

Request Manager

To access the **Request Manager**: from the Staff Dashboard, under the ILL Admin module, click on **Request Manager**.

ILL Admin > Request Manager 🏠 🔄 📄

Manage Borrower Requests

Manage Lender Requests

| Status | Action Items | Count | Status | Action Items | Count |
|--|--------------|-------|--|--------------|-------|
| Awaiting Approval | | 58 | Pending | | 0 |
| Not Received | | 13 | Will Supply/In Process | | 0 |
| Not-Received/Overdue | | 0 | Renew/Overdue | | 0 |
| Accepted Renewal | | 0 | Pending Cancel | | 0 |
| Recalled | | 1 | Renew Pending | | 0 |
| Unfilled | | 14 | Returned | | 13 |
| Shipped | | 0 | | | |
| Complete | | 4 | Lost | | 3 |
| Conditional | | 0 | | | |
| Received | | 0 | | | |
| Rejected Renewal | | 0 | | | |
| Overdue | | 27 | | | |
| Expired | | 0 | | | |
| Retry | | 0 | | | |
| Cancelled | | 4 | | | |
| Cancel Shipped Request | | 2 | | | |
| Items awaiting trading partner response | | | Items awaiting trading partner response | | |
| Returned | | 22 | Not Received | | 8 |
| Lost | | 2 | Recalled | | 1 |
| | | | Complete | | 2 |
| | | | Overdue | | 23 |

- To display a list of requests in a category, click on the status label.
- A category will be highlighted in the Request Manager if your library currently has requests in that category.
- Any requests in your Request Manager with the following statuses may be cleaned out by updating to “Delete”. This action will mark the request with a trash can. 🗑️ It will be deleted during overnight processing.
 - **CAUTION.** This action eliminates a request and it cannot be undone.
 - Unfilled (after notifying patron of the reason the request could not be filled)
 - Lost (after resolving issue with the borrower)
 - Cancelled
 - Awaiting Approval (if the request is not going to be approved)
- Do not update requests in the Returned category. The lender will update them to “Check In” when received. Requests will automatically go to “Complete” at that time.
- Statuses under “awaiting trading partner response” generally do not need action from you.
 - On the Borrower side it provides information related to requests that your library has submitted as a borrower. These are awaiting a response from the lenders to whom they were submitted.
 - On the Lender side are requests you have received as a lender that are awaiting response from the borrowers from whom they were received.
 - In some cases, an action may be taken by you as the Borrower such as canceling a request in “Pending” status; or as a Lender you may update a request in “Received” status to “Check In”, if the borrowing library forgot to update to “Returned”.

Borrower Status Category Definitions

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|--------------------------|---|
| Awaiting Approval | Request is awaiting approval before being sent to participant lenders. <i>Automatic Approval may be set by system Administration</i> |
| Not Received | Borrower has not received requested title from lender within the “days to supply” |
| Not Rec’d/Overdue | Lender has sent an Overdue notification to borrower for an item that has not yet been received by borrower. |
| Accepted Renewal | Lender allows borrower to renew loan. |
| Recalled | Lender needs title returned at once, before the due date. |
| Unfilled | Borrower’s request has not/will not be filled by any accessible lender at that time. |

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| Shipped | Lender has shipped requested title to borrower. |
| Complete | Lender has received material returned by borrower (ILL transaction is complete. Requests in Complete status will automatically delete in 90 days.) |
| Conditional | Lender can supply the requested material subject to specified conditions. Borrower must respond ASAP. |
| Received | Borrower has received title from lender. |
| Rejected Renewal | Lender denies renewal of loan. Borrower must honor original due date. |
| Overdue | Borrower has not returned title to lender and due date has expired. |
| Expired | "Need by" date for the request has expired. |
| Retry | Borrower may retry the request if there are lenders that can supply after a specific date. |
| Cancelled | Request has been cancelled by borrower. |
| Cancel Shipped Request | Borrower wants request cancelled, but the lender has already shipped it. This status serves as notification that the patron does not want the item. |
| *Patron Renewal Requests | *Only applicable if library has activated Patron request tracking. Patron has submitted a renewal request for an ILL item currently checked out to them. |
| *Patron Cancellation Requests | *Only applicable if library has activated Patron request tracking. Patron has submitted a cancellation request for an ILL request with a current status of "Awaiting approval", Pending or Will Supply/In Process" |

Lender Status Category Definitions

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|-------------------------------|---|
| Pending | Request has been received by lender, but has not yet been acknowledged. |
| Will Supply/In Process | Request has been accepted by lender, but has not been filled. |
| Renew/Overdue | Borrower requests loan renewal <i>and</i> due date for the item has expired. |
| Pending Cancel | Request is ready to be cancelled by borrower. |
| Renew Pending | Borrower requests loan renewal for title from lender. |
| Returned | Borrower has shipped title back to lender. |
| Lost | Borrower has informed the lender that the loaned item is lost. Lender declares the item Lost, by updating request status to "lost". |

***Undo Shipped:** This status does not display as a category in the Request Manager. Rather, it is a status option that appears for lenders in the dropdown action menu for requests in "Shipped" status. It is only available for non-OCLC borrowers. Staff must have permission to use this status, set through ILL permissions in the User Admin screen.