

Hand-on Practice Exercises
OCLC ILLiad Borrowing for New Licensees - Day 1

OBJECTIVE: Learn the basics of creating a patron account and placing a borrowing request in the patron web interface. *Email any problems to training@atlas-sys.com immediately for help.*

Step	Instruction	Complete? Any Problems?
1	Print the flowchart for Borrowing located here: http://www.atlas-sys.com/documentation/illiad/content/OCLCILLiadBorrowingWorkflow.pdf	
2	Find your Borrowing web page URL and visit the site on the Web using Internet Explorer. It should be something like this on a new install: http://yourservername/illiad/logon.html or http://yourservername/illiad/abc/logon.html (where abc is a shared server site code nvtgc).	
3	Go to the First Time Users page and review the text. Note any changes you want to make before you go live.	
4	Create a test account for yourself using the regular basic ILLiad authentication. (Note: You may not be able to do this if you are already in production or if your authentication system is already been implemented.)	
5	Review the ILLiad Main Menu request links. Are there request types that you want to remove or that you need to add to customize this page?	
6	Submit 3 article/photocopy test requests – be sure to note that it is a test request in the Notes area on the form.	
7	Submit 3 loan test requests - be sure to note that it is a test request in the Notes area on the form.	
8	View/Modify an article and a loan request – change something in each record and verify it saves.	
9	Cancel 2 article/photocopy requests.	

10	Resubmit one cancelled request.	
11	Change your Personal information.	
12	Login to the staff client: Review the requests that you submitted and see how they appear in the client.	
13	Go to the clear new customers screen and review your new user record. Try clearing yourself – did you receive any errors when ILLiad attempted to try to generate the email? Did you receive the email in your own email box that was specified when you registered as a new user?	