

**LENDING**  
**in**  
**ILLiad**  
**V7.2**

**Revised/Updated**  
**December, 2007**

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## LENDING in ILLiad

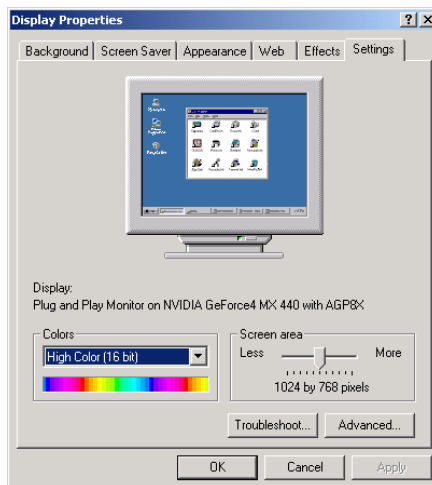
In ILLiad, Lending is the module used for lending our materials to the outside world.

- Requests come in from outside libraries
- LTS checks holdings and routes the requests to the colleges that own the items
- Colleges process the requests or route them to another college for processing

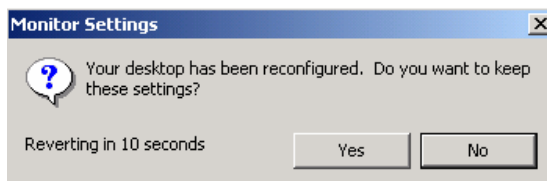
➡ In order to use ILLiad, your screen resolution must be set at 1024x768 pixels. To change the screen resolution, right-click on the desktop and select Properties from the pop-out menu.



➡ Select the Settings tab and slide the bar in the Screen area to the 1024 by 768 pixels setting.



➡ Click OK. Click OK at the windows confirmation dialog box. A second dialog box opens.



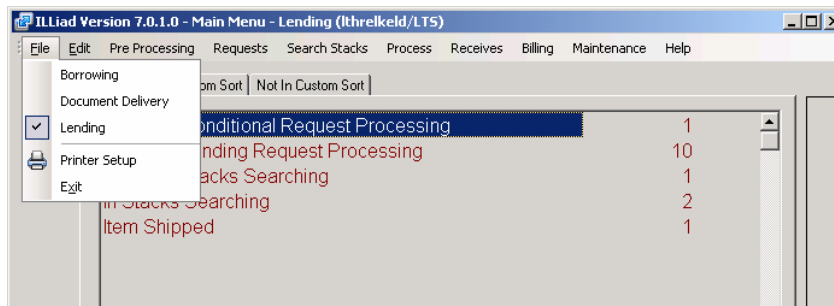
- You have 15 seconds to click Yes and the setting is complete.
- Double-click on the icon to open ILLiad. On the first login of the day (only), you get the Network password prompt. Enter the username and password that have been provided to you.



- The Client login prompt opens. Enter your username and password. If you log out of ILLiad but not out of your machine during the day, when you log back in you receive this prompt only.



- The Main Menu window opens. Verify that you are in the Lending module or change to the Lending module by clicking on File/Lending from the menu bar.

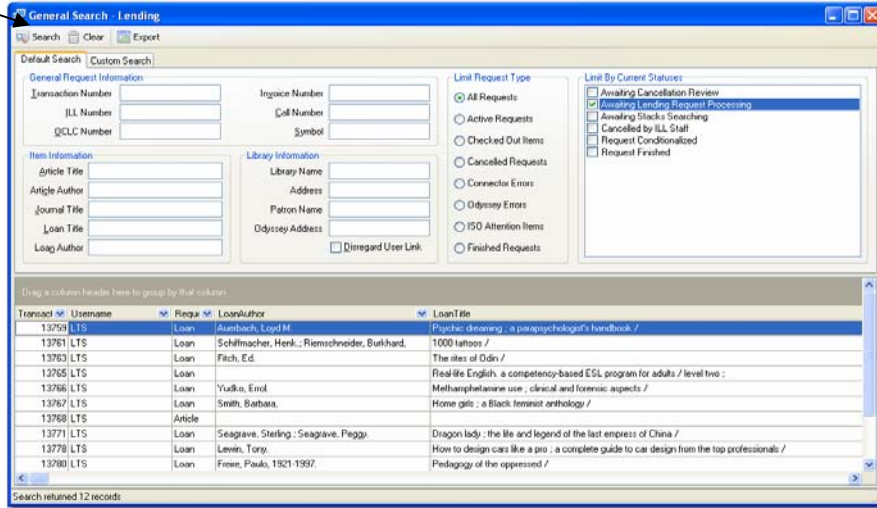


## GENERAL SEARCH FORM/EDIT REQUEST

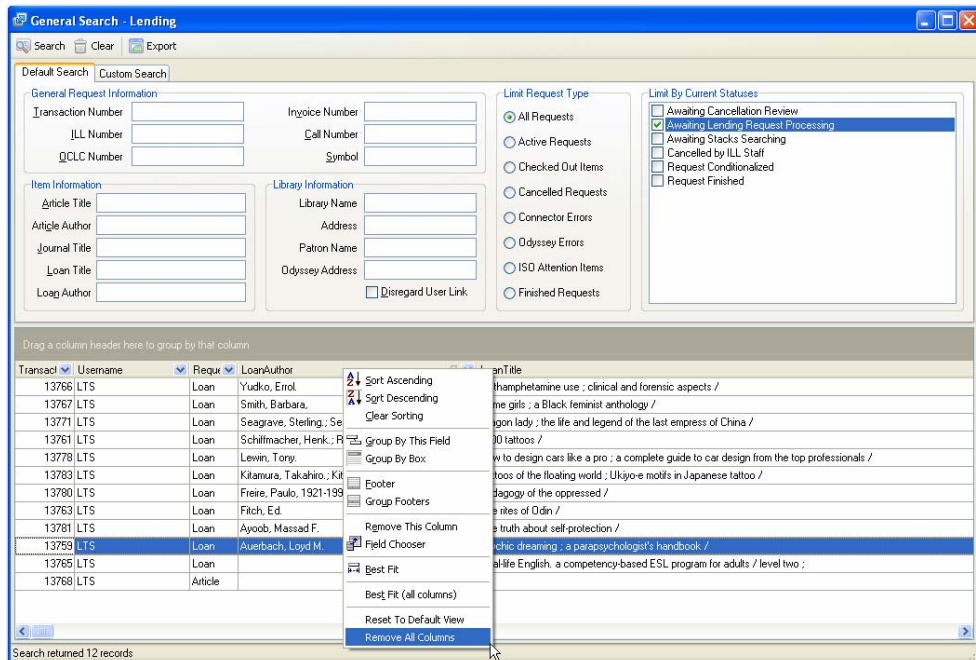
Access the General Search Form from the Main Menu under Edit/Edit Request on the menu bar.

- Select Edit/Edit Request on the menu bar of the Main Menu screen. The General Search window opens. Here you can search for ILLiad transactions by Status, Title, Transaction, ILL or OCLC number, etc.

- Enter search criteria and/or select Limits and click Search on the menu bar (or press Enter).



- If multiple records are found, a Search Requests List appears. Right-click on the header of the List to remove a column or Remove All Columns. This opens a Customization list of all possible columns and you can click and drag only those columns you want to display in the order you prefer.



- A direct search, such as Transaction number, opens the General Update Form for the transaction.
- From a Search Requests List, double-click the correct record to open the General Update Form.

## AWAITING LENDING REQUEST PROCESSING

Unprocessed/new borrowing requests are displayed in the main menu as Awaiting Lending Request Processing. LTS has searched these requests and routed them to the appropriate colleges.

- Double-click to open new requests.
  - At the Search Requests screen, double-click on a request to process it.
  - The Lending Request Form opens.
- Notice in version 7.2 the Policy Directory button and OCLC Status are more apparent. The address information has been re-designed – there is now an Add/Edit Address button linking to another form.

- ILLiad checks the lender address and if no addresses are found to match it, the Lender Address form opens. The Library Name and Address fields autofill from the request. Check the list of addresses and select the correct address.  
**OR if the address is not already in the list:**  
Click the Down arrow next to the Ship To address (in the Request section) to send the address to the Address section.  
Click the Add Address button.

The screenshot shows the 'Lender Address' form. At the top, there are fields for 'Request', 'Ship To', 'Bill To', 'Fax', and 'Library Name'. The 'Ship To' field is highlighted with a red arrow. Below the form, there is a list of addresses with a 'Select Address' button highlighted by a red arrow.

- Click the Select Address button and you are returned to the Lending Request Form.
- Note the title, call#, etc. and determine that you will or will not fill the request. To search the MCCD catalog, click the Z Search button (you should not need to do this).  
*Tip:* You will probably want to have Horizon or the HIP open in order to check availability.

- Item Not Available, Route to Another College  
Double-click in the Notes section and add a 'Not Available' note.  
Click Route on the menu bar and select the next college.



The screenshot shows the 'Lending Request Form' with the 'Notes' section highlighted. The Notes section contains a message: 'Notes (Double-Click to Add) Awaiting Lending Request Processing'. Below the Notes section, there is a 'Call Number and Location Information' section.

- To Say No  
From the menu bar, click Cancel Request.  
In the Cancellation form, select the reason for No and click the Cancel Request button.
- To Conditionalize the Request  
From the menu bar, click Conditionalize Request. The Reasons for Conditionals form opens.  
Select the reason for Conditional and click the Conditionalize Request button.
- To Fill the Request  
On the menu bar, click Finished Searching. The status of the request changes to Awaiting Stacks Searching.

- Close the Search Requests window to return to the Main menu.
- To Refresh status information (at any time), click the Refresh Status Information button on the Main Menu screen.

### **AWAITING STACKS SEARCHING**

Print the request slips for use in pulling the items from the stacks.

- From the menu bar at the Main Menu screen, select Search Stacks/Print Stacks Search Items.  
*Note:* If you wish to view/search requests in this status, double-click on the Awaiting Stacks Searching status at the Main Menu.
- The LendingLoanSlips and LendingLoanLabels docs open in MS Word.
- For both documents, click the Merge to New Document  button on the Word toolbar.  
*Note:* You may need to display the Mail Merge toolbar. From the menu bar, select View/Toolbars/Mail Merge.
- At each Merge window, click OK.
- Print the documents. Close each Word document without Saving.
- Click the Refresh Status Information button . The status has changed to *In Stacks Searching*.



### **IN STACKS SEARCHING**

After retrieving items, enter the search results.

- After searching the stacks, at the Main Menu click Search Stacks/Update Stacks Search Results on the menu bar.
- Search for specific records or click the Search button to bring up the list of all items. Double-click items in the list to update them.
- Mark Item as Found  
The screen is cleared and the status is changed to *Awaiting Shipping Label Printing*.
- Mark Item as No  
The Cancellation form opens.  
Select the reason for No and click the Cancel Request button.
- Mark Item as Conditional  
The Reasons for Conditionals form opens.  
Select the reason for Conditional and click the Conditionalize Request button.

### **AWAITING SHIPPING LABEL PRINTING**

Print shipping labels in order to ship the items to the borrowing libraries.

- At the Main Menu, click Search Stacks/Print Shipping Labels on the menu bar.
- The LendingLoanShippingLabels doc. opens in MS Word.
- Click the Merge or Merge to New Document  button on the Word toolbar. At the Merge window, click OK.
- Print the labels. Close each Word document without Saving.
- Click the Refresh Status Information  button. The status has changed to *Item Shipped*.

## **ITEM SHIPPED**

This is the status until the item is returned from the borrowing library.

- When the item is returned, at the Main Menu click on Receives/Check Items In From Returning Library on the menu bar.
- Search for a specific record or click the Search button to bring up the list of all items. Double-click items in the list to select them.
- Verify that the item is correct and click the Check Item In button.

## **For Overdue Items**

- At the Main Menu window, click on Process/Overdues on the menu bar.
- Select the notice(s) to print and click the Send Overdue Notices button. Merge, print, and close the Word Merge documents.

## **To Generate Invoices**

- At the Main Menu window, click on Billing / Search/Generate Invoices on the menu bar.

## **To Recall an Item (OCLC Requests only)**

- Double-click to open the request (must be in Shipped status) in the General Update form.
- On the menu bar, select Process/Recall Request on OCLC.
- Close the form. The borrowing institution will get a recall request through OCLC.

## **To Process Renewal Requests**

- Requests from a borrowing institution to renew an item will appear in the Main Menu as Awaiting Renewal Request Processing.
  - Double-click to open the request(s) in the Lending Request Form.
  - Click on Process/Renewals on the menu bar.
  - Select:
    - Respond No** – keeps due date and denies renewal request
    - Respond Yes with a Due Date of** – renews item with a preset due date (currently 2 weeks). If you want to enter a due date other than the preset date, select Respond Yes.
    - Respond Yes** – renews item BUT does not change the due date
- Note:* Be sure to manually change the due date before Responding Yes.

## **To Respond to Conditional Response(s)**

- Replies to your Conditionals from a borrowing institution will appear in the Main Menu as Awaiting Conditional Request Processing.
- Double-click to open the request(s) in the Lending Request Form.
- The OCLC information will appear in the box in the top right corner of the form.
- Determine if you will fill or not.
  - For No: Select Cancel Request on the menu bar, select the reason and click the Cancel Request button.
  - For Yes: Click Finished Searching on the menu bar. The status changes to Awaiting Stacks Searching.

## ADD A LENDING REQUEST FOR A NON-OCCLC BORROWER

We are not using the Lending web page, but you can add a Lending request for a non-OCCLC borrower. You may need to first create a Borrower symbol for the requesting institution.

- ➔ To create a Borrower symbol, at the Main Menu screen go to Maintenance/Edit Addresses on the menu bar and fill in General, Shipping and Billing information.
- ➔ Click the Add Address  button and click the Close box to close the window.

- ➔ At the Main Menu screen, go to Requests/Add request on the Menu bar. The Add Request screen opens.
- ➔ Enter request information in the appropriate fields.

- ➔ In the System Information section, add the Borrower symbol for the requesting institution.
- ➔ On the menu bar, click Finished Adding Request.

## PRINT PROBLEMS while LENDING in ILLiad/ADDRESS CORRECTIONS

Before filling requests for items with the status of Awaiting Lending Request Processing, it is very important to verify the Library Address in the Borrower Information section of the Lending Request form. Failure to do so causes print problems when attempting to print stacks searching slips, shipping labels, etc.

The screenshot shows the 'Lending Request Form' interface. Key sections include:

- General Request Information:** Transaction Number (10785), ILL Number (31429609), OCLC Number (82342194), Patron/In Process (Brown, Carolyn JN), ISSN (9781930513359), Lending String (UNB.FND;FMD.DUP.LDS), Service Level/Type (Regular), Shipping Options (Mail).
- Loan Information:** Author (Libman, Howard; Makadon, Harvey J.), Title (HIV /), Edition, Publisher (Philadelphia : American College of Physicians, 200), Place, Date.
- Article Information:** Journal Title, Volume, Issue, Month/Year, Pages, Article Author, Article Title, Inquest.
- Call Number and Location Information:** Call Number (RC606.G3.H55.2003), Location (Mesa CC Library Available), Item No/Due Date (7/29/2007), Places (1).
- Notes:** A list of notes including 'Awaiting Lending Request Processing', 'mcc only', and 'Borrowing Notes: LVIS, BCR Reciprocal Agreement, B/AM-BCR. Please include copy of request with material. Copyright clearance for...'
- Address Section:** ShipTo: Alaska State Library-ILL / P.O. Box 110571 / Juneau AK 99811-0... Add/Edit Address button.

### To Fill the Request

- In the OCLC Information area (above the Notes field), use the scroll bar to scroll across through the ShipTo information (sometimes the borrowing library will include 'Check ShipTo Address' in the Borrowing Notes).
- Verify that the ShipTo address is the same as the Address displayed in the Address area (lower right corner).
- If the ShipTo address is different, click the Add/Edit Address button to open the Lender Address form.

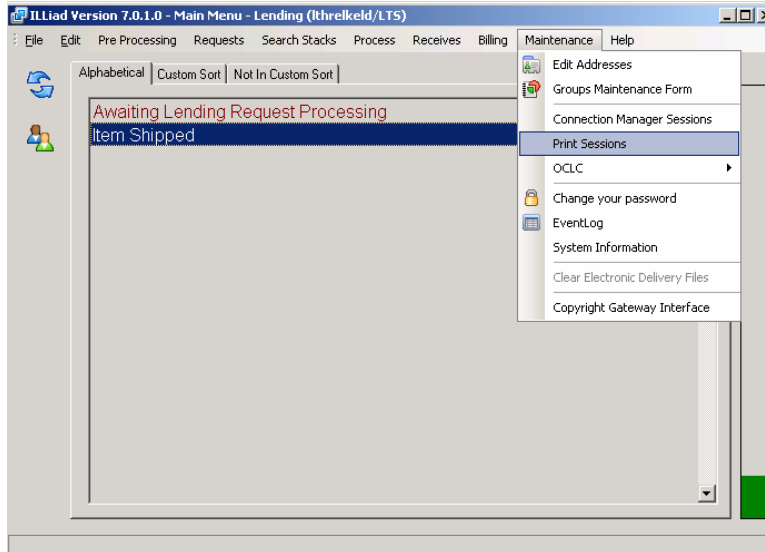
### Address Adds, Edits, Deletes

- For requests from libraries with multiple addresses, be sure to select the appropriate address in the list to select it as the Ship To address.  
**OR**  
Edit the address and click the AddAddress button to add it and the Select Address button to select it.
- To delete an address, go to the Main Menu screen and select Maintenance/Edit Addresses on the menu bar.  
Do a search for the library, select the address to be deleted, and click the Delete Address button.

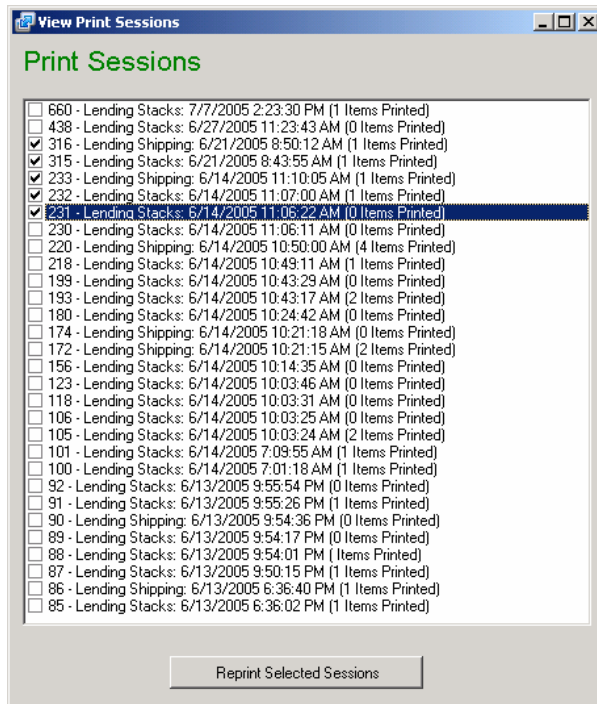
## RE-PRINTING PRINT JOBS in ILLiad

To re-print items in ILLiad:

- At the Main Menu, select Maintenance/Print Sessions from the menu bar.

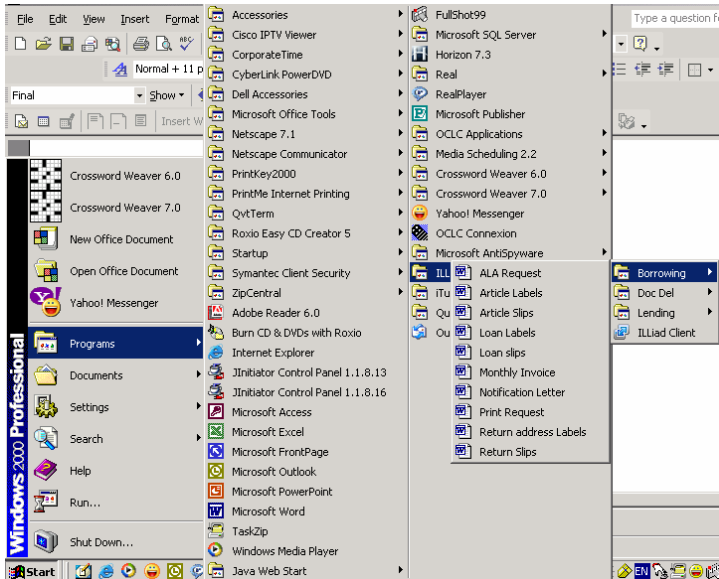


- The View Print Sessions window opens. Select the job(s) you want to reprint and click the Reprint Selected Sessions button.



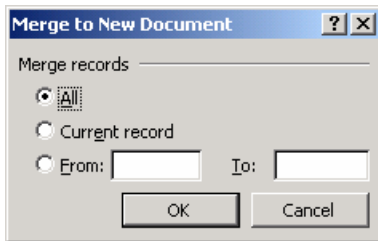
- Close the View Print Sessions window.

- Click the Windows Start button. Select Programs/Illiad.



- Place the cursor over the appropriate option: Borrowing or Lending. Click on the document you wish to reprint.

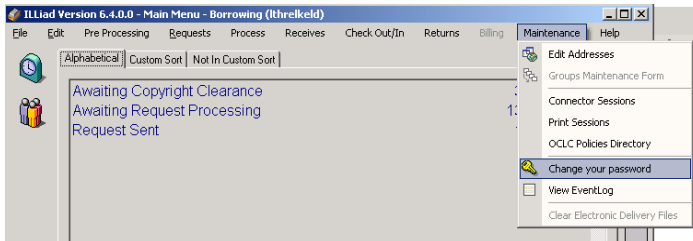
- The document opens in MS Word. On the toolbar, click the Merge to New Document button



- Click OK at the Merge to New Document window and the document opens.

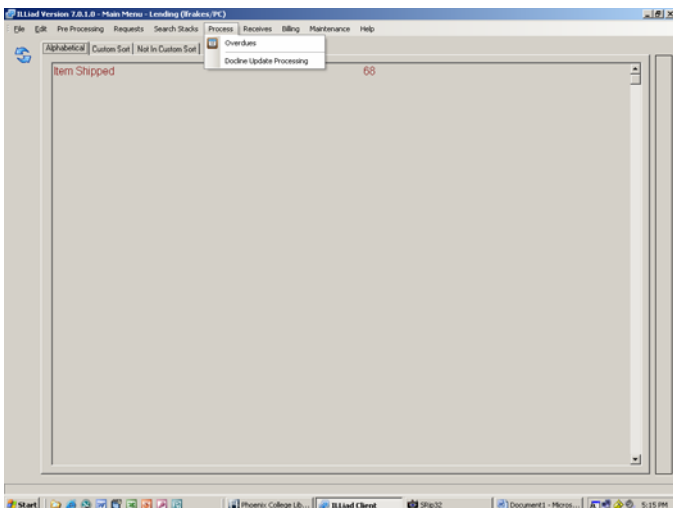
## CHANGE PASSWORD

- At the Main Menu screen go to Maintenance/Change your password on the Menu bar.
- At the Change Password window, enter password information and click OK.

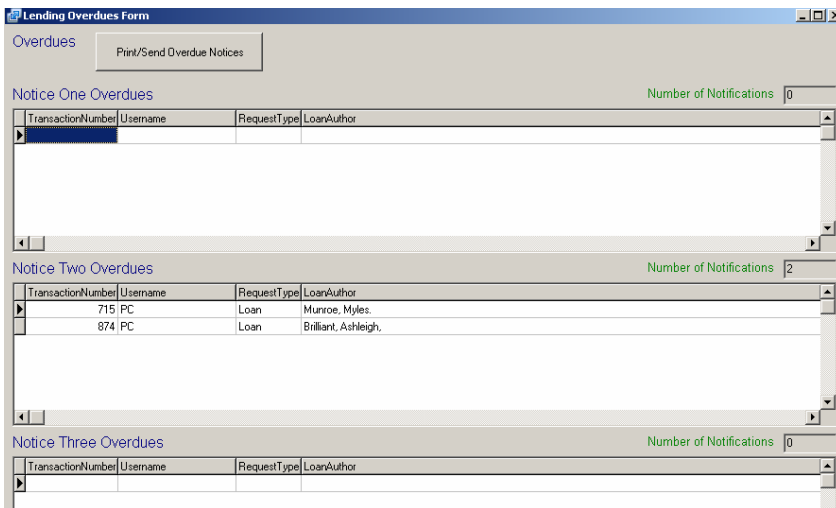


**APPENDIX I**  
**ILLiad Lending Overdues**  
(L. Frakes 9/22/05)

Click Process, Overdues at the Main Menu screen.



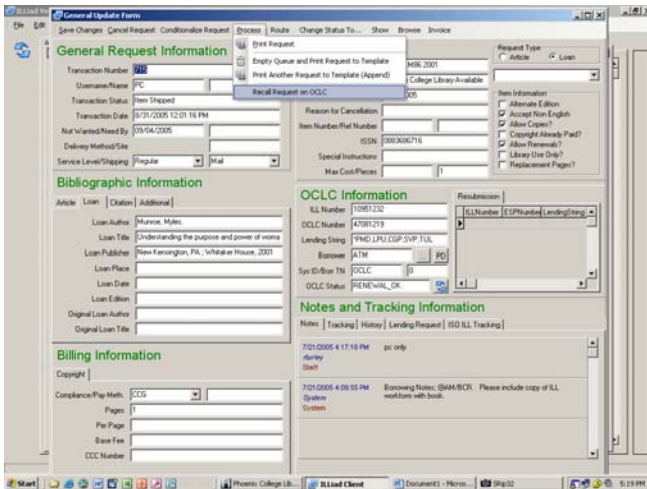
Double click the item to view



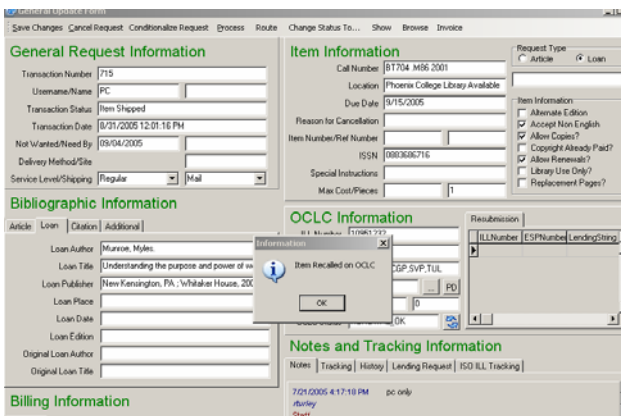
If the OCLC status is RETURNED, leave as is and await returned material.

If the OCLC status is something other (i.e. Shipped, Received, Renewal OK), click Process/Recall Request on OCLC. (In this example the request had been renewed, but the renewal was now overdue).

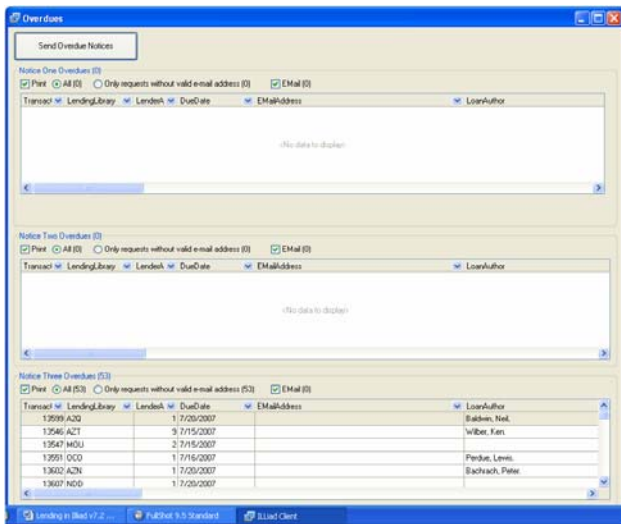
Recalling an item notifies the borrowing library that they need to return the material to the lending library.



The Information window appears with Item Recalled on OCLC, click OK. Close the window to return to the Overdues Form.

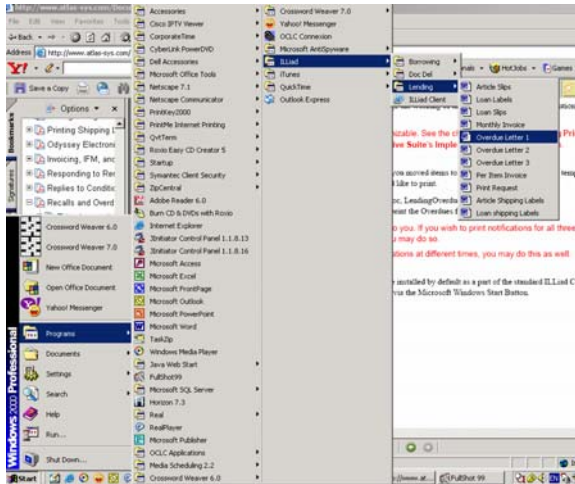



If the Send Overdue Notices button is clicked, the Information window appears stating that the Overdue Information Sent/Moved to Print Queues and E-Mailed. Click OK.



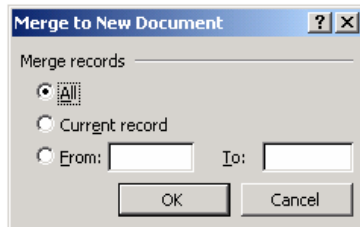
Close the Overdues Form.

Click the Windows Start button, find ILLiad (probably under Programs), select Lending, click the appropriate Overdue Letter.

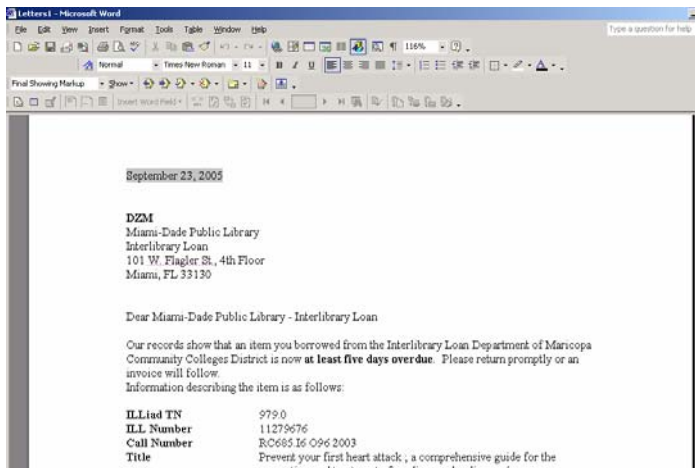


MS Word opens to the Overdue Letter template. On the toolbar, click the Merge to New Document button .

The Merge to New Document window opens. Click OK.



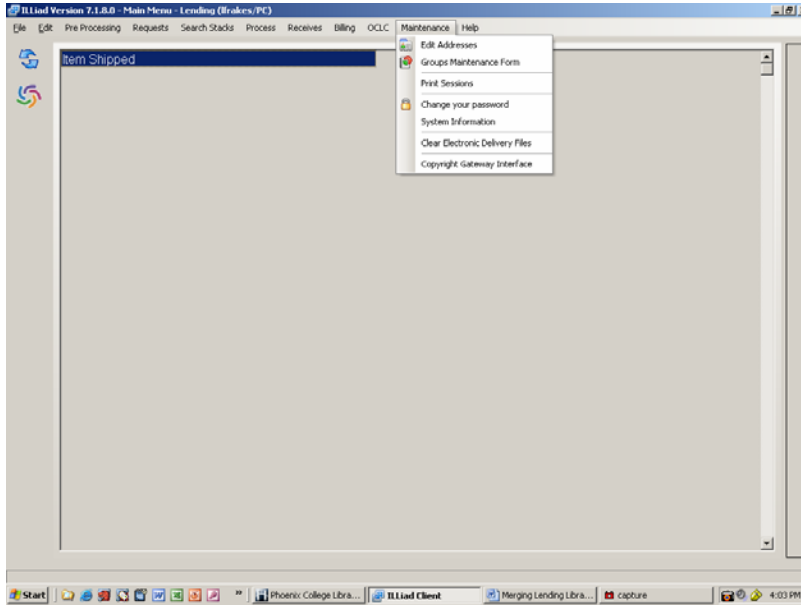
The merged Overdue Letter opens in Word.



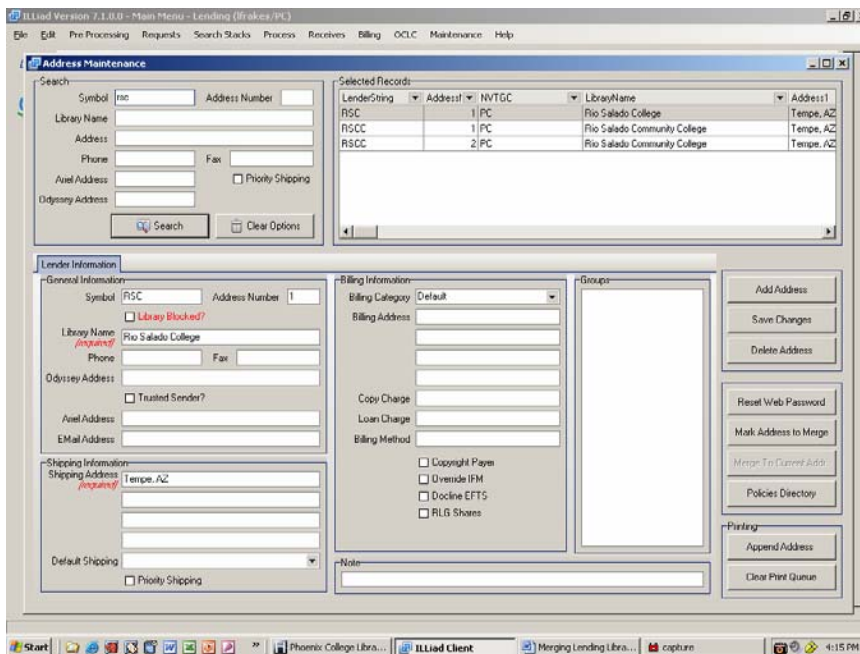
## APPENDIX II

### Merge Lending Library Addresses (L.Frakes 9/28/2006)

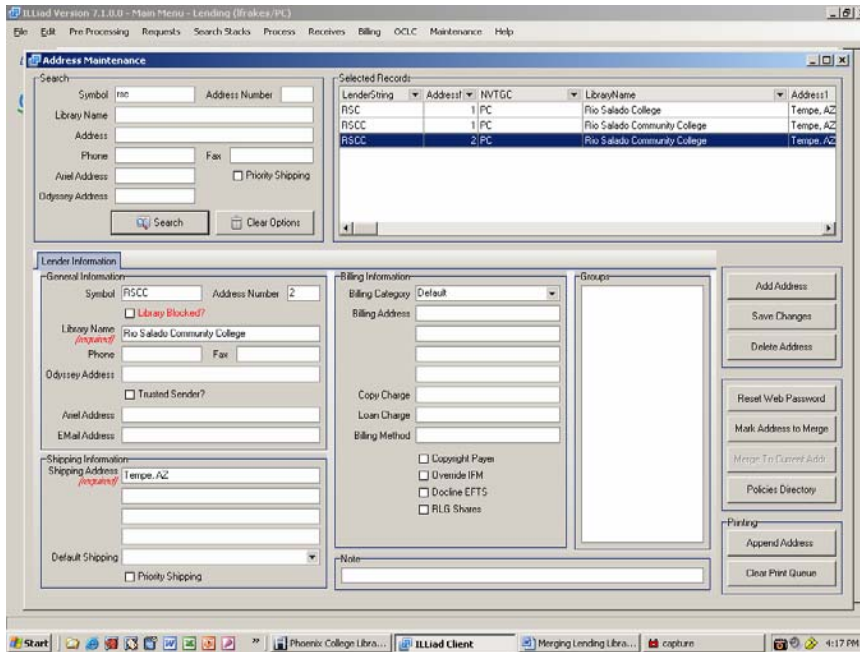
At Main menu, click Maintenance/Edit Addresses.



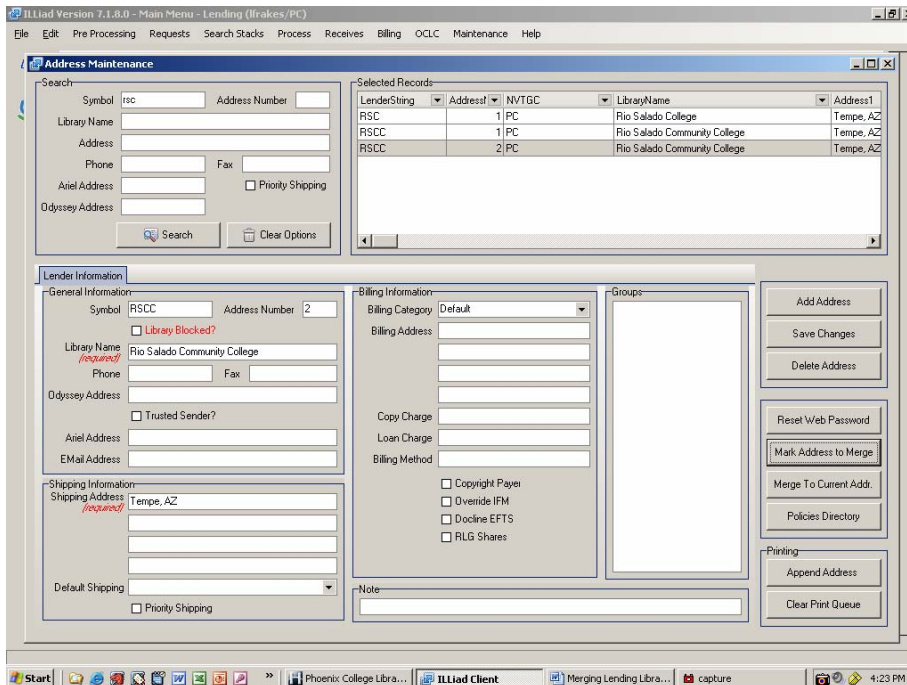
Enter library symbol in the Search box, press Enter or click Search button.  
*(in this example the symbol is NOT the OCLC symbol, but a Local MCCD symbol)*  
The 'Selected Records' are displayed to the right.



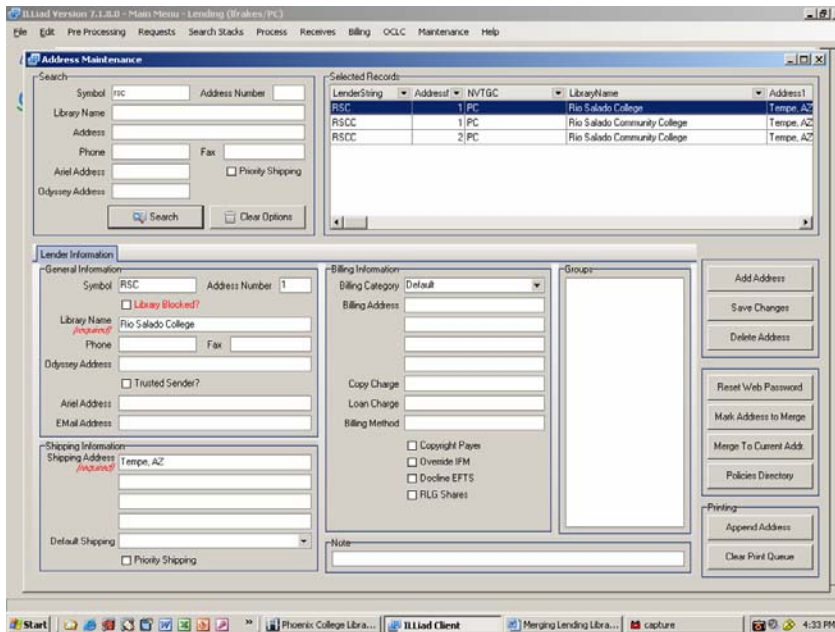
Double click on specific selected record to be merged.  
 Click 'Mark Address to Merge' button (*merge RSCC2*).



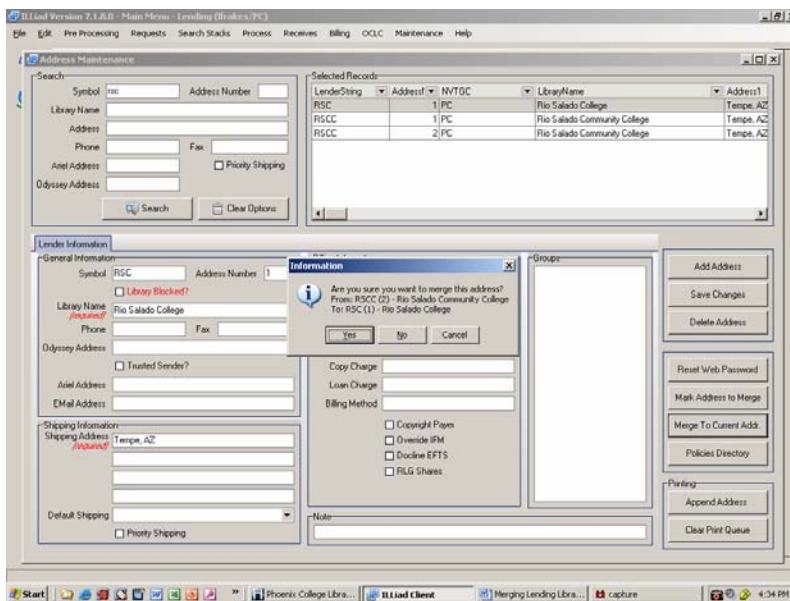
The 'Merge to Current Addr' button, previously gray, is now active.



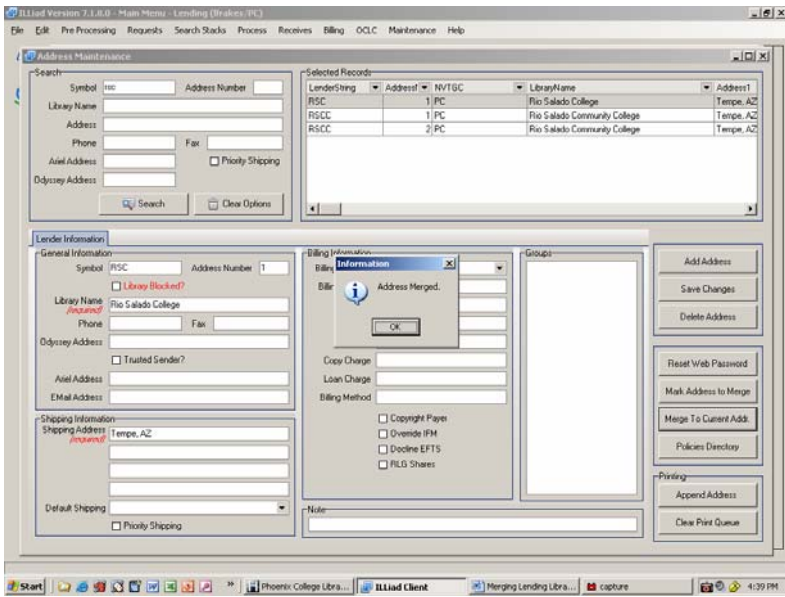
Double click on the specific address to be merged to (RSC)



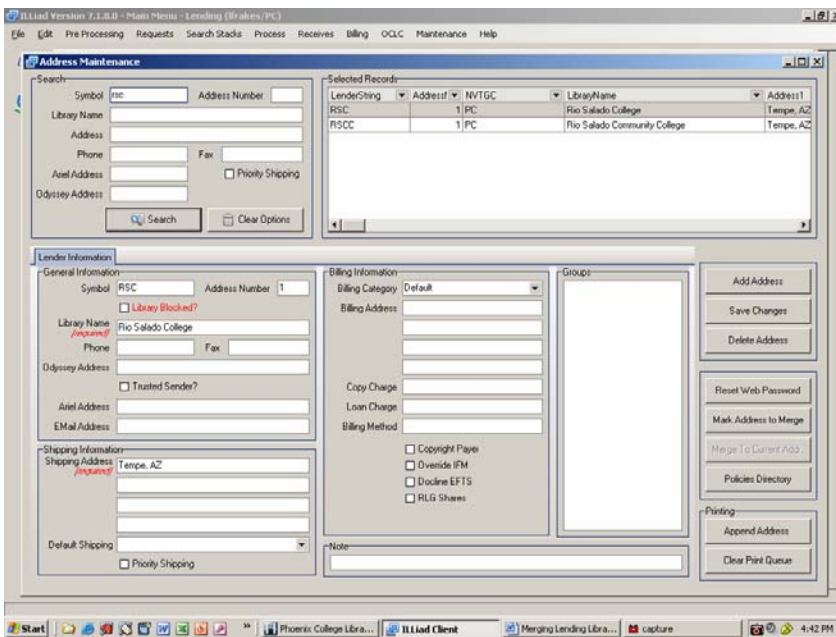
The Information window displays (“Are you sure you want to merge this address? From: RSCC(2)... To: RSC(1). If correct, click Yes.



Address is merged.

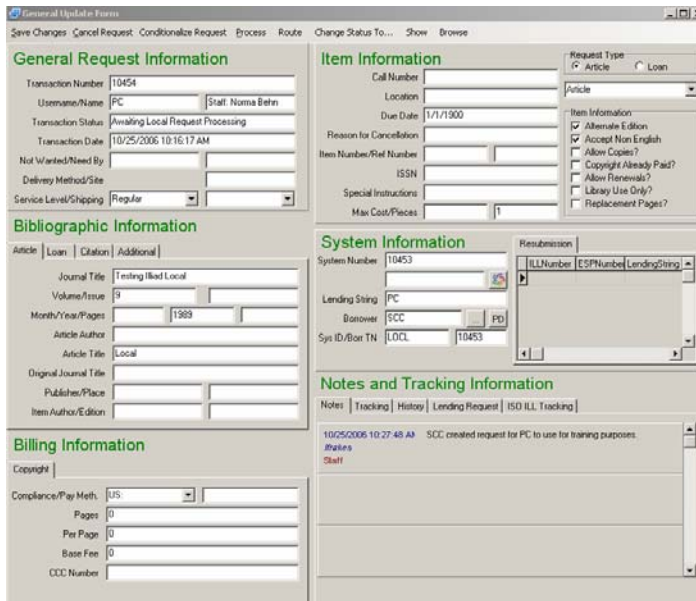
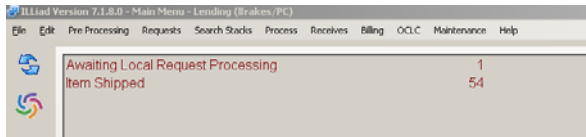


Correction will appear after exiting Address Maintenance.

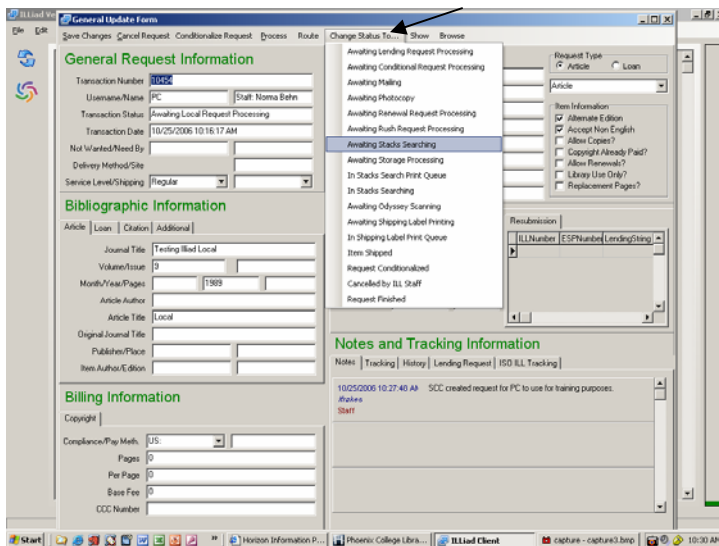


**APPENDIX III**  
**Local Article Requests**  
L.Frakes 10/25/2006

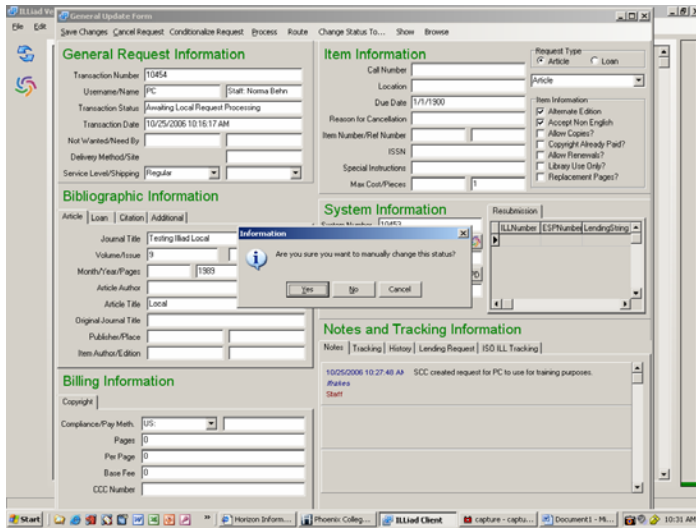
**To Supply an article to another MCCD library:**  
Open 'Awaiting Local Request Processing'



Click 'Change Status To' and click 'Awaiting Stacks Searching'



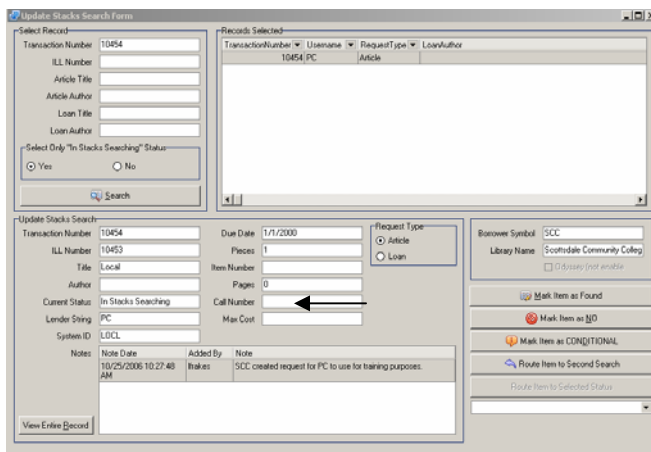
Save changes. Click Yes to message “Are you sure you want to manually change the status?”



### Print Stacks Search Items



Follow regular stacks search procedures.  
Update Stacks Search Results. Make appropriate changes to Pages.



Print shipping labels.