

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> ; subsequent connections can be made starting with the RERO Union Catalogue (<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> , which reactivates the cookies in question and again enables access to ILL RERO through the RERO Union Catalogue (<http://opac.rero.ch>).*

2.1 Access via the URL <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>, the following screen appears:

The screenshot shows a web browser window titled "ILL RERO - Prêt entre bibliothèques - Microsoft Internet Explorer". The address bar shows "http://ill.rero.ch". The page content is titled "RERO ILL Access" and includes a link "Remind me of my access codes". The form contains the following fields and options:

- Library: (Library Code: e.g. la8, ne13, vsch--)
- Access Code:
- Password:
- Language: (dropdown menu)
- ☒ Save library, access code and language for future logins
-

Below the form, a note states: "Note: cookies and JavaScript must be enabled for ill.rero.ch."

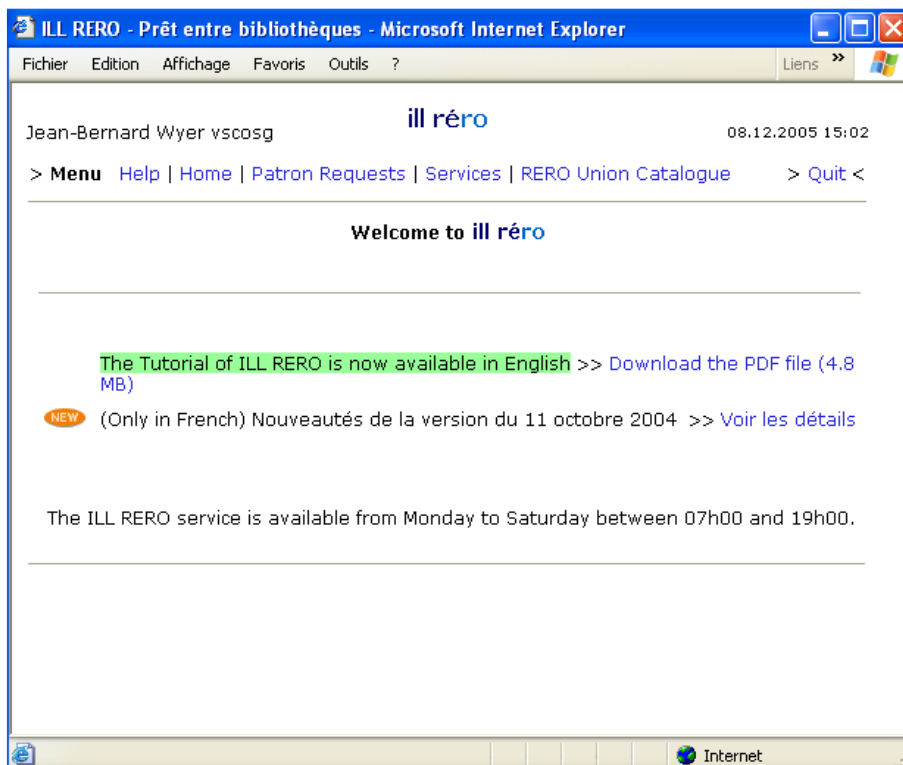
- ➔ Enter the RP code (for Swiss libraries) or the library's symbol code, the access code and password on the form.

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.

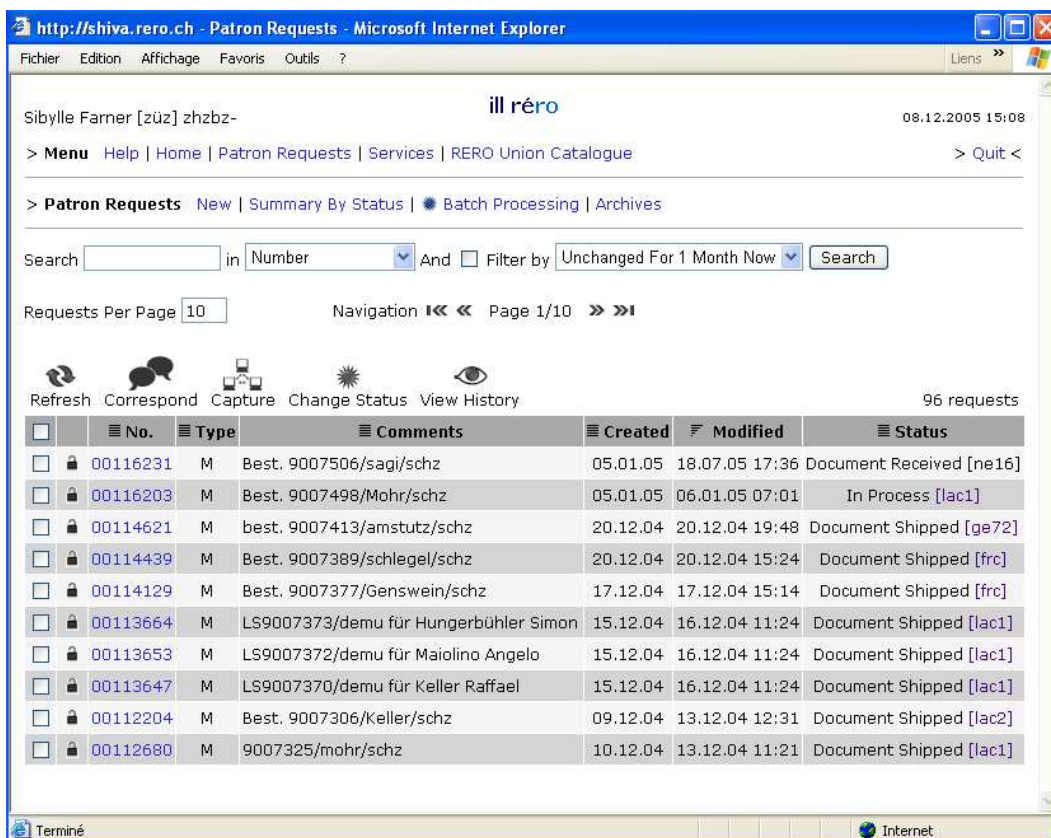
➔ Click the 'Enter' button.

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:

The screenshot shows the RERO union catalog interface. The top navigation bar includes 'Fichier', 'Edition', 'Affichage', 'Favoris', and 'Outils'. The main header displays the 'réro union catalog' logo. A left sidebar contains a menu with options: Search, Simple, Advanced, Personal work space, Cart (0), Search history, Other RERO catalogues, Other resources, Online services, and Interlibrary loan. The main content area shows a search result for 'donne follia'. The record details are as follows:

Author	Totola, Giorgia
Title	Donne e follia nell'epica romana : Virgilio, Ovidio, Lucano, Stazio / Giorgia Totola
Place / dates	Milano : Mimesis, 2002
Material	86 p. ; 21 cm + 1 CD-ROM
Series	Mimesis
ISBN / Price	8884830834
Subject	femme – folie – poésie épique latine
Subject	femme – folie – Virgile. "Enéide"
Subject	femme – folie – Ovide. "Métamorphoses"
Subject	femme – folie – Lucain. "Pharsale"
Subject	femme – folie – Stace. "Thébaïde"
Subject	femme – poésie épique latine – possession (religion)
FRIBOURG	BCU - Centrale et Université [Fr C]
RERO no	R003331481
Series	Mimesis

Below the record details, there are two buttons: 'Save selection to cart' and 'Interlibrary loan'.

At the bottom right, the RERO logo is displayed along with the text: 'All rights reserved © 2007, RERO' and 'Powered by: iPortal, VTLS Inc'.

➔ Click the "Interlibrary loan" button: the screen shown below appears.

ILL RERO - Prêt entre bibliothèques - Microsoft Internet Explorer

Fichier Edition Affichage Favoris Outils ?

RERO ILL Access

[Remind me of my access codes](#)

Library (Library Code: e.g. la8, ne13, vscn--)

Access Code

Password

Language

☒ Save library, access code and language for future logins

Note: cookies and JavaScript must be enabled for ill.rero.ch.

Internet

If the following screen appears instead, you must first connect correctly with your access codes to <http://ill.rero.ch> (see 2.1 Access via the URL <http://ill.rero.ch>):

ILL-RERO - Formulaire pour les lecteurs - Mozilla Firefox

rezo Union catalog

réro

Inter-Library Loan

Thursday, 19.07.2007

[Help](#) | [RERO Union Catalogue](#)

New Connection

Patron Barcode

Password

Unified ILL tariffs

The libraries members of the Library Network of Western Switzerland (RERO) decided to harmonize their tariffing.

Thus, since **1st January 2005**, the following fees will be applied:

Document provided by a library, member of RERO	CHF 3.- for each volume
Document provided by another library network, or a Swiss library according to the tariffs applied to RERO libraries	between CHF 3.- and CHF 10.- for each volume (eg: IDS Swiss German Library Network)
Copies of an article	CHF 8.- for each article up to 20 pages CHF 0.20 for each extra page
Inter-library loan not picked up	extra fees CHF 10.- for each volume or copie

For documents coming from a foreign library, requests are treated according to the practice in each library.

Terminé

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 :

New Request: Monograph

Monographie

Author Totola, Giorgia
Title Donne e follia nell'epica romana : Virgilio, Ovidio, Lucano, Stazio / Giorgia Totola
Link / Series Mimesis
Place And Date Milano : Mimesis, 2002
Edition -
RERO No. R003331481

Copies ☐ Request for copies:
Title Of Article
Author Of Article
Pages

Deadline (Format: 31.12.2004)
Comments

Note: Continue with capture of items

... if you are requesting a periodical article:

New Request: Copy Of Article

Serial

Title of periodical Bulletin / CRIA, Centre romand d'information agricoles
ISSN -
RERO No. 0147909
Title Of Article
Author Of Article
Year **Volume** **Issue** **Pages**

Loan ☐ Want to loan the document
Deadline (Format: 31.12.2004)
Comments

Note: Continue with capture of items

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.

[Remind me of my access codes](#)

The following screen appears:

The screenshot shows a web browser window titled "ILL RERO - Prêt entre bibliothèques - Microsoft Internet Explorer". The page has a menu bar with "Fichier", "Edition", "Affichage", "Favoris", "Outils", and "?". The main heading is "Requesting Access Codes For My Library". Below this, there is explanatory text: "The access code will be sent **automatically** by e-mail to your library if the provided below informations are correct and match a known library. A notification message will be display to inform you which e-mail addresses have been selected." There are three distinct sections for data entry, each with a "Send" button: 1. "I know the library's e-mail or mine:" with an "E-mail" input field. 2. "I know the RP library's code and the zip code of my library:" with "RP Code" and "Zip Code" input fields. 3. "I know the telephone number and the zip code of my library:" with a "Telephone Number" input field (with a note: "Please enter only the last 4 digits without white spaces.") and a "Zip Code" input field. At the bottom of the form area, there is a link: ">> Send A Request To RERO <<". The browser's status bar at the bottom shows "Internet".

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.

Patron Requests - Microsoft Internet Explorer

ill réro

08.12.2005 16:27

> **Menu** | [Help](#) | [Home](#) | [Patron Requests](#) | [Services](#) | [RERO Union Catalogue](#) > Quit <

> **Patron Requests** | [New](#) | [Summary By Status](#) | [Batch Processing](#) | [Archives](#)

Search in [Number](#) And ☐ Filter by [Unchanged For 1 Month Now](#)

Requests Per Page Navigation [«](#) [«](#) Page 1/15 [»](#) [»](#)

148 requests
2 new communication(s)

Refresh Correspond Capture Change Status View History

<input type="checkbox"/>	No.	Type	Comments	Created	Modified	Status
<input type="checkbox"/>	00116409	M*	Rui Mélanie	06.01.05	06.01.05 17:22	Dispatched [frc]
<input type="checkbox"/>	00116363	M	Aebi Thomas	06.01.05	06.01.05 15:54	Dispatched [ge89]
<input type="checkbox"/>	00114584	P*	Woltsche Heinz	20.12.04	06.01.05 12:59	Request Rejected
<input type="checkbox"/>	00116286	P*	Jenny Rudolf s.v.p. tous les volumes	06.01.05	06.01.05 10:46	Dispatched [ge3]
<input type="checkbox"/>	00115570	M	Bianchi Nicolas	30.12.04	04.01.05 12:17	Document Shipped [lac1]
<input type="checkbox"/>	00115367	M	Marantz Beba	27.12.04	30.12.04 10:31	Document Shipped [sic]
<input type="checkbox"/>	00115137	M	Ramos Mac 1372	23.12.04	29.12.04 15:48	Document Shipped [la70]
<input type="checkbox"/>	00115456	M	Gabler Silvia	28.12.04	29.12.04 08:04	In Process [frc]
<input type="checkbox"/>	00114922	M*	Schüpbach Marianne 1364	22.12.04	27.12.04 15:51	Document Shipped [frc]
<input type="checkbox"/>	00115339	P	Marantz Beba	27.12.04	27.12.04 15:02	Request Rejected

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

> Patron Requests [New](#) | [Summary By Status](#) | [Batch Processing](#) | [Archives](#)

- The **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.

☐ Filter by Unchanged For 1 Month Now ▼

- Modified 1 Month Ago ▼
- Modified 48 Hours Ago
- Modified 7 Days Ago
- Modified 1 Month Ago
- Unchanged For 1 Month Now
- New
- Approved
- Dispatched
- Request Rejected
- Research Request @ SNL
- In Process
- Document Sent
- Document Received
- Patron Notified
- Document Returned
- Conditional Loan
- Request Closed
- Renew
- Renew Accepted
- Renew Refused
- Recall
- New Communications

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



- ➔ : the **Refresh** button allows update of data in the table (updating is not automatic)
- ➔ : the **Correspond** button allows communication between libraries. You must select a request.
- ➔ : 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.
- ➔ : 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.
- ➔ : 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)

<input type="checkbox"/>	No.	Type	Comments	Created	Modified	Status
<input type="checkbox"/>	00116409	M*	Rui Mélanie	06.01.05	06.01.05 17:22	Dispatched [frc]
<input type="checkbox"/>	00116363	M	Aebi Thomas	06.01.05	06.01.05 15:54	Dispatched [ge89]
<input type="checkbox"/>	00114584	P*	Woltsche Heinz	20.12.04	06.01.05 12:59	Request Rejected
<input type="checkbox"/>	00116286	P*	Jenny Rudolf s.v.p. tous les volumes	06.01.05	06.01.05 10:46	Dispatched [ge3]

- : 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.

The screenshot shows the RERO Union Catalogue interface. On the left is a navigation menu with options like Search, Personal work space, Cart, Search history, Other RERO catalogues, Other resources, Online services, and Interlibrary loan. The main area displays search results for 'accad, e'. The first record is selected, showing details for the book 'Des femmes, des hommes et la guerre' by Evelyne Accad. The record includes fields for Author, Title, Place / dates, Material, Series, Note, ISBN / Price, Subject, and a list of libraries (GENEVA, NEUCHATEL, VAUD) where the book is available. The RERO number 1705482 is highlighted.

Author	Accad, Evelyne
Title	Des femmes, des hommes et la guerre : fiction et réalité au Proche-Orient / [Evelyne Accad] ; avant-propos d'Andrée Chedid ; préf. de Kathleen Barry
Place / dates	Paris : Côté-femmes, 1993
Material	234 p. ; 22 cm
Series	Femmes et changements
Note	Version française, augmentée d'un chapitre, de l'ouvrage paru en anglais sous le titre "Sexuality and war"
ISBN / Price	2907883650
Subject	guerre — littérature — sexualité — Moyen-Orient — 20e s. (2e moitié)
Subject	monde arabe — roman (genre littéraire) — sexe (genre) - différence — violence — 20e s. (2e moitié)
GENEVA	Bibliothèque publique et univ. [Ge P]
NEUCHATEL	Bibliothèque Ville de La Chaux-de-Fonds [CF V]
VAUD	BCU/Riponne [La C2]
RERO no	1705482
Series	Femmes et changements

Buttons at the bottom: Save selection to cart, Interlibrary loan.

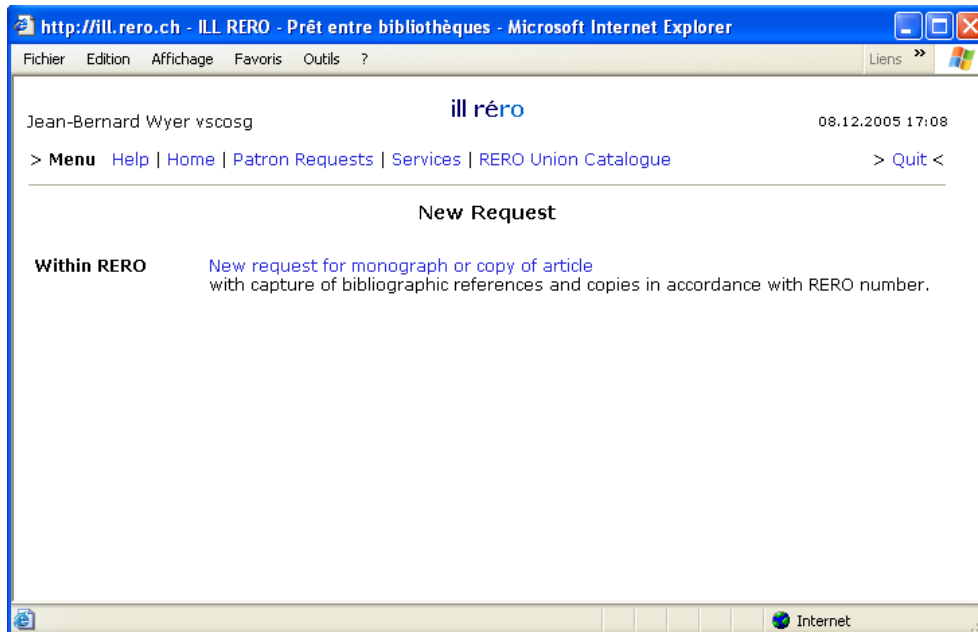
In this example, after searching the RERO Union Catalogue (above), *the RERO number is retrieved from the document's full record:*

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.

RERO number

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:

New Request: Monograph - Microsoft Internet Explorer

Fichier Edition Affichage Favoris Outils ? Liens >>

New Request: Monograph

Monographie

Author	Accad, Evelyne
Title	Des femmes, des hommes et la guerre : fiction et réalité au Proche-Orient / [Evelyne Accad] ; avant-propos d'Andrée Chedid ; préf. de Kathleen Barry
Link / Series	Femmes et changements
Place And Date	Paris : Côté-femmes, 1993
Edition	-
RERO No.	1705482

☐ Request for copies:

Copies

Title Of Article	<input type="text"/>
Author Of Article	<input type="text"/>
Pages	<input type="text"/>

Deadline (Format: 31.12.2004)

Comments

Note: Continue with capture of items

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):

Site	Library	Status	Call Number(s)	Order		Comments
GE	gep	Available - prêt standard	BPU TT 9516	None	(+) (-)	
VD	lac2	Available - Prêt 28 j.	RAA 51757	None	(+) (-)	
NE	cfv	ILL not accepted or under condition: BVCF Fonds Spéciaux Status: Non Circulating	CFV FV 77	None	(+) (-)	

Use the button (+) to choose the documents to be captured.

A reservation request will automatically be made for each work selected while on loan.

Cancel Continue Edit

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**;

History Of Documents Captured In Local Catalogues							
Order	Library	Requested On	Comments	Status	Replied On	With Reservation	Comments
1	[lac2] labcur	25.05.05 08:58		Dispatched			
2	[nev] nebpun	25.05.05 08:58		Queued			

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

and similarly: **M*** -> **M** and **P*** -> **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  **Change status**.

The following screen will appear:

The screenshot shows a web browser window titled "Change Status Of One Or Several Requests - Microsoft Internet Explorer". The browser's menu bar includes "Fichier", "Edition", "Affichage", "Favoris", "Outils", and "?". The address bar shows "Liens" with a right-pointing arrow. The main content area contains the text "Change the status of the following requests (1):". Below this is a table with three columns: "No.", "Status", and "Type". The table contains one row with the values "00109544", "Document Shipped", and "M". Under the table, there is a "New Status" label followed by a dropdown menu currently showing "Choose a Status". Below the dropdown is a "Comments" label followed by a text input field. At the bottom of the form are two buttons: "Cancel" and "Change". The status bar at the bottom of the browser window shows "Terminé" on the left and "Internet" on the right.

- ➔ 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:

The screenshot shows a web browser window with the title 'http://shiva.rero.ch - Change Status Of One Or Several Requests - Microsoft Interne...'. The browser's menu bar includes 'Fichier', 'Edition', 'Affichage', 'Favoris', 'Outils', and '?'. The address bar shows 'Liens' and a right-pointing arrow. The main content area has the heading 'Change the status of the following requests (1):'. Below this is a table with three columns: 'No.', 'Status', and 'Type'. The table contains one row with the values '00116231', 'Document Received', and 'M'. Under the table, there is a 'New Status' label followed by a dropdown menu currently showing 'Choose a Status'. Below the dropdown is a 'Comments' label followed by a text input field. At the bottom of the form are two buttons: 'Cancel' and 'Change'. The browser's status bar at the bottom shows 'Terminé' on the left and 'Internet' on the right.

➔ 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.

The screenshot shows a web browser window titled "New Request: Copy Of Article - Microsoft Internet Explorer". The page content is titled "New Request: Copy Of Article". It features a form with the following fields and options:

- Serial** (header)
- Title of periodical**: Bulletin des bibliothèques de France : BBF / publ. par la Direction des bibliothèques et de la lecture publique
- ISSN**: 0006-2006
- RERO No.**: 0055315
- Title Of Article**: (empty text box)
- Author Of Article**: (empty text box)
- Year**: (empty text box)
- Volume**: (empty text box)
- Issue**: (empty text box)
- Pages**: (empty text box)
- Loan**: ☐ Request for loan of document
- Deadline**: (empty text box) (Format: 31.12.2004)
- Comments**: (empty text area)
- Buttons**: "Cancel" and "Continue"
- Note**: "Note: Continue with capture of items"

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):

Capture Of Documents - Microsoft Internet Explorer

Fichier Edition Affichage Favoris Outils ?

Capture Of Documents For Request 00175715

Details Of Article

Title Of Article Longévité et mobilité
Author Of Article Albert Poirot
Year 2005 **Volume** **Number** 3 **Pages** 16-21

Documents for RERO reference No.0055315 found in local catalogues

Site	Library	Holding	Call Number(s)	Order		Comments
NE	cfv	Conservé 2 ans	CFV Bureau Périodiques	None	+	-
FR	frc	28 vol. [Bulletin de documentation bibliographique.] 1959 - t. 23(1978) Consultation sur place	BIBL-III-a-4	None	+	-
FR	frc	Année en cours sur le présentoir "Bibliothéconomie" Année 1(1956)-	KF 20	None	+	-
FR	frc	Année en cours sur le présentoir "Bibliothéconomie" Consultation sur place	KF 20	None	+	-
GE	ge33	Année 18(1973)-> 12 derniers mois en périodiques prof. Index 2004 Index 2005	SESP 197	None	+	-
GE	ge46	T. 38(1993)->	BAA PER Q 2421	None	+	-
GE	ge72	[2 dernières années.]	P 01/1	None	+	-
GE	ge72	Vol. 7(1962)->	P 01/1	None	+	-
GE	ge95	41,2-3+5-6(1996) 42,2(1997)-48(2003) T. 39(1994)-40(1995)	SEBP 584	None	+	-
GE	gep	Vol. 1(1956) - vol. 48(2003) Vol. 49(2004)- L'année courante est à consulter dans la Salle des périodiques, Section "Bibliothèque, livre"	BPU AA 3543	None	+	-
VD	la70	[Prêt exclu.] T. 32(1987) - t. 43(1998) T. 41 icpl.	PE 966	None	+	-
VD	la87	[Prêt exclu.] T. 27(1982) - t. 28(1983)	CA/F 8 f BUBF	None	+	-
VD	lac1	48 vol. Vol. 1(1956) - vol. 23(1978)	B 10313	None	+	-
VD	lac1	[Prêt exclu.] [Dernier numéro sur le présentoir "Bibliothéconomie".]	B 10313	None	+	-
VD	lac1	Vol. 24(1979)->	B 10313	None	+	-
VD	lac2	[Année en cours.] [Prêt exclu.]	RP 678	None	+	-
VD	lac2	T. 34(1989)- PAC 3	RP 678	None	+	-
NE	nev	24(1979)-> [Les 2 dern. nos au Cabinet des périod., case 0.7.]	BPUN PU 1239	None	+	-
NE	nev	1(1956)-23(1978)	BPUN PU 510	None	+	-
GE	ge30	ILL not accepted or under condition: 70 - FPSE : service référence T. 44(1999) - t. 47, no 1(2002)	FPEP 10043	None	+	-
VS	sic	ILL Service not supporter T. 28, no 6(1983)-> [Manque no 2(1995), n 1 tome 46 (2001) : épuisé]	BCV NB 1419	-		
GE	?	No Responder Library found: 98 - HEG : périodiques Année 2, no 1(1957) ; Année 6(1961) ; Année 10(1965)-36(1991) ; T. 37, no 5(1992)-50 (2005) [Lacunes.]		-		
GE	?	No Responder Library found: 07 - Bib. musicale Périod. gevbmu No 2(2002)	BMUP 104	-		

Use the button to choose the documents to be captured.


Cancel Continue Edit

Internet



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:

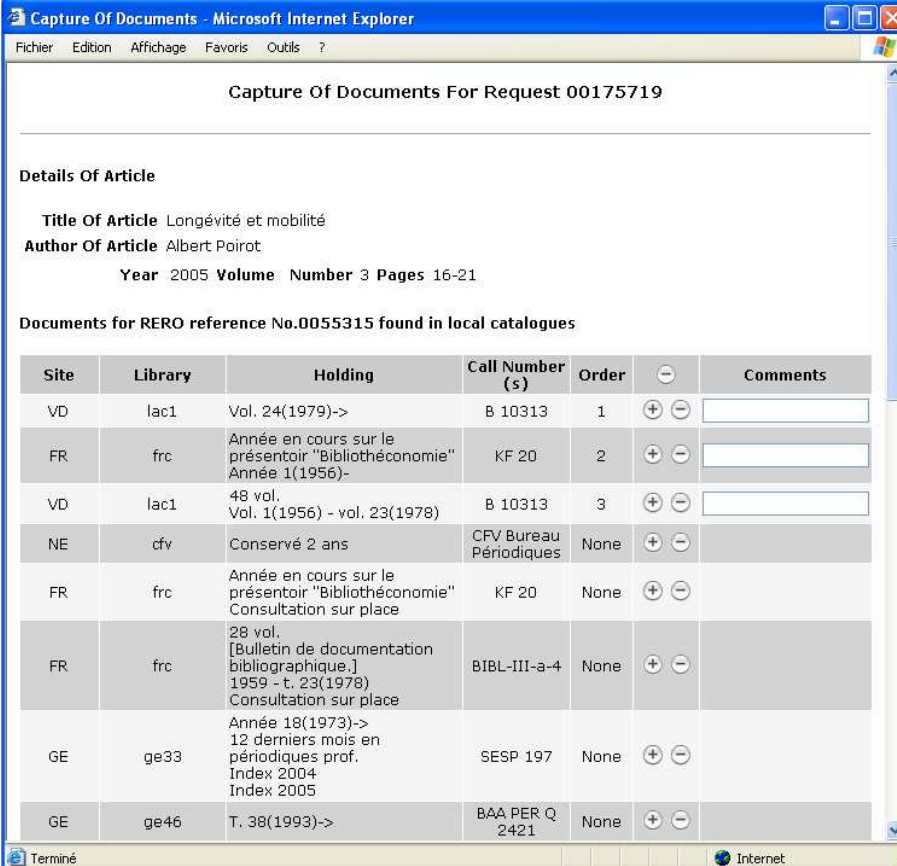
-  : Located on the first line, this button can be used to remove earlier choices from the order of priority of requests.

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 For Request 00175719

Details Of Article

Title Of Article Longévité et mobilité
Author Of Article Albert Poirot
Year 2005 **Volume** **Number** 3 **Pages** 16-21

Documents for RERO reference No.0055315 found in local catalogues

Site	Library	Holding	Call Number(s)	Order	 	Comments
VD	lac1	Vol. 24(1979)->	B 10313	1	 	
FR	frc	Année en cours sur le présentoir "Bibliothéconomie" Année 1(1956)-	KF 20	2	 	
VD	lac1	48 vol. Vol. 1(1956) - vol. 23(1978)	B 10313	3	 	
NE	cfv	Conservé 2 ans	CFV Bureau Périodiques	None	 	
FR	frc	Année en cours sur le présentoir "Bibliothéconomie" Consultation sur place	KF 20	None	 	
FR	frc	28 vol. [Bulletin de documentation bibliographique.] 1959 - t. 23(1978) Consultation sur place	BIBL-III-a-4	None	 	
GE	ge33	Année 18(1973)-> 12 derniers mois en périodiques prof. Index 2004 Index 2005	SESP 197	None	 	
GE	ge46	T. 38(1993)->	BAA PER Q 2421	None	 	

Terminé

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						
Order	Library	Requested On	Comments	Status	Replied On	With Reservation
1	[lac1] labud	25.06.04 08:53		Others...	28.06.04 11:33	envoyé avec le 80754
2	[ge46] gevbba	28.06.04 11:33		Request Granted	29.06.04 14:28	

- 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*".

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*":

The screenshot shows a web browser window with the title "http://shiva.rero.ch - Change Status Of One Or Several Requests - Micro...". The browser's menu bar includes "Fichier", "Edition", "Affichage", "Favoris", "Outils", and "?". The main content area is titled "Change the status of the following requests (1):". Below this title is a table with three columns: "No.", "Status", and "Type". The table contains one row with the values "00116048", "Document Shipped", and "M". Below the table, there is a "New Status" label followed by a dropdown menu currently showing "Choose a Status". Below the dropdown is a "Comments" label followed by a text input field. At the bottom of the form are two buttons: "Cancel" and "Change". The browser's status bar at the bottom shows "Terminé" on the left and "Internet" on the right.

No.	Status	Type
00116048	Document Shipped	M

New Status:

Comments:


➔ 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.

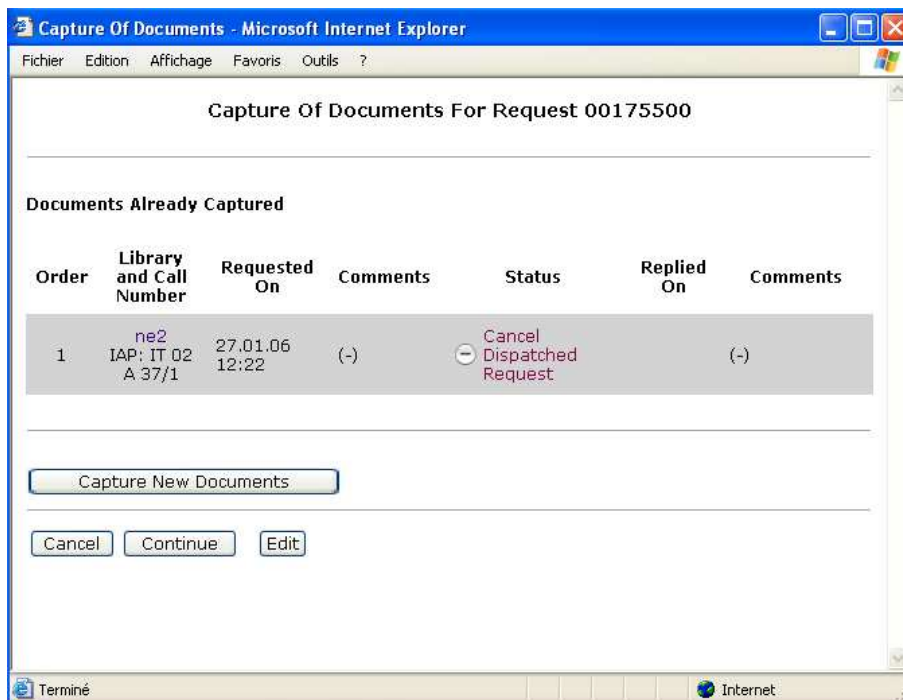
The closed request now disappears from the table of patrons and appears in the table of archived requests.


7. Cancelling a dispatched loan request to the responder

→ Tick the "Dispatched " loan request.

→ Click  **Capture**.

The following screen will appear:



→ 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.

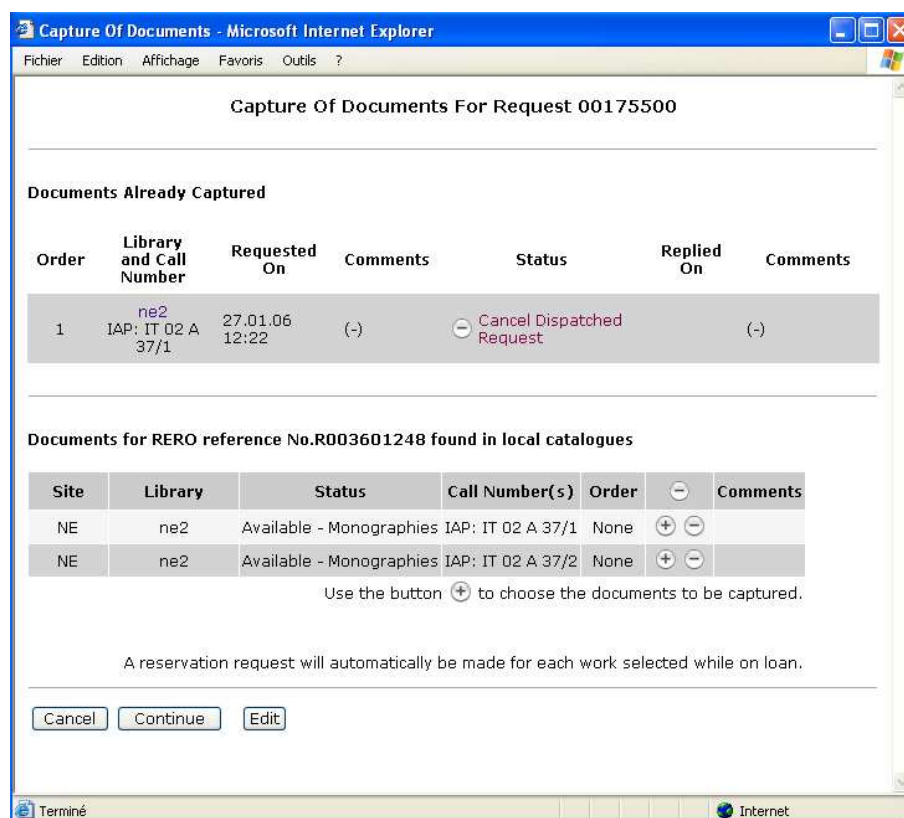
8. Capturing new documents

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

2. Click  **Capture**.

3. Click on "**Capture new documents**".

The following screen will appear:



Capture Of Documents For Request 00175500

Documents Already Captured


Order	Library and Call Number	Requested On	Comments	Status	Replied On	Comments
1	ne2 IAP: IT 02 A 37/1	27.01.06 12:22	(-)	Cancel Dispatched Request		(-)

Documents for RERO reference No.R003601248 found in local catalogues

Site	Library	Status	Call Number(s)	Order			Comments
NE	ne2	Available - Monographies	IAP: IT 02 A 37/1	None			
NE	ne2	Available - Monographies	IAP: IT 02 A 37/2	None			

Use the button to choose the documents to be captured.

A reservation request will automatically be made for each work selected while on loan.

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.

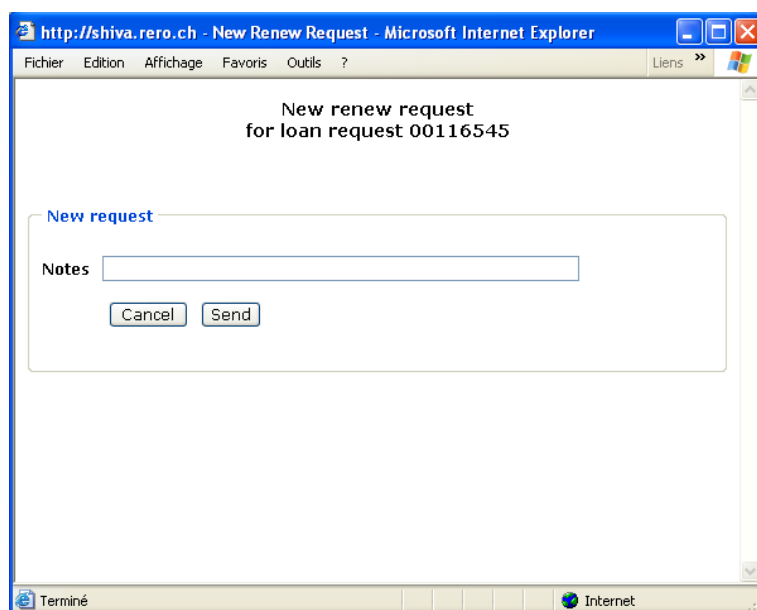
Depending on the filter chosen, the table of requests shows only requests with "*Document Received*", "*Patron notified*", or "*Document sent*" status.

- ➔ 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:



The screenshot shows a web browser window titled "http://shiva.rero.ch - New Renew Request - Microsoft Internet Explorer". The address bar shows "http://shiva.rero.ch". The page content is titled "New renew request for loan request 00116545". Below the title, there is a section labeled "New request" containing a text input field labeled "Notes". Below the input field are two buttons: "Cancel" and "Send". The browser's status bar at the bottom shows "Terminé" and "Internet".

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:

New Renew Request - Microsoft Internet Explorer

New renew request
for loan request 00166468

Previous renew requests

Date	Status	Notes
04.01.06 12:15	Renew (1)	(-)
04.01.06 13:22	Renew Accepted	(-)

New request

Notes:

Terminé Internet

→ 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:

http://shiva.rero.ch - History Of Modifications - Microsoft Internet Explorer

Request No. 00114739

>> Modifications >> Documents Captured >> Notifications To Patron >> Interlibrary Communications

Created 21.12.04 11:22 **Invoicing**

Last Modified 14.07.05 15:11 **Processed** 21.12.2004

Current Status Document Received **Entered** 07.01.2005

History Of Modifications

	Date	Status	... done by	Comments
1	21.12.04 11:23	New	[züt] Ketty Ciandrini	
2	21.12.04 11:26	Dispatched	[züt] Ketty Ciandrini	
3	21.12.04 14:56	In Process	[lac1] Alegria Ribeiro	
4	03.01.05 11:01	Document Shipped	[lac1] Danielle Laub	
5	05.01.05 17:15	Document Received	[züt] Ketty Ciandrini	
6	12.07.05 16:32	Renew (1)	[züt] Ketty Ciandrini	
7	13.07.05 10:12	Renew Accepted	[lac1] Beatrice Kamber Thiocone	
8	14.07.05 14:44	Renew (2)	[züt] Ketty Ciandrini	
9	14.07.05 15:11	Document Received	[züt] Ketty Ciandrini	

Internet

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.

http://shiva.rero.ch - Monograph Request 0103876 - Microsoft Internet Explorer

Monograph Request 0103876

>> Requesting Work

Author -

Title Mata Amritanandamayi : Mutter der unsterblichen Glückseligkeit : Leben und Lehre einer jungen indischen Weisen der heutigen Zeit / hrsg. von Amritatma Chaitanya ; [aus dem Englischen von Marion Zerbst]

Place and Date Interlaken : Ansata-Verl., 1989

Edition -

RERO # 1281792

Cost

> Details Of The Item

Library Mediathek Wallis, Brig

Barcode 1010081720

Call Number 929 AMRI

2nd Call Number BCV TA 50098

Localisation MW BRIG/Erwachsene

Depot MW BRIG/Erwachsene

Checkout Date 03.11.2004 (Format: 01.05.2003)

Due Date 10.01.2005 (Format: 01.05.2003)

Reservation Request No

Comments of the Requester Library e4864Mutter/ab

Conditional Loan Condition specified by the library Requester, it only appears on the notice under "Conditional Loan".

Comments e4864Mutter/ab

Current Status Renew Accepted

Next Action Choose An Action

Back Continue

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

Monographie

Author Accad, Evelyne
Title Des femmes, des hommes et la guerre : fiction et réalité au Proche-Orient / [Evelyne Accad] ; avant-propos d'Andrée Chedid ; préf. de Kathleen Barry
Link / Series Femmes et changements
Place And Date Paris : Côté-femmes, 1993
Edition -
RERO No. 1705482

☐ Request for copies:

Title Of Article
Author Of Article
Pages

Deadline (Format: 31.12.2004)

Comments

Note: Continue with capture of items

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):

<input type="checkbox"/>	No.	Type	Comments	Created	Modified	Status
<input type="checkbox"/>	00116583	M*	(-)	10.12.05	10.12.05 15:17	Dispatched [lac2]

The system automatically calculates the cost payable by the requesting libraries:

The screenshot shows a web browser window titled "Copies of Monograph Request 0116584 - Microsoft Internet Explorer". The URL is "http://shiva.rero.ch". The page content is as follows:

Copies of Monograph Request 0116584

Back

>> Request for Copies of Monograph

Author	Tadié, Jean-Yves
Title	Proust et le roman : essai sur les formes et techniques du roman dans "A la recherche du temps perdu" / Jean-Yves Tadié
Link / Series	Bibliothèque des idées. Gallimard
Place and Date	[Paris] : Gallimard, 1971
Edition	-
RERO #	0023223
Title Of Article	<input type="text"/>
Author Of Article	<input type="text"/>
Pages	53-68 = 16 <input type="button" value="Recalculate"/>
Cost	8.00

> Details Of The Item

Library	BCU/Dorigny
Barcode	1094209561
Call Number	TOA 1053
Localisation	BCUD magasins .
Depot	BCUD magasins .
Comments of the Requester Library	<input type="text"/>

Comments

Current Status Dispatched

Next Action Choose An Action

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

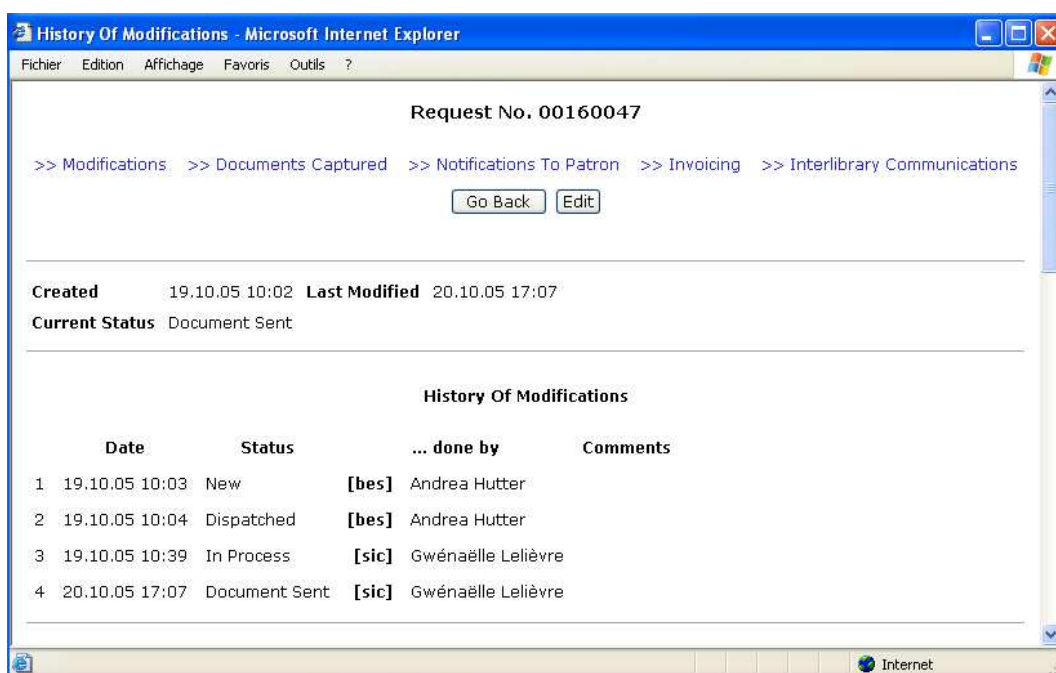
12. History of a request

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:



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"

History Of Documents Captured In Local Catalogues							
Order	Library	Requested On	Comments	Status	Replied On	With Reservation	Comments
1	[sic] vsbcvs	19.10.05 10:04		Request Granted	20.10.05 17:07		
2	[nev] nebpun	19.10.05 10:04		Queued			
3	[ne3] neusbo	19.10.05 10:04		Queued			
4	[ge3] gevcjb	19.10.05 10:04		Queued			
5	[frc] frbcuc	19.10.05 10:04		Queued			
Details of Captured Item							
Code bar of Document		1010639717	Call Number		BCV SN 28/2003,136		
Check Out Date		20.10.2005	2nd Call Number				
Due Date		17.11.2005	Depot		MV SION VERGERS/Magasin 5		
Sent Date		20.10.2005	Order Form		Printed		
NB: The shipped date is used to select requests for invoicing for Responder libraries (invoicing Requester libraries).							

- "The history of notices to patron" showing:
 - the dates of the notices
 - the means of transmission (agent)
 - the body of the message

History Of Notices To Patron		
Date	Agent	Message
13.07.07 10:54	E-Mail	Notice to patron: document to be collected

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

History Of Interlibrary Communications			
Sent On	Read On	Sent/Received	Subject
10.05.07 08:24	10.05.07 09:26	Sent to la102	réserveation?
10.05.07 09:26	10.05.07 09:29	Received from la102	Re: réserveation?
14.06.07 16:06	26.07.07 11:10	Received from la102	Ouvrage reçu sans date de prêt

- "Invoicing", that shows :

Invoicing	Processed: amount and date	Booked
Invoiced by <i>RERO</i> to <i>StUB Bern</i>	2.00, on 19.10.2005	05.01.2006
Invoiced by <i>Médiathèque Valais, Sion</i> to <i>StUB Bern</i>	Amount not defined, not processed yet.	Every month.

- "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

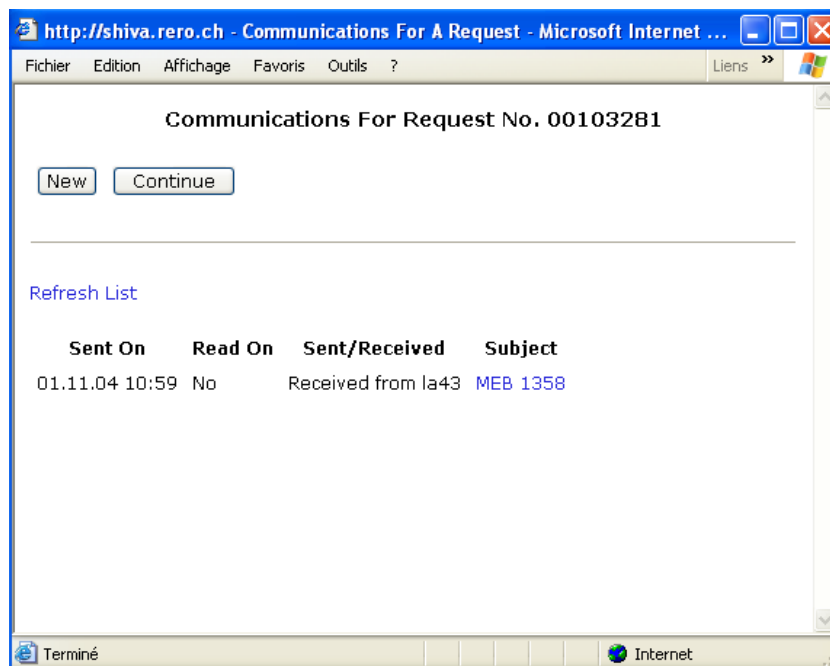
Communications between requesting and supplying libraries are related to a loan request.

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**.

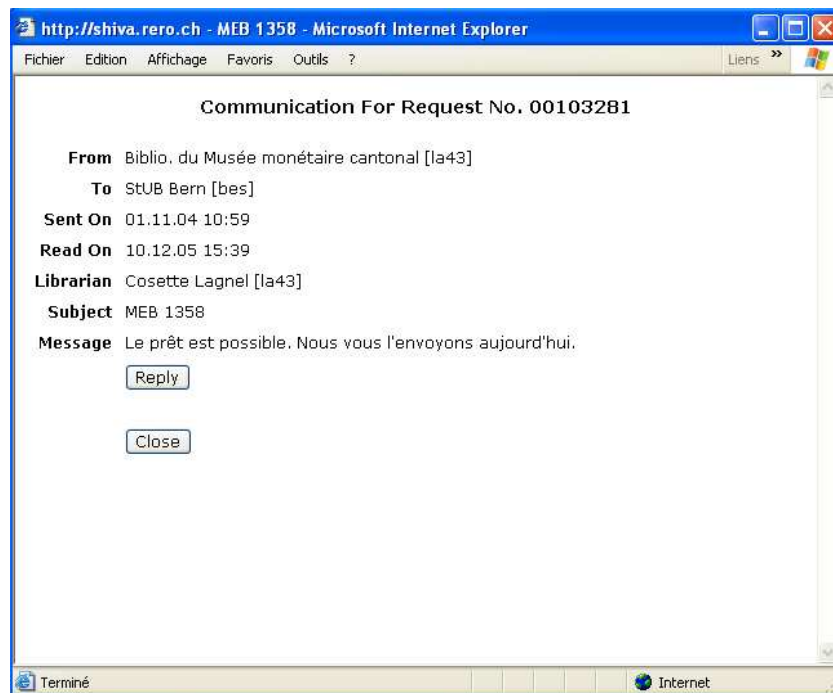
The following screen appears:



Unread communications are displayed. To reply to the message:

- ➔ Click on the subject of the unread message.

A new window opens:

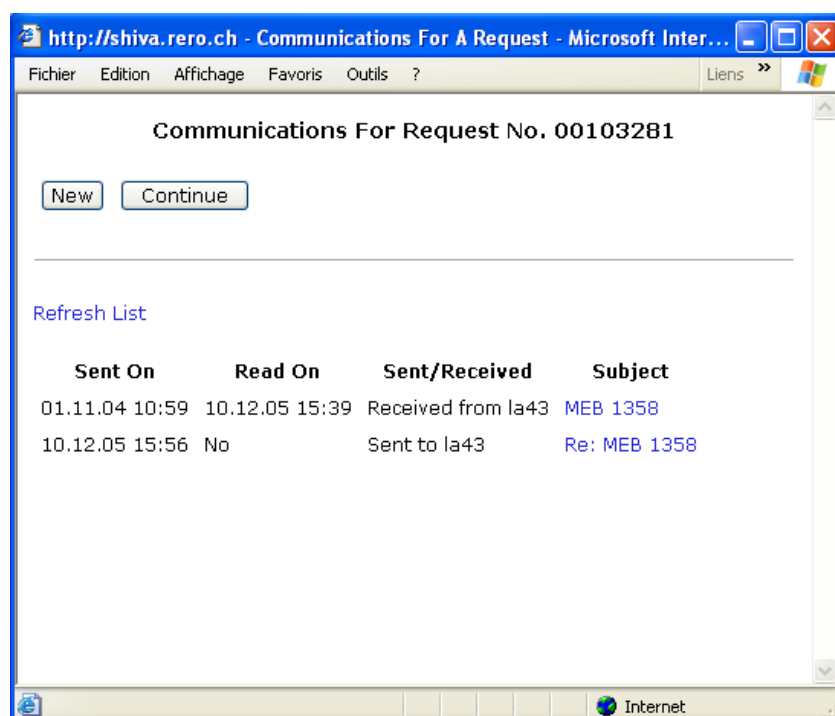


→ Click "**Reply**".

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*"

Serial Request 0171925

>> Request For An Article

Title Of Serial	Asian affairs : journal of the Royal Society for Asian Affairs		
ISSN	-		
RERO #	0054985	Change	Changes the RERO bibliographic reference number. Union Catalogue RERO
Title Of Article	Kashmir: a tale of two valleys		
Author Of Article	Evans, Alexander		
Year	2005	Volume 92 (AS)	Number 1 Pages 35-47 = 13 Recalculate
Cost For Patron	8.00		
Cost For Library	Will be calculated automatically by the Responder Library.		

Comments: Leser: Girardin, Ch.

Current Status: Request Rejected

Next Action: Archive Request

Back Continue

➔ 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:

http://shiva.rero.ch - Change Status Of One Or Several Requests - Microsoft Inte...

Fichier Edition Affichage Favoris Outils ? Liens >>

Change the status of the following requests (1):

No.	Status	Type
00108478	Request Rejected	M

New Status: Choose a Status

Comments:

Cancel Change

Terminé Internet

- ➔ 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.

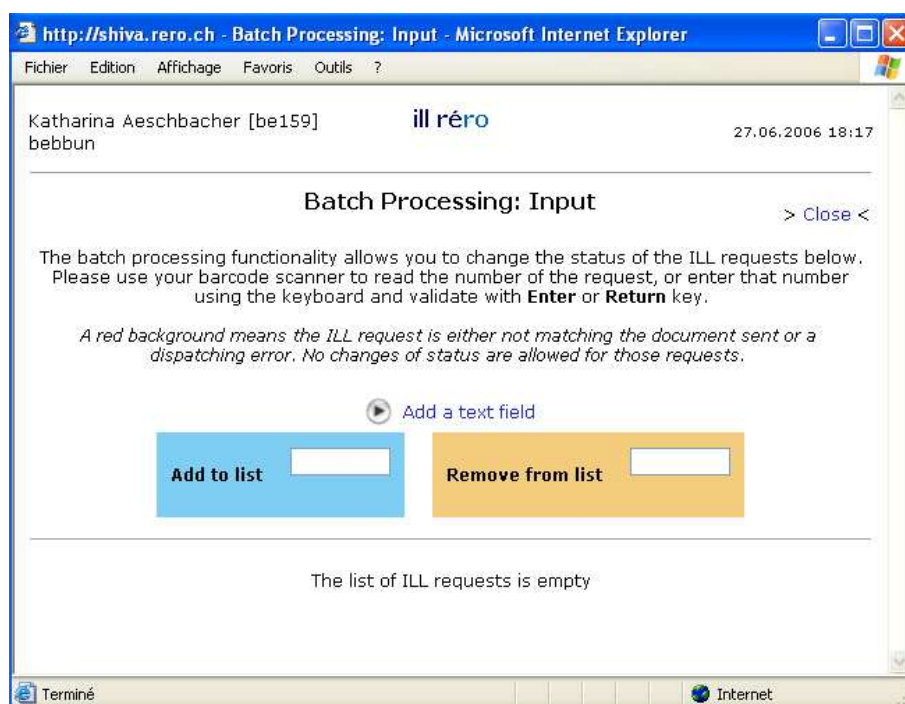
This does not apply to the **"Change Status"** command, which verifies the current status before the change to the new status; if there is no authorization, the status of the request does not change and no error message is shown.

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:

http://shiva.rero.ch - Batch Processing: Input - Microsoft Internet Explorer

Fichier Edition Affichage Favoris Outils ?

Ewa Lanz [bes] bestub ill rero 27.06.2006 18:48

Batch Processing: Input

> Close <

The batch processing functionality allows you to change the status of the ILL requests below. Please use your barcode scanner to read the number of the request, or enter that number using the keyboard and validate with **Enter** or **Return** key.

A red background means the ILL request is either not matching the document sent or a dispatching error. No changes of status are allowed for those requests.

▶ Add a text field

Add to list **Remove from list**

4 requests in the list

#	Type	Status	Due Date
00172434	M	Document Sent	09.02.06
00171859	M	Document Sent	09.02.06
00170159	M	Document Sent	10.02.06
00175217	M	Document Sent	

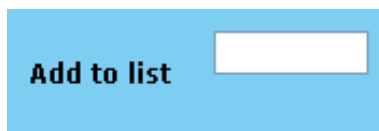
Checkout Date (Format: 01.12.2004) **Call Number**

Due Date (Format: 01.12.2004) **2nd Call Number**

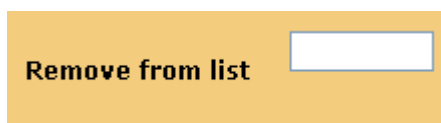
Cost For Patron **Cost For Requester Lib.**

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.

A blue rectangular button with the text "Add to list" in black. To the right of the text is a small white rectangular input field.

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.

An orange rectangular button with the text "Remove from list" in black. To the right of the text is a small white rectangular input field.

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



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.

4 requests in the list Remove All

#	Type	Status	Due Date
00172434	M	Document Sent	09.02.06
00171859	M	Document Sent	09.02.06
00170159	M	Document Sent	10.02.06
00175217	M	Document Sent	

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

Checkout Date	<input type="text" value="12.01.06"/> (Format: 01.12.2004)	Call Number	<input type="text" value="UPC 160"/>
Due Date	<input type="text" value="09.02.06"/> (Format: 01.12.2004)	2nd Call Number	<input type="text" value="7.071MIE8"/>
Cost For Patron	<input type="text" value="3.00"/>	Cost For Requester Lib.	<input type="text" value="8.00"/>

The 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 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

http://shiva.rero.ch - Batch Processing: New Status - Microsoft Internet Explorer

Fichier Edition Affichage Favoris Outils ?

Ewa Lanz [bes] bestub ill rero 03.07.2006 14:15

Batch Processing: New Status

Choose a new status:

☒ Document Received

☐ Patron Notified: Doc. To Be Picked Up

☐ Document Returned

☐ Print request orders

There are 4 requests to be changed.

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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:



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).

Bon de commande 0116560 M



To be attached with the document!
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Modifié 08.11.2005 15:49

ISO 10160/10161

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Commentaires

Monographie

Auteur Proust, Marcel
Titre Par les yeux de Marcel Proust / choix et montage des textes: Anka Muhlstein
Lieu / Date Paris : Denoël, 1971

Localisation

Localisation BCUD magasins .
Dépôt BCUD magasins .
Code à barres 1092001402
Cote FA 9151

Bordereau

Prêté le	
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Cote fournie	
Remarques	

ANNEX 4: Statuses of a request from creation to archiving.

Below is the "standard" chronology of request statuses:

Requester [ep3]	Responder [ab1]
New	
Approved	
Dispatched	New
Dispatched... (1)	New
Request rejected (2)	
In process or In process (R)	Document ordered or Document reserved
Document sent [ab1]	Document sent
Document received [ab1]	Document received by [ep3]
Patron notified [ab1]	Document received by [ep3]
Document returned [ab1]	Document returned by [ep3]
Returned document received [ab1]	Returned document received [ep3]
Request terminated (3)	
Request archived (4)	

- (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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