



ILLiad

International Conference

Beyond the Basics

Handling Workflow Exceptions and Errors

Beyond the Basics



Thank you for joining me today!

John Brunswick

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Consultant*

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Logistics

Tuesday, March 17th

Social Event. Casino Night.5:00pm-8:00pm

Sponsored by  **ATLAS SYSTEMS**

Buses available along Atlantic Avenue route from 4:30pm-10:30pm

Wednesday, March 18th

Registration and

Continental Breakfast.....7:00am-8:30am

Welcome and Keynote Address8:30am-9:30am

Presentation Sessions9:45am-12:00pm

Lunch.....12:00pm-1:00pm

Atlas Update1:00pm-2:00pm

Presentation Sessions2:15pm-3:15pm

**Poster Sessions with Wine
& Cheese Reception**4:15pm-6:15pm

Reception Food Sponsored by  **Copyright
Clearance
Center**

Buses available along Atlantic Avenue route from 4:30pm-10:30pm

Thursday, March 19th

Logistics



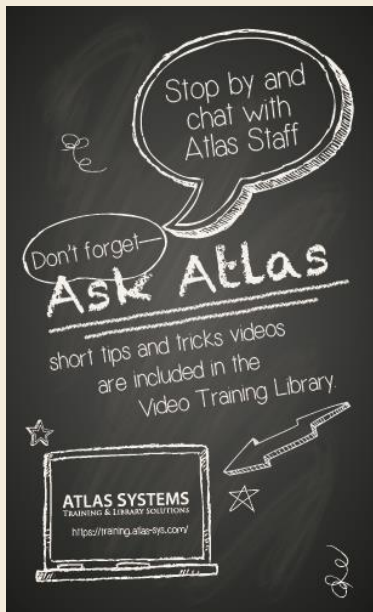
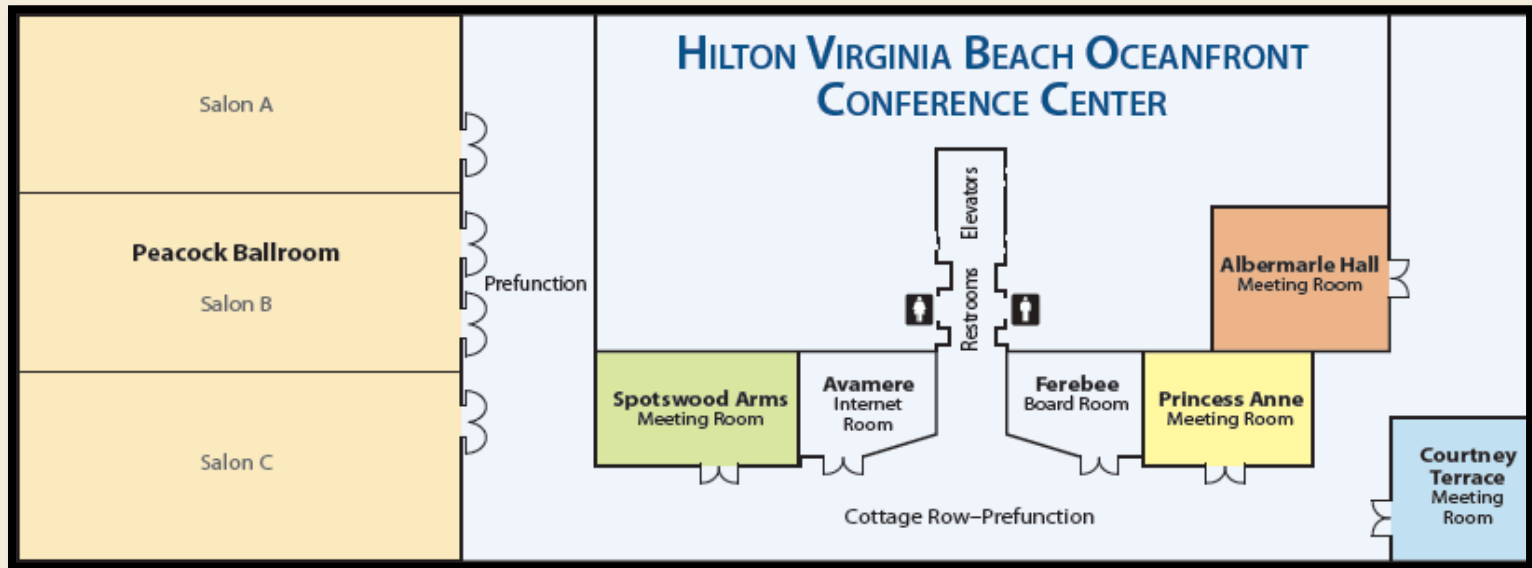
Shuttles will run Tuesday & Wednesday evenings from 4:30-10:30 pm.

There will be 6 designated stops (♦), but don't be afraid to flag the shuttle down if you are walking along the route. The restaurants at right are either one of the stops or within 2 blocks of a stop.



- | | | | | |
|--|--|--|---|---|
| <p>1 Catch 31 and Salacia
- Hilton Oceanfront (Conference Hotel)</p> | <p> SALACIA</p> | <p>2 IL GIARDINO RESTAURANTE
910 Atlantic Avenue # 200</p> | <p>3 BUCKWHEAT RESTAURANT
706 Atlantic Avenue</p> | <p>4 Maki Maki's
VALDEZ RESTAURANT OF A JAPANESE RESTAURANT
615 Atlantic Avenue</p> |
| <p>5 Waleman's
415 Atlantic Avenue</p> | <p>6 Planet Pizza
96 St. and Atlantic Avenue</p> | <p>7 Rudee's
227 Mediterranean Avenue</p> | <p>8 ROOMIES
308 Mediterranean Avenue</p> | |
| <p>9 TAMBO'S RESTAURANT
AT BRUNO'S CORNER
205 23rd Street</p> | <p>10 BIG ITALY</p> | <p>11 eat
905 Atlantic Avenue</p> | | |

Logistics



**We'll have a fifteen minute stretch
and
restroom break.**

Beyond the Basics



What Will We Talk About Today?

- Alerts
- Conditionals and Unfilleds
- OCLC Special Messages
- Partial and Incorrect Receipts
- Recalls
- Renewals
- When the problem lies elsewhere

Alerts



- Why do we get Alerts
 - The Stop Sign is an indication that you have an alert – something needs your attention
 - Alerts are located in the lower right corner of the Main Menu of the ILLiad Client
 - Number of reason why one may show up
 - User error – on either end
 - Incorrect settings
 - Network issues

Number TN

User Information ALL

Citation Information ALL



Search Requests

Username

Name

ID



Search Users

Symbol

Name

Address



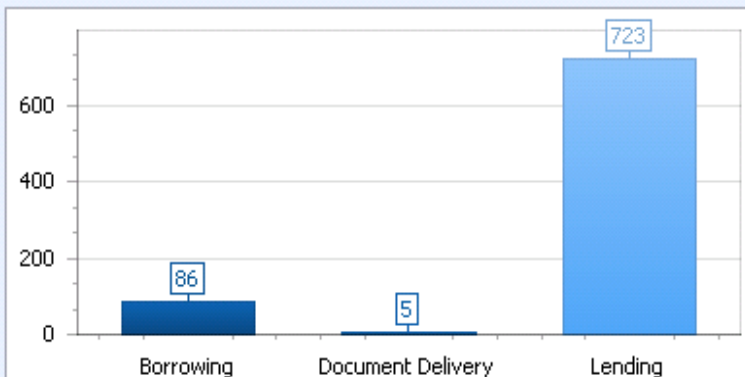
Search Addresses

Requests (229 items)

Awaiting Conditional Processing	1
Awaiting Odyssey Processing	5
Awaiting Request Processing	23
Awaiting Unfilled Processing	48
Cancelled by ILL Staff	37
Checked Out to Customer	4
Delivered to Web	2
Request Finished	69
Request Sent	14
Customer Notified via Mail	2
Received Partial/Incorrect Item	1
Loans Recalled from Patrons	1
In Transit from Customer	2
Customer Notified via Phone	1
Awaiting Stacks Searching	3
Awaiting Renewal OK Processing	2
Awaiting Document Provider Processing	1
Awaiting Denied Renewal Processing	1
OCLC Special Message: Received?	12

229

Barometer



System

Alert	B	D	L
Connection Manager	13	0	82
Odyssey Manager	0	0	4
Outgoing E-Mail	199	0	80
System Error Flags	47	0	0
Users To Clear	0	0	0

259 0 166

Alerts



- What types of Alerts are there?
 - Connection Manager
 - Problem communicating with OCLC
 - Odyssey Manager
 - Outgoing E-Mail
 - System Error Flags
 - Usually the result of a Lender Conflict
 - ISO Alerts
 - User To Clear

Alerts



- How do we resolve Alerts?
 - Connection Manager
 - Double click on the Alert line
 - Errors will be grouped by type
 - Open a request by double clicking on it
 - Click on the error icon (in red) to clear the error
 - Look at OCLC status, the request status, and the history
 - Decide what action(s) should be taken, if any, to correct
 - You can clear multiple errors by selecting one request in the grid, holding your shift key, and selecting another to highlight multiple requests – then click on Clear Selected Errors

Started 20150316 00:02:55
 Last Run 20150316 09:25:46
 Next Run 20150316 09:35:48


 Clear Selected Errors

Show Entries After


 Export Log

Connection Manager Details

Transactions

Log

Transactions Log

Transac...	Username	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jou...
------------	----------	--------------	-------------	------------	----------------	------------	-----------	--------------	---------------	---------------	---------------	--------------

Process Type: Borrowing (13 Errors)

Error: Received not allowed here (4 Errors)

223	max	Loan	Grisham, Jo...	The runawa...								
633	jrb	Article							American lib...	4	4	april
1028	johnrbuns...	Loan	Rand, Ayn.	Atlas shrug...								
1030	johnrbuns...	Loan	Brown, Dan...	Angels & de...								

Error: Record Not Found (9 Errors)

196	johnb4	Article							The whole ...	8	8	august
226	max	Article							American lib...	2	2	february
228	max	Article							Potato chip...	8	8	august
268	johnrb	Article							The whole ...	6	6	June
563	johnb	Article							Library & ar...	24	2	
644	jcella	Article							Pediatric de...	24	5	9
645	jcella	Article							Sage family...	26	3	8
720	johnb	Article							The whole ...	7	7	july
810	johnb	Loan	Mitchell, Da...	Internet ce...								

Process Type: Lending (82 Errors)

Error: Error: Complete not allowed here. (1 Errors)

370	Lending	Loan	Rand, Ayn.	Atlas shrug...	New York, ...							
-----	---------	------	------------	----------------	---------------	--	--	--	--	--	--	--

Error: Error: Renewal No not allowed here. (1 Errors)

375	Lending	Loan	Vonnegut, ...	Breakfast o...	[New York] ...							
-----	---------	------	---------------	----------------	----------------	--	--	--	--	--	--	--

Error: Record Not Found (68 Errors)



Lending Processing

Printing

OCLC

Manage

System

Errors



Connection Manager Error
Odyssey Manager Error
ISO Attention
System Error Flag
Error Clearing

Detail History OCLC Z39.50 PubMed/Docline Google Search OCLC AE Serials Solutions Search Innovative Search NLM Web Form

General Request Information

Transaction Number: 848 Article Loan

Username: Lending Service Type:

Transaction Date: 10/11/2012 1:50 PM Not Wanted After: 10/12/2012

Delivery Method: Site:

Service Level: Regular Shipping Options: Mail

Billing Account: Doc Type:

OCLC Information

ILL Number: 94665698

OCLC Number: 1754597

Lending String: *TRNAA

Borrower: TRNAB 1 ...

System ID: OCLC 126

OCLC Status: Record not found

Article Info | Loan Info | Collections | Local Holdings | Imported Request | Copyright | Invoic

Journal Title: Journal of forensic sciences.

Volume/Issue:

Month/Year/Pages: sept 2011 1-20

Article Author:

Article Title: test

Original Journal Title:

Item Author/Publisher:

Item Place/Edition:

- Accept Alternate Edition
- Accept Non English
- Allow Copies?
- Copyright Already Paid?
- Allow Renewals?
- Library Use Only?
- Replacement Pages?
- Priority Shipping
- Ariel
- Odyssey (PDF Enabled)

Item Information

Call Number:

Location:

Due Date:

Reason For Cancellation:

Item Num/Ref Num:

ISxN: 0022-1198

Special Instructions:

Max Cost/Pieces: 0.00

Date	Note	Type	Added By
9/12/2012 4:27 PM	Billing Notes; This is a test account. Please do not fill.	System	System
9/12/2012 4:27 PM	Borrowing Notes; This is a test account. Please do not fill. (maxCost; free)	System	System

Citation Information

Cited In: [Chicago, Ill.]; Callaghan and

Title:

Date:


Volume/Pages:

Alerts



- How do we resolve Alerts?
 - Odyssey Manager
 - Double click on the Alert line
 - Problems in Borrowing and Document Delivery are rare
 - May be a port problem (7968)
 - May be server problems at other library
 - You can resend a failed request to another library

Started 20150311 03:30:12
 Last Run 20150316 09:14:34
 Next Run 20150316 09:15:34
 Odyssey Manager Details


 Clear Selected Errors

Show Entries After


 Export Log

Main Odyssey Manager X

Transactions Log

Transactio...	Username	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...
[-] Process Type: Lending (4 Errors)												
[-] Error: Sending Failed (4 Errors)												
369	Lending	Article							The whole ...	4	4	
568	Lending	Article							American lib...	8	8	
1009	Lending	Article							Journal of I...	5	5	
1013	Lending	Article							test	test	test	



Cancel Request

Conditionalize Request

Mark Found

Mark Found Scan Now

Route

Policies Directory

Resend Request

Billing

View

Send E-Mail

Print Request

Add to Print Queue

Print and Empty Queue

Pending Updates

Process

Routing

OCLC

Odyssey

Billing

Lender

Printing

System

Detail

History

OCLC

Z39.50

PubMed/Docline

Google Search

OCLC AE

Serials Solutions Search

Innovative Search

NLM Web Form

General Request Information

Transaction Number	1013	<input checked="" type="radio"/> Article <input type="radio"/> Loan	
Username	Lending	Service Type	
Transaction Date	3/17/2014 10:54 AM	Not Wanted After	09/15/2013
Delivery Method		Site	
Service Level	Regular	Shipping Options	Mail
Billing Account		Doc Type	

OCLC Information

ILL Number	107825968
OCLC Number	
Lending String	*TRNAA, TRNAA, TRNAA
Borrower	TRNAB 1
System ID	OCLC 1
OCLC Status	Record not found

Journal Title	test		
Volume/Issue	test	test	
Month/Year/Pages		test 2000	test
Article Author	test		
Article Title	test		
Original Journal Title			
Item Author/Publisher			
Item Place/Edition			

- Accept Alternate Edition
- Accept Non English
- Allow Copies?
- Copyright Already Paid?
- Allow Renewals?
- Library Use Only?
- Replacement Pages?
- Priority Shipping
- Ariel
- Odyssey (PDF Enabled)

Item Information

Call Number	
Location	
Due Date	
Reason For Cancellation	
Item Num/Ref Num	
ISxN	1133-0686
Special Instructions	
Max Cost/Pieces	0.00

Date	Note	Type	Added By
8/16/2013 5:35 PM	Billing Notes; This is a test account. Please do not fill.	System	System
8/16/2013 5:35 PM	Borrowing Notes; This is a test account. Please do not fill. (maxCost; free)	System	System

Citation Information

Cited In	
Title	
Date	
Volume/Pages	

Alerts



- How do we resolve Alerts?
 - Outgoing E-Mail
 - Double click on the Alert line
 - List of failed e-mails will appear
 - Cancel or Resend
 - May have to edit before sending if e-mail address is improperly formatted

Cancel E-Mail |
 Resend E-Mail |
 Resend E-Mails |
 Auto Refresh |
 Last Failed Refresh: 3/16/2015 9:39:21 AM |
 Last Pending Refresh: 3/16/2015 9:39:21 AM |
 Refresh

Transaction	Date/Time	Type	Reference	To	Subject	Staff	Note
0	11/10/2011 2:41:...	User			ILLiad New User Registratio...	atlas	System error: No connection could be...
635	11/11/2011 1:53:...	Transaction			Automated Interlibrary Loa...	atlas	System error: No connection could be...
633	11/11/2011 2:06:...	Transaction			Requested Item Delivered ...	Odyssey	System error: No connection could be...
634	11/11/2011 2:07:...	Transaction			Requested Item Delivered ...	Odyssey	System error: No connection could be...
631	11/11/2011 2:19:...	Transaction			Requested loan has arrived	atlas	System error: No connection could be...

From: "Interlibrary Loan Office" <jbrunswick@atlas-sys.com>
 To: jbrunswick@atlas-sys.com
 CC: [Empty] BCC: [Empty]
 Subject: ILLiad New User Registration Notification

Thank you for registering with ILLiad.
 You provided the following information.

Personal Information for maxie

Name: maxwell brunswick
 Department: Art

Your Mailing Address is:
 244 Clearfield Ave.
 Suite #407
 Virginia Beach VA 23451

Your phone number is: 555-1212

We will notify you by E-Mail when an item is received.

Your preferred photocopy delivery method is: Mail to Address.

Alerts



- How do we resolve Alerts?
 - System Error Flags
 - Double click on the Alert line
 - Double click on an entry
 - Look at history
 - May have to contact other library

Home Borrowing Document Delivery Lending System System Error Flags

Clear Selected Errors Transactions

Main System Error Flags X

Drag a column header here to group by that column

Transaction N...	Username	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jo
13	Lending	Loan	King, Steph...	Carrie /	New York ; ...							
45	Lending	Article							Volunteer a...	2	3	
57	fredfunk	Loan	michael moore	dude where...								
58	fredfunk	Article							The whole ...	4	4	april
61	fredfunk	Loan	Rey, Margret.	Curious Ge...	Houghton ...	Boston	1958					
66	johnb	Article							Whole cat j...	2	2	feb
67	johnb	Article							Potato chip...	5	5	may
68	johnb	Article	Rand, Ayn.	Atlas shrug...	Baltimore, ...				Teaching m...			
69	johnb	Loan	Moore, Mic...	Dude, wher...								
71	johnb	Article							Newsweek.	55	5	may
75	Lending	Loan	Roy, Ron,; ...	The bald ba...	New York ; ...							
81	johnb	Article							The whole ...	3	3	march
89	johnb2	Article							The whole ...	5	5	may
90	johnb2	Article							Potato chip...	7	7	july
93	Lending	Loan	Grisham, Jo...	The runawa...	New York ; ...							
94	Lending	Article							Policy studi...	4	5	
95	Lending	Loan	author	Oral health....	Don Mills, O...		year		Techniques ...			
102	Lending	Article							The evoluti...	Patron nee...		
155	Lending	Loan	Kotzwinkle, ...	Fata Morga...	New York ; ...							
156	Lending	Loan	Jin, Ha, 1956-	War trash /	New York ; ...							
157	Lending	Loan	Cohen, Mor...	How to find...	St. Paul, Mi...							
158	Lending	Article							The Serials l...	Vol. 21	Issue 2/3	

Alerts



- How do we resolve Alerts?
 - ISO Alerts
 - Double click on the Alert line
 - Double click on an entry
 - Look at history
 - May have to contact other library

Alerts



- How do we avoid Alerts?
 - Review your workflow
 - Be mindful of the OCLC status
 - Keep up on your Alerts

Alerts



- Need help?
 - ILLiad 8.5 Documentation
 - ILLiad User Guide, ILLiad Client Basics, System Logs and Alerts
 - Call or e-mail support

Conditionals and Unfilled



- Conditionals start on the Lending side
 - Click on Conditionalize Request on Lending Processing Ribbon
 - Select reason from dropdown menu
 - Edit note if needed
 - Click on Conditionalize Request button
 - Request moves to Request Conditionalized queue
 - If Borrower agrees it moves into Awaiting Conditional Request Processing
 - Process request as you normally would

Conditionals and Unfilleds



- If Borrower says No or does nothing it stays at Request Conditionalized
 - Should move it manually to Cancelled by ILL Staff
- On the Borrowing side
 - Request will move to Awaiting Conditional Processing
 - Open the request
 - Click on the OCLC Ribbon at the top of the request
 - Select Yes or No
 - Yes will send it back to the lender for processing, make sure you indicate agreement with the condition
 - No moves it to next lender or unfilled depending on the circumstances

General Request Information

Transaction Number: 1155 Article Loan

Username: Lending Service Type:

Transaction Date: 3/5/2015 3:15 PM Not Wanted After: 03/12/2015

Delivery Method: Site:

Service Level: Regular Shipping Options: Mail

Billing Account: Doc Type:

OCLC Information

ILL Number: 142754934

OCLC Number: 39533921

Lending String: TRNAA,*TRNAA,TRNAA

Borrower: TRNAB 1

System ID: OCLC 1450

OCLC Status: Record not found

Article Info | Loan Info | Collections | Local Holdings | Imported Request | Copyright | Invoic

Title: The victors : Eisenhower and his boys : the men of World War II /

Author: Ambrose, Stephen E.

Publisher: New York, NY : Simon & Schuster, ©1998.

Place:

Date:

Edition:

Original Loan Author:

Original Loan Title:

Accept Alternate Edition
 Accept Non English
 Allow Copies?
 Copyright Already Paid?
 Allow Renewals?
 Library Use Only?
 Replacement Pages?
 Priority Shipping
 Ariel
 Odyssey

Item Information

Call Number:

Location:

Due Date: 4/15/2015

Reason For Cancellation:

Item Num/Ref Num:

ISxN: 9780684856285

Special Instructions:

Max Cost/Pieces: 0.00

Date	Note	Type	Added By
3/5/2015 3:15 PM	Borrowing Notes: This is a test account. Please do not fill. (maxCost: free)	System	System
3/5/2015 3:15 PM	Billing Notes: This is a test account. Please do not fill.	System	System

Citation Information

Cited In: New York, NY : Simon & Schu

Title:

Date:

Volume/Pages:

Complete Receive Not Received Return Undo Shipped Recall
 Yes No Show
 Manual Options Conditional Request

General Request Information

Transaction Number: 1174 Article Loan

Username: johnb Wanted By: _____

Transaction Date: 3/16/2015 11:56 AM Not Wanted After: 05/12/2015

Delivery Method: Hold for Pickup Site: _____

Service Level: Regular Shipping Options: _____

Billing Account: _____ Doc Type: Book

OCLC Information

ILL Number: 144792458

OCLC Number: 23870219

Lending String: *TRNAB, TRNAB, TRNAB, TRNAB, TRNA

Lender: _____

System ID: OCLC _____

OCLC Status: CONDITIONAL

Loan Info Collections Local Holdings Imported Request User Copyright Invoice

Title: Scarlett : the sequel to Margaret Mitchell's Gone with the wind /

Author: Ripley, Alexandra.

Publisher: _____

Place: _____

Date: _____

Edition: _____

Original Loan Author: margaret mitchell

Original Loan Title: gone with the wind

- Accept Alternate Edition
- Accept Non English
- Allow Copies?
- Copyright Already Paid?
- Allow Renewals?
- Library Use Only?
- Replacement Pages?
- Priority Shipping
- Ariel

Item Information

Call Number: _____

Location: _____

Due Date: _____

Reason For Cancellation: _____

Item Num/Ref Num: _____

ISxN: _____

Special Instructions: _____

Max Cost/Pieces: _____

Date	Note	Type	Added By
3/16/2015 11:56 AM	TRNAB: Checked out	System	System
3/13/2015 3:43 PM	Please leave for John B.	User	johnb

Citation Information

Cited In: _____

Title: _____

Date: _____

Volume/Pages: _____

Conditionals and Unfilleds

- Unfilleds happen when a request runs through a lending string without being filled
 - If you are going to resubmit the request on OCLC select the OCLC tab from the Borrowing Processing Ribbon, search the Holdings again, and submit the new request
 - The old request will be automatically deleted
 - If you are going to resubmit the request in a different system use the Import into Resubmission button on the Borrowing Processing Ribbon
 - Make sure to delete the request from OCLC by clicking on the OCLC Ribbon, Show Request, and selecting Delete

Conditionals and Unfilleds



- If you are going to cancel the request make sure to delete it from OCLC first
 - Click on the OCLC Ribbon, Show Request, and select Delete
 - Once the request has been deleted then cancel it in ILLiad



System

Borrowing Processing Printing Copyright OCLC

Complete Receive Not Received Return Undo Shipped Recall

Yes No Show

Manual Options Conditional Request

Detail History OCLC Z39.50 PubMed/Docline Google Search OCLC AE Serials Solutions Search Innovative Search NLM Web Form

General Request Information

Transaction Number	1180	<input checked="" type="radio"/> Article	<input type="radio"/> Loan
Username	johnb	Wanted By	
Transaction Date	3/13/2015 4:12 PM	Not Wanted After	05/12/2015
Delivery Method	Mail to Address	Site	
Service Level	Regular	Shipping Options	
Billing Account		Doc Type	Article

OCLC Information

ILL Number	144792944
OCLC Number	47801761
Lending String	TRNAB, TRNAB, TRNAB, TRNAB, TRNAB
Lender	
System ID	OCLC
OCLC Status	EXHAUSTED

Loan Info Collections Local Holdings Imported Request User Copyright Invoice

Journal Title	Journal of access services		
Volume/Issue	5	5	
Month/Year/Pages	may	2010	5-eoa
Article Author	fred funk		
Article Title	scanners I have known		
Original Journal Title	journal of access services		
Item Author/Publisher			
Item Place/Edition			

- Accept Alternate Edition
- Accept Non English
- Allow Copies?
- Copyright Already Paid?
- Allow Renewals?
- Library Use Only?
- Replacement Pages?
- Priority Shipping
- Ariel

Item Info 1

Date	Note	Type	Added By
3/13/2015 3:50 PM	Please leave for John B.	User	johnb

Item Information

Call Number	
Location	
Due Date	
Reason For Cancellation	
Item Num/Ref Num	
ISxN	
Special Instructions	
Max Cost/Pieces	

Citation Information

Cited In	
Title	
Date	
Volume/Pages	



Home

Save	Delete	Show Transaction	Yes	No	Manual Complete	Manual Receive	Manual Not Received	Manual Return	Undo Shipped
Process			Conditional		Manual Processing				

Work Form [Detail](#) [Local Holdings](#) [Collection Data](#)

General Information

ILL	144792944	Borrower	TRNAA	Req Date	20150313	Need Before	20150412
Status	EXHAUSTED	Patron	ILLiad User bri	Rec Date		Renewal Req	
OCLC	47801761	Source	ILLiad	Due Date	N/A	New Due Date	
Lending String	TRNAB, TRNAB, TRNAB, TRNAB, TRNAB			AE Alert			

Bibliographic Information

U Title	Journal of access services (Online)	Title	Journal of access services				
Author		Edition		Series			
Article	scanners I have known	Article Author	fred funk				
Imprint	Binghamton, NY : Haworth Press	Volume	5	No	5		
Date	may 2010	Pages	5-eoa	ISSN	1536-7975		
Verified	<TN:1180><ODYSSEY:216.54.57.240/ILL> OCLC	DOI		PMID			

[Borrowing](#) [Lending](#)

Ship To Attention		Bill To Attention			
Ship To Address	Atlas Systems, Inc./244Clearfield Ave/Suite 407/Va Beach, VA 23		Bill To Address	Atlas Systems, Inc./244Clearfield Ave/Suite 407/Va Beach, VA	
City		State/Province		City	
Postal Code		Country		Postal Code	
Ship Via	Library Mail	Max Cost	35.00	Type	Ifm
Borrowing Notes	This is a test account. Please do NOT fill. Thank you!		Billing Notes	THIS IS A TEST ACCOUNT! PLEASE DO NOT FILL	
Email	CD default email field		Affiliation	We are an OCLC partner developer - not a library.	
Fax			Locations		

Conditionals and Unfilleds



- Need help?
 - ILLiad 8.5 Documentation
 - ILLiad User Guide, Lending, Searching Lending Requests, Lending Conditionals
 - ILLiad User Guide, Borrowing, Searching and Sending Requests, Borrowing Conditionals
 - ILLiad User Guide, Borrowing, Searching and Sending Requests, Borrowing Unfilled Requests
 - Call or e-mail support

OCLC Special Messages



- Special Messages are now flagged in ILLiad 8.5
 - You can still get to them by going to the System Ribbon and selecting Search/Review Statuses
 - Borrowing
 - Overdue
 - Received?
 - Borrower Lost
 - Lending
 - Complete?
 - Not Received
 - Lender Lost

OCLC Special Messages



- Resolving Special Messages
 - Overdue
 - Contact Patron if not returned yet
 - Update the request to Returned normally or manually
 - For normal update go to the Borrowing Ribbon and select Check In
 - For manual update go to the OCLC Ribbon at the top of the request and select Return
 - Contact the lending library
 - Money may change hands...

OCLC Special Messages



- Resolving Special Messages
 - Received?
 - If it has arrived update the request to Received, either manually or through the normal Check In From Lending Library process in ILLiad
 - Go to the OCLC Ribbon at the top of the request, click on Received to update manually
 - If it has not arrived update the request manually to Not Received
 - Go to the OCLC Ribbon at the top of the request, click on Not Received to update manually
 - Lender gets Special Message Not Received

OCLC Special Messages



- Resolving Special Messages
 - Borrower Lost

OCLC Special Messages



- Resolving Special Messages
 - Complete?
 - If it has been returned update the request to Complete, either manually or through the normal Lending Returns process in ILLiad
 - Go to the OCLC Ribbon at the top of the request, click on Complete to update manually
 - If it has not been returned contact the Borrowing library
 - You may want to check your stacks to see if it has been reshelfed without being checked in

OCLC Special Messages



- Resolving Special Messages
 - Not Received
 - Check tracking in ILLiad
 - Check shelf to see if item was actually sent
 - Check with Borrowing library to see if they have received it
 - Check with delivery service
 - Money may change hands...

OCLC Special Messages



- Resolving Special Messages
 - Lender Lost
 - When the Borrower has lost the item and updated the record to Lost
 - Read this as “tell the Lender it is lost”
 - Contact the Borrowing library to resolve
 - Money may change hands...

OCLC Special Messages



- Resolving Special Messages
 - Borrower Lost
 - When the Lender has lost the item (or it has gone missing in transit) and has updated the record to Lost
 - Read this as “tell the Borrower it is lost”
 - Contact the Lending library to resolve
 - Money may change hands...

OCLC Special Messages



- If you are working with a flagged request do not forget to remove the flag once the problem is resolved
 - Open the request
 - Click on Remove Flag and make the appropriate selection



Cancel Request Conditionalize Request Mark Found Mark Found Scan Now Route Add Flag Remove Flag Policies Directory Resend Request Billing View Send E-Mail Pending Updates

Detail History OCLC Z39.50 PubMed/Docline Google Search OCLC AE Powells Innovative Search NLM Web Form

General Request Information

Transaction Number	1121	<input type="radio"/> Article <input checked="" type="radio"/> Loan	
Username	Lending	Service Type	
Transaction Date	3/11/2015 2:36 PM	Not Wanted After	10/08/2014
Delivery Method		Site	
Service Level	Regular	Shipping Options	Mail
Billing Account		Doc Type	

OCLC Information

ILL Number	129228211
OCLC Number	50645663
Lending String	*TRNAA
Borrower	CUH 1 ...
System ID	OCLC 177
OCLC Status	CLOSE_UNCONFIRMED

Loan Info Collections Local Holdings Imported Request Copyright Invoice Additions

Title	Principles of project finance /
Author	Yescombe, E. R.
Publisher	Amsterdam ; Boston : Academic Press, c2002.
Place	
Date	
Edition	
Original Loan Author	
Original Loan Title	

- Accept Alternate Edition
- Accept Non English
- Allow Copies?
- Copyright Already Paid?
- Allow Renewals?
- Library Use Only?
- Replacement Pages?
- Priority Shipping
- Ariel
- Odyssey

Item Information

Call Number	
Location	
Due Date	4/10/2015
Reason For Cancellation	
Item Num/Ref Num	
ISxN	9780127708515 (alk.
Special Instructions	
Max Cost/Pieces	15.00IFM

Date	Note	Type	Added By
9/8/2014 5:16 PM	Borrowing Notes: FEIN 94-2581680 - Thank You! We do not accept tricolor. (maxCost: \$15.00)	System	System

Citation Information

Cited In	Amsterdam ; Boston : Acader
Title	
Date	
Volume/Pages	

OCLC Special Messages



- Need help?
 - ILLiad 8.5 Documentation
 - ILLiad User Guide, ILLiad Client Basics, OCLC Special Messages
 - Call or e-mail support

Partial and Incorrect Receipts

- Handling partial or incorrect receipts
 - When someone sends you the wrong thing or only part of the thing you wanted
 - From the Check In From Lending Library Ribbon, click on Partial/Incorrect
 - The request will move to Received Partial/Incorrect Item
 - Contact Lending library to resolve
- OR
- Receive and return item and start over

Transaction Number
 ILL Number
 Citation Information

Sent Only Search

Check In Check In Scan Now Check In Scan Later Partial / Incorrect Request Cancel Request Notify Electronic Delivery

Process

Main Check In From Lending Library

Transac...	Username	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...
68	johnb	Article	Rand, Ayn.	Atlas shrug...	Baltimore, ...				Teaching m...			
180	johnb3	Article							Whole cat j... 8	8	8	august
1087	johnb2014	Loan	Rand, Ayn.	Atlas shrug...								
1171	johnb	Loan	Rand, Ayn.	Atlas shrug...								
1172	johnb	Loan	Brown, Dan...	Angels & de...								

Check In From Lending Library

Transaction Number: 68 Article Loan

ILL Number: 140185738 Library Use Only

Customer Name: john brunswick () Allow Photocopies

Delivery Location: ILL Allow Renewals

Electronic Delivery? Handle With Care

Accept Non English? Copy With Care

Accept Alternate Edition? Restricted Use

Lending String: TRNAB TRNAB

Title: Article Exchange URL: http://oc.lc/H58dKG

Author: Article Exchange Password: TYHkHPGT

Volume: Year: Inclusive Pages:

Lender String	Address N...	NVTGC	Library Name
TRNAB	1	Lending	Karal's Mac...
TRNAB	3	Lending	Atlas Training
TRNAB	4	Lending	Karal's Mac...
TRNAB	5	Lending	Karal's Mac...

Date	Note	Type	Added By
6/25/2014 11:52 AM	renewals = 21 days	Lender	System
6/25/2014 11:52 AM	Article Exchange URL: http://oc.lc/H58dKG Article Exchange Password: TYHkHPGT	Lender	System
8/22/2011 2:28 PM	PLEASE RETURN FORM WITH BOOK	Lender	System
12/15/2014 9:58 AM	Received conflicting article exchange details. New URL: http://oc.lc/ewYNk7 New Password: yNzVt4rN	System	System

Due Date: 10/04/12

Document Type:

Number of Pieces: 1 Number of Pages: 1

Notes/Special Ins.:

OCLC Status: RECEIVE_UNCONFIRMED

Partial and Incorrect Receipts



- Need help?
 - ILLiad 8.5 Documentation
 - ILLiad User Guide, Borrowing, Processing and Circulating Requests, Partial/Incorrect Items
 - Call or e-mail support

Recalls



- Issuing a Recall on OCLC to the Borrowing library
 - Open the request and go to the OCLC Ribbon
 - Click on Recall
 - A Recall notice will be sent to the other library
 - The request will stay at Item Shipped unless you move it to another queue

Delete	Receive	Not Received	Return	Undo Shipped	Recall	Yes	No	Show
Manual Options					Conditional		Request	

General Request Information

Transaction Number	1049	<input type="radio"/> Article	<input checked="" type="radio"/> Loan
Transaction Name	Lending	Service Type	
Transaction Date	2/10/2014 2:54 PM	Not Wanted After	12/13/2013
Acquisition Method		Site	
Accession Level	Regular	Shipping Options	Mail
Account		Doc Type	

OCLC Information

ILL Number	111107287
OCLC Number	52816875
Lending String	*TRNAA,TRNAA
Borrower	WCMCQ 1
System ID	OCLC 15359
OCLC Status	Record not found

Item Information

Author	Angels & demons /
Editor	Brown, Dan, 1964-
Publisher	New York ; Atria Books, 2003, c2000.

- Accept Alternate Edition
- Accept Non English
- Allow Copies?
- Copyright Already Paid?
- Allow Renewals?
- Library Use Only?
- Replacement Pages?
- Priority Shipping
- Ariel
- Odyssey (PDF Enabled)

Item Information

Call Number	
Location	
Due Date	12/13/2013
Reason For Cancellation	
Item Num/Ref Num	
ISxN	9780743486224 (hbk.)
Special Instructions	
Max Cost/Pieces	100.00IFM 1

Note	Type	Added By
/2013 2:04 PM	Borrowing Notes; (maxCost; \$100.00)	System

Citation Information

Cited In	
Title	
Date	
Volume/Pages	

Recalls



- Processing a Recall in Borrowing
 - Request will be at Awaiting Recalled Processing
 - Change the Due Date to allow time needed for return of the item
 - Click on the Send E-Mail icon and select Loan Recall
 - The customer will receive an e-mail and the request will return to Checked Out to Customer
 - Your system may behave differently depending on how your Email Routing is set up

General Request Information

Transaction Number: 227

Transaction Name: max

Transaction Date: 5/9/2013 11:15 AM

Acquisition Method: Hold for Pickup

Service Level: Regular

Account:

Article Loan

Wanted By:

Not Wanted After: 01/16/2011

Site:

Shipping Options:

Doc Type: Article

OCLC Information

ILL Number: 81291549

OCLC Number: 287605

Lending String: *WWT,WWT

Lender: TRNAB 1

System ID: OCLC

OCLC Status: Record not found

Item Info

Collections Local Holdings Imported Request User Copyright Invoice

Atlas shrugged.

Rand, Ayn.

1957

Ayn Rand

Atlas Shrugged

Accept Alternate Edition
 Accept Non English
 Allow Copies?
 Copyright Already Paid?
 Allow Renewals?
 Library Use Only?
 Replacement Pages?
 Priority Shipping
 Ariel

Item Info 1

Item Information

Call Number:

Location:

Due Date: 11/15/2012

Reason For Cancellation:

Item Num/Ref Num:

I5xN:

Special Instructions:

Max Cost/Pieces: 1

	Note	Type	Added By
2011 10:01 AM	Note new ariel address.	Lender	System
2011 10:01 AM	Received conflicting shipped message from WWT with due date of 09/24/2011	System	System
2010 2:43 PM	testestestest	User	max

Citation Information

Cited In: the dog next door

Title:

Date:

Volume/Pages:



Process

Editing

jbrunswick@atlas-sys.com

Subject: Notice of Recalled Item:

Re: maxwell brunswick

Item that is checked out to you:

Title: Atlas shrugged.

Author: Rand, Ayn.

227

Item being recalled by the library that provided it. Please return it to the library as soon as possible.

Library Loan office hours are Monday-Friday, 8am to 5pm.

Thank you for the rapid return of this item.

If you have any questions about this e-mail please contact us at jbrunswick@atlas-sys.com
office phone number is 555-1234.

Sincerely,

Maxwell Kitty Kat Brunswick
Library

Recalls



- Need help?
 - ILLiad 8.5 Documentation
 - ILLiad User Guide, Lending, Processing and Circulating Lending Requests, Processing Recalls and Lending Overdues
 - ILLiad User Guide, Borrowing, Processing and Circulating Requests, Recalling Checked Out Materials
 - Call or e-mail support

Renewals



- Responding to a request for a Renewal from a Borrowing Library
 - Request will be at Awaiting Renewal Request Processing in Lending
 - Open the request and do one of the following on the Lending Processing Ribbon
 - Select No from the Renewals group
 - Select Yes With Due Date
 - Due Date will be automatically changed
 - Change Due Date, save record, select Yes

General Request Information

Transaction Number: 1073 Article Loan

Name: Lending Service Type:

Transaction Date: 3/13/2015 4:16 PM Not Wanted After: 03/07/2014

Acquisition Method: Site:

Access Level: Regular Shipping Options: Mail

Account: Doc Type:

OCLC Information

ILL Number: 113515216

OCLC Number: 665041121

Lending String: *TRNAA

Borrower: GSE 1

System ID: OCLC 354

OCLC Status: Record not found

Item Information

[Collections](#)
[Local Holdings](#)
[Imported Request](#)
[Copyright](#)
[Invoice](#)
[Additions](#)

The importance of tyrosine as an aid in the demonstration of the present-day (

Bastian, Henry Charlton, 1837-1915.

London ; John Bale, Sons & Danielsson, 1915.

any

Original Loan Author:

Original Loan Title:

Accept Alternate Edition
 Accept Non English
 Allow Copies?
 Copyright Already Paid?
 Allow Renewals?
 Library Use Only?
 Replacement Pages?
 Priority Shipping
 Ariel
 Odyssey

Item Information

Call Number: P53535.A547 A94 2005

Location: Newman 3rd Floor AVAIL

Due Date: 3/12/2014

Reason For Cancellation:

Item Num/Ref Num:

ISxN:

Special Instructions:

Max Cost/Pieces: 1

	Note	Type	Added By
03/13/2015 9:56 AM	Billing Notes; PLEASE INCLUDE CHARGES ON ILL FORM!! FEIN #58-13517177; *IFM billing preferred	System	System
03/13/2015 9:56 AM	Borrowing Notes; Thank you	System	System

Citation Information

Cited In:

Title:

Date:

Volume/Pages:

Renewals



- Responding to a request for a Renewal from a patron
 - If the Automatic Renewals key is set to Yes the request will be at Renewed by Customer to mm/dd/yyyy
 - Click on Send OCLC Renewal Requests on the Borrowing Ribbon
 - The request will go back to Checked Out to Customer
 - If Lending library say Renewal OK, change Due Date and route back to Checked Out to Customer
 - If Lending Library say Renewal Denied, change Due Date and Recall from patron

Home Borrowing Document Delivery Lending System

User Address

Process Copyright Import Requests Print ALA Requests Send OCLC Renewal Requests

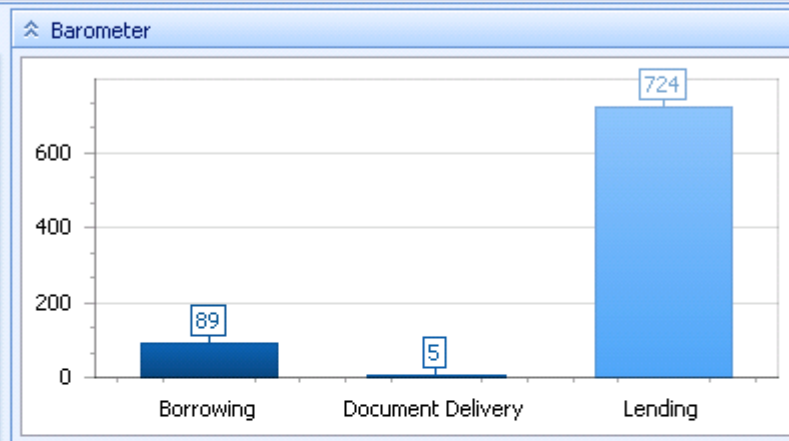
Check In From Lending Library Electronic Delivery Print Receives Contact Customers

Check Out Check In Overdues Print Returns Returns

Main

Borrowing Document Delivery Lending

Awaiting Conditional Processing	3
Awaiting Odyssey Processing	5
Awaiting Request Processing	23
Awaiting Unfilled Processing	48
Cancelled by ILL Staff	37
Checked Out to Customer	4
Delivered to Web	2
Request Finished	69
Request Sent	11
Customer Notified via Mail	2
Received Partial/Incorrect Item	1
Loans Recalled from Patrons	1
In Transit from Customer	2
Customer Notified via Phone	1
Awaiting Stacks Searching	3
Awaiting Renewal OK Processing	2
Awaiting Document Provider Processing	1
Awaiting Denied Renewal Processing	1
OCLC Special Message: Received?	12
Renewed Requests (1 items)	
Renewed by Customer to 3/31/2015	1
229	



System

Alert	B	D	L
Connection Manager	15	0	82
Odyssey Manager	0	0	4
Outgoing E-Mail	199	0	80
System Error Flags	47	0	0
Users To Clear	0	0	0
261 0 166			

Renewals



- Staff initiated renewals
 - If you do not allow automatic renewals or want to submit multiple renewals
 - Open the request
 - Click on Renew Request on the Borrowing Processing Ribbon
 - Request will go to Renewed by ILL Staff until mm/dd/yyyy and then to Checked Out to Customer without staff intervention

General Request Information

Transaction Number: 227 Article Loan

Name: max Wanted By:

Transaction Date: 5/9/2013 11:15 AM Not Wanted After: 01/16/2011

Delivery Method: Hold for Pickup Site:

Service Level: Regular Shipping Options:

Account: Doc Type: Article

OCLC Information

ILL Number: 81291549

OCLC Number: 287605

Lending String: *WWT,WWT

Lender: TRNAB 1

System ID: OCLC

OCLC Status: Record not found

Local Holdings

Atlas shrugged.
 Rand, Ayn.
 1957
 Ayn Rand
 Atlas Shrugged

Accept Alternate Edition
 Accept Non English
 Allow Copies?
 Copyright Already Paid?
 Allow Renewals?
 Library Use Only?
 Replacement Pages?
 Priority Shipping
 Ariel

Item Info 1

Item Information

Call Number:
 Location:
 Due Date: 11/15/2012
 Reason For Cancellation:
 Item Num/Ref Num:
 ISxN:
 Special Instructions:
 Max Cost/Pieces: 1

	Note	Type	Added By
2011 10:01 AM	Note new ariel address.	Lender	System
2011 10:01 AM	Received conflicting shipped message from WWT with due date of 09/24/2011	System	System
2010 2:43 PM	testestestest	User	max

Citation Information

Cited In: the dog next door
 Title:
 Date:
 Volume/Pages:

Renewals



- Need help?
 - ILLiad 8.5 Documentation
 - ILLiad User Guide, Lending, Processing and Circulating Lending Requests, Responding to Renewal Requests
 - ILLiad User Guide, Borrowing, Processing and Circulating Requests, Processing Borrowing Renewals
 - Call or e-mail support

When the problem lies elsewhere



- Sometimes it just not your day
 - Network issues
 - Problems at OCLC
 - Error at the other library
- Call the other library
 - Please update
- Call IT for local issues
- Pick up the pieces the best you can
 - May have to manually update requests

Beyond the Basics



- Need Help?
 - Documentation
 - www.atlas-sys.com, Documentation, ILLiad 8.5
 - Support for Original Licensees
 - 800-567-7401
 - service@atlas-sys.com
 - Support for OCLC Licensees
 - 800-848-5800
 - support@oclc.org

QUESTIONS?

Beyond the Basics

Thank You

