overdue</td>
</tr>
<tr>
<td>Lost</td>
<td>Lost</td>
</tr>
<tr>
<td>Shipped</td>
<td>Shipped</td>
</tr>
<tr>
<td>Unfilled</td>
<td>Unfilled</td>
</tr>
<tr>
<td>Replies – Staff Review</td>
<td>Conditional Reply, Retry, Estimate Reply, Location</td>
</tr>
<tr>
<td>Cancel</td>
<td>Waiting for Cancel Reply, Cancelled</td>
</tr>
<tr>
<td>Closed</td>
<td>Closed</td>
</tr>
<tr>
<td>Expired</td>
<td>Expired</td>
</tr>
<tr>
<td>Messages</td>
<td>Cancel Reply, General Message, Status Query, Status or Error Report</td>
</tr>
</tbody>
</table>

**Notes:**
- New: Indicates that the request has been created but not yet acted upon.
- Returned: Indicates that the request has been returned by the patron or the library.
- Waiting for Process: Indicates that the request is waiting for processing.
- Renewed: Indicates that the request has been renewed.
- Pending: Indicates that the request is pending further action.
- Overdue: Indicates that the request is overdue.
- Lost: Indicates that the request has been lost.
- Shipped: Indicates that the request has been shipped.
- Unfilled: Indicates that the request is not yet filled.
- Replies – Staff Review: Indicates that there are responses pending staff review.
- Cancel: Indicates that the request has been cancelled.
- Closed: Indicates that the request has been closed.
- Expired: Indicates that the request has expired.
- Messages: Indicates that there are messages related to the request.
## Lending Tab

The groups of statuses and messages that are available for requests being processed in the Lending tab, and the specific statuses and messages into which those groups can be expanded, are listed below.

<table>
<thead>
<tr>
<th>Status Group</th>
<th>Statuses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review</td>
<td>New, New – Staff Review, New and Printed</td>
</tr>
<tr>
<td></td>
<td>Located, Located and Printed, Mediated</td>
</tr>
<tr>
<td></td>
<td>Multiple Located, Mult. Located and Printed</td>
</tr>
<tr>
<td></td>
<td>Referred</td>
</tr>
<tr>
<td>Overdue</td>
<td>Overdue</td>
</tr>
<tr>
<td>Recall</td>
<td>Recall</td>
</tr>
<tr>
<td>Lost</td>
<td>Lost</td>
</tr>
<tr>
<td>Damage</td>
<td>Damaged</td>
</tr>
<tr>
<td>Not Supplied</td>
<td>Answer Retry, Answer Unfilled, Answer Estimate, Expired</td>
</tr>
<tr>
<td>Closed</td>
<td>Closed</td>
</tr>
<tr>
<td>Messages</td>
<td>General Message, Cancel, Status Query, Status or Error Report</td>
</tr>
<tr>
<td>Return</td>
<td>Return</td>
</tr>
<tr>
<td>Conditional</td>
<td>Condition Accepted, Answer Conditional</td>
</tr>
<tr>
<td>Cancel</td>
<td>Cancelled by Requester</td>
</tr>
</tbody>
</table>
Appendix C: LINCC ILL Reports

The following reports are available on the LINCC Reports Service (LRS) web page. Additional reports are currently in development.

G-001 - ILL Lending Library Statistics (Monthly)

The Lending Library Statistics report provides statistics on lending activity within the given month for the ILL Unit and for the college as a whole. Each borrowing ILL Unit that has sent a request is listed as a row. Actions on requests from that borrower are listed as columns. The final two columns list average days to Fill or Unfill requests for that ILL Unit. The following information is included:

- **New**: Requests that were received from a borrowing ILL Unit.
- **Cancelled**: Requests that were cancelled by the borrowing ILL Unit or the patron.
- **Unfilled**: Requests that were responded to with an Unfilled message.
- **Expired**: Requests that have not been acted on in the time specified on the supplier record as Expiry Days.
- **Filled**: Requests that were filled, for both Copies and Loans. Activated when the supplier clicks Send.
- **Returned**: Requests that have been returned from the borrowing ILL Unit.
- **Average days to fill a request**
- **Average days to mark a request unfilled**
Appendix C

G002 - ILL Borrowing Library Statistics (Monthly)

The Borrowing Library Statistics report provides statistics on borrowing activity within the given month for the ILL Unit and for the college as a whole. Each ILL Unit that has been sent a request for supply is listed as a row. Actions on those requests are listed as columns. The final two columns list average days to Fill or Unfill requests for that ILL Unit. The following information is included:

- **New**: All new requests. This number will apply only to the first row, your own ILL Unit. It includes requests placed by patrons and by staff.
- **Sent**: Requests that have been sent to that ILL Unit for supply.
- **Cancelled**: Requests that were cancelled by the borrowing ILL Unit or the patron.
- **Unfilled**: Requests that were responded to with an Unfilled message.
- **Expired**: Requests that have not been acted on in the time specified on the supplier record as Expiry Days.
- **Filled**: Requests that were filled, for both copies and loans. Activated when the supplier clicks Send.
- **Returned**: Requests that have been returned to the supplying library.
- **Average days to fill a request**
- **Average days to mark a request unfilled**

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