

Processing Borrowing Requests

Please remember: If a student requests more than 3 articles from the same journal title and we have to pay copyright for them, please contact the student and ask them if it is necessary. Ask if we can cut back 2 or 3 articles and nothing more than that. Likewise, if the request can only be filled by a charging library we don't want to do too many of these either. It would be best to contact a supervisor before ordering items that will cost the library money.

Awaiting VC * Request Processing

1. Click the **Borrowing Tab** in the middle of the screen
2. Double click the **Awaiting VC Emp Request Processing Queue** or **Awaiting VC Patron Request Processing Queue**- in the middle of the screen
3. Double Click on a request
4. Click on the Z39.50 tab for a Loan or the A-Z List Tab for a journal. OR, you can perform a search in a web browser using 1. PRIMO – the online catalog, 2. EDS, and the 3. Journals A-Z List
5. **FOR LOANS**
 - a. Using the **Z39.50** search function- if we have the item it will appear near the bottom under Location and Call Number. You can double click on this line to apply it to the Detail Tab
 - i. If the "Availability" field reads "In Use" then this item is currently checked out and the book needs ordered
 - b. From the Detail Tab screen, route the request to Document Delivery by clicking on the green arrow for "Route to Document Delivery" and choosing "**Awaiting DD Stacks Searching.**" Click on "**Yes**" to save the changes. Proceed to the **Document Delivery** section to further process this request.
 - c. If we do not own the item then order it.
6. **ARTICLES: You will want to search these multiple ways:**
 - a. **A-Z List Tab OR Journals A-Z List found on the library's webpage**
 - i. If using the **A-Z List Tab** you will have to copy and paste the journal title into the search box and click on "Search." Results will appear in the next screen. To view our holdings click on "Full Text Access" (a small blue link under journal title and search box.)
 - ii. If we own the item in print, or have online access, make note of this on the request form and then route the request to Document Delivery by clicking on the green arrow for "Route to Document Delivery" and choosing "**Awaiting DD Stacks Searching.**" Click on "**Yes**" to save the changes.

- iii. Proceed to the **Document Delivery** section to further process this request.
- b. Open the Internet and use the Primo Catalog
 - i. Perform a search of the journal title. If we own the item in print, or have online access, make note of this on the request form and then route the request to Document Delivery by clicking on the green arrow for “Route to Document Delivery” and choosing “**Awaiting DD Stacks Searching.**” Click on “**Yes**” to save the changes.
 - ii. Proceed to the **Document Delivery** section to further process this request.
 - c. Perform a Google search
 - i. Perform a Google search of the article title to try and locate free text available via the web. If you can find full text from a reputable source download the pdf and save it using the TN number. Copy the URL you used and paste it into the Notes field of the request screen. In the Call Number box type “Free on Internet,” click save at the top of the screen, and click on the green arrow for “**Route to Document Delivery**” and choose “Awaiting DD Stacks Searching”. Click on “**Yes**” to save the changes.
 - ii. Proceed to the **Document Delivery** section to further process this request.
 - d. Use EDS
 - i. Perform a Search of the article title in our EDS database - trying to locate full text pdf access. You may also need to perform searches in ProQuest for Dissertations, JSTOR, and Science Direct. If you locate full text pdf then download the Pdf and save it to your desktop/folder as the TN Number. On the Detail Tab screen, in the Call Number box type the name of the database and click save at the top of the screen. Then click on the green arrow for “**Route to Document Delivery**” and choose “*Awaiting DD Stacks Searching.*” Click on “**Yes**” to save the changes.
 - ii. Proceed to the **Document Delivery** section to further process this request.

To Order Loans AND/OR Articles through OCLC

1. From the Details Tab: Click on the **OCLC Tab** (after performing a Z93.50/Primo/A-Z List/EDS/Google search)
2. Click on the search you want executed (ISSN, Title, Keyword, etc.)
3. Many results may show up for your search. Choose the appropriate record from the list by clicking on it once. It will become highlighted in blue. The ISSN/ISBN, copyright dates, and Format column will help you find the best record to use.
 - a. Format Column: Book – means print material, Serial – means Print Journal, Internet – means Electronic Book or Electronic/Database holdings of a journal. Visual Materials are DVD/VCR tapes, Sound Recordings are DVDs
4. After highlighting the record, Click on the drop down arrow in the **Holdings icon** and select “Custom Holdings” this will give you two choices: select “**LVIS**” as your custom holdings choice
 - a. Choose “**FREEAV**” if you are ordering a DVD or CD’s
 - b. You can also choose “**LVIS**” from the Profile Groups –this will list libraries by state
5. Fill in your *Selected Lenders* box with library symbols by double clicking on each symbol. You can now choose up to 15 lenders at a time. You can also hover over each symbol to see if they charge a fee for articles or books. Libraries also are stating how many days it will take to fill a request. The top numbers are for article requests and the bottom numbers are for loan requests.
6. Click **Create Work Form**
7. You need to add your Constant Data information for Venango. Click on: Constant Data.
8. Does the information all look ok?
9. Click **Send Request** (on the form tab-right)
 - a. If you are ordering from a library that charges a fee, change the **MAX Cost** box to read the amount we wish to pay. **We do not want to pay more than \$15.** If the charge is more than that and the request is for a student, contact the student stating it is going to cost money and ask if they really need it. If it is for a professor we will probably pay up to \$25, but check with Terry. After any changes are made to this screen click on the “Save” icon in the top menu line. Then click the **Send Request**.
 - b. You can also change the borrowing notes if you wish. For example, if you want to order only volume 5 of a set you can put that in the borrowing notes. After any changes made to this screen click on the “Save” icon in the top menu line. Then click the **Send Request**.
 - c. The **Detail Tab** changes to show you what you have added-especially the Lender String and the OCLC number
10. On Detail Tab screen click **Request Sent** (on form tab-left) to finish the order.

Canceling a Borrowing Request

You would use this feature if someone put in a duplicate request, a request with a poor citation, a request that we already own and you do not want to send to Document Delivery, or for requests that will cost too much money to borrow, etc.

1. To cancel a request in Borrowing that has not been ordered, open the request from the **“Awaiting VC Emp or VC Patron Request Processing”** queue (by clicking on the **“Borrowing”** tab located in the middle of the screen)
2. Click on the **“Cancel Request”** icon located in the ribbon and choose the appropriate reason for canceling.
3. Click the check boxes for **“Send Notification”** and **“Edit Notification.”**
4. Click on the red letters that read **“Cancel Request”**
5. An outgoing email will open. Review the email and make any changes you wish. After making changes click on the **“Send”** icon located in the upper left hand corner.

Receiving a Book

1. Click on the *Borrowing Tab* located along the **top menu line in the ribbon**
2. Click on the **“Check in from Lending Library”** icon located in the *Borrowing Ribbon*
3. Click in the ILL Number box. Type or scan in the ILL number and hit enter
4. Verify the information. Make sure the right lender symbol is selected, make sure the correct address of the library is chosen.
 - a. If you need to choose the correct lender, click the appropriate bubble
 - b. If you need to change the address either click on the appropriate one listed or double click on the library name and this will bring up the **Add an Address** screen. Type in the Address information and click the green **“Add”** icon. Click the red **“x”** to exit out of the address screen.
 - i. If you are checking in a book that we never had borrowed from that library before, the Add and Address screen will automatically pop-up. Use the information from the book as well as clicking on the **“world”** for the Policies Directory to fill in the address, phone numbers, e-mail, fax, and Odyssey number. When finished with the Policies Directory click on the **“x.”** When Finished adding the library information click on the green **“Add”** then click the red **“x”** to return to the check-in screen.
 - c. If you are checking in an article, fill in the field for Page Numbers and select the **“Check in Scan Later Icon”** instead of the **“Check In.”**
 - d. If you are checking in an item and cannot locate any ILL information, go to the Main Screen by clicking on the **“Main Tab”** located in the middle of the screen. In the **Home** Tab of the ribbon, type in the name of the book in the **Citation Information** field. Search the title. Use either the TN Number or the ILL number shown on the request screen in the Check-in screen. (be sure to write the number down, exit out of the request screen, go back to the Check In screen, type the number in the appropriate box, enter, and verify the information before checking on **“Check – In”**)
5. Click on the **“Check in”** icon
6. Proceed this same process with all other incoming ILLiad borrowed books
7. To exit, click on the small red **“x”** located in the middle of the screen

The request will automatically move to the “Awaiting Post Receipt Processing” queue

Post Receipt Processing- To print Borrowing Loan Label

8. Click on the *Borrowing tab* located along the top menu line
9. Click on **“Print Receives”** icon located in the Borrowing ribbon
 - a. Do NOT choose the drop down menu, but just click the picture of the icon
10. This will bring up two pop up boxes. Choose the appropriate printer to print to.

11. Click on Print for the **Borrowing Loan Slips** and click on Print for the *Borrowing Loan Labels*
12. This will open two different merged documents in Microsoft Word
13. Go to File and Print for each
14. The long slip (horizontal) we will band the book with. See Brenda's Instructions. ?
15. Exit out of the Word Screen by clicking on the "x" and do not save the changes
16. Go back the ILLiad
 - a. This request will automatically move to "Awaiting Customer Contact" queue
17. Wait a few minutes and ILLiad will automatically contact customers. Keep refreshing the screen until the "Awaiting Customer Contact" queue changes to "**Customer Notified Via E-mail.**"

18. To Check the Item out:

19. Go to the Borrowing tab located along the top menu line
20. Click on the "Check out" icon
21. Scan or type in the ILLiad Transaction Number of the request
22. This should automatically update the item to "Checked Out to Customer." If it does not, click on "Auto Process" located in the ribbon.
23. After scanning the all transaction numbers exit out of this screen by clicking on the red "x"
24. Band the book with one of the labels.
- 25. Highlight the name of the patron and the due date.**
26. Take the borrowing book and place it on the Hold Shelves.

Returning a book In Borrowing and Label Printing

1. To mark and item returned click on the *Borrowing tab* located along the top menu line
2. Click on “**Check in**” (Do not click on the drop down menu, but just the picture part of the icon)
3. Scan the **Transaction number** or type it in and hit enter.
4. Click on “**Process Queue**”
5. Exit out of the check in screen by clicking on the “x” located in the middle of the screen beside the “Bath Process: Check Item In” tab.
6. You can also print return labels and return slips. After checking books in they move into the “**Awaiting Return Label Printing**” queue.
7. Click on the *borrowing tab* located along the top menu line. In the Ribbon, click on the “**Print returns**” icon.
8. You will be asked which printer you would like to print to. After selecting the printer, the labels and the return slips will automatically open in Word already merged. If you would like to print either one, go to file and print. If you do not want to print the labels or the slips or both, exit out of the word document without saving.
9. When finished with printing, exit out of the word document by clicking on the red “x” and do not save the changes.
10. Remove your filed paperwork for the book (Brenda’s Instructions).
 - a. Any of our paperwork banded on the book should be removed and thrown away. Any other paperwork gets returned with the book.
11. Place the book in a black bag to send to Clarion with a note stating IDS Number or mailing address or use the Return Mailing Label or Return Slip for this information and the Transaction Number.

The **Awaiting Return Label Printing queue should be cleared everyday. Please go through steps 7 to 9 to clear the labels and slips out each day.

Renewing Books in Borrowing:

Patron Initiated Renewals

- If the following queue appears on the borrowing side of ILLiad: **Renewed by Customer to 00/00/0000**
- Click on the Borrowing tab located above the ribbon
- Click on **Send OCLC Renewal Requests**
- Click on Ok.

You must wait to hear back from the lending the library. When you receive a response the following queues will appears: **Awaiting Renewal OK Processing** OR **Awaiting Renewal Denied Processing.**

- Double click on the **Awaiting Renewal OK Processing** queue
- The new due date will be located in the notes field at the bottom of the request
- Change the due date on the right hand side of the screen to the new due date.
- Click on the **save** icon at the top of the request screen.
- In the request ribbon, locate the **“Send Notification”** icon and click on the drop down menu arrow
- Choose to send the **“Renewal Approved”** email
- The email window will pop up
- Click on the **“Send”** icon.

OR

- Double click on the **“Awaiting Denied Renewal Processing”** queue
- Change the due date to the original due date (the original should be listed in the notes field.)
- Click on the **Save** icon at the top of the request screen.
- In the request ribbon, locate the **“Send Notification”** icon and click on the drop down menu arrow.
- Choose the **“Renewal Denied”**
- The email window will pop-up
- Click on the **“Send”** icon.

If a patron calls you or sends an e-mail and would like a renewal do the following

- Open ILLiad
- In the Home Tab type in the Transaction Number in the Number box
- Click enter on the keyboard
- The request will open. Click on **Renew Request** in the request ribbon
- Exit out of the screen and save any changes if it asks. Then proceed with the steps listed above for **“Awaiting Renewal Ok Processing”** or **“Awaiting Denied Renewal Processing.”**

OR if you just have the name of the patron

- Open ILLiad
- Click on the Home Tab
- In the Name field type in the name of the patron and click enter
- Locate the Title of the book the patron wishes to renew and double click on it.
- This will open the request.
- Click on the **“Renew Request”** in the request ribbon.
- Exit out of the screen and save any changes if it asks. Then proceed with the steps listed above for *“Awaiting Renewal Ok Processing”* or *“Awaiting Denied Renewal Processing.”*