



ERTI (Enhanced Request This Item): Functionality and Changes to ILL Request Workflow

As a means of increasing efficiency, and as part of the move towards increased patron-initiated ILL, libraries were encouraged to turn on ERTI functionality in 2014/15. This document outlines what ERTI is, and the changes to the ILL workflow that resulted 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?

ERTI (Enhanced Request This Item) is a new matching algorithm used by Illume (formerly 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.

ERTI has now been turned on for all BC libraries since 2015.

What are the advantages of ERTI?

- 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, previously hitting “Request” would only put one library in the Lender List. Having ERTI turned on merges the two records and puts 23 holdings on the Lender List.

Location Information - BOOK	
OutLook Online	1 owning library.
OutLook Online	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. *This is why some codes may not be added to the Lender List even though the library has attached their Holdings.*

What is the new workflow with ERTI turned on?

The most significant change that occurs with ERTI 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 Illume.
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.

Warning: If you notice requests stuck in “Awaiting Lenders” for longer than a few minutes (or overnight) please let us know as Auto-Graphics may need to restart some scripts.

If a request is stuck you can also manually change the status to “Add Lenderlist Mediated” and Submit to send it to your Awaiting Approval. You may need to manually update the Lender List also if you force a request out of Awaiting Lenders.

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 (if Automatic Approval is activated on the account).

What is the Awaiting Lenders Status?

During the “Awaiting Lenders” status, the Illume system first searches all libraries that are available as search resources/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.

Important Note: The ILL request system searches for lenders independently of the databases/libraries that were selected when the initial Illume 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:

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 Accounts Setup Tips** guide, available here:

https://illumebc.ca/sites/default/files/misc_files/User_Account_Setup.pdf

Multi-Copy Requests:

To submit a multi-copy request (i.e., request multiple copies of a single item), make sure you are logged on to the Illume 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 **Full Details** record, look for the **Staff Function** box and **Multi-Copy** option. Using the Multi-Copy option allows the system to automatically generate your lender list using ERTI and split all lenders between your multiple requests so no request has overlapping lenders.

More information in our guide here: https://illumebc.ca/guides/multi_copy