

## **DRAFT - Directions for receiving/processing Loans from other Lenders**

### Check Items in from Lending Library

- Click “Receives” – pull down in the middle of tool bar at the top of the page
- Click “Check Items In From Lender”
- Fill in the appropriate search information in the according blank fields located in the “Select Record” box - top left hand corner of the screen
- Click “Search” button
  - a list of matches will show in the “records selected” box - top right hand side of the screen
  - Make sure the information in the “records selected” box matches with the information in the “check in” box
- Click “Check Item In” button - bottom right hand side of the screen
  - This will send item into the next bin – Print Items

After you close out of the screen, make sure you click the refresh button located in the top left hand corner of the main menu.

### Post-Receipt Processing (Printing Items)

- \*\* After you refresh the main menu, a queue called “Awaiting Post Receipt Processing” will appear in the list of queues (queues are in alphabetical order)
- Highlight the “Awaiting Post Receipt Processing” queue
  - Click “Receives” – pull down in the middle of tool bar at the top of the page
  - Click “Print Items”
  - Click “Move Loans to Print Queue”
    - \*\* Two windows will pop up, one overlapping the other – you want the top window
  - Click the “Merge” button – right hand side of lower tool bar
  - When window pops up, click “merge”
  - Click print icon and print out band
  - Close out of all Microsoft Word documents (do not save)

make sure you click the refresh button located in the top left hand corner of the main menu.

## Contact Customers

- Highlight “Awaiting Customer Contact” queue
- Click “Receives” – pull down in the middle of tool bar at the top of the page
- Click “Contact Customer”
- Click ONCE (DO NOT DOUBLE CLICK) on the person you wish to contact
- Click “Start Automatic E-Mail” button – top left hand side of screen
  - This sends an e-mail to the patron

\*\* Now you can create a brief record in WorkFlows

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