

## Enhanced Request This Item: Functionality and Changes to ILL Request Workflow

As a means of increasing efficiency, and as part of the move towards patron-initiated ILL, libraries are encouraged to turn on ERTI functionality. This document outlines what ERTI is, and the changes to the ILL workflow that will result from turning on ERTI (which is sometimes informally referred to as the “Search Selected Sources,” or Triple-S, functionality by Auto-Graphics).

### What is ERTI?

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ERTI (Enhanced Request This Item) is a new matching algorithm used by Outlook Online to build the Lender Lists. It matches the book being searched for against the holdings of libraries in order to build the best and most complete list of libraries that can lend it.

Auto-Graphics is recommending that ERTI be turned on for all BC libraries. Right now, many BC libraries are still using an older version of the matching algorithm. ERTI can be turned on for libraries one by one when they are ready.

### What are the advantages of ERTI?

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- ERTI will place the holdings of Z-targets (i.e., UBC, SFU, UVic, etc.), if they are available as search targets, on the Lender Lists. Currently, they have to be added manually.
- ERTI will add all holdings from all libraries into the Lender Lists, rather than just the libraries from the first master record. In the example below, hitting “Request” would only put one library in the Lender List. Having ERTI turned on would merge the two records and put 23 holdings on the Lender List.

#### Location Information - BOOK

[OutLook Online](#)  
[OutLook Online](#)

1 owning library.  
22 owning libraries.

- ERTI can intelligently assess the Lender Lists based on the holding libraries’ policies and current shelf statuses. For example, if ERTI determines that a holding library’s policies prohibit it from lending the item, or if the shelf status is currently “on loan,” ERTI will pass over the library when forwarding the request to potential lenders on the Lender List.

### What is the new workflow with ERTI turned on?

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The most significant change that will occur when ERTI is turned on is the addition of an “Awaiting Lenders” status. This status appears before the ILL request moves to the “Awaiting Approval” status.

#### A Breakdown of the New Workflow:

1. An ILL request is submitted by clicking “Request This Item” next to an item in Outlook Online.
2. The request enters the Awaiting Lenders status as the Lender List is generated. The item will only remain in the Awaiting Lender status for a couple of minutes; it is not advisable to make any changes to the request in the Awaiting Lenders status, as this will disrupt on-going processes.

Depending on the ILL permissions granted to the requester (see “Editing the Lender List” below), the request either

- 3a. Automatically enters the Awaiting Approval status once the Lender List is generated, and must then be approved before being forwarded to a lender, or
- 3b. Is automatically forwarded to the first lender in the Lender List.

### What is the Awaiting Lenders Status?

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During the “Awaiting Lenders” status, the Outlook system first searches all libraries that are available as search targets from your library’s Preferred Lender List and then the System Wide lender list. The Lender List is then populated with libraries that have the item available from **both** these lists.

**NB:** The ILL request system searches for lenders independently of the databases/libraries that were selected when the initial Outlook search was conducted.

The processing of the Lender List occurs in the background. Once it is completed and the Lender List is generated, the request automatically moves to the “Awaiting Approval” status or is forwarded to the first lender on the Lender List, depending on your library’s ILL permissions.

### Editing the Lender List:

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If you regularly need to edit the Lender List for ILL requests that you submit, make sure that the Automatic Approval permission has been **disabled** for your user account. This will ensure that all ILL requests that you submit will be placed in the Awaiting Approval status (after the Awaiting Lenders processing is completed), which in turn will allow you to edit the Lender List.

The Automatic Approval permission is specific to each user. Turning this permission on/off for each specific user can be done in the library’s admin account, under Staff Menu > User Admin.



For instructions on how to enable or disable the Automatic Approval permission, refer to the **User Administration in Outlook** guide, available here: <http://www.eln.bc.ca/view.php?id=2179>.

### Multi-Copy Requests:

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To submit a multi-copy request (i.e., request multiple copies of a single item), make sure you are logged on to the Outlook system. Once you have logged in, look for the item that you wish to request, and then **click on the record** for the item. Once you are in the item’s record, scroll down and look for the Staff Function box:

The screenshot shows a library catalog interface. On the left, there is a 'My Lists' section with a list of test items (Test, Test2, Test3, Test4, Test5) and their counts. Below it is an 'Active List Detail - Test' section with a checkbox and the text 'Bertrand Russell and the Bri...'. A red box highlights the 'Staff Function' menu, which includes options: Print This Item, Email This Item, Download Record, Copy Cataloging, and Multi-Copy. The main area displays book details for 'Harry Potter and the Order of the Phoenix' by J.K. Rowling, including format, system number, ISBN, author, title, publisher, date, description, and note on. Below the details is a table showing location, ILL Lender?, call number, and availability.

Location	ILL Lender?	Call Number	Available
Curriculum Collection (BVAS)	[ILL Lender]	PZ 7 R79835 H377925 2003	IN LIBRARY
Curriculum Collection (BVAS)	[ILL Lender]	PZ 7 R79835 H377925 2003 c.2	IN LIBRARY

In the Staff Function box, click on “Multi-Copy” and then fill out the ILL request form. This is the same ILL request form as you would normally see, but there is an added “Number of Copies Needed” field:

Pickup Location Options:

Max Cost:  CAD

**\*Number of Copies Needed: (over 1 creates multiple requests):**

Borrower: ELNN2 BC Electronic Library Network

Borrower's Phone:

Borrower's Notes:

### Further Background:

Several BC libraries have been piloting ERTI and there have been no reports of problems. Auto-Graphics introduced ERTI several years ago. In that time, most libraries across North America have switched over. BC is one of the last A-G customers still using the old algorithm.