The Lending Request Form:
Done by ILL Staff

1. Click on the Lending Tab, located in the middle of the screen, this will bring Lending to the front.
2. You can view all of your queues in the left portion of the screen.
3. Double click on "***Awaiting Lending Request Processing***" queue
4. Double click on a transaction
5. The "***General Lending Form***" will appear
6. Perform a **Z39.50** search for **Loan** Titles and an **A-Z List** for the *Journal* Titles. You can also perform the same searches using the Library's website (Primo and A-Z List).
7. If we own the title, place the Call Number and Location in the specific fields and click ***"Finished Searching."***

Performing a Z39.50 Search:
Done by ILL Staff

1. From the Lending Request Form, click on the Z39.50 Tab
2. This should automatically perform a search for you. If it doesn't, type in the first couple words of the title in the ***Title Field*** and click the *Magnifying Glass* picture.
3. If appropriate, double click the result in the White "HOLDINGS" box located near the bottom. This will automatically transfer the Call Number and the Location to the Detail Tab.
4. Click the ***Finished Searching*** icon on the *Detail Tab,* this will move you onto the next request and move this request to the "Awaiting Stack Searching" queue.

Performing an A-Z List Search for Journals:
Done by ILL Staff

1. Double click on a waiting Article request.
2. Click on the A-Z List Tab.
3. An automatic search may be conducted in the A-Z List, if not automatic perform a search as normal.
   a. You may also want to open an internet browser and perform a journal title search using Primo. This will show print holdings. The A-Z List may not always show print holdings.
4. Go back to the "***Detail***" Tab in ILLiad and type in the location of the journal.
5. Click the "***Finished Searching***" icon when done.
6. This automatically moves request to "Awaiting Stack Searching" queue.

Printing the Requests:
Done by ILL Staff

1. Click on the Lending Tab, located along the top Menu line.
2. Click once on "***Print Stacks Search Items***"
3. Choose printer; there will be two dialogue boxes-One for Articles, One for Loans
4. You will be prompted to view the Print Dialogue box and the ability to view the Merged Document before printing. If you decide not to view the dialogue box, or the merged document, the documents will print automatically. If you decide to view these items, then the document will open in Word and you will have to print like normal and exit out like normal.
5. Print article slips on white paper, print **Lending Loan Labels** on the sticky white labels
   a. Exception: Venango requests will be printed using the ***Lending Loan Slips*** and should be printed on white paper and then scanned and e-mailed to Venango.
   b. If you have just one label, you can delete the wording on all unused labels and this will save labels. You can also copy the wording and paste into any space if you have a sheet where the label is not in the top left
   c. In the *printer properties* be sure to change the thickness of the paper under paper type to "**Thick**" and the tray location to **bypass** tray for the labels. Labels go in the bypass tray Face Down (label side down). If you have one label on the page it goes near the back of the copier—label closest to the wall.

6. This will move items into "***In Stack Searching***" queue.
7. Go to Stacks and pull items. **(Student workers will do this task)**

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Update Stacks Search Form:
STUDENT WORKERS

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1. Once you have pulled items go to the Lending Tab located along the top Menu line and click once on "***Update Stacks Search Results***."
2. Scan Transaction Number in the "Transaction Number" box.
3. Information for the transaction will appear in the middle and along the bottom of the screen.
4. Verify the Information.
5. For all items click on "***Mark Found***"
   a. If item is a loan check out in Alma to the ILLiad or Access PA patron.
   b. If the item is an article, set aside for the student workers to scan.
      i. 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.
6. If an item is not found, the student worker will give ***ILL Staff*** the slip to search. The ***ILL Staff*** will cancel any not found requests.
   a. **ILL Staff** may ***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.

Articles need to be scanned. – (***Go to Scanning / Awaiting Lending Scanning***)

Books need to be checked out in Alma and packaged.

Charge the book out to the proper account in Alma:

1. Click on "Manage Patron Services"
   a. ILLiad – 29363000385812
   b. Start typing "ILLiad" to find the ILLiad patron account
2. Check the book(s) out to the proper patron
3. Books are automatically given a 3 month due date in Alma
4. File any paperwork by title in the white filing cabinet
5. UPS labels are made for ALL books, even priority mail students.
6. All CDs, microfilm, etc should be packaged in a box
7. Anything weighing 3 and over pounds should be packaged in a box

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Scanning/Awaiting Lending Scanning:
Scanning and delivering is done by Student Workers

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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. Place the request in the second drawer down of the filing cabinet
   c. If the library <u>does not</u> have Odyssey, then the "**Send Via Article Exchange**" is the only icon that will be lit up. Click on "**Send via Article Exchange**"
   d. Place the request in the second drawer down of the filing cabinet.
   e. Click the small "**X**" once to exit out of scanning.

Finding and saving a file using a database:
Done by ILL Staff

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 resolution of the file or choose the specific layout of your paper this is under "Scan Setting"
5. Choose the name of the person you want to send the file too
6. Scan the item
7. Return to your desk, open your e-mail
8. Find the file you just sent and right click on the attachment
9. Save the file to your desktop, My Documents, etc. as the Transaction/OCLC number
10. Open ILLiad
11. Go to the Lending along the Top Menu line
12. Click on Scanning
13. Scan the Transaction Number
14. Verify Information
15. Click once on the "Import Image" icon
16. Choose the appropriate file to import and click on "open"
17. Pages will import
18. Crop as necessary
19. Click on Send Via Odyssey or Send Via Article Exchange, as appropriate
20. Click small "**X**", once, to exit out of scanning

Returning in Lending
Done by ILL Staff

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.
   b. Throw out ILLiad paper work and give the book to Circulation students to discharge.

Printing Shipping Labels:
Done by ILL Staff

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 verge 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
Done by ILL Staff

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 "ILLiad" 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
Done by ILL Staff

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 of 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.

Canceling a request
Done by ILL Staff

1. After double clicking a request in the "Awaiting Request Processing" queue and locating it using either the Z39.50 Search Tab / A-Z List Search Tab, or going to the web and using Primo/EDS/A-Z List, if you need to cancel:
2. Click on the red "***Cancel Request***" icon located in the ribbon.
3. Add the Reason for Cancelling and click "***Cancel Request***".

If You Need to ADD a Lender:
Done by ILL Staff

1. The Add a Lender screen will automatically appear after you double click on a new request
2. If there are already multiple addresses they will appear in the Top Right White box.
   - i. Sometimes you just need to verify information, do so and click "Update"
   - ii. Sometimes you need to add a new address. To do so :
       - a. Look in the bottom White box. Find the "**SHIP TO**" line. Add the address from the line in the Address Fields provided.
       - b. You can also use the Policies Directory, perform a Google Search, or use the Access PA Participant Directory to find address information.
       - c. Then click on the Green Plus sign that reads "**Add**." Click the icon that reads "Select" to select the lender. It will become active after you have clicked add.

Processing Overdues

1. Click on the Lending Tab, located along the Top Menu line
2. Locate the "*Overdues*" icon in the Ribbon
3. Click on it once
4. Choose the Overdues you wish to print, (First Overdue, Second, or Third- You can print all three at once too)***** You can also E-mail by selecting the E-mail bubble
5. Click on "Send Overdue Notice"
6. Pop-up box will appear asking to view merged documents and template. You can view them or you can click on Print to automatically print them out.
7. The Overdues need to be searched to make sure they are not on the shelf. If found, take the appropriate action of checking the book back in on ILLiad and discharging in Alma. If the item is not found you can mail/email the overdue to the borrowing library.