ILLiad Borrowing Workflow Loans

Task on **Request Form**

Task in **Client**

Awaiting Request Processing

--Status after patron submits request from web
--Open request from queue list

Search for the item in your collection

--Verify item is **not** available via
+Z39.50 search
+Addon search
+Search in browser

Open **OCLC** tab to search WorldCat

--Search **WorldCat**
--Select record to use to make the ILL request

Create **Lending String**

--Use **Default Custom Holdings** or chose from **Holdings** drop-down menu
--Select symbol to add to lending string

Create **Workform**

--Use button on **Holdings** tab beneath **Selected Lenders** box

Click **Send Request** button

--Sends and creates OCLC WorldCat Resource Sharing Request in **Pending** status

Click **Request Sent** button

--Updates ILLiad request to **Request Sent** status

Wait response from lending library

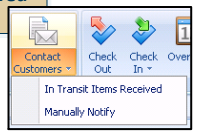
Check In from Lending Library

--Updated to **Awaiting Post Receipt Processing**
--OCLCUpdated to **Received**

Print Receives

--Receipt labels printed to attach to returnable items
--Updated to **In Transit to Pick-Up Location**

In Transit Items Received*



--Item Check-In at Pick-Up Location
--Updated to **Awaiting Customer Contact**

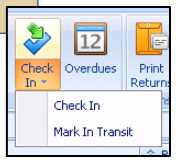
Contact Customers

--Updated to **Customer Notified via Email/ Phone/Mail**
--System automatically sends email notifications
–Phone & print notifications available for processing

Check Out

---Updated to **Checked Out to Customer**

Mark In Transit*



---Updated to **Checked Out to Customer**

Check In

---Updated to **Awaiting Return Label Printing**
--OCLC status updated to **Returned**

Print Returns

--Return address labels printed
--Status updated to **Request Finished**

Request Finished

***This step can be skipped for sites without multiple pick-up locations.**

ATLAS SYSTEMS
TRAINING & LIBRARY SOLUTIONS