Interested in Ariel or ILLiad?
An overview of the two applications

Presented by
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Louisiana State University in Shreveport
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Head of Access Services
Southeastern Louisiana University
ILLiad

A Complete Interlibrary Loan System

“A Life-Saver”
Why ILLiad?

- Automates and organizes ILL processes and procedures
- Communicates directly with OCLC ILL (Resource Sharing)
- Provides patron empowerment
- Tracks requests
- Integrates with OPAC & LOUIS databases
- Automatically notifies customers
- Delivers articles to desktop
- Saves trees!
Lending Processes

- Requests automatically uploaded from OCLC ILL (Resource Sharing)
- Automated Z39.50 search of library catalog
- Print pull slips/book bands
- Respond to borrower
- Print shipping labels
- Check-In returnables when returned from borrower
Requests automatically uploaded from OCLC ILL (Resource Sharing)
Automated Z39.50 search of library
### Print pull slips/book bands

<table>
<thead>
<tr>
<th>Borrower: KEU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lending String: SUC,AAA,LWA,*LSH,MCD</td>
</tr>
<tr>
<td>Patron: Hall, Victoria</td>
</tr>
<tr>
<td>Journal Title: Mental health weekly</td>
</tr>
<tr>
<td>Volume: 15 Issue: 48 Month/Year: 2005 Pages: 5-</td>
</tr>
<tr>
<td>Article Author:</td>
</tr>
<tr>
<td>Article Title: Data reveals extensive picture of MH care in community hospitals.</td>
</tr>
<tr>
<td>Imprint: Providence, RI; Manisses Communications</td>
</tr>
<tr>
<td>ILL Number: 23455656</td>
</tr>
<tr>
<td><em>23455656</em></td>
</tr>
</tbody>
</table>

**Call #: 2nd current**

**Location:**

**ARIEL**
- Charge: $10IFM

**Shipping Address:**
ILL/Crabbe Library
Eastern Kentucky University
521 Lancaster Avenue
Richmond, KY 40475-3102

**Fax:**
- Ariel: 157.89.25.16
Respond to borrower
Check-In returnables when returned from borrower
Borrowing Processes, pt. 1

- Customer submits request through ILLiad web form, OCLC Direct Request or First Search
- New customers routed to “Clear Customers”
- Articles (copies) routed to “Copyright Clearance”
- Automatic link to OCLC search
- Select lenders
- Request sent to lenders
- Request not found routed to other queue or customer contacted
Customer submits request through ILLiad web form (or OCLC Direct Request or First Search)

### Main Menu for kjung

<table>
<thead>
<tr>
<th>Status: Choose an option from the choices below</th>
</tr>
</thead>
</table>

#### Request Types

- **Request a Photocopy**
  - Use this button to request an article from a journal, magazine, conference proceedings, or a single chapter in a book or anthology.

- **Request a Book**
  - Use this button to request a book, score or other monograph.

- **Request a Thesis**
  - Use this button to request a thesis or dissertation.

- **Request Other (Free Text)**
  - Use this button to request materials not in the above categories.

#### Review Requests

- **View/Modify Outstanding Requests**
  - Use this button to view and edit your outstanding requests, including detailed request information and statuses.

- **View/Download Electronically Received Articles**
  - Use this button to view items that you have received for web delivery.

- **View/Renew Checked Out Items**
  - Use this button to view items that you have checked out along with due dates and a method to renew your loan.

- **View Request History**
  - Use this button to view your completed requests.

- **View/Resubmit Cancelled Requests**
  - Use this button to view items that have been cancelled either by you or the InterLibrary Loan staff.
Articles (copies) routed to “Copyright Clearance”
Automatic link to OCLC search
Select lenders

<table>
<thead>
<tr>
<th>Select lenders</th>
<th>DCLC Resource Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOUISIA</td>
<td>LRU</td>
</tr>
<tr>
<td>TLS</td>
<td>SHI</td>
</tr>
<tr>
<td>IVU</td>
<td>ILU</td>
</tr>
<tr>
<td>FXG</td>
<td>TXG</td>
</tr>
<tr>
<td>ARIEL VIS</td>
<td>CSA</td>
</tr>
<tr>
<td>REGIONAL</td>
<td>KSA</td>
</tr>
<tr>
<td>IAU</td>
<td>FDA</td>
</tr>
<tr>
<td>IIA</td>
<td>INA</td>
</tr>
<tr>
<td>POQ</td>
<td>TXU</td>
</tr>
<tr>
<td>TXH</td>
<td>ARIEL</td>
</tr>
<tr>
<td>IUL</td>
<td>CDS</td>
</tr>
<tr>
<td>CLI</td>
<td>MWA</td>
</tr>
<tr>
<td>Show Local Holdings</td>
<td>Displaying 103 holdings</td>
</tr>
</tbody>
</table>
Request sent to lenders
Borrowing Processes, pt. 2

- Request received from lender by mail or electronically and checked in
- Customer is notified by email through ILLiad
- Book checked out to customer
- Item returned by customer and checked in
- Return mailing labels printed
Request received from lender by mail or electronically and checked in.
Customer is notified by email through ILLiad
Book checked out to customer, then Returned by customer and checked in.
Return mailing labels printed
Management Processes

- Customize user interface
- Customize book bands, labels, and email messages
Copyright tracking
### General Search Form

**General Request Info**
- Transaction Number
- ILL Number: 23514158
- QCLC Number

**Item Info**
- Article Title
- Article Author
- Journal Title
- Loan Title
- Loan Author

**Invoice Number**

**Call Number**

**Symbol**

**User Info**
- Username
- Last Name
- First Name
- Organization

**Search Options**
- Limit Request Type
  - All Requests
  - Active Requests
  - Closed Requests
  - Close Out Items
  - Denied Requests
  - Denied by ILL Staff
- Limit by Current Statuses
  - Awaiting Customer reply
  - Awaiting Executive Searching
  - Awaiting Odyssey Processing
  - Awaiting Request Processing
  - Delivered to Web
  - Request Finished
  - Request Sent

### No Records Currently Displayed

Drag a column header here to group by that column

<No data to display>
Borrowing Reports and statistics

Borrowing Reports

Status: Generate each report by clicking the corresponding button below.

- Fill Rate Statistics
- Requests Finished and Cancelled
- Most Requested Journals
- Turnaround Time
- Most Requested Loans
- Electronic Delivery Turnaround Time
- Registered Users by Department
- Delivery Time Distribution
- Requests Received by Day
- Requests Sent by Day
- Who We Borrow From
- Requests by Department
- Journals Received
- Requests by Department and User Status

This report shows the number of requests finished or cancelled within the given time period. The date range is based off of the date the request was finished or cancelled, not when it was submitted. Those requests cancelled are then broken down by the reason for cancellation. The finished requests include any item that has gone to Delivered to Web, Customer Notified, and Check Out to Customer or Request Finished. The cancelled requests include any item at either a status of Cancelled by Holders or Cancelled by Customer. All the dates for this report are based off of the current Transaction Date and not from any entries in the Transaction table. The report can show articles, loans, or both request types.

This report shows the average time difference for articles, loans, both request types, and any manually processed articles. The date range selected is based off of date and time the request reached the final status (Delivered to Web, Request Finished, Check Out to Customer, etc.) and not the date it was submitted (which may be before that date range selection).

This report is very similar to the Turnaround Time report except that it only shows those articles that were delivered electronically. The date range selected is based off of date and time the request reached Delivery to Web and not the date it was submitted (which may be before that date range selection).

This report shows the number of requests filled X days after being submitted by a customer for any given month and year. The report only shows transactions that are filled within 31 days of the date submitted and the date submitted is within the month and year parameter choices.

This report lists the library symbol and name of institutions who have filled more than X number of requests (where you can choose the value of X). The date range selected includes the date that the request was submitted and not necessarily the date range where the request was filled. Items are counted as filled if they have a current transaction status of Request Finished, Check Out to Customer, Delivered to Web, or Customer Notified.

This report lists journal titles and years where more than X number of that title and year have been filled (where you can choose the value of X). The date range selected notes the date that the request was submitted and not necessarily the date range where the request was filled.
<table>
<thead>
<tr>
<th><strong>Lending Reports</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status:</strong> Generate each report by clicking the corresponding button below</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Fill Rate Statistics</strong></th>
<th>This report lists all items received within the selected date range and their current status. Depending on the date range, items may still be in process until they are cancelled, conditionized or completed.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who We Lend To</strong></td>
<td>This report lists the library symbol and name of institutions who have received more than X number of requests. The date range selected notes the date that the request was submitted and not necessarily the date range where the request was filled. Items are counted as filled if they have a current transaction status of Request Finished or Item Shipped.</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Requests Received by Day</strong></td>
<td>This report shows the number of requests received each day of the given time period. Items are counted as received if they have had a status of imported from OCLC or Online, Awaiting ILL Request Processed, Awaiting Local Request Processed, Request Added Through Client or Submitted via Lending Web.</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Requests Received by System ID</strong></td>
<td>This report shows the number of requests received by each system ID in the database for the given time period. The items received are broken down by articles and loans. Items are counted as received if they have had a status of imported from OCLC or Online, Awaiting ILL Request Processed, Awaiting Local Request Processed, Request Added Through Client or Submitted via Lending Web.</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Requests Filled by Day</strong></td>
<td>This report shows the number of requests filled each day of the given time period. The date range is based off of the date that the request is either moved to Request Finished or Item Shipped. If a transaction has gone to that status more than once or both statuses, only the first instance of that transaction number is counted as the date it was filled.</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Requests Filled and Unfilled</strong></td>
<td>This report shows the number of requests finished or cancelled within the given time period. The date range is based off of the date the request was finished or cancelled, not when it was received. Those requests cancelled are then broken down by their reason for cancellation. The finished requests include any item that has gone to Request Finished or Item Shipped. The cancelled requests include any item at either a status of Cancelled by ILL Staff. All the dates for this report are based off of the current Transaction Date and not from any entries in the Tracking table. The report can show articles, loans or both request types.</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Most Loaned Journals</strong></td>
<td>This report lists the distinct journal titles (including the OCLC number or ISSN) and the number of requests that were submitted within the selected date range and are currently at a status of Request Finished. So this report only shows journals that are successfully filled.</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Turnaround Time</strong></td>
<td>This report shows the average time difference for articles, loans or both request types. The date range selected is based off of date and time the request was filled (Request Finished or Item Shipped) and not the date it was received (which may be before that date range selection).</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>IFM Charges</strong></td>
<td>This report shows a list of transaction numbers, borrowing library symbol, ILL Number, the site that filled the request and the charges for the request. The date range is based off of the date the request was added to the billing table. The only requests that show in this report are those that have a current status of Request Finished or Item Shipped.</td>
</tr>
</tbody>
</table>
# Requests Finished and Cancelled

**Status:** Report Generated: 10/4/2006 12:51:33 PM

<table>
<thead>
<tr>
<th>Begin Date</th>
<th>9/01/2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>10/01/2006</td>
</tr>
<tr>
<td>Sites</td>
<td>LSHI</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reason For Cancellation</th>
<th>Number Cancelled</th>
<th>Percentage of Total Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aval - Periodicals See Notes</td>
<td>34</td>
<td>4.90%</td>
</tr>
<tr>
<td>Other</td>
<td>31</td>
<td>4.47%</td>
</tr>
<tr>
<td>Aval - Stacks, See Notes</td>
<td>20</td>
<td>2.33%</td>
</tr>
<tr>
<td>This is a duplicate request</td>
<td>16</td>
<td>2.31%</td>
</tr>
<tr>
<td>Other</td>
<td>15</td>
<td>2.16%</td>
</tr>
<tr>
<td>Aval - Electronic Access, See Notes</td>
<td>13</td>
<td>1.37%</td>
</tr>
<tr>
<td></td>
<td>12</td>
<td>1.73%</td>
</tr>
<tr>
<td>We have exhausted all possible sources</td>
<td>10</td>
<td>1.44%</td>
</tr>
<tr>
<td>Too new for an interlibrary loan</td>
<td>7</td>
<td>1.01%</td>
</tr>
<tr>
<td>Unable to verify your request as cited</td>
<td>5</td>
<td>0.72%</td>
</tr>
<tr>
<td>Aval - Microforms, See Notes</td>
<td>4</td>
<td>0.59%</td>
</tr>
<tr>
<td>Unable to Borrow Dissertation/Thesis</td>
<td>1</td>
<td>0.14%</td>
</tr>
<tr>
<td>We could not fill your request by your deadline</td>
<td>1</td>
<td>0.14%</td>
</tr>
</tbody>
</table>

Total Number of Requests Finished: 525
Total Number of Requests Cancelled: 169
Patron Processes

- Only register once, no re-keying of personal information
- Track in-process and finished requests
- Retrieve electronic requests
Odyssey (Electronic Delivery)

- Import articles from Ariel
- Interface directly with other Odyssey libraries
- Document Delivery module
- Odyssey stand alone
Electronic Delivery/Odyssey Borrowing Processing
Odyssey
Lending Processing
Get the Most from ILLiad

- Billing
- Customize messages, book bands, notices
- Upload from DOCLINE or other ISO ILL systems
- Automatically upload bibliographic information from LOUIS and other databases--Open URL
**Describe the item you want**

<table>
<thead>
<tr>
<th>Title of Journal or Conference Proceedings, Anthology, etc. (Please do not abbreviate unless your citation is abbreviated) (required)</th>
<th>SLA Social Science Division Bulletin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volume number</td>
<td></td>
</tr>
<tr>
<td>Issue Number</td>
<td></td>
</tr>
<tr>
<td>Month</td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td>2005-12-01</td>
</tr>
<tr>
<td>Inclusive Pages (required)</td>
<td>7-9</td>
</tr>
<tr>
<td>ISSN/ISBN (Int. Standard Serial/Book No.) (If given will speed request processing)</td>
<td>10417737</td>
</tr>
<tr>
<td>Author of Article or Chapter</td>
<td>Gilmore, Susan R.</td>
</tr>
<tr>
<td>Title of Article or Chapter (required)</td>
<td>A Day in the Life: My Job is Changing.</td>
</tr>
<tr>
<td>Not Needed After Date (format: MMM/DD/YYYY) (required)</td>
<td>04/01/2007</td>
</tr>
</tbody>
</table>

**Where did you learn about this item?**

<table>
<thead>
<tr>
<th>Where did you find this item cited?</th>
<th>EBSCOHost Library, Information Science &amp; Tech</th>
</tr>
</thead>
<tbody>
<tr>
<td>Examples are databases like Expanded Academic Index, WorldCat, Medline, or a specific journal</td>
<td></td>
</tr>
</tbody>
</table>

**Other notes:**

- The MAXIMUM I am willing to pay is:  
- Also supply budget number if these charges should be charged to your department account.
Major Advantages

- Efficient processing and tracking of requests
- Automates many ILL processes
- ILL processes in one interface
- Reports
- Patrons love it!
- LOUIS and ATLAS support
Some Considerations

- Requires systems or IT staff, especially for initial implementation and electronic delivery
- Price?
- Can be complicated system--Start with Lending
Requirements (Minimum)

- **Hardware**
  - Intel Pentium II
  - 64 MB RAM
  - 2GB hard drive
  - Ethernet connectivity to Internet
  - Printer (Atlas recommends color)
  - Scanner with TWAIN driver for Odyssey
Requirements (Minimum)

- **Software**
  - Windows 2000 or XP
  - Microsoft Word 97 or higher
  - Internet Explorer 6.0 or higher
ILLiad Information and Support

- LOUIS web pages
  - Click on “Documentation”
- Atlas Systems, Inc.
- Odyssey Stand-alone
- OCLC ILLiad
  - [http://www.oclc.org/illiad/](http://www.oclc.org/illiad/)