TUTORIAL
ILL RERO

Non-RERO Libraries

Version 2 (July 2006)
ILL RERO TUTORIAL  
Non-RERO Libraries

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Getting started with **ILL RERO**

I. **Internet browser versions**

- The following browser versions are recommended:
  - *Internet Explorer*: v. 5; 5.5; 6 (Windows)
  - *Netscape*: v. 7
  - *Mozilla / Firefox*
  - *Opera*
  - *Safari*

- The following versions are not recommended:
  - *Netscape*: v. 4.5; 4.6; 4.7; 6
  - *Internet Explorer* (Mac)

II. **Use of access codes by librarians**

Only ONE access code should be used per librarian for **ILL RERO**.

III. **Navigating in ILL RERO**

**DO NOT use the browser arrows**, but rather the **ILL RERO** "Cancel" and "Continue" buttons appearing on the various pages and forms to be completed.

IV. **Consulting ILL RERO**

For security reasons, librarians should use **ILL RERO** from a workstation that is not freely accessible to the public.

V. **Invoicing in ILL RERO**

Every request dispatched is invoiced at Frs. 2.00 even if it is not met.

Please note that this cost does not include the amount that may be charged by the RERO libraries themselves for the interlibrary lending of their documents.

However, to abide by the interlibrary lending rates agreed in Switzerland in particular, responder (i.e. lending) libraries are asked to deduct from these charges the amount corresponding to libraries borrowing from the **ILL RERO**.

The invoicing date will be that on which the request is first dispatched and not its date of creation. In the case of unmet requests, a new document capture may be made without incurring a new charge of Frs. 2.00.

A list of requests being invoiced is available in the 'Services' menu as shown on the invoice. Clicking on "Simple statistics" brings up the number of requests for the next invoicing period.
1. Procedure for accessing *ILL RERO*

To be able to use the system, non-RERO libraries must register with the RERO Central Office in Martigny. From the main page of the RERO website, follow the menu 'A propos de RERO>Services>Prêt entre bibliothèques’ for more information, or go directly to http://ill.rero.ch/library/. (Note that help links are in french only.)

They must complete the online form, supplying the information requested about their libraries, the contacts and librarians who will be using *ILL RERO*. They will then receive confirmation of their registration by e-mail along with their access codes.

Libraries outside the RERO Network can only be requester libraries (i.e. they request documents from RERO libraries) but not responder libraries (RERO libraries cannot request documents from them). Such is the case of the Swiss National Library, for example.

» Each ILL librarian should have an individual operator code and password. If several people were to use the same operator code and the same password, it could give rise to confusion and complications.

### 1.1 Support

Should problems arise, help can be obtained in the following ways:

- By sending an e-mail to: ill.library@rero.ch
- At http://www.rero.ch, by going to ‘A propos de RERO>Contacts>Direction et centrale RERO’
- By telephone, at 027 721 85 85

*ILL RERO* tutorials as well as a history of software changes are also available at http://www.rero.ch, under ‘Documentation>Prêt entre bibliothèques’.

Lastly, the FAQ showing in particular how to solve possible problems of connecting to *ILL RERO* can be accessed at http://ill.rero.ch/help/how-to/how-to-connect.html.
2. Access to *ILL RERO* for librarians

**NB:** To be recognized when connecting in future, the first connection must be made via the address [http://ill.rero.ch](http://ill.rero.ch); subsequent connections can be made starting with the RERO Union Catalogue ([http://opac.rero.ch](http://opac.rero.ch)) so as to retrieve the references of the desired document (the document’s full record).

As the life-span of ILL RERO cookies is limited to 6 months for security reasons, it may be necessary, in the event of access problems, to reconnect once via the address [http://ill.rero.ch](http://ill.rero.ch), which reactivates the cookies in question and again enables access to ILL RERO through the RERO Union Catalogue ([http://opac.rero.ch](http://opac.rero.ch)).

### 2.1 Access via the URL [http://ill.rero.ch](http://ill.rero.ch)

This direct access to the system is independent of access to the ILL via the RERO Union Catalogue (see 2.2).

After connecting with the URL [http://ill.rero.ch](http://ill.rero.ch), the following screen appears:

![ILL RERO Access Screen](image)

- Enter the RP code (for Swiss libraries) or the library's symbol code, the access code and password on the form.

  If you have forgotten your access codes please click on the 'Remind me of my access codes' link (see **2.3 Requesting ILL RERO access codes**)

- Check the "Save library, access code and language for future logins" box. By checking this box, the system will recognize your library for future logins.
Click the ‘Enter’ button. The following screen appears:

Click on the "Patron Requests" link. The table of patron requests appears:
Click on the "New" link to create a new ILL request using the RERO document number.

Chapters 3 to 5 ("Follow up of patron requests", 'Request for a monograph' and 'Request for an article') then make it possible to track the progress of the ILL request.

2.2 Access via the RERO Union Catalogue by retrieving document references

The second way to access ILL RERO is through the RERO Union Catalogue.

After consulting the catalogue (http://opac.rero.ch), ILL can be accessed through the full record of the desired document:
Click the "Interlibrary loan" button: the screen shown below appears.
If the following screen appears instead, you must first connect correctly with your access codes to [http://ill.rero.ch](http://ill.rero.ch) (see 2.1 Access via the URL [http://ill.rero.ch](http://ill.rero.ch)):

Once the access codes are correctly entered, the system retrieves the references for the document being sought.
The following screen appears if you are requesting a monograph:

… if you are requesting a periodical article:

Clicking the "Continue" button generates a capture of available materials. (See paragraph 4.4 Capture of materials available in RERO).
2.3 Requesting *ILL RERO* access codes

If you have forgotten your *ILL RERO* access codes you may make a request by clicking on the 'Remind me of my access codes' link at the top right hand side of the login screen.

The following screen appears:

Several criteria are used to identify the library being sought:

1. e-mail address of the library or that of the librarian
2. the library's RP code and zip code
3. the last 4 digits of the library's telephone number and its zip code

The response to this request is automatic if, and only if, the supplied data makes it possible to identify the library unequivocally. The information is then sent by e-mail (to the e-mail addresses given at the time of registration).

A direct request can also be made to RERO through the link at the bottom of the page; the form allows you to input the data that will be sent to ill.library@rero.ch:

>> Send A Request To RERO <<
3. Follow up of patron requests

3.1 Table of patron requests

Patron requests can be tracked by viewing the table of requests in process.

In addition to the operator's code and the date, which are displayed at the top of the screen, the librarian can view the user requests in process: the display shows a maximum of 10 requests by default.

3.2 The main menu

The main menu contains the following functions:

> Menu Help | Home | Patron Requests | Services | RERO Union Catalogue

*Help*: you can download the PDF files containing the manuals for RERO Network libraries and for non-RERO Network libraries.

*Home*: gives access to what's new in the latest ILL RERO version, as well as the new features of previous updates.

*Patron requests*: opens the menu containing patron request functions (see Chapter 3.3).
**Services**: gives access to the details of libraries registered in *ILL RERO*, a statistics function, invoicing details for a given period, and to locked requests.

**Union Catalogue**: allows you to open the RERO Union Catalogue in a new window.

The **Quit** function must be used systematically to exit the program and close the session (rather than closing the browser window).

### 3.3 Patron requests: functions displayed

- **New** function allows you to make a new request by capturing bibliographic references and materials based on the RERO number (visible in the full record of the desired document).

- **Status Summary** gives you a numbered overview of user requests by status (New, Approved, Dispatched…).

- **Batch Processing** function allows the status of a batch of requests to be changed rapidly.

- The **Archives** function makes it possible to access old requests.

- With the **Filter by** popup menu you can:
  
  - Filter the requests by their status and view, for instance, only new requests. The operator can modify the status of each request and several statuses are proposed.
With each reconnection, the search filter is automatically selected depending on the last change made by the librarian:

- **Modified 48 hours ago**, if the last change was made within the previous 48 hours.
- **Modified 7 days ago**, if the last change was made within the previous 7 days.
- **Modified 1 month ago**, if the last change was made less than one month ago.
- **Unchanged for 1 month**, if the last change was made over one month ago.

This automatic selection does not apply to archived requests, however.

### 3.4 The icons in the table of patron requests

- **.Refresh**: the **Refresh** button allows update of data in the table (updating is not automatic)

- **.Correspond**: the **Correspond** button allows communication between libraries. You must select a request.

- **.Capture**: the **Capture** button allows editing the list of documents already captured and to capture references of copies or of holdings in the local catalogues of the RERO Network. You must select a request.

- **Change status**: the **Change status** button makes it possible to change the status of a request: depending on the stage reached by the request (dispatched, document sent, request approved…) ; a choice of status is proposed. At least one request must be selected. Although handy for simultaneously changing the status of a batch of requests, this command is no longer recommended as it is adequately replaced by batch processing.

- **View history**: the **View history** button makes it possible to consult the history of the request: modifications; document capture status; notices to users; interlibrary communications. A request must be selected.

### 3.5 How to manipulate the table of patron requests

(Top of the table)

<table>
<thead>
<tr>
<th>No.</th>
<th>Type</th>
<th>Comments</th>
<th>Created</th>
<th>Modified</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>00116409</td>
<td>M*</td>
<td>Rui Melianie</td>
<td>06.01.05</td>
<td>06.01.05 17:22</td>
<td>Dispatched [frc]</td>
</tr>
<tr>
<td>00116368</td>
<td>M</td>
<td>Aari Thomas</td>
<td>06.01.05</td>
<td>06.01.05 15:54</td>
<td>Dispatched [go89]</td>
</tr>
<tr>
<td>00114554</td>
<td>P*</td>
<td>Wolfsche Heinz</td>
<td>20.12.04</td>
<td>06.01.03 12:59</td>
<td>Request Rejected</td>
</tr>
<tr>
<td>00116268</td>
<td>P*</td>
<td>Jenny Rudolf s.v.p. tous volumes</td>
<td>06.01.05</td>
<td>06.01.03 10:46</td>
<td>Dispatched [q3]</td>
</tr>
</tbody>
</table>

- ****: by checking or unchecking the box at the top left of the table, you can select or de-select all requests.

- / : the padlock is black (■) when the request is editable, and red (■) when it is locked and cannot be edited.
- **No.** corresponds to the request number. Clicking on a request number allows you to access the content of the request and launch actions (capture, send a notice, close, archive…).

- **Type** corresponds to the type of request received:
  - **M** request for RERO monograph
  - **P** request for photocopies of an article from a RERO periodical
  - **M** request for a partial photocopy of a RERO monograph
  - **P** request for the loan of a RERO periodical

- **Comments** reproduces the data appearing in the "Comments" field on the form.

- **Created** date of creation of request.

- **Modified** date when request was last modified.

- **Status** status of the request.

- these icons make it possible to sort in ascending or descending order. Only one column can be sorted at a time, while the other columns will display the icon indicating that they are not being sorted.
4. Request for a monograph

4.1 Identifying the work

The RERO number of the desired document must be retrieved from the RERO Union Catalogue.

In this example, after searching the RERO Union Catalogue (above), the RERO number is retrieved from the document's full record:

RERO no 1705482

4.2 Requesting the work

Connect to ILL RERO following the procedure described above (Chapter 2. Access to ILL RERO for librarians).

Click Patron requests, then New (see para. 2.1), to bring up the following screen:
Click the "New request for monograph or copy of article" link.

The following screen appears:

- Type in the RERO number of desired work.
- Click "Validate RERO Number". (This action is not compulsory; you may proceed directly to the next action).
- Click "Continue".
If the number is incorrect, the following message will appear:

*The RERO number given is invalid, no bibliographic reference found.*

![Image](https://example.com/image1.png)

You must then make a fresh search to retrieve the correct RERO number.

### 4.3 New request

Once the correct RERO number is validated and "Continue" activated, the following screen will appear:

![Image](https://example.com/image2.png)

The document references have been retrieved; it is possible at this stage to choose a request for photocopies or even add a comment (optional).

- Next click "Continue" to generate a capture of the copy or copies available in RERO Network libraries.

**Please note:** Once this stage is completed, the system will treat the request as having been launched. It will be thus automatically included in the half-yearly *ILL RERO* invoice sent to your library, even if the request is eventually not filled.
Clicking "Cancel" aborts the action and brings up the screen showing the table of patron requests in process.

4.4 Capture of materials available in RERO

As indicated above, activating "Continue" will bring up the screen: Capture of documents for request [...].

All copies available in all local catalogues are then captured irrespective of their status (available; on loan; with ... status). The libraries are displayed by alphabetical order of their RP code.

For the request below, three items have been located (one of which is not accepted for interlibrary lending):

Buttons − and +:

- − : Located on the first line, this button can be used to remove earlier choices from the order of priority of requests.

From the second line onward:

- + : this button makes it possible to add an item to the list. The priority given to the item is shown in the Order column.

- − : this button can be used to remove an item from the capture list.

Please note: For the request to be processed, at least one library must be selected using the button +.
The captured documents may appear in different colours:

- **Grey**: ILL accepted
- **Yellow**: ILL not accepted or subject to condition
- **Red**: ILL Responder Service closed, no ILL, or document not attributed to a library (location without Responder)

The accessible documents are displayed by status type:

- Available (with type of document/loan)
- With status (with status description)
- On loan (with due date)
- Not available for loan

Comments may be inserted in the field provided for that purpose, on the right of the table of captures. These comments will be sent to the library selected.

Examples:
- Vols. 4 and 5 please
- To be reserved, please

Various types of messages may appear below the table:

For example, "A reservation request will be automatically filed for each selected work that is on loan" on the order form will indicate that this item is subject to a reservation request, especially when the selected document is on loan.

Other messages could be displayed, such as:

- the list of unavailable local catalogues
- the list of closed libraries (holidays, stock-taking…)

⇒ Clicking the "Continue" button, routes the loan request to the first library chosen and it is displayed with "Dispatched" status in the table of patron requests, together with the library's acronym.

Another possibility is *Cancel*. This action takes you back to the table of requests.

There are two ways to view the captured list of holdings via the table of requests:

- by checking the request and clicking on **View history**;
by checking the request and clicking on 

Capture : the capture of holdings can be re-

started manually and the current request can be cancelled, so long as its status is not "In

Process".

Comments:

It is also possible to request a partial copy of a monograph. A request for a partial copy of a

monograph \( M^* \) is treated like a request for a photocopy of an article from a periodical \( P \). A loan

request for a periodical \( P^* \) is processed like a loan request for a monograph \( M \).

Types of request :

- \( M \) request for a monograph
- \( P \) request for photocopies of an article from a periodical
- \( M^* \) request for a partial photocopy of a monograph
- \( P^* \) request for the loan of a periodical

On the request editing page, the request can be converted to the corresponding type:

- for a monograph: \( M \to M^* \)
- for a periodical: \( P \to P^* \)

and similarly: \( M^* \to M \) and \( P^* \to P \).

4.5 Two possibilities for the loan of materials

4.5.1 Material available

The request has the "Dispatched" status (the request can still be cancelled at this stage). Once

the order form is printed by the responder library, the status becomes "In process" or "In

process (R)" if the material is currently loaned out.

Once the material is dispatched, the status of the request becomes "Document Sent".

4.5.2 Conditional loan

The library lending the document may wish to attach a special condition to the loan.

The status of the request in the table of requests then becomes: "Conditional loan".

To accept or reject this conditional loan request, see 4.9.1 Accepting the condition and 4.9.2

Rejecting the condition.

4.6 Receipt of the item

Once the requested item is received, the status of the request must be changed:

➔ Tick the request number.

➔ Click on \( \text{Change status} \).
The following screen will appear:

Go to the "New Status: Choose a status" field.

Choose the "Document Received" status. The "Comments" field is optional.

Click the "Change" button.

In the table of requests, the request status becomes "Document received". The due date is indicated on the request form that has been completed by the lending library.

4.7 Request for a renewal

See Chapter 10. Requesting a renewal for a monograph on loan.

4.8 Returning the material by the requesting library

Actions pertaining to the return of the material are made from the "Patron requests" table.

Tick the request(s) for the document(s) which must be returned to the responder library.

Click the "Change status" button.
The following screen will appear:

Choose a new status: "Document returned". The "Comments" field is optional.

Click the "Change" button.

In the table of requests, the new status of the request is "Document returned".

4.9 Conditional loan

The responder library may accept the request for the loan of a document that is subject to conditions.

In that case, the request appears in the table of requests (in red) with the "Conditional loan" status.

To accept or reject this conditional loan:

Click the request number.

The condition will appear at the bottom of the form in orange letters.

Two options are now available: accepting or rejecting.

4.9.1 Accepting the condition

To accept the condition:

Go to the "Next action" field at the bottom of the form.

Select "Accept conditional loan".

Click the "Continue" button.
A new screen "Accept conditional loan" is displayed:

> Click the "Accept" button. The "Comments" field is optional.

In the table of requests, the status of the request is "Condition accepted" (in green).

To process the request as normal, refer to paragraph 4.5.

**NB:** *The condition will be printed in the "Comments" field on the order form voucher.*

### 4.9.2 Rejecting the condition

To reject the condition:

> Go to the "Next action" field at the bottom of the form.
> Select "Reject conditional loan".
> Click the "Continue" button.

A new screen "Reject conditional loan" is displayed:

> Click the "Reject" button. The "Comments" field is optional.

The table of requests now shows the status of the request as "Dispatched" only if there is a captured copy available. Otherwise, the status of the request is "Request rejected". In the latter case, two possibilities are offered:

- make a new capture of documents, or
- close the request.
5. Request for an article

Following up a request for an article does not really differ from that of a monograph, except that the system calculates the cost of the copies to be sent and there is no operation for returning the document to the responder library.

5.1 Verifying pages and references

The request can be consulted via the table of patron requests in process and appears with the New status.

The following screen is displayed after clicking on the request number in the table of patron requests.

![New Request: Copy Of Article - Microsoft Internet Explorer](image)

The system will retrieve the references for the periodical desired. The title, author, year, volume, number and pages fields must be filled in as accurately as possible. If the correct number of pages is given, the calculation is done automatically. Otherwise, the responder library will count the pages to arrive at the cost.

⇒ By clicking "Continue", the next action can be activated.

Another possibility is "Cancel", which again brings up the table of requests.

It is also possible to request a periodical on loan. A request for a partial copy of a monograph M* is treated like a request for a photocopy of an article from a periodical P. A request for the loan of a periodical P* is processed like a request for a monograph M.
Types of request:

- M request for a monograph
- P request for photocopies of an article from a periodical
- M* request for a partial photocopy of a monograph
- P* request for the loan of a periodical

The page for editing requests can serve to convert the request to the corresponding type:

- for a monograph: M -> M*
- for a periodical: P -> P*

and vice versa: M* -> M and P* -> P.

5.2 Capture of RERO holdings

Choosing Capture RERO holdings will bring up the screen: Capture of documents for request 00051214.

All holdings in all local catalogues are now displayed. The libraries are displayed in alphabetical order (see following page):
The references for the requested article appear at the top of the table to avoid the selection of libraries that do not have the desired holdings.

### 5.3 Choosing the responder libraries

The choice of responder libraries can be made using the following buttons:
- 🎁: Located on the first line, this button can be used to remove earlier choices from the order of priority of requests.

On subsequent lines:

- 🎁: this button allows you to add an item to the list. The priority given to the item is shown in the **Order** column.

- 🎁: this button can be used to remove a choice from the capture list.

**Please note:** For the request to be processed, at least one library must be selected using the button 🎁.

The librarian establishes an order of priority and the table is modified to reflect the choices made:

![Capture Of Documents](image)

Comments may be inserted in the field provided for that purpose on the right of the table of captures. These comments will be sent to the library selected.

For example:

- No 5 1970

**Various types of messages may appear below the table:**

- the list of unavailable local catalogues
- the list of closed libraries (holidays, stock-taking…)
This information enables the librarian to select the libraries available for interlibrary loan.

By clicking the "Continue" button, the loan request is routed to the first library chosen and is displayed with "Dispatched" status in the Table of patron requests, along with the library's acronym.

There are two ways to view the captured list of holdings via the table of requests:

- by ticking the request and clicking on **View history**:

  History Of Documents Captured In Local Catalogues

<table>
<thead>
<tr>
<th>Order</th>
<th>Library</th>
<th>Requested On</th>
<th>Comments</th>
<th>Status</th>
<th>Replied On</th>
<th>With Reservation</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>[last]</td>
<td>25.06.04</td>
<td>Others...</td>
<td>20.06.04</td>
<td>11:33</td>
<td>envoy avec le 9075#</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>[gic]</td>
<td>29.06.04</td>
<td>Request</td>
<td>29.06.04</td>
<td>14:29</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- by checking the request and clicking on **Capture** : the capture of holdings can be restarted manually and the current request can be cancelled, so long as its status is not "In Process".

The request is processed by the responder library chosen and the copy of the article dispatched. The requester library then processes the receipt of the material.

### 5.4 Receipt of the materials by the requester library

The library requesting the materials will see the following appear in the table of requests: "Document sent". The cost shown must be verified on the basis of the number of pages indicated on the order form attached to the materials, for example.

The following procedure must be used for materials received:

- Open the "Filter by" menu and select the "Document Sent" status
- Choose the request(s)
- Click the "Change status" button
A new screen appears titled "Change the status of the following requests":

Choose "Document Received". The "Comments" field is optional.

Click the "Change" button.

The table of requests now shows the status of the request as "Document Received". Once the status becomes "Document received", the request procedure is complete, and the request is automatically closed and filed.
6. How to close a request

- Click on the request number in the table of requests.
- Open the "Next Action" menu at the bottom of the request form.

| Current Status | In Process
|----------------|-----------
| Next Action    | Choose An Action

- Select "Close request and notify user".
- Click on "Continue".
- Next click the "Close" button.

The closed request now disappears from the table of patrons and appears in the table of archived requests.
7. Cancelling a dispatched loan request to the responder

- Tick the "Dispatched " loan request.

- Click "Capture."

The following screen will appear:

![Capture of Documents Screen]

- Click to cancel the corresponding request.
- Click "Continue".

The loan request is automatically cancelled and the status changed to "Request cancelled" if all requests have been cancelled. Otherwise, the request retains the "Dispatched" status.
8. Capturing new documents

1. Tick the loan request with "Dispatched" status.

2. Click ⏯️ ⏯️ Capture.

3. Click on "Capture new documents".

The following screen will appear:

4. Add the new documents for capture using + and explain this new capture in the 'Comments' field.

The request then follows the normal route of loan request.

5. Click "Continue".

Next, please follow the same procedure shown in paragraph 4.4 Capture of materials available in RERO.
9. Reminder for a monograph

Reminders are managed on the basis of the descriptors used for request statuses.

The descriptors used for reminders are:
Reminder (1), Reminder (2), Reminder (3), Reminder (4) and Reminder (n)

The reminders are thus clearly numbered, (1) for the first, (2) for the second and so on, (n) being used as of the 5th reminder.

The history of modifications lists the status descriptors differently from the statuses themselves, which are placed on the right for easier identification, while the Comments column contains any comments made at the time of sending the reminder.

When sending the reminder, the responder may notify the requester by e-mail or even add a comment.

Only the responder can close the reminder. That action is optional but may be useful if the reminder must be expressly cancelled.

In that case the request loses its descriptor and reverts to its previous status, i.e., either "Document sent" or "Document received".

The requester may also notify the user by means of a new "Reminder". In that case the request loses its descriptor and reverts to "Patron notified" status.

Note: Similarly, the request loses its descriptor with any change of status, whether effected by the requester or the responder.
10. Requesting a renewal for a monograph on loan

- Click on the "Patron requests" link.
- In the "Filter by" menu, select either the "Document received", "Patron notified", or "Document sent" status.
  The request must have one of these statuses to make the renewal possible.

Depending on the filter chosen, the table of requests shows only requests with "Document Received", "Patron notified", or "Document sent" status.

- Click the desired request number.

The request form is displayed on the screen.

- Go to the "Next action" field at the bottom of the form.
- Select a new status "Send new renewal".
- Click the "Continue" button

The following screen will appear:

If the request has already been the subject of one or more renewals, the system shows that information as well as any responses in the 'Earlier requests' field. The 'New request' field allows you to send the new request with an optional comment for the responder:
Click "Send" to dispatch a request, and "Cancel" to cancel and return to the patron requests page.

The table of requests now shows a changed status. As appropriate, the renewal descriptors are as follows:

- Renewal (1), Renewal (2)
- Renewal accepted
- Renewal denied

The renewal requests are thus clearly numbered; their quantity is limited to two per request as in Virtua.

The history of modifications makes it possible at a glance to tell the status and the descriptor associated with the various stages of the request:
The responder library will modify the loan period. The date is displayed on the request form:

- Click on the request number in the table of requests.

The due date is displayed on the form in dark blue.

How to close a renewal request:

A renewal request can be closed only by the requester, irrespective of the descriptor of the renewal request.

Following is the procedure for closing a renewal request:

1. On the patron requests page, click the request number as if to edit or validate it
2. Select the "Close renewal" function in the local "Next action" menu
3. Click the "Continue" button

The request then loses its descriptor and reverts to the "Document sent", "Document received" or "Patron notified" status.

The requester too may notify the user by means of a new "Renewal denied" notice. The request will lose its descriptor and revert to "Patron notified" status.

Note: Similarly, the request loses its descriptor with any change of status, whether made by the requester or the responder.
11. Requesting a copy of a monograph

A new request for a monograph brings up the following screen:

![New Request: Monograph](image)

You then simply check the 'Request for copies' option and input the information required for the copies to be sent.

The table of requests displays the request as M* (Requesting a copy of a monograph):

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>Type</th>
<th>Comments</th>
<th>Created</th>
<th>Modified</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>00116583</td>
<td>M*</td>
<td>( )</td>
<td>10:12:05</td>
<td>10.12.05 15:17</td>
<td>Dispatched [lec2]</td>
</tr>
</tbody>
</table>
The system automatically calculates the cost payable by the requesting libraries:

When the status of the request becomes "Document received", the effect is to automatically close and archive the request.
12. History of a request

To view the various transactions of a request:

- Check the relevant request number in the table of requests.
- Click on "View history."

The following screen appears:

![Image of the screen showing request history]

The history shows the creation date and that of the last modification as well as its current status. Also displayed are:

- The "History of modifications" shows:
  - the transaction dates
  - the various statuses through which the request has passed during the transactions made
  - the library's RP code and the librarian's first and last names, and
  - any comments made during the transactions

- "History of documents captured in local catalogues"
- "The history of notices to patron" showing:
  - the dates of the notices
  - the means of transmission (agent)
  - the body of the message

- "The history of interlibrary communications" showing:
  - the dispatch dates
  - when the correspondence was read
  - the sent/received status
  - the subject of the correspondence

- "Invoicing", that shows:

```plaintext
<table>
<thead>
<tr>
<th>Date</th>
<th>Agent</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.07.07</td>
<td>E-Mail</td>
<td>Notice to patron: document to be collected</td>
</tr>
</tbody>
</table>
```
"Processed", followed by a date, being that on which the request was booked for invoicing. That date is set the moment the status of the request becomes "Dispatched".

"Booked", followed by a date, which is the one on which the request was invoiced. If instead of the date what appears is "Every 6 months", this means that the request will be invoiced during the next (semi-annual) invoicing period, though only if the total amount of requests being invoiced is more than Frs. 20.- (which corresponds to at least 10 requests).

Please note : a request with 'Request Rejected' status will be billed at Frs 2.-, but its status can be changed (i.e., it can be reintroduced into the circuit for requests in progress, see Chapter 8. ‘Capturing new documents’). The cost invoiced will be for a single request in such a case. On the other hand, if the status of the request is "closed", its status cannot be changed.
13. Interlibrary communications

Communications between requesting and supplying libraries are related to a loan request.

Interlibrary communications are displayed in the table of patron requests as messages: "x new communication(s)".

To read and reply to the message(s):

- Click on the "Patron requests" link
- In the "Filter by" pop-up menu, select the "New Communications" filter.
- Check a request.
- Click on 🗣 Communicate.

The following screen appears:

Unread communications are displayed. To reply to the message:

- Click on the subject of the unread message.

A new window opens:
→ Click "Reply".

A new screen appears:

→ Fill in the "Message" field to advise the responder library that the message has been seen and read.

→ Click "Send".

→ Click "Close".

Refreshing the list again updates the data displayed:
Click "Continue" to finish.

The communication will appear as "Read On <date>". It can also be viewed in the "History of the request" (see Chapter 12. History of a request).
14. How to unlock a request

*ILL RERO* requests are locked as soon as an editing or change of status command is chosen (this includes printing the order form). If the Internet browser window is closed or exited without using the *ILL RERO* 'Quit' command, the request remains locked. This is also the case if the PC must be rebooted for any reason.

In the patron request and library request tables, the padlock is visible after which serves for selecting or de-selecting requests:

- the open black padlock denotes that the request is editable.
- the locked red padlock denotes that the request is locked, meaning that no action can therefore be taken on the request.

A request can be unlocked by going to the "Services" menu, choosing 'Special', and then 'Locked requests'. This command makes it possible to list all the requests locked by a user and to unlock them, for all past and present sessions.
15. Archiving a request

The action of archiving a request means that it is definitively closed.

A request is automatically archived when its status becomes "Request closed" (see Chapter 6. How to close a request).

A request can also be archived using the request form, via the "Next Action" field:

➔ In the "Next Action" field, select "Archive Request"

➔ Click "Continue".

The request is automatically archived. In the table of patron requests, archived requests can be accessed via the "Archives" function.

The request can also be archived as follows:

➔ Check the request number in the table of requests.

➔ Click ☀ Change status.
The following screen appears:

- Select the "Request Archived" status. The "Comments" field is optional.
- Click the "Change" button.

The request is archived. Archived requests can be accessed in table of patron requests via the 'Archives' function.

**Note:** All requests that remain unchanged for 6 months or more are closed, if necessary, and archived automatically. These requests can no longer be viewed and are not brought up during searches.
16. Batch processing

The batch processing command makes it possible to change the status of a batch of requests rapidly, irrespective of their current status, but only if a document has been captured. This does not apply to the "Change Status" command, which verifies the current status before the change to the new status; if there is no authorization, the status of the request does not change and no error message is shown.

There are two ways of inputting request numbers:

1. by scanning the bar code on the order form
2. by manually typing in the request numbers, whether individually or as a list.

The requester library should use batch processing at least for receiving documents or for sending the notice to the user.

In the 'Patron requests' menu, click the 'Batch processing' link. The following screen appears:

This command can also be used to:

- validate the request number as well as the library processing that request, depending on the new status. Any error when sending a work or order form will trigger a sound alert and the request is shown in red on the list.
- change to the new status irrespective of the current request status.
- display confirmation of the change to 'Returned document received' status.
- during processing, periodically display on the page (selection, change, notice, save) the stage reached. You are strongly urged to use batch processing to change the status, as that will ensure that the results as well as the PDF file will be available even if the number of requests selected is more than 30.
- Display on the results page a list of requests whose status cannot be changed (mainly because they are locked by another session). It is possible to copy this list for subsequent processing, thanks to a text field via which such a list can be quickly entered.

The change of status comprises four steps:

1. reading or inputting the request numbers  
2. selecting a new status to be applied to each available (unlocked) request  
3. changing the available requests to the new status  
4. results of changes, with details of the notices generated and list of unavailable requests

Step 1: Inputting request numbers

The input page contains three distinct fields: the field for inputting request numbers, the list of requests entered, and the field for editing the details of the selected request:
1. **Field for inputting request numbers**

The **blue field** allows you to enter a request number, either using the bar code reader or your keyboard. If it is done via the keyboard, it must be validated with the Return or Enter key. Validation is automatic when the bar code reader is used. The input field is the default field when the page is refreshed, and should be automatically selected.

![Add to list](image)

The **orange field** allows you to delete a request from the list. Press the Return or Enter key to validate and delete the request from the list.

![Remove from list](image)

To input a list of request numbers, click on "**Add a text field**".

![Add a text field](image)

Each request number must be followed either by a white space, a comma, or a hard return, for example:

- 12345, 22336, 125631, 7895
- 12345 22336 125631 7895
- 12345 22336 125631 7895

2. **List of requests entered**

The list of requests is displayed backwards, in other words, the top line shows the last request added. The number, type and status of the request, as well as the due date of the material are shown. Requests that cannot be processed by the library are indicated by a red background and, if your PC has a sound card, by a brief sound alert. A request that is scanned or entered several times is added only once.

The details of a request may be edited by clicking on its number in the list.

![Remove All](image)

<table>
<thead>
<tr>
<th>#</th>
<th>Type</th>
<th>Status</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>00172434</td>
<td>M</td>
<td>Document Sent</td>
<td>09.02.05</td>
</tr>
<tr>
<td>00171859</td>
<td>M</td>
<td>Document Sent</td>
<td>09.02.05</td>
</tr>
<tr>
<td>00170159</td>
<td>M</td>
<td>Document Sent</td>
<td>10.02.06</td>
</tr>
<tr>
<td>00175217</td>
<td>M</td>
<td>Document Sent</td>
<td></td>
</tr>
</tbody>
</table>
3. Field for editing the details of the request selected

Using this editing field, you may quickly add certain details that are useful for notices to users and which have not been entered by the requester library. These details are:

- checkout date
- due date
- call number and 2nd call number
- cost for patron and requester library

The [OK] button allows you to validate and save the changes. When a request is locked, an error message is shown. To avoid altering the details of the request, you need merely click the [Cancel] button.

Step 2: Choosing the new status

This page shows the various statuses available for the requester library:

- Document received
- Patron notified: doc. to be picked up
- Document returned
ILL RERO Tutorial
Non-RERO Libraries

*ILL RERO* automatically selects as the default status the one that logically corresponds to the stage reached by the request, for example: if the documents have been sent by the responder library, the "Document received" status will be selected.

The selected status can be applied irrespective of the current status of the requests.

**Step 3: Processing**

The processing page is periodically refreshed as status changes take place, and as notices are generated and sent by e-mail.

It contains the number of requests entered in step 1. It also shows the number of requests available and those that cannot be accessed (requests locked by another session).

---

**Batch Processing: Batch Processing...**

New Status: Document Received

Changing the status of 63 selected requests.

63 requests are in processing.

Saving changes... please wait.

---

Once the list of available requests has been composed, processing is rapid, and in most cases the messages are displayed briefly.

*Note: Once processing has begun, it cannot be stopped. You will have to wait for the results page to appear.*

**Step 4: Results**

The results page contains the number of successfully changed requests.

---

**Batch Processing: Results**

Close Window

There are 63 ILL requests which have been successfully changed.
17. Table of services

In the main menu (see paragraph 3.2 for all the functions displayed in this menu), select the "Services" menu.

> Menu  Help | Home | Patron Requests | Services | RERO Union Catalogue

The following screen appears:

![Services Screen](image)

17.1 Services displayed

17.1.1 The ‘Libraries’ service

On the one hand, this service provides information pertaining to the library that is connected to ILL RERO, and on the other, makes it possible to search libraries on the RERO Network registered with ILL RERO.

17.1.2 The ‘Statistics / Export’ service

This service allows you either to display statistics or to export the breakdown of ILL RERO invoicing for a given period.

The "Simple statistics" service allows you to calculate the number of requests that will be invoiced at the end of the current invoicing period.

The "Invoice détail of ILL RERO for a given period" function makes it possible to export the ILL RERO requests billed by RERO to a text file in CSV format, for a given invoicing date. Once this command is selected, the new page shows the list of dates for which RERO has issued an invoice. Select a date, then click the "Generate" button.
The file generated contains the following information for each request:

1. request number
2. type of request
3. creation date
4. date when processed for invoicing

The data are sorted by processing date.

An invoice is sent only if the amount is equal to or more than Frs 20 (or 10 requests). In the other cases, the amount is carried forward to the next invoicing period.

17.1.3 Special

The ‘Locked requests’ command makes it possible to list all the requests locked by a user and to unlock them, for all past and present sessions.

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ANNEX 1: The routing of a request for material for requester and responder libraries.

1. The requester library makes a new request for material.

2. Once the material is captured, the request status becomes "Dispatched" for the requester library.

3. To the responder library, the request appears with the "New" status.

4. The responder prints out the order form. The request then acquires the "Document ordered" status at the responder library, and "In process" or "In process (R)" at the requester library.

5. Once the material is sent, the responder library changes the status of the request to "Document sent". The same status appears for the requester library.

6. When the material is received, the requester changes the status of the material to "Document received". This same status also appears for the responder library.

7. The requester library then notifies the patron, and changes the status of the request to "Patron notified". The status does not change for the responder library, where it remains "Document received".

8. Once the document is returned by the user and is ready to be sent back to the responder library, the requester library changes the status of the request to "Document returned". This same status also appears at the responder library.

9. After receiving a returned document, the responder library can then select the "Returned document received" status, the effect of which is to automatically file the request ("Request terminated" status), at both requester and responder libraries.
ANNEX 2: The routing of a request for a copy of an article for requester and responder libraries.

1. The requester library makes a new request for photocopies.

2. Once the material is captured, the request acquires the "Dispatched" status for the requester library.

3. To the responder library, the request appears with the "New" status.

4. The responder prints out the order form. The request then acquires the "Document ordered" status at the responder library, and "In process" at the requester library.

5. Once the material is sent, the responder library changes the status of the request to "Document sent", which also automatically files it. At the requester library, the request simply changes to the "Document sent" status, without being filed.

6. When the requester library receives the copies, it changes the status of the request to "Document received", which action files it ("Request terminated" status).
**Expéditeur [lac1]**
Bibliothèque cantonale et universitaire  
Prêt entre bibliothèques  
Siège de Dorigny (La C1)  
1015 Lausanne–Dorigny

**Adresse de livraison [−]**
Cycle d'Orientation de Saint–Guérin  
Bibliothèque  
Avenue du Petit–Chasseur 43  
1950 Sion  
Suisse

BCU/Dorigny utilise le module de prêt de Virtua

<table>
<thead>
<tr>
<th><strong>Bibliothécaire</strong></th>
<th><strong>Créé</strong></th>
<th>08.11.2005 15:46</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Demandé</strong></td>
<td>08.11.2005 15:47</td>
<td></td>
</tr>
<tr>
<td><strong>Modifié</strong></td>
<td>08.11.2005 15:49</td>
<td></td>
</tr>
</tbody>
</table>

**ISO 10160/10161**

<table>
<thead>
<tr>
<th>Service</th>
<th>Prêt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Monographie</td>
</tr>
<tr>
<td>Bibliothèque</td>
<td>Bibliothèque du CO St–Guérin Sion [−]</td>
</tr>
</tbody>
</table>

**Commentaires**

**Monographie**

<table>
<thead>
<tr>
<th>Auteur</th>
<th>Proust, Marcel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Titre</td>
<td>Par les yeux de Marcel Proust / choix et montage des textes: Anka Muhlstein</td>
</tr>
<tr>
<td>Lieu / Date</td>
<td>Paris : Denoël, 1971</td>
</tr>
</tbody>
</table>

**Localisation**

<table>
<thead>
<tr>
<th>Localisation</th>
<th>BCUD magasins .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dépôt</td>
<td>BCUD magasins .</td>
</tr>
<tr>
<td>Code à barres</td>
<td>1092001402</td>
</tr>
<tr>
<td>Cote</td>
<td>FA 9151</td>
</tr>
</tbody>
</table>

**Bordereau**

<table>
<thead>
<tr>
<th>Prêté le</th>
</tr>
</thead>
<tbody>
<tr>
<td>Echu le</td>
</tr>
<tr>
<td>Cote fournie</td>
</tr>
<tr>
<td>Remarques</td>
</tr>
</tbody>
</table>
**ANNEX 4: Statuses of a request from creation to archiving.**

Below is the "standard" chronology of request statuses:

<table>
<thead>
<tr>
<th>Requester [ep3]</th>
<th>Responder [ab1]</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>Dispatched</td>
<td>New</td>
</tr>
<tr>
<td>Dispatched… (1)</td>
<td>New</td>
</tr>
<tr>
<td>Request rejected (2)</td>
<td>Document ordered or Document reserved</td>
</tr>
<tr>
<td>In process or In process (R)</td>
<td>Document sent</td>
</tr>
<tr>
<td>Document sent [ab1]</td>
<td>Document sent</td>
</tr>
<tr>
<td>Document received [ab1]</td>
<td>Document received by [ep3]</td>
</tr>
<tr>
<td>Patron notified [ab1]</td>
<td>Document received by [ep3]</td>
</tr>
<tr>
<td>Document returned [ab1]</td>
<td>Document returned by [ep3]</td>
</tr>
<tr>
<td>Returned document received [ab1]</td>
<td>Returned document received [ep3]</td>
</tr>
<tr>
<td>Request terminated (3)</td>
<td></td>
</tr>
<tr>
<td>Request archived (4)</td>
<td></td>
</tr>
</tbody>
</table>

(1) The ellipsis indicates that the first request was denied.
(2) The request is denied when the list of captured documents has been exhausted.
(3) (4) These statuses are automatically assigned when the request status becomes "Returned document received".

NB: The "Returned document received" status can be applied only to material with "Document received", "Patron notified" or "Document returned" status (see chronology). This means that the requester library must change the status, failing which the request will retain the "Document sent" status.
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