



User Guide

ILLiad Borrowing Processing



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Borrowing Overview

ILLiad Borrowing processing is the process in which a patron requests an article or a physical item for a loan that your institution does not have in their holdings or is not currently available. As a result, the item has to be borrowed from another institution to fulfill the request.

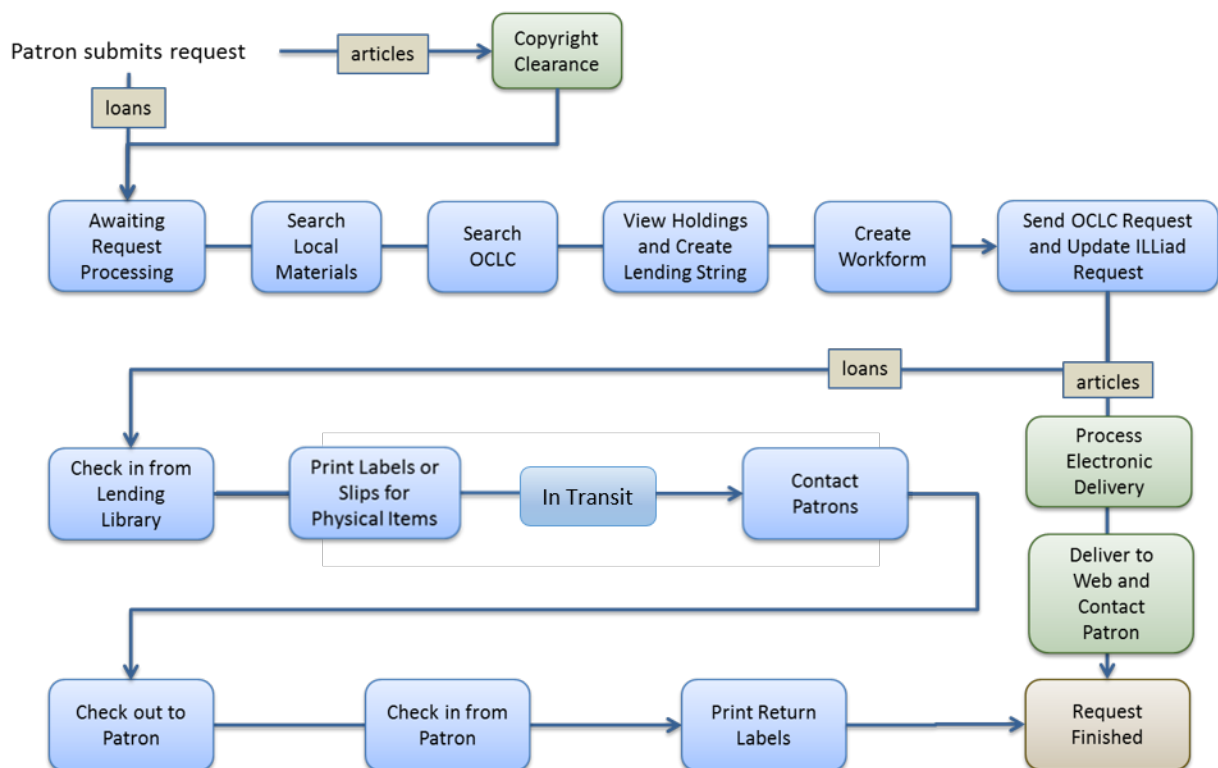
There are two different types of borrowing request:

Loan Requests-

- Patron requests a physical item
- Sent directly to the **Awaiting Request Processing** queue.

Article Requests-

- Patron requests an article or other item that can be delivered electronically.
- Sent to the **Awaiting Copyright Clearance** queue. Article requests will route to Awaiting Request Processing after copyright clearance processing.



Awaiting Copyright Clearance- Article Request Only

Even though copyright clearance is technically a separate process from borrowing processing, staff must first verify copyright permissions before they can begin the borrowing process. ILLiad tracks copyright permissions through the Copyright Clearance Center (CCC), provides alternative copyright processing options (outside of the CCC), monitors your requests for journal articles in order to maintain compliance with the copyright guidelines for Fair Use (otherwise known as the “Rule of Five”), and allows you to process copyright royalty payments directly in ILLiad.

1) Information Display

Note: Please review your institutional guidelines for copyright compliance. ILLiad only provides the tools for monitoring copyright compliance; how you process requests for copyright and submit usage reports to the CCC is dependent on your local policies.

To view the informational display on borrowing requests that are ready for copyright processing, please see the steps below:

1. On the Borrowing Ribbon, Click the **Process Copyright** button or double click the **Awaiting Copyright Clearance** queue in the Borrowing system group.
2. See the informational display image below for a breakdown of the information used to help make copyright decisions for each request.
3. Once you have reviewed the information, proceed to the next section on Processing Options.

2) Processing Options

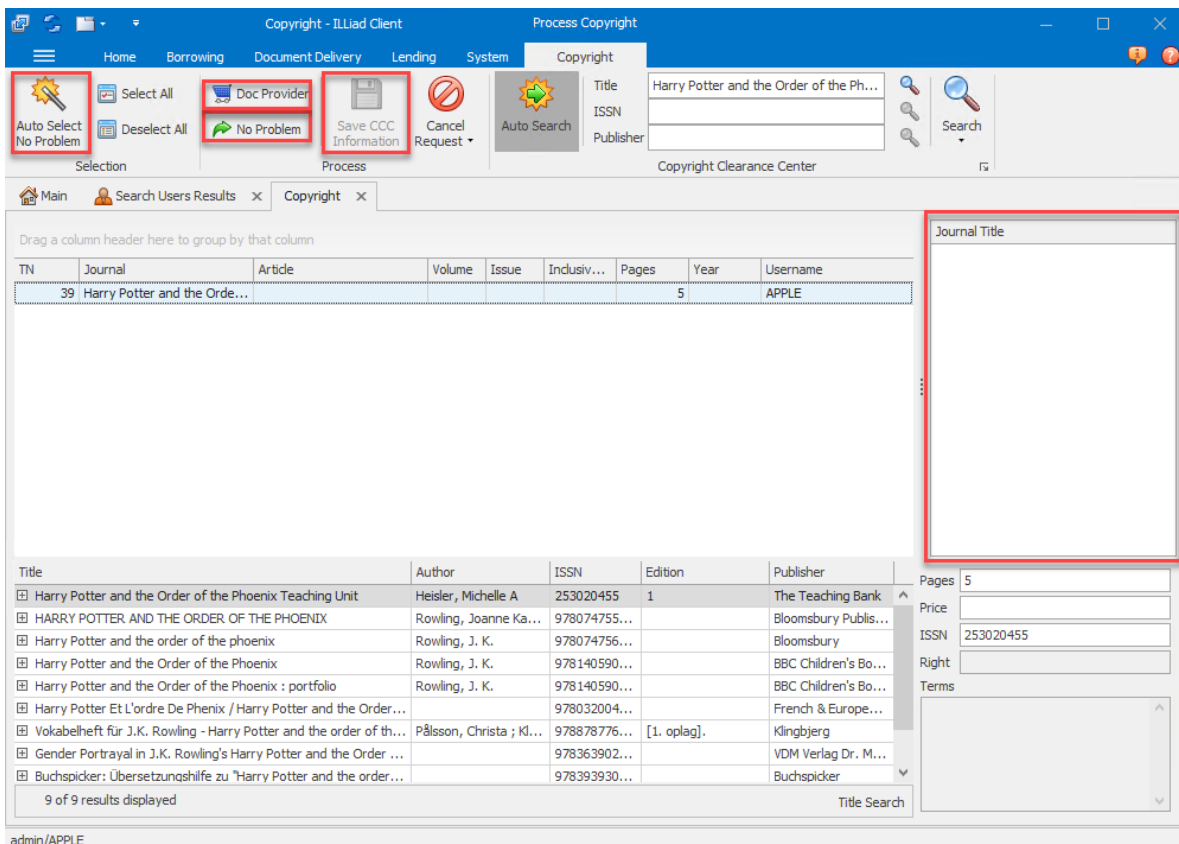
The various processing options depend on many factors such as if the article requires royalty costs and if the royalty costs are higher than your maximum cost. There are four different ways to handle copyright processing. It is recommended to the first move all item requests older than 5 years to the Awaiting Processing queue by clicking the **AutoSelect No Problem** button, then process the remaining requests based upon their copyright clearance.

1. In the lower part of the copyright processing window, the rights information from the CCC will provide one of the three copyright permissions for the article(s):
 - **Granted**
 - **Denied**
 - **Contact Rightsholder Directly**

If the right is granted, it will also include the royalty cost to obtain the item through ILL. Note that the royalty fee listed is not static and may change before you submit your copyright report to the CCC.

2. There are four different ways to process the request in the grid-
 - Journal requests older than five years:
 - Click the **AutoSelect No Problem** button. This will highlight all the requests.
 - To process these requests, click the **No Problem** button. All requests older than 5 years will be move from this list to the **Awaiting Request Processing** queue.
 - Requests newer than five years that fall under the fair use guidelines:

- Check the remaining results against the **Journal Titles** on the right.
- If one or more of the results in the list don't appear on the right, they fall under the fair use guidelines and are sent to the Awaiting Request Processing queue by selecting the record and then clicking the **No Problem** button.
- Requests that require a royalty fee:
 - For those requests where the title does show up in the right-hand column, click the **Save CCC Information** button.
 - This processing option will copy and save the copyright royalty information to the ILLiad request, add it to your list for potential CCC payment, and update the request to Awaiting Request Processing.
 - The Save CCC Information option will only save the information from the CCC to the ILLiad request, it will not send information to the CCC at this point. If you receive this item, the saved copyright information will be included in the report that you then send to the CCC in a separate process.
- Alternative processes for requests with a high royalty fee:
 - For those items which present high royalty fees, you have a couple of other processing options here.
 - The **Doc Provider** button to route the request to the **Awaiting Doc Provider Processing** queue. This allows you to manage them outside a traditional ILL request. This option is ideal for articles you wish to obtain from the document provider (e.g., the British Library) or directly from the publisher at a reduced cost. Note: Copyright information will not be saved using this option.
 - Alternatively, you can cancel the request and let the patron know that you cannot provide the item due to copyright issues.



Copyright - ILLiad Client

Process Copyright

Home Borrowing Document Delivery Lending System Copyright

Auto Select No Problem Select All Deselect All Doc Provider No Problem Save CCC Information Cancel Request Auto Search

Selection Process Copyright Clearance Center

Main Search Users Results x Copyright x

Drag a column header here to group by that column

TN	Journal	Article	Volume	Issue	Inclusiv...	Pages	Year	Username
39	Harry Potter and the Orde...					5		APPLE

Journal Title

Title	Author	ISSN	Edition	Publisher	Pages	Price	ISSN	Right	Terms
Harry Potter and the Order of the Phoenix Teaching Unit	Heisler, Michelle A	253020455	1	The Teaching Bank	5				
HARRY POTTER AND THE ORDER OF THE PHOENIX	Rowling, Joanne Ka...	978074755...		Bloomsbury Publis...					
Harry Potter and the order of the phoenix	Rowling, J. K.	978074756...		Bloomsbury					
Harry Potter and the Order of the Phoenix	Rowling, J. K.	978140590...		BBC Children's Bo...			253020455		
Harry Potter and the Order of the Phoenix : portfolio	Rowling, J. K.	978140590...		BBC Children's Bo...					
Harry Potter Et L'ordre De Phenix / Harry Potter and the Order...		978032004...		French & Europe...					
Vokabelheft für J.K. Rowling - Harry Potter and the order of th...	Pålsson, Christa ; Kl...	978878776...	[1. oplag].	Klingbjerg					
Gender Portrayal in J.K. Rowling's Harry Potter and the Order ...		978363902...		VDM Verlag Dr. M...					
Buchspicker: Übersetzungshilfe zu "Harry Potter and the order...		978393930...		Buchspicker					

9 of 9 results displayed

admin/APPLE

Please note: While you do not need a CCC account to view royalty costs, you will need to have an account to submit your usage reports for invoicing. For more information on submitting your copyright report, see [Submitting Copyright Orders](#).

For more information on processing copyright, please see the [Copyright](#) section of Atlas' support documentation.

Searching

Before you create and send the OCLC request for borrowing, verify you don't already have the requested item by searching your local collections. Sometimes patrons may request an item that your institution already owns and is currently available. Checking your own holdings first will prevent extra work. If you don't have the request within your own holdings, proceed to searching the item in OCLC to obtain the bibliographical information for the borrowing request.

3) Searching Local Holdings

1. Open a request to process.
2. From the Borrowing tab, double-click the **Awaiting Request Processing** queue.
3. The ILLiad request form will open. The following processes are completed on the ILLiad request form.

The process for searching your own collections is identical to the process used to verify availability on a lending request. This can be accomplished through one of the following:

- Searching your local OPAC with Z39.50
- Using a vendor-specific Addon to search a unified discovery service
 - An addon is a widget that you can install in your ILLiad client to search an outside source within the ILLiad request form. For a complete list of available addons, see the [Addons Directory](#).
- Search your catalog in a browser (e.g., IE or Chrome)

To search Z39.50, please follow the steps below:

1. From the main request form, click on the **Z39.50** tab.
 - Information from the request form will automatically be filled into the search fields.
2. Click on the **magnifying glass** next to any of the fields to start the search.
 - Results from your OPAC will appear in the grid.
3. If the record is currently available, import the record and call number into the ILLiad request by selecting the record and clicking the **Copy Info** button on the Discovery ribbon.

For a step by step guide performing advanced searches of your local holdings through Z39.50, see [Searching Local Holdings](#).

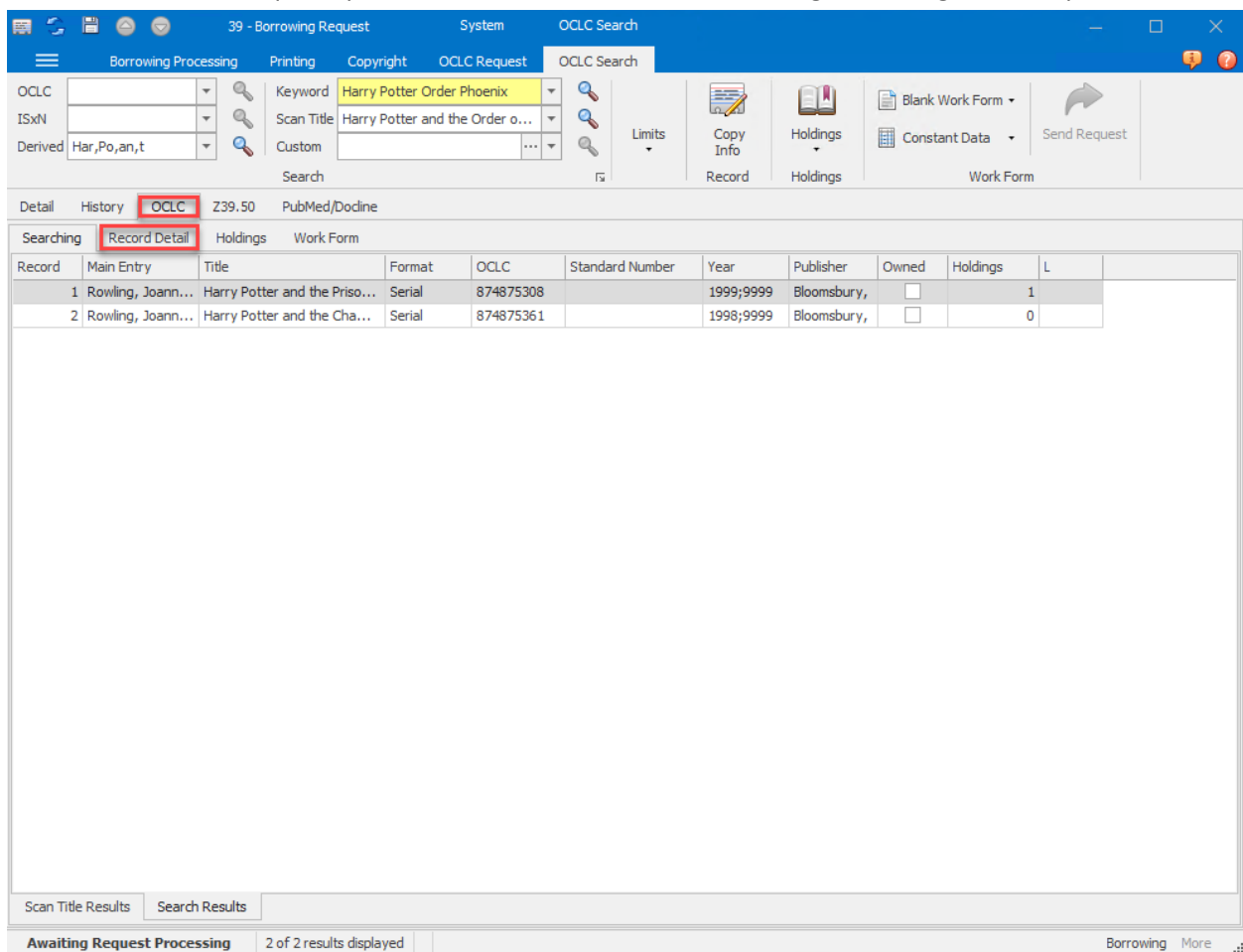
If you don't already have Z39.50 set up, see [OPAC and Z39.50](#) for instructions on connecting your local OPAC with ILLiad.

4) Searching OCLC

If your institution doesn't have the requested record, you will need to search for the item in OCLC's WorldCat to select the record for an Interlibrary Loan (ILL) request.

1. To access WorldCat, click the **OCLC** tab in the process tab section.

- A new tabbed work form will open up with the results of the WorldCat search based on the information in the ILLiad request.
 - The searching ribbon in the client will display default search values based on the ILLiad request.
 - Search results will be displayed in the center grid portion of the screen with brief citation information. Just like WSILL, ILLiad attempts to highlight the best title with the most holding libraries at the top of the list.
 - If your search returns no results, be sure to check the number of results displayed at the bottom of the client. If there are result yet none are being displayed, you may need to change your search values on the ribbon to include additional resource **Types** such as CDs or internet resources.
 - If you wish to view more information about a record, you can click the **Record Detail** tab which will display the WorldCat MARC record for the title that is selected.
2. *Optional- To create a new search, change one or more of the default search options on the searching ribbon (e.g., OCLC, Type, Keyword). Once you have chosen a new search option, click the magnifying glass to send the search again.
 3. Select the record that best fits your ILL request.
 4. To send the request, please read the next section on Creating & Sending OCLC Requests.



The screenshot shows the OCLC Search interface with the following details:

- Search Criteria:** Keyword: Harry Potter Order Phoenix; Scan Title: Harry Potter and the Order o...; Derived: Har,Po,an,t
- Search Results Table:**

Record	Main Entry	Title	Format	OCLC	Standard Number	Year	Publisher	Owned	Holdings	L
1	Rowling, Joann...	Harry Potter and the Priso...	Serial	874875308		1999;9999	Bloomsbury,	<input type="checkbox"/>	1	
2	Rowling, Joann...	Harry Potter and the Cha...	Serial	874875361		1998;9999	Bloomsbury,	<input type="checkbox"/>	0	
- Navigation:** OCLC, Record Detail, Holdings, Work Form
- Status:** Awaiting Request Processing, 2 of 2 results displayed

For more information on WorldCat searches such as limiting search results, default search types, custom searches, etc., see [Searching OCLC](#).

Creating & Sending OCLC Requests

At this point, you should have found and selected the record in WorldCat. Next, you will be creating a request from this record, viewing holdings information, creating a lending string, creating a work form, and then sending the OCLC request.

5) Viewing Holdings Information

The two ways of viewing holdings:

Using the top-half of the Holdings Button-

1. Click the *top half* of the **Holdings** button in the OCLC ribbon on the request form.

Default custom holdings path needs to be configured in the Customization Manager for the **top half** holdings button to work. If you receive an error message when clicking this button, the **View Alternate Holdings** section below will provide the next steps for your processing.

Loans	Articles
Holdings tab will open with a list of holding libraries, grouped by custom holdings group for loans.	Holdings tab will display the holding library symbol and local holdings information on issues and dates owned, if available in WorldCat.

Using the bottom-half of the Holding Button-

2. **View Alternate Holdings-** View other holdings groups outside your custom holdings path such as state and regional holdings.
 - i. Click the *lower half* of the **Holdings** button.
 - ii. Select the group you would like to view from the list (e.g., Regional, State, All, or the Default group of holding libraries).
 - iii. Libraries in that group that hold the item will display on the left column in the **Holdings** tab.

6) View Policy Information

1. On the **Holdings** tab, roll over the symbol in the display to view more details (e.g., the library's name, Policies Directory information on fees, days to respond, etc.).
 - The library name will be displayed at the bottom of the form.
2. For more information on the library's ILL policies, right-click on a symbol.
3. Select the **Policies Directory** option.
 - The **Policies Directory** will open to the library's record. View the detailed policy information.

For more details on viewing holdings, see [Viewing Holdings Information](#).

7) Selecting Lenders

To select lenders for your request, you will need to create the lending string. A lending string can have up to 15 libraries. If the first library is unable to fulfill your request, then the request will proceed to the next library and so on until a lending library fills the request.

Creating the Lending String

- Automated-
 - Click the *top half* of the **Holdings** button to use your default custom holdings. ILLiad will automatically generate a lending string based on the libraries in the custom holdings path.
 - In order for this operation to work, your default custom holdings path needs to be configured in WSILL and also set in the Customization Manager. For a complete listing of instructions, see [Creating and Editing the Work Form](#).
- Manually-
 1. Double click on a lender symbol or type lender symbol into the manual entry box to add it to the **Selected Lenders**.
 2. Click the **Add** button.
 3. Repeated steps 1 and 2 to add any additional lenders to the string.

Lending library response time for articles and loans are indicated with a small number next the lender symbol. Those needing **more than the 4 system days** to respond will be highlighted blue (8 days), yellow (12 days) and red (16 days). Those needed 2 days are highlighted green.

Libraries which own the item but are **not currently filling ILL requests** are considered “Non-Suppliers” and appear in lower case light gray font. You will not be able to add Non-Suppliers to the lending string.

Editing the Lending String

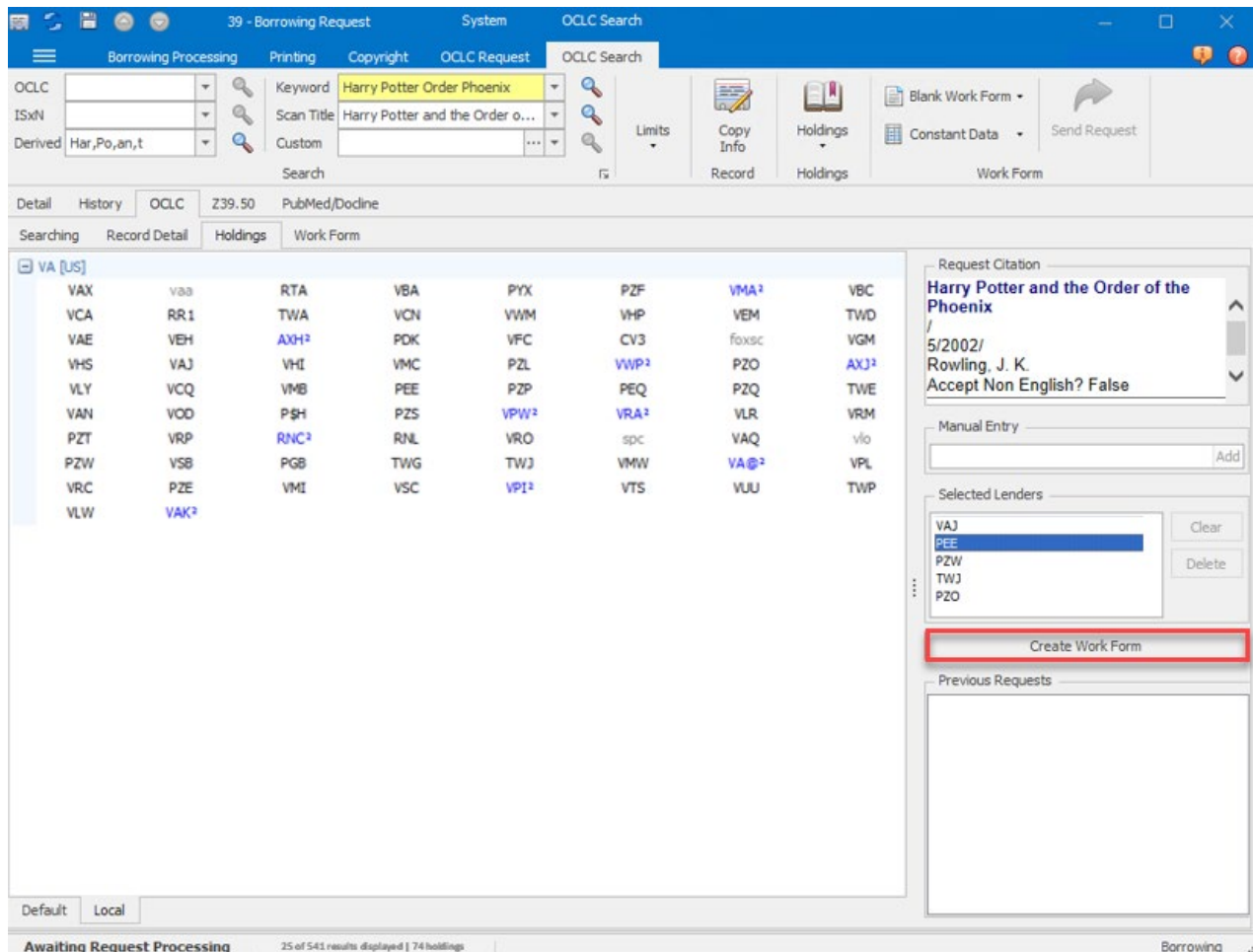
- The **Clear** option will remove all lenders from the string.
- The **Delete** option will remove only the highlighted lender.

For more information on creating the lending string, see [Selecting Lenders](#).

8) Creating & Editing the Work Form

Once you have finished creating your lender string, you will need to create the work form to send the request to the lending library.

1. Click the **Create Work form** button in the **Selected Lenders** box.
 - WorldCat bibliographic data will be added to your ILLiad request.
2. ILLiad will open the **Work Form** tab. Verify the **Constant Data** record. If necessary, update constant data and save.
 - Information in the Constant Data record is populated based upon the request type, borrowing information, and the defaults are set in the Customization Manager.



For more information on creating the work form, see [Creating and Editing the Work Form](#).

9) Sending the OCLC Request & Updating ILLiad

1. On the work form record, click **Send Request**. This will create the OCLC WSILL request and return you to the Details tab where you can see the assigned ILL number and bibliographic information from the WorldCat record.
2. Click the **Request Sent** button to save the information.

For information on troubleshooting after a request has been sent, see [Sending the OCLC Request](#).

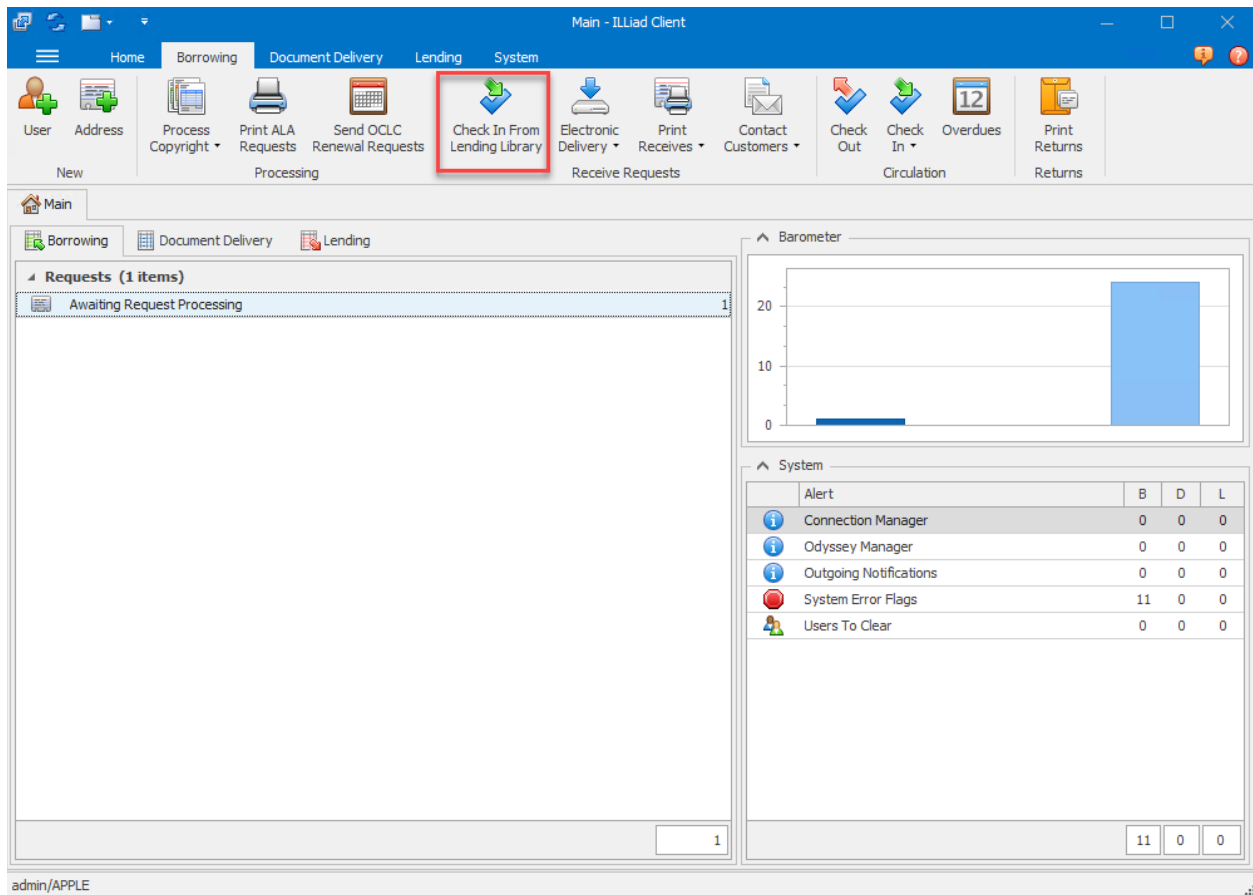
Receiving Loans- Loan Requests Only

Receiving loans covers the process for receiving borrowed material, producing the paperwork to attach to the loan, and checking it out to the patron.

10) Checking-In from Lending Library

All routine update actions for receiving and returning loans begin from the borrowing ribbon options, rather than from the queue lists. This differs from the previous steps in the borrowing process that took place primarily on the request form or in a queue.

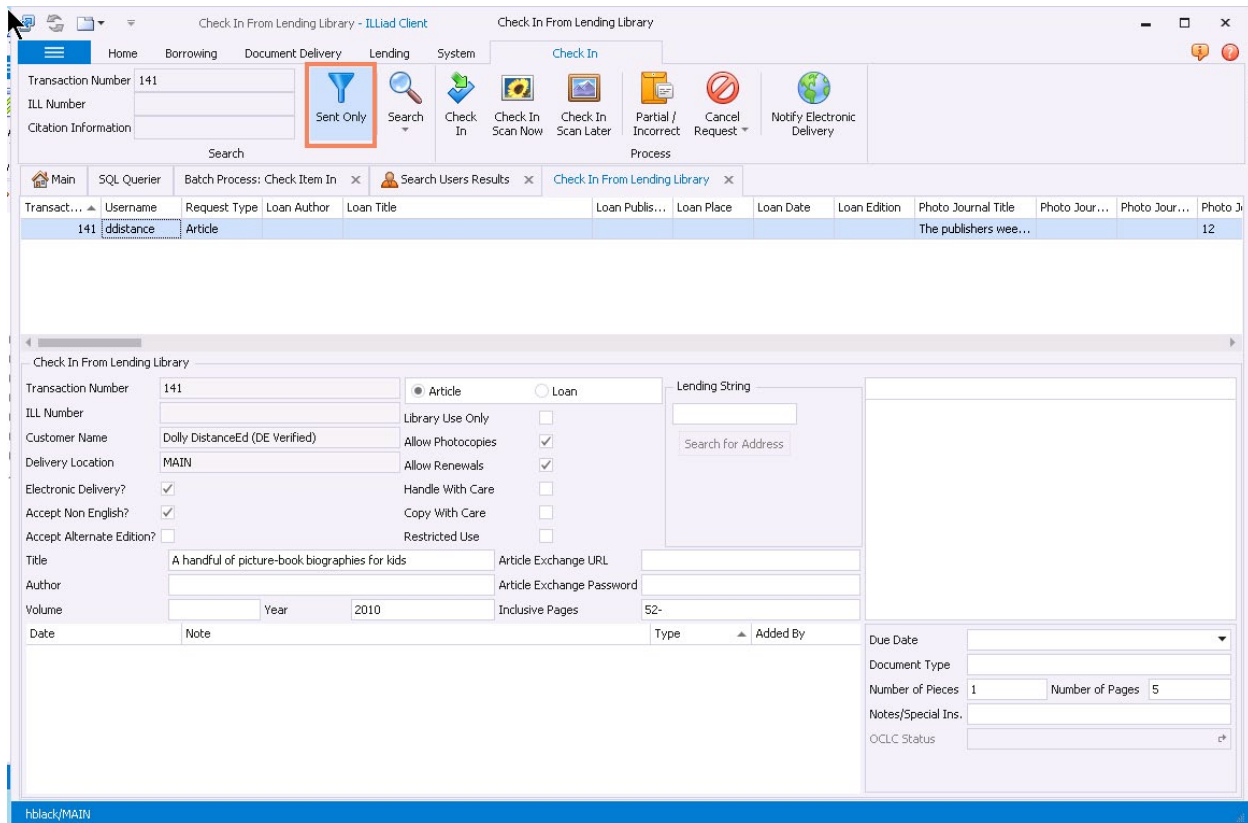
1. Open the **Borrowing** ribbon.
2. Click the **Check-In from Lending Library** button to open the processing tab with check-in options.



The screenshot shows the ILLiad Client software interface. The top ribbon is set to 'Borrowing'. The 'Check In From Lending Library' button is highlighted with a red box. Below the ribbon, there is a 'Requests (1 items)' section with a table containing one item: 'Awaiting Request Processing'. To the right, there is a 'Barometer' chart showing a single bar at approximately 25. Below the chart is a 'System' section with a table of alerts.

Alert	B	D	L
Connection Manager	0	0	0
Odyssey Manager	0	0	0
Outgoing Notifications	0	0	0
System Error Flags	11	0	0
Users To Clear	0	0	0

3. Search for the request from one of the query boxes in the top left of the ribbon.
 - Search by transaction, ILL request number, citation information.
 - The **Sent Only** option is active by default. This will limit searches to items in the Request Sent status to prevent skipping in the ILLiad workflow.



4. The transaction populates the lower workspace with basic information about the request.
 - The lending library and due date are generally populated by default. If not, manually update the information.
5. Verify request information against the item in hand.
6. Click the **Check In** button to update the request.
 - OCLC request will be updated to the Received status in WorldShareILL.
 - The request will also be updated to the Awaiting Post Receipt Processing status in ILLiad.

For more information on the check-in procedures, see [Checking Items in From the Lender](#).

11) Printing

Now that the item has been checked-in, the next step is to create print documentation to label the borrowed material with the patron's name, due date, and any other important information.

There are two types of print labels. You may choose to print either one or both of these documents and each can be customized for content and layout. See [Creating New Print Templates](#) for more information on creating custom print templates.:

BorrowingLoanLabels-

- Prints six labels per page.
- Designed to fit removable adhesive label stock that can be attached to an item for identification and updates

BorrowingLoanSlips-

- Prints three labels per page and is intended to be printed on plain paper.
- The label is designed as a pick-up notice, signed by patrons and returned to the ILL department to further update ILLiad.
- Can be attached to the item as a book strap or used as a pick-up/check-out notice.

To print these documents, please see the instructions below:

1. Click the **Print Receives** button from the **Borrowing** ribbon.
2. The printing prompts will open, choose one or both documents to print. Click **Print** to open the word template and merged word document for printing.
 1. Use the printing features in Word to send the document to the printer.
3. After printing, requests are automatically updated to the **In Transit to Pickup Location** status.
4. Attach the paperwork to the loaned item.

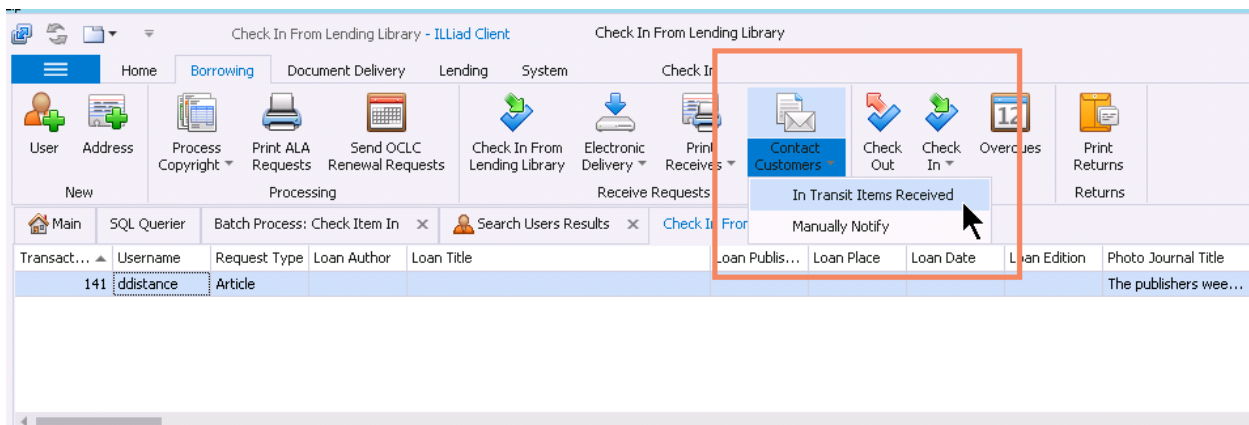
For more information on printing labels, see [Post Receipt Processing](#).

12) Contacting Customers

If you wish to skip the In Transit to Pickup Location status, please see the [Skipping the In Transit to Pickup Location Status](#) article. This status is used for libraries who have a separate delivery location or need time in between processing and checking in the item before notifying the patron that the item is available.

For the sites who use the In Transit to Pickup Location status, please follow the steps below:

1. Once the items have been received by the delivery location, update the request to the **In Transit Items Received** by clicking on the lower half of the contact customers button and selecting In Transit Items Received.



2. A check-in window will open. Scan the barcode on the item or enter the transaction number to the queue for processing. This will update the requests to the **Awaiting Customer Contact Status**.

- I. You can also complete these steps with the web-based tool WebCirc. This is helpful if you have more than one delivery location. For more information on WebCirc, see [Using WebCirc](#).
3. Any patrons whose Notification method is set to **Electronic** will be automatically notified by email.
 - I. Most ILLiad libraries are configured to send notification only electronically. If you have users who have elected to be notified by phone or print notice, you will need to take separate steps to notify them.
4. From the **Borrowing** ribbon, click the **Contact** customers button.
5. Request notifications will be queued and displayed in the **Borrowing Customer Contact** tab
 - I. Generate print notifications for notification by mail with the **Print Notifications** button.
 - a. Creates a print job to send to print notifications.
 - b. Note: Settings may need to be adjusted in the Customization Manager for this option to function.
 - II. Notify patron through a phone call and then update ILLiad.
 - a. The patron's phone number is located on the item record under patron information.
 - b. After you have called the patron, double-click the request to update it to the **Customer Notified by Phone** status in ILLiad.
 - c. Note: If you allow patrons to select phone notifications, you may want to customize the print receives a document to include a phone number.
6. Requests are updated to Customer Notified by E-Mail, Customer Notified by Mail or Customer Notified by Phone, remain in this status until checked-out to the patron.

For more information on contacting customers, see [Awaiting Customer Contact](#) or [Manually Contacting Customers](#).

13) Checking-Out to Patrons

There are two different methods of checking items out to patrons. Don't check the item(s) out until the customer has arrived at the institution to pick the item up. Please see the instructions below:

Option 1-

1. Auto-Process Option skips the queuing step. Click the **Auto-Process** button to activate.
2. Enter a transaction number to be retrieved.
 - I. Request automatically update to **Checked-Out to Customer** and move into the **Processed** queue.
3. *Optional- To remove the list of processed items from the screen, click the **Clear Processed** button.

Option 2-

1. From the **Borrowing** ribbon, click the **Check-Out** button to open the check-out screen.
2. Enter a **Transaction Number** or **ILL Number** in the left-hand query box to retrieve the request.
 - I. If you lack a number identifier, use the additional search options to find the request.
3. The request will queue the transaction in the lower grid of the **Queued** group.
4. Add any additional transactions to the queued status by repeating steps 1-3.

- I. *Optional- To remove an item from the queued list, highlight the request in the list and click the **Remove Item** list button.
5. When the list of items is ready to process, click the **Process Queue** button to move the Items from **Queued** to **Processed** queue and update the status to **Checked-Out to Customer**.

For more information on checking items out to patrons, see [Checking Items Out to Customers](#).

Returning Loans- Loan Requests Only

The process of returning loans starts when the patron returns the loan and ends when the loan has been shipped to the lending library.

14) Checking-In from Patrons

When the item is returned by the patron, the item will need to be checked back in. The process is very similar to the checking-out items to the patron's process. You also have the option to indicate the item is **In Transit from a Pick Up Location**. For details see [Marking Return Items as In Transit](#).

Please follow the check-in procedures below:

- Manually-
 1. From the **Borrowing** ribbon, click the **Check-In** button to open the check-in screen.
 2. Enter a **Transaction Number** or **ILL Number** in the left-hand query box to retrieve the request.
 3. A successful search will queue the transaction in the lower grid in the **Queued** group and display request information, including OCLC status, for verification purposes.
 4. Add any additional transactions to the queued status by repeating steps 1-3.
 5. When the list of items is ready to process, click the **Process Queue** button to move the Items from **Queued** to **Processed** queue, the OCLC request will be updated to **Returned**, and update the status to **Awaiting Return Label Printing**.

- Automated-
 1. Click the **Auto-Process** button to activate.
 2. Enter a transaction number to be retrieved.
 - I. The request will automatically update to **Awaiting Return Label Printing** and moved into the **Processed** queue.

For more information, see [Returning Items to the Lender](#).

15) Print Return Shipping Labels

This is the final step in the borrowing process for physical loan items. In this final stage, you will print shipping labels and return the item to the lender.

There are two types of print labels. You may choose to print either one or both of these documents and each can be customized for content and layout. See [Creating New Print Templates](#) for more information on creating custom print templates.:

BorrowingReturnLabels-

- Prints six labels per page.
- Designed to fit removable adhesive label stock that can be attached to a package for shipping.

BorrowingReturnSlips-

- Prints three labels per page and is intended to be printed on plain paper.
- Can be included with the returned item as a thank you note.

To print these documents, please see the instructions below:

1. From the **Borrowing** ribbon, click the **Print Returns** button to initiate the print job.
2. The printing prompts will open, choose one or both documents to print. Click **Print** to open the word template and merged word document for printing.
 - I. Use the printing features in Word to send the document to the printer.
3. Attach the paperwork to the loaned item.
4. The request will be updated to the **Request Finished** status.

For more specific detail on printing labels, see [Printing Returns](#).

This concludes the **Loan** borrowing process. Please continue to the next page for the rest of the **Article** borrowing process.

Receiving & Delivering Articles- Article Requests Only

This section is just an introduction to receiving and delivering articles electronically. Since processing electronic items have their own process, please see the [Electronic Delivery](#) section for more specific details.

In the Resource Sharing world, the terms Electronic Delivery and Document Delivery can be associated with different types of processes and services. Here is how the terms are used in ILLiad:

- Electronic Delivery
 - Delivering documents in a digital format between libraries and to patrons.
 - Utilizes electronic delivery software such as Odyssey or Article Exchange.
 - Posts to the web for patrons.
 - Operates as a scanner.
- Document Delivery
 - Module (like Lending or Borrowing) built into ILLiad.
 - Separates workflow to deliver items from ***your collection to your patrons.***

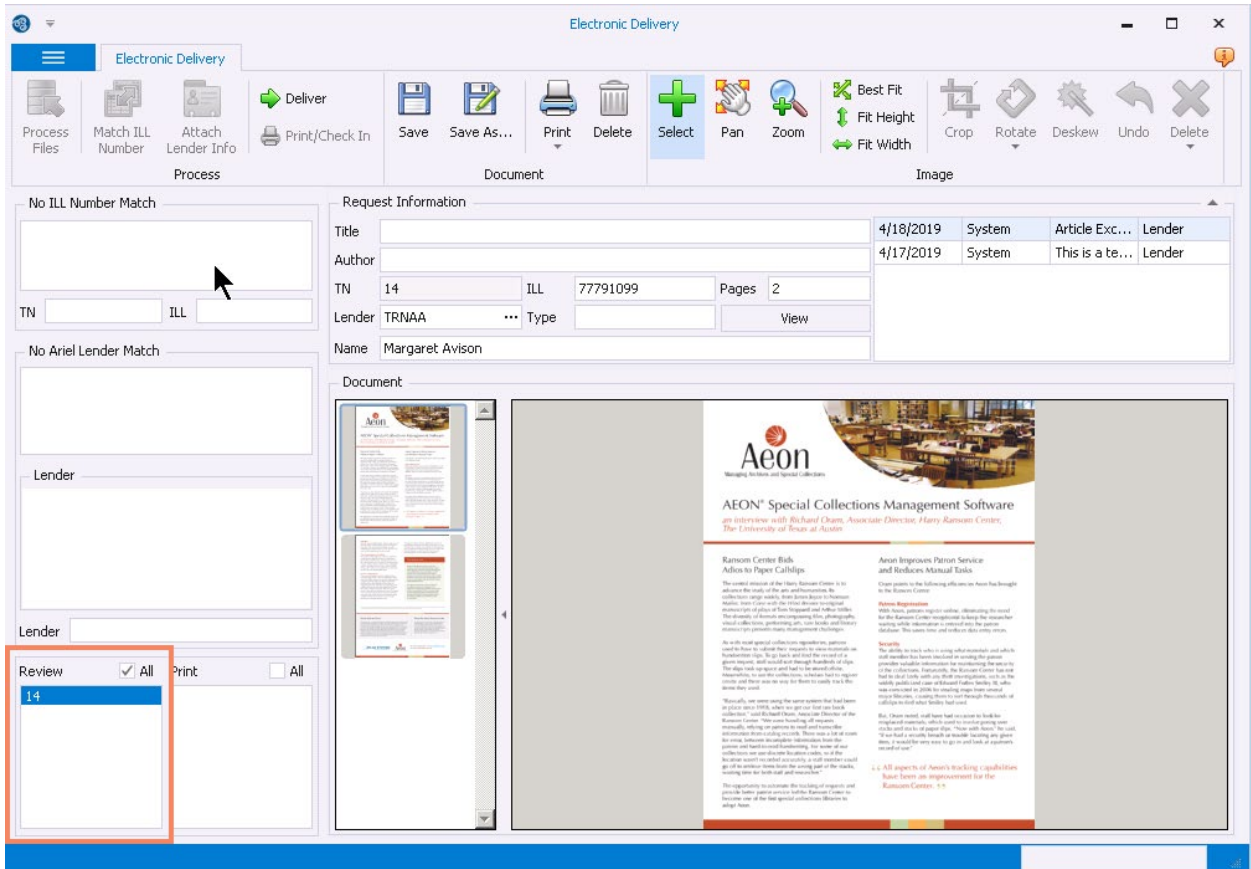
In this section, we are dealing with the delivery of article/non-returnable documents borrowed from other libraries to your patrons.

For additional information about documenting editing features, see [Electronic Document Editing Options](#).

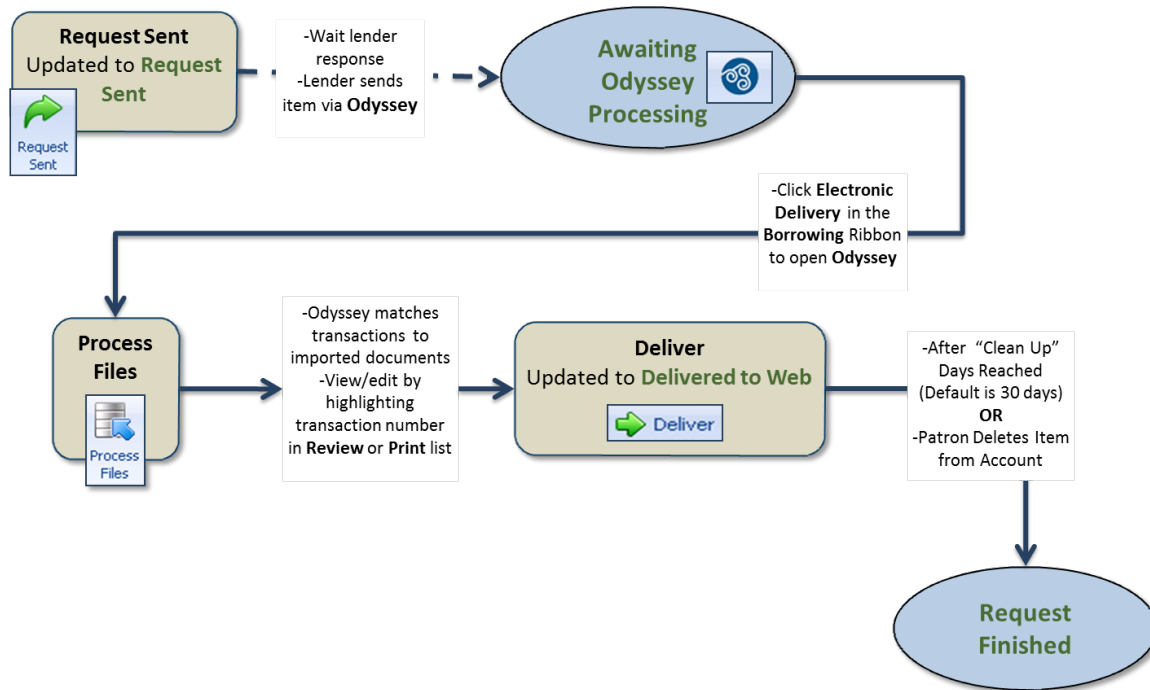
16) Odyssey Processing

Odyssey is ILLiad's electronic document delivery software which allows you to send and receive electronic documents to and from other Odyssey sites, ILLiad sites and any other vendor's software that supports the Odyssey protocol. To set up Odyssey, see [Odyssey Access Control](#).

1. The requests ready for item fulfillment will be in the **Request Sent** status unless the lender has sent the request via Odyssey, then the request will be in the **Awaiting Odyssey Processing** status.
2. Click the **Electronic Delivery** button from the **Borrowing** Ribbon.
3. Once the Electronic Delivery window opens, click the **Process Files** button.
 - I. **Awaiting Odyssey Processing** items will automatically be downloaded, matched to transaction number, and then will be added to the **Review** or **Print** list in the lower left of scanning form according to patron selection.
 - **Review**- an electronic delivery workflow that follows (see image below)
 - **Print**- Hard copy workflow (see **Paper Delivery** section below)



4. Click transaction number in the **Review** box to highlight the request and review the article right-hand viewing screen.
5. *Optional- View/Edit Scanned document with **Document Editing Features** on the Electronic Delivery ribbon.
6. Click the **Deliver** button in Processing Ribbon. The following actions will be performed by ILLiad:
 - Item is loaded to and becomes accessible from the patron's web account.
 - Patron is automatically notified by email of item availability.
 - Item will remain available until patron deletes the item or the expiration date is triggered as set in Customization Manager.
 - The transaction is updated to **Complete** in OCLC.
 - The transaction is updated to **Delivered to Web** status in ILLiad.



17) Odyssey Trusted Sender

1. Odyssey Trusted Sender- Allows electronic document delivery to patron direct upon receipt from the lending library **without staff intervention**.
 - a. Item received from libraries indicated as a trusted sender move directly from **Awaiting Odyssey Processing** to **Delivered to Web** status in ILLiad, the patron is notified, and OCLC is updated to **Complete**.
 - b. When **billing** is active for **Borrowing**, Trusted Sender delivery functions only for customers exempt from billing. ILL staff intervention is still required to attach the proper billing charges at the point of check-in from the Lending library.

18) Article Exchange

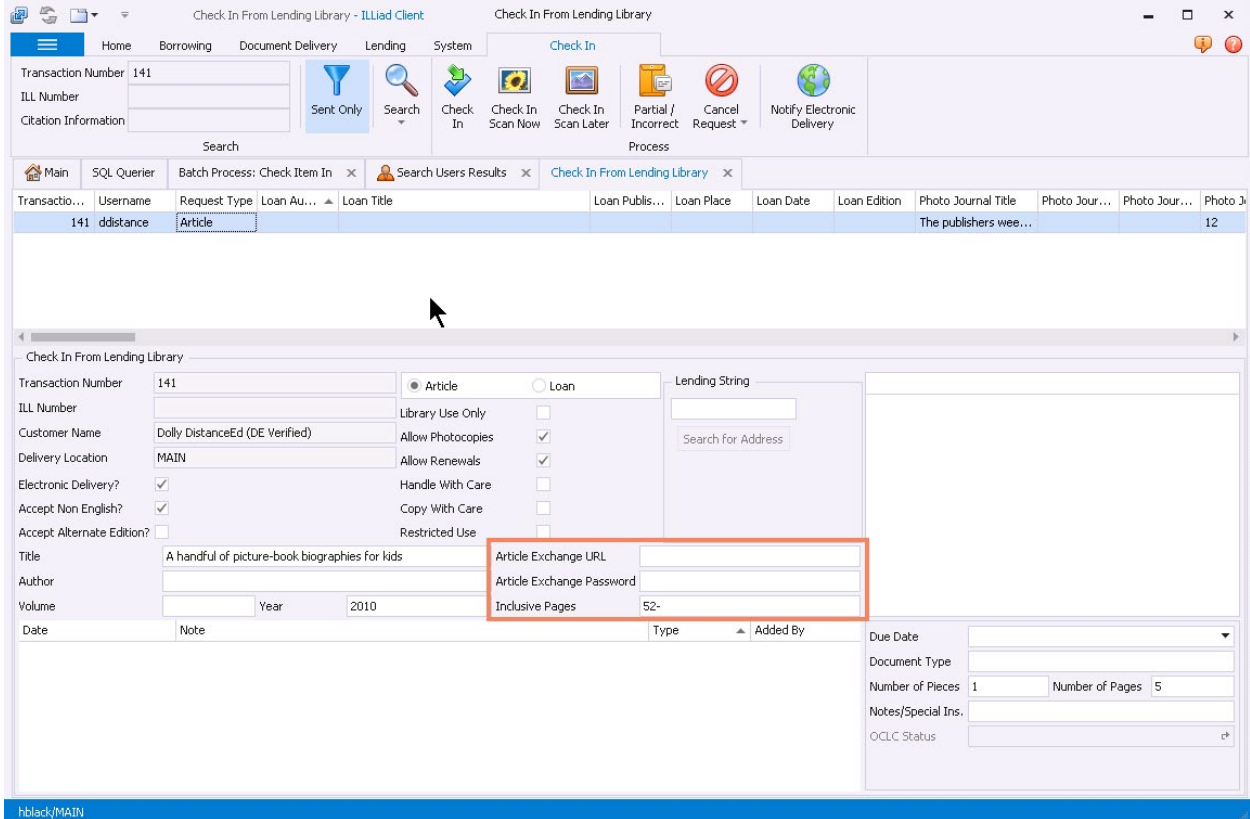
Article Exchange (AE) provides a single secure location where files can be uploaded to the Article Exchange document sharing site. It can be used as an alternative for libraries without Odyssey or when Odyssey sending fails for any reason. To set up Article Exchange, see [Configuring Article Exchange Integration](#).

There are two ways to receive AE notifications:

1. OCLC alert
 - a. When the lending library sends the OCLC alert, ILLiad will automatically pull the URL and password from the alert and download the article.
 - b. During the download process, the request will be placed in the **Awaiting Article Exchange Retrieval** status. Once the download is finished, the request will move to **Awaiting Odyssey Processing**.
 - c. See step 1 of Odyssey processing to process the request just as you would an Odyssey item.

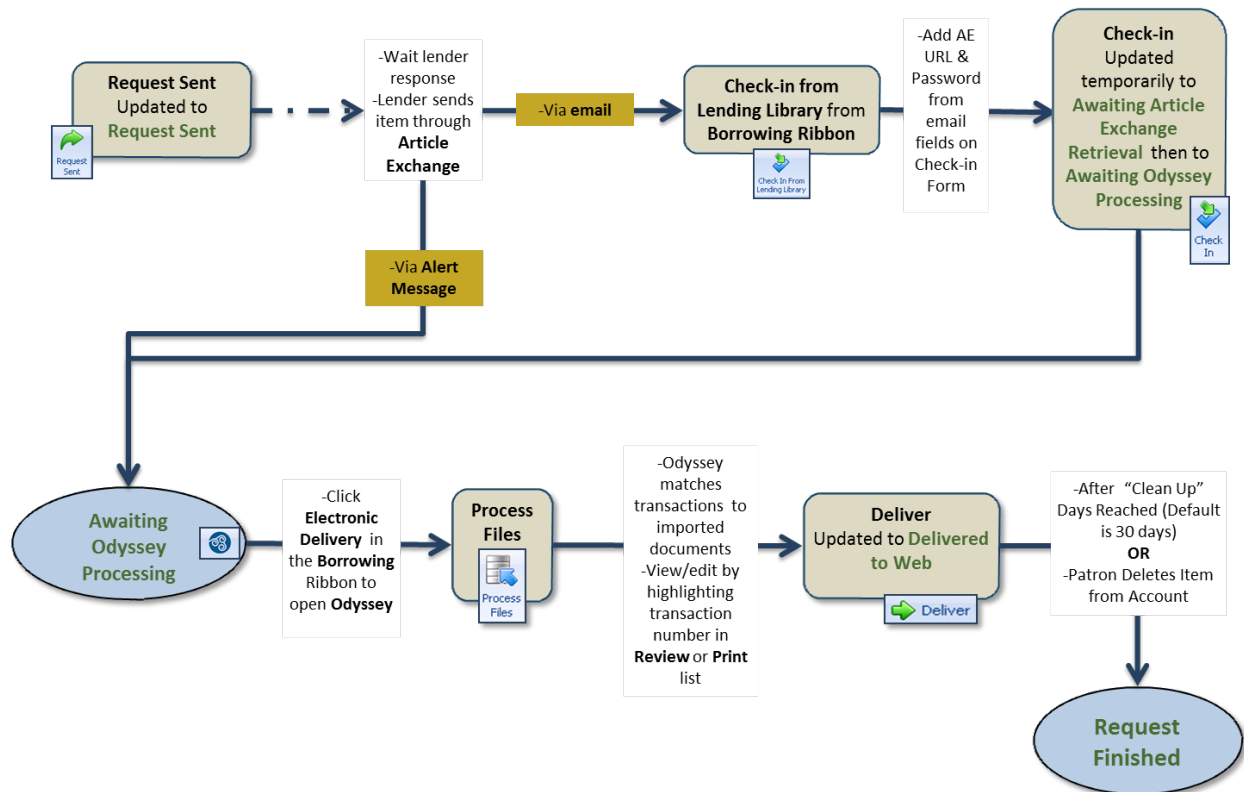
2. Email alert

- a. When you receive an email, click **Check In From Lending Library** on the Borrowing ribbon.
- b. The item updates window now will open, search the request by TN, ILL Number, or Citation Information.
- c. Add the URL and password in the **Check-In From Lending Library** section.



The screenshot shows the ILLiad Client interface. At the top, there are tabs for Home, Borrowing, Document Delivery, Lending, and System. The 'Check In' tab is active. Below the tabs, there are search fields for Transaction Number (141), ILL Number, and Citation Information. A search button is visible. Below the search fields, there are several icons for actions like 'Sent Only', 'Search', 'Check In', 'Check In Scan Now', 'Check In Scan Later', 'Partial / Incorrect', 'Cancel Request', and 'Notify Electronic Delivery'. Below these icons, there is a table with columns for Transaction Number, Username, Request Type, Loan Au..., Loan Title, Loan Publis..., Loan Place, Loan Date, Loan Edition, Photo Journal Title, Photo Jour..., Photo Jour..., and Photo J... The first row shows transaction number 141, username ddistance, request type Article, and loan title 'The publishers web...'. Below the table, there is a 'Check In From Lending Library' section. This section contains various fields and checkboxes for configuring the request. A red box highlights the 'Article Exchange URL', 'Article Exchange Password', and 'Inclusive Pages' fields. The 'Article Exchange URL' field contains the text 'A handful of picture-book biographies for kids'. The 'Article Exchange Password' field is empty. The 'Inclusive Pages' field contains '52-'. Other fields include Transaction Number (141), ILL Number, Customer Name (Dolly DistanceEd (DE Verified)), Delivery Location (MAIN), Electronic Delivery? (checked), Accept Non English? (checked), Accept Alternate Edition? (unchecked), Title (A handful of picture-book biographies for kids), Author, Volume, Year (2010), Date, Note, Type, Added By, Due Date, Document Type, Number of Pieces (1), Number of Pages (5), Notes/Special Ins., and OCLC Status.

- d. During the download process, the request will be placed in the **Awaiting Article Exchange Retrieval** status. Once the download is finished, the request will move to **Awaiting Odyssey Processing**.
 - i. If the request is sent to **Awaiting Article Exchange Review** status instead, it requires additional review of the article.



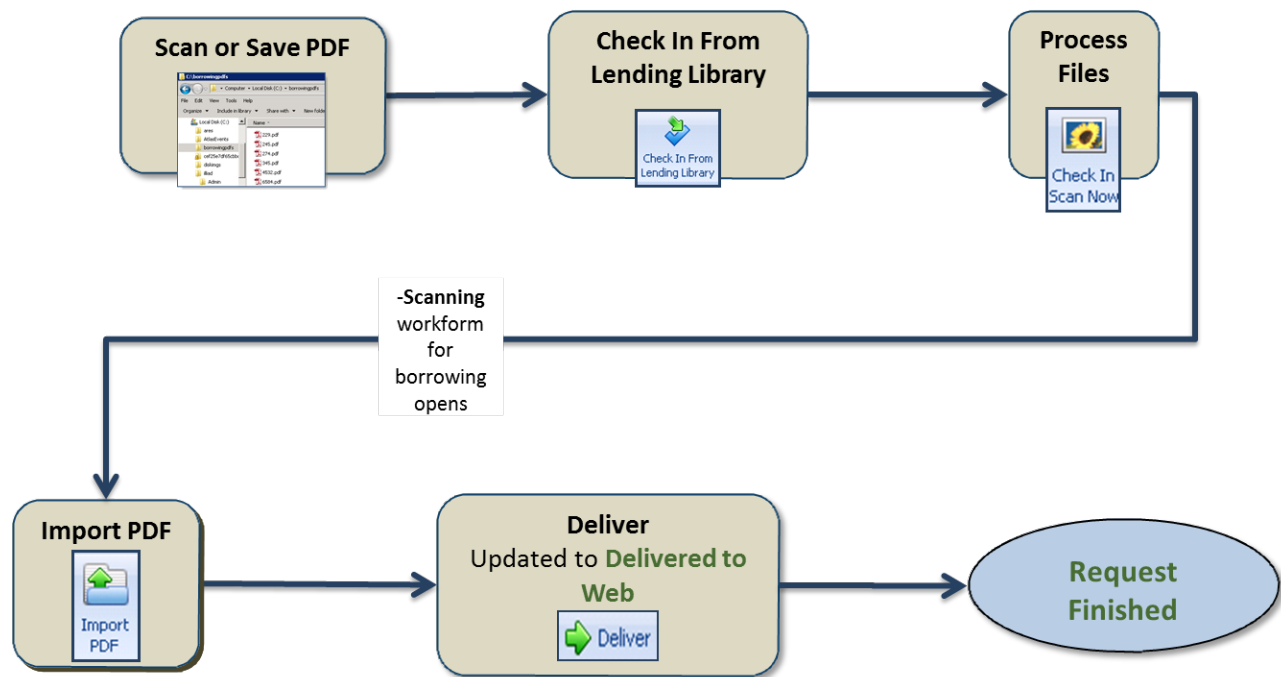
19) Paper or PDF Receipt

Items filled with paper and PDF or as PDF attachments (outside of Odyssey or Article Exchange) can be imported to deliver to patrons through ILLiad. For step by step procedures, see the instructions below:

1. Scan or save **PDF** with TN.pdf (e.g., 4532.pdf) or a consistent naming convention to a designated file explorer folder (e.g., C:\borrowingpdfs).
2. Click the **Check In From Lending Library** on the Borrowing ribbon.
3. The item updates window now will open, search the request by TN, ILL Number, or Citation Information.
4. Click the **Check In Scan Now**.
5. Once the Scanning work form opens, click **Import PDF** and then select the file to be loaded.
 - Note: Document Editing features are not available for PDF imported documents.
6. Click **Send via Odyssey**.

For items received in print, you may also use the scanning work form by implementing these steps:

7. Click the **Mark Found Scan Now** to scan items with Odyssey at this point in the workflow.
 - i. The scanning options will appear when a scanner is attached and configured to ILLiad machine.
 - ii. Place pages to be scanned on the scanner glass and then click the **Scan** button to initiate a scan.
8. Click the **Deliver** button in Ribbon.



20) Paper Delivery

While the vast majority of ILLiad libraries require users to receive articles and other non-returnable documents through electronic delivery, ILLiad does contain a workflow for delivery of articles in a hard copy format. For these situations, you may want to use paper delivery.

1. Follow the Odyssey processing workflow to the step where documents are loaded into the Electronic Delivery window and TNs display in the **Print** and **Review** windows in the lower right.
2. Click TN in the **Review** box to highlight the request and view in the right-hand viewing screen.
3. *Optional- View/Edit Scanned document with **Document Editing Features**.
4. Click the **Print/Check In** button in Processing Ribbon.
 - i. The document will be sent to the printer.
 - ii. The request will be updated to **Awaiting Post Receipt Processing** and will follow a loan workflow at this point by starting the process at Checking-Out to Customer.