

Optional

Hands-on Practice Exercises

OCLC ILLiad Borrowing for New Licensees

Day 2 #2

OBJECTIVE: Learn the basics of searching and requesting a borrowing item on OCLC. Check off each item as you complete the tasks and note any problems. **Email any problems or questions to training@atlas-sys.com immediately for help.**

Step	Instruction	Complete? Any problems?
1	Review the flowchart for borrowing here: http://www.atlas-sys.com/documentation/illiad/content/OCLCILLiadBorrowingWorkflow.pdf	
2	Login to the OCLC ILLiad staff client.	
3	Select the Borrowing tab	
4	Double click the Awaiting Request Processing queue	
5	Select one of your test loan requests and review it.	
6	Add a test note. (Right-click the notes area at bottom and select Add Note.)	
7	Click the OCLC tab to search for the item. An auto-search may have already been done for you. If a single hit was found, you will automatically be taken to the Record Detail screen.	
8	From the OCLC Searching tab, double click the record you wish to select for the request to go to the Record Detail screen.	
9	On the OCLC ribbon at the top of your screen, click the Holdings button and choose All Holdings.	
10	In the Manual Entry for holdings symbols, type TRNAA and click Add to put TRNAA in the lending string.	
11	Click Create WorkForm and review the workform.	
12	Click Send Request button on the upper OCLC ribbon.	
13	Note the imported OCLC #, ILL Request #, Lending String	
14	Click Request Sent button on the Borrowing Processing ribbon at top of screen.	
15	Email training@atlas-sys.com the ILL# and your OCLC symbol so trainer can "fill" your request.	