Support:

Australia: 1300 260 795 (Local call cost in Australia)
Email: support-amlib@oclc.org
Amlib Help Desk (TOPDesk):
https://servicedesk.oclc.org/tas/public/
OCLC Amlib Document Portal:
https://www.oclc.org/support/services/amlib.en.html

Sales:

Australia: 1300 260 795 (Local call cost in Australia)
Fax: +61 (0) 3 9929 0801
Email: sales-amlib@oclc.org

www.oclc.org/en-AU/
Table of Contents

OVERVIEW ...................................................................................................................... 4

INTER LIBRARY LOAN SETUP ....................................................................................... 4
  Installation Parameter .................................................................................................. 4

Create External Libraries .............................................................................................. 5

Loan Source .................................................................................................................... 6

Form & Stats Codes ...................................................................................................... 6
  Setting New Stats Code ............................................................................................... 7
  Setting Form Code Validation ..................................................................................... 7
  Setting Loan Parameters ............................................................................................. 9

ILL Records ................................................................................................................... 13
  Stockitem Default ....................................................................................................... 13
  Creating ILL Records ................................................................................................. 15
  Creating ILL Records from an Existing Catalogue Entry ............................................ 15
  Printing ILL Reports .................................................................................................. 19

RECEIPT OF AN INTER LIBRARY LOAN ITEM ............................................................. 21
  Editing & Updating Received ILL Items .................................................................... 22

PROCESSING ILL ITEMS ............................................................................................. 23
  Reservation Notices ................................................................................................... 23
    Reservation Report Templates .................................................................................. 23
    Load the Template .................................................................................................... 23
    Reservation Statuses ............................................................................................... 25
  Setting Up the Report: Pick-Up List .......................................................................... 25
  Where Statement ........................................................................................................ 27
  Order .......................................................................................................................... 28
  Print ............................................................................................................................. 28
  Issue ILL Items .......................................................................................................... 29
  Return of ILL Items .................................................................................................... 29
  Delete ILL Stockitem Records .................................................................................... 30

ISSUING ITEMS TO EXTERNAL LIBRARIES ............................................................. 31
  Setting Up Borrower Types ....................................................................................... 31

REPORTS ....................................................................................................................... 32
  Sample ILL Reports ................................................................................................... 33

STATISTICS .................................................................................................................. 36
  Sample ILL Statistics Reports .................................................................................... 37
OVERVIEW

It is possible to setup Inter Library Loans within Amlib to process requests from borrowers and also issuing items to external libraries. Using the system sites can keep track and manage Inter Library Loans more efficiently.

INTER LIBRARY LOAN SETUP

Installation Parameter

Sites that are setting up Inter Library Loan for the very first time should check the Installation Parameter set in Main > Supervisor > Installation – Circulation tab.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Give a Message when an InterLibrary Loan is Returned</td>
<td>A on-screen message to be displayed if a stockitem marked as an ILL is returned. Insert Y (YES) or N (NO)</td>
</tr>
<tr>
<td>If set to Y allows renewals to be due after the ILL Return date</td>
<td>ILL stockitems can be renewed and the due date can be set to after the original ILL Return Date. Insert Y (YES) or N (NO)</td>
</tr>
<tr>
<td>If set to Y allows an issue return date &gt; than the specified ILL Return date</td>
<td>Issue Return Date of the ILL stockitem can be greater than the set ILL Return Date. Insert Y (YES) or N (NO)</td>
</tr>
</tbody>
</table>

Note: Set these settings in the Default Location parameter, if parameter set does not apply to other locations in the Installation screen select Installation > Choose Location, select the other location and insert the applicable parameter setting for this location.
Each time a change in the Installation screen is made press **F3Save** and restart Amlib for the changes to become effective.

### Create External Libraries

External libraries need to be created prior to creating the first ILL record. This is created in the StockExternalLibs table.

This table is referenced when creating Inter Library Loan and supplying information.

1. Launch the Amlib Client
2. Go to **Main > Stockitem > Stockitem**
3. From the Stockitem menu select, **Application > StockExternalLib** – the **External Libraries** screen will display:

   ![External Libraries Screen](image)

4. Click the **F1New** button
5. Enter the External Libraries detail

   **Note:** If you are intending to send request email via E-Mail the 'Request Method' column must have an 'E' for Email entered or enter email address details in this column, if 'Request Method' is left empty it is assumed that sending requests is either in letter format or fax format.

6. Click the **F3Save** button to save the newly entered External Library
Loan Source

If you wish to define Source for items this can be set in the Stockitem – Origination/ Owner of item screen.

1. Launch the Amlib Client
2. Go to Main > Stockitem > Stockitem
3. From the Stockitem menu select, Application > StockitemOrigins – the Origination/ Owner of Item screen will display:

4. Click F1New button
5. Enter detail for the source:

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin/Source of Item</td>
<td>Code of up to 3 characters in length to identify the origin of the item</td>
</tr>
<tr>
<td>Description</td>
<td>Description of up to 50 characters in length to describe the origin of the item</td>
</tr>
<tr>
<td>Allow Depreciation</td>
<td>Enter Y/N to allow depreciation on this group of items</td>
</tr>
<tr>
<td>Keep Depreciation History</td>
<td>Enter Y/N to keep a depreciation history on this group of items</td>
</tr>
<tr>
<td>Round up</td>
<td>Enter Y/N so that during depreciation, round up to the nearest dollar as shown in the last column</td>
</tr>
<tr>
<td>Round down</td>
<td>Enter Y/N so that during depreciation, round down to the nearest dollar as shown in the last column</td>
</tr>
<tr>
<td>To Nearest “n” dollar</td>
<td>Enter the amount that the rounding up or down will be calculated.</td>
</tr>
</tbody>
</table>

6. Click the F3Save button – the new code will now be displayed in the Source list

Form & Stats Codes

Specific Form and/or Stats codes can be setup specifically for Inter Library Loans. Different codes can allow different validation and loan parameter. Both form and/or stats code can then be used for reporting purposes.
To create a new Form code or Stats code, this can be done by going to **Main > Stockitem > StockitemStatsCode** (or **StockitemForm**).

**Setting New Stats Code**

1. Go to **Main > Stockitem > StockitemStatsCode** – the Stats Codes screen will display
2. Click the **F1New** button
3. Enter detail for the new Stats Code:

<table>
<thead>
<tr>
<th>Column Heading</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stats Code</td>
<td>Stats code, up to 6 characters in length</td>
</tr>
<tr>
<td>Allow Loan</td>
<td>Y or N. Although forms may be specified as Not Allowed for Loan, this may be overridden at the point of issue</td>
</tr>
<tr>
<td>Floating</td>
<td>Floating collections enable items to be borrowed at one Location and returned at another, changing the Permanent and Temporary Locations on the Stockitem to the Return Location. No prompts display</td>
</tr>
<tr>
<td>Stats/ Collection Description</td>
<td>Description, up to 50 characters in length</td>
</tr>
<tr>
<td>Price Group code</td>
<td>Used to assign items with this stats code to a particular group for pricing and depreciation purposes.</td>
</tr>
<tr>
<td>Cat Def Defined</td>
<td>Y or N. This is automatically updated by defining Catalogue Definitions using the [F8] option. This allows definition of relationships between Stats types and MARC parameters to assist in the automatic allocation of Stats codes to items created from MARC downloads</td>
</tr>
</tbody>
</table>

4. Click the **F3Save** button – the new code will now be displayed in the Stats Codes list:

![Stats Codes - STAFF at Chelsea Library](image_url)

**Setting Form Code Validation**

The Form Type Validation table represents the fields that are needed before a newly created stockitem is allowed to be Saved.

1. Go to **Main > Stockitem > StockitemForm**
2. Highlight the applicable Form Code and click the **F8Validtn** button – the **Form Type Validation** screen will display
3. Enter the validation for the Form Type either Y or N to indicates whether or not a field must be included, Lines 1 – 6 relate to the Stockitem Display but usually defaulted to:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line 1</td>
<td>Usually the Title</td>
</tr>
<tr>
<td>Line 2</td>
<td>Usually the Author</td>
</tr>
<tr>
<td>Line 3</td>
<td>Often Subject (only 1 Subject Heading is displayed on this screen) or Publisher</td>
</tr>
<tr>
<td>Line 4</td>
<td>Usually the Series or ISBN</td>
</tr>
<tr>
<td>Line 5</td>
<td>Often Publisher or Subject</td>
</tr>
<tr>
<td>Line 6</td>
<td>Usually the Call Number</td>
</tr>
</tbody>
</table>

4. Press the **F3Save** button to save the validation entered
Setting Loan Parameters

It is possible to have your system control loan periods by the Item Stats code/or Form code. This is set by a parameter in Main > Supervisor> Installation, click the Circulation tab.

![Image of loan parameter setup]

Note: Depending on how the system control loan periods, the loan parameter will be set in either in Main > Stockitem> StockitemForm, or Main > Stockitem> StockitemStatsCode

In the above example the loan period is controlled by the Stockitem Form Code. To setup the Loan parameter:

1. Go to Main > Stockitem> StockitemForm
2. Highlight the applicable Form Code and click the F7Loan button – the Form Code screen will display

![Image of Loan Parameters and Borrower Types]

3. Enter the Loan Parameter for each borrower type – see the tables below for explanations for each tab and its content purpose
4. Once new parameter have been entered press the F3Save button

Daily Loans Tab

The fields in this window include:

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>EXPLANATION</th>
<th>ENTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Code
Displays the Form/Stats code for each corresponding Stockitem Form or Stats code

### Description
Displays the Form or Stats description for each corresponding Stockitem Form or Stats code

### Type of Loan (D,H)
Displays whether the Loan is a Daily, Hourly, Overnight, Semester, Term or Yearly type Loan

### Can Loan?
Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?

### Loan Qty
The number of Items of this Form that may be on loan to this borrower type at any one time. For example, a Borrower Type may be allowed 8 items but only 1 item with a Form of Video.

### Loan Days
The usual loan period in days (which can be overridden at the time of Issue).

### Grace Period
Period by days before which a charge will be made for late items. Whether the charge itself is calculated from the actual due date or the due date plus the grace period is determined in the Supervisor, Installation menu.

### Can Renew?
Determines whether borrowers can renew items of this type.

### Renew Times
Controls the number of times a renewal of a loan for items of this Form for or by a borrower.

### Can Reserve?
Determines whether borrowers can make or request reservations for this type of item.

### Reserve Qty
Controls the number of reservations allowed for items of this Form for or by a borrower

---

**Hourly Loans Tab**

The fields in this window include:

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>EXPLANATION</th>
<th>ENTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Displays the Form/Stats code for each corresponding Stockitem Form or Stats code</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Displays the Form or Stats description for each corresponding Stockitem Form or Stats code</td>
<td></td>
</tr>
<tr>
<td>Type of Loan (D,H)</td>
<td>Displays whether the Loan is a Daily or Hourly type Loan</td>
<td>D/H</td>
</tr>
<tr>
<td>Can Loan?</td>
<td>Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?</td>
<td>Y/N</td>
</tr>
<tr>
<td>Loan Qty</td>
<td>The number of Items of this Form that may be on loan to this borrower type at any one time. For example, a Borrower Type may be allowed 8 items but only 1 item with a Form of Video.</td>
<td>nn</td>
</tr>
<tr>
<td>Loan Days</td>
<td>The usual loan period in hours (which can be overridden at the time of Issue).</td>
<td>nn</td>
</tr>
<tr>
<td>Grace Period Hours</td>
<td>Period of hours before which a charge will be made for late items. Whether the charge itself is calculated from the actual due date or the due date plus the grace period is determined in the Supervisor, Installation menu.</td>
<td>nn</td>
</tr>
<tr>
<td>Can Renew?</td>
<td>Determines whether borrowers can renew items of this type.</td>
<td>Y/N</td>
</tr>
</tbody>
</table>
Renew Times | Controls the number of times a renewal of a loan for items of this Form for or by a borrower. | nn
---|---|---
Can Reserve? | Determines whether borrowers can make or request reservations for this type of item. | Y/N
Reserve Qty | Controls the number of reservations allowed for items of this Form for or by a borrower | nn

Charges Tab

The fields in this window include:

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>EXPLANATION</th>
<th>ENTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Displays the Form/Stats code for each corresponding Stockitem Form or Stats code</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Displays the Form or Stats description for each corresponding Stockitem Form or Stats code</td>
<td></td>
</tr>
<tr>
<td>Type of Loan (D,H)</td>
<td>Displays whether the Loan is a Daily or Hourly type Loan</td>
<td>D/H</td>
</tr>
<tr>
<td>Can Loan?</td>
<td>Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?</td>
<td>Y/N</td>
</tr>
<tr>
<td>Loan Charges</td>
<td>A charge which is applied when an item is loaned.</td>
<td>$ Value</td>
</tr>
<tr>
<td>Can Renew?</td>
<td>Determines whether borrowers can renew items of this type.</td>
<td>Y/N</td>
</tr>
<tr>
<td>Renew Charge</td>
<td>A charge which is applied when an item is renewed.</td>
<td>$ Value</td>
</tr>
<tr>
<td>Can Reserve?</td>
<td>Determines whether borrowers can make or request reservations for this type of item.</td>
<td>Y/N</td>
</tr>
<tr>
<td>Res Charge</td>
<td>A charge which is applied when an item is reserved.</td>
<td>$ Value</td>
</tr>
</tbody>
</table>

Fines Tab

The fields in this window include:

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>EXPLANATION</th>
<th>ENTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Displays the Form/Stats code for each corresponding Stockitem Form or Stats code</td>
<td>Code is displayed</td>
</tr>
<tr>
<td>Description</td>
<td>Displays the Form or Stats description for each corresponding Stockitem Form or Stats code</td>
<td>Description is displayed</td>
</tr>
<tr>
<td>Type of Loan (D,H)</td>
<td>Displays whether the Loan is a Daily or Hourly type Loan</td>
<td>D/H</td>
</tr>
<tr>
<td>Can Loan?</td>
<td>Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?</td>
<td>Y/N</td>
</tr>
<tr>
<td>Late per hour</td>
<td>A charge per hour which is applied when an item is returned late</td>
<td>$ Value</td>
</tr>
<tr>
<td>Late per day</td>
<td>A charge per day which is applied when an item is returned late.</td>
<td>$ Value</td>
</tr>
<tr>
<td>Late per week</td>
<td>A charge per week which is applied when an item is returned late.</td>
<td>$ Value</td>
</tr>
<tr>
<td>Max Overdue Charge</td>
<td>The maximum charge that will be raised for a fine for any one particular late return. If set to $0.00 Amlib will calculate the overdue charge to the value of the Stockitem</td>
<td>$ Value</td>
</tr>
</tbody>
</table>
ILL Records

Stockitem Default

These are the Defaults entries that will be inserted into the Stockitem when an ILL record is created. These Defaults entries can be altered at any time and saved by pressing the F6UpdDef button.

<table>
<thead>
<tr>
<th>Field</th>
<th>Default</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form</td>
<td>The Form code that will be entered into Stockitem for ILLs. Ensure this code is defined in Stockitem module in Application &gt; StockitemForm</td>
<td>ILL</td>
</tr>
<tr>
<td>Stats</td>
<td>The Stats code that will be entered into Stockitem for ILLs. Ensure this code is defined in Stockitem module in Application &gt; StockitemStats</td>
<td>AF</td>
</tr>
<tr>
<td>Source</td>
<td>The Source code that will be entered into Stockitem for ILLs. Ensure this code is defined in Stockitem module in Application &gt; StockitemOrgin</td>
<td>DDO</td>
</tr>
<tr>
<td>Loan Type</td>
<td>The Loan Type code that will be entered into Stockitem for ILLs. The Loan Type will override normal Loan periods set for the Form. Ensure this code is defined in Stockitem module in Application &gt; StockLoan Type</td>
<td>ILL Loan Type loan for 6 weeks</td>
</tr>
<tr>
<td>Opac?</td>
<td>Show in Opac? Y/N</td>
<td>N</td>
</tr>
<tr>
<td>Alert?</td>
<td>Alert Operator? Y/N Usually links to the Process. If the ILL fields are filled in at the bottom of the Stockitem screen (ILL Library, ILL Renew, ILL Due) an alert will be displayed on the screen. If the Alert? Field is set to Y, two alerts will be shown</td>
<td>N</td>
</tr>
<tr>
<td>Perm Locz</td>
<td>If ticked the Supplying Library will display in the Permanent</td>
<td></td>
</tr>
<tr>
<td>Location Field on the Stockitem</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Temp Locn</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If ticked the Supplying Library will display in the Temporary Location Field on the Stockitem</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location Field on the Stockitem</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patron Reqd</strong></td>
</tr>
<tr>
<td>If set to Y, the Borrower field must be entered before the ILL is Inserted. If set to N, the Borrower field is optional. A reserve is automatically placed for a Borrower if entered in the Borrower Field</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location Field on the Stockitem</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Y</strong></td>
</tr>
</tbody>
</table>
Creating ILL Records

1. Launch the Amlib Client
2. Go to Main > Stockitem> Stockitem
3. From the Stockitem menu select, Item > ILLS – the InterLibrary Loans screen will display
4. Enter the details of the Inter Library Loan:

Note:
- When entering the Supplying Libraries as entered in the StockExternalLibs screen. Enter a Full Stop into the field and press the <TAB> key on your keyboard. A list of Supplying Libraries will be displayed.
- When entering a Borrower who requested the item and the borrower barcode is not known at the time click the Borrower button, the Borrower Enquiry screen.
- The Form & Stats code must be filled in. By default

5. Once all the required detail for the ILL has been entered press the F2Insert button, a message will display informing the ILL record has been created

Creating ILL Records from an Existing Catalogue Entry

ILL records can be created from catalogue entries that already exist by cross referencing from the catalogue module. This will also automatically fill in certain fields in the ILL screen.
1. Launch the Amlib Client

2. Go to Main > Catalogue > Catalogue – the Catalog screen will display:

3. Type all or some of the Catalogue entry – for example: part of a title

4. Click the F5Query button

5. If a Query option has not been previously been chosen, the Query Options listing will display

6. Double-click on the desired Query option (or highlight the line and select the <Enter> button)

7. When more than one record is found, the search result are shown in a Catalogue List

8. Double-click the line with the correct catalogue wishing to view, or highlight the line and select the <Enter> button. The selected Catalogue record is displayed:
9. From the Catalogue menu select, XReference > CreateILL – the InterLibrary Loans screen will display with some of the data fields filled in:

10. Once all the required detail for the ILL has been entered press the F2Insert button,

11. A message will display informing the ILL record has been created, click the OK button

**Note:** If a borrower has requested an ILL and it has been entered in the Inter Library Loans window, upon pressing the F2Insert button a reservation is automatically placed against the requesting borrower.

12. A stockitem has now been generated, and the stock item number and creation date for this ILL is shown:
13. Press the **F5** *Refresh* button to change the status of the ILL to ‘NEW’. This status is relevant for reporting purposes.

14. Click the [x] button to exit out of the Inter Library Loan window. The stock item will then display. The item may be further modified and/or reserved using normal processing.
Printing ILL Reports

Once an ILL record is created and you wish to print a request form to be sent to the Supplying libraries this can be done directly from the Inter Library Loan window using the F7Prt1, F8Prt2 or F9Prt3 buttons.

**Note:** Alternatively, many libraries send the ILL requests in bulk, this can be done from the Reporting module in, Main> Reports> RepILLS

Once the requests has been previewed and printed, the ILL Status will change from NEW to PRINTED.

- **F7 Prt1** A print format to send requests to Supplying libraries (e.g. if the Library does not use the Online Process). This report uses Template $illone.qrp
- **F8 Prt2** A print format to send requests to Supplying libraries (e.g. if the Library does not use the Online Process). The Report Template is `$illtwo.qrp`.

![Faxed Interlibrary Loan Form](image1.png)

- **F9 Prt3** A print format (with 4 copies of the ILL slip) to send requests to Supplying libraries (e.g. if the Library does not use the Online Process). The Report Template is `$illthre.qrp`.

![Faxed Interlibrary Loan Form](image2.png)
RECEIPT OF AN INTER LIBRARY LOAN ITEM

When an ILL is received from the supplying library the ILL stockitem record can be updated with the required details.

ILL records may be found using the Stockitem, or using a StockitemWhere search in Main>Stockitem>StockitemWhere.

Once the item has been located, the temporary stockitem number can be changed to match the barcode on the actual item. And other details can be entered such as:

- ILL Library
- ILL Renewal
- ILL Due
Editing & Updating Received ILL Items

In this example the received ILL will is located using a StockitemWhere search.

1. Launch the Amlib Client
2. Go to Main > Stockitem > StockitemWhere – the Stockitem Where Search will display
3. The statement must include:
   a. Item No LIKE ILL (this will include all stockitem number that begin with ILL)
4. Press the F5Query button, if prompted to use a Saved file click NO - the Stockitem List window will display
5. Highlight & double-click the received ILL stockitem – the Stockitem screen will display
6. Edit & Update the following information as required:
   - Item No – Is changed to the real barcode when the item is received
   - ILL Library – Library that supplied the stockitem. Place a full stop [.] into the field and press the <TAB> key on keyboard to bring a list of External Libraries
   - ILL Renewal – Is a renewal allowed? Enter either (Y)es or (N)o
   - ILL Due – Due date for the stockitem. Click the field and press the <TAB> key on keyboard this will make the date due in 1 month
7. Once all the details have been updated, press the F3Update button.
   If a reservation was placed against this item, a message will be displayed of the borrower:

A memo will also be automatically placed against the Borrower records:
PROCESSING ILL ITEMS

Reservation Notices

Reservation notices can be sent out to notify patrons that ILL items are awaiting collection.

Reservation Report Templates

- &RESLIST.QRP – Reservation List (Full Details)
- &RESBRF.QRP – Reservation List (Brief Details)
- &RESBRFC.QRP – Reservation List by Class (Brief Details)
- &RESBRFG.QRP – Reservation List by Group (Brief Details)
- &RESEMAIL.QRP – Reservation Notice (Letter)*
- &RESEML.QRP – Reservation Notice (Email)*
- &RESSMS.QRP – Reservation Notice (SMS)*
- &RAX4010.QRP – Reservation book slips

Load the Template

1. Launch the Amlib client
2. Go to Main > Reports > RepAddNew – the Report Files screen will display
3. From the Report Entity drop-down, select Reservation
4. Click the F1 New button – the Reservation Reports – New Report File screen will display
5. Type in a Description – for example: Reservation Notice (Letter)
6. Browse to the Amlib/Reports folder on your Amlib Server and locate the template to be loaded (if the template has been loaded onto your PC – then navigate to the local folder)
7. If loading an unmodified template, change the Files of type drop-down to: System Report Templates (&.qrp)
8. Highlight the template to be loaded and click on the Open button
9. Choose Type – there are several types to select depending on the template being loaded (the type is important as it determines the type of data that is sent to each particular notice):
   - Reservations (Default)
     - Use for: &RESBRF.QRP, &RESBRFC.QRP, &RESBRFG.QRP, &RESEMAIL.QRP and &RAX4010.QRP
   - Email
     - Use for: &RESEML.QRP
   - Unlimited Reservation Format
     - Use for: &RESLIST.QRP and &RESSMS.QRP
10. You can leave Default Stats Code and Default Details Stats Code blank
11. Update History (Y/N) = Y
12. Update Entity (Y/N) = Y
13. Click on the F3 Update button

14. Close out of the Report Files window

The template is now loaded and available for use in a Report.
Reservation Statuses

When an item is placed on reserve, a Reservation Status is placed against that item. The status is important as the reports use this status as a determinant for what to print and what not to.

<table>
<thead>
<tr>
<th>STATUS</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISSUE</td>
<td>Item was on loan when reserved (reserve placed via Amlib client)</td>
</tr>
<tr>
<td>ON LOAN</td>
<td>Item was on loan when reserved (reserve placed via Opacs)</td>
</tr>
<tr>
<td>SHELF</td>
<td>Item was on shelf (available) when reserved</td>
</tr>
<tr>
<td>RETURN</td>
<td>Item has been returned AFTER reservation placed</td>
</tr>
<tr>
<td>TRANSFER</td>
<td>Item was on transfer when reserved</td>
</tr>
<tr>
<td>ORDER</td>
<td>Item was on order when reserved</td>
</tr>
<tr>
<td>READY</td>
<td>Reservation on item has been CANCELLED through an expiry report and is now ready for the next reader</td>
</tr>
<tr>
<td>PRINTED</td>
<td>Item was included in a scheduled Reservation report with Update Res Status = Y</td>
</tr>
</tbody>
</table>

Setting Up the Report: Pick-Up List

If you allow reservations to be placed on items that are ON SHELF (available) at the time of the reservation, then you will need to create and run a report that will create a pick-up list to collect these items.

Create Report

1. Launch the Amlib client
2. Go to Main > Reports > RepReservation - the Reservation Reports screen will display
3. Click the F1 New button – the Select Report Format screen will display
4. Highlight Reservation Pick List (wording may differ – it will be using the &RESLIST.QRP print template) and click the Select button
5. Type in a Report Description – for example: Reservations Pick List

6. Create Hist (Y/N) = N

7. Update Res Status = N

8. Click the F3 Save button
Where Statement

1. Select the report from the list and click the **F7 Where** button – the Reservation Reports – Where screen will display

2. The statement **must** include the following settings:
   
   - **Only Show First in Queue (Y/N) = Y** (otherwise ALL reserves on an item will show)
   - **Res Item Status IN SHELF,READY** (this will pick up any available or recently expired reservation items)
   - **On Loan (Y/N) = N**
   - (Optional) **Item Perm Loc =** (enter your location code) – for example: Item Perm Loc = CHELSEA (where multiple locations available)
   - (Optional) **Process IS NULL** (paste without putting a value in – this will exclude any items in Processing, Binding, Missing, etc)
   - (Optional) **Is on Order (Y/N) = N** (this will exclude any items on order)

3. Click the **F3 Save** button when complete
Order

1. Highlight the report from the list and click on the **F9 Order** button – the Reservation Reports – Order By screen will display:

![Reservation Reports - Order By](image)

2. Use the arrow keys to select fields to Order By – for example: **Item Call Number**

3. Click the **F3 Save** button

Print

1. Highlight the report from the list and click the **F8 View** button – the Select File for View prompt will display with the following message: **This type of report may use a Saved File as the Source. Do you want to select the file now?**

![Select File for View](image)

2. Click the **No** button

3. The Report – View screen will display with a list of the items

4. Click the print button to print the list

**Please Note:** No notices will be generated to patrons nor will the Reservation Status of the item be altered.
Issue ILL Items

ILL items are issued to Borrowers using usual circulation methods. The due dates of ILL items are determined from the items form type, or the date set in the stockitem ‘ILL Due’ field or whichever is the earliest date.

Return of ILL Items

ILL items are returned as usual via the returns module. On return of an ILL item a prompt will be shown indicating the Supplying Library and the Due Date of date of the item.
Delete ILL Stockitem Records

Once ILL items have been returned to the supplying library the temporary stockitem record can be deleted from the Stockitem module.

1. Launch the Amlib Client
2. Go to Main &gt; Stockitem &gt; Stockitem - the Stockitem screen will display
3. Enter the stockitem number into the ‘Item No’ field and press the F5Query button

4. To delete the ILL stockitem record press the F4Delete button
5. A prompt will display to confirm deletion of stockitem, press the YES button. The corresponding ILL record is now deleted
ISSUING ITEMS TO EXTERNAL LIBRARIES

Generally to issue items to external libraries a new borrower record is created within Amlib. A borrower type of Inter Library Loan will also need to be created so that Loan parameters can be set.

Alternatively one general borrower of Inter Library Loan could be created with the individual library loan information retained elsewhere or by adding a memo to the stockitem when loaned. In the below example a Inter Library Loan Borrower Type & Loan parameter will be setup.

Setting Up Borrower Types

1. Launch the Amlib Client
2. Go to Main > Borrower > BorrowerType - the Borrower Types screen will display
3. Click the F1New button to insert a new borrower type, and enter the appropriate details:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type Code</td>
<td>Code for Borrower Type</td>
<td>I</td>
</tr>
<tr>
<td>Description</td>
<td>Description of Borrower Type</td>
<td>Interlibrary Loan</td>
</tr>
<tr>
<td>Keep Bor History</td>
<td>History of past reading records is kept for borrowers until deleted, if a Y is entered in this column. They system will notify the operator if an item has been borrowed previously and how many days ago. If the Borrower history is not kept, the system still keeps Stockitem history so the items that a person has borrowed can still be checked.</td>
<td>Y</td>
</tr>
<tr>
<td>Include in Stats</td>
<td>Statistics can be recorded to the hour, day, month or year depending upon the settings in Supervisor, StatsParams for the Borrower Types that have a Y set in this column.</td>
<td>Y</td>
</tr>
<tr>
<td>Max Item on Loan</td>
<td>Sets the total number of items on loan. Specific privileges based on form or stats codes of the items are set by selecting Loans [F7].</td>
<td>100</td>
</tr>
<tr>
<td>Return By Date</td>
<td>Sets the return by date of items on loan.</td>
<td>31/12/2012</td>
</tr>
<tr>
<td>Age &gt;=</td>
<td>When a new borrower is created the system will assign the appropriate borrower type parameter depending on age if an entry is added within these fields. This is useful for creating Junior members in Public Libraries.</td>
<td>18</td>
</tr>
<tr>
<td>Age &lt;=</td>
<td>When a new borrower is created the system will assign the appropriate borrower type parameter depending on age if an entry is added within these fields. This is useful for creating Junior members in Public Libraries.</td>
<td>100</td>
</tr>
<tr>
<td>Exp Days</td>
<td>The number of days for expiry for this Borrower Type. Once a borrower has expired they would need to Reregister before allowing activity on the system. The Supervisor, Installation, Borrower parameters would need to be set to M or D for the above to be effective.</td>
<td>999</td>
</tr>
</tbody>
</table>

4. Press the F3Save button to save entered details
5. Highlight the newly created borrower type and press the F7Loan button – the Loan Parameters and Borrower Type screen will display
6. Adjust the Loan Parameter as needed for this borrower type. See Setting Loan Parameters section for further instructions on how to set this up
7. Press the F3Save button to save entered details
REPORTS

Inter Library Loans reports are accessed from the report module.

1. Launch the Amlib client

2. Go to Main > Reports > RepILLS – the Inter Library Loans Reports screen will display:

Below is a table containing a list of the available report that can be setup in RepILLS:

<table>
<thead>
<tr>
<th>TEMPLATE</th>
<th>DESCRIPTION</th>
<th>REPORT TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>&amp;ILLLET.QRP</td>
<td>Interlibrary Loan letter</td>
<td>Default</td>
</tr>
<tr>
<td>&amp;ILLRNEW.QRP</td>
<td>List of ILL items that have been renewed</td>
<td>Default</td>
</tr>
<tr>
<td>&amp;ILLEREM.QRP</td>
<td>ILL reminder notice (email) to first supplying library only</td>
<td>E-Mail Request</td>
</tr>
<tr>
<td>&amp;ILLEREQ.QRP</td>
<td>ILL request (email) to first supplying library only</td>
<td>E-Mail Request</td>
</tr>
<tr>
<td>&amp;ILLERMS.QRP</td>
<td>ILL reminder notice (email) to all supplying libraries</td>
<td>E-Mail Request to all suppliers</td>
</tr>
<tr>
<td>&amp;ILLERQS.QRP</td>
<td>ILL request via Email to all supplying libraries</td>
<td>E-Mail Request to all suppliers</td>
</tr>
<tr>
<td>&amp;ILLREM.QRP</td>
<td>ILL Reminder to supplying library</td>
<td>Default</td>
</tr>
<tr>
<td>&amp;ILLRNW.QRP</td>
<td>ILL renewal request to supplying library</td>
<td>Default</td>
</tr>
<tr>
<td>&amp;ILLST.QRP</td>
<td>ILL listing of ILL stockitems</td>
<td>Default</td>
</tr>
<tr>
<td>&amp;LFAX.QRP</td>
<td>Interlibrary Loan fax</td>
<td>Default</td>
</tr>
<tr>
<td>&amp;LFAXA.QRP</td>
<td>Interlibrary Loan fax – varying format</td>
<td>Default</td>
</tr>
<tr>
<td>&amp;LSILLS.QRP</td>
<td>List of ILL items</td>
<td>Default</td>
</tr>
</tbody>
</table>
Sample ILL Reports

Inter Library Loans not Received

1. Click on the **F1New** button and highlight a Template – for example: ILL listing of ILL stockitems (&ILLST.QRP)

2. Click the **Select** button – the new Report will appear in the table

3. Type in a **Report Description** and click the **F3Save** button

4. Highlight this report and click on the **F7Where** button – the **Inter-Library Loan Reports – Where** screen will display

5. Enter the following Where statement

   a. **ItemNo LIKE ILL**

6. Click the **F3Save** button when complete

7. Click the **F8View** button to see a list on the screen (which can be printed using the **print** icon) or **F6 Print** to print/email the report via the **Scheduler**

---

<table>
<thead>
<tr>
<th>Library</th>
<th>Title</th>
<th>Author</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEL</td>
<td>Garden of RAMA</td>
<td>Clarke, Arthur</td>
<td>5/02/1998</td>
</tr>
<tr>
<td>NU/VL</td>
<td>The politics of V.F.L. football</td>
<td>Wicliman, Gary</td>
<td>9/01/2003</td>
</tr>
<tr>
<td>NEDY</td>
<td>City of Botany Bay Library Service</td>
<td></td>
<td>9/03/1999</td>
</tr>
<tr>
<td>ANU</td>
<td>Western Wakening</td>
<td>Williams, A.E.</td>
<td>21/04/1999</td>
</tr>
<tr>
<td>ANU</td>
<td>Studies in industrial chemistry</td>
<td>Harris, Bill</td>
<td>21/04/1999</td>
</tr>
<tr>
<td>ANU</td>
<td>Eco-eating: a guide to balanced eating</td>
<td>Brook, Sally</td>
<td>11/10/2012</td>
</tr>
<tr>
<td>NTM</td>
<td>Legendary animals.</td>
<td>Kcmez, Valencie</td>
<td>1/05/2006</td>
</tr>
<tr>
<td>FCM</td>
<td>Whip hand.</td>
<td>Francis, Dick</td>
<td>1/05/2006</td>
</tr>
<tr>
<td>BRIM</td>
<td>Testing ILL new supplier</td>
<td>Tang, Lew</td>
<td>20/02/2012</td>
</tr>
<tr>
<td>BRIM</td>
<td>Dummy's guide to ebay</td>
<td>Lew, Peter</td>
<td>22/02/2012</td>
</tr>
</tbody>
</table>
Inter Library Loan Manual

Inter Library Loan Reminder Notice via Email (&ILLREM.QRP)

List of Inter Library Loans – Full Details (&ISILLS.QRP)
Fax Form for Sending Inter Library Loans, Bulk Form (&ILBFAX.QRP)

Variation to &ILBFAX.QRP – Single Cover Sheet Produced to Include Specific Details (&LBFAXA.QRP)

Letter Form for Inter Library Loan Requests (&ILLET.QRP)
STATISTICS

Statistics that Amlib collects are selected from the Statistics Code table in the Supervisor module. The statistics parameter type 94 & 95 are related specifically to Inter Library Loan.

1. Launch the Amlib client
2. Go to Main > Supervisor > StatsParams – the Statistics Code table will display:

![Statistics Code Table]

Note: If statistics parameter 94 & 95 for Inter Library Loans has not yet been setup – please download the Statistics Parameters guide for further instructions.
Sample ILL Statistics Reports

Outgoing Requests & Incoming Issue Count Over the Last 12 month (&STAT530.QRP)

1. Launch the Amlib client
2. Go to Main > Reports > RepStatistics— the Statistics Reports screen will display
3. Click on the F1New button and highlight and select &STAT530.QRP
4. Click the Select button – the new Report will appear in the table
5. Type in a Report Description for example: ILL Outgoing / Request in Last 12 Month and click the F3Save button
6. Highlight this report and click on the F7Where button – the Statistics Reports – Where screen will display
7. Enter the following Where statement:

   13. Click the F3Save button when complete
8. Click the F8View button to see a list on the screen (which can be printed using the print icon) or F6 Print to print/email the report via the Scheduler

Note: The report is separate into 2 sections, Outgoing Inter Library Loans and Incoming as New Item, to view sections press the forward button:
Inter Library Loans - Outgoing

Inter Library Loans - Incoming
ILL Stockitem Count via StockitemWhere Search

ILL Stockitem Count over last 12 month

1. Launch the Amlib client
2. Go to Main > Stockitem > StockitemWhere – the Stockitem Where Search screen will display
3. Enter the following Where statement:

![Stockitem Where Search Screen]

4. Click the F6Count button complete
5. When asked whether to use a saved file, press NO - a count of all ILL items will display:

![Stockitem Count Result Screen]