

## II. LENDING ACTIVITIES

### A. Logging in to Lending

The Lending activity screens allow you to review requests and messages sent by borrowing libraries, send items requested, send messages to libraries, and check in items returned from libraries.

1.	Log in as ILL Librarian. <i>Result:</i> You will see the Home screen.
2.	Click on the blue <b>Lending</b> button on the Home toolbar on the left. <i>Result:</i> You will see the Lending screen.

### B. Daily Activities

The State Library recommends that libraries perform these In Process – Printed, In Process – Unprinted, Cancel – Pending, and Renew Pending activities outlined below daily.

#### Checking for Unanswered Requests

In this step, you will look for old pending requests that have not been answered. When new requests are batch printed by the lending library, the Latest Activity automatically changes from ILL Request to ILL Answer – Will Supply. A request should keep the ILL Answer – Will Supply answer only long enough for you to go to the shelf to pull the item or to get the item from a branch. These requests are waiting for you to do something. Clear out all the ones that are more than several days old by either answering Ship and sending the item or saying no by answering Unfilled.

1.	At the Lending screen, click on the blue <b>In Process – Printed</b> button in the Lending toolbar on the left. <i>Result:</i> You will see the In Process – Printed transaction list. The list is sorted by date with the most recent requests first.
2.	The pull slips for each of the titles in the list were printed once. That is how the request got the Will Supply answer. If you can't find the pull slip for a request, click on the Id number on the left side of the transaction. <i>Result:</i> You will see the Transaction Group History screen.
3.	Click on the blue <b>Pull Slip</b> button at the bottom of the Lending toolbar on the left. <i>Result:</i> You will see the Print screen.
4.	Click the <b>Print</b> button. <i>Result:</i> The pull slip will print.
5.	Write the word <b>Reprint</b> on the pull slip so that you will know that another pull slip for that request is floating around someplace. Hold the reprinted pull slips until the pull slips for the new ILL Requests are printed. You can look for the items and answer all the requests at once.
6.	Click on the browser <b>Back</b> button twice or right click any place on the screen, left click on <b>Back</b> two times to return to the In Process – Printed transaction list. <i>Result:</i> You are back at the In Process – Printed transaction list.

7.	Look over the In Process – Printed transaction list for a red <b>NEW</b> over a <b>Scroll and Hand</b> icon. These are new Messages sent by the borrowing library about requests. Click on the <b>Scroll and Hand</b> icon. <i>Result:</i> You will see a screen that contains information about the transaction and the Message.
8.	Read the Message. Click the blue <b>Mark as Read</b> button on the bottom of the Lending toolbar on the left. Then, click on <b>Click here to return to the transaction list</b> . <i>Result:</i> You will see the transaction list. The red NEW over the Scroll and Hand icon is gone.

### **Batch Printing Pull Slips**

- Designate one workstation and only one person at a time at your library to print pull slips to avoid confusion.
- For every pull slip that is batch printed, the Message **Answer – Will Supply – Being processed for supply** is automatically sent to the borrowing library for each, which stops the expiration clock. Will Supply means that you have printed the pull slip and are looking for the item. The answer gives you time to look for it and get it from a branch if necessary before sending the item.
- Printing the pull slips one at a time from a transaction list does *not* automatically change the Latest Activity to Answer –Will Supply, and the expiration clock keeps ticking.
- If printing is interrupted before the pull slips actually print, the system thinks the slips were printed. The requests move from In Process – Unprinted to In Process – Printed and the latest activity on each is ILL Answer – Will Supply. You may not be able to batch print the pull slips if this happens. You may have to print the pull slips one at a time from the Transaction Group History screen.

1.	At the Lending screen, click on the blue <b>In Process – Unprinted</b> button on the Lending toolbar on the left. <i>Result:</i> You will see the In Process – Unprinted transaction list.
2.	Note the number of unprinted items in the list. Click on the blue <b>Pull Slips</b> button on the bottom of the Lending toolbar on the left. <i>Result:</i> You will see the Sort Pull Slips screen with sorting options. <i>Note:</i> The State Library suggests you keep the default “sort by call number.” Call numbers print out on the pull slips and they will be in shelf order for you.
3.	Click on the <b>Print Pull Slips</b> button at the bottom of the screen. Press this button only once. <i>Result:</i> You will first see one pull slip on the screen and then eventually the Microsoft Print screen will appear. Be patient; it might take a little while.
4.	Press the <b>Print</b> button and wait. <i>Result:</i> The pull slips will begin to print.
5.	A batch printing will only print 100 pull slips at one time. If you had more than 100 unprinted requests, click on the <b>Back</b> button on your browser. At the Print screen, press the <b>Print</b> button at the bottom of the print screen again to repeat the process. Continue until you see a Message that there are no more to print. Count the pull slips

	to be sure that you printed the same number that was in the In Process – Unprinted transaction list.
6.	<p>If your printer fails and a pull slip is still visible on the screen, you can start the print job again. Click the <b>Print</b> button on your Web browser.</p> <p><i>Result:</i> The pull slips will print.</p> <p>-OR-</p> <p>If your printer fails, you can click the <b>Back</b> button on your browser to return to the Sort Pull Slips screen. Scroll down to the bottom of the screen and check the box <b>If the last batch of pull slips did not print or printed incorrectly</b>. Click on the <b>Print Pull Slips</b> button.</p> <p><i>Result:</i> The very last batch you tried to print will reprint.</p>

### Cancel Pending

1.	<p>At the Lending screen, click on the blue <b>Cancel – Pending</b> button on the Lending toolbar on the left.</p> <p><i>Result:</i> You will see a Cancel Pending transaction list. This is list of requests that the borrowing libraries want to cancel. Each line represents a request from a borrowing library.</p> <p><i>Note:</i> If there are no Cancel Pending for your library, you will see a Message “Unable to show transactions: There are no items with this status for this library.” Go to the next lending activity.</p>
2.	<p>Click on the arrow by the dropdown box on the right of each item in the list. The list gives the possible actions that can be taken on a Cancel – Pending. The list includes Cancel Reply, Message, Status Query, and Status Report. Cancel Reply is the only action that should be taken by the lending library. Highlight Cancel Reply and click on the <b>Go!</b> button.</p> <p><i>Result:</i> The Cancel Reply form comes up.</p>
3.	<p>Select yes or no, type in a note if necessary. Then click the <b>Send Cancel Reply</b> button.</p> <p><i>Result:</i> You will see a confirmation page.</p>
4.	<p>Click the blue <b>Click here to return to transaction list</b> line on the confirmation page.</p> <p><i>Result:</i> You will return to the Cancel Reply transaction list. The transaction you just answered will no longer appear on the list.</p>
5.	<p>You have the option of batch answering. If you want to answer all the items in the Cancel – Pending list the same way, use the <b>Use Defaults and Batch Process These Transactions</b> options at the bottom of the list. Click on the arrow by the dropdown box on the right of each. Highlight Cancel Reply and click on the <b>Go!</b> button.</p> <p><i>Result:</i> The Cancel Reply form comes up.</p>
6.	<p>Select yes or no and type in a note if necessary. Click the <b>Send Cancel Reply</b> button.</p> <p><i>Result:</i> You will see a confirmation page.</p>

## Renew/Pending and Renew/Overdue

1.	At the Lending screen, click on the blue <b>Renew/Pending</b> button on the Lending toolbar on the left. <i>Result:</i> You will see the Renew/Pending transaction list or a Message “Unable to show transactions: There are no items with this status for this library.” If there are no items, go to step 4.
2.	Click on the arrow by the dropdown box on the far right of each transaction to view your choice of answers. Choose the desired response (the most common action is Renew Answer) and click <b>Go!</b> <i>Result:</i> You will see the Renew Answer form when Renew Answer is chosen.
3.	Mark either yes or no and fill in the new due date. You can add text in the <b>Note</b> field. Click the <b>Send Renew Answer</b> button at the bottom of the form. <i>Result:</i> You will see a confirmation page. <i>Note:</i> Remember to renew the book in your circulation system before answering yes to a request for renewal.
4.	Click on the blue <b>Renew Overdue</b> button on the Lending toolbar on the left. Items in this list have been declared overdue by Loan SHARK and the borrowing library is requesting a renewal. Follow the directions in steps 1 through 3.

### **C. Finding Requests to Answer**

You are now ready to answer your new interlibrary loan requests. There are three access methods for answering new requests: from the In Process – Printed transaction list, Search, or Scan Mode. The three methods are described below. What you should answer follows in Section D of this chapter.

### In Process – Printed Transaction List

1.	At the Lending screen, click on the blue <b>In Process – Printed</b> button on the Lending toolbar. <i>Result:</i> You will see the In Process – Printed transaction list, arranged by date, with the oldest request first and the most recent last. Each line represents an interlibrary loan request.
2.	Find the request you want to answer, then click on the arrow beside the dropdown box next to it. Highlight the answer you want to give and click <b>Go!</b> Complete directions for answers are in Section D of this chapter. <i>Note:</i> The words in the dropdown box do not show the current Status of the request. They show actions that can be taken at this point. <i>Note:</i> You have the option of batch answering (Batch Process). However, this will rarely be used in this list.

## Search

1.	<p>At the Lending screen, click on the blue <b>Search</b> button on the Lending toolbar on the left.</p> <p><i>Result:</i> You will see the Find ILL Transaction(s) form.</p> <p><i>Note:</i> Transactions can be searched by title, author, call number, control number, ISBN, ISSN or Identifier. There are additional ways to limit your search. For answering new requests when you have the pull slips in hand, the easiest way to search is by Identifier.</p>
2.	<p>Type in the Identifier number that is found on the upper left hand corner of the pull slip in the <b>Find</b> field. Select Identifier from the dropdown box on the immediate right, and click the <b>Search</b> button.</p> <p><i>Result:</i> You will see a transaction list with the item for which you searched for. You will answer the request from this list.</p>
3.	<p>Highlight the answer you want to give in the dropdown box on the right side of the line and click <b>Go!</b> Complete directions for answers are in Section D of this chapter.</p> <p><i>Note:</i> The words in the dropdown box do not show the current Status of the request. They show actions that can be taken at this point.</p>

## Scan Mode

If you have a barcode scanner attached to your computer, you can answer requests with fewer steps than the first 2 methods.

1.	<p>At the Lending screen, click on the blue <b>Scan Mode</b> button on the Lending toolbar on the left.</p> <p><i>Result:</i> You will see the Scan Mode screen with a new set of blue buttons in the left toolbar. The third through ninth buttons are answers that can be given to requests by scanning. Complete directions for answers are in Section D of this chapter.</p>
2.	<p>Click on the button for the answer you want to give to a request, for example, <b>Ship</b>.</p> <p><i>Result:</i> A form appears with the title Ship, the words Scan barcode on the left side of the pull slip and then a box. At the bottom of the form you will see a box and the phrase <b>Check box to bypass the details form</b>.</p> <p><i>Note:</i> When you chose the <b>Ship Loans</b>, <b>Ship Copies</b>, or <b>Check In</b> buttons, the form that appears has a box and the text <b>Check box to bypass the details form</b>. Bypassing the details form makes the answering process faster. Seeing the form helps prevent errors in answering.</p>
3.	<p>Scan the barcode on the left side of the pull slip. If the scanning doesn't work for some reason, you can type in the numbers below the barcode and press <b>Enter</b> on your keyboard.</p> <p><i>Result:</i> If you checked the box to bypass the details form, you will see a confirmation page. Your action is completed. If you unchecked the box to bypass the details form, you will see the details form.</p>
4.	<p>Scroll to the bottom of the details form and click the <b>Ship Item</b> button at the bottom of the form.</p> <p><i>Result:</i> You will see a confirmation page.</p>

## D. Answering New Requests

Most newly printed, ILL Answer – Will Supply requests will be answered either Unfilled or Ship. Occasionally a lending library might answer Hold Placed or Retry. You can also send a Message.

### Unfilled

If you cannot send a requested item within the next day or two because it is in circulation, it is missing, or for some other reason, answer the request Unfilled.

1.	Find the request you want to answer by one of the methods in Section C of this chapter. Select the Unfilled answer and click <b>Go!</b> or scan the left barcode on the pull slip. <i>Result:</i> You will see the Unfilled form.
2.	Select the reason from the dropdown box and click the <b>Send Answer</b> button at the bottom of the form. <i>Result:</i> You will receive a confirmation page. <i>Note:</i> Once you have answered Unfilled, you do not have to do anything with the request again. You do not need to keep the pull slip. <b><i>Warning: Once you answer Unfilled, don't send the book to the borrowing library. The request has already moved on to the next library. If you send the book, the borrowing library will get two copies of the book.</i></b>

### Ship

If you are sending the requested item, you will answer Ship. Answer Ship only when you have the item in your hand, ready to ship. If the item is at a branch, leave the answer Will Supply until it has arrived at your office, ready to ship. Be sure that the pull slip is in the item and that you have correctly matched the pull slip to the item before answering.

1.	Find the request you want to answer by one of the methods in Section C in this chapter. Select the Ship answer and click <b>Go!</b> or scan the left barcode on the pull slip. <i>Result:</i> You will see a Ship Form (unless you selected “bypass detail” in Scan Mode).
2.	Look over the fields in the form and make any changes and additions necessary. <ul style="list-style-type: none"><li>• The default <b>Shipped Service Type</b> is Loan. If you are shipping a non-returnable copy, click on the arrow on the dropdown box and select Copy non returnable.</li><li>• If you want to put conditions on the loan, click on the arrow on the <b>Conditions</b> dropdown box and highlight the condition.</li><li>• If the item is to be insured, fill in that information. This will rarely be used, and arrangements should be made with the borrowing library first.</li><li>• Uncheck the <b>Renewable</b> field if the item cannot be renewed.</li><li>• The due date is system generated. If it is incorrect, fill in the correct due date.</li><li>• You may add a note if you have additional information.</li><li>• Click on the <b>Ship Item</b> button at the bottom of the form.</li></ul> <i>Result:</i> You will see a confirmation page.

3.	Write the due date on the pull slip that is shipped with the item. Fold the slip so that both barcodes can be scanned without unfolding. Place the pull slip in the item and ship.
	<b><i>Warning: If you see that the request has already been answered Unfilled, don't send the book anyway. Once you have answered Unfilled you cannot answer Ship. The request has already moved on to the next library. If you send the book, the borrowing library will get two copies of the book.</i></b>

### **Hold Placed**

In most cases you will answer Unfilled if your copy of the requested item is in circulation. However, if your library is at the end of the Lender String and the requested item is unique to Louisiana libraries, you might answer Hold Placed. The item might not be available from an out-of-state library. Placing a hold may be the only chance for the borrowing library's patron to get the item.

1.	Place a hold in your circulation system for the requested item. Be sure to save the pull slip so that you can send the pull slip with the item when it becomes available.
2.	Find the request you want to answer by one of the methods in Section C of this chapter. Select the Hold Placed answer and click <b>Go!</b> or scan the left barcode on the pull slip. <i>Result: You will see a Hold Placed form.</i>
3.	Fill in the Estimated Date Available and add a note if necessary. Click the <b>Send Answer</b> button at the bottom of the form. <i>Result: You will see a confirmation page.</i>

### **Retry**

If you get a request for an item that has no call number on the pull slip and you do not own it, check the Lender String. If you determine that it is a Manual Request that was sent to all libraries by mistake, you might answer Retry. The Retry answer ends the request at your library. The borrowing library can then resend it correctly to the intended library or libraries.

1.	Find the request you want to answer from the In Process – Printed transaction list or Search by Identifier. Click on the <b>Id</b> number on the left side of the transaction. <i>Result: You will see the Transaction Group History screen.</i>
2.	Click on <b>Click Here to View the Lender String.</b> <i>Result: You will see a list of lenders for the request. The libraries whose names have a line through them have not supplied the material. The request is currently at the library whose name is in red. The remaining libraries have not seen the request yet.</i>
3.	Close the Lender String screen by clicking on the <b>X</b> in the upper right corner of the screen. If you determine that the request is an incorrectly sent Manual Request, go to step 4.

4.	Select the Retry answer in the dropdown box on the far right of the transaction and click <b>Go!</b> . <i>Result:</i> You will see the Retry form.
5.	Select Other from the dropdown <b>Reason</b> box, type in the reason in the <b>Answer Note</b> box and click the <b>Send Answer</b> button. <i>Result:</i> You will see a confirmation page.

### **Message**

Sending a Message doesn't change the Status of a request. It alerts the borrowing library that you have new information or a question. This should be used sparingly because it slows the process down.

1.	Find the request you want to answer from either the In Process – Printed transaction list or in Search. You can't send a Message from the Scan Mode. Select Message in the dropdown box on the right and click <b>Go!</b> <i>Result:</i> You will see the Message form.
2.	Type your Message in the box and click the <b>Send Message</b> button at the bottom of the form. <i>Result:</i> You will see a confirmation page.

**Note:** You will see that other answers are built into the system. However, the State Library asks that the remaining answers not be used by libraries. Do not use the Conditional, Estimate, Status Query and Status Report answers.

### **Shipping Hold Placed Items**

1.	When the reserved item is ready to send to the requesting Loan SHARK library, check the item out in your circulation system then stamp or write the due date on the pull slip.
2.	At the Lending screen, find the request you want to answer by one of the methods in Section C. Select the Ship answer in the dropdown box on the right and click <b>Go!</b> or scan the left barcode on the pull slip. <i>Result:</i> You will see the Ship Item form (unless you have chosen "bypass detail" in the Scan Mode).
3.	Make desired changes in the Ship Item form and add a note if necessary. Click the <b>Ship Item</b> button at the bottom of the page. <i>Result:</i> You will see a confirmation page.
4.	Fold the slip so that both barcodes can be scanned without unfolding. Put the pull slip in the item and ship.
5.	Interlibrary loan staff should periodically check requests in the In Process – Printed transaction list with Hold Placed as the Latest Activity. You can sort the list by Latest Activity to group all the Hold Placed transactions together. Click on the highlighted/underlined <b>Latest Activity</b> column heading. <i>Result:</i> The Transaction list sorts and is now arranged alphabetically by Latest Activity.

6.	Look at each transaction that has Hold as the Latest Activity. Is the item long overdue or lost? Did the item get put back on the shelf without being sent to the Loan SHARK borrowing library? Take any necessary actions required by the circumstance.
7.	If, after placing a hold on an item, you find that the book can't be sent for some reason, go back into Loan SHARK and change your answer from Hold Placed to Unfilled. Follow steps 2 and 3, above but answer Unfilled instead of Ship. <i>Result:</i> You will see a confirmation page.

## E. Other Lending Activities

### Check In Returned Items

The borrowing library will answer Receive in Loan SHARK when they get your item, and then answer Return when they send the item back to you. When you receive the item back at your library you will “check it in” in Loan SHARK.

1.	At the Lending screen, find the transaction record for the item by using one of the methods in Section C of this chapter. <i>Note:</i> If the item was returned to you without a pull slip, searching by title will be the easiest way to find the transaction. Select the Check In answer in the dropdown box on the right and click <b>Go!</b> or scan the left barcode on the pull slip. <i>Result:</i> The Check In Form appears (unless you are in Scan Mode and have chosen to skip the details form).
2.	You have the option of sending a Message to the borrowing library. Click the <b>Check In Item</b> button at the bottom of the Check In form. <i>Result:</i> You will see a confirmation page.
3.	Remember to also check in the item in your library's circulation system.

### Recall

After the lending library ships an item, it can be recalled from the borrowing library before the due date.

1.	At the Lending screen, find the request you want to recall one of two ways: <ul style="list-style-type: none"> <li>• Click on the blue <b>Shipped Loans</b> button on the Lending toolbar on the left. Find the transaction line for the item you want to recall. This is not the most efficient way to find the book because you will have many items in your Shipped list.</li> <li>• Click on the blue <b>Search</b> button on the Lending toolbar on the left and search for the transaction by title. When searching by title, the punctuation and spelling must be exactly the same as in the request. Sometimes it is best to type in the first few words of the title and select from the resulting list.</li> </ul> Once you have found the transaction, highlight Recall in the dropdown box on the right, and then click the <b>Go!</b> button. <i>Result:</i> You will see the Recall form.
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2.	You can add text in the <b>Note</b> field, and then click the <b>Recall Item</b> button at the bottom of the form. <i>Result:</i> You will see a confirmation page.
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## F. Weekly Activities

### Checking the Return Pending Transaction List

Returned Pendlings are loaned items for which the borrowing library has sent the Returned Message or the system has declared the item overdue. The Return Pending list allows you to see what items should be arriving soon from the borrowing library.

1.	At the Lending screen, click on the blue <b>Return Pending</b> button on the Lending toolbar on the left. <i>Result:</i> You will see the Return Pending transaction list.
2.	If several weeks have passed since the item was answered Returned by the borrowing library, check your circulation system and the shelves to see if the book was returned and placed on the shelves without being Checked In in Loan SHARK. If that is the case, Check In the book in Loan SHARK to complete the transaction, following the directions in step 3.
3.	Select the transaction you want to answer. Highlight Check In in the dropdown box on the right of the transaction and click the <b>Go!</b> button. <i>Result:</i> You will see the Check In Item screen.
4.	Click the <b>Check In Item</b> button at the bottom of the screen. <i>Result:</i> You will see a confirmation page.
5.	If the item has not been received back at your library, you should check with the borrowing library. <ul style="list-style-type: none"> <li>• You can send a Message about the request by selecting Message from the dropdown box on the right of the transaction and click the <b>Go!</b> button. The Message form appears. Type your Message in the box and click the <b>Send Message</b> button.</li> <li>• You may also send an email directly to the borrowing library asking about the item. A list of email addresses for Loan SHARK libraries can be found at <a href="http://www.state.lib.la.us/Dept/UserServ/LS/contacts.htm">http://www.state.lib.la.us/Dept/UserServ/LS/contacts.htm</a>. Be sure to include the Identifier number to help the borrowing library locate the transaction.</li> </ul>

### Checking Other Transactions

At least once a week you should check the Shipped, Lost and Recall transactions for new Messages from borrowing libraries. You will know that there is a new Message by the red NEW above the Scroll and Hand icon.

1.	At the Lending screen, click on the blue <b>Shipped, Lost or Recall</b> button on the Lending toolbar on the left. <i>Result:</i> You will see a transaction list.
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2.	At each <b>NEW</b> Message in the selected transaction list, click on the <b>Scroll and Hand</b> icon to read the Message. <i>Result:</i> You will see the Message Information screen.
3.	Click on the blue <b>Mark as Read</b> button on the Lending toolbar on the left. <i>Result:</i> The red NEW will be removed from above the Scroll and Hand icon.
4.	Take whatever action is appropriate.