

ILLiad Lending Requests

Done by ILL Staff

1. Clarion will send to your e-mail scans of requests that will need to be pulled from Suhr shelves.
2. Go to Stacks and pull items.
3. Once you have pulled items, open ILLiad
4. Go to the Lending Tab located along the top Menu line and click once on ***“Update Stacks Search Results.”***
5. Scan Transaction Number in the “Transaction Number” box.
6. Information for the transaction will appear in the middle and along the bottom of the screen.
7. Verify the Information.
8. For all items click on ***“Mark Found”***
9. If item is a loan check out in Alma to SUHR – Non CUP patron.
 - a. Place the book in a black bag to send to Clarion. Write a note including Transaction Number and Library Address
10. If the item is an article, set aside to scan.
 - a. You would only choose ***“Mark Found Scan Now”*** if you had an article that that was already scanned and ready to import or an article you had saved to your computer.
 - b. If an item is Not Found, cancel the request and choose the appropriate reason as to why.
 - a. You can also ***Conditionalize*** a request: you would choose this icon if you have a question about the request:
 - i. Ie. It is not specific enough, such as more than one volume, page numbers are different from article title, etc. ILL Staff will have to send an e-mail to the borrowing institution asking them to clarify as well as put a note in the ILLiad request asking the same thing.

Scanning/Awaiting Lending Scanning:

1. Click on the **“Lending Tab”** along the top menu and click on the **“Scanning”** icon.
 - a. OR: Click on the Lending Tab in the middle of the screen and then double click on the ***“Awaiting Lending Scanning”*** queue in the middle of the screen
2. Scan Transaction Number
3. Verify Information
4. Import the scan from the Copier

- a. If the library is an Odyssey Library: scan the article as a **.tif**.
 - b. If the library does not have Odyssey: scan the article as a **.pdf**.
 - c. Always scan the Request Page and the “Copyright Page” along with the article.
5. Crop the article and rotate pages as necessary.
 6. If the library will accept the article as an Odyssey, then the “**Send Via Odyssey**” icon will be lit up.
 - a. After cropping the pages click on “**Sending Via Odyssey**” and the request will be finished.
 - b. If the library does not have Odyssey, then the “**Send Via Article Exchange**” is the only icon that will be lit up. Click on “**Send via Article Exchange**”
 - c. Click the small “**X**” once to exit out of scanning.
 - d. File paperwork

Finding and saving a file using a database:

If you have located an article using a database or through a Google Search, it is easy to save it and import it into ILLIAD without having to print and scan.

1. Locate the article in a database.
2. Click on the PDF Link to open the article in Adobe
3. Locate the “Save” icon, and save the article as the Transaction Number to a specified file folder.
4. Go to ILLiad
5. Open scanning (whether it be Document Delivery or Lending)
6. Import the PDF
7. Send the file appropriately (Send as Odyssey in Document Delivery or Send as Article Exchange/ Odyssey in Lending)

Copier Setting for Scanning:

1. On copier, tap scanner button
2. Tap “Send File Type/Name,” and then tap *File Name*, list the Transaction/OCLC number and tap “Okay”
3. Under File Type/Name also tap “TIFF” or “PDF” for the file type and tap “Okay”
4. You may want to change the specific layout of your paper this - is under “Scan Setting”
 - a. You can also change the resolution (better quality scan with higher the number)
 - b. You can choose to scan in color under Scan Setting
5. Choose the name of the person you want to send the file too
6. Lighten the scan to the lightest level (located on the left)
7. Scan the item
8. Return to your desk, open your e-mail
9. Find the file you just sent and right click on the attachment
10. Save the file to your desktop, My Documents, etc. as the Transaction/OCLC number
11. Open ILLiad
12. Go to the Lending along the Top Menu line
13. Click on Scanning
14. Scan the Transaction Number
15. Verify Information
16. Click once on the “Import Image” icon
17. Choose the appropriate file to import and click on “open”
18. Pages will import
19. Crop as necessary
20. Click on Send Via Odyssey or Send Via Article Exchange, as appropriate
21. Click small “X”, once, to exit out of scanning

Returning in Lending

Another institution has borrowed a Venango book and has returned it

Checking Items In

1. Click on the Lending tab, located along the top
2. Click on **Lending Returns**
3. Scan the Transaction Number
4. The item is automatically Checked In and the Completed in OCLC
5. Click the small red **X** to exit out of the screen
 - a. If it doesn't automatically switch it from the "Item Shipped" status to "Request Finished" status, click on the "Process Queue" icon located in the Ribbon.
6. Open Alma and mark the book returned.

Printing Shipping Labels:

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1. To print shipping labels, click on the Lending Tab, located along the Top Menu line.
2. Then click once on "**Print Shipping Labels**"
3. Choose the appropriate printer and click "Print"; again you will be prompted to view merged document and template before printing
4. If you view merged document, process as normal and exit out of Word as normal; if you do not merge merged job or template the item will automatically print
5. If you choose not to print shipping labels you still need to click on the "**Print Shipping Labels**" icon, but click **Cancel** in the pop-up windows instead of opening the documents.

Reprinting:

Done by ILL Staff



1. To reprint any item go to the "double arrow" icon in the upper Left Hand corner of the ILLiad screen
2. Click on "Print Session"
3. Highlight the appropriate document you wish to print, by clicking on it once.
4. A pop-up window will appear wanting you to choose the printer. Make your choice and click on "print"
5. Exit out of the screen by clicking on the small red **X**.

Awaiting Renewal Request Processing

When a library asks for a book to be renewed it will appear in Lending in the “*Awaiting Renewal Request*” processing queue.

To Process Renewals:

1. Click on the Lending Tab, located in the middle of the screen.
2. Double click on the “*Awaiting Renewal Processing*” queue
3. Request will open
4. The current Due Date is listed on the right hand side of the **Detail** tab.
5. There are 3 choices, located in the Ribbon in the Renewals Group:
 - a. “**YES**”-Choose this option when you want to give a specific due date, such as only two weeks. Change the current due date to what you want, click SAVE, then click the “Yes” icon.
 - b. “**Yes with a Due Date**”-This will automatically give the book a renewal of 30 days. If that is okay, just click the “Yes with Due Date” icon and everything will automatically happen.
 - c. “**No**”- If you do not want to renew the book, choose, “No”.
6. Either:
 - a. Go to Alma and look up the Patron “SUHR Non-CUP” and look for the title to see if a renewal is appropriate.
 - b. Go to Alma and perform a title search of the loan title. Click on the “items” link and then click on the “Loan” link to view if a renewal is appropriate.
 - c. You can also use the History tab in the ILLiad screen to see when the transaction first appeared and count ahead to see if a renewal is appropriate.
7. Click once on the appropriate action (Yes or No) you wish to take on the Ribbon of the “Detail Tab.”
8. Screen will automatically revert back to the Lending Screen

Awaiting Conditional Request Processing

If you have a request that you wish to place a Condition on –most likely, because you want the borrowing library to specify volumes, or page numbers, etc.

1. To update a request with a “Conditional” Status go to :
 - a. Lending tab along the top menu line
 - b. Click on “*Update Stacks Search Results*”
 - c. Scan the requests barcode (TN Number)
 - d. Click on “*Conditionalize Request*”

- e. Choose a reason for the conditional: this will send the request back to the borrowing library and will await a response from them
- f. If they respond “yes” to your question, the request will be moved into the “***Awaiting Conditional Request Processing***” queue.
 - i. IF they respond “no” to request or delete the OCLC transaction the request will remain in the “Request Conditionalized” queue. You will have to repeatedly open this request to see if the OCLC status has been changed to “Record Not Found.” If it changes to this, then you need to **Route** the request to the “***Cancelled by ILL Staff***”.
2. After the library responds answering your conditional, it will appear in “***Awaiting Conditional Request Processing***”
3. Double click on this queue from the “Lending” tab located in the middle of your screen.
4. You will find the other library’s answer to your conditional in the notes field or on the OCLC record.
5. Apply the changes to the Call Number/Location fields.
6. Click on “Finished Searching”
7. The request will move to the “Awaiting Stacks Searching” queue and will be printed when you print your Pull Slips.