Welcome!

Made possible by our Strategic Partners

Wi-fi Info

Select AT&T or HHonors Wi-Fi Signal
Open Browser
Select option for Coupon/Promo Code
Enter Promo Code: IDS-BEST-HGI (all caps)

Agenda

10:00am Coffee & Registration
10:30am Welcome, Updates, and Announcements
11:00am ILLiad 8.6 Preparation Guide for Email Templates
12:00pm Lunch
1:00pm Creative Ways to Use Your Email Template Using Routing Rules
2:00pm Coffee Break
2:15pm Guide for ILLiad Print Templates
3:30pm Wrap Up
6:00pm Dinner

Update

Thank you to our conference sponsors

Partnerships

New Regional User Group Chairs

Western:

- Chair: ???
- Co-Chair: Lucy Yang

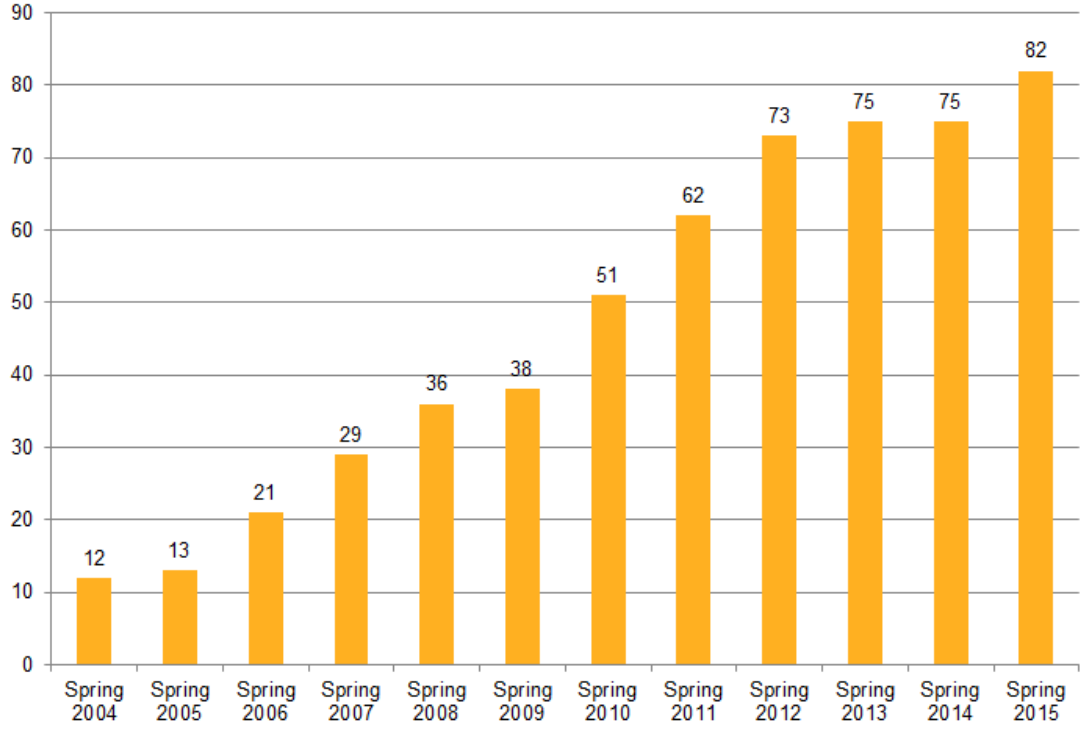
Eastern:

- Chair: Melissa Perez
- Co-Chair: Katherine Brent

METRO:

- Chair: Rebecca Hyams
- Co-Chair: Philip Mui

Current Membership

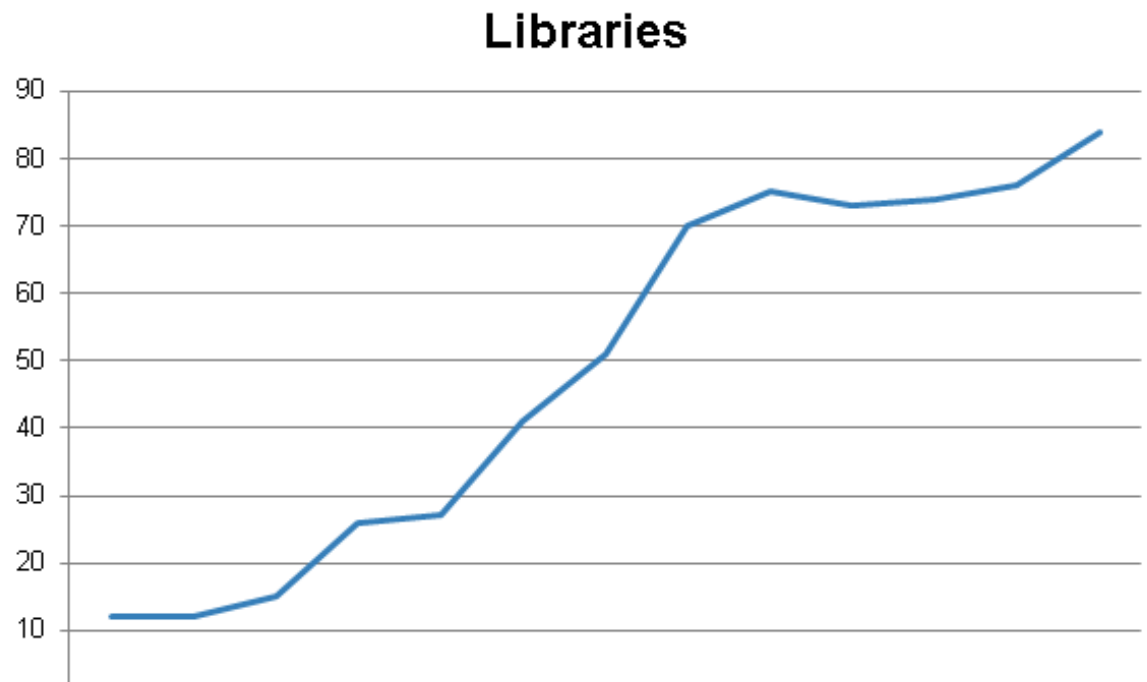


IDS PROJECT

UNIVERSITY LIBRARIES
UNIVERSITY AT ALBANY State University of New York

ST. JOHN'S UNIVERSITY

UNIVERSITY of ROCHESTER



Expansion Libraries

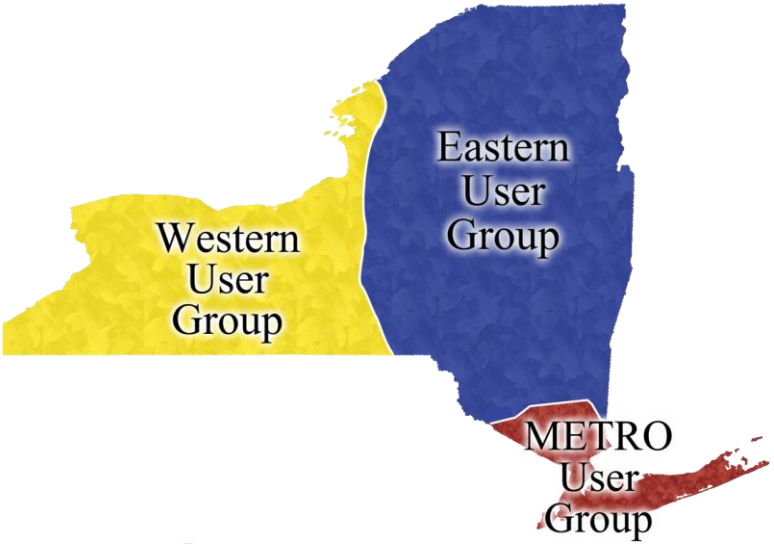
1. American University
2. Bowdoin College
3. Claremont Colleges
4. Humbolt College
5. Middlebury College
6. University of Richmond
7. University of Texas at Austin
8. University of Texas at San Antonio
9. Wellesley College

Online Learning Institute

Courses:

Borrowing 101 | Lending 101 | Copyright 101

Seats limited to 30 students. Fall Registration Dates forthcoming



IDS PROJECT

Online Workshops

IDS PROJECT

Online Mentor Institute

Opening again this Fall!

Mentor Program: Benefits if you have a Mentor

- Access to Atlas Training Suite ($999.00 annual subscription)
- Conference fee to *International ILLiad Conference* covered ($200)
- Conference & hotel to *Annual IDS Conference* covered ($175+ hotel)
- Professional development opportunities available
- Collaborate with other mentors
- Travel & accommodations for site visits covered
- Opportunities to learn from others & bring new ideas back to your library

Mentor Program:
Benefits to your staff & library

- General on-call assistance
- Available via email
- Go-to-Assist online support
- Polishing-up after Atlas training
- Workflow evaluation & optimization
- Workflow Toolkit updates & additions
- Access to Mentors at Regional User Groups
- Site visits

What's New with Logic?

Current IDS Logic Beta Testers

1. Yale University
2. University of Oregon
3. Northwestern University

Syracuse and Upstate Medical

IDS Logic Modules

Borrowing Availability Service

Book Chapter Direct Requester

Lending Book Chapter Availability Lookup

Custom Transaction Router Emailer

Lending Availability Service

Direct Request Enhancer

ALIAS 2.0

Borrowing Availability Service

- Looks at Borrowing Requests with an ISBN or OCLC# in Awaiting Request Processing
- Checks your library's catalog to determine if you own the material. If you own the material:
  - Determines if the item is checked out.
  - Applies multiple rules to check if item is in specific collections, such as coure reserves, that would prompt a borrowing staff to cancel or review the request.
  - Multiple availability settings are possible, just as with Lending Availability Service, and the configuration will be facilitated with the IDS staff who sets up your site.
  - If item is deemed "not available" at your library, request is sent to "Awaiting Direct Request Sending" to be sent out as an OCLC request via direct request.
  - If item is "available" at your library, call # and location are filled in, and the transaction is routed to the designated queue in borrowing or document delivery. Default is "Awaiting DD Stacks Searching" in Document Delivery.

Book Chapter Direct Requester

- Determines if the request is a book chapter request (differentiates between issn and isbn)
- Searches your z39.50 for availability information, and then either
- Cancels in OCLC and Illiad, using appropriate cancellation reason in both systems, if book chapter is requested from something that is checked out or in a collection from which you do not scan.
- If available to scan, Imports call number and location information into transaction in ILLiad.
- Routes to specified queue, which could be Awaiting Stacks Searching or another custom queue.

Lending Book Chapter Availability Lookup

- Determines if the request is a book chapter request (differentiates between issn and isbn)
- Searches your z39.50 for availability information, and then either:
  - Routes to Doc Del (importing call number and location) if you own the item and it is available.
  - If not owned or unavailable, sends request out via OCLC/Worldshare ILL with appropriate lender string.

Custom Transaction Router Emailer

- Runs the query specified on the queue, status, and transaction type.
- Unlike client addons, does not need an action to run. For example, this can route transactions from queues or send emails even if they have not changed status for days or weeks.
- No limit on length of query on routing rule.
- Can only send emails to default addresses (patron email for borrowing, and borrowing dept email from requesting library for lending)
- Can be run on multiple queues simultaneously.

Lending Availability Service

- Extracts ISBN and OCLC# from request and queries the library's z39.50 server to return availability information.
- After information is returned from Z39.50 server, availability rules are applied to determine whether this loan is available for lending via ILL.
- After availability rules are applied, and availability from your catalog/z39.50 is returned:
    a. Unavailable requests are canceled in OCLC and Illiad, using appropriate cancellation reason in both systems.
    b. If available to lend, Imports call number and location information into transaction in ILLiad. Due date, renewal information, and other relevant information is also inserted..

Direct Request Enhancer

Looks at Transactions that fail Direct Request due to not enough lenders and:

- Takes the OCLC # or ISBN and transforms into mostly held OCLC number of a different edition
- Routes the Transaction to “Awaiting Direct Request Sending”
- Transaction is sent out to potential lenders via the LendingString created based on Custom Holdings and Direct Request profile
- If it fails, it will try the next most commonly held OCLC # matching the item requested

33 IDS libraries have upgraded to ALIAS 2.0.

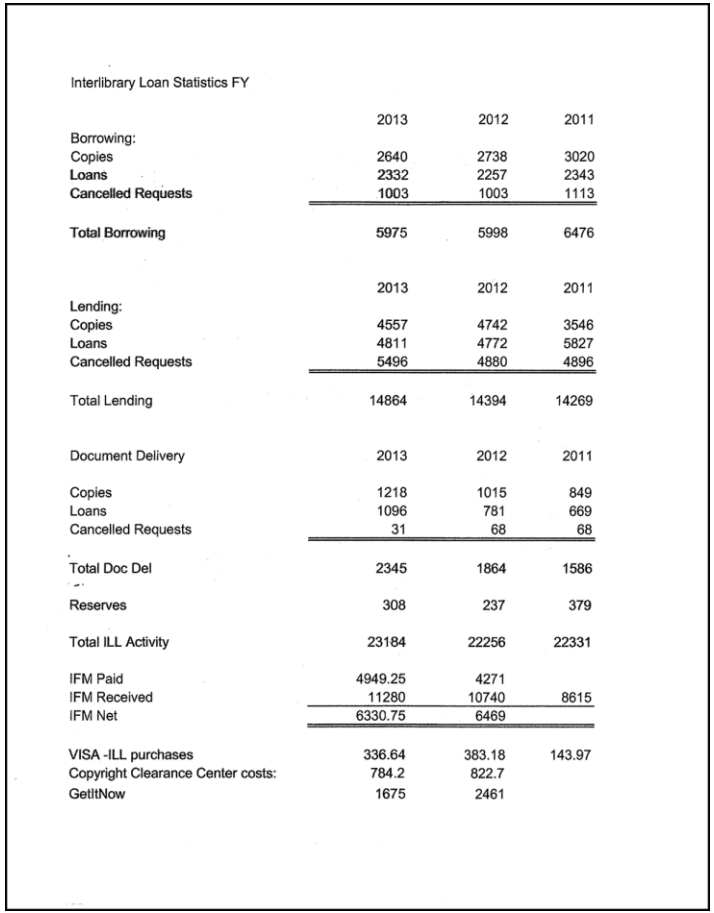
Have you?

Please contact Bill Jones at jonesw@geneseo.edu to schedule a meeting and have this completed by the end of August.

IDS Data Services

Looking to automate end of year reports.

We're also looking for ideas from you to see what types of reports you would like automatically generated.



Interlibrary Loan Statistics FY

	2013	2012	2011
Borrowing:			
Copies	2640	2738	3020
Loans	2332	2257	2343
Cancelled Requests	1003	1003	1113
Total Borrowing	5975	5998	6476

	2013	2012	2011
Lending:			
Copies	4557	4742	3546
Loans	4811	4772	5827
Cancelled Requests	5496	4880	4896
Total Lending	14864	14394	14269

Document Delivery	2013	2012	2011
Copies	1218	1015	849
Loans	1096	781	669
Cancelled Requests	31	68	68
Total Doc Del	2345	1864	1586
Reserves	308	237	379
Total ILL Activity	23184	22256	22331
IFM Paid	4949.25	4271	
IFM Received	11280	10740	8615
IFM Net	6330.75	6469	
VISA -ILL purchases	336.64	383.18	143.97
Copyright Clearance Center costs:	784.2	822.7	
GetItNow	1675	2461	

ILLiad 8.6 Preparation Guide for Email Templates

Benefits of sending e-mails through ILLiad

- E-mails are already typed and ILLiad will merge information such as patron name and request info
- You know who sent the e-mail
- You know what day and time the e-mail was sent
- E-mails are in the transaction history for all staff to see and read
- E-mails paired with Routing Rules save time(Example: Borrowing-Renewal E-mail routes the book request back to Checked Out to Customer

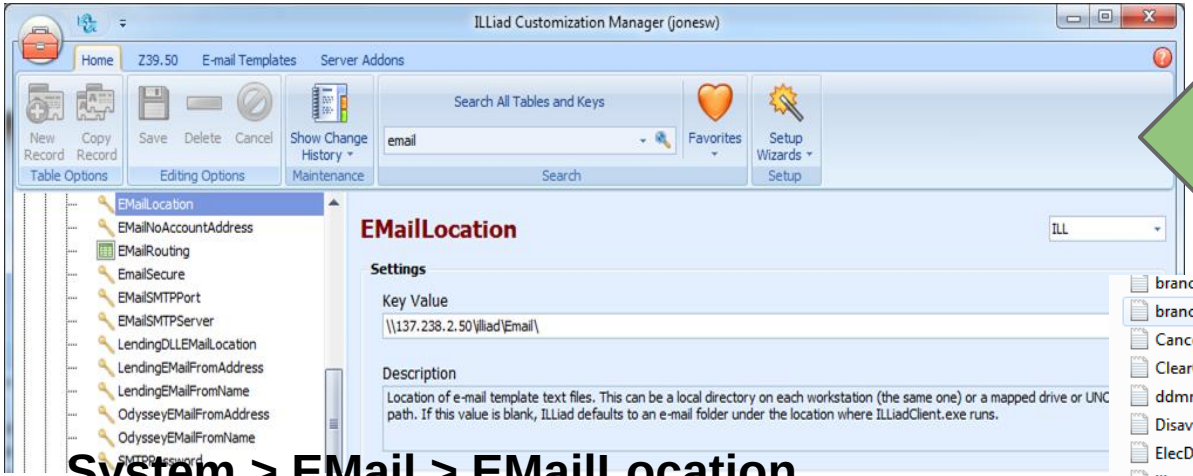
What is changing in 8.6

- The Email Template tab in the Customization Manager has been renamed to Notification Templates.
- Email subjects will now be set in the email template, and EmailSubject customization keys have been deleted.
- Field tags in email templates now use the table.fieldformat. Templates that already exist will be updated (for example, changed from <#LoanTitle> to <#Transaction.LoanTitle>).

https://prometheus.atlas-sys.com/display/illiad/ILLiad+8.6+Release+Notes

AFTER UPGRADING: ***If you delete the .txt from the name remember to change the name in your e-mail routing rules!!! When creating new e-mails in the Customization Manager you no longer need .txt in the file name.***

Where are your Print and E-mail Templates?



Customization Manager

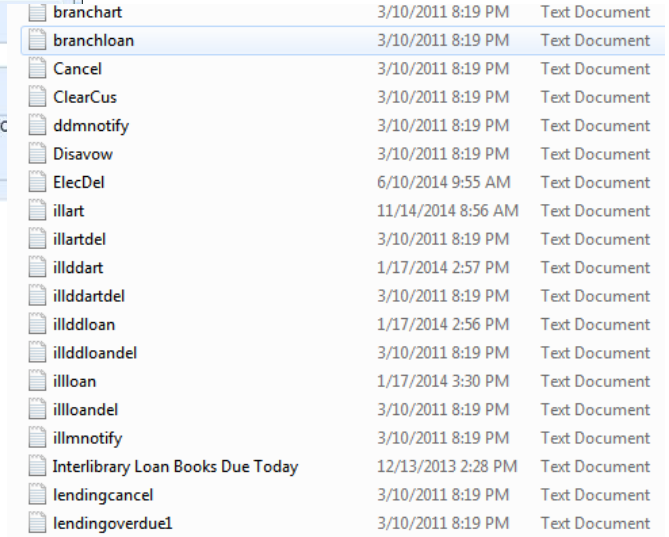
System > EMail > EMailLocation

C:\Program Files

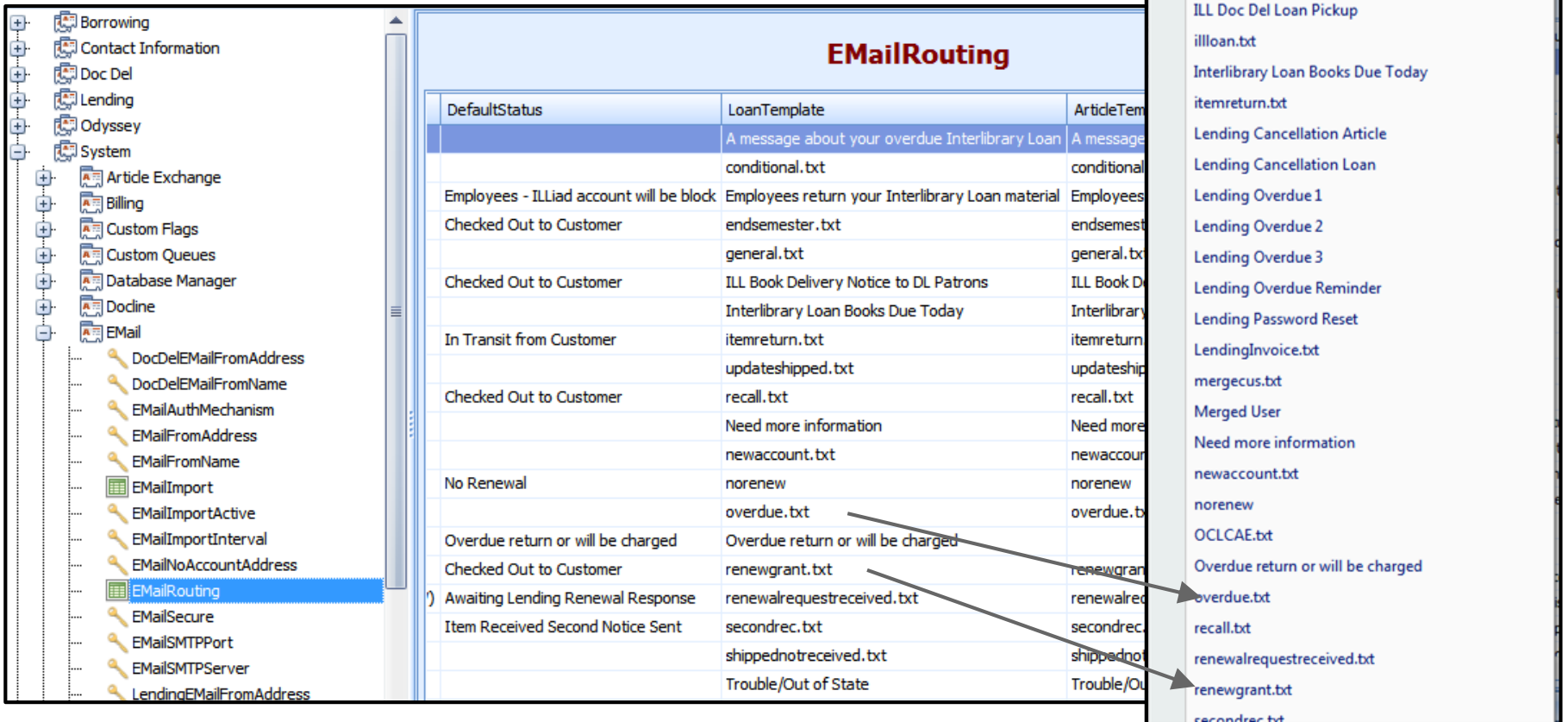
C:\Program Files (x86)

Network Drive

.txt files



Do I need to move anything?



ILLiad 8.5 Default E-mails

Overdue Emails

- BorrowingOverdue1
- BorrowingOverdue2
- BorrowingOverdue3
- BorrowingOverdueReminder
- LendingOverdue1
- LendingOverdue2
- LendingOverdue3
- LendingOverdueReminder

https://prometheus.atlas-sys.com/display/illiad/Moving+Email+Templates+BEFORE+Updating+to+ILLiad+8.6

Article Exchange

- ArticleExchangeLendingNotification

Notification Emails

- ILLArticleNotify
- ILLArticleDeliveryNotify
- ILLLoanNotify
- ILLLoanDeliveryNotify
- ILLDDArticleNotify
- ILLDDArticleDeliveryNotify
- ILLDDLoanNotify
- ILLDDLoanDeliveryNotify

8 Default templates that will be moved during the upgrade

Borrowing

- **Auto Cleared User -** The email used when a user registers and is automatically cleared.
- **Borrowing Password Reset -** The email used when a borrowing user requests a password reset.
- **Borrowing Cancel** - The email used to notify patron their request has been cancelled materia
- **Cleared User -** The email used when sending out the notification email when a user is cleared.
- **Disavowed User -** The email used when sending out the notification email when disavowing a user.
- **Merged User -** The email used when sending out the notification email when two user records are merged.

WE'RE MOVING!

Lending

- **Lending Cancel** - The email used to notify lenders their request has been cancelled
- **Lending Password Reset -** The email used when a lending user requests a password reset.

ILLiad 8.6 Default Borrowing Emails

Auto Cleared User - The email used when a user registers and is automatically cleared.
Borrowing Cancellation Article - The email used when sending out the borrowing article cancellation email.
Borrowing Cancellation Loan - The email used when sending out the borrowing loan cancellation email.
Borrowing Electronic Delivery - The email used when sending out the borrowing electronic delivery notification email.
Borrowing Overdue 1 - The email text used when sending out borrowing overdues for the first overdue period.
Borrowing Overdue 2 - The email text used when sending out borrowing overdues for the second overdue period.
Borrowing Overdue 3 - The email text used when sending out borrowing overdues for the third overdue period.
Borrowing Overdue Reminder - The email text used when sending out borrowing overdue reminders.
Borrowing Password Reset - The email used when a borrowing user requests a password reset.
Cleared User - The email used when sending out the notification email when a user is cleared.
Disavowed User - The email used when sending out the notification email when disavowing a user.
ILL Borrowing Article Delivery - The notification email text used for articles delivered to customers.
ILL Borrowing Article Pickup - The notification email text used for articles available for customer pickup.
ILL Borrowing Loan Delivery - The notification email text used for loans delivered to customers.
ILL Borrowing Loan Pickup - The notification email text used for loans available for customer pickup.
Merged User - The email used when sending out the notification email when two user records are merged.

ILLiad 8.6 Default Lending E-mails

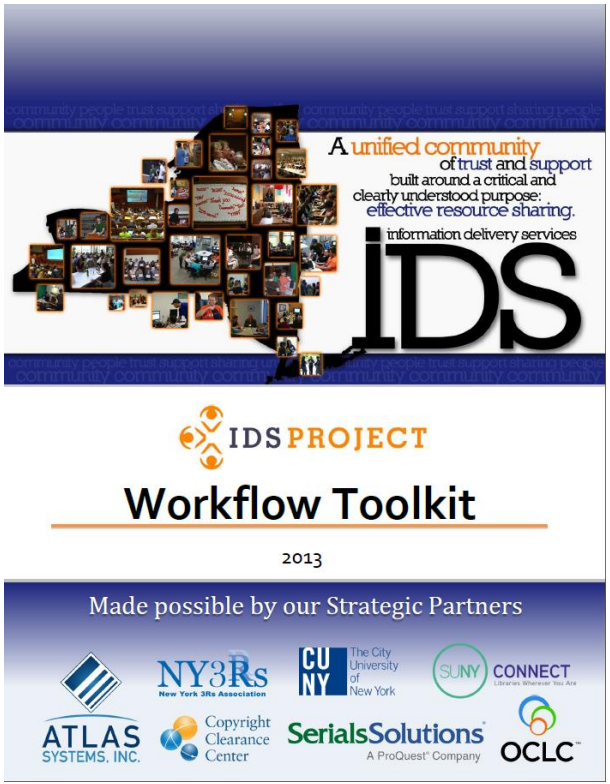
Article Exchange Lending Notification - The email text used to notify a borrowing library that an Article Exchange document has been uploaded.
Lending Cancellation Article - The email used when sending out the lending article cancellation email.
Lending Cancellation Loan - The email used when sending out the lending loan cancellation email.
Lending Overdue 1 - The email text used when sending out lending overdues for the first overdue period.
Lending Overdue 2 - The email text used when sending out lending overdues for the second overdue period.
Lending Overdue 3 - The email text used when sending out lending overdues for the third overdue period.
Lending Overdue Reminder - The email text used when sending out lending overdue reminders.
Lending Password Reset - The email used when a lending user requests a password reset.

ILLiad 8.6 Default Doc Del E-mails

Doc Del Cancellation Article - The email used when sending out the document delivery article cancellation email.
Doc Del Cancellation Loan - The email used when sending out the document delivery loan cancellation email.
Doc Del Electronic Delivery - The email used when sending out the document delivery electronic delivery notification email.
ILL Doc Del Article Delivery - The notification email text used for Doc Del articles delivered to customers.
ILL Doc Del Article Pickup - The notification email text used for Doc Del articles available for customer pickup.
ILL Doc Del Loan Delivery - The notification email text used for Doc Del loans delivered to customers.
ILL Doc Del Loan Pickup - The notification email text used for Doc Del loans available for customer pickup.

Can be found in the Atlas Documentation at: https://prometheus.atlas-sys.com/display/illiad/Default+ILLiad+Email+Templates?src=search

Workflow Toolkit Examples



E-mail Templates submitted to IDS Project in the Workflowtoolkit:
http://toolkit.idsproject.org/emailtemplates.aspx

Borrowing

Dear <#FirstName> <#LastName>

Loan Title: <#LoanTitle>
Loan Author: <#LoanAuthor>
TN: <#TransactionNumber>

The material listed above is a Thesis (Book), not a journal article, the way the citation in the database often times makes it appear. We have been asked by the administration to confirm this material is still needed as it is generally owned by one institution, and if this institution refuses to lend we will purchase this for you, at the charge of $30.00 that the Library will pay.

Please confirm by replying to this message that you would like us to order this Thesis (Book).
Thanks!

-The ILL Office

Phone: 585-389-2184 or 389-2185
Interlibrary Loan office hours are Monday through Friday from 8:00am to 4:30pm
Lorette Wilmot Library hours may be found at:
http://www.naz.edu/dept/library/
http://toolkit.idsproject.org/emailtemplates/from_user_groups/Borrowing_Dissertation_Cancellation.txt

Hello <#LendingLibrary>,

Thank you for filling this recent article request for us. Unfortunately, we had a problem with the document you sent. Could you resend it, possibly via email?

Item Title: <#LoanTitle><#PhotoJournalTitle>
Pub. Date: <#LoanDate><#PhotoJournalYear>
Journal Volume: <#PhotoJournalVolume> Issue: <#PhotoJournalIssue>
Pages: <#PhotoJournalInclusivePages>
Article/Chapter Title:<#PhotoArticleTitle>
Author: <#LoanAuthor><#PhotoArticleAuthor>
OCLC ILL#<#ILLNumber>
<#OCLCSymbol> Transaction Number: <#TransactionNumber>

Thanks for your help.

Sincerely,

Dan Mulvey
Interlibrary Loan Services Manager
Warren Hunting Smith Library
Hobart and William Smith Colleges
Geneva, NY 14456
OCLC: ZEM
http://toolkit.idsproject.org/emailtemplates/from_user_groups/Borrowing_Please_Resend_Request.txt

Lending

Dear ILL Staff,

Interlibrary loan item #<#ILLNumber>:

Title: <#PhotoJournalTitle><#LoanTitle>
Author: <#PhotoArticleAuthor><#LoanAuthor>
Due Date: <#DueDate>

is extremely overdue. Click here to download the PDF invoice:

http://illiad.potsdam.edu/illiad/PDF/invoice/<#ILLNumber>.pdf

Failure to pay this charge may result in the suspension of your institution's borrowing rights. If you believe this invoice was sent in error, please let us know in an email reply or by phone at the number below.

Thank you.

_____
<#BorrowingContactName>, Interlibrary Loan
<#LibraryName>
<#GeneralEMailAddress>
<#BorrowingPhone>
<#BorrowingHours>
http://toolkit.idsproject.org/emailtemplates/from_user_groups/Lending_Invoice_Lost_Material.txt

Dear <#LendingLibrary> ILL,

This message is in regards to the following ILL request:

Item Title: <#LoanTitle><#PhotoJournalTitle>
Pub. Date: <#LoanDate><#PhotoJournalYear>
Journal Volume: <#PhotoJournalVolume> Issue: <#PhotoJournalIssue> Pages: <#PhotoJournalInclusivePages>
Article/Chapter Title:<#PhotoArticleTitle>
Author: <#LoanAuthor><#PhotoArticleAuthor>
ILL Number: <#ILLNumber>
<#OCLCSymbol> Transaction Number: <#TransactionNumber>

This item was updated to shipped by mistake. Please cancel the request as we are unable to supply the requested item.

Thank you,
Hudson Valley Community College <#OCLCSymbol>
<#GeneralEmailAddress>
<#GeneralPhone>

http://toolkit.idsproject.org/emailtemplates/from_user_groups/Lending_Unable_to_Ship.txt

Miscellaneous

Hi, Sally
Ejournals indicates that the following article is available, but we cannot locate it.

Call Number: <#CallNumber>
Location: <#Location>

Journal Title: <#PhotoJournalTitle>
Article Author: <#PhotoArticleAuthor>
Article Title: <#PhotoArticleTitle>

Journal Vol: <#PhotoJournalVolume> Journal Issue: <#PhotoJournalIssue>
Journal Month: <#PhotoJournalMonth> Journal Year: <#PhotoJournalYear>
Article Pages: <#PhotoJournalInclusivePages>

ILLiad Transaction Number: <#TransactionNumber>

If you have any questions, contact us at:

E-Mail: <#LendingEMailAddress>
Phone: <#LendingPhone>
http://toolkit.idsproject.org/emailtemplates/from_user_groups/Serials_Holding_Discrepancy.txt

Marianne,

We received the following request:

Serial title: <#PhotoJournalTitle>
Volume / issue: <#PhotoJournalVolume><#PhotoJournalIssue>
Date: <#PhotoJournalYear> <#PhotoJournalMonth>
Pages: <#PhotoJournalInclusivePages>
Article Author <#PhotoArticleAuthor>
Article Title <#PhotoArticleTitle>
ISSN <#ISSN>

In Serials Solutions, our records show us having access to this Volume/year, but when attempting to process the request it appears we do not.

We are continuing to process this request as normal, so this email is strictly for informational purposes.

Thank you!!!

Access Services Staff

http://toolkit.idsproject.org/emailtemplates/from_user_groups/Serials_Holding_Error.txt

Video: How to move e-mails before upgrade

https://goo.gl/V384n9

Template Details

Name: Trouble/Out of State

NVTGC: ILL

Description: E-mail patrons to let them know we are having trouble getting their item/have gone out of state

E-mail | SMS

From Name: <#LocalInfo.GeneralContactName>

From Address: ill@hvcc.edu

To Name:

To Address: <#User.EMail

CC Address:

BCC Address:

Subject: Update on your Interlibrary Loan Request <#Transaction.BorrowerTN>

Dear <#User.FirstName>,

We received your request for:

Title: <#Transaction.LoanTitle>
Author: <#Transaction.LoanAuthor>
TN: <#Transaction.TNumber>

This e-mail is to let you know we are working on obtaining a copy of the item you requested, but we are having a hard time. We are now asking libraries outside of NY State. This e-mail is to let you know that if we are able to obtain a copy it could take up to 2 weeks or more to arrive.

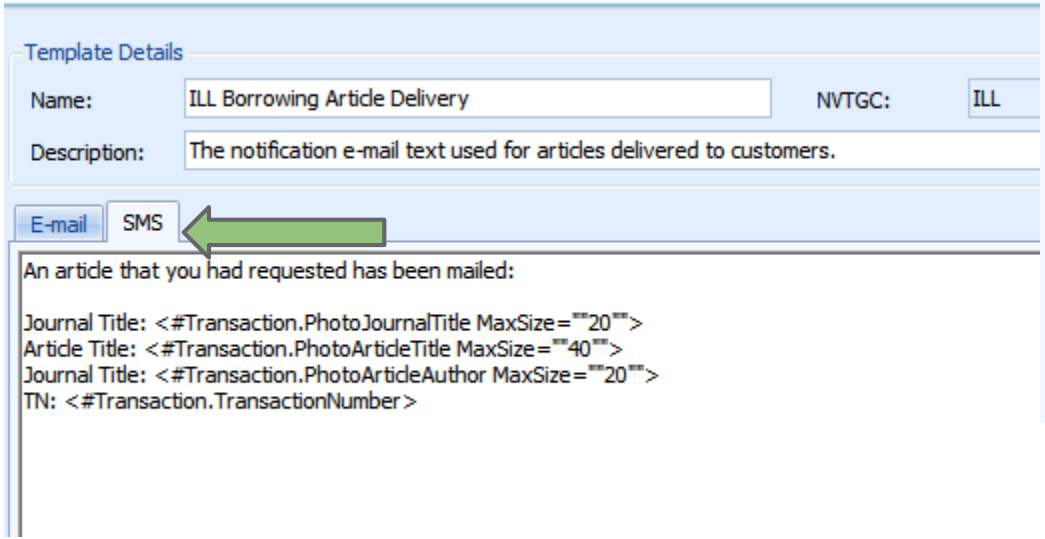
If you no longer want the item or no longer need the item please reply to this e-mail and let us know. If you still need this item please be patient!

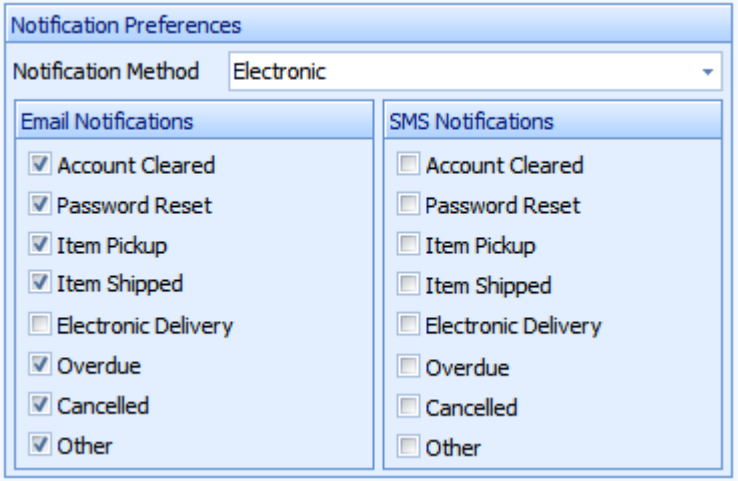
Thank you,
Jennifer Acker
518-629-7387
ill@hvcc.edu

Note: This section was blank including the Subject line on all the e-mails I created before upgrading!

SMS Message Example

https://prometheus.atlas-sys.com/display/illiad/Text+Message+Templates





ILLiad 8.6 Default SMS/Text messages

- Auto Cleared User
- Borrowing Cancellation Article
- Borrowing Cancellation Loan
- Borrowing Electronic Delivery
- Borrowing Overdue 1
- Borrowing Overdue 2
- Borrowing Overdue 3
- Borrowing Overdue Reminder
- Borrowing Password Reset
- Cleared User
- Disavowed User
- Doc Del Cancellation Article
- Doc Del Cancellation Loan
- Doc Del Electronic Delivery
- ILL Borrowing Article Delivery
- ILL Borrowing Article Pickup
- ILL Borrowing Loan Delivery
- ILL Borrowing Loan Pickup
- ILL Doc Del Article Delivery
- ILL Doc Del Article Pickup
- ILL Doc Del Loan Delivery
- ILL Doc Del Loan Pickup
- Merged User

Note: SMS/Text messages will not work for lending

https://prometheus.atlas-sys.com/display/illiad/Text+Message+Templates

Sandbox: Email Template Creation

Email Templates discussion

- How many people have access to the Customization manager and have seen the email templates?
- What useful email templates do you have?
- What email templates do you use the most?
- What do you find yourself constantly editing off of a general email template?
- What email do you manually send over and over?

Lunch Break

Thank you to Atlas Systems!

Email Routing Rules

- [Partially automate] organization and tracking using emails/queues
- Process is same for both 8.5 and 8.6

Do I Need a Rule?

- Do you find yourself sending the same email over and over?
- Do you want to keep track of those requests?
- Do you want to group requests in a queue related to an email?

Do I Need a Rule…(cont'd)?

- Then yes, email routing is for you

- To make a rule work you need three things:
  - Email template to use
    - (Covered before lunch)
  - Queue to move requests to/from
  - Email routing rule

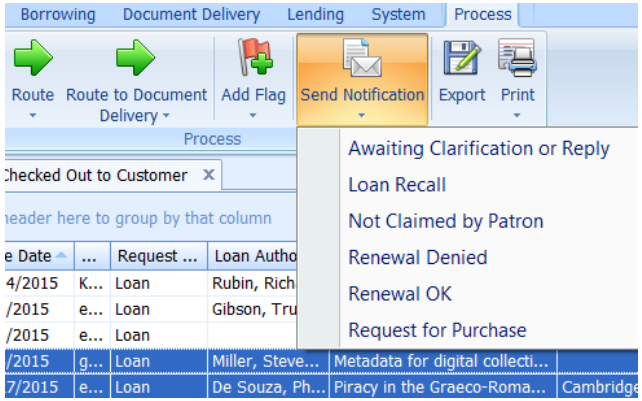
How does Email Routing Work?

Instead of sending an email and *__then__* manually routing the request, the queue changes as the email is sent.

With Email Routing, one step takes care of two tasks!

How does Email Routing Work? (pt. 2)

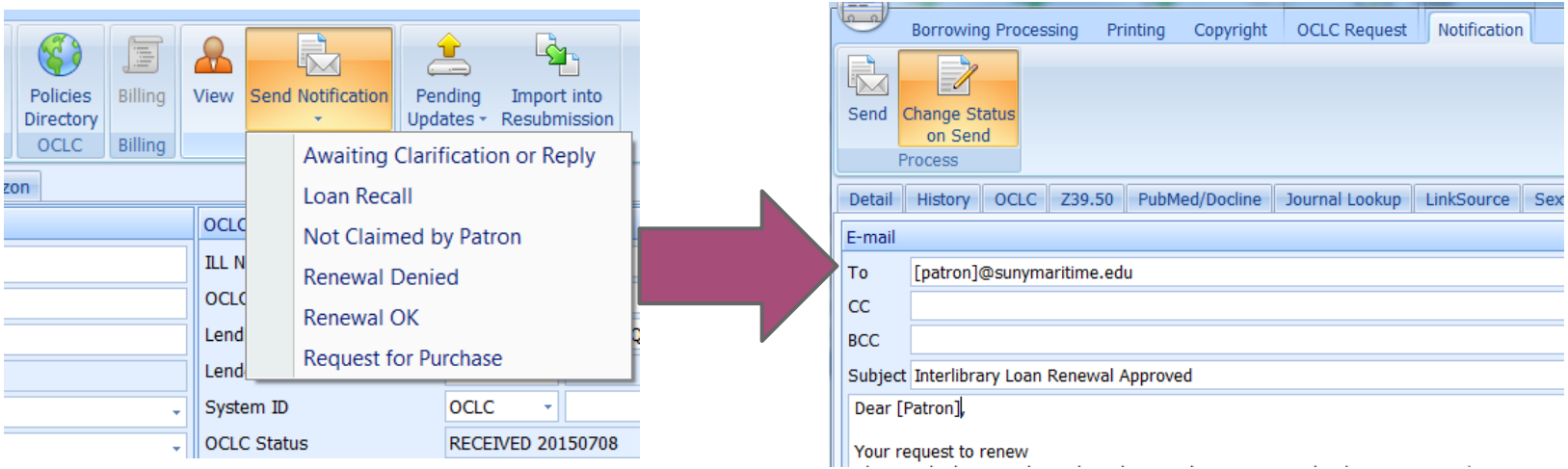
Like with using any email templates you can send as a batch from the queue screen:



Good when you have a lot to send out and don't need to edit the emails before sending.

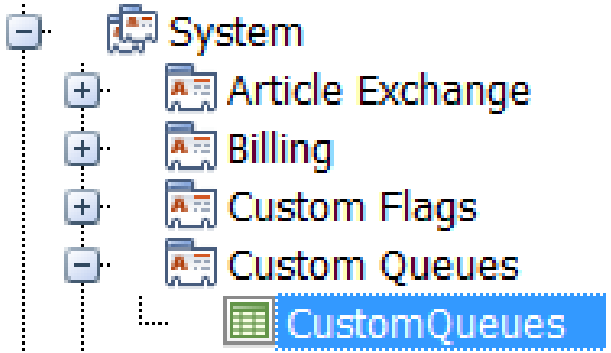
How does Email Routing Work? (pt.3)

Or send from the request (where you can edit the email before sending)



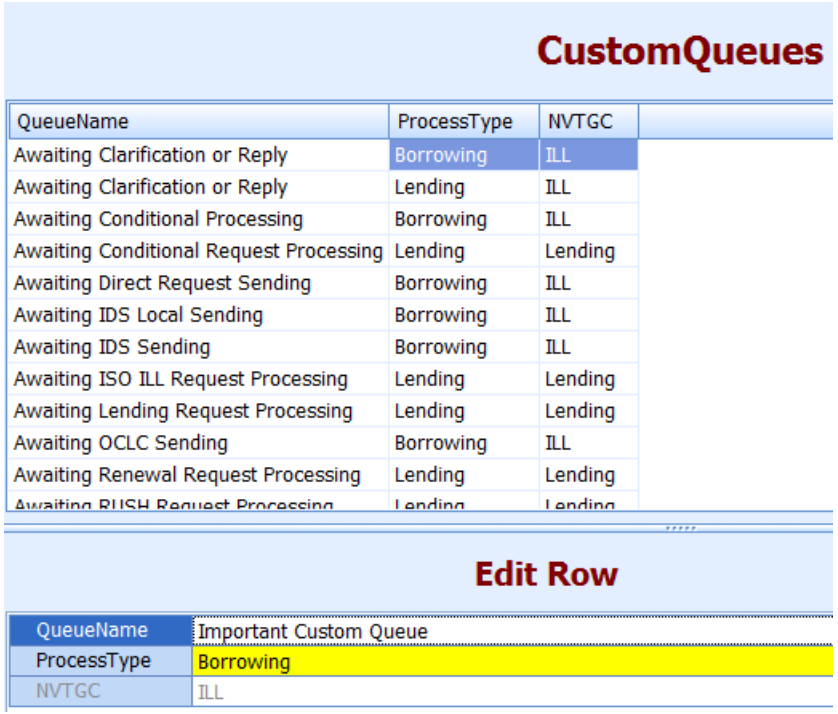
Creating Queues

- Sometimes you'll want to group requests in a queue that doesn't exist
- To create a queue:
  - Customization Manager -> System -> Custom Queues -> Custom Queues



Creating Queues

- Like with other things in CM- two choices:
  - New Record or Copy Record
- Set Process Type and give Queue a name
  - Make sure to save!

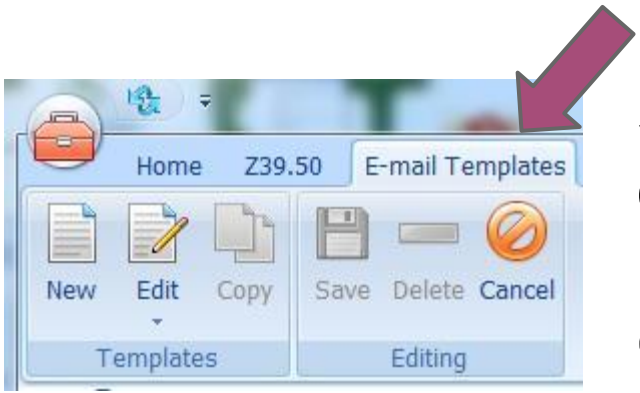


Remember!

- You will need to enter it exactly as written here in the routing rule
- Unless you’re on 8.6 already, your patrons can see the name of the queue in tracking
  - In 8.6 you can assign aliases to queues patrons can see

Check that email exists or create one

Go to the Email Templates tab in the Customization Manager

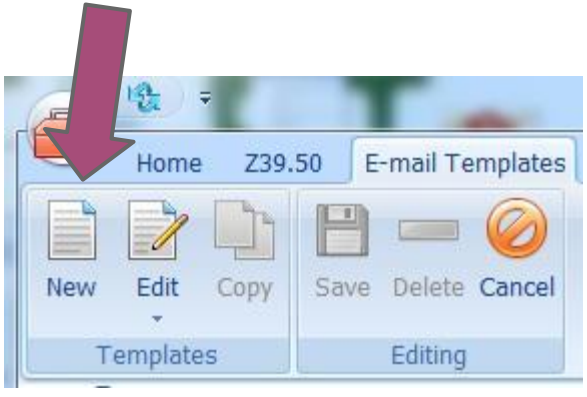


Search for the Email template you want or click on New to create one.

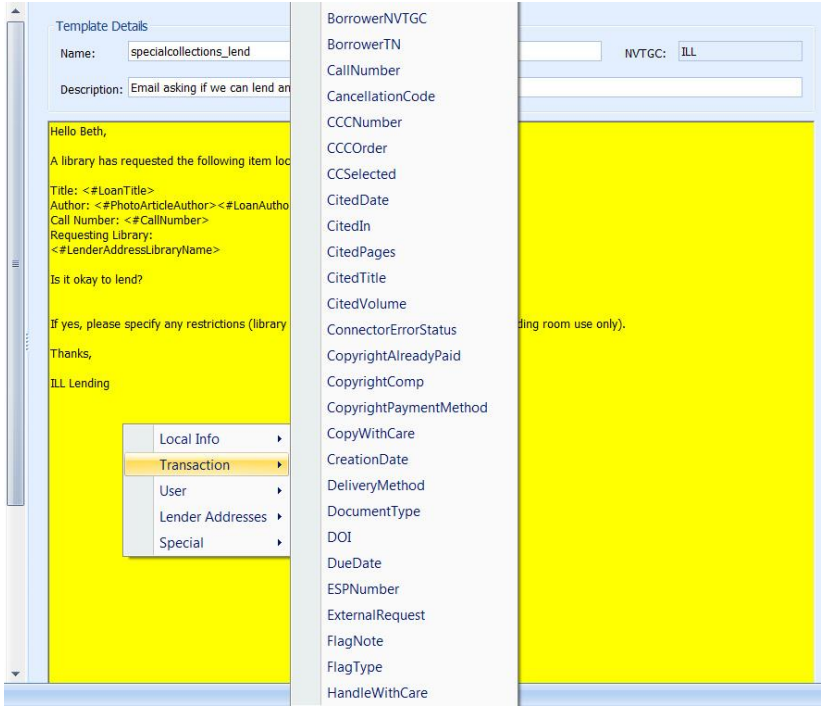
Once you find the Email Template, copy the name

Create an Email

- Go to the E-mail Template tab and click on New



- Right click in email to find a field name

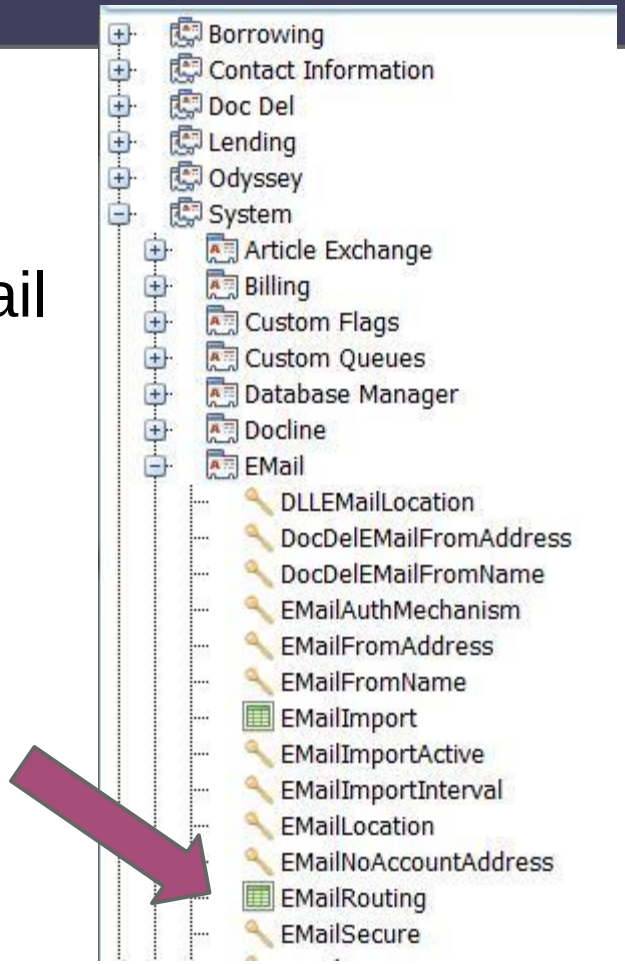


Creating a rule

Go to Email Routing

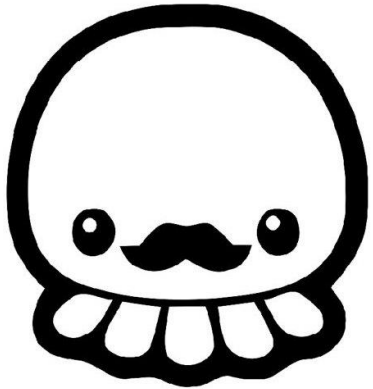
- In the left menu go to: System - Email
- EmailRouting

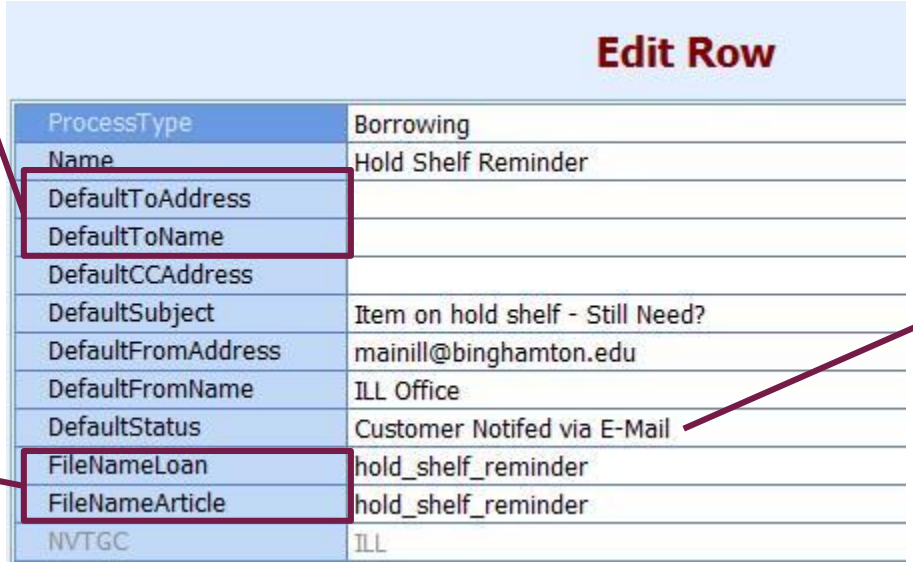
Choose New Record to create one.



Creating a rule pt 2

- Fill out the fields
- Leave these blank if emailing the patron





Edit Row

ProcessType	Borrowing
Name	Hold Shelf Reminder
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Item on hold shelf - Still Need?
DefaultFromAddress	mainill@binghamton.edu
DefaultFromName	ILL Office
DefaultStatus	Customer Notifed via E-Mail
FileNameLoan	hold_shelf_reminder
FileNameArticle	hold_shelf_reminder
NVTGC	ILL

- Paste name of the email here

- Status the record is in after you send the email

Catalog Error

Edit Row

ProcessType	Borrowing
Name	Catalog Error
DefaultToAddress	Scard@binghamton.edu
DefaultToName	Sandy Card
DefaultCCAddress	mainill@binghamton.edu
DefaultSubject	ILL - Error in the Catalog
DefaultFromAddress	mainill@binghamton.edu
DefaultFromName	
DefaultStatus	
FileNameLoan	catalog_error
FileNameArticle	catalog_error
NVTGC	ILL

Rule

Email

Dear Sandy,

While looking up the following citation:

Title: <#PhotoJournalTitle><#LoanTitle>
Volume/Issue: <#PhotoJournalVolume> / <#PhotoJournalIssue>
Author: <#PhotoArticleAuthor><#LoanAuthor>
Year: <#PhotoJournalYear>
Call Number: <#CallNumber>

We have noticed the following error in the catalog:

Spelling Error
Call Number is Incorrect
Library Location Error
Library Holdings Error
Bad Link/Incorrect URL

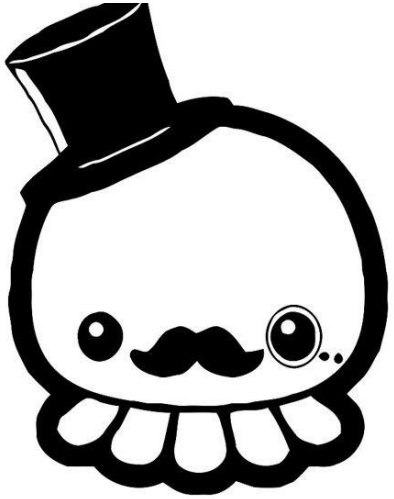
Description of the error:

Invoice Request

ProcessType	Borrowing
Name	Overdue Invoice request
DefaultToAddress	(paste lend lib's email here)
DefaultToName	
DefaultCCAddress	
DefaultSubject	Interlibrary Loan Replacement Charges
DefaultFromAddress	mperez@binghamton.edu
DefaultFromName	Binghamton University ILL Office
DefaultStatus	Checked Out to Customer
FileNameLoan	invoice_request
FileNameArticle	
NVTGC	ILL

Rule

Email



Hello,

We're having trouble getting this back from a patron.

Loan Title: <#LoanTitle>
Loan Author: <#LoanAuthor>
ILL#: <#ILLNUMBER>

Can you please send us an invoice?

Invoice sent to patron

Email

Dear <#FirstName> <#LastName>,

The lending library has issued replacement charges for the following <#DocumentType> you borrowed th

ILL TN: <#TransactionNumber>
Title: <#PhotoJournalTitle><#LoanTitle>
Author: <#PhotoArticleAuthor><#LoanAuthor>
Due Date: <#DueDate>

Per our billing policy, you will be responsible for these charges. You have until [DATE] to return this item or the following will be debited to your library account:

Replacement cost: $
Processing fee: $
Total: $

Rule

ProcessType	Borrowing
Name	Overdue Invoice Notification
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Urgent ILL item Overdue - Bill
DefaultFromAddress	mainill@binghamton.edu
DefaultFromName	Binghamton University ILL Office
DefaultStatus	Checked Out to Customer
FileNameLoan	overdue_bill
FileNameArticle	
NVTGC	ILL

Question for a Patron

Email

Queue

QueueName	Awaiting Clarification or Reply
ProcessType	Borrowing
NVTGC	ILL

Rule

ProcessType	Borrowing
Name	Awaiting Clarification or Reply
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Question about your interlibrary loan request
DefaultFromAddress	library@sunymaritime.edu
DefaultFromName	SUNY Maritime ILL Department
DefaultStatus	Awaiting Clarification or Reply
LoanTemplate	borrowingquestion
ArticleTemplate	borrowingquestion
NVTGC	ILL

Template Details

Name: borrowingquestion NVTGC: ILL

Description: General Question Email

E-mail | SMS

From Name: <#LocalInfo.SystemName> From Address: libr

To Name: To Address:

CC Address: BCC Address:

Subject: Question about your recent interlibrary loan reuqest

Dear <#User.FirstName> <#User.LastName>,

SUNY Maritime College Interlibrary Loan

Email Acquisitions/Collection Dev.

Email

Template Details

Name: forpurchase_staff

Description: Request to purchase item- for Acq Staff

E-mail | SMS

From Name: <#LocalInfo.SystemName>

From Address: library@sunymar

To Name: libacq@sunymaritime.edu

To Address:

CC Address:

BCC Address:

Subject: Request for purchase from ILL

Dear [Name of your Acquisitions Contact Person],

A patron has requested for us to borrow the following item, which we would like to be considered for purchase instead:

Title: <#Transaction.LoanTitle>
Author: <#Transaction.LoanAuthor>
Year: <#Transaction.LoanDate>
Edition: <#Transaction.LoanEdition>
Publisher: <#Transaction.LoanPublisher>
ISBN: <#Transaction.ISSN>

Please let us know if the library will be purchasing this item and if so, when the item arrives so the patron can be notified.

Thank you,
[ILL Department]

Queue

QueueName	Requested for Purchase
ProcessType	Borrowing
NVTGC	ILL

Rule

ProcessType	Borrowing
Name	Request for Purchase
DefaultToAddress	libacq@sunymaritime.edu
DefaultToName	[Your Acq/CD Person]
DefaultCCAddress	
DefaultSubject	Request to purchase material requested through ILL
DefaultFromAddress	library@sunymaritime.edu
DefaultFromName	ILL Department
DefaultStatus	Requested for Purchase
LoanTemplate	forpurchase_staff
ArticleTemplate	
NVTGC	ILL

Email Routing Discussion

- What are some email routing that you use?
- Are there things that you would like to be able to set up rules for?
- Do you have any questions about what is possible through routing rules?

Borrowing Loan Renewals

To let patrons know their renewal requests were approved or denied

- Rule returns item to Checked Out to Customer once notification is sent

Email

Template Details

Name: renewalok NVTGC: ILL

Description: Renewal Request Approved

E-mail | SMS

From Name: From Address:

To Name: To Address:

CC Address: BCC Address:

Subject:

Dear <#User.FirstName> <#User.LastName>,

Your request to renew
<#Transaction.LoanTitle>
Transaction number <#Transaction.TransactionNumber>
has been approved.

Your item is now due on <#Transaction.DueDate>.

If you have any questions, please contact us at <#LocalInfo.GeneralEMailAddress> or <#LocalInfo.GeneralPhone>.

SUNY Maritime College Interlibrary Loan

Rule

ProcessType	Borrowing
Name	Renewal OK
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Interlibrary Loan Renewal Approved
DefaultFromAddress	library@sunymaritime.edu
DefaultFromName	SUNY Maritime ILL Department
DefaultStatus	Checked Out to Customer
LoanTemplate	renewalok
ArticleTemplate	renewalok
NVTGC	ILL

Borrowing Loan Renewal OK

This function:

- Identifies the system note that is created when the lending library provides a different due date than your system settings
- Reformats the date in the system note, and updates the due date field in the ILLiad transaction based on the due date provided by the lender.
- Sends email to the patron notifying them of new due date
- Routes transaction to “Checked out to Customer” status.

You can configure for:

- Which email template to use (in the CM) and email subject
- Where to route after the message is sent:
  (Checked Out to Customer)

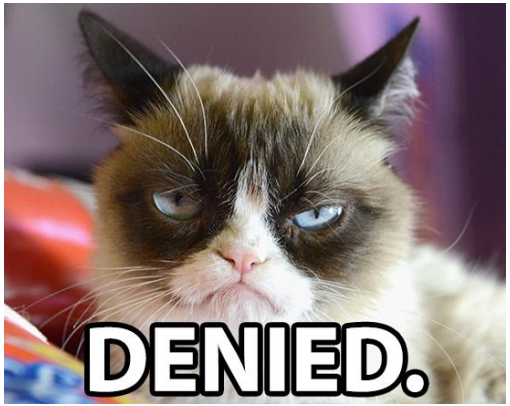
Borrowing Loan Renewal Denied

This function:

- Identifies system note that is created when the lending library provides new due date after renewal request is denied
- Reformats the date in the system note, and updates the due date field in the ILLiad transaction based on the due date provided by the lender.
- Sends email to the patron notifying them that their renewal request has been denied
- Routes transaction to “Checked out to Customer” status.

You can configure for:

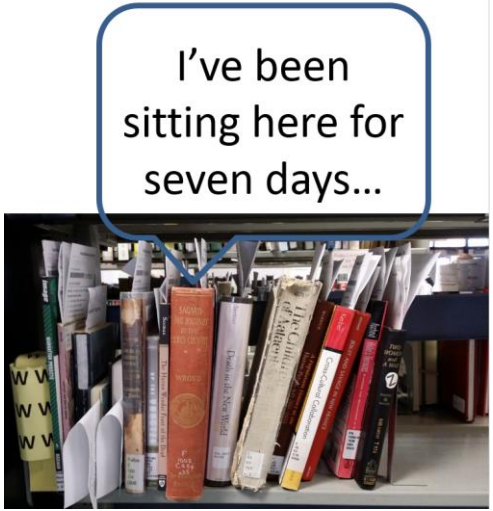
- Which email template to use (in the CM) and email subject
- Where to route after the message is sent:
  (Checked Out to Customer)



IDS Logic: Pickup Reminder

You can configure for:

- Transaction Status (Customer Notified via E-Mail)
- How long the TN has been in the queue (7 days)
- Which email template (in CM)
- What email subject
- What to add in the TN notes



Logic Ideas

What emails and processes do you think would be useful to automate sending through a Logic Rule/Custom Emailer?

Print Templates

Print Templates

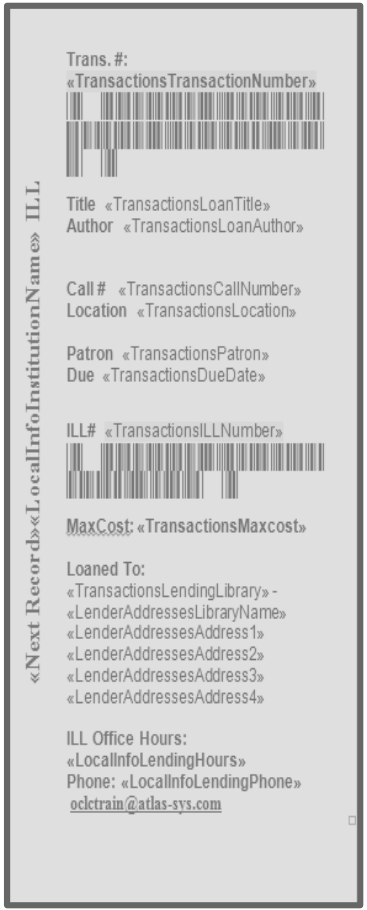
8.6 Upgrade Impact

«IT *WILL* AFFECT YOUR PRINT TEMPLATES»

HOW ARE THEY AFFECTED?

Addresses printed on Lending and Borrowing templates are now pulled from:
The **ShippingAddresses** table (which contains OCLC constant data)
NOT
The **LenderAddresses** table.

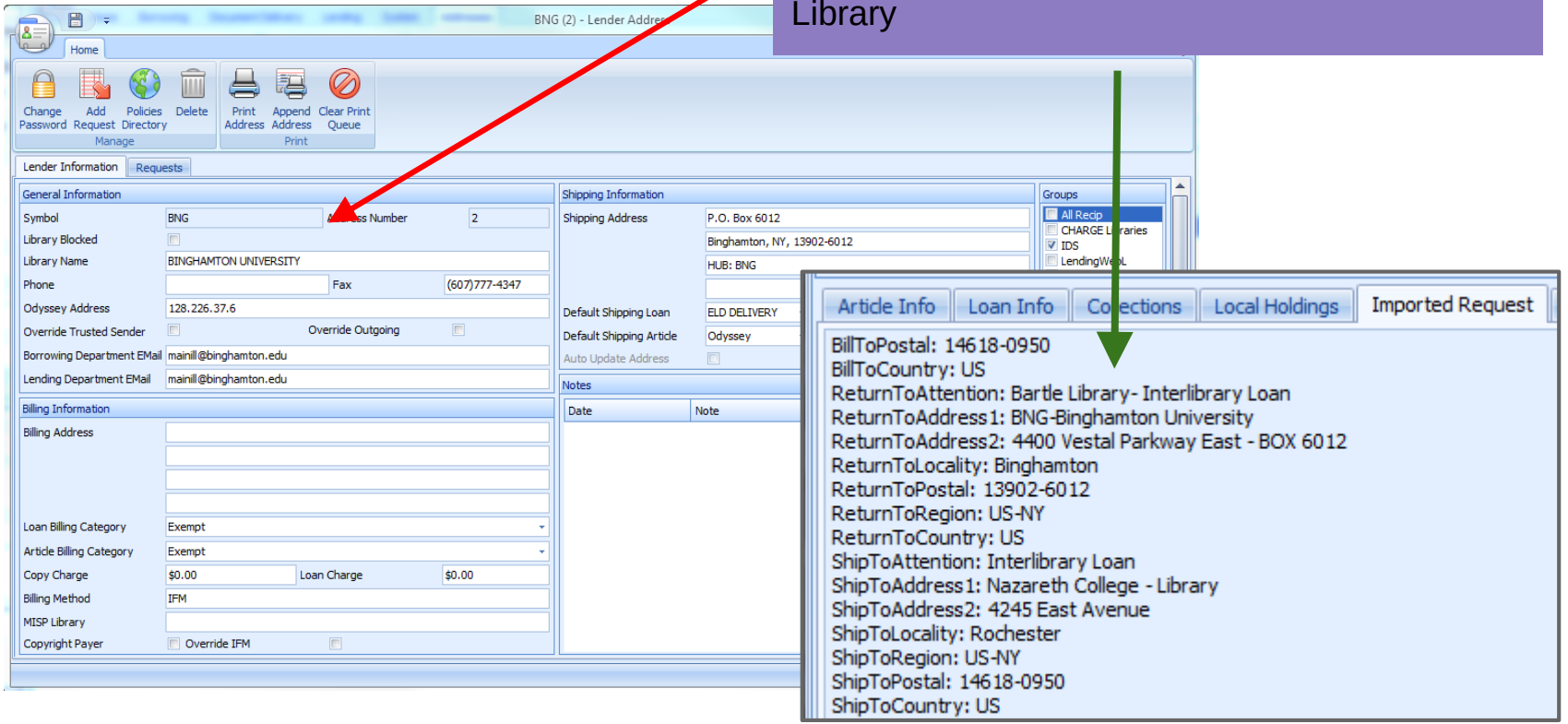
https://prometheus.atlas-sys.com/display/illiad/Print+Template+Addresses



SAY WUT

In other words...

Addresses will no longer be pulled from your Maintenance Address Forms, but from the Constant Data form filled out by the Lending Library



On the templates….

LenderAddresses_LibraryName, *LenderAddresses_Address1*, etc. are now coming from **Constant Data**

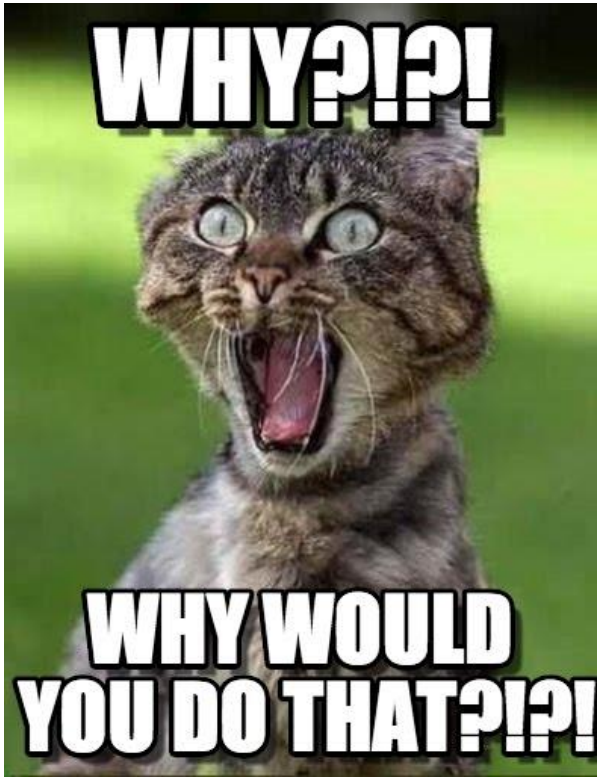
and field names for addresses in your Maintenance Address Form have been *renamed:*

Example: LA_LibraryName, LA_Address1, etc

What?! Why?!

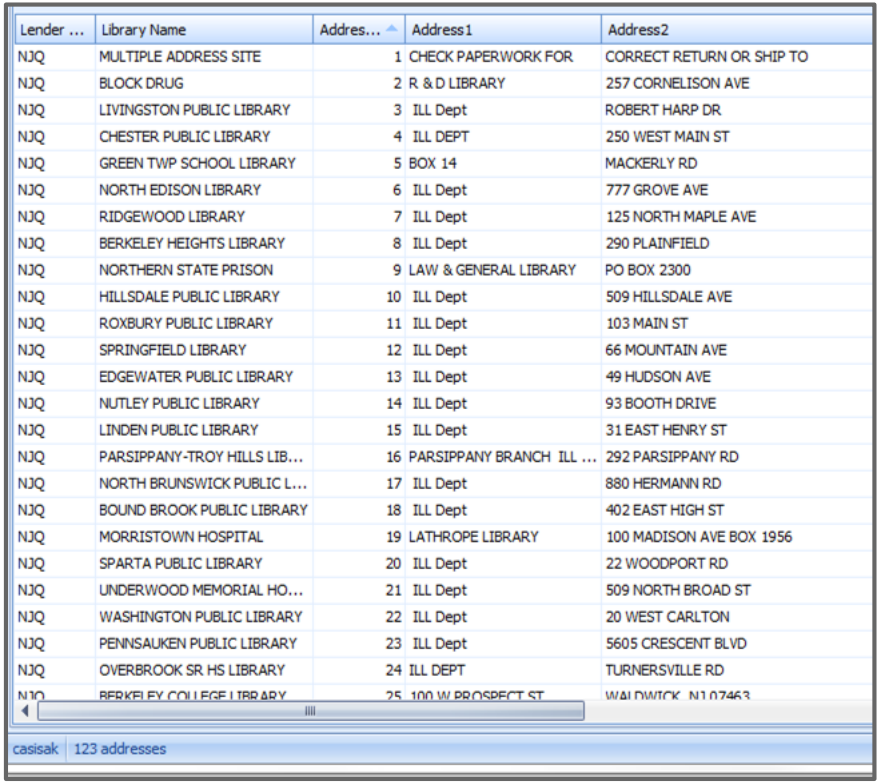
- One symbol/multiple addresses
- Current addresses in CD vs. outdated Maintenance Address Forms

And...to mess up your customized labels (ELD)



Multiple Addresses Example

- Consortia out of New Jersey - NJQ
- 120 + libraries associated with symbol



Lender ...	Library Name	Addres...	Address1	Address2
NJQ	MULTIPLE ADDRESS SITE	1	CHECK PAPERWORK FOR	CORRECT RETURN OR SHIP TO
NJQ	BLOCK DRUG	2	R & D LIBRARY	257 CORNELISON AVE
NJQ	LIVINGSTON PUBLIC LIBRARY	3	ILL Dept	ROBERT HARP DR
NJQ	CHESTER PUBLIC LIBRARY	4	ILL DEPT	250 WEST MAIN ST
NJQ	GREEN TWP SCHOOL LIBRARY	5	BOX 14	MACKERLY RD
NJQ	NORTH EDISON LIBRARY	6	ILL Dept	777 GROVE AVE
NJQ	RIDGEWOOD LIBRARY	7	ILL Dept	125 NORTH MAPLE AVE
NJQ	BERKELEY HEIGHTS LIBRARY	8	ILL Dept	290 PLAINFIELD
NJQ	NORTHERN STATE PRISON	9	LAW & GENERAL LIBRARY	PO BOX 2300
NJQ	HILLSDALE PUBLIC LIBRARY	10	ILL Dept	509 HILLSDALE AVE
NJQ	ROXBURY PUBLIC LIBRARY	11	ILL Dept	103 MAIN ST
NJQ	SPRINGFIELD LIBRARY	12	ILL Dept	66 MOUNTAIN AVE
NJQ	EDGEWATER PUBLIC LIBRARY	13	ILL Dept	49 HUDSON AVE
NJQ	NUTLEY PUBLIC LIBRARY	14	ILL Dept	93 BOOTH DRIVE
NJQ	LINDEN PUBLIC LIBRARY	15	ILL Dept	31 EAST HENRY ST
NJQ	PARSIPPANY-TROY HILLS LIB...	16	PARSIPPANY BRANCH ILL ...	292 PARSIPPANY RD
NJQ	NORTH BRUNSWICK PUBLIC L...	17	ILL Dept	880 HERMANN RD
NJQ	BOUND BROOK PUBLIC LIBRARY	18	ILL Dept	402 EAST HIGH ST
NJQ	MORRISTOWN HOSPITAL	19	LATHROPE LIBRARY	100 MADISON AVE BOX 1956
NJQ	SPARTA PUBLIC LIBRARY	20	ILL Dept	22 WOODPORT RD
NJQ	UNDERWOOD MEMORIAL HO...	21	ILL Dept	509 NORTH BROAD ST
NJQ	WASHINGTON PUBLIC LIBRARY	22	ILL Dept	20 WEST CARLTON
NJQ	PENNSAUKEN PUBLIC LIBRARY	23	ILL Dept	5605 CRESCENT BLVD
NJQ	OVERBROOK SR HS LIBRARY	24	ILL DEPT	TURNERSVILLE RD
NJQ	BERKELEY COLLEGE LIBRARY	25	100 W PROSPECT ST	WALDWICK, NJ 07463

casisak | 123 addresses

NOW WHAT?

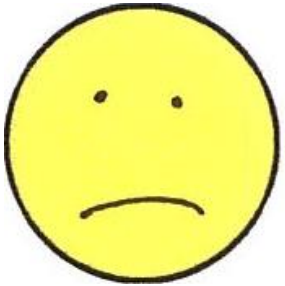
Be Nice: Update Your Constant Data

1) In ILLiad
2) Or WorldShare

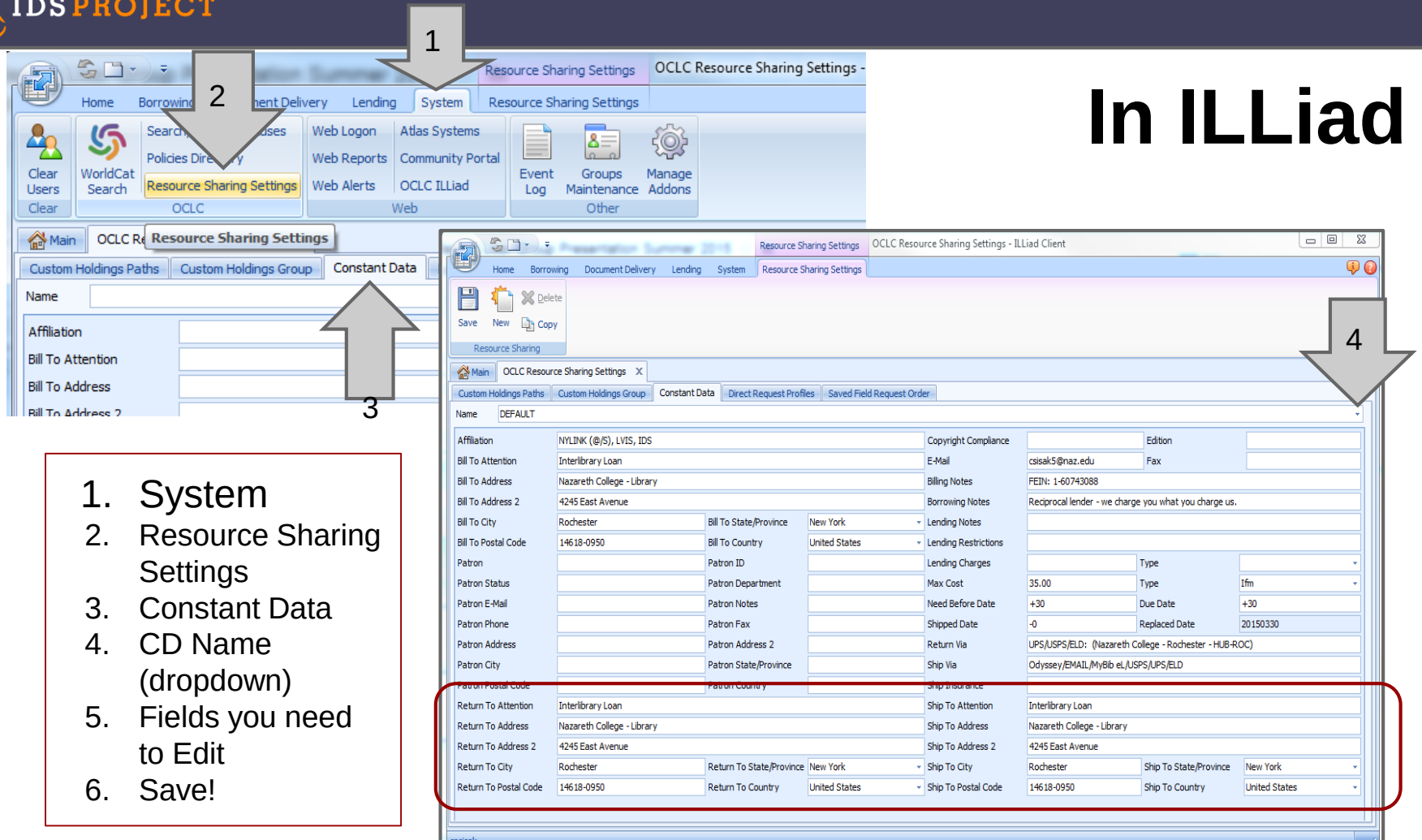
(It's easy!)

Before This Happens:

ILL/Nazareth College/Lorette Wilmot Library/4245 East Avenue/Rochester/NY/14618

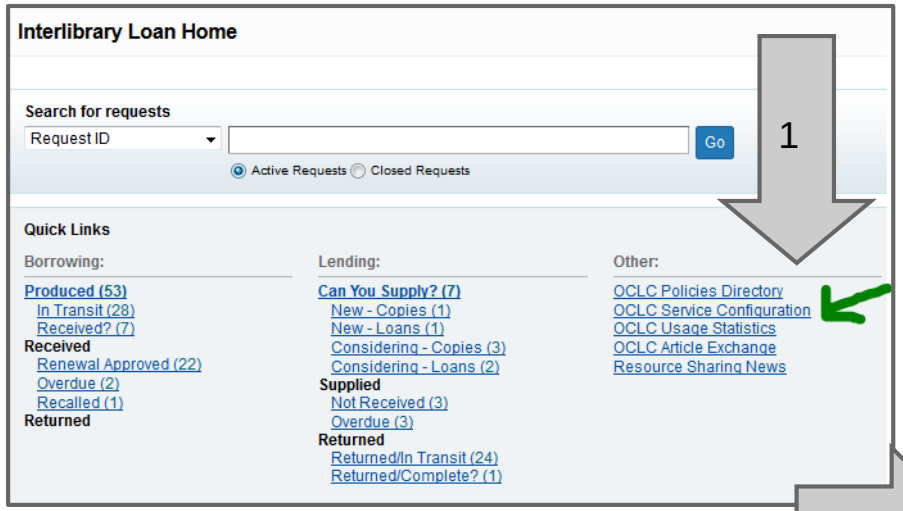


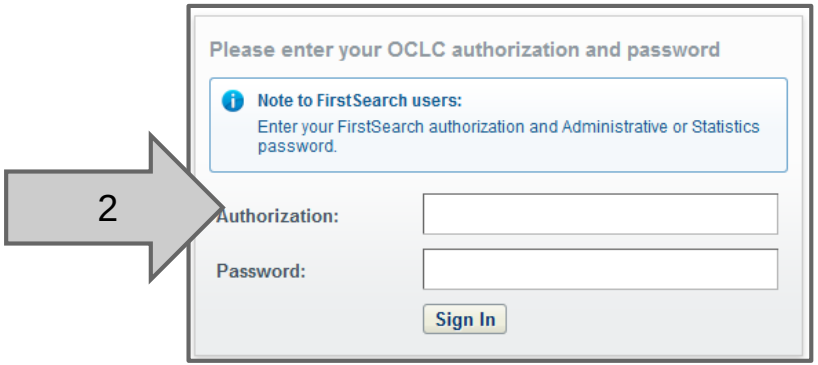
In ILLiad

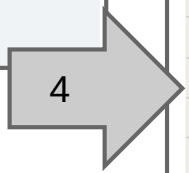


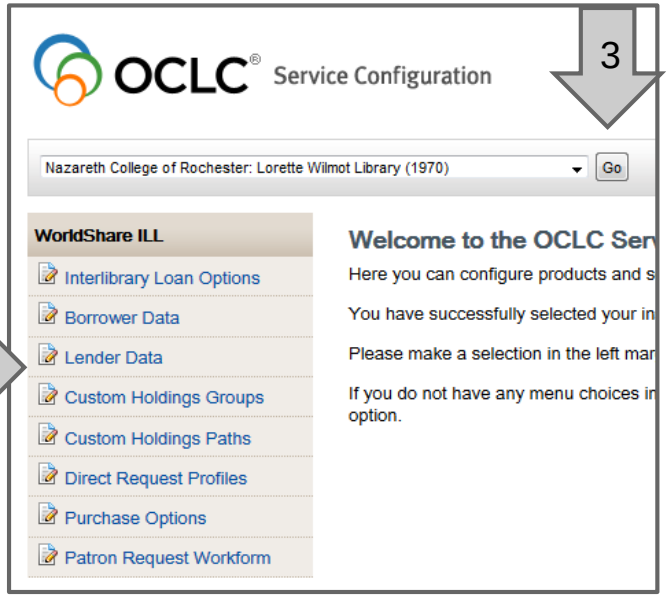
1. System
2. Resource Sharing Settings
3. Constant Data
4. CD Name (dropdown)
5. Fields you need to Edit
6. Save!

In WorldShare

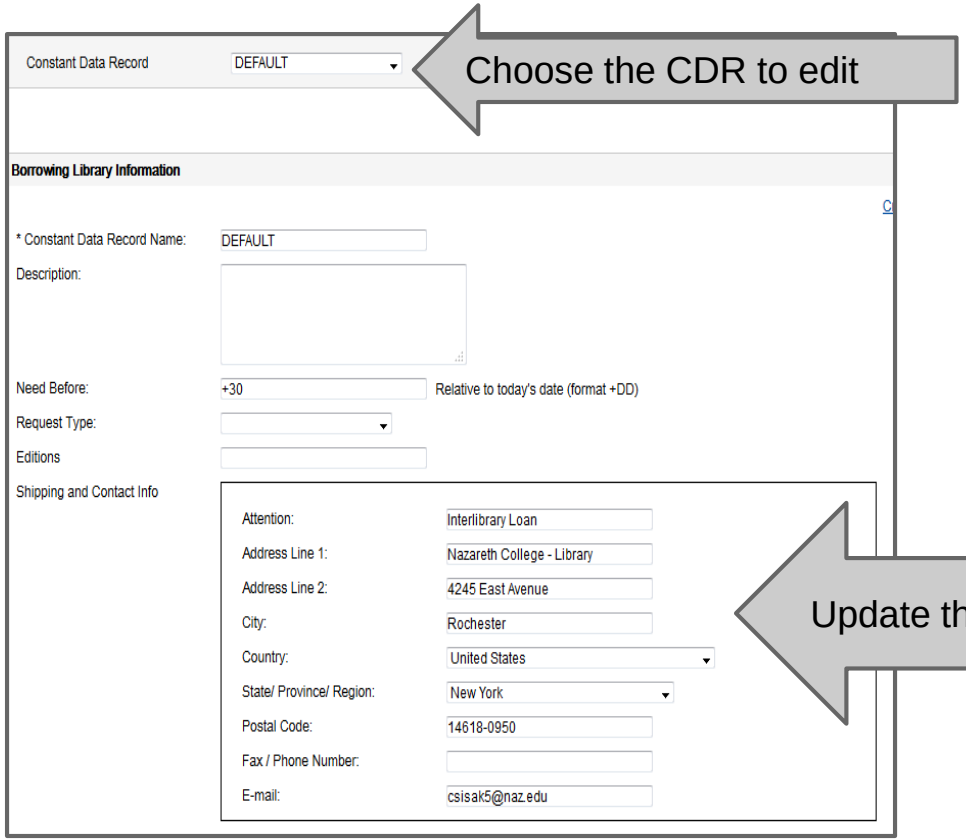








Don't know yours? Find these keys in the CM:
OCLCILLAuthorization
OCLCILLPassword



PSA:

Never been in here? Check out the **OCLC Usage Statistics** section for some fun/informative reports!

you *customized* your shipping labels by indicating a shipping method in the

Maintenance Address Forms?

General Information

Symbol	BNG	Address Number	2
Library Blocked	☐		
Library Name	ELD DELIVERY - BINGHAMTON UNIVERSITY		
Phone		Fax	(607)777-4347

Wait, you mean all that work for nothing?

Sorta, let's talk about our options.

Mailed under Section 135.14 Postal Manual
LIBRARIES MATERIALS

POSTMASTER: This parcel may be opened for postal inspection if necessary.

FROM: Interlibrary Loan, Lorette Wilmot Library
Nazareth College of Rochester, PO Box 18950,
Rochester, NY 14618-0950

RETURN POSTAGE GUARANTEED

ELD DELIVERY- BINGHAMTON UNIVERSITY
P.O. Box 6012
Binghamton, NY, 13902-6012
HUB: BNG

Is there another way to designate shipping method?

SUNY Canton Interlibrary Loan
Southworth Library
Canton, NY 13617

ELD DELIVERY
SUNY Canton: ZCM
July 24, 2015

MAILED UNDER SECTION 135.14 POSTAL MANUAL
LIBRARY MATERIALS
POSTMASTER: Parcel may be opened for postal inspection if necessary.
RETURN POSTAGE GUARANTEED

SUNY POTSDAM
CRUMB LIBRARY
44 PIERREPONT AVE.
POTSDAM, NY 13676
HUB: SYR

SUNY Canton Int
Southworth
Canton, NY

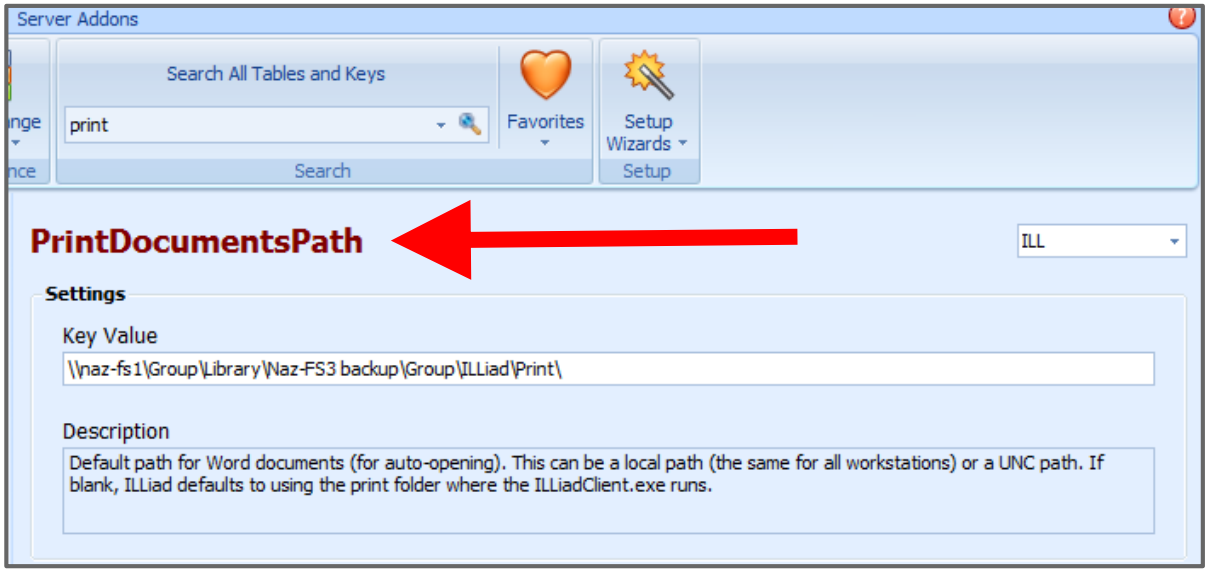
Texas Tech University Library ILL
Dept.
Box 40002
18th & Boston
Lubbock, Texas 79409-0002
United States

Where's Waldo?
I mean, the Print Templates!

They hide:

1) on your local machine (c:\Program Files (x86)\ILLiad\Print|
2) network drive
3) on everyone else's machine but yours

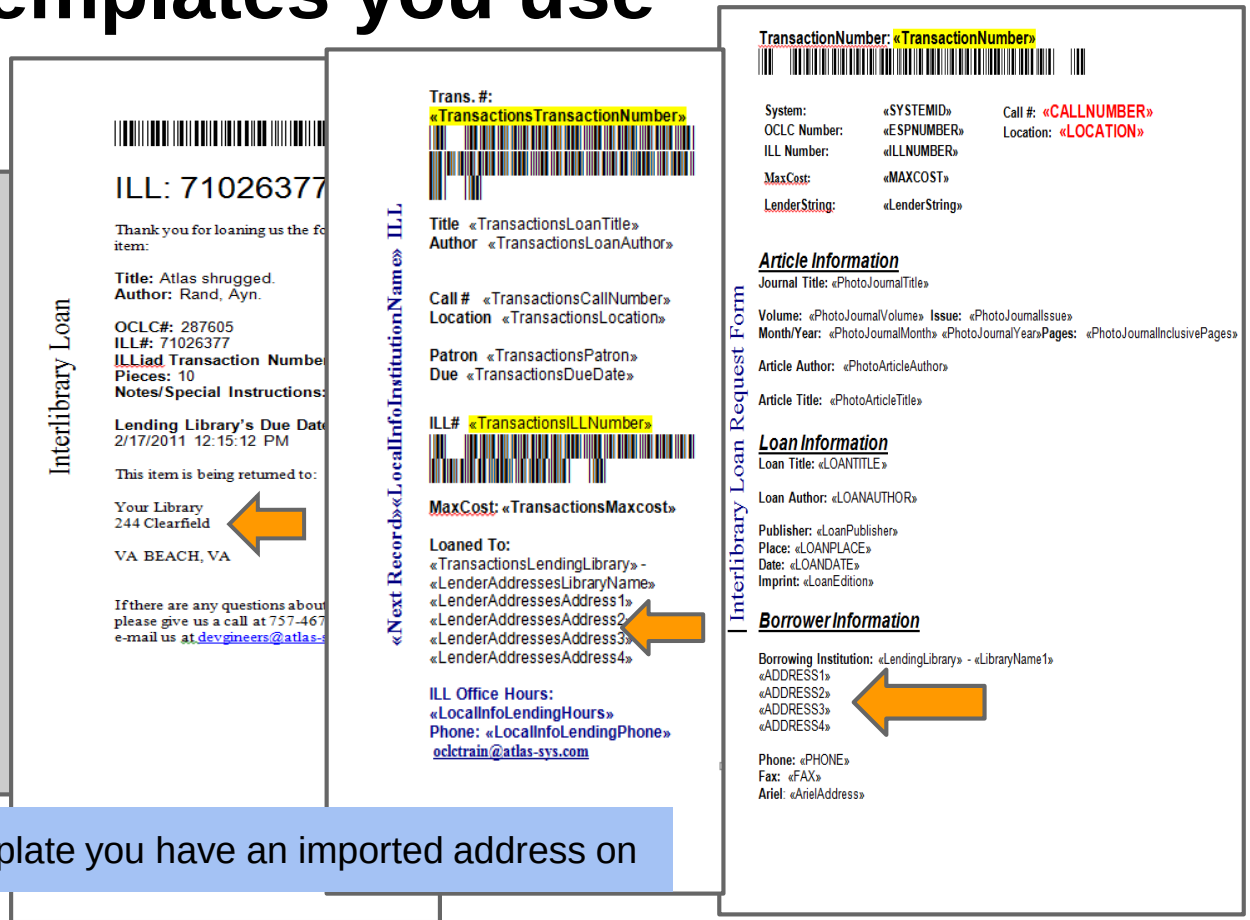
Remember: your .xls files live in the currently logged in user's local Documents folder under ILLiad\Print\



Identify which templates you use

Templates Affected:

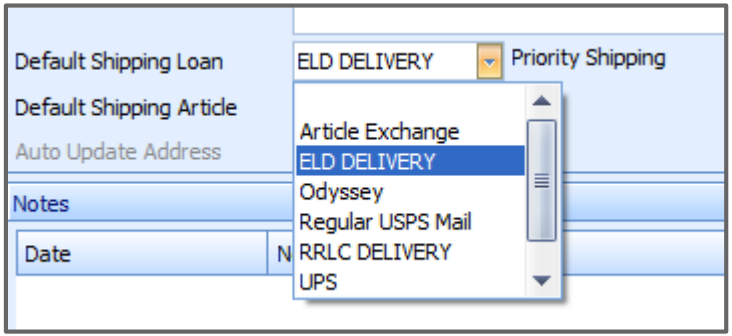
- BorrowingLoanLabels.doc
- BorrowingReturnAddressLabels.doc
- LendingLoanSlips.doc
- Lending Rapid Stacks Searching
- LendingLoanShippingLabels. doc
- LendingArticleShippingLabels .doc
- Lending Secondary Label Printing
- Lending Overdues
    a. Ex. LendingOverdueLetter1.doc
- PrintRequest.doc



Basically, any template you have an imported address on

Beginning your “Smart” Template Customization

1. Use the dropdown Default Shipping Loan field and an If...Then...Else statement.



AND:

2. **use a “hook”**

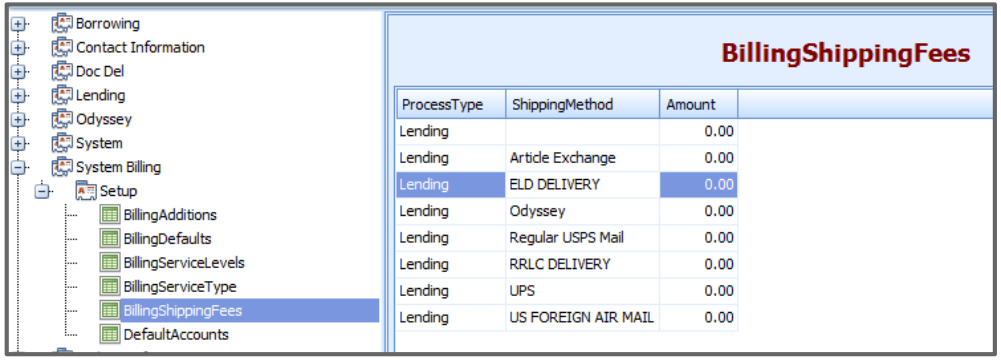
«LenderAddresses_DefaultShippingMethodLoa»

NOTE:
Glen’s silent video:
https://www.youtube.com/watch?v=0vGXIBECl1g&feature=youtu.be&hd=1

How to Add the Delivery Methods

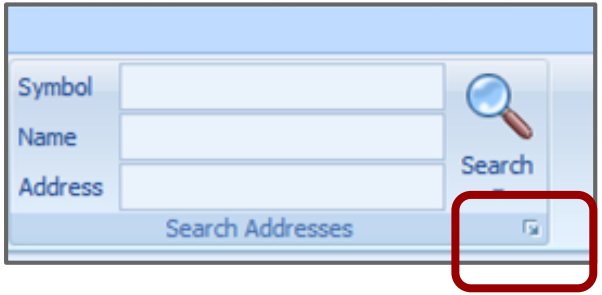
- In Customization Manager select:
  System Billing|Setup|Billing Shipping Fees
- <click> **New Record**
- Process Type = **Lending**
- ShippingMethod = **(your lingo)**
- Amount = **0.00**

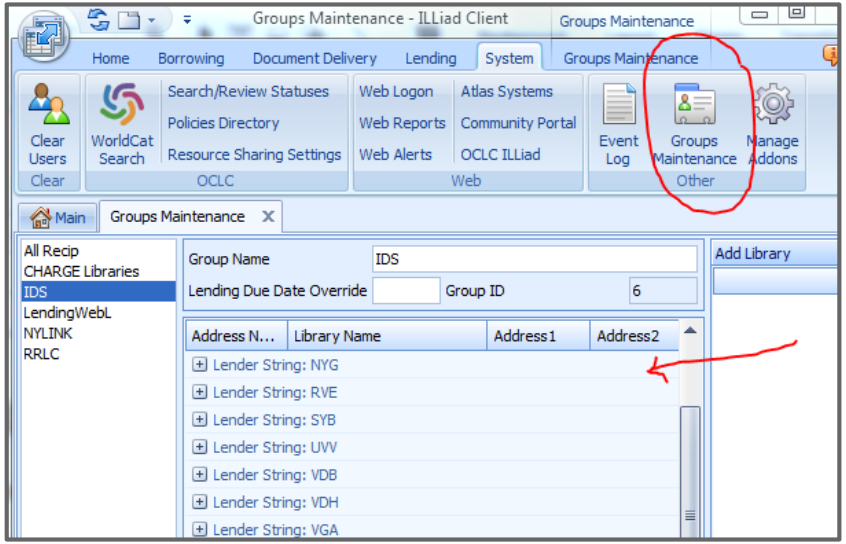
Instant delivery types!



NOTE: make your first option "Shipping Method" a 'blank' by typing a [space] into the Shipping Method space. This will prevent all *NEW* addresses you add from having the default of ELD DELIVERY as their delivery method.

Find your ELDs...



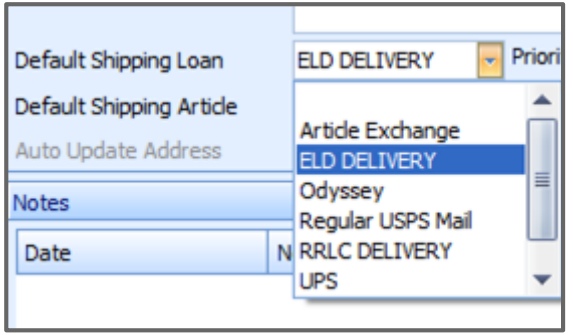


PUBLIC ELD ROSTER - 2015 : PUBLIC_ELD_ROSTER

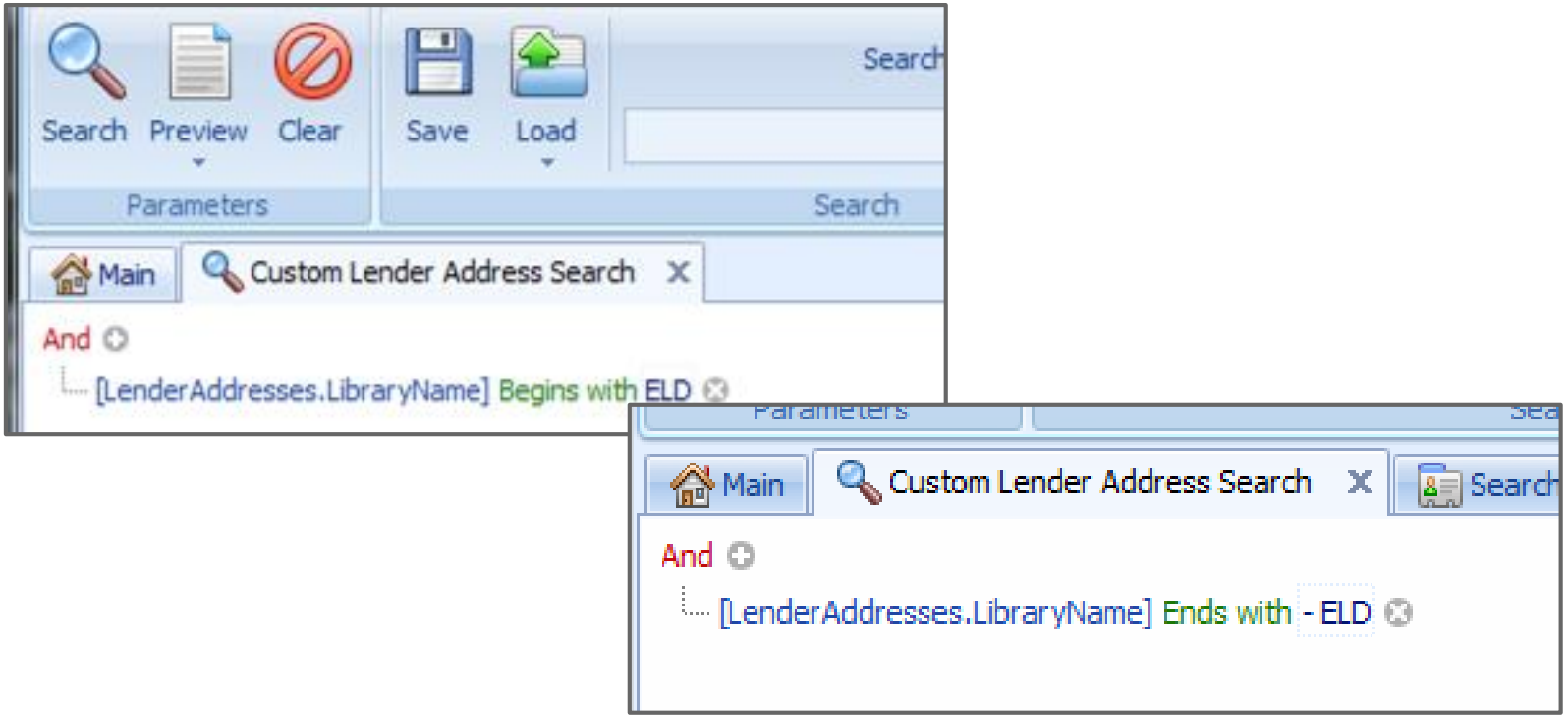
HUB	SYMBOL	INSTITUTION	LibraryNam
NYC	VJA	Adelphi University	Swirbul Libr
NYC	VJA	Adelphi University - Manhattan Center	Manhattan
ALB	VJK	Adirondack, SUNY	
ALB	YZA	Albany Law School	
ALB	NAM	Albany U, SUNY	
ROC	ZAM	Alfred State, SUNY	
ROC	YAH	Alfred University	
ALB	VVP	Bard College	
NYC	VVB	Baruch College, CUNY	
BNG	BNG	Binghamton University, SUNY	
NYC	XMC	Borough of Manhattan Community Col CUNY	
ROC	XBM	Brockport, SUNY	

Locate your ELD libraries to select the "ELD delivery" method.

1) Custom Search for ELDs
2) Group Maintenance Form
3) Using the ELD Roster



A few custom searches...

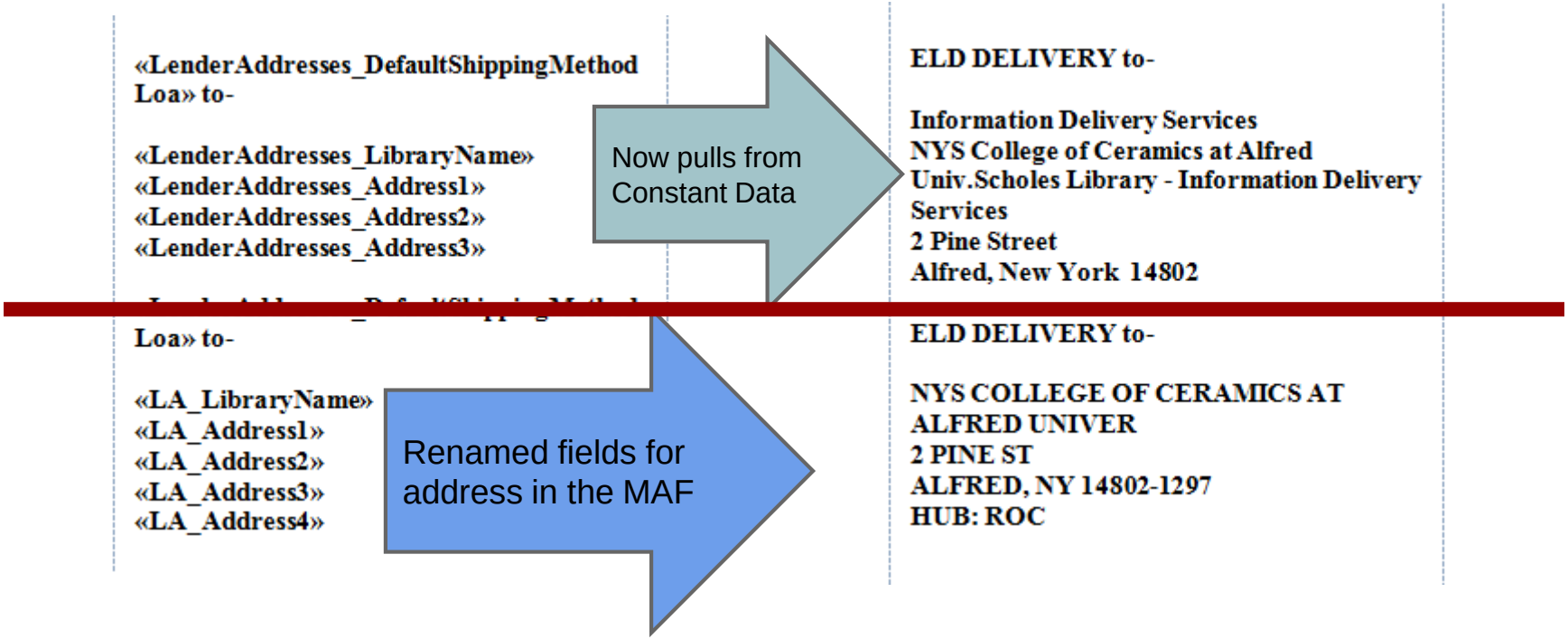


Print Templates

BEST PRACTICE!

Make a BACK-UP copy *BEFORE* messing with a template!

ELD


«LenderAddresses_DefaultShippingMethod
Loa» to-
«LenderAddresses_LibraryName»
«LenderAddresses_Address1»
«LenderAddresses_Address2»
«LenderAddresses_Address3»
Now pulls from Constant Data
ELD DELIVERY to-
Information Delivery Services
NYS College of Ceramics at Alfred
Univ.Scholes Library - Information Delivery Services
2 Pine Street
Alfred, New York 14802
Loa» to-
«LA_LibraryName»
«LA_Address1»
«LA_Address2»
«LA_Address3»
«LA_Address4»
Renamed fields for address in the MAF
ELD DELIVERY to-
NYS COLLEGE OF CERAMICS AT
ALFRED UNIVER
2 PINE ST
ALFRED, NY 14802-1297
HUB: ROC

Video Tutorial

https://www.youtube.com/watch?v=0vGXIBECl1g&feature=youtu.be&hd=1

Glen Bogardus, thank you!

The “If... Then... Else…” toggle game

1

FROM: Interlibrary Loan, Lorette Wilmot Library
Nazareth College of Rochester, PO Box 18950,
Rochester, NY 14618-0950

RETURN POSTAGE GUARANTEED

«Next Record»
«LenderAddresses_LibraryName»
«LenderAddresses_Address1»
«LenderAddresses_Address2»
«LenderAddresses_Address3»
«LenderAddresses_Address4»

Rochester, NY 14618-0950

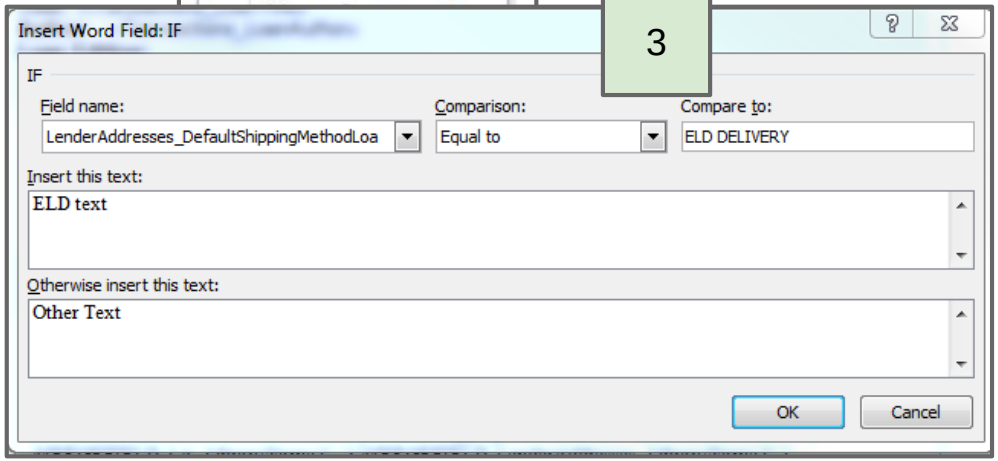
RETURN POSTAGE GUARANTEED

«Next Record»

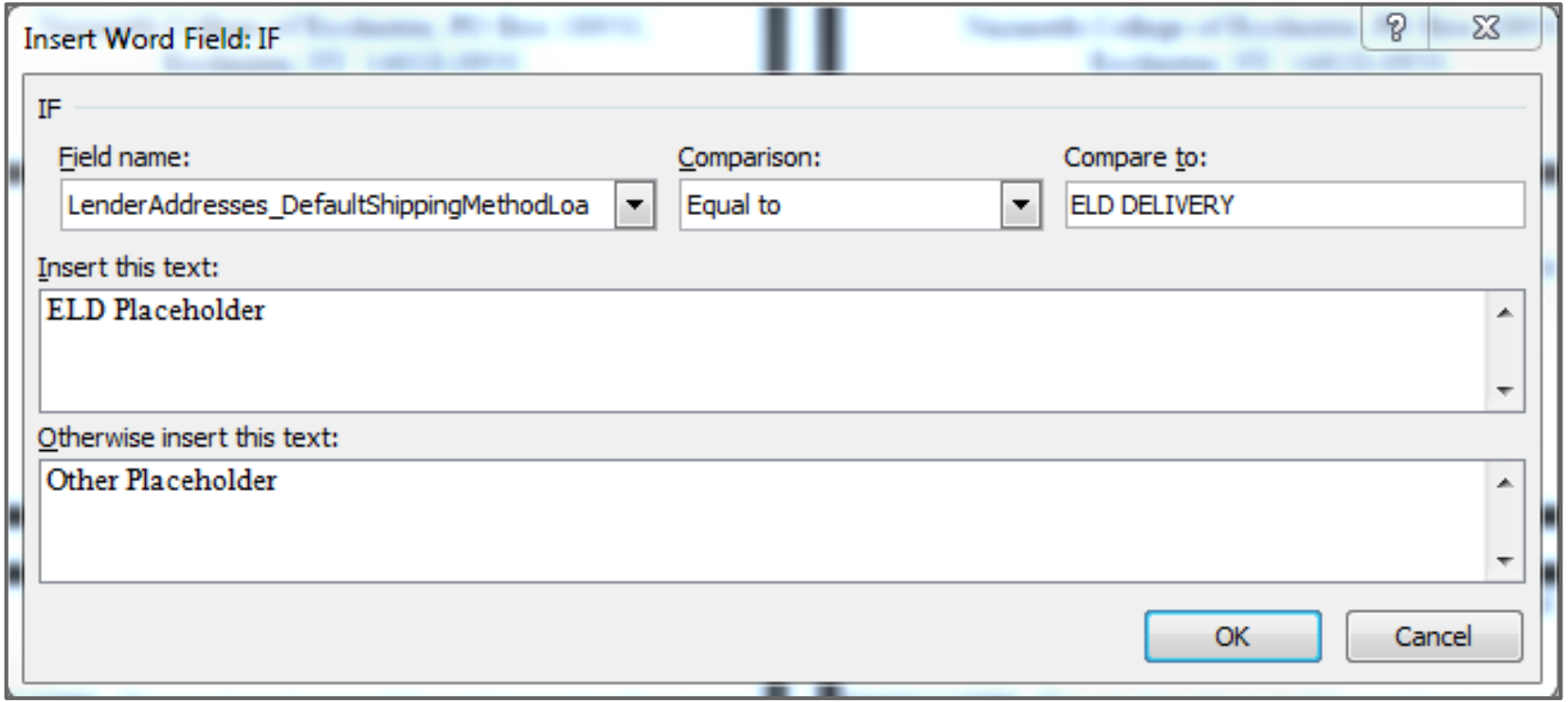
Deleted the info

2

3



What to fill in...



Toggle Codes

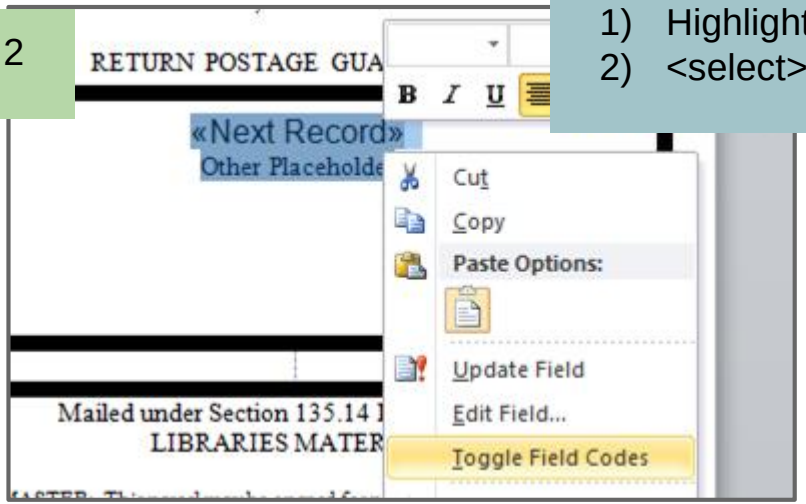
1

RETURN POSTAGE GUARANTEED

«Next Record»
Other Placeholder

Label will look similar

2



1) Highlight all and right <click>
2) <select> Toggle Field Codes

3

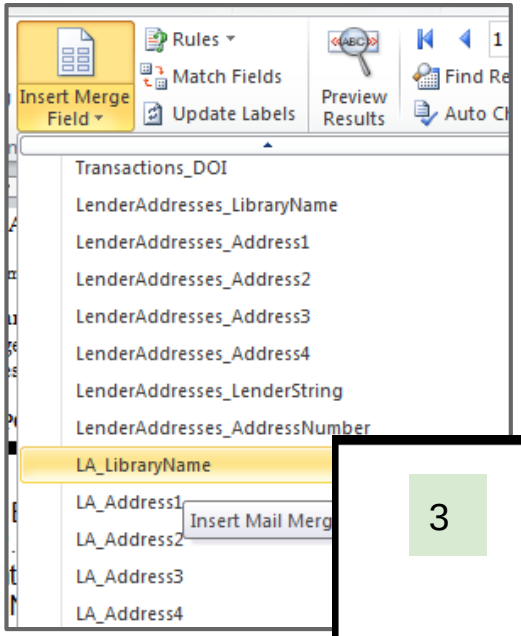
{ NEXT }
{ IF { MERGEFIELD LenderAddresses_DefaultShippingMethodLoa } = "ELD Delivery" "ELD Placeholder" "Other Placeholder" }

3) Your label will look similar

1

{ NEXT }
{ IF { MERGEFIELD LenderAddresses_DefaultShippingMethodLoa } = "ELD Delivery" "ELD Placeholder" "Other Placeholder" }

2



3

«Next Record»
Other ILL

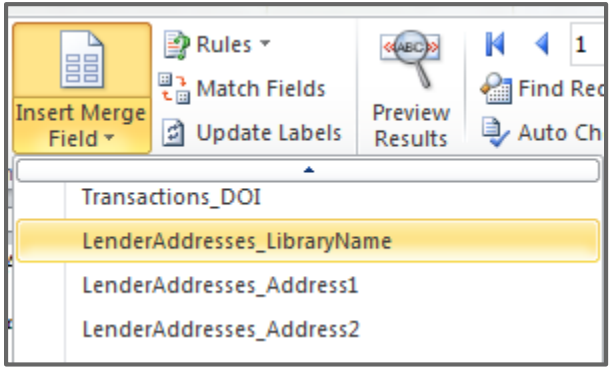
4

1) **Highlight** all and right <click>
2) <select> **Toggle Field Codes**

5

{ NEXT }
{ IF { MERGEFIELD LenderAddresses_DefaultShippingMethodLoa } = "ELD Delivery" "{ MERGEFIELD LA_LibraryName }" "Other Placeholder" }

6



1) **Highlight** all and **Copy/Paste** below

```
{ NEXT }
{ IF { MERGEFIELD
LenderAddresses_DefaultShippingMethodLoa } = "ELD
Delivery" "{ MERGEFIELD LA_LibraryName }" "{
MERGEFIELD LenderAddresses_LibraryName }" }
```

2) Your code is hidden under the last line.
Highlight, **<right click>** and select **Toggle Field Codes**

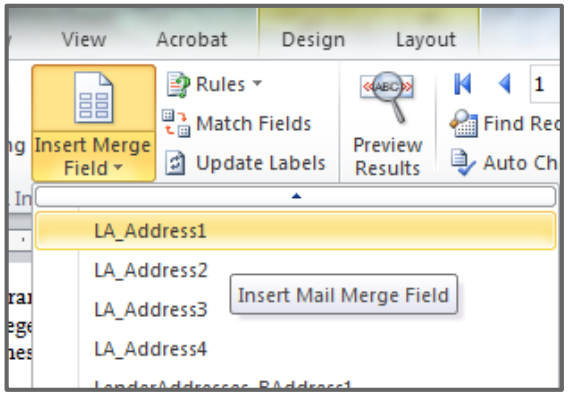
```
{ NEXT }
{ IF { MERGEFIELD
LenderAddresses_DefaultShippingMethodLoa } = "ELD
Delivery" "{ MERGEFIELD LA_LibraryName }" "{
MERGEFIELD LenderAddresses_LibraryName }" }
Other ILL
```

(Ctrl)

3) Highlight the NEXT **MERGEFIELD LA_LibraryName** and Insert Merge Field| **LA_Address1**

NOTE: You could type this in

```
{ NEXT }
{ IF { MERGEFIELD
LenderAddresses_DefaultShippingMethodLoa } = "ELD
Delivery" "{ MERGEFIELD LA_LibraryName }" "{
MERGEFIELD LenderAddresses_LibraryName }" }
{ IF { MERGEFIELD
LenderAddresses_DefaultShippingMethodLoa } = "ELD
Delivery" "{ MERGEFIELD LA_LibraryName }" "{
MERGEFIELD LenderAddresses_LibraryName }" }
```

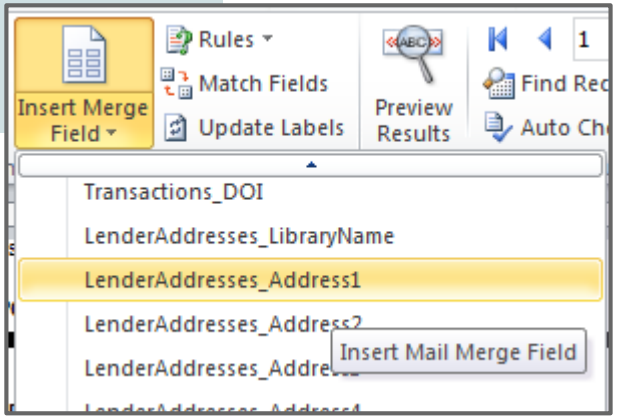


1) Again, reveal your **Toggle Field Codes**

«Next Record»
ILL
{ IF { MERGEFIELD LenderAddresses_DefaultShippingMethodLoa } = "ELD Delivery" "{ MERGEFIELD LA_Address1 }" "{ MERGEFIELD LenderAddresses_LibraryName }" }

2) This time highlight **MERGEFIELD LenderAddresses_LibraryName** and Insert Merge Field| **LenderAddress_Address1**

NOTE: Again, you could type **Address1** replacing **LibraryName**



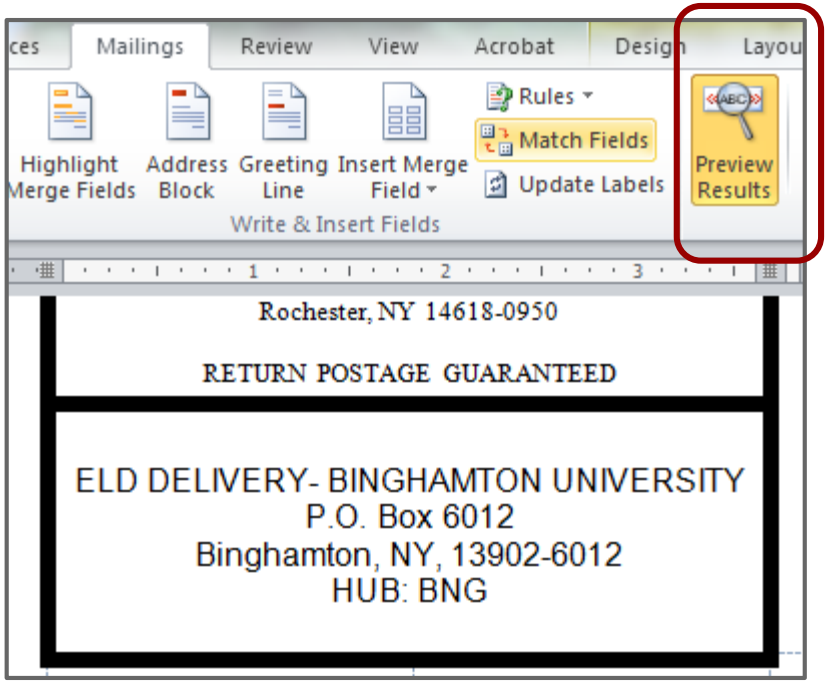
1) TIME SAVER: Highlight all and **Copy/Paste <u>THREE TIMES</u>** below

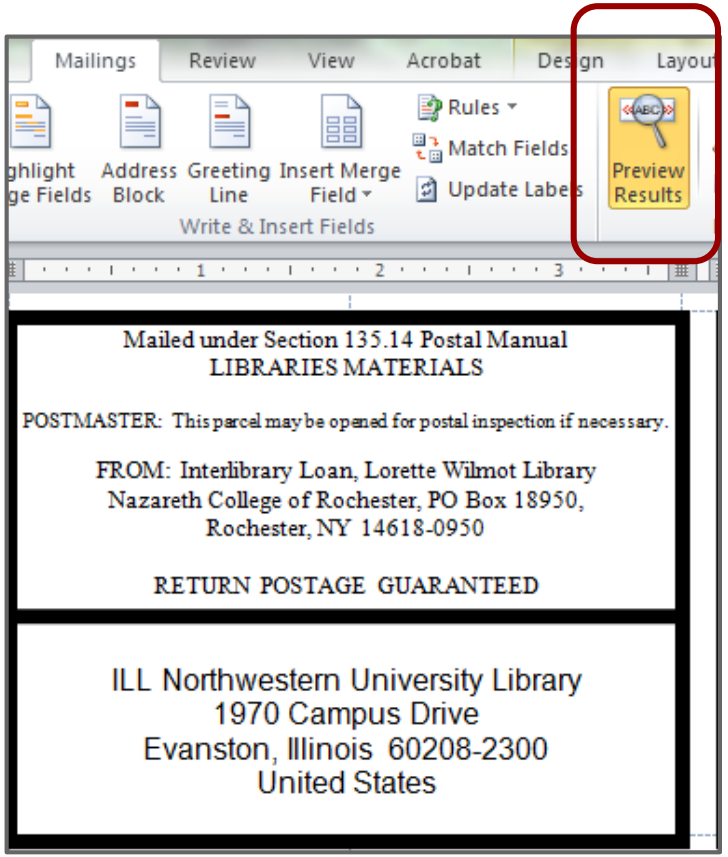
«Next Record»
ILL
{ IF { MERGEFIELD
LenderAddresses_DefaultShippingMethodLoa } = "ELD
Delivery" "{ MERGEFIELD LA_Address1 }" "{ MERGEFIELD
LenderAddresses_Address1 }" }

1) Replace 1 with 2 for next Address lines
2) Replace 1 with 3 for next Address lines
3) Replace 1 with 4 for next Address lines

«Next Record»
ILL
{ IF { MERGEFIELD
LenderAddresses_DefaultShippingMethodLoa } = "ELD
Delivery" "{ MERGEFIELD LA_Address1 }" "{ MERGEFIELD
LenderAddresses_Address1 }" }
{ IF { MERGEFIELD
LenderAddresses_DefaultShippingMethodLoa } = "ELD
Delivery" "{ MERGEFIELD LA_Address2 }" "{ MERGEFIELD
LenderAddresses_Address2 }" }
{ IF { MERGEFIELD
LenderAddresses_DefaultShippingMethodLoa } = "ELD
Delivery" "{ MERGEFIELD LA_Address1 }" "{ MERGEFIELD
LenderAddresses_Address1 }" }
{ IF { MERGEFIELD
LenderAddresses_DefaultShippingMethodLoa } = "ELD
Delivery" "{ MERGEFIELD LA_Address1 }" "{ MERGEFIELD
LenderAddresses_Address1 }" }

Preview results by clicking on **Preview Results**





Toggle Codes

If it worked:

1) SAVE
2) Copy/Paste edited address into the other address labels
3) Preview Results
4) Save
5) Working on a Copy? Remember to rename your file

Other categories for the DefaultShipping dropdown:

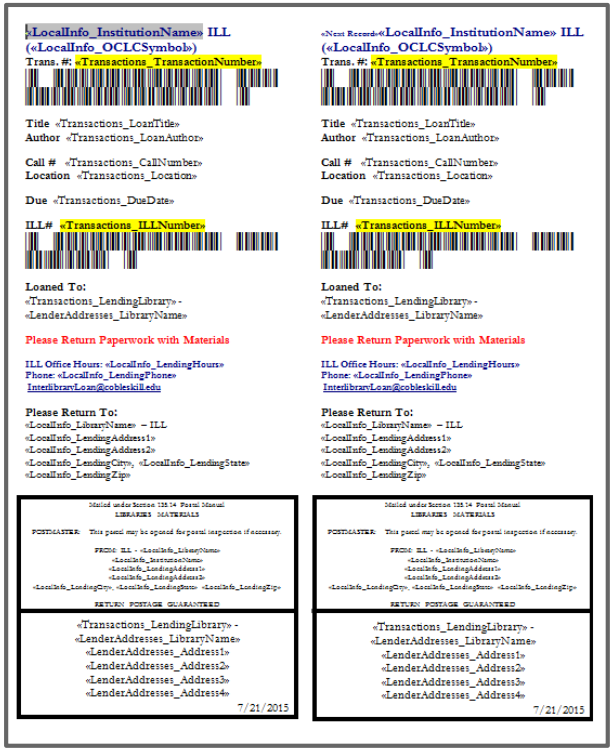
US FOREIGN AIR MAIL to:
Document Supply
Brotherton Library
University of Leeds, Woodhouse Lane
Leeds LS2 9JT
United Kingdom

ELD DELIVERY to:
NYS COLLEGE OF CERAMICS AT ALFRED
UNIVER
2 PINE ST
ALFRED, NY 14802-1297
HUB: ROC

UPS to:
Interlibrary Loan
University of Idaho Library
875 Perimeter Drive MS 2357
Moscow, Idaho 83844-2357

BONUS
ROUND

Lending Pull Slip that doubles as a Mailing Label


«LocalInfo_InstitutionName» ILL («LocalInfo_OCLCSymbol»)
Trans. #: «Transactions_TransactionNumber»

Title «Transactions_LoanTitle»
Author «Transactions_LoanAuthor»

Call # «Transactions_CallNumber»
Location «Transactions_Location»

Due «Transactions_DueDate»

ILL# «Transactions_ILLNumber»

Loaned To:
«Transactions_LendingLibrary» -
«LenderAddresses_LibraryName»

Please Return Paperwork with Materials

ILL Office Hours: «LocalInfo_LendingHours»
Phone: «LocalInfo_LendingPhone»
InterlibraryLoan@cobleskill.edu

Please Return To:
«LocalInfo_LibraryName» – ILL
«LocalInfo_LendingAddress1»
«LocalInfo_LendingAddress2»
«LocalInfo_LendingCity», «LocalInfo_LendingState»
«LocalInfo_LendingZip»

Mailed under Section 135.14 Postal Manual
LIBRARIES MATERIALS

POSTMASTER: This parcel may be opened for postal inspection if necessary.

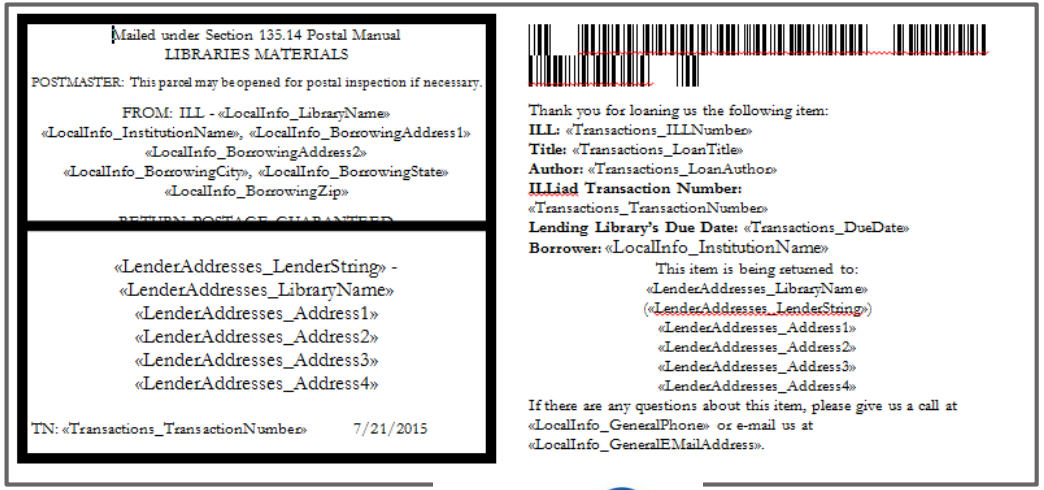
FROM: ILL - «LocalInfo_LibraryName»
«LocalInfo_InstitutionName», «LocalInfo_BorrowingAddress1»
«LocalInfo_BorrowingAddress2»
«LocalInfo_BorrowingCity», «LocalInfo_BorrowingState»
«LocalInfo_BorrowingZip»

RETURN POSTAGE GUARANTEED

«LenderAddresses_LenderString» -
«LenderAddresses_LibraryName»
«LenderAddresses_Address1»
«LenderAddresses_Address2»
«LenderAddresses_Address3»
«LenderAddresses_Address4»

TN: «Transactions_TransactionNumber» 7/21/2015

A Borrowing Return label and a Thank You Return Slip Combo


Mailed under Section 135.14 Postal Manual
LIBRARIES MATERIALS

POSTMASTER: This parcel may be opened for postal inspection if necessary.

FROM: ILL - «LocalInfo_LibraryName»
«LocalInfo_InstitutionName», «LocalInfo_BorrowingAddress1»
«LocalInfo_BorrowingAddress2»
«LocalInfo_BorrowingCity», «LocalInfo_BorrowingState»
«LocalInfo_BorrowingZip»

RETURN POSTAGE GUARANTEED

«LenderAddresses_LenderString» -
«LenderAddresses_LibraryName»
«LenderAddresses_Address1»
«LenderAddresses_Address2»
«LenderAddresses_Address3»
«LenderAddresses_Address4»

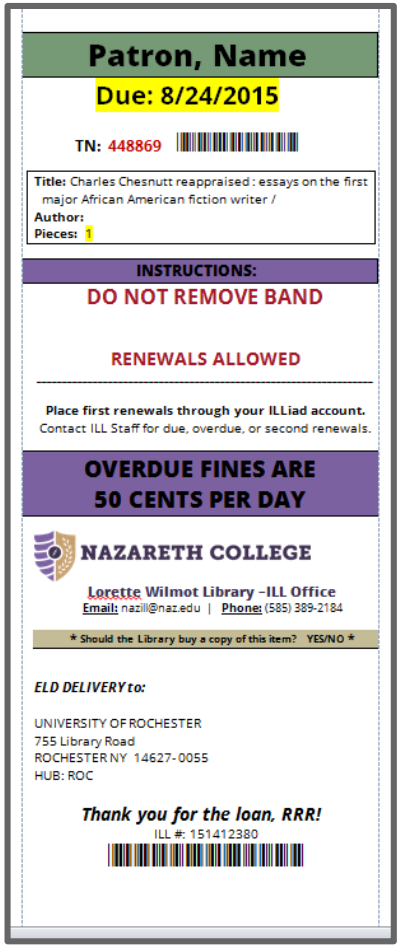
TN: «Transactions_TransactionNumber» 7/21/2015

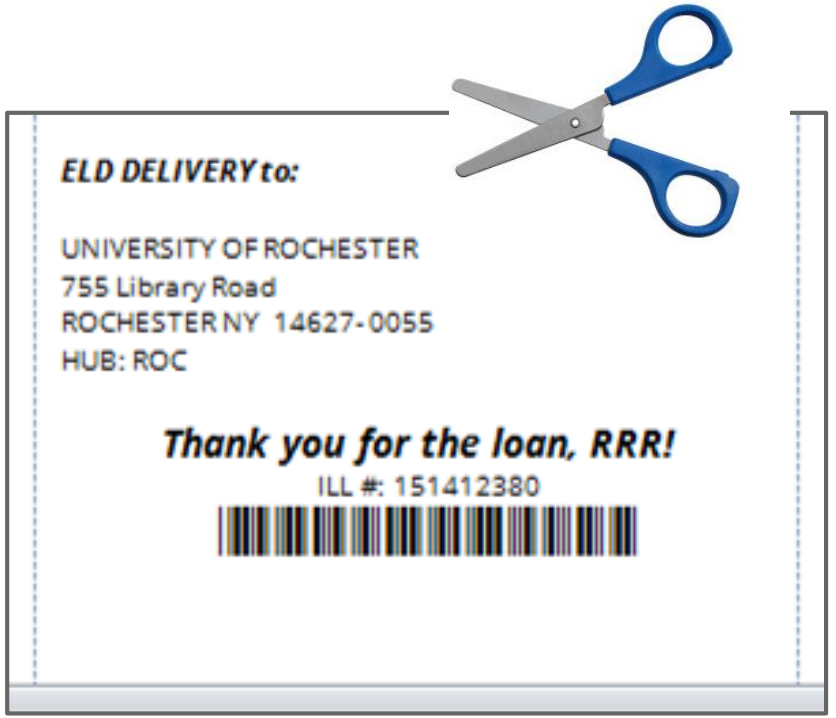
Thank you for loaning us the following item:
ILL: «Transactions_ILLNumber»
Title: «Transactions_LoanTitle»
Author: «Transactions_LoanAuthor»
ILLiad Transaction Number:
«Transactions_TransactionNumber»
Lending Library's Due Date: «Transactions_DueDate»
Borrower: «LocalInfo_InstitutionName»

This item is being returned to:
«LenderAddresses_LibraryName»
(«LenderAddresses_LenderString»)
«LenderAddresses_Address1»
«LenderAddresses_Address2»
«LenderAddresses_Address3»
«LenderAddresses_Address4»

If there are any questions about this item, please give us a call at «LocalInfo_GeneralPhone» or e-mail us at «LocalInfo_GeneralEMailAddress».

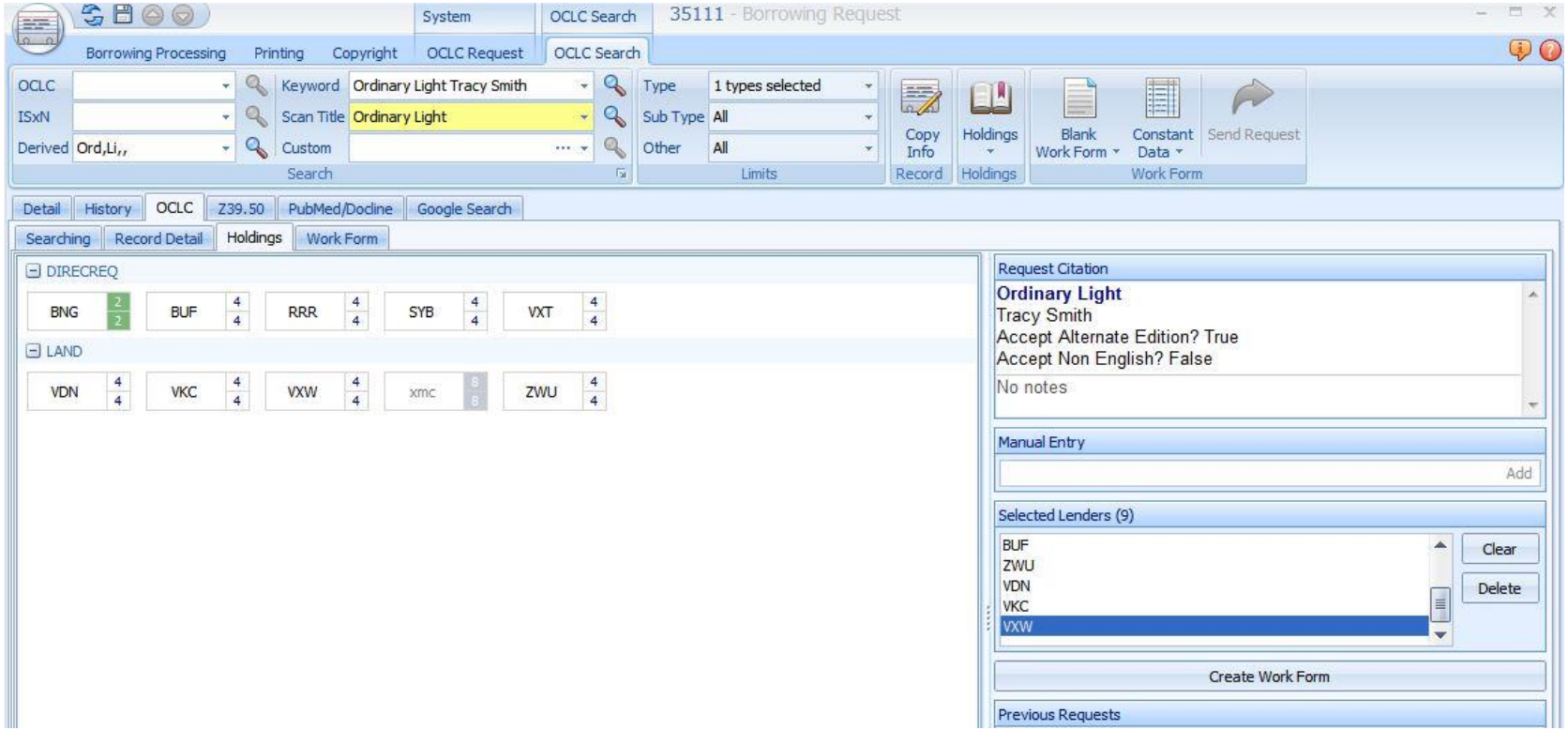
Borrowing Book Band that doubles as a “return slip” and “thank you”





Other ILLiad 8.6 Surprises!

Article and Book Days to Respond



Display Status

Edit Row

ID	
NVTGC	ILL
ProcessType	Borrowing
TransactionStatus	Request Sent
WebDisplayStatus	Request submitted to Lending Libraries

To check the detailed status of a request, click on the transaction number.

In Process

Transaction	Type	Title	Author	Status
35191	Book	Uncivil seasons	Malone, Michael	Request submitted to Lending Libraries

Wrap up: Ideas for workshops?

What types of online one-hour or two-hour workshops would you like to see?

What do you need help with?

Food Party!

EVERYTHING! (And a Pizza Party) tonight out at the Gazebo (6:00pm - 8:00pm)

Thank you to conference supporters!