The purpose of this document is to provide a description of the current Minnesota interlibrary loan environment and provide an overview of how users and staff members of the various library systems will search, communicate, and carry out interlibrary loan transactions with each other. This report is intended to address the MnLINK Interlibrary Loan Subcommittee’s charge to “Develop scenarios/workflow charts demonstrating the interrelationships of Aleph ILL, ZPORTAL, VDX, and any other ISO compliant software systems.”

Describing the current interlibrary loan environment in Minnesota presents a challenge because patterns have already started to shift with the implementation of the MnLINK Gateway interlibrary loan software (VDX). However, the models that have served us well in the past will continue to influence future developments, so it is worth describing both where we started from and where we are right now.

Minnesota libraries, in general, have made use of local organizations and consortia, and common integrated library systems (ILS) in establishing partnerships for the purpose of resource sharing. Examples include the regional library system such as SELCO, the CLIC consortium of private Twin Cities colleges, and MnSCU/PALS. These partnerships are expected to continue to affect the choice of borrowing partners in the future, based as they are on proximity, effective delivery systems, similar types of patron needs, or shared catalogs. MINITEX also has played, and will continue to play, a crucial role in facilitating interlibrary loan in Minnesota, both because it draws directly from the largest, most diverse collection of library material in the state, that of the University of Minnesota, Twin Cities campus, and because it manages the referral of requests to other libraries in Minnesota, North & South Dakota, and Wisconsin, where direct borrowing arrangements do not exist.

Minnesota libraries are currently using a variety of methods in their interlibrary loan transactions with one another. Libraries interact with each other using paper, phone, or fax requests, e-mail requests, the PALS interlibrary loan module, OCLC’s interlibrary loan system, or by placing direct holds on items in each others’ catalogs. For the most part, libraries currently operate within well-established protocols for exchanging requests with one another. If they do not have a direct relationship, they rely on MINITEX to serve as an intermediary in facilitating both the request and the delivery of the material.
MINITEX, in interacting with all these libraries, uses either a web-based request form to receive requests from member libraries, or uses one of the methods mentioned earlier.

Recently, many public library systems, the CLIC libraries (lending only), and MINITEX have begun using Fretwell Downing’s VDX interlibrary loan management software, also known as the MnLINK Gateway ILL system to transmit requests. In the future, many Minnesota libraries will also be using the ILL module of Ex Libris’s Aleph, another ISO compliant system.

The use of VDX, ALEPH ILL, and other ISO compliant interlibrary loan software will allow for more direct transmission of requests from one library to another with patron initiated, unmediated requesting as an option. The following pages illustrate for users of each of the listed interlibrary loan systems how the request for an interlibrary loan will be placed and filled.
Interlibrary Loan in the PALS Environment

Patron Perspective

A Patron of a PALS library may search and enter an ILL request from either the PALS interface (WebPALS catalog) or the ZPORTAL interface (MnLINK Gateway.)

**WebPALS Interface**

1. When searching WebPALS, the patron will click the interlibrary loan button on the record of the desired material.

2. The patron will be asked to provide their library barcode and password for authentication, which is verification that they have a valid and acceptable (not blocked) status.

3. When the patron is authenticated, the request will then go unmediated to any direct borrowers on the borrowing library’s “Unmediated ILL Borrow List,” or go to the borrowing library’s interlibrary loan office, via the PALS message file, for mediated processing.

4. The patron will either receive the request through electronic or physical delivery, if filled, or receive a NOS message informing them that the request will not be filled.

5. The patron can monitor the status of the request through the WebPALS interface, by clicking on “Patron Information and Requests,” and choosing “Display items linked to your patron record.”

**ZPORTAL (MnLINK Gateway) Interface**

1. The patron searches in the ZPORTAL (MnLINK Gateway) interface and selects an item to request.

2. The patron is asked to log in so that ZPORTAL can check their PALS patron record to verify that they have a valid and acceptable (not blocked) status.

3. Once the patron is authenticated, the request can be entered. If properly authenticated, the patron is presented with an ILL request form to complete in the ZPORTAL interface.

4. When the request form is submitted in the ZPORTAL interface, it is transferred to the PALS ILL software for management, either to the borrowing library’s direct borrowers or to the PALS ILL message file for staff mediation.
5. The patron will either receive the request through electronic or physical delivery, if filled, or an NOS message informing them the request will not be filled.

6. The patron can monitor the status of the request through: 1) the WebPALS interface, by clicking on “Patron Information and Requests,” and choosing “Display items linked to your patron record,” or 2) the ZPORTAL interface, which will transfer the patron into the WebPALS interface.

Staff Perspective

1. Whether the patron of a PALS library searches and enters an ILL request from the WebPALS interface or the ZPORTAL interface (MnLINK Gateway), the request is managed in the PALS ILL software.

2. The request will either be processed in an unmediated fashion, routing the request automatically through a list of preferred direct lenders (Unmediated ILL Borrow List) that has been set up on PALS by the ILL staff, or staff may mediate the request, manually deciding where to send the request for filling or “not supply” it for a stated reason.

3. Whether mediated or unmediated, the ILL request can be sent to other PALS lenders, or to lenders outside the PALS environment. The ISO functionality is used to transfer the request to non-PALS lenders’ ILL management software (such as MnPALS, VDX, OCLC, etc.). In turn, requests can be accepted within the PALS ILL software from these non-PALS locations (as borrowers) via ISO functionality.
Interlibrary Loan in the VDX Environment

Patron perspective

A patron of a VDX library may search and enter an ILL request from the ZPORTAL interface of the MnLINK Gateway. ZPORTAL is the searching interface that replaces OCLC’s SiteSearch in February 2004.

1. In the process of initiating an ILL request in ZPORTAL, the patron is asked to log on with their library card number (and PIN if needed) so that ZPORTAL can check their patron record(s) to verify the patron as having a valid and acceptable (not blocked) status at both their home library and the library they have chosen as pickup location, if different. The pickup location library will manage the request.

2. Patron is authenticated and enters an ILL request.

3. The ILL request is managed through the VDX software, which may include mediated processing, requiring staff to review the request and approve it for transmission; or unmediated processing, transmitting the request automatically through a list of preferred lenders that has been set up by the ILL staff.

4. The patron can monitor the status of the request through the ZPORTAL interface of the MnLINK Gateway.

Staff perspective

1. When a patron of a VDX library enters an ILL request from the ZPORTAL interface of the MnLINK Gateway, the request is managed in the VDX ILL software.

2. Staff may mediate the request, reviewing and approving the request before transmission, or process it in an unmediated fashion, routing the request automatically through a list of preferred lenders that have been set up by the ILL staff.

3. Whether mediated or unmediated, the ILL request can be sent to other VDX lenders, or to lenders outside the VDX environment. To send to non-VDX lenders, the ISO functionality is used to transfer the request into the other lenders’ ILL management software (such as OCLC, MnPALS, PALS, etc). In turn, requests can be accepted from these non-VDX locations (as borrowers) via ISO functionality.
## Current VDX Libraries

<table>
<thead>
<tr>
<th>Code</th>
<th>Library Name</th>
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<tbody>
<tr>
<td>ANK</td>
<td>Anoka County Library</td>
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<tr>
<td>ALV</td>
<td>Arrowhead Library System</td>
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<tr>
<td>MNA</td>
<td>Augsburg College</td>
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<tr>
<td>MNK</td>
<td>Bethel College</td>
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<tr>
<td>BTA</td>
<td>Bethel Seminary</td>
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<td>CCE</td>
<td>Carver County Library System</td>
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<td>SMC</td>
<td>College of St. Catherine, Minneapolis</td>
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<td>MNE</td>
<td>College of St. Catherine, St. Paul</td>
</tr>
<tr>
<td>MNC</td>
<td>Concordia University, St. Paul</td>
</tr>
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<td>DCB</td>
<td>Dakota County Library</td>
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<tr>
<td>ETC</td>
<td>East Central Regional Library</td>
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<tr>
<td>GRR</td>
<td>Great River Regional Library</td>
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<tr>
<td>MHA</td>
<td>Hamline University, Bush Library</td>
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<tr>
<td>MHL</td>
<td>Hamline University, Law Library</td>
</tr>
<tr>
<td>HCO</td>
<td>Hennepin County Library</td>
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<tr>
<td>KRL</td>
<td>Kitchigami Regional Library System</td>
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<td>LAL</td>
<td>Lake Agassiz Regional Library</td>
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<td>Macalester College</td>
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<td>MPI</td>
<td>Minneapolis Public Library</td>
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<td>NRG</td>
<td>Northwest Regional Library</td>
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<tr>
<td>NOW</td>
<td>Northwestern College</td>
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<tr>
<td>MLM</td>
<td>Plum Creek Library System</td>
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<td>RCL</td>
<td>Ramsey County Library</td>
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<td>SSH</td>
<td>Scott County Library System</td>
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<td>S#L</td>
<td>Southeastern Libraries Cooperating (SELCO)</td>
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<td>SPP</td>
<td>St. Paul Public Library</td>
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<td>MNT</td>
<td>University of St. Thomas, O'Shaughnessy-Frey Library</td>
</tr>
<tr>
<td>TL#</td>
<td>University of St. Thomas, Law Library</td>
</tr>
<tr>
<td>XOL</td>
<td>Viking Library System</td>
</tr>
<tr>
<td>WLM</td>
<td>Washington County Library</td>
</tr>
<tr>
<td>MII</td>
<td>MINITEX – University of Minnesota, Twin Cities &amp; Referral</td>
</tr>
</tbody>
</table>
Patron perspective

A patron of a MnPALS (Aleph) library may search and enter an ILL request from either the Aleph interface (MnPALS Web OPAC) or the ZPORTAL interface (MnLINK Gateway).

MnPALS (Aleph) Interface

1. In the process of initiating an ILL request in the MnPALS Web OPAC interface, the patron is asked to log on so that their MnPALS patron record can be checked to verify them as having a valid and acceptable (not blocked) status.

2. Patron is authenticated and enters an ILL request.

3. The ILL request is managed through the Aleph ILL software, which may include mediated processing, requiring staff to manually review the request and/or decide where to send it for filling; or unmediated processing, routing the request automatically through a list of preferred lenders that have been set up by the ILL staff.

4. The patron can monitor the status of the request through the MnPALS Web OPAC interface.

ZPORTAL (MnLINK Gateway) Interface

1. The patron searches in the ZPORTAL (MnLINK Gateway) interface and selects an item to request.

2. The patron is asked to log on so that ZPORTAL can check their MnPALS patron record to verify them as having a valid and acceptable (not blocked) status.

3. If properly authenticated, the patron is presented with an ILL request form to complete in the ZPORTAL interface.

4. When the request form is submitted in the ZPORTAL interface, it is transferred to the Aleph ILL software for management, which, as above, may include mediated or unmediated processing.

5. The patron can monitor the status of the request through the MnPALS Web OPAC interface or through the ZPORTAL interface, which will transfer the patron into the MnPALS Web OPAC interface.
Staff perspective

1. Whether a patron of a MnPALS (Aleph) library searches and enters an ILL request from the Aleph interface (MnPALS Web OPAC) or the ZPORTAL interface (MnLINK Gateway), the request is managed in the Aleph ILL software.

2. Staff may mediate the request (manually review the request and/or decide where to send it for filling), or process it in an unmediated fashion (routing the request automatically through a list of preferred lenders that have been set up by the ILL staff).

3. Whether mediated or unmediated, the ILL request can be sent to other MnPALS (Aleph) lenders, or to lenders outside the MnPALS environment. To send to non-MnPALS lenders, the ISO functionality is used to transfer the request into the other lenders’ ILL management software (such as OCLC, VDX, PALS, etc). In turn, requests can be accepted within the MnPALS ILL software from these non-MnPALS locations (as borrowers) via ISO functionality.
Current MnPALS (Aleph) Libraries

Beta Group (August 2003):

SCS  St. Cloud State University
SJU  St. John’s University
CSB  College of St. Benedict
MSL  State Law Library

Gamma Group (February 2004):

GAC  Gustavus Adolphus
LRL  Legislative Reference
MHS  Minnesota Historical Society
MSU  Minnesota State University, Mankato
RAL  Riverland, Albert Lea
RAU  Riverland, Austin
SCF  South Central, Faribault
SCM  South Central, Mankato
UCR  University Center Rochester
WSU  Winona State University
MnLINK Timeline
(All dates are subject to change)

July 2002  
University of Minnesota, Twin Cities Campus goes live on Aleph version 14.2

July 2003  
University of Minnesota Coordinate Campuses go live on Aleph version 14.2

January 2003  
Fretwell-Downing version 2.27 VDX ILL software in production use

August 2003  
MnSCU PALS beta libraries go live on Aleph version 15.5

February 2004  
Fretwell-Downing version 2.7 of ZPORTAL/VDX goes live. Patron initiated interlibrary loan via the gateway is available

February 2004  
ISO pilot test between VDX and PALS locations

Feb/Mar 2004  
MnSCU PALS gamma libraries go live on Aleph version 15.5.2

Feb/Mar 2004  
Ex Libris Aleph interlibrary loan software available to the MnSCU PALS beta and gamma libraries

March 2004  
ISO pilot test between PALS and Aleph ILL locations

June 2004  
MnSCU PALS implements version 16.02 of the Ex Libris Aleph software – ILL available

July 2004  
University of Minnesota implements version 16.02 of the Ex Libris Aleph software – ILL available

July 2004  
ISO pilot test between Aleph ILL and VDX locations

December 2004  
MnSCU PALS implements version 16.03 of the Ex Libris ILL software – Increased ILL functionality

January 2005  
MnSCU PALS delta libraries go live
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