

Lending Instructions for ILLiad 8.0

1 – Open ILLiad Client.

2 – Click on Lending (red down-arrow icon) in Main.

3 – Click on Awaiting Lending Request Processing; this brings up a list of the requests in a grid format. These do not have to be processed in order.

4 – Click on a request in the list. This step will open up another window. If you need to close the request without having searched it, simply click in the X in the upper right hand corner.

5 – Note the various elements of the request. They're all important, but some are circled below:

The screenshot shows the ILLiad 8.0 interface for a lending request. The window title is "311085 - Lending Request". The interface is divided into several sections:

- Toolbar:** Contains various action buttons such as "Cancel Request", "Conditionalize Request", "Finished Searching", "Yes", "Yes With Due Date", "No", "Route", "Policies Directory", "Resend Request", "Billing", "View", "Send E-Mail", "Print Request", "Add to Print Queue", "Print and Empty Queue", "Pending Updates", and "System".
- General Request Information:** Fields include Transaction Number (311085), Username (Lending), Transaction Date (2/17/2011 6:07 PM), Delivery Method, Service Level (Regular), and Billing Account. The "Service Type" is set to "Article".
- OCLC Information:** Fields include ILL Number (74257155), OCLC Number (5758425), Lending String (ILL,*KSU,CSL,OKU,BNG), Borrower (UBY 1), System ID (OCLC 1504369), and OCLC Status (IN_PROCESS).
- Item Information:** Fields include Call Number, Location, Due Date, Reason For Cancellation, Item Num/Ref Num, ISxN, Special Instructions, and Max Cost/Pieces (3SIFM).
- History Table:** A table with columns "Date", "Note", "Type", and "Added By". It contains two entries for the date 2/17/2011 6:07 PM.

Date	Note	Type	Added By
2/17/2011 6:07 PM	Borrowing Notes; WE BELONG TO SHARES 51-0724 BCR/AMIGOS Code Signer. ARIEL Address; provoariel.lib.byu.edu Client Code ACF17E	System	System
2/17/2011 6:07 PM	Billing Notes; LMI Account Number #D9522701. ISI ACCT; File #0016890 (**ISI SHIP VIA FEDERAL EXPRESS**)	System	System

- 6 – Search the catalog or InfoTrack, etc. copying and pasting necessary location information in the Call Number and Location fields.
- 7 – Click on Finished Searching.
- 8 – If you know you cannot supply a request, click on No.
- 9 – Repeat until you're finished with the list.
- 10 – Go back to Main/Lending and hit the refresh button. The requests will go into the awaiting printing status.
- 11 – To print pull slips, from the Main Page, Lending ribbon, Search Stacks group, click the top half of the Print Stacks Search Items button. To print only articles, choose Print Stacks Search Articles from the dropdown menu. To print only loans, choose Print Stacks Search Loans from the dropdown menu. If this is the first time you have printed these documents, or if you have chosen in Print Configurations to be prompted with the to view and edit your Lending Loan Labels, for example, the popup window ILLiad Printer Settings (LendingLoanLabels.doc) will appear.
- 12 – Send the document to the printer; then pull items from Depository storage.
- 13 – When you return from pulling the items, click Update Stacks Search.
- 14 – Sort requests according to which will be scanned vs. which will be shipped.
- 15 – Scan in Odyssey.