

## ILLiad for Library Staff – Info and Examples

### **FOR QUESTIONS OR PROBLEMS, CALL ILL AT 3829, 3830, OR 3552 BEFORE MAKING ANY CHANGES TO ITEM RECORDS OR CUSTOMER ACCOUNTS.**

#### ILLiad Basics

- ILL materials have red labels. Red labels are to stay on the item at all times.
- Library staff use Carl X to receive, check out, and check in ILL materials the same way as other holds.
- Customers receive notifications via their chosen Carl X medium (text message or email) when their ILL materials arrive, if the hold was canceled, and when ILLs are coming due.
- If a customer requests an item that cannot be obtained, the account they submitted the request on will be notified via email along with a reason. If it is a personal account, it will be their email address. If the library submits the request, it will be via the submitting library's email address and the customer will not be notified any other way.
- ILL materials check out for 3 weeks with **no renewals**.
- ILL fines are 50 cents per day with a \$30 maximum.
- Customers may submit as many requests as they want, but no more than 5 requests per customer per week will be processed.
- Customers are responsible for lost or damaged ILLs.
  - The minimum amount for a lost or damaged ILL is \$45.00.
  - **NEVER** claim or trace an ILL. Contact ILL if a customer insists they returned an item.
- Only Primary and Annual Fee cardholders are eligible for ILL service.
- Check the patron's account status before submitting requests. Over threshold or ineligible accounts will not be allowed to use ILL services.

#### Important Things You Need to Know

- ILL staff works Monday-Friday 7:30-5:30. ILL staff is not available on weekends.
- For questions, comments, etc., email [interlibraryloan@metrolibrary.org](mailto:interlibraryloan@metrolibrary.org), or call 3830, 3829, or 3552.
- ILLiad website: [metrolibrary.org/ill](http://metrolibrary.org/ill)
- ILLiad has a separate login from Metro accounts. ILLiad cannot be accessed except through the website above.
- ILL **does not** request items that Metro already owns, has ordered, or is processing. ILL staff may make an exception to this policy at their discretion if an item is non-circulating, i.e., in the Oklahoma Room or a reference item. Items with all copies lost can be requested.
- Requests can be tracked via the ILLiad website for both personal and library accounts in the account the request was submitted from.
- When submitting requests via a library account, please include the customer's last name and card number in the notes field. (Ex. Smith 12345678) Requests cannot be processed if this information is absent.
- If a customer forgets their password, they can reset their password by clicking on the "Forgot Password" link on the ILL website. A reset link will be sent to the email associated with their ILL account. There is no need to create another account. Duplicate accounts will be cancelled.
- ILL staff do not know customer passwords and cannot access customer accounts.
- If submitting from a library account, you **MUST** use the account for the branch the customer wants to pick the item up from. For example, if you are at Almonte and they want to pick the item up at Warr Acres, you **MUST** submit the request from the Warr Acres account. See page 2 for library login information.
- If ILL cannot obtain an item, customers are free to re-submit requests. Please note if this is a second, third, fourth, etc. attempt when submitting the request.
- **Do not edit or delete ILL item records for any reason.**



New users will click “First Time Users Click Here”

If a customer clicks “Forgot Password,” an email to the email associated with their ILL account will be generated.

**YOU MUST SUBMIT A REQUEST FROM THE LIBRARY ACCOUNT THE CUSTOMER WANTS TO PICK THE ITEM UP FROM!**

Library account username: [Library Code]-ILL Example: DN-ILL

Library account password: ill[street address numerals] Example: ill300

Library	Username	Password
AL	AL-ILL	ill2914
BE	BE-ILL	ill6700
BI	BI-ILL	ill5501
CH	CH-ILL	ill327
CT	CT-ILL	ill2525
DC	DC-ILL	ill4330
DN	DN-ILL	ill300
ED	ED-ILL	ill10
HR	HR-ILL	ill1930
JN	JN-ILL	ill9295
LU	LU-ILL	ill310
MC	MC-ILL	ill8143
NP	NP-ILL	ill2240
NW	NW-ILL	ill5600
RE	RE-ILL	ill2000
SO	SO-ILL	ill6900
VI	VI-ILL	ill10307
WA	WA-ILL	ill5901
WR	WR-ILL	ill2101

### Step-By-Step ILL Guides

**FOR QUESTIONS OR PROBLEMS, CALL ILL AT 3830, 3829, OR 3552 BEFORE MAKING ANY CHANGES TO ITEM RECORDS OR CUSTOMER ACCOUNTS.**

#### Submitting an ILL

1. Is the account eligible for ILL service? Only Primary and Annual Fee customers with accounts in good standing may use ILL
2. Does Metro already own the item? Thoroughly check the catalog AND Carl X. Owned, ordered, or items in process should not be requested through ILL. Items with all copies lost can be requested.
3. What branch does the customer want to pick the item up from?
4. Log in to ILL at [metrolibrary.org/ill](http://metrolibrary.org/ill). You MUST log in to the branch that the customer wants to pick the item up from. This information is found on page 2.
5. On the left side of the screen, choose the type of material the customer wishes to borrow.
6. Fill out the request form. All items with an asterisk (\*) are required. YOU MUST GIVE THE CUSTOMER'S LAST NAME AND CARD NUMBER IN THE NOTES FIELD. (Ex. Smith 12345678)
7. Click submit to send the request to ILL.

#### Receiving an ILL

1. ILLs MUST be received in Carl-X at the library or customers will not get a notification that their item has arrived.
2. When the item arrives at your library, open Carl X.
3. Click "Return."
4. There are two barcodes on the red label. Scan the TOP/LONGER barcode on the red label. This generates the notice to the customer that their hold has arrived.
5. Place the item in your designated ILL hold place.

#### Returning an ILL OR If an ILL is not picked up by the end of the 7-day hold period

1. Make sure ALL pieces are with the item. If a piece is missing DO NOT CHECK THE ITEM IN and contact the customer immediately.
2. Open Carl X.
3. Click the "Return" option.
4. Scan the TOP/LONGER barcode.
5. Using a pen or Sharpie, cross out the two-letter library code (i.e., BI, DN, etc.) and write ILL on BOTH the front and spine of the red label. DO NOT MARK THROUGH THE BARCODE.
6. Return to ILL via interoffice envelope or your branch's appropriate bin.

#### If a customer acknowledges they lost/damaged the ILL and need to pay:

1. Pay \$45 at that time and be done with it.
  - a. Branch staff will add a manual fee with the ILL item number listed.
2. If a customer wants to pay later, they will be responsible for the full price of the item, even if it's over \$45
3. After the customer pays for the item, library staff are to notify ILL with customer information and ILL item number
  - a. ILL staff will process and remove from card

#### If an ILL goes lost on its own:

1. ILL will reach out to the owning library for the invoice
2. ILL staff will reach out to Manager of Access to
  - a. Add a special stop
  - b. Add the price to the customer's account

## ILLiad Main Screen

Choose an option from the choices below.

Logoff  
crazydinosaur

Main Menu

New Request

- \* Book
- \* Genealogy
  - \* Books, etc.
  - \* Copies
- \* Video Recording
- \* Spoken Recording
- \* Music Recording
  - \* Copies
  - \* Other

View

- \* All Requests

Tools

- \* Change User Information
- \* Change Password

About ILLiad

FAQs

Transaction	Type	Title	Author	Status
<a href="#">12585</a>	Video	Miracle mile		Request Sent
<a href="#">12588</a>	Video	Dwight Macdonald on movies.	Macdonald, Dwight.	Request Sent.
<a href="#">13083</a>	Video	Closet land		Request Sent.
<a href="#">13084</a>	Video	Lolita		Request Sent

Subscribe to Alerts Feed

No Alerts

If the Metropolitan Library System does not own a title you are looking for, you are invited to request to borrow it through interlibrary loan. To make your request, please click on one of the "New Request" links. Be sure to include as much information as possible about the title. We are happy to forward your request to libraries that might lend the title. Please know that we will do everything possible to borrow the title for you. Due to other libraries' interlibrary loan policies, we are unable to borrow every title requested.

The library is unable to borrow materials of the following types:

- Playaway
- Playaway View
- Software/Computer discs
- Vinyl records

If the library is able to borrow the material, it will be sent to your preferred library. You will receive notification of its arrival by mail or email. If you have questions about other subjects found at the library, please try our [Ask a Librarian](#) service. If you have questions about our interlibrary loan service, please [click here](#). For tips to increase the likelihood of receiving requested materials, please [click here](#).

This is the ILLiad main screen. It is the same for library and customer accounts and shows each request along with its status. Statuses do not update automatically to "checked out" when the item is checked out. ILL manually updates this status daily, so it may not appear until the next working day.

Possible statuses for items are:

- Checked Out to Customer
- Cancelled by Customer
- Cancelled by ILL Staff – ILL will not/cannot borrow the material for the customer.
- Request Finished – Item has been shipped back to owning library OR request cannot be completed.
- Awaiting Request Processing – Request is ready to be processed by ILL staff.
- Awaiting Evaluation for Purchase – MSL is evaluating the item for purchase.
- Request Sent – ILL staff has sent the request, usually to 5 libraries.
- Awaiting Post Receipt Processing – Item is either on its way to ILL from the owning library or awaiting staff processing.
- In Transit to Pickup Location
- Awaiting Return Label Printing – Item is about to return to the owning library.

## Sample Book Request

Book Request

To request genealogical resources, please select the Genealogy link at left.

\* Indicates required field

Enter information below and press the Submit Information button to send.

### Describe the item you want

Materials that are currently available at Metropolitan Library System are not borrowed, even if the available copies cannot be checked out. Please see local library staff for options.

<b>*Author/Editor(s)</b>	<input type="text" value="Wouk, Herman"/>
<b>*Title</b> <small>Please do not abbreviate unless your citation is abbreviated</small>	<input type="text" value="The winds of war"/>
<b>*Date of Publication</b>	<input type="text" value="1971"/>
<b>*Amount you are willing to pay to borrow this item (if necessary)</b> <small>You will only be charged if it is not possible to borrow the item for free. If not willing to pay, please enter 0.</small>	<input type="text" value="0"/>
<b>Edition</b>	<input type="text"/>
<b>Will you accept an alternate edition of this item?</b>	<input type="text" value="Yes"/>
<b>Do you want to borrow this item even if you cannot take it out of the library?</b>	<input type="text" value="Yes"/>
<b>ISBN (if known)</b> <small>If given will speed processing</small>	<input type="text"/>
<b>OCLC Number (if known)</b>	<input type="text" value="25961583"/>
<b>Type of Print</b> <small>Selecting Large Print <b>only</b> means that you will not receive the item if it is not available in large print.</small>	<input type="text" value="Regular Print"/>
<b>Additional Information</b> <small>Put any information here that may help us find the item.</small>	<input style="background-color: yellow;" type="text" value="Atkins 04158458&lt;br/&gt;All MLS copies withdrawn"/>

ALL FIELDS WITH AN ASTERISK (\*) ARE REQUIRED.

If using a library account, please give the customer's last name and full library card number. (Ex. Smith 12345678)  
Failure to provide this information will result in the request being canceled.

If you need to add a note other than the name and card number, hit "enter" and type the note on a separate line.

### New User Registration Screen

**New User Registration for ILLiad** \* Indicates required field

\*First Name

\*Last Name

\*Library Card Number

\*Primary Address

Address Line 2

\*City

\*State

\*Zip

\*Daytime Phone

Mobile Phone

\*Preferred Notification Method

If you select E-Mail, you MUST provide an e-mail address in the following field.

\*E-Mail

\*Preferred Pick-Up Location

\*Choose a Username

Case sensitive

\*Choose a Password

Case sensitive

\*Re-enter Password

Case sensitive

**Submit Information**

All fields with an asterisk (\*) are required.

Notifications will only be sent via email or snail mail.

ILLiad notifications are NOT the same as Carl X notifications.

If a customer declines email, they may put “no email” in the box. However, all notifications will then be sent via snail mail.