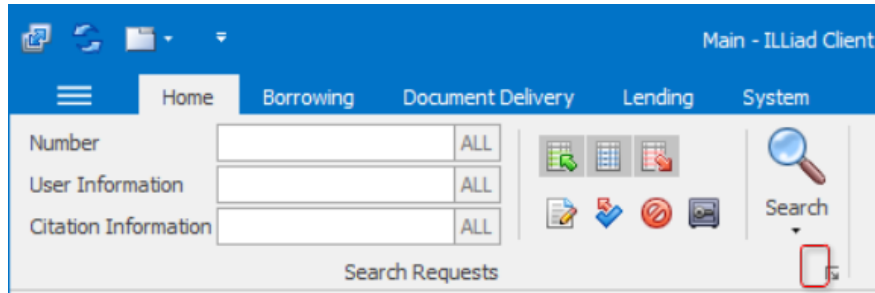


How to Save/Export Patron ILL Request History in ILLiad:

Under the Home tab and within the Search Requests pane, click on the small arrow at the bottom right corner of the Search symbol.



Choose the Request Search option, which will open the following window:

This screenshot shows the 'Request Search - ILLiad Client' window. The 'Searching' tab is selected, and the 'Requests' pane is active. The window is divided into several sections: 'General Information' (Transaction Number, ILL Number, OCLC | Bib Number, Invoice Number, Call Number, Symbol), 'User Information' (Username, Last Name, First Name, Organization), 'Item Information' (Article Title, Article Author, Journal Title, Loan Title, Loan Author, Patron Name), 'Lender Information' (Library Name, Address, Odyssey Address), and 'Limit By Current Statuses' (Borrowing). The 'Borrowing' section includes checkboxes for various statuses: Awaiting Copyright Clearance, Awaiting ILL Supervisor, Cancelled by ILL Staff, Checked Out to Customer, Customer Notified via E-Mail, Delivered to Web, Loans Recalled from Patrons, Pre-March 2020, Request Finished, Request in Processing, Request Sent, and Searching. At the bottom, there is a search bar with a magnifying glass icon and a text prompt: 'Drag a column header here to group by that column'.

Under the User Information section of the window, type the patron's username (or their last or first names) and hit Enter or the Search symbol to display their request history, including Loan and Article requests. If need be, you can customize your search by checking any of the boxes under the Borrowing pane.

Request Search - ILLiad Client

Searching

Home Borrowing Document Delivery Lending System Requests

Borrowing Document Delivery Lending Active Checked Out Cancelled Finished Search Open Cancel Route Send Notification Export Print

Search Requests Process

Main Request Search

General Information

Transaction Number
ILL Number
OCLC | Bib Number
Invoice Number
Call Number
Symbol

User Information

Username: aerdem
Last Name
First Name
Organization

Item Information

Article Title
Article Author
Journal Title
Loan Title
Loan Author
Patron Name

Lender Information

Library Name
Address
Odyssey Address

Limit By Current Statuses

Borrowing

- ☐ Awaiting Copyright Clearance
- ☐ Awaiting ILL Supervisor
- ☐ Cancelled by ILL Staff
- ☐ Checked Out to Customer
- ☐ Customer Notified via E-Mail
- ☐ Delivered to Web
- ☐ Loans Recalled from Patrons
- ☐ Pre-March 2020
- ☐ Request Finished
- ☐ Request in Processing
- ☐ Request Sent
- ☐ Searching

Drag a column header here to group by that column

Transaction...	Username	Request Type	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Journ...	Photo Journ.
655215	aerdem	Article							The Econom...	
661385	aerdem	Loan		Z00 : a zed ...			2008			
662064	aerdem	Loan	North, Rya...	Slaughterho...	Archaia		2020		Slaughterho...	
662573	aerdem	Loan		The Duke o ...						
665879	aerdem	Loan	Fusco, Paul.	RFK /	Aperture		2008		Paul Fusco: ...	
666405	aerdem	Article							Jouissance ...	

Once the request history is compiled, the Export symbol on the main tab will get activated. Click Export to choose the file format (e.g. Excel, PDF, HTML, Text) you want to save this list as.

File name: aerdem ill request history

Save as type: Excel Spreadsheet (*.xlsx)

Hide Folders

Save Cancel

Recommended workflow:

If the patron only needs the citation information of their request history as a PDF, export the history as an Excel Spreadsheet first. This way you can remove all the unwanted information beyond the citations, and sort items as Loans and Articles. Once you clean up the Excel Sheet by deleting the unwanted columns, you can save the document as a PDF.