

What you'll need to track Incoming Interlibrary Loans with the Mandarin System

By using this method you will:

- No longer need to track ILL Items on paper
- Be able to run overdue reports and statistics when needed
- Track what titles are requested and use this information in working with your collection.

If you have any questions on setting this up please call the SLS office 431-8489

1. Installation or Creation of the ILL Templates

- There are 2 templates: **ILL IN** (Bibliographic) and **ILL IN HLDG** (Holding)

They will be referred to in the instructions. If you do not have them on your machine, please contact us and let us know. The SLS office can place the templates on any machine we have remote access to.

- * If there is a machine you use for ILL and we do not have remote access to it, please call us and we will arrange to send you the templates and walk you through the process of saving them.*

3. Requesting the ILL from OURS

- Make use of the **Comments Box** at the bottom of the request to put in your patron information. You can easily scan a patron barcode# into there.
- Your email is now in the **CC: box** so that you have a tracking copy of what you're waiting for.

Requesting Library

Submitter Name

Submitter E-mail

Reset

Need by Date

January 2011						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Item Information

LCCN UNKNOWN
ISBN 0553494791 (pbk.) :
Title Statement The sisterhood of the traveling pants /
Main Entry--Personal Name Brashares, Ann.
Barcode T0046859

**Additional Request Information
(max 500 chars)**

Comments


CC

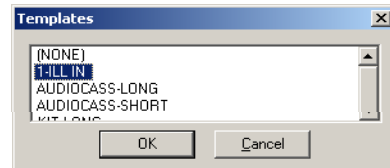
OK Cancel

Tracking INCOMING Interlibrary Loans with the Mandarin System Part 1

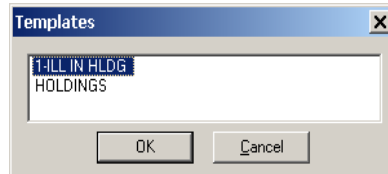
These directions assume the 2 Templates are installed on the computer you're working on.

USING THE INTERLIBRARY LOAN TEMPLATES & GROUP

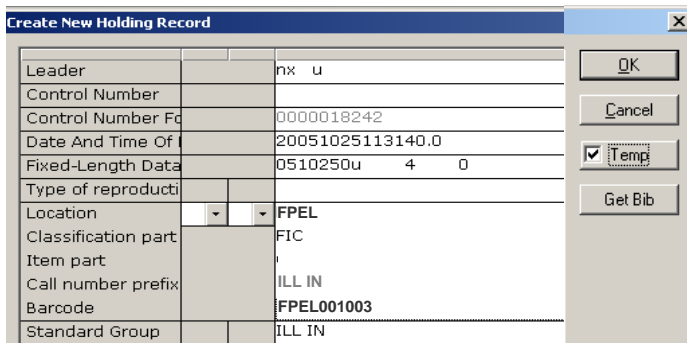
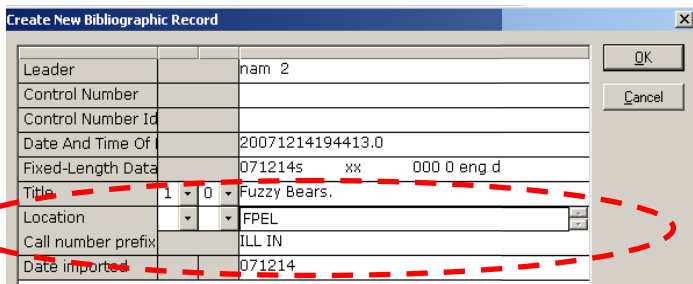
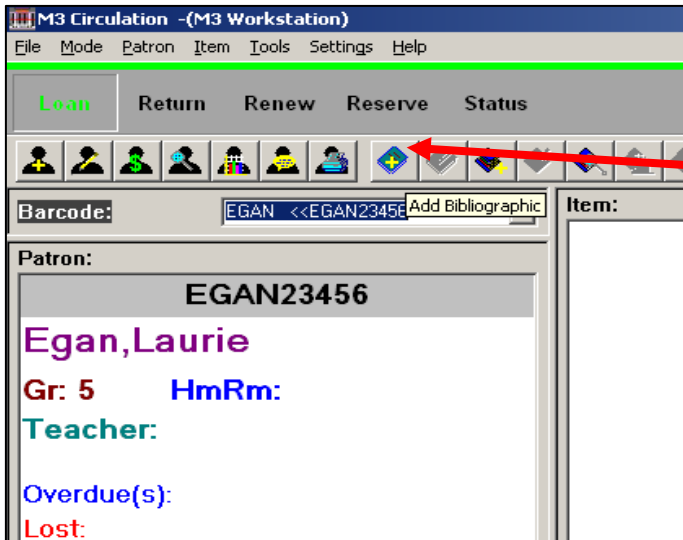
1. Open **M3 CIRCULATION**
2. Bring up **PATRON** that ILL Material is going to.
3. Click the **ADD BIBLIOGRAPHIC** button 
4. Select **ILL IN** from *Templates* window & click **OK**



5. Type in **TITLE** of item (Remember this is just a *Brief Record*)
6. Type in **LENDER LOCATION** either here or in Holding Record (School Code or Name is fine)
7. Click **OK**
8. At "*Create Holding Record?*" click **YES**
9. Select **ILL IN HLDG** from the *Templates* window




10. Type in **LENDER LOCATION** if you didn't in Bib. Record (School Code or Name)
11. **SCAN BARCODE ON BOOK** for the holding barcode/852p
NOTE: If you get "**Barcode in Use**" message Add "**ILL**" to end of barcode #
12. **CLICK TEMP BOX**
I cannot stress enough the importance of this step
13. Click **OK**



- Book is now loaned out to patron and shows up on their record
- If patron does not return book in time it will show up on your *Overdue Report*
- When you *Return the Item*, the Bib & Holding record you created:
 - ✓ Will Automatically go to **DELETED Status**
 - ✓ Won't Show Up in Web OPAC (But, you must mark the **TEMP** box, Step #12)
- The item(s) will stay in the ILL IN Group and you can easily get your Incoming ILL Statistics

Tracking INCOMING Interlibrary Loans with the Mandarin System – Quick Sheet

(Remember these are only to be *Brief Records*)

1. Open **CIRCULATION**
2. Bring up **PATRON**
3. **ADD BIBLIOGRAPHIC**  - use **ILL IN** template, keep it **brief**
4. Type **TITLE & LOCATION**
5. **CREATE HOLDING RECORD** - use **ILL IN HLDG** template

6. Type **LOCATION** if you didn't in Bib. Record

NOTE: If the lending library has their schoolcode (ex. BHS0012345) as part of their barcode you can skip this part since your using their barcode in the record anyway - you'll have the location code right there.

7. **HOLDING 852#P** = Scan Book's Barcode

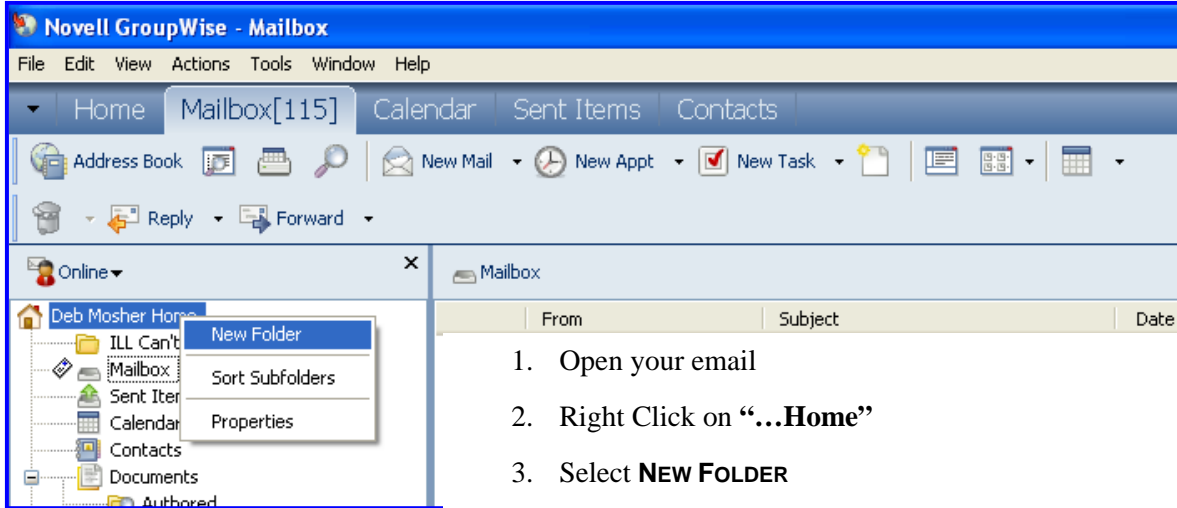
NOTE: For "Barcode in Use" message add "ILL" to end of barcode #

8. **CLICK TEMP BOX** **I cannot stress enough the importance of this step**

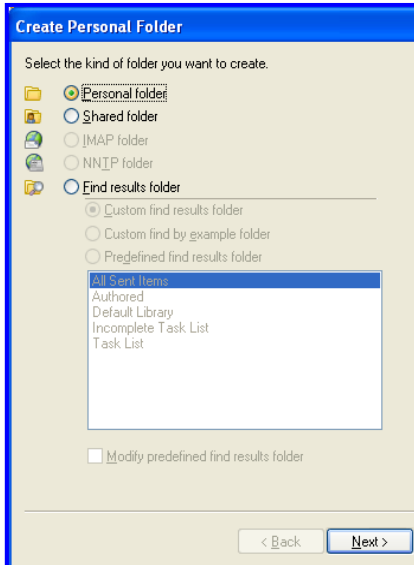
Tracking Interlibrary Loans – Part 2, the Unfilled Request

By using this method you will **no longer need to track Unfilled ILL Items on paper.**

While the screenshots/instructions below are for people using **GroupWise**, the concept can be applied to any email package. If you use another type of email and need assistance please email or call.

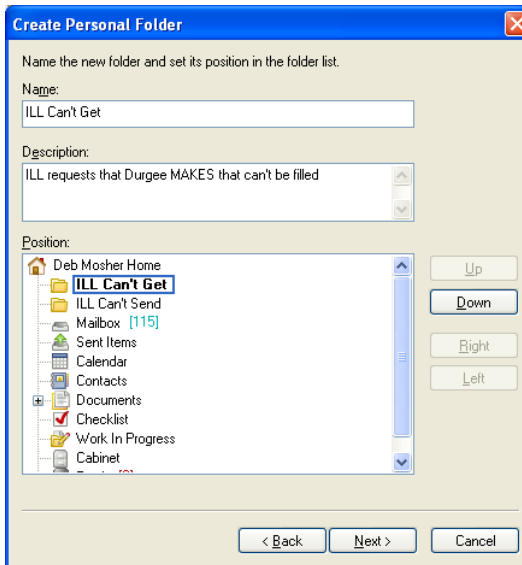


1. Open your email
2. Right Click on “...Home”
3. Select **NEW FOLDER**



4. **Select the kind of folder ...**
= Personal folder

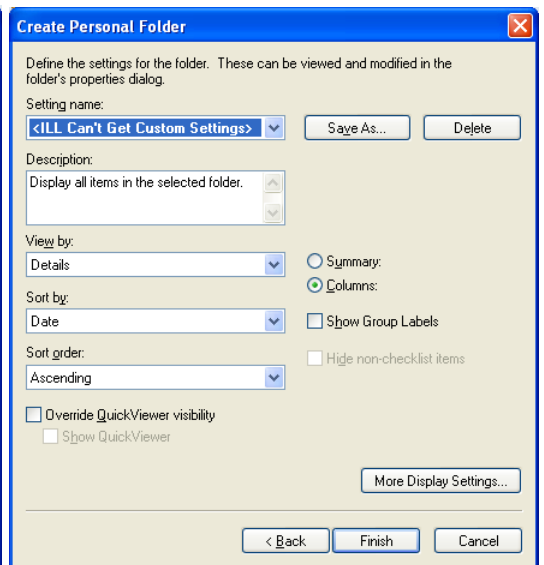
5. Click **NEXT**



6. **Name** = ILL Can't Get
(or whatever makes sense to YOU)

This folder will store the email you get from people saying they can't fill YOUR request.

7. Click **NEXT**



8. Leave settings “as is”

9. Click **FINISH**

10. Repeat Steps 2 – 9

11. Name your 2nd folder “**ILL Can't Send**” (This folder will house email you reply to saying that you can't fill **THEIR** request.)

HOW TO USE THESE FOLDERS:

Open ILL Request email – if **YOU CAN'T FILL**

1. Reply to it
2. Move original message to **Can't Send** folder

Open ILL Request email – if **YOUR REQUEST CAN'T BE FILLED**

1. Move the message to the **Can't Get** folder

The SLS office will need a count of the email in these 2 folders twice a year (December and June) for statistical purposes.

Once you have sent us the number of Unfilled for each folder:

1. Delete the email messages
2. Empty your trash