

ILLiad-Caiasoft Processing (in Caiasoft)

Accessing Caiasoft

<https://albany.caiasoft.com/>

- Sign in to Caiasoft (using UAlbany netID and Password)
- Click on the Circulation Tab (left side of screen)

Once the requests are in Caiasoft:

1. They are placed in an **External Retrieval Requests Job** in the Circulation Jobs in Queue box

Circulation

Retrieve Items from and Refile Items to Addresses

Circulation Jobs in Queue - 7 Jobs Open : 2 Incoming, 2 Outgoing, 0 Reading Room, 3 Retrieval Request Files

| Job # | Type | Job Date | Stop(s) | Status | Item Count | Validated Count |
|-------|-----------------------------|----------|---------------------|----------|------------|-----------------|
| 436 | Refile | 02/26/20 | | In Queue | 15 | 8 |
| 493 | Refile | 03/09/20 | | In Queue | 1 | 0 |
| 532 | Physical Retrieval | 08/04/20 | | In Queue | 0 | 0 |
| 537 | External Retrieval Requests | 08/27/20 | | Waiting | 39764 | 0 |
| 540 | External Retrieval Requests | 09/18/20 | SL-Circulation Desk | Waiting | 1 | 1 |
| 541 | E-Retrieval | 09/18/20 | SL-Circulation Desk | In Queue | 1 | 0 |
| 542 | External Retrieval Requests | 09/22/20 | SL-Circulation Desk | Waiting | 2 | 0 |

2. Click the appropriate **Job #** and then click the **Apply to Job** button

| Job # | Job Status | Items | Denied | Find Item Needed | On Hold | Applied to Job | Job Date |
|-------|------------|-------|--------|------------------|---------|----------------|----------|
| 542 | In Queue | 2 | 0 | 0 | 0 | 0 | 09/22/20 |

⏏ Stop Stream / Send New Requests to New ERQ

→ Apply to Job

🔄 Update Stops

🗑 Delete Item

Request Stream Items

| Barcode | Request Type | Stop | Requestor | Details | Title | API Feed | Denied | Denial Details | Scheduled on Job |
|----------------|--------------|---------------------|--------------|------------------------------|---|--------------------------------|--------|----------------|------------------|
| 39089017874726 | ERT | SL-Circulation Desk | User Lending | View Details | Serials review | ILLIAD 09/22/20 14:05:39 | N | | |
| 39089017906114 | ERT | SL-Circulation Desk | User Lending | View Details | Journal of Youth Services in Libraries Kuhlthau, Carol Collier.; Meeting the information needs of children and young adults: basing library media programs on developmental states. | ILLIAD 09/22/20 14:07:00 | N | | |

3. Click **Apply Requests**

| Job # | Job Status | Items | Denied | Find Item Needed | On Hold | Applied to Job | Job Date |
|-------|------------|-------|--------|------------------|---------|----------------|----------|
| 542 | In Queue | 2 | 0 | 0 | 0 | 0 | 09/22/20 |

[Cancel](#)

Physical Retrieval Items

0 Item(s) to Apply

E-Retrieval Items

2 Item(s) to Apply

| Stop | Location | Count | Apply |
|------|------------------|-------|---------------------------------------|
| SL | Circulation Desk | 2 | New Job (Mixed Stops) |

[→ Apply Requests](#)

4. Click **Close Stream**

Once items have been applied to a retrieval job:

- The new job will now be listed under
 - E-Retrieval** for article scans
 - Physical Retrieval** for loans

- Click the appropriate **Job #**
- Click **Pick List by Job**

| Job# | Status | Stops | Items | Val |
|------|----------|-------|-------|-----|
| 532 | In Queue | 2 | 0 | 0 |

[Interactive Pick List](#)

[Pick List by Job](#)

[List by Stop](#) [List by Aisle](#)

- Check the box for the appropriate job
- Click **Generate**
- Print the pick list and take the list and ILLiad pull slips to Storage
- Pull items and take them back to the Science office

Once items have been pulled from Storage:

- Click the appropriate **Job #**
- Click **Validate Items**
- Scan item barcode(s) into the box(es)
- Click **Complete Job**
- Click the checkbox next to **Contents of this E-Retrieval will automatically be added to the Refile Job Queue "on a New Job"**
- Click **Continue**

The request is now ready to be scanned or checked out in ILLiad

After scanning, return the Item in Alma to put it in Transit to Storage