

Resource Delivery – Interlibrary Loan

ILLiad Lender Address Update Instructions

Introduction: In ILLiad, the Lender address is used for multiple purposes. One of the primary purposes is to create mailing labels or courier labels for lending or borrowing returns. The email fields are used for sending notices to the library, the Odyssey Address is used for sending articles electronically and autoformatting the Bookeye scanner from the pull slips. The Groups are used for running activity reports and charging. The Priority shipping box tells the system to print courier labels instead of regular mailing labels.

Courier information is placed in the following fields: Phone, Fax and Ariel Address. Phone is the type of service (i.e.: Texshare, TAE or SEPLSO), Fax is the site number (i.e.: 123) and Ariel Address is the Hub (i.e.: DAL or HOU)

Library information is located in the Policies Directory or for non OCLC libraries, via the WWW. Courier information is available at the Amigos Library Services Participating TAE Libraries website https://www.amigos.org/node/137/3.

The library can be searched in ILLiad by Symbol, Name or keyword in the Address fields from the Main -ILLiad Client screen

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Enter the symbol/name/location to find the library information screen you want to edit.

Symbol	IUA	
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* Note: leaving all fields blank and clicking on the search icon (Magnifying Glass) to the right of the lender Search Addresses (far right, top of screen) will bring up a display of all libraries.

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Clicking on the Policies directory icon

Will open the OCLC Policies Directory.

* Note: This will open in a new window.

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* Note if you drag the window left/right, it will dock the window to fill half of the screen (or Win+Left/Right arrows: Dock the window to each side of the monitor.). You can do one to the left and one to the right and then copy and paste information from the policies directory

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General Information

Library Name – Library Name – ILL

Phone – Telephone number

Fax – Fax number

* Note: if courier location Use courier address information as indicated below.

** Note: Use the departmental Telephone and Fax number. Otherwise use the General or Lender number as listed in the Contacts in the OCLC Policy Directory.

If Courier (Trans-Amigos Express) modify the following fields:

Library Name – Library Name – ILL <TExpress # Hub> (example: < TExpress 121 DAL>) Phone - type of service (i.e.: Texshare, TAE or SEPLSO) Fax - site number (i.e.: 123) Ariel Address - Hub (i.e.: DAL or HOU)

Odyssey Address - if available from OCLC Policy Directory Trusted Sender – Checked Override Outgoing – Leave Blank Override Trusted Sender – Leave Blank Ariel Address – Leave Blank (Unless courier) Borrowing Department Email – Email address Lending Department Email – Email address * Note: Use the departmental email address if available for both fields. Otherwise use the appropriate address as listed in the Contacts in the OCLC Policy Directory.

Shipping Information

Address1 – Institution Name Address2 - Address / P.O. Box Address3 – City, State Zip code

* Note: If the institution is a library, use the following configuration Library Name – Interlibrary Loan Address1 – Any Town Public Library

Priority Shipping – Click on box (Check mark should display)

Select the shipping method Default Shipping Loan – Select the appropriate method from the dropdown box Default Shipping Article - Select the appropriate method from the dropdown box

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Billing Information

Billing Address – Same

* Note: if Billing Address is different from the institution's address enter the billing address instead as listed in the Contacts in the OCLC Policy Directory or lending request.

Odyssey

TExpress

Article Billing Category - Varies Loan Billing Category - Varies

Odyssey

TExpress

* Note: The billing categories are either Exempt or Default. If the library is a member of one of UTA's free lending consortiums, enter Exempt. If they have no agreement with UTA for free lending enter Default. If you do not know, ASK YOUR SUPERVISOR.

Copy Charge – 12.00 Loan Charge – 15.00

Billing Methods will be IFM or Invoice. If the library is a member of OCLC's Interlibrary Fee Management system use IFM. If they are not enter Invoice.

Billing Method – Varies Copyright Payer – Blank Docline EFTS - Blank Override IFM - Blank

Groups

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Home					4
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General Information			Shipping Information		Groups
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Library's affiliated with OCLC groups are listed on the Profile page of the OCLC Policies Directory page of the library near the bottom of the Summary information (Scroll Down). List of OCLC Groups: <u>https://www.oclc.org/worldshare-ill/features/groups.en.html</u>

Free (Exempt) Groups UTA is a member of

ILLiad Group Name: OCLC Code – OCLC Group Name

Amigos: AMGS - AMIGOS RESOURCE SHARING AGREEMENT Amigos Western / BCR: AMBC - AMIGOS WESTERN RESOURCE SHARING AGREEMENT (AMIGOS/BCR AGREEMENT) AMINET: SW@P – AMINET LVIS: LVIS - LIBRARIES VERY INTERESTED IN SHARING MALAMIGOS: MAGO - MALAMIGOS TAE-KANSAS: TAKE - TAE-KANSAS **TAE-MOBIUS: TAEM - TAE-MOBIUS** Texas Group: TX@G - TEXAS GROUP Texas Statewide ULS: UTXL - TEXAS STATEWIDE ULS **TExpress:** TAEX - TRANSAMIGOS EXPRESS COURIER GROUP WACO ULS: BWUL - WACO ULS West Texas ULS: WXEU - WEST TEXAS ULS Reciprocal Agreement: - Individual free sharing agreements Government: - Free lending to State and Federal Libraries Rapid Reciprocal: - Libraries that participate in RapidILL free reciprocal resource sharing

Other Groups

Reciprocal Faculty Borrowing Program: RFBP - RECIPROCAL FACULTY BORROWING PROG - Faculty may borrow in person from another library if they have a card from Circulation.
 US NEWSP PROG - Centralized Nnewspaper collection site and microfilm creation
 Texas Libraries – Libraries in Texas (In State)
 International – Libraries outside the U.S. and its protectorates
 Corporate – Business Libraries (Fees Apply)

<u>Notes</u>

Double click in the white area of the Notes field. A pop-up window will appear.

Type "Updated" in the white area and click Add.

Add Note	*
Recent notes	•
Updated	▲
	-
	Add Cancel

* Note: after the first time you enter the note, your note is saved under "Recent notes" and can be retrieved by clicking on the down arrow to the right of the "Recent notes" field.

Add Note	
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	Add Cancel

This will add a note to the "Notes" field on the record with your name and Date.

Notes					
Date	Note	Added By			
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5/19/2016 2:19 PM	Updated	Troy			
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Before leaving the site, save the record by clicking on the disk icon in the upper left hand corner of the screen.



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If you have any questions, ASK YOUR SUPERVISOR!