

How to Set Temporary Interlibrary Loan Service Closures (Staff Holidays) in Outlook OnLine

Temporarily closing your library for the holidays or another reason such as renovations? Set-up a Holiday List to allow your library to be skipped as a Lender. If you have Patron-Initiated ILL activated, where your patrons have the ability to search and submit requests directly in Outlook OnLine, you can also suspend it during closures. **Problems with your holiday list?** Please contact the [OLOL Administrative Support Centre](#) immediately to report any bugs or issues.

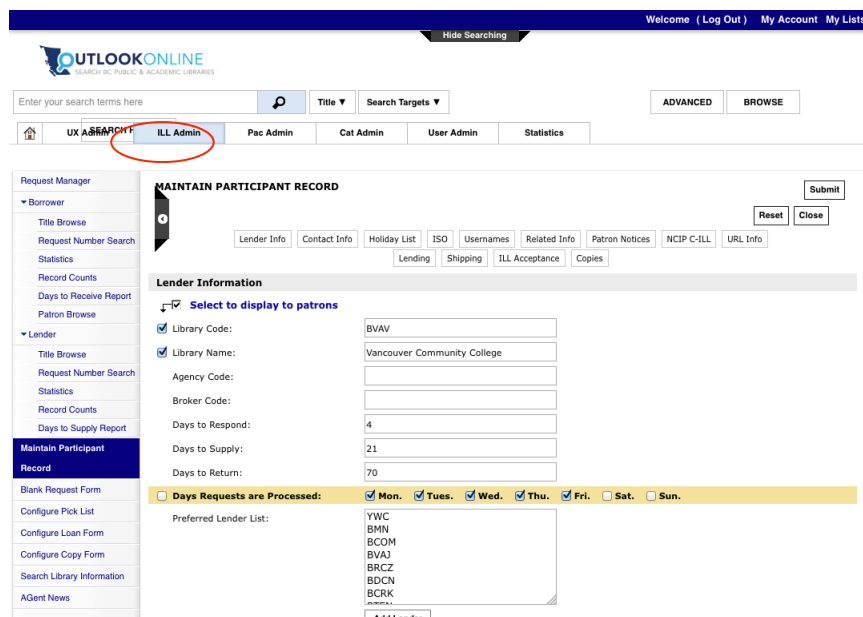
1. How to Suspend Lending in Outlook OnLine

It is a recommended best practice to set-up a Holiday List in Outlook Online as a Lender if your library is suspending lending due to ILL staff holidays, renovations or any other reason such as an internet outage. If a request arrives at your library and it is currently on 'holiday' (exception noted below), your library is "skipped" and the request is forwarded (cycles) to the next lender in the Lender List. The History note indicates a date after which the borrower may try again. If a lender is skipped, the request will appear in the Retry status if there are no other lenders on the Lender List.

Exception Please Note: The system may also send you requests near the end of your holiday closure if it calculates that you will re-open before the request would have normally moved on to a new lender. For example, if you re-open on January 4th and you return to find requests that were sent to you on January 2nd, it is because the system checked and found that you would have 2 days to reject/approve the request once you re-opened. EG. 4 Days to Respond - 2 Days Left Before Re-Open Date = 2 Days Left to Reply to Request. This does seem strange - but this is how Auto-Graphics has told us the system is responding!

We recommend that you add a few extra days, past your actual re-open End Date, if you'd prefer to return to zero Pending Requests. You can also add extra days to the beginning of your holiday closure date, the Start Date, if you'd prefer that the system stop sending you requests to deal with on your last day before holidays.

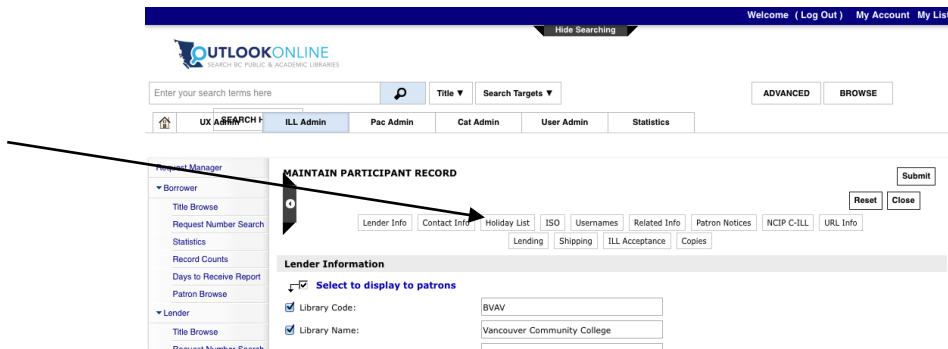
From the **ILL Admin tab**, select from the left hand banner **Maintain Participant Record**.



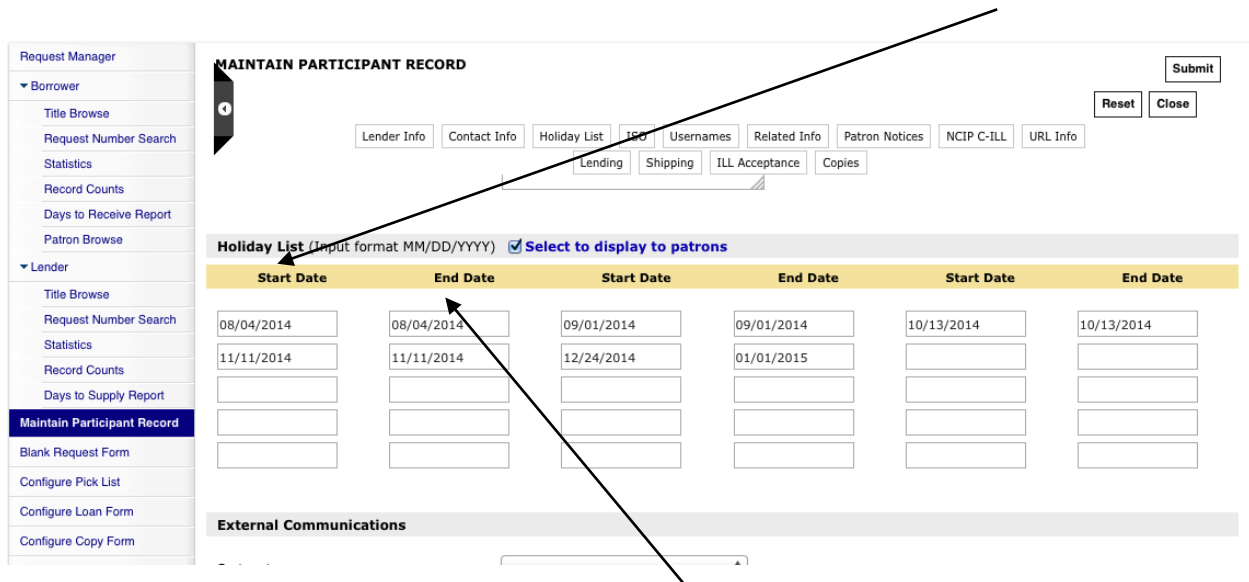
The screenshot shows the Outlook Online interface with the 'ILL Admin' tab selected. The 'Maintain Participant Record' form is displayed, showing details for library BVAV (Vancouver Community College). The 'Days Requests are Processed' section is highlighted in yellow, showing checkboxes for days of the week: Mon., Tues., Wed., Thu., Fri., Sat., and Sun. The 'Preferred Lender List' includes YWC, BMN, BCOM, BVAJ, BRCC, BDCN, and BCRK.

Field	Value
Library Code	BVAV
Library Name	Vancouver Community College
Agency Code	
Broker Code	
Days to Respond	4
Days to Supply	21
Days to Return	70
Days Requests are Processed	<input checked="" type="checkbox"/> Mon. <input checked="" type="checkbox"/> Tues. <input checked="" type="checkbox"/> Wed. <input checked="" type="checkbox"/> Thu. <input checked="" type="checkbox"/> Fri. <input type="checkbox"/> Sat. <input type="checkbox"/> Sun.
Preferred Lender List	YWC BMN BCOM BVAJ BRCC BDCN BCRK

From the menu, at the **top of the Maintain Participant Record**, click on the **Holiday List** button or scroll down the page to the Holiday List section.



Follow the Input format specified (MM/DD/YYYY). Holidays should be entered in the list only when the holiday falls on a business day (a day when the library would normally be open). Enter the first day interlibrary loan service is closed in the upper left hand box under the heading Start Date.



Next enter the end date in the box under the holiday End Date. To set Holiday Dates, **click on the Submit** button at the top of the page. **Remember to add extra days to your End Date if you'd prefer to return to an empty Pending requests list.**

You can enter multiple dates for Holiday List closures at one time. The Auto-Graphics system deletes dates from the Holiday List once the holiday closure dates have passed.

2. How to Suspend Patron Requesting in Outlook Online – For those libraries with Patron Initiated ILL

For those libraries offering patron-initiated ILL requesting, you may choose to suspend the ability for your library's patrons to submit requests during a suspension of ILL service. If you have set your Holiday List to be skipped as a Lender, this does not stop your patrons from submitting requests. It is a recommended best practice to suspend patron requesting during ILL staff holidays or because of a renovation etc. However, it is the discretion of the library to leave patron requesting open and process the awaiting requests when ILL service resumes.

Unlike using the Holiday List the following change is immediate. Therefore this should be done on the last day before suspension.

To close patron requesting, go to the **ILL Admin** tab. From the left hand menu select **Maintain Participant Record**. Scroll down until you see **Show Request This Button**, and **uncheck the checkbox next to Guests**. Click **Submit** at the top right corner of the page to save the change.

The screenshot shows the 'MAINTAIN PARTICIPANT RECORD' page in Outlook Online. The left-hand menu is expanded to 'Maintain Participant Record'. The main content area has several tabs: Lender Info, Contact Info, Holiday List, ISO, Usernames, Related Info, Patron Notices, NCIP C-ILL, and URL Info. Below these tabs are various configuration options:

- Primary Default Lender: [Text Field]
- Secondary Default Lender: [Text Field]
- Notes (700 characters max): [Text Area]
- Move Request with Patron Note to Awaiting Approval?: Yes No
- Show Blank ILL Form: Staff Patrons Institutional Guests Guests - Require Login
- Show Request This Button: Staff Patrons Institutional Guests Guests - Require Login
- Show Item Due Date to Patron: Yes No
- Show Patron Willingness To Pay Message: Yes No
- Display History Information: Oldest First Newest First
- Calculate Renewed to Date: Add to original due date Add to Accept Renewal date
- "Any Edition is Acceptable": Yes No
- Checked as default: Shipped Status Only Both Shipped and Returned

Buttons for 'Submit', 'Reset', and 'Close' are located at the top right of the form area.

To test, sign out of Outlook Online. Search for any title – there should be no Request This Item button displayed. This confirms patron initiated ILL requesting is disabled.

When ILL service resumes and staff are ready to process requests - preferably on the first day back from holiday - you need to enable patron requesting by repeating the above and ensuring the box beside Guest is checked again. Don't forget to click Submit to save the change!

Patron initiated ILL requesting is now enabled. To test, sign out of Outlook OnLine and search for any title - the Request This Item button should display.

Last Revised: December 7, 2015