Out-of-System ILL in Leap

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INTRODUCTION

Leap provides staff with a separate process for managing out-of-system interlibrary loans. The process can be managed from three places:

- The patron record
- The ILL request record
- The Request Manager

Staff may manage requests from their preferred workform. However, note that you are not able to print hold slips or wrappers from the Request Manager when trapping a hold.

For the remainder of this document, the term “ILL” is shorthand for non-CCS interlibrary loans.

The ILL process consists of the following steps:

1. Placing an ILL request (or, placing a hold and converting to an ILL request)
2. Exporting the request (this step is optional)
3. Receiving the request
4. Returning the request
5. Deleting the request

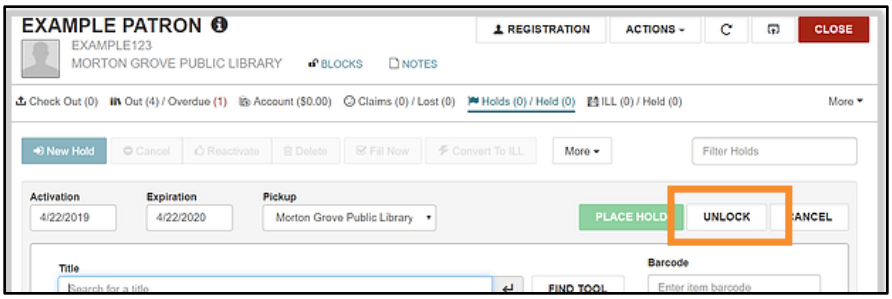
PLACING AN ILL REQUEST

In order to place an ILL request, staff must first create an Unfillable hold. Staff will then convert the Unfillable hold to an ILL request.

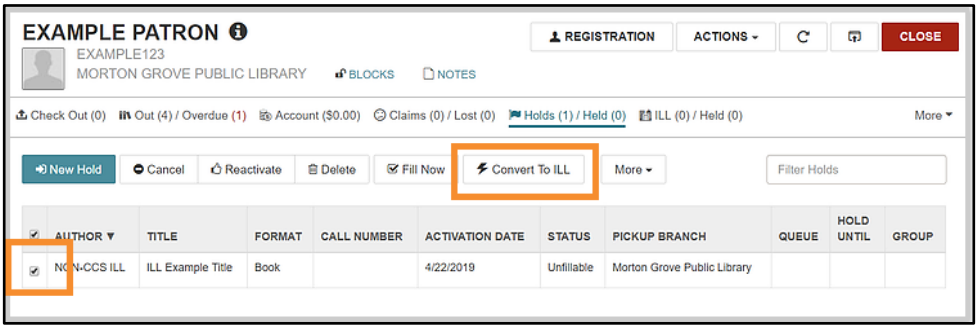
1. Open the patron’s record.
2. Navigate to the patron’s Holds/Held tab.
3. Select **New Hold**.

4. Select **Unlock**.

a. Unlocking the request will unlock the bibliographic info fields and allow staff to enter in the appropriate information. Normally, these fields are not able to be modified. Staff should not use the Unlock feature when placing intra-CCS requests because if the information in the data fields does not match a bibliographic record, the request will not attach itself to a title.



5. Enter in the request information.
   a. Libraries can decide how they would like to manage these fields. There are two important considerations.
      i. Staff are able to use the fields as they wish. This means they do not have to enter the author info in the author field, or the ISBN in the ISBN field. They may use these fields according to what works best for local workflow. For example, they can use the Author field to display the OCLC number.
      ii. These fields may not be edited once the request has been placed!
   b. Staff may enter optional Notes for the request.
      i. Notes may be added to the request record up until the hold has been Received.
6. Place the hold. The hold status will be Unfillable.
7. Select the hold and select **Convert to ILL**.
8. Once converted, the hold will move to the patron's ILL/Held tab and will have a status of Inactive.



(Optional) EXPORTING THE REQUEST

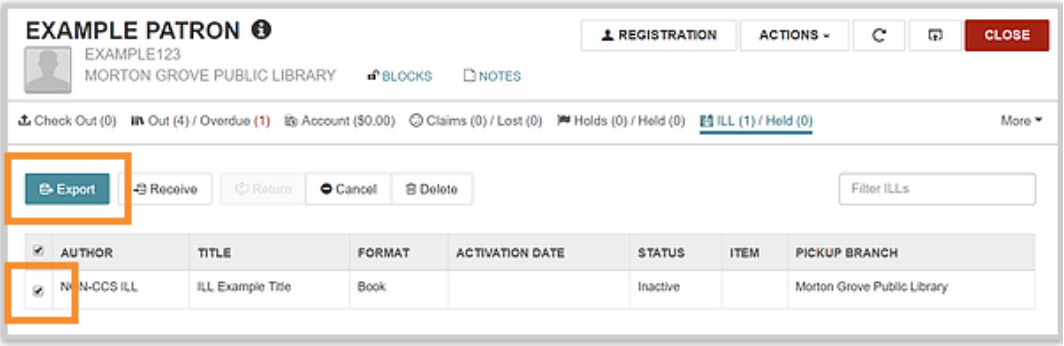
Libraries may choose to Export an ILL request if they wish to change the status of the request from Inactive to Active, either to have the latter status display to patrons or to signify a certain

point in local workflow. The only action taken when Exporting is the request status change from Inactive to Active.

For libraries whose OCLC accounts are integrated with Polaris, the Export option will send the request to the library's OCLC review file and change the request's Polaris status to Active. At this time, CCS libraries are not integrated with OCLC. Exporting the request will not send the request to the library's OCLC account. It will, however, still change the request's Polaris status to Active.

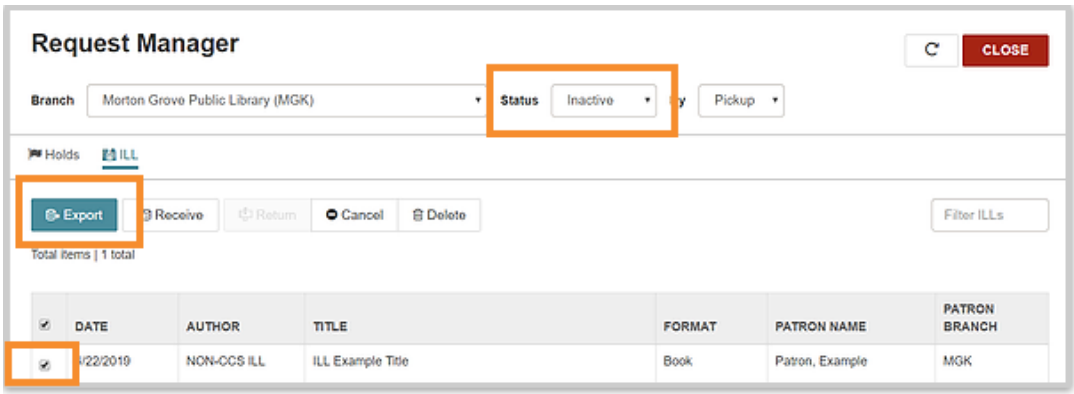
To change the status of an ILL request record from Inactive to Active in the patron's record:

1. Navigate to the ILL/Held tab.
2. Select the checkbox next to the Inactive ILL request record.
3. Click Export



To change the status of an ILL request record from Inactive to Active in the Request Manager:

1. Select the **ILL tab** to view ILL requests. If needed, change the status to Inactive.
2. Select the checkbox next to the ILL request record.
3. Click **Export**.



To change the status of an ILL request record from Inactive to Active in the request record:

1. Locate and open the ILL request record.
2. Click **Actions**.

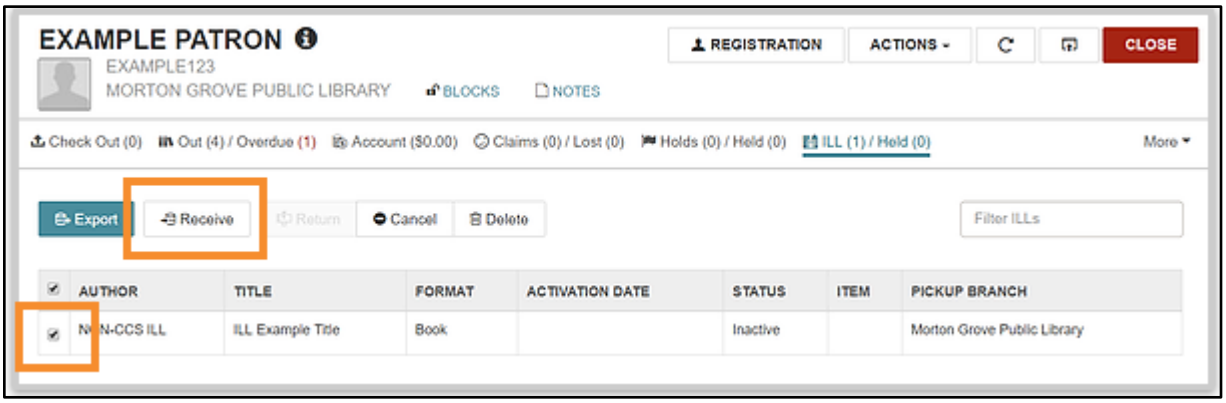
3. Click **Export**.

RECEIVING THE REQUEST

When the requested item arrives at the library and is ready to be trapped for the patron, staff will need to mark the request as Received. As mentioned earlier, staff can Receive the reqeust from the patron's record, the Request Manager, or the ILL request record. However, hold slips and wrappers will not print from the Request Manager.

To Receive the request from the patron's record:

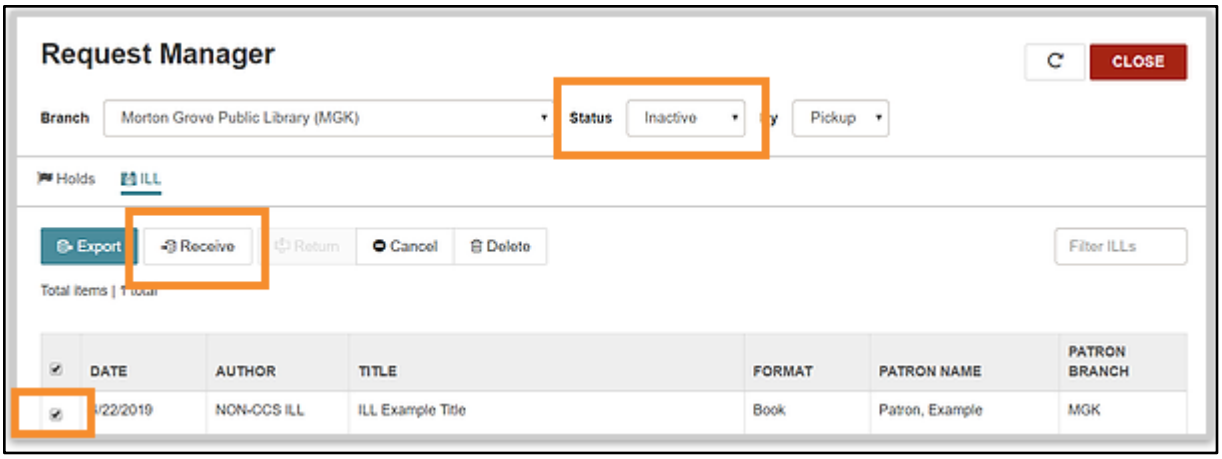
1. Navigate to the ILL/Held tab.
2. Select the checkbox next to the ILL request record.
3. Click **Receive**.
4. Fill out the Brief Item Entry template as per local procedure.



To Receive the request from the Request Manager:

1. Select the **ILL tab** to view the ILL requests. If needed, change the Status to Inactive or Active (depending on local procedure).
2. Select the checkbox next to the ILL request record.
3. Click **Receive**.

4. Fill out the Brief Item Entry template as per local procedure. Again, hold slips and wrappers will not print from the Request Manager.



To Receive the request from the ILL request record:

1. Locate and open the ILL request record.
2. Click Actions.
3. Click Receive.
4. Fill out the Brief Item Entry template as per local procedure.

Once the Brief Item Entry template is filled out, a temporary item record and temporary bibliographic record is also created. The ILL request record now displays links to the item and bib records. A notice in the patron's preferred format is generated.
The ILL request record will display the status of Received until staff mark the request as Returned. During this time, the item will display the following statuses:

- Awaiting Pickup
- Checked Out (once checked out to the patron)
- Available (after the patron returns the item and staff checks it in)

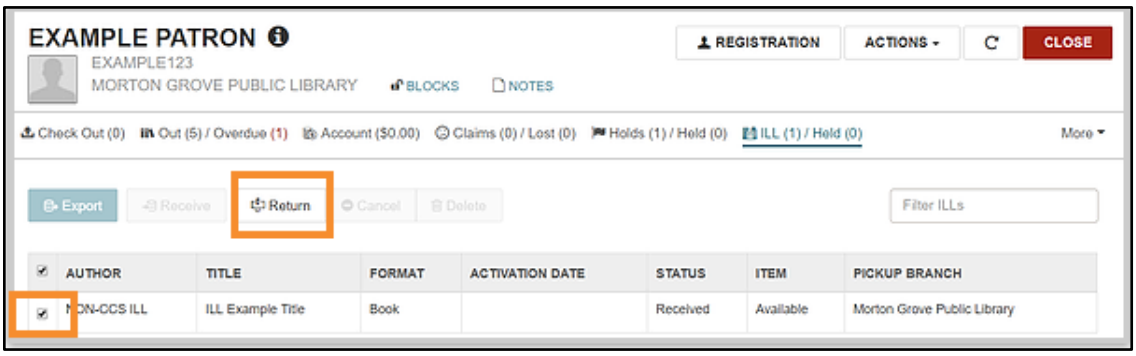
Once the patron returns the item, it will be removed from their PAC account. Only staff will be able to see the request on the patron's record from Leap or the staff client.

RETURNING THE REQUEST

When staff are ready to ship the item back to the supplying library, they should mark the request as Returned in Polaris. This indicates the item has been sent back and is no longer physically in the library's possession.

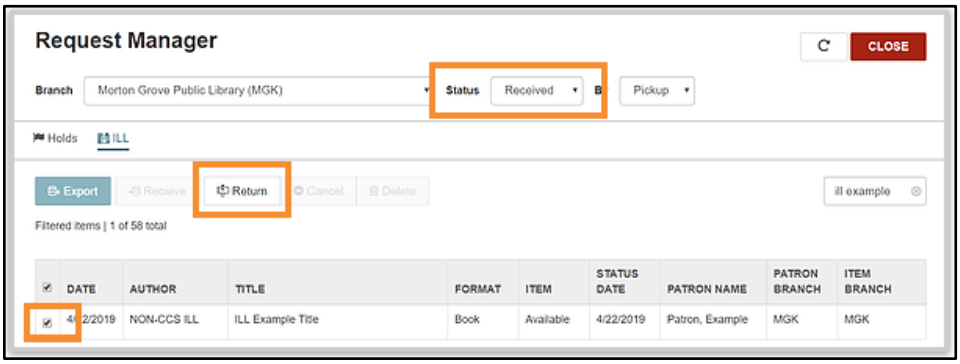
To Return the request from the patron's record:

1. Navigate to the ILL/Held tab.
2. Select the checkbox next to the ILL request record.
3. Click **Return**.



To Return the request from the Request Manager:

1. Select the **ILL tab** to view ILL requests. Change the status to **Received**.
2. Select the checkbox next to the ILL request record.
3. Click **Return**.



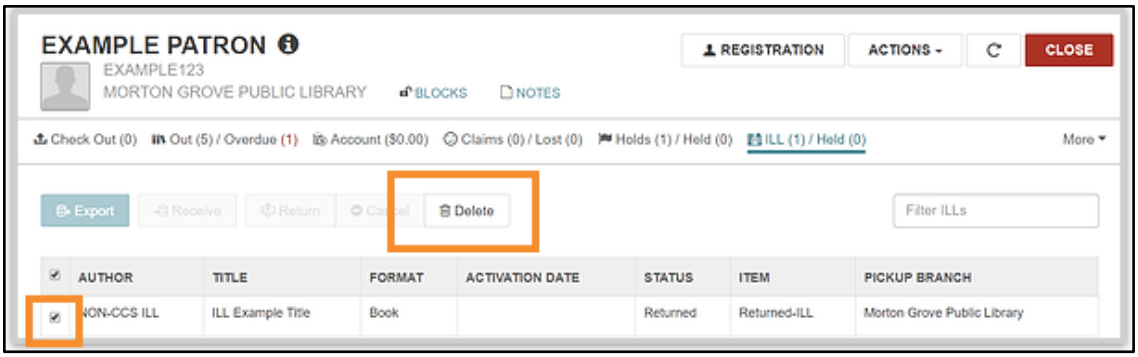
DELETING THE REQUEST

The final step in the ILL process is to delete the ILL request. Deleting the request will delete the ILL request record, the temporary item record, and the temporary bibliographic record.
Libraries should delete the ILL Request Record directly after marking it as Returned.

To Delete the request from the patron's record:

1. Navigate to the ILL/Held tab.

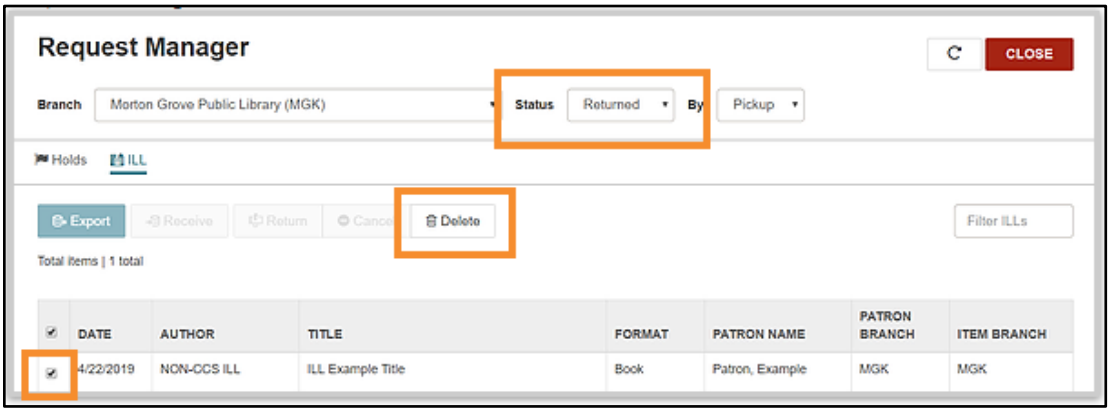
2. Select the checkbox next to the ILL request record.
3. Click **Delete**.



To Delete the request from the Request Manager:

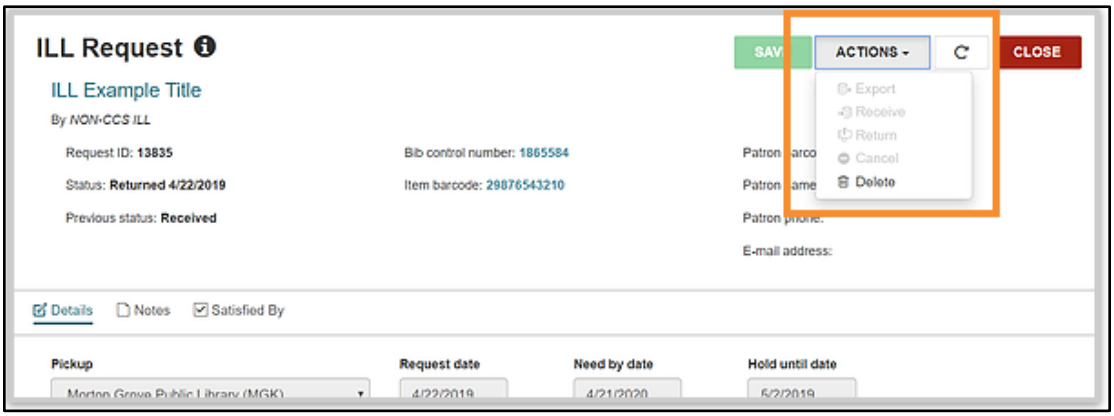
1. Select the **ILL tab** to view ILL requests. Change the status to **Returned**.
2. Select the checkbox next to the ILL request record.
3. Click **Delete**.

Tip: Staff can bulk delete Returned ILL requests by clicking the "Select All" checkbox and clicking Delete.



To Delete the request from the request record:

1. Locate and open the ILL request record.
2. Click **Actions**.
3. Click **Delete**.



LENDING TO A NON-CCS LIBRARY

There is no additional functionality for lending CCS items to a non-CCS library in Leap. When lending an item to a non-CCS library, check the item out in Leap to the appropriate account. Depending on local procedure, this may be an In-House ILL card or a dedicated card for the borrowing institution. Process and manage the item as per local procedures within OCLC.

To change the item's due date before checking the item out, select **Special Loan** and choose the appropriate date. To adjust the due date after checking the item out, select the item and select **Reset Due Date**. Choose the appropriate date.

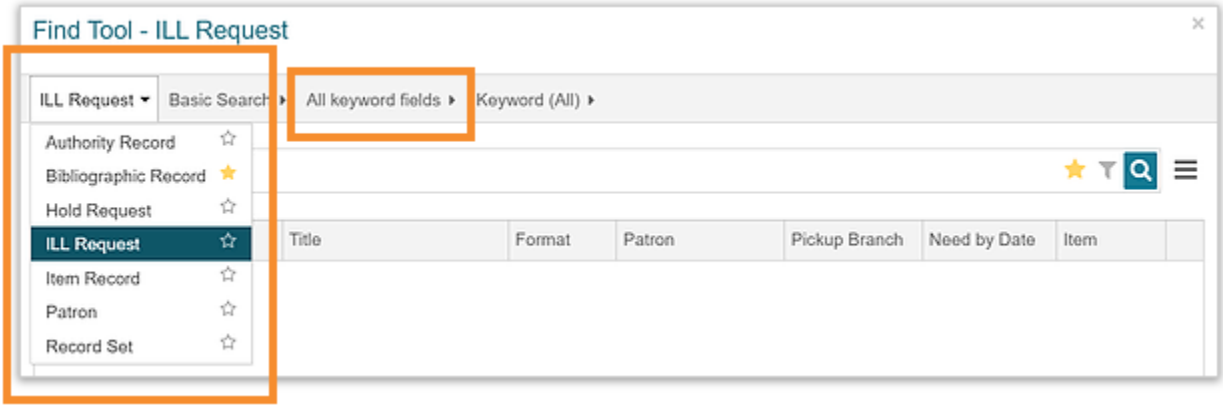
SEARCHING FOR ILL REQUESTS

Staff may locate ILL requests using the Find Tool or by using the Request Manager.

<u>Using the Find Tool</u>

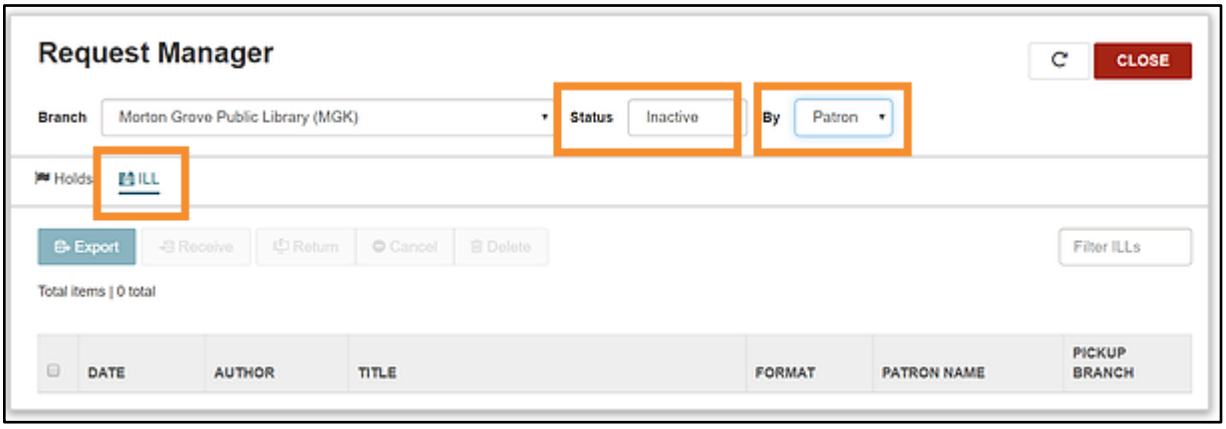
Open the Leap Find Tool. If not already selected, choose **ILL Request** under the search database drop-down menu. The Qualifier drop-down menu tells the Find Tool what data point to search. For example, ILL Requests can be located by title, patron, status, and more. Select the appropriate Qualifier for your search and apply any relevant filters using the funnel icon at the end of the search bar.

Tip: If you primarily use the Find Tool to locate ILL Requests, select the star next to ILL Request in the Search Database drop-down menu. The Find Tool will now open directly to ILL Request.



Using the Request Manager

Access the Request Manager by opening **Utilities** (upper right-corner) and selecting **Request Manager**. Click the **ILL tab** to view out-of-system ILL requests. Select the relevant **Status** from the drop-down menu. Staff also have the option of using the **By** drop-down menu to view ILL requests by just local patrons or all ILL requests set for pickup at your location.



ILL REQUEST RECORD STATUSES

These statuses apply to the ILL Request Record, not to the item.

INACTIVE: The ILL request has been created in Polaris. The request is not yet Exported. The item has not yet been received by the library.

ACTIVE: The request has been Exported. The item has not yet been received by the library.

RECEIVED: This status applies when the item is in possession of the library. The item may be waiting to be picked up, checked out by the patron, or recently checked in.

RETURNED: The item has been sent back to the supplying library.

CANCELLED: The ILL request has been cancelled by a staff member or by the patron.

SHIPPED: The ILL item is being transferred between branches. This status will generally apply to multi-branch libraries who perform centralized ILL.