A **unified community**
of trust and support
built around a critical and
clearly understood purpose:
effective resource sharing.

information delivery services

IDS

IDS PROJECT

Workflow Toolkit

2013

Made possible by our Strategic Partners

ATLAS SYSTEMS, INC.

NY3Rs
New York 3Rs Association

CUNY
The City University of New York

SUNY CONNECT
Libraries Wherever You Are

Copyright Clearance Center

SerialsSolutions
A ProQuest® Company

OCLC

Workflow Toolkit

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Quick Reference

My ILLiad (OCLC Hosted)

My ILLiad URL: http://

_____ .illiad.oclc.org

My campus IP ranges: _____ . _____ . _____ . _____ **to** _____ . _____ . _____ . _____

SQL server name: _____ **Database**: _____

My ILLiad (Locally Hosted)

If your installation is NOT OCLC hosted, write in your support person:

Name:

_____

Email:

_____

Phone:

_____

My ILS (Catalog)

ILS vendor & product name:

_____

Server address: _____**Port**: _____

Z39.50 username:

_____

Z39.50 password:

_____

Need Help?

ILLiad documentation: http://prometheus.atlas-sys.com
Atlas Systems Training: http://www.atlas-sys.com/staff-training/
OCLC licensees: 1-800-848-5800 or support@oclc.org
Original Atlas licensees: 1-800-567-7401 x1 or service@atlas-sys.com
Workflow Toolkit listserv: http://mail.geneseo.edu/mailman/listinfo/workflowtoolkit-l
ILL-L listserv: http://listserv.oclc.org/archives/ill-l.html

Collaborative Technologies

There are many ways to stay in touch with your fellow IDS Project members between Users Group meetings. If you can't make it out for lunch or a visit, try one of these easy (and free!) collaborative technologies to stay in touch.

Google+ Hangouts

- Required: Google+ account for everyone, Google Voice and Video Plugin, Windows XP+, Mac OS X 10.5+, or Linux
- Allows voice, video and screen sharing

Skype

- Required: Skype account. Skype program (requires admin. privileges)
- Screen sharing allowed 1-on-1 for free

join.me

- Screen-sharing only
- FREE. Easy to install (no administrative privileges required).
- When you run the program you'll be given a 9 digit code (e.g. 783-273-162)
- To share your screen, give the code to the other person and have them enter it at http://join.me

ooVoo

- Group video calls with up to 12 people
- Record and send video messages
- Record and upload calls to YouTube
- Send instant messages to your contacts on ooVoo
- Set up a web chat room for free

Jing

- Take Screenshots: Capture an image of what you see on your computer screen
- Record Screencasts: Record up to 5 minutes of onscreen video
- Collaborate: Jing's older siblings – Snagit and Camtasia - are great for editing and enhanced sharing

Notes from your library visit

Directions: Photocopy this worksheet every time you visit a library and another library visits yours. Take a few minutes at the conclusion of each visit to reflect upon what your learned.

When I visited _____

3 things I learned were:

_____

_____

_____

2 discussion ideas for the next user group meeting are:

_____

_____

1 thing that I will definitely take back to my library is:

_____

When _____ visited me:

3 things I learned were:

_____

_____

_____

2 discussion ideas for the next user group meeting are:

_____

_____

1 thing that I will definitely take back to my library is:

_____

IDS PROJECT

Workflow Toolkit

Borrowing

- Alias & Unmediated Article Processing
- Buy vs Borrow
- Copyright
- Custom Holdings
- Direct Request
- Email Notifications
- Lender Address Maintenance
- Odyssey Trusted Sender
- Patron Authentication
- Web Circulation

A unified community of trust and support built around a critical and clearly understood purpose: effective resource sharing.

information delivery services

IDS

ALIAS & Unmediated Article Processing

What is it?

IDS Project members have access to the Article License Information and Availability Service (ALIAS) as part of their membership. This system works within ILLiad and is similar to Direct Request, except member libraries do not need to supply licensing information to a knowledge base. Instead, it utilizes a database of generic licenses along with link resolver holdings to develop load balanced lender strings.

How does it help?

By unmediating a large portion of your article requests, you are expediting their submission to OCLC (it's like offering 24/7 service). This improves request turnaround time for your patrons, while also enabling your staff to focus on requests that require more time -- namely, those pesky hand-entered requests and hard-to-find materials. When delivered electronically, it's not unheard of to get same-day (or same-hour!) delivery for many articles submitted automatically.

Getting Started

Installing ALIAS

OCLC/Atlas Hosted Sites
Atlas does the installation of the IDS Service module of ALIAS for OCLC hosted servers. You do not need to be out of the ILLiad client during this process.

Self-Hosted Sites
For self-hosted servers, download the ALIAS installer:
- http://goo.gl/eJMxN

This will need to be installed on the ILLiad server. ALIAS will run without restarting the ILLiad Client though you may need to restart the IDS Service from the Windows Services on the ILLiad server. Make sure Port 2100 on your server is open to IP 216.54.119.244 (you will have to check with your IT department to make sure this port is open).

Implementing ALIAS

Create three borrowing Custom Queues in the Customization Manager:
- Awaiting IDS Sending
- Awaiting IDS Local Processing
- Awaiting IDS Local Sending

In the Customization Manager, go to System, click on IDS, and select the **IDSServiceActive** key. Change the key value to Active and click the Save button.

Next, with the System menu still open, click on Routing and select the Routing table. You will need to create the following routing rules and ensure that they are placed in order after your Direct Request routing rule.

RuleNo	2
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Copyright Clearance
MatchString	`t.RequestType = 'Article' and len(t.PhotoJournalYear) = 4 and t.PhotoJournalYear <convert(varchar(4),(datepart(year,getdate()) – 5))`
NewProcessType	Borrowing
NewTransactionStatus	Awaiting IDS Sending
RuleDescription	Bypass Copyright Clearance for IDS Sending if article is over 5 years old, must update year each January 1

RuleNo	3
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	`t.ISSN <> NULL and t.RequestType = 'Article' and (t.LendingString = '' or t.LendingString is NULL)`
NewProcessType	Borrowing
NewTransactionStatus	Awaiting IDS Sending
RuleDescription	Route requests to IDS Sending after clearing copyright

Once the setup is complete, ALIAS processes articles in the Awaiting IDS Sending queue. There is no need to open this queue when it appears. After about a minute, requests in this queue should either be automatically updated to Request Sent if successful, Awaiting Local Processing if locally held, or Awaiting Request Processing if unsuccessful. If unsuccessful, IDS Service will leave a note in the request explaining why. Common reasons include: no ISSN provided; invalid ISSN provided (often for book chapters); or no holdings were found.

Please note: when no holdings are found, this means that there were no available electronic holdings. Bear in mind this includes embargo periods and licensing restrictions. When available, ALIAS will check print holdings. But if a library's print holdings are not loaded correctly, this could result in a discrepancy with holdings found in WorldCat.

Using ALIAS with OCLC's Direct Request for Articles

The following routing rules allow you to send requests through ALIAS and then through OCLC's Direct Request for Articles if an IDS Project supplier cannot be found. Simply add the following routing rule after RuleNo 3 listed above.

RuleNo	3
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	`t.RequestType = 'Article' AND t.LendingString = 'IDS'`
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
RuleDescription	Route requests to Direct Request for Articles if ALIAS can't process automatically

Using ALIAS with RapidILL

The following routing rules are for libraries that use both ALIAS and RapidILL. These rules will first send article requests through Rapid, then through ALIAS if they cannot be filled through Rapid.

RuleNo	1 (just make sure it's the first article routing rule)
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Copyright Clearance
MatchString	`t.RequestType = 'Article' and len(t.PhotoJournalYear) = 4 and t.PhotoJournalYear <convert(varchar(4),(datepart(year,getdate()) - 5))`
NewProcessType	Borrowing
NewTransactionStatus	Awaiting RAPID Request Sending
RuleDescription	Send requests outside Rule of 5 straight to RAPID.

RuleNo	2
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	`t.RequestType = 'Article' AND t.ISSN <> NULL AND (t.LendingString = NULL OR t.LendingString = '')`
NewProcessType	Borrowing
NewTransactionStatus	Awaiting RAPID Request Sending
RuleDescription	Send requests cleared from copyright to RAPID.

RuleNo	3
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	`t.RequestType = 'Article' AND t.LendingString = 'RAPID' AND t.TransactionNumber not in (select transactionnumber from tracking where changedby='IDS Service')`
NewProcessType	Borrowing
NewTransactionStatus	Awaiting IDS Sending
RuleDescription	Sends requests not filled by RAPID to ALIAS.

Troubleshooting

If ALIAS does not run, check IDS Service and restart if necessary (like Odyssey Manager, etc.). If you are a hosted site, please contact Mark Sullivan (email: sullivm@geneseo.edu, phone: 585-245-5172) to have your service restarted.

You should also check your routing rules. Ensure that the RuleActive values are set to Yes. Also make sure that there are no missing quotation marks or parentheses in the MatchString values. Double check the spelling of the TransactionStatus and NewTransactionStatus values. If you still have problems, return to this page and copy and paste the values listed into your Customization Manager.

Also check and see if you have any firewall conflicts with Port 2100.

Using ALIAS

This brief guide will show you how ALIAS works within the ILLiad client.

The Basics

The ALIAS process is actually really simple. When a user submits an article request that has both a date and an ISSN, ALIAS will try to process the request automatically (much like Direct Request does with loans). There are three possible results:

- ALIAS submits an OCLC request: If ALIAS determines that you do not have access to the article, but other IDS Project libraries do and are licensed to share it, then it will generate a lending string and send the request to OCLC. The request will be updated to Request Sent in ILLiad.
- Request is locally held at your library: If ALIAS finds that you have access to the article, then the request will be routed to the Awaiting IDS Local Processing queue. This is based upon your electronic holdings, but only takes into account your print holdings if you have properly uploaded them to your Serials Solutions or SFX.
- Request cannot be automatically processed: If ALIAS cannot automatically process a request, it will be routed to the Awaiting Request Processing queue with an explanation in the notes field. Common causes include:
  - No ISSN
  - No date
  - Invalid ISSN (usually caused by book chapter requests with ISBNs)
  - No holdings found (just within ALIAS, not OCLC)

The Queues

ALIAS utilizes two unique queues that you might notice.

- Awaiting IDS Sending: This queue temporarily holds requests that are waiting to be automatically processed by ALIAS. If you see this, it will likely disappear within a few seconds (just refresh the module). However,if you notice that requests are piling up in this queue, have your system administrator restart the IDS Service on your ILLiad server (if you're hosted, contact Mark Sullivan at 585-245-5172, or email sullivm@geneseo.edu).
- Awaiting IDS Local Processing: This queue holds requests that ALIAS determined you have access to. If it turns out that, for whatever reason, you do not actually have an article, then simply remove the ISSN and route the request to Awaiting Request Processing. Otherwise, you can cancel this request or deliver it to your patron depending upon your local practices.

Unfilled ALIAS Requests

If a request comes back unfilled after being automatically processed by ALIAS, then simply process it like you normally would through OCLC. Because ALIAS only searches a library's print holdings if they've been uploaded to their Serials Solutions or SFX, it is not uncommon to find IDS Project libraries that have print holdings available in OCLC. This does not mean that ALIAS did not work properly; rather, it just means certain libraries did not make their print holdings available to ALIAS.

Copyright Clearance

Requests that fall within the Rule of 5 will still be placed in Awaiting Copyright Clearance. Once you process copyright on a request, then it will be moved to ALIAS and automatically processed. All other requests will be automatically routed to Awaiting IDS Sending after the user submits his or her request.

Buy vs. Borrow

What is it?

ILL is not free, even in the absence of lender fees. Costs like shipping, staff time, license/ subscription fees, copyright, and office supplies sure can add up. When all of those costs combine, you can sometimes be faced with a $15-$25 transaction (or more)—perhaps only for a $5-$10 item. That's why it can make a whole lot of sense to buy the item instead: articles from publishers or document providers, and books/media from Amazon or other sellers.

Although it helps if your ILL department has a credit card, it's not required. For example, articles can be purchased via the Copyright Clearance Center's Get It Now service with monthly invoices (at a negotiated flat fee of $24/article). Books and media can be purchased from your preferred vendors, which may allow you to use purchase orders. The key is a sensible workflow: Have you considered integrating your Acquisitions and ILL requests into ILLiad using the Getting It System Toolkit (GIST)? Can the cataloging process be expedited for these on-demand titles? Do you have the discovery addons you need to quickly make informed decisions?

How does it help?

Not only can purchasing a book or article save you money, it almost guarantees better turnaround time for your patrons, and in the case of books/media, can also improve your collection diversity. For articles, you can often pay less to purchase a copy than to pay copyright royalties. For books and media, purchasing can make the most sense if the combination of lender fees and return shipping cost more than a new or used copy of the item itself (in many cases you can even get free shipping, such as with Amazon Prime).

Getting Started

Getting It System Toolkit (GIST)

GIST is a suite of tools that facilitates purchase request management within ILLiad. It's extremely customizable and is tailored for a purchase-on-demand workflow. Using data gathered from WorldCat, Amazon, Better World Books, Google Books, Hathi Trust, and other open access book repositories, staff can easily determine if it makes more sense to buy a book, borrow a book, or connect users with a full text copy if it's available. This saves time, money, and can improve your collection at the same time.

You have full control over implementation: use it only for purchasing select ILL requests; implement a full-scale purchase-on-demand service; or use it to manage your entire acquisitions operation. For more information, visit http://www.gistlibrary.org.

Copyright Clearance Center's Get It Now service

The Get It Now service allows libraries to quickly, easily, and more cost-effectively provide pay-per-view articles to their patrons. With access to over 8,800 journal titles from leading publishers, Get It Now provides a gateway for purchasing journal articles on demand at a price

lower than purchasing directly from the publishers websites. In addition, Get It Now facilitates direct-to-patron delivery using Odyssey -- often with turnaround times under an hour. Billing is consolidated which is ideal for ILL departments without credit cards.

To get started, first contact the Copyright Clearance Center to set up your account: http://www.copyright.com/content/cc3/en/toolbar/productsAndSolutions/getitnow.html.

Then, visit the ILLiad Addons Directory to download the Get It Now addon: https://prometheus.atlas-sys.com/display/ILLiadAddons/CCC+GetItNow+Service

For help setting up and using the addon, see: http://www.gistlibrary.org/illiad/addons/ccc-get-it-now/.

Using vendor addons

If you library has a vendor of choice, you can take advantage of individual vendor addons to make quick purchases. These are handy especially if you only make occasional purchases through your ILL office. Addons have been developed for most major vendors, including Amazon, Alibris, Barnes & Noble, GOBI, Better World Books, and Powell's. For more information, visit the ILLiad Addons Directory: https://prometheus.atlas-sys.com/display/ILLiadAddons/Addons+Directory.

Tip: Assign a Vendor for your purchase requests

Making a purchase in ILL? We recommend using a custom Lender Address record simply called "Vendor." Not only will this allow you to easily track and search for your purchases in ILLiad, but marking it as a "Copyright Payer" also prevents purchased articles from accidentally appearing in your copyright orders.

To avoid any connection manager errors, be sure to switch the system ID from OCLC to OTH.

Copyright

What is it?

Copyright and clearing copyright is an everyday part of the ILL process for article requesting. Knowing, understanding, and complying with the CONTU guidelines is an integral part of ILL.

The most important guideline for borrowing is the "Rule of Five," which states that a library may not request more than 5 articles, published fewer than five years from the date of the request, from a particular journal in a given year. It is standard practice to retain records for three years once copyright permission is granted.

How does it help?

While many libraries report ILL transactions for copyright clearance at the end of the calendar year, more frequent tracking and reporting may have added benefits. Copyright costs may increase throughout a year and direct purchasing from publishers, once copyright limits have been reached, can save a library anywhere from $5 to $25.00 and more per transaction.

Also, putting into place a simple Copyright Clearance for older articles bypass routing rule will streamline your borrowing for older articles and shorten turnaround times.

Info about U.S. Copyright Law pertaining to ILL

U.S. Copyright Office Circular 21: Reproduction of Copyrighted Works by Educators and Librarians
http://www.copyright.gov/circs/circ21.pdf

CONTU Guidelines on Photocopying under Interlibrary Loan Arrangements
http://www.cni.org/docs/infopols/CONTU.html

Services available for obtaining permissions

Copyright Clearance Center
http://www.copyright.com/

Get It Now pay-per-view service from the Copyright Clearance Center
http://www.copyright.com/content/cc3/en/toolbar/productsAndSolutions/getitnow.html

Getting Started

Configuring ILLiad for optimal copyright management

By default, ILLiad sends all incoming article requests to Awaiting Copyright Clearance whether they fall within the CONTU Rule of 5 or not. Using a simple routing rule, however, you can send requests for articles published over 5 years ago (thus exempt from the Rule of 5) straight to Awaiting Request Processing (or to your unmediated services). This eliminates having to manually clear these requests during Copyright Processing.

Note in the example below that you can change the NewTransactionStatus to one of your automated services, such as:
- **IDS Project's ALIAS**: Awaiting IDS Sending
- **RapidILL**: Awaiting RAPID Request Sending
- **OCLC Direct Request**: Awaiting Direct Request Sending

Rule No	*(this varies, but it should come before all other rules for articles)*
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Copyright Clearance
Match String	t.RequestType = 'Article' and len(t.PhotoJournalYear) = 4 and t.PhotoJournalYear < convert(varchar(4),(datepart(year,getdate()) - 5))
New Process Type	Borrowing
New Transaction Status	Awaiting Request Processing
Rule Description	Rule to bypass copyright clearance for articles exempt from the Rule of 5.

Basic Copyright Workflow

Once you hit the limit of five requests, and you wish to track, record and submit the copyright through ILLiad you will need to:
1. Click the **Search** button in the Awaiting Copyright Clearance screen to look up the Copyright prices.
2. If you are requesting this through traditional ILL means (from another library and not from a publisher), click the **Save CCC Information** button. The request then forwards to ALIAS, Rapid, Direct Request, or into the Awaiting Request Processing Queue and the CCC pricing info is included.

For more information about clearing copyright, consult the ILLiad Documentation: https://prometheus.atlas-sys.com/display/illiad83/Clearing+Copyright

> **Help!**
>
> Oops! Clicked that CCC button by accident and didn't mean to record the pricing info? Go into the record and click the Remove Payment button. That's it!

Using ILLiad to submit your copyright order to the CCC

If this is your first time...
1. Create an account at the Copyright Clearance Center: http://www.copyright.com/
2. Enter your CCC Username and Password into the Customization Manager:
    a. **Key**: Borrowing|Copyright|**CCCUsername**
    b. **Key**: Borrowing|Copyright|**CCCPassword**

Once a month (recommended)...
Pick a date when you will process and report your copyright (the first of the month?).
In ILLiad:
1. Click on the **System** ribbon
2. Click **Web Reports** and log in
3. From the **Administrative** menu, select **Copyright**
4. Supply the start and end dates, then click **Generate Report**

There are three categories in the report:
● Requests that are 'Finished' and need reporting,
● 'Outstanding' requests (yet to be filled by a library) that have saved payment info
● Copyright usage you've reported to the CCC this year

In ILLiad:
1. Click on the **Borrowing** ribbon
2. Under the **Process Copyright** menu, click the **Submit Copyright Orders** button
3. Enter a start date and an end date
4. Click the **Load Copyright** button

5. Click on **Refresh Fees** (as these may have changed since you saved your payment information).
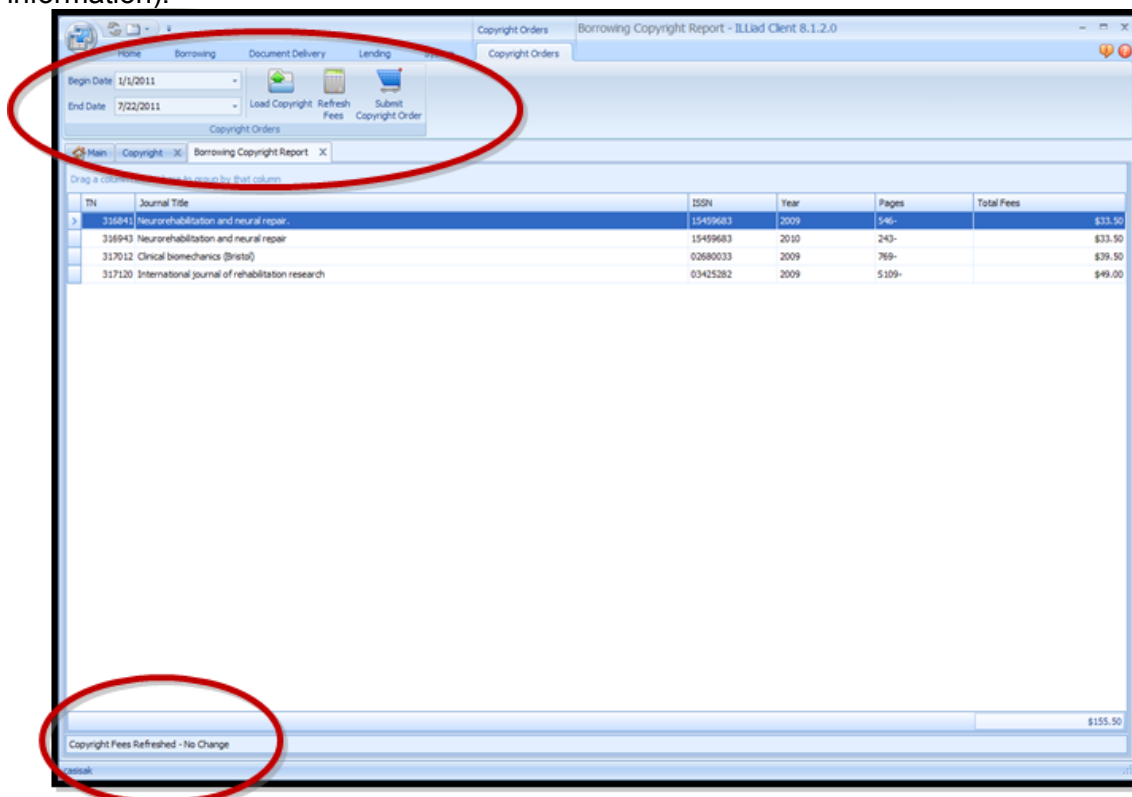
6. Click the **Submit Copyright Order** button
7. In the pop-up box, confirm you want to report these to the CCC,
    a. Click **Yes** if correct
    b. Otherwise, click **No** (then make necessary corrections before continuing).
8. When they are submitted the note "Copyright Orders Submitted" pops up in the status bar.

Tip:

Oops! Made a mistake with your order after you hit the submit button in ILLiad? Never fear! Log into your Copyright Clearance Center account on the CCC website and edit the order before they invoice you. Make sure to reflect any changes you make in the ILLiad request.
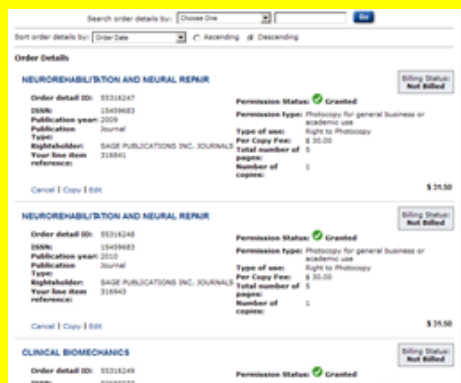
Things to consider

1. How do you report Copyright?
    a. Yearly
    b. Monthly
    c. Quarterly
    d. No budget for Copyright, no more requests are put through once limit of five is reached
2. If you report Copyright, have you:
    a. Checked into reporting it monthly/quarterly through ILLiad? If not, why?

    _____
    _____
    b. Checked into pricing comparison workflow to see if those "over 5s" are more cost-effective to purchase directly from the publisher or from a Get It Now model?

    _____
    _____
3. Still confused about Copyright and Copyright reporting through ILLiad and the CCC? Contact your IDS Mentor or a local IDS library in your area for more info.

Custom Holdings

What is it?

Do you have sticky notes of favorite lenders on your computer screen? Do you ever ask yourself, "When I go on vacation, will so-and-so know the right lenders to use?" Take the guesswork out of ILL Borrowing by using Custom Holdings.

This tool is critical for speeding up processing, streamlining and customizing the borrowing workflow. It automatically organizes possible lenders, and even the selection of lenders based on the criteria you choose. Custom holdings do this by looking at the groups of OCLC symbols you created and arranging them in hierarchical paths. Many libraries arrange groups of lenders by delivery method, cost, due dates, turnaround times, or region. Build a strategy according to your priorities.

How does it help?

Custom holdings provide a significant time and cost savings. It automates the selection of lenders and customizes selections based on your criteria. It can almost eliminate the need to check policies directory while processing requests.

Getting Started

General Strategies

The more lending libraries you can add to your custom holdings groups the more effective the operation, whether your priorities focus on reducing cost, faster turnaround times, preferred delivery (Odyssey, Ariel, FedEx/UPS lenders, etc.), libraries that charge by IFM or Invoice, or libraries that offer extended due dates for loans.

Paths are customized sets of custom holdings lending groups that prioritize lenders according to your strategies, for example; free and regional/reciprocal library partners first, fast or inexpensive second, bound volume lenders, etc.

A recip group is specific holdings group for each library to include libraries that sign a mutual agreement to not charge each other. This reduces billing processing, saves staff time, and reduces overall cost of ILL operations.

LVIS libraries agree not to charge each other, and as such, very effectively lower the cost of ILL and reduce staff time involved with billing (for more details, see the [LVIS website](#)).

Because custom holdings takes time to customize and lender policies change periodically, a best practice is to update the groups every other year.

Enter My Symbol Twice (EMST) is a list of OCLC symbols for lenders who require borrowers to enter their symbols twice on ILL work forms. Keeping this updated can lead to more accurate request processing and ensure that you give some libraries the necessary time to process your requests. In ILLiad, libraries that appear in the EMST list will automatically be added twice so you don't have to check yourself.

Step 1. Create custom holdings groups

The easiest way to create or update a custom holdings group is to access your FirstSearch Admin Module. From the **Staff ILL Settings** menu, select **Custom Holdings Groups**.
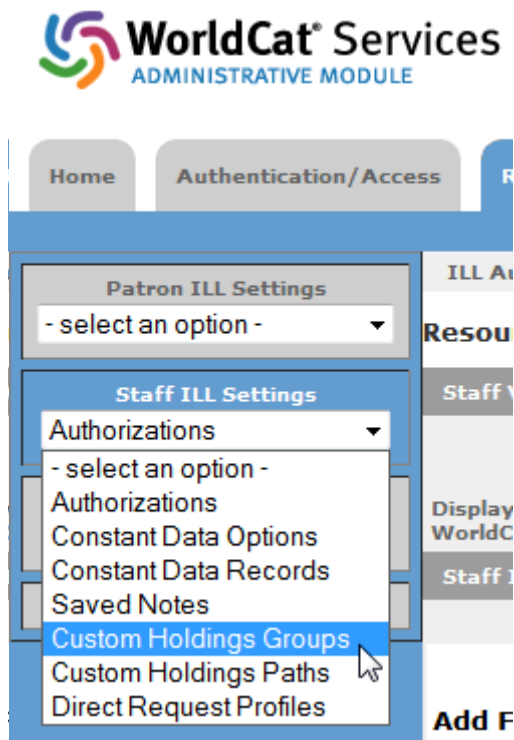
To create a new group, click on the **New Blank Record** button. Below in the **General Record Information**, enter a name and description for the group. Then, simply copy and paste the symbols from a Policies Directory search into the Symbols to be added or removed text area and click the **Add Symbols** button. When finished, click on the **Save Changes** button.

To update an existing group, select the group from the **Group Name** drop-down menu and click on the **Go** button. To update the groups using the sample groups on this page, click on the **View/Print** button. Copy and paste symbols from a Policies Directory search into the **Symbols to be added or removed** text area and click the **Remove Symbols** button. This will clear the list. Then, copy and paste the symbols into the text area and click the **Add Symbols** button. When finished, click on the **Save Changes** button.

The following table is an example of how you might organize your Custom Holdings.

	Loans	Copies
1	IDS Project (consortium)	IDS Project (consortium)
2	Regional reciprocal group (e.g. NY3R)	Reciprocal Odyssey libraries
3	State reciprocal group	Free Odyssey libraries (e.g. LVIS)
4	Regional LVIS libraries	Free Email/Article Exchange libraries
5	Libraries charging <= $5 IFM	Libraries charging <= $5 IFM
6	Libraries charging $5-$10 IFM	Libraries charging $5-$10 IFM

Some libraries break groups out extensively by cost, while others cluster them together in smaller Customs Holdings Groups (e.g. $5-$10IFM, $11IFM-$15IFM).

Tip: Tracking Lending Fees

To track changes in charging in a more detailed Custom Holdings arrangement, an Excel spreadsheet that details the library symbol, their charge for Books and for Copies may be helpful. When you receive your current month IFM charges, or receive an update to charges on the ILL Listserv, and you need to note the change in a charge, you'll know which group to delete from, and which group to place the symbol in.

Step 2. Create custom holdings paths

Once your groups are created, you need to arrange them in a path. In the ILLiad client, open the **System** ribbon and click on **Resource Sharing Settings**. The **Custom Holdings Path** tab should appear.

To create a new path, simply click the **New Path** button. Otherwise, select the path you wish to edit from the Name drop-down menu.

Next, drag and drop groups between the **Selected Groups** and **Available Groups** columns to add or remove groups from the path. To rearrange the order of the groups in the path, drag and drop them in the desired order. When finished, click the **Save** button in the ribbon.
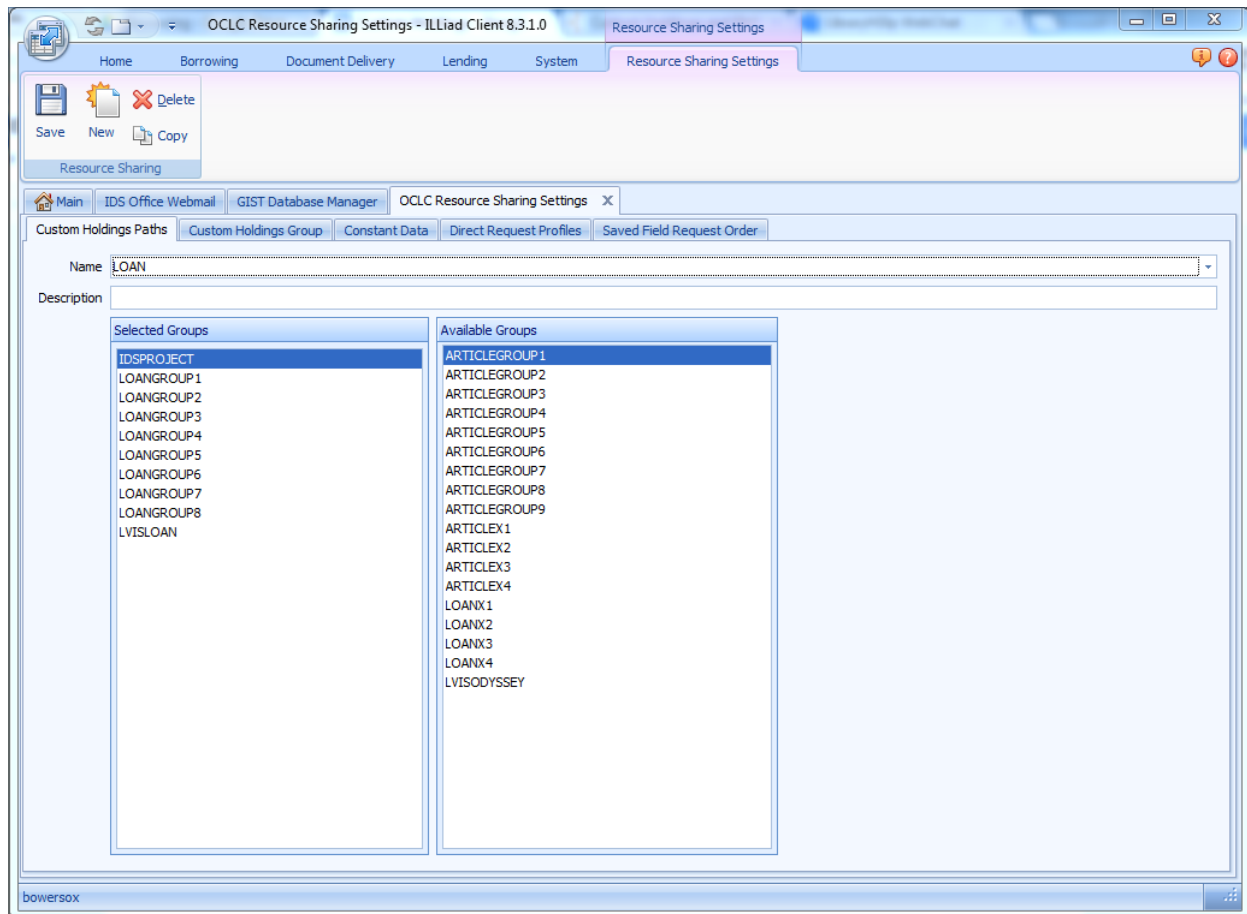
Step 3. Choose your default paths for loans and copies

In ILLiad, you can set a default Path for article and loan requests. This enables staff to simply press Ctrl+H to initiate a custom holdings view of possible lenders after selecting a matching title in OCLC.

Logon to the **Customization Manager** and select **System** and then **OCLC**. Next, click on **OCLCILLArticleHoldingsPath** and for the key value, enter the name of the custom holdings path you want to use for articles. Then click the Save button. Repeat this step for loans by setting the key value for **OCLCILLLoanHoldingPath**.
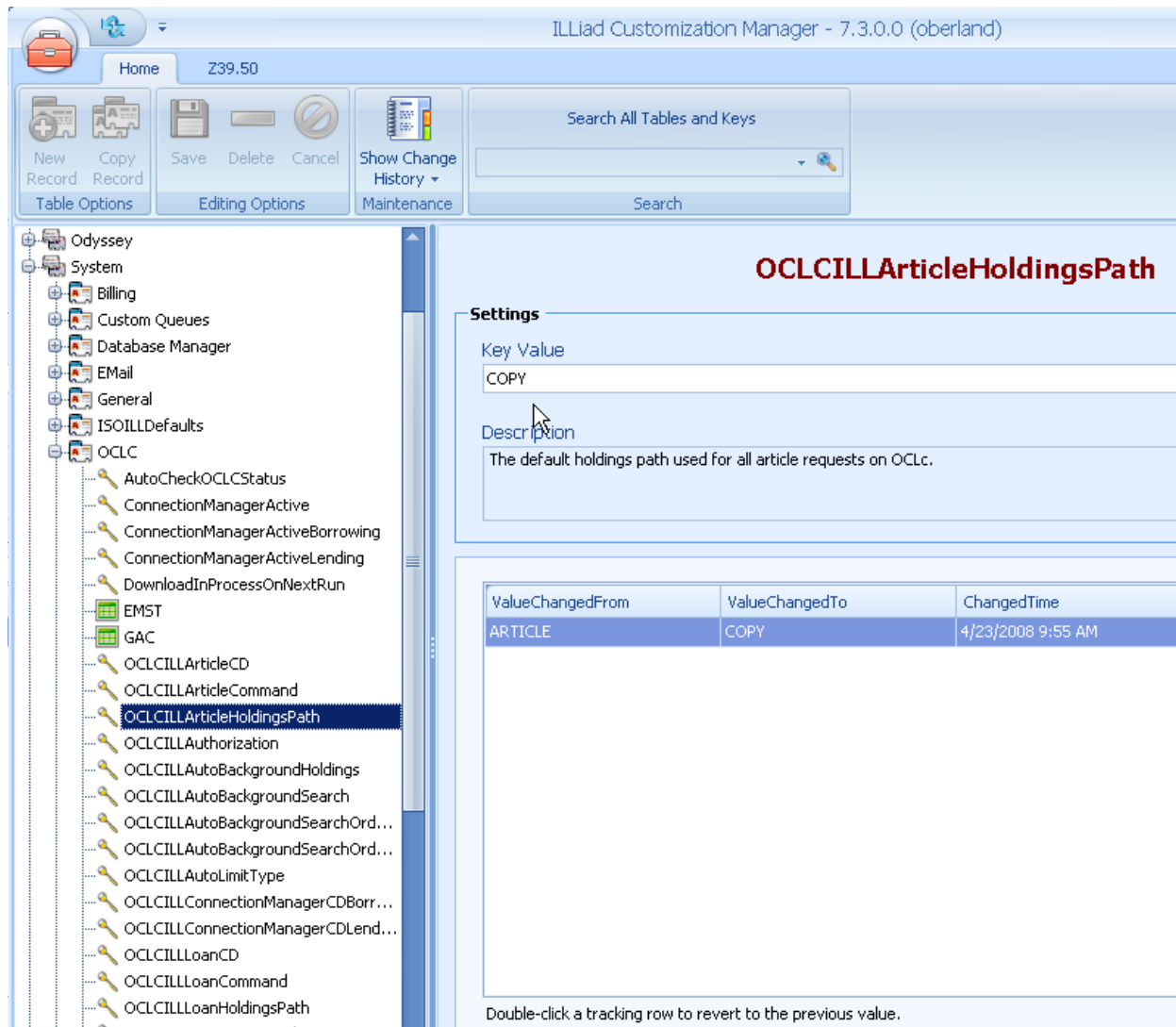
How to maintain your EMST table

You can find the current list of EMST lenders at ShareILL.

Logon to the ILLiad **Customization Manager**: select **System**, then **OCLC**, and finally **EMST**.

Add symbols by clicking the **New Record** button for additional EMST libraries. Or if a lender no longer requires EMST, select it in the list and click on the **Delete** button. In each case, be sure to click the **Save** button when you're finished.

Setting up or examining your custom holdings

1) What Custom Holdings Paths will you need? Books, Serials, Audio, Video?

_____

_____

2) What Custom Holdings Groups will you have? And what symbol(s) are in that Group?

Path Name (e.g. "Loans"):

	Group Name (e.g. "Free Loans")	OCLC Symbols
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Path Name (e.g. "Loans"):

	Group Name (e.g. "Free Loans")	OCLC Symbols
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Direct Request

What is it?

Do your patrons value quick turnaround time, but your queue is clogged with routine requests? Direct request can automate borrowing request processing within limits that you set in your OCLC direct request profile.

How does it help?

Even simple, routine borrowing requests take time to manually process. Enabling direct request in ILLiad and creating a direct request profile with OCLC allows you to automate routine processing so you can spend time doing other things.

Direct Request for Loans

In order to use Direct Request in ILLiad, you must create Direct Request Profiles and activate the Direct Request routing rule. Also, verify that you have OpenURL correctly configured.

Step 1. Create your Direct Request profiles

Logon to the ILLiad 8 Client, select the **System** tab, and click on **Resource Sharing Settings**.
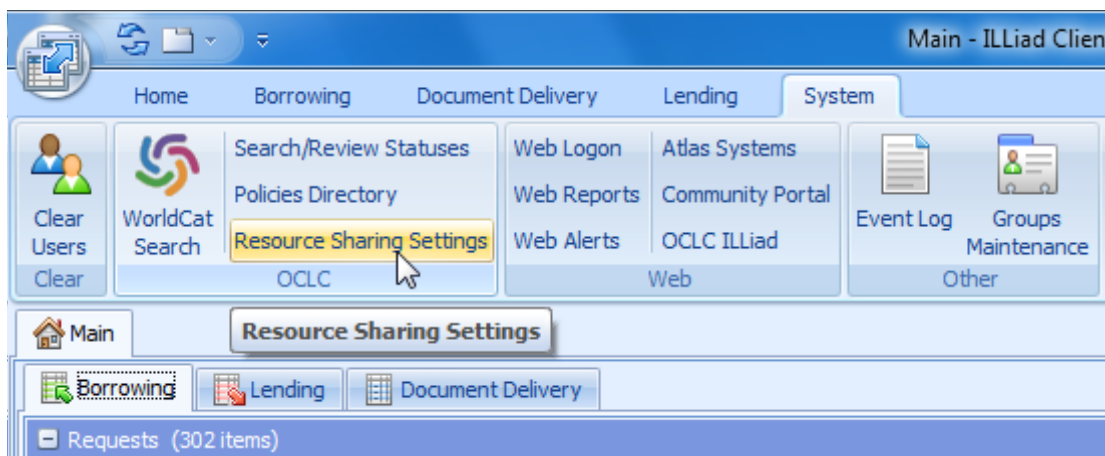
Click on the **Direct Request Profiles** tab. Next, click **New** in the **Resource Sharing Settings** ribbon; label the profile in the Name text box and provide a description.
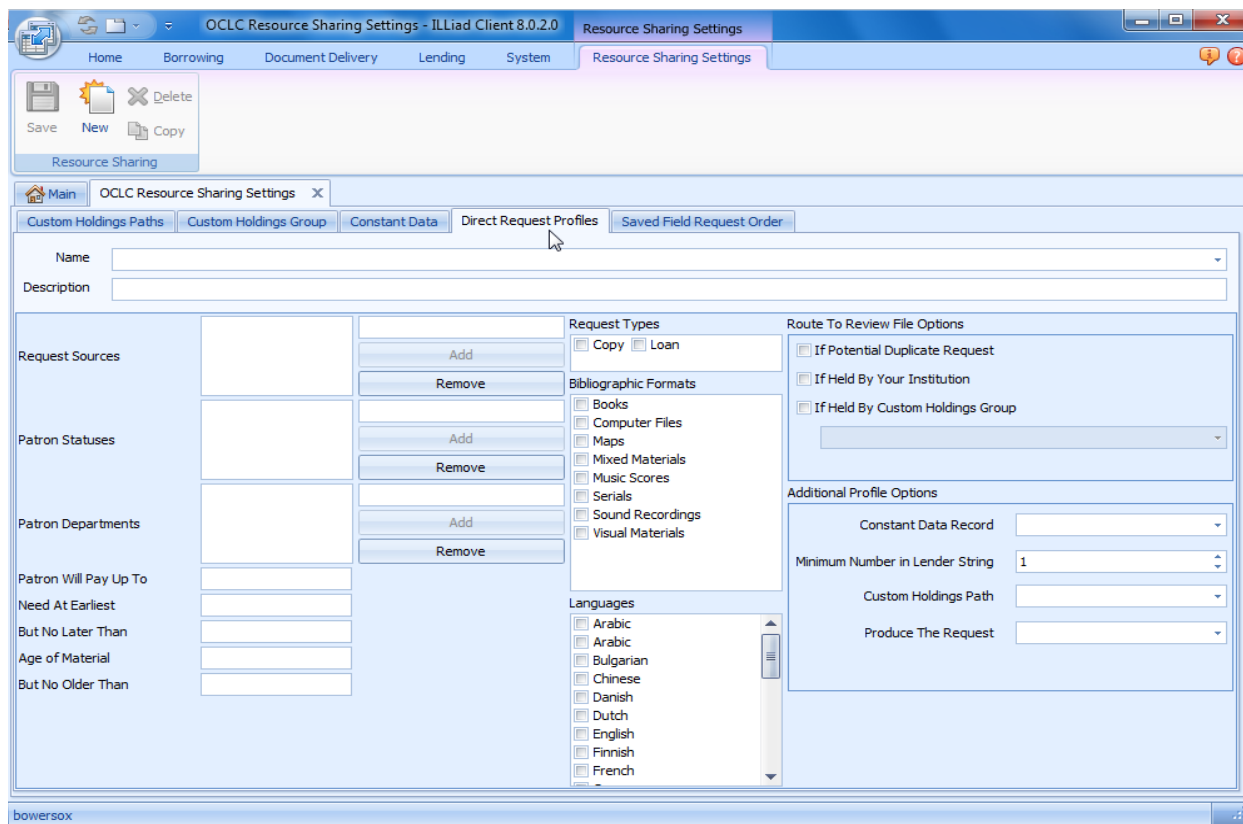
Then, choose the criteria for loans that can be Direct Requested. Be sure that the **Produce the Request** option is set to **Yes** (otherwise it will not be sent to OCLC automatically).

You can create as many or as few profiles as you need, and they can be broad or specific depending upon their purpose. Whenever a request is unable to be produced through Direct Request, it will appear in your Awaiting Request Processing queue with a system-generated note that explains why it could not be processed.

If you are a library that allows your users to request A/V materials, you can make your life a little easier by creating a Direct Request Profile for Visual Materials and Sound Recordings that automatically checks for holdings in a special A/V custom holdings path.

Tip: Direct Request Profiles

When creating a profile, consider the following:
- For whom will you allow direct request, which patron statuses?
- Will you allow direct request for fee-based items?
- What bibliographic formats will be processed by direct request? Books, DVDs, etc.
- How many minimum lenders must own the item?

Step 2. Activating the Direct Request routing rule and key

In order to truly remove staff mediation, you will need to activate the Direct Request routing rule. This will automatically move loan requests in Awaiting Request Processing that have either an ISSN or OCLC number into the Awaiting Direct Request Sending queue. Once there, the requests will be run through Direct Request.

Logon to the **Customization Manager**. Select **System**, then select **Routing**, and click on **Routing**.

In the table of routing rules, look for the rule with the description "**Default Direct Request Routing Rule.**" Double-click on the rule to open it and change the **RuleActive** option to **Yes**. Then click the Save button.

Next, search for the **DirectRequestEnabled** setting. Change the key value to **Yes** and save your changes.

Direct Request for Articles

OCLC has expanded Direct Request to facilitate article fulfillment. By tapping into the WorldCat Knowledge Base, the system can now accurately determine which libraries own an article and have the license to lend it. Getting started with Direct Request for articles requires the following steps:

1. Set up your instance of the WorldCat Knowledge Base: http://www.oclc.org/knowledgebase/default.htm
2. Activate the WorldCat Knowledge Base in the FirstSearch Admin Module (under **Resource Sharing Options**): http://firstsearch.oclc.org/admin
3. Create a Direct Request profile for article requests. For the option "**Prefers E Article Processing:**"
   a. **No** -- you do not prefer electronic articles (in other words, fulfillment by print is ok)
   b. **E within Group** -- for each group in your path, Direct Request will first select lenders that can supply from their e-journals before selecting print lenders.
   c. **E across Groups** -- Direct Request will first select e-journal lenders from each group in your path. Once all such lenders in your path are exhausted, it will then select print lenders from each group.
4. Create two Direct Request routing rules for articles:

Rule No	*(this varies, but it should come before all other rules for articles)*
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Copyright Clearance
Match String	t.RequestType = 'Article' and len(t.PhotoJournalYear) = 4 and t.PhotoJournalYear < convert(varchar(4),(datepart(year,getdate()) - 5))
New Process Type	Borrowing
New Transaction Status	Awaiting Direct Request Sending
Rule Description	Rule to bypass copyright clearance for articles exempt from the Rule of 5 and send them to Direct Request.

Rule No	*(this varies, but it should follow after the "Rule of 5" bypass rule)*
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Request Processing
Match String	t.RequestType = 'Article'
New Process Type	Borrowing
New Transaction Status	Awaiting Direct Request Sending
Rule Description	Rule to send copyright cleared articles to Direct Request.

Email Notifications

What is it?

When ILLiad generates email messages, it uses email templates that are located in the illiad\Email\ folder on your ILLiad server. These are text files that you can customize, allowing you to communicate more effectively with your patrons. As an added tool, ILLiad allows you to include transaction and user data in your email templates.

How does it help?

Customizing your email templates allows you to communicate consistently with your users. By including frequently used information and ILLiad data, you can eliminate extra typing by your staff.

Getting started

Editing your email templates

Email templates are .txt files located in your **\illiad\Email** directory. By default, ILLiad uses specific templates for certain processes. A complete list of such templates can be found in the ILLiad documentation:

https://prometheus.atlas-sys.com/display/illiad83/Creating+and+Editing+Email+Templates.

You can include ILLiad transaction data in a template by inserting a field tag. Tags begin with <# and end with > (for example, <#PhotoJournalTitle> will insert the Journal Title into your email). You can use any field from the LocalInfo, Transaction, User, and Lender Addresses tables.

> **Tip: Finding field names**
>
> Want to insert a field tag into your email, but you can't remember its exact name? The easiest way to find out is to pop open the Custom Request Search in the ILLiad Client. That will let you browse the Transaction, User, and Lender Addresses tables. For the LocalInfo table, just pull it up in the Customization Manager for easy access.

Cancellations

Set up cancellation processes that best fit your workflow

- Create a list of situations where you cancel requests. Look for common reasons and group requests.
- Suggest alternate actions beyond a simple cancellation that would be helpful for the customer. Here are some ideas to help get you started:

Cancellation situation	Helpful action
Customer submitted a request for a foreign language item…	Use an email routing to contact customer and confirm they want an item in the particular language.
The requested item is available in one of the library's subscription databases…	Use an email routing message to notify customer, include link to library's database portal, and CC a reference librarian who can help the customer.
The request is a duplicate of another already submitted…	Use a custom cancellation reason to inform customer.

If library staff explores a variety of alternate actions they should find there are few times when a request can only be cancelled without further assisting the customer. Take advantage of the linking possibilities and other service contacts in your library. Think of ILL requests not only as requests for items, but also as an opportunity to engage your customers.

Modify your ReasonsForCancellation table

Depending upon the level of customization you'd prefer, you may want to modify your ReasonsForCancellation table in the Customization Manager. This allows you to edit both the ReasonForCancellation and LastNote fields that appear in the Cancel.txt email template.

The table can be found under Borrowing | Cancellations | ReasonsForCancellation. Use the ReasonNumber to set the order in which they appear in the ILLiad Client. The Reason field is the same text displayed in the client.

Modify your Cancel.txt email template

The Cancel.txt email template is important because it is used by each cancellation reason. Like other templates, it can contain information from the LocalInfo, Transactions, and Users tables. It can also use values of the Reason and LastNote fields in the ReasonsForCancellation table.

Consider inserting helpful links in your Cancel.txt email to important research tools, such as LibGuides, or to your Reference department. You could even link out to other search tools, encouraging patrons to try their search again.

Download our sample template for ideas: http://goo.gl/b56SQ. To edit the subject line of these emails, change the value of the Borrowing | Cancellations | CancellationEMailSubject key in the Customziation Manager.

Electronic Delivery Notification

This is a default email that tells users they can logon to ILLiad to pick up their article. However, you add value to these emails by inserting a link to conveniently download the article. For most sites, you can achieve this with the following:

<#SystemURL>/pdf/<#TransactionNumber>.pdf

Download the email template: http://goo.gl/YmJkM

Overdues

One of the more convenient aspects of circulation systems is the due date reminder. Although this is not the default behavior of ILLiad, it can easily be configured to send out due date reminders to your users. By changing the timing and text of your first overdue notice, you can more easily prompt your users to submit renewal requests on their own for items coming due. This can decrease the number of renewals your staff must process manually and also decrease the number of overdue materials.

The first thing you need to do is change the value of the OverdueGraceDays key to a negative number. This tells ILLiad how many days prior to the due date to send out the overdue1.txt email. For instance, if you want the due date reminder to be sent out for items within one week of their due dates, set the value to -7. The OverdueGraceDays ket can be found in the Customization Manager under Borrowing|Overdues.

Next, you should also adjust the settings for the OverdueNoticeOneDays and OverdueNoticeTwoDays accordingly. OverdueNoticeOneDays now serves as the trigger for the first overdue notice. As such, you will likely want to set this value to 1 so that an overdue notice is sent for items 1 day overdue. Likewise, OverdueNoticeTwoDays will serve as the second and final overdue notice. Also, if you have the BlockOnThirdOverdue key active, this email should also notify the user that their account is blocked. It may be a good idea to make this value higher to allow more time before blocking the user's account. For instance, consider making this value 14 to allow 2 weeks between the first overdue notice and the final overdue notice. However, this is entirely up to you.

Lastly, with version 8.3 and above you can now set ILLiad to send out overdue notices automatically as requests enter each overdue category. Simply change the OverdueNoticesActive key to "Yes" in the Customization Manager. By default ILLiad will send notices daily at 8:00 a.m. To customize this, change the OverdueNoticesRunTime key.

Summary of settings:
- **OverdueGraceDays** = -7
- **OverdueNoticeOneDays** = 1
- **OverdueNoticeTwoDays** = 14
- **OverdueNoticesActive** = Yes

Once you have configured ILLiad to send out the due date reminders, the final step is to update your email templates accordingly. The following examples provide users with direct links so that they can quickly and easily renew their items online.

- Download the Overdue1 template: http://goo.gl/DIHNB
- Download the Overdue2 template: http://goo.gl/5CeZZ
- Download the Overdue3 template: http://goo.gl/B4XNb

If you wish to change the subject lines of these emails, then change the following keys in the **Customization Manager** (found under Borrowing | **Overdues**):
- **Overdue1EMailSubject**
- **Overdue2EMailSubject**
- **Overdue3EMailSubject**

Lender Address Maintenance

What is it?

When branches of a library system share an OCLC symbol, you may not know where to return them. ILLiad allows for multiple addresses to be listed under one symbol, and alerts staff to when a new location sends an item, allowing you to add, make changes and save the necessary address information so that you can print out the correct return label when the time comes.

How does it help?

By returning items directly to the correct library, library staff who receive items for other branches do not have to find the correct address themselves and re-mail material. Loans will be returned more quickly, as well, leaving less chance for loss or staff time following up on missing items that are still in transit, or possibly sitting on the wrong library's question shelf.

Workflow

1. When you check in an item from a new library, a new branch, or when the old address has changed in OCLC, an Address Screen will pop up first.
2. Look at the top left address – the OCLC information – and compare it to the bottom left, making any changes by clicking on the down arrow keys next to each field.
   a. If the changes are for the same library, just click on **Save** on top.
   b. If the address is for another location entirely, check to see if it is already listed on the right side of the screen.
      i. If so, click on that address to choose it (and make sure it is exactly the same.)
      ii. If not, add the new address by using the arrows and then click on **New**

Tip: Merging duplicate addresses

Did you accidentally save the same address twice? To remove the duplicate, simply merge the two addresses. The easiest way to do this is as follows:
1. In the Lender Address search box, search for the library's OCLC symbol.
2. In the results list, CTRL+Click the two libraries you'd like to merge.
3. Click the Merge Lenders button in the ribbon.
4. Determine which of the two (the new or existing) you want to keep and click the appropriate button.
5. Repeat steps 2-4 if you have any remaining duplicates.

More info

ILLiad documentation regarding The Lender Address Form
https://prometheus.atlas-sys.com/display/ILLiad/The+Lender+Address+Form

ShareILL wiki
http://www.shareill.org/index.php?title=Processing_center

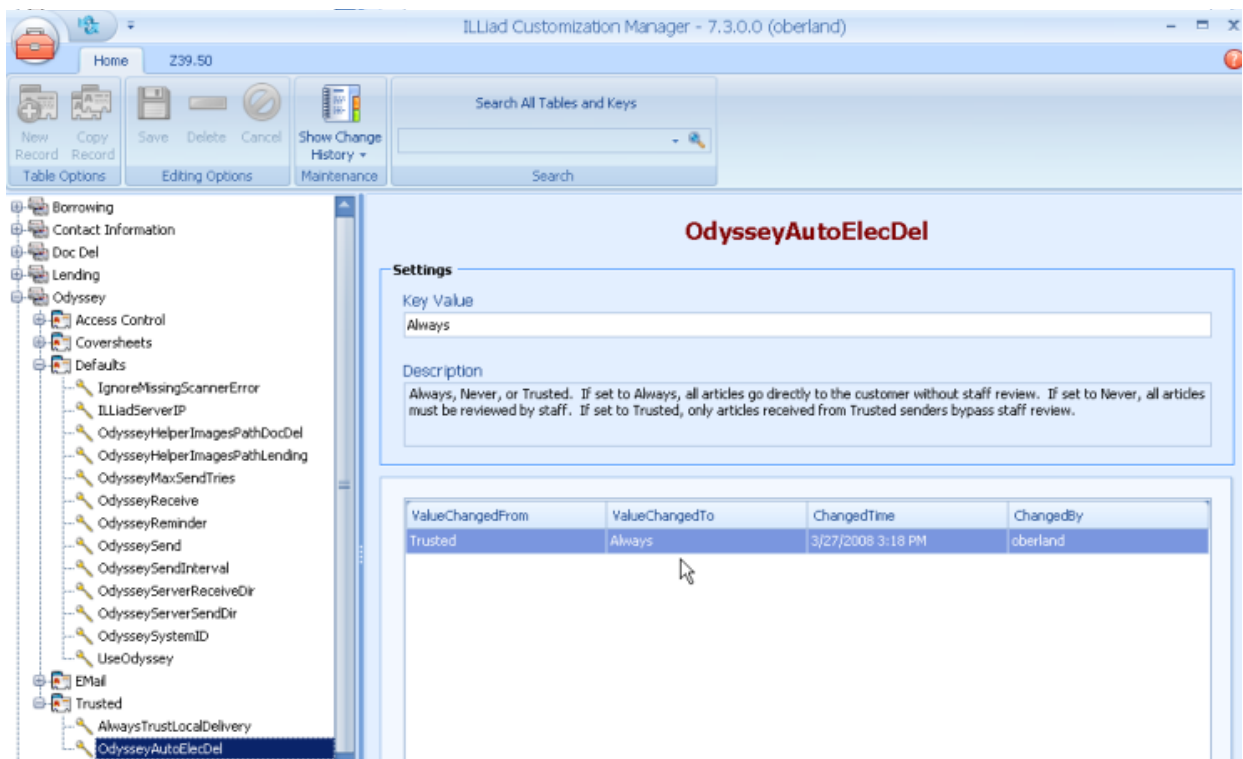# Odyssey Trusted Sender

What is it?

Odyssey Trusted Sender allows you to indicate that a lending library reliably sends good electronic document copies and then automates the delivery of that trusted library's documents.

How does it help?

When electronic delivery processing is mediated by library staff, the electronic document must be downloaded from the server, visually inspected for quality, and then uploaded to the server. The file transfer time is wasteful and unnecessary for libraries that send quality copies. When you use Odyssey Trusted Sender documents are delivered directly to the Web and patrons are automatically notified. As soon as the lending library sends the document, the transaction is complete!

Getting started

Logon to the ILLiad **Customization Manager**. Then select **Odyssey**, then **Trusted**, and finally **OdysseyAutoElecDel**. Type in "**Always**" as the Key Value, and **save** your changes.

Patron Authentication

What is it?

There are several different methods to authenticate users – Basic Authentication, ILLiad Exclusive Authentication, LDAP, implementing a User Gateway, etc. Whichever way your library chooses to clear users for interlibrary loan privileges, it is important to keep on top of verifying, merging, and disavowing. Of particular importance is the routing rule that prohibits un-cleared users' requests from automatically going through Direct Request.

How does it help?

The routing rule prevents un-cleared users from requesting items they potentially may not be able to request due to their status at your institution. Various authentication methods can help expedite your patrons' requests and decrease the amount of time between request submission and receipt of item.

Lightweight Directory Access Protocol (LDAP) is a local network directory service. If available at your institution, ILLiad can use it to automatically authenticate your users. When a user attempts to login to the ILLiad webpages, it will check against your institution's user directory using LDAP. If the username exists, then the user is granted access. Otherwise the user will not be able to logon to ILLiad.

There are many benefits to using LDAP, which is utilized at many institutions:
- You no longer have to manually verify and clear customers, saving you time.
- Users do not have to maintain another username and password just for ILLiad.
- Staff do not have to worry about resetting lost passwords.
- Staff can still block, disavow, and create users.

For information about LDAP at your institution, contact your information technology department.

Getting started

In the **Customization Manager**, go to **System|Routing|Routing**. From your list of routing rules, select the rule with the description "**Default Direct Request Rule**."

Append the following to the end of the **MatchString**:

<div align="center">

and u.Cleared = 'Yes'

</div>

Edit Row	
Rule No	!¦
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Request Processing
Match String	t.ISSN >'' and t.RequestType = 'Loan' and (t.LendingString = '' or t.LendingString is NULL) and u.Cleared = 'Yes'
New Process Type	Borrowing
New Transaction Status	Awaiting Direct Request Sending
Rule Description	Default Direct Request rule

This will send all 'Unclear' customer requests into your Awaiting Request Processing queue for staff to process once authentication has occurred.

More information

ILLiad Documentation: Clearing Customer Authenication

https://prometheus.atlas-sys.com/display/ILLiad83/Clearing+Customer+Authentication

ILLiad Documentation: PatronAuthenticationMethods

https://prometheus.atlas-sys.com/display/ILLiad83/Patron+Authentication+Methods

ILLiad Documentation: LDAP Authentication

https://prometheus.atlas-sys.com/display/ILLiad83/LDAP+Authentication

ILLiad Documentation: The ILLiad Database Manager

https://prometheus.atlas-sys.com/display/illiad83/The+ILLiad+Database+Manager

Caution!

Deleting records using the Database Manager is permanent. Always backup your data first. If you are hosted by OCLC, then contact them if you are considering deleting patron records.
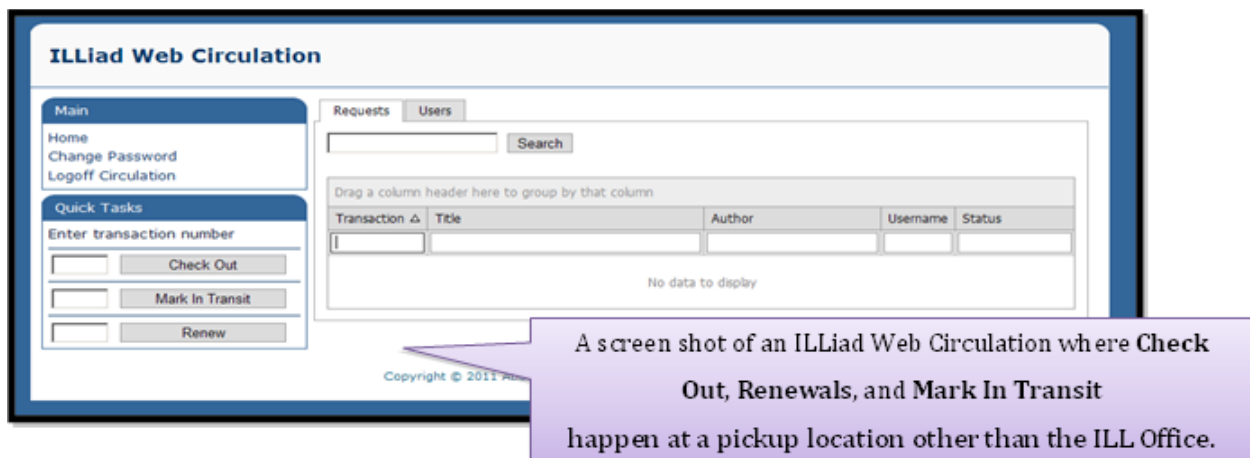
Web Circulation

What is it?

The ILLiad Web Circ module allows sites that use a remote desk for circulating ILL materials to have access to ILLiad circulation functions without having the ILLiad Client installed on circulation workstations.

With the Web Circ module, users can log into a restricted web view of ILLiad and check items out, check items in, renew, and mark an item as In Transit. Permissions can be restricted so the staff using the Web Circ module only have access to that module and cannot use the ILLiad Client, Web Reports or any ILLiad administrative tools.

How does it help?

Using the ILLiad Web Circ module can eliminate the need to print Loan Slips (check-out slips), and records the exact time/date when the patron picked up and/or returned the item for more precise tracking.

A screen shot of an ILLiad Web Circulation where Check Out, Renewals, and Mark In Transit happen at a pickup location other than the ILL Office.

Getting started

The actual Web Circulation module is installed by default with your other ILLiad webpages. To access it, simply navigate to your ILLiad webpages and add "/WebCirc/Logon.aspx" to the end of your base URL.

For example, self-hosted sites may look like:
https://illiad.library.edu/WebCirc/Logon.aspx

For OCLC hosted sites, the URL may look like:
http://libraryname.illiad.oclc.org/illiad/WebCirc/Logon.aspx

Web Circulation allows you to perform several processes, which can be turned on and off in the Customization Manager (under Web Interface | Web Circulation). These are explained in the table below.

Key	Explanation
WebCircEnableCheckOut	Will change the transaction status of the request to Checked Out to Customer
WebCircEnableCheckIn	Will change the transaction status of the request to Awaiting Return Label Printing.
WebCircEnableMarkInTransit	Will change the transaction status of the request to In Transit.
WebCircEnableRenewal	Process in ILLiad Web Circulation is very similar to the renewals that users can request themselves in the borrowing DLL.
WebCircEnableCirculationForBlockedUsers	Configures whether staff users can check out and renew for blocked users. If this value is set to false, a quick check out or renewal will cause the VerifyUserCleared status message to display.

Once this is ready to go, staff must be given access to Web Circulation from within the ILLiad Staff Manager. Logon to the ILLiad Staff Manager and, for each individual, be sure to select Web Circulation Access. (Alternatively, you could create a generic "Circulation" staff account that all staff use.)

IDS PROJECT

Workflow Toolkit
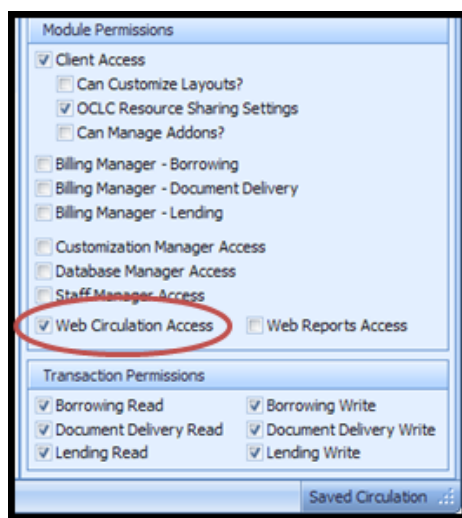
Document Delivery

- Delivering Items in Your Physical Collection
- Delivering Locally Held E-Journal Articles

A **unified community** of trust and support built around a critical and clearly understood purpose: **effective resource sharing.**

information delivery services

IDS

Delivering Items In Your Physical Collection

What is it?

Most ILS products offer a hold request system that allows patrons to request materials held in your library's collection. But as we all know, it's not uncommon to encounter an ILL request for such items anyway. ILLiad's Document Delivery module offers your library a great way to manage such hold requests that originate in ILL.

How does it help?

Instead of cancelling loan requests that are locally held in your collection, you can supply those books and media materials to your patrons quickly and easily. Not only does this provide a good service to your patrons, it is also a great way to get the most out of ILLiad's Document Delivery module. This works for circulating items and you can also use ILLiad to refer your patrons to non-circulating items (padding your Doc Del stats, instead of negating your Borrowing stats).

Getting Started

Create a routing rule to bypass Awaiting Document Delivery Processing

When you encounter a locally held item in Borrowing, it's common to copy the call number and location from the Z39.50 lookup before routing it to Document Delivery. However, ILLiad does not place such requests in Awaiting DD Stacks Searching, meaning you have to manually route those requests again if you want to print pull slips right away.

You can bypass this behavior with a very simple routing rule. Then when you click on the Route To Document Delivery button in borrowing, items with locations will go straight to Awaiting DD Stacks Searching.

Rule No	(This can go at the end of your list)
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Document Delivery Processing
Match String	t.Location <> NULL AND t.Location > ''
New Process Type	Doc Del
New Transaction Status	Awaiting DD Stacks Searching
Description	Routes DD requests from Borrowing right to Awaiting DD Stacks Searching for pull slip printing.

Workflow

Once your routing rule is created, you are ready to get started. Here's the recommended workflow:

1. When you encounter a locally held item, click on the **Z39.50** tab.
2. Locate the item in your catalog and click the **Copy Info** button. This will copy the call number and location into the corresponding ILLiad request fields.
3. Click the **Route to Document Delivery** button.
4. Once you have finished processing your borrowing requests, switch to the **Document Delivery** module.
5. Click on the **Print Pull Slips** button.
6. After printing your slips and searching the stacks, you are now ready to **Update Stacks Search** in the **Document Delivery** ribbon.
7. Just like in Lending, scan each Transaction Number to **Mark Found** or **Mark Not Found**. (Items that are not on the shelf can be routed back to Borrowing for fulfillment.)
8. When finished, do the following based upon the request type and search result:
    a. **Articles (Found)** -- as in Lending, you just need to scan and deliver the article to your patron. You can do this using your normal scanning workflow (using the ILLiad Client or Odyssey Helper). Once delivered, requests are updated to Delivered to Web.
    b. **Loans (Found)** -- place the items on hold for your patrons using your ILS. Once on hold, you can make these available per your library's local procedures. When finished, click the **Contact Customers** button and notify your patrons to pick up their materials.
    c. **Loans & Articles (Not Found)** -- items that were not found on the shelf need to be routed back to Borrowing for fulfillment. To do this, simply click on the **Move Items Not Found to Borrowing** button in the Document Delivery ribbon.

More information

ILLiad documentation for External Systems Interfaces (Z39.50)

https://prometheus.atlas-sys.com/display/illiad83/External+Systems+Interfaces

Delivering Locally Held E-Journal Articles

What is it?

By routing requests from Awaiting Request Processing in Borrowing to In DD Stacks Searching in Document Delivery, you can quickly and easily supply e-journal articles to your patrons using Odyssey Helper.

How does it help?

Instead of cancelling article requests that are locally held in your e-journals, you can supply those articles to your patrons quickly and easily. Not only does this provide a good service to your patrons, it is also a great way to get the most out of ILLiad's Document Delivery module.

Getting Started

This is a very simple workflow to implement. When you encounter a locally held journal article in Borrowing, do the following:

1. Save the PDF of the journal article to the folder you specified in the Customization Manager's **OdysseyHelperImagesPathDocDel** key. Be sure to name the file as the request's transaction number (i.e. 12345.pdf).
2. Click the **Route to Document Delivery** drop-down menu (the bottom half of the button) and select **In DD Stacks Searching**.
3. When finished processing requests, simply open **Odyssey Helper** and switch to the **Document Delivery process type**.
4. All of the documents waiting to send should appear. Click the **Deliver** button and each should be sent to their respective users.

Workflow Toolkit

Lending

- Article Exchange
- Effective Billing: IFM & Billing Manager
- Lending E-Journal Articles

A unified community of trust and support built around a critical and clearly understood purpose: effective resource sharing.

information delivery services

IDS

Article Exchange

What is it?

Developed by OCLC,

> "The Article Exchange document-sharing site provides a single, secure location where lending libraries can place requested documents and library users can retrieve articles or book chapters obtained for them via interlibrary loan. This site adds convenience, security and enhanced copyright compliance to article sharing through interlibrary loan. Article Exchange is accessible… through an ILLiad Addon." (http://www.oclc.org/resourcesharing/features/articleexchange/default.htm)

Article Exchange is not a replacement for Odyssey. It is meant to be used by the lending library to securely send articles or book chapters to those libraries that do not have Odyssey software installed. Article Exchange provides a seamless way to process requests that would otherwise have to be filled via email, fax or Ariel.

How does it help?

Article Exchange allows you to securely send articles to non-Odyssey libraries right from within the client. No need to open separate Email or Ariel applications.

Getting started

Install the OCLC Article Exchange addon

Atlas and OCLC have developed an Article Exchange addon that allows you to quickly and easily share documents without leaving the ILLiad client. This addon, like others, is available from the ILLiad Addons Directory: https://prometheus.atlas-sys.com/display/ILLiadAddons/OCLC+Article+Exchange

To configure the addon, open the ILLiad client, click on the System ribbon, and then click the Manage Addons button. Click on the OCLC Article Exchange addon and follow the instructions to configure it. When finished, save your changes and click the Refresh Cache button.

Create an Email Routing to notify libraries

In order to alert libraries that an article is ready for download from Article Exchange, you should create an Email Routing. Because the addon can import the necessary URL and password into the Call Number and Location fields, embedding these into the email template eliminates any manual text entry. You can download a sample template at: http://goo.gl/5IeKz

Next, open your **Customization Manager** and go to the **System | Email | EmailRouting** table. Create a new email routing with the following settings:

Process Type	Lending
Name	Article Exchange
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Interlibrary Loan <#ILLNumber> Delivery
DefaultFromAddress	[Insert your email address here]
DeafultFromName	[Insert your institution name here]
DefaultStatus	
FileNameLoan	ArticleExchange.txt
FileNameArticle	ArticleExchange.txt

Create a routing rule that avoids printing shipping labels

If you haven't already created a routing rule that avoids printing shipping labels at all, you will at least want to create a rule that avoids printing shipping labels for Article Exchange requests. While still in the **Customization Manager**, head to the **System | Routing | Routing** table. Then create the following routing rule (courtesy Atlas Systems):

RuleNo	[next available]
RuleActive	Yes
ProcessType	Lending
TransactionStatus	Awaiting Shipping Label Printing
MatchString	t.CallNumber like 'http://oc.lc%'
NewProcessType	Lending
NewTransactionStatus	Request Finished
Rule Description	Skips shipping label printing for articles sent via Article Exchange

Workflow

1. Save your PDF to a local or network share folder.
2. Open the Article Exchange (**OCLC AE**) addon in the client.

3. Upload your file to Article Exchange by clicking the **Browse** button in the addon. Once selected, click the **Drop File** button.

4. You will be taken back to the **Detail** string and the **Call Number** and **Location** fields should now contain the article's **URL** and **password**.

5. Next, go to **Send Email** and select the **Article Exchange** email. Click **Send** to email the delivery notice to the library.
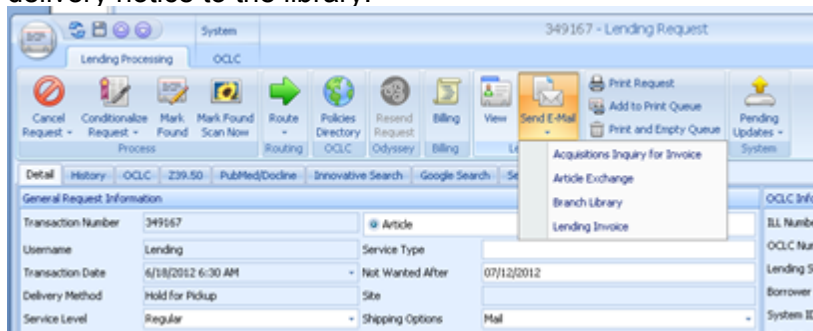
6. Back in the **Detail** tab, click the **Mark Found** button in the ribbon.

More information

Atlas video tutorial for Article Exchange

http://www.atlas-sys.com/training/tutorials/ILLiad8/Lending82/player.html

Atlas workflow tips for using Article Exchange

http://www.atlas-sys.com/training/tutorials/ILLiad8/Lending82/data/downloads/82lendingenhancements.pdf

OCLC Article Exchange product description

http://www.oclc.org/resourcesharing/features/articleexchange/default.htm

Effective Billing: IFM & Billing Manager

What is it?

The ILL Fee Management (IFM) is a feature provided by OCLC to prevent unnecessary time and money spent on processing invoices. OCLC is capable of tracing each activity made between each library. With this resource, IFM immediately knows when to charge or credit the library's OCLC account and streamlines the billing system. This financial feature can easily be activated on ILLiad by changing the payment method from your Constant Data's max cost.

How does it help?

Once IFM is activated your OCLC account will automatically credit/charge for each request filled by/for your library. This will essentially reduce the extra time and costs spent on processing invoices. OCLC keeps a chart of the activities used with IFM, so it becomes easier to work or collect statistics for the department. By using IFM, you may relieve the accounting department from the extra workload and help to become more eco-friendly as well.

Getting started

ILL Fee Management (IFM)

To activate IFM from within ILLiad:
1. Go to **System** tab and click into **Resource Sharing Settings**
2. Go to **Constant Data** tab and choose **Default** on the scroll down bar
3. Go to **Max Cost** section and choose **IFM** on the type scroll down bar
4. Of course, do not forget to **save**.

Below is a workflow diagram of billing without IFM:
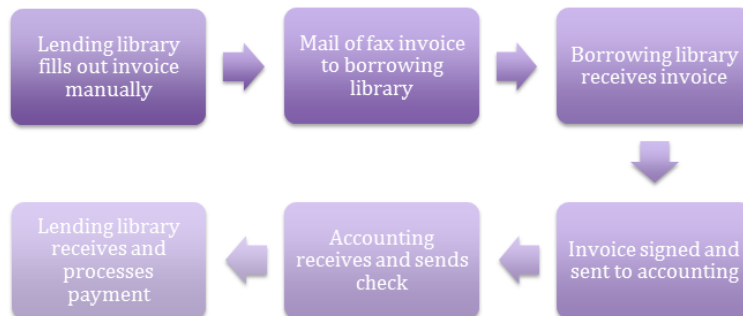
Compare that to a diagram of billing with IFM:
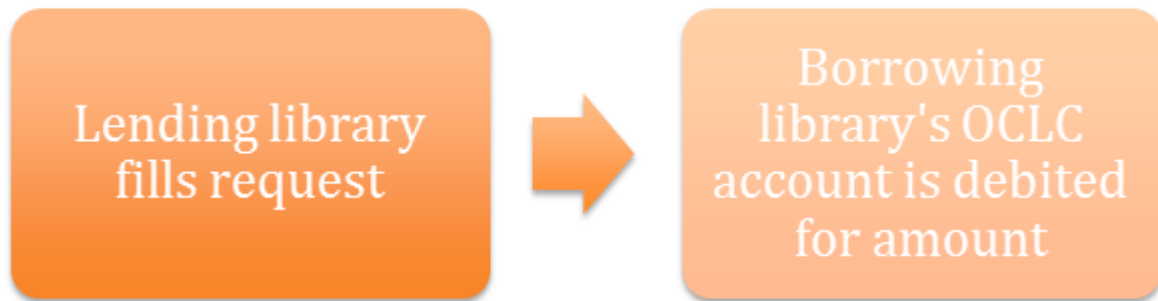
Billing Manager

Although IFM is the most convenient billing option to choose, some institutions might not see the value of it. However, IFM is not the only option given to reduce the time given to paper invoices. ILLiad also has the **Billing Manager**, which needs to be activated from **ILLiad Staff Manager**. Unlike IFM, Billing Manager is used for organizing and saving invoices within a time period to be sent manually to other institutions in batches. This method still consumes less time and costs compared to processing paper invoices.

Atlas has produced great documentation for using the Billing Manager. To get started, check out the ILLiad documentation for Billing Manager Basics:
https://prometheus.atlas-sys.com/display/ILLiad83/Billing+Manager+Basics

Billing Manager on a Shared Server
Contributed by Heather L. Brown, UNMC Library.

Price structure and invoices can be customized for libraries in the shared server environment. When the respective libraries have different fee structures, libraries can customize billing additions, defaults, service levels, etc. in the Customization Manager. The primary library can choose not to, but other libraries should preface the billing category with their NVTGC.

The key value for **WebDefaultBillingCategory** and L**endingBillingDefaultCategory** should be changed to reflect these differences in price structure.
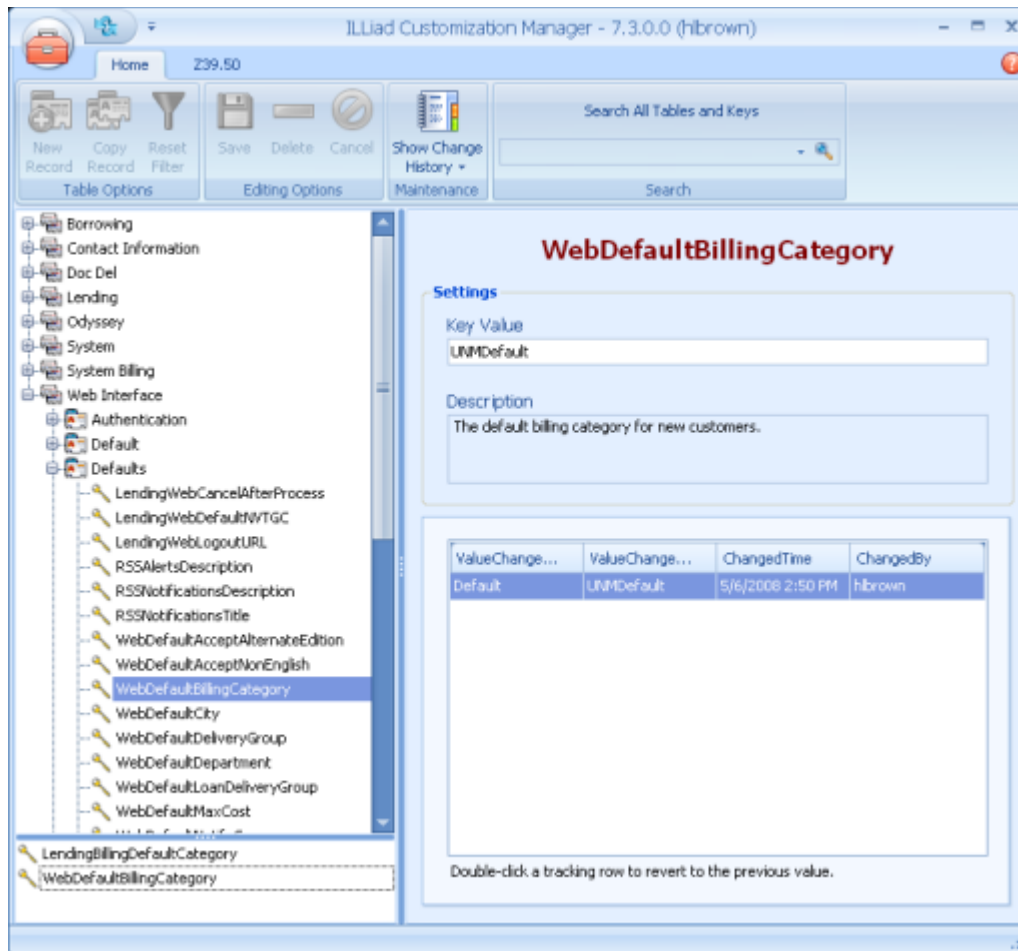
After customizing your invoices, save them to the appropriate server folder and add your NVTGC to the file name (e.g. UNMBorrowingBillingManagerInvoice.doc). In the Customization Manager, go to **Borrowing**, then **Billing**, and then **BillingMonthlyInvoiceBorrowing**.

Next, go to **Doc Del**, then **Billing**, and then **BillingMonthlyInvoiceDocDel**.

Finally, go to **Lending**, then **Billing**, then **BillingMonthlyInvoiceLending** and change the Key Value to the appropriate file name.

Lending E-Journal Articles

What is it?

As the ratio of electronic to print journal holdings continues to grow at most libraries, lending from these resources is becoming increasingly important for ILL departments. However, the biggest hangup has not been the delivery itself, but the licensing. In many cases, ILL licenses are simply not known to many ILL staff -- preventing sharing from e-journals even though many in fact have ILL-friendly licenses. By using an ILLiad addon that combines your link resolver with the generic licensing information found in the IDS Project's ALIAS database, you can be confident sharing your e-journal content with other libraries.

How does it help?

Not only do these addons demystify the process of sharing your e-journal articles, they also speed up your workflow by making these articles just a few clicks away. Because there's no physical copying involved, you can deliver these articles in a fraction of the time it takes to fill the same requests from your print holdings. This saves time, while also allowing you to vastly improve your lending fill rates.

Getting started

Install the addon for your link resolver

There are currently addons avaiable for the two most popular link resolver products: 360 Link by Serials Solutions and SFX by Ex Libris. You can download them from the ILLiad Addons Directory:

- Serials Solutions: https://prometheus.atlas-sys.com/display/ILLiadAddons/Serials+Solutions+Citation+Linker
- SFX: https://prometheus.atlas-sys.com/display/ILLiadAddons/SFX+Linker+with+ALIAS

To install the addon, simply extract it to your \ILLiad\Addons folder.

Each addon has its own configuration settings as indicated in the Addons Directory. To configure the addon, open your ILLiad client, click on the System ribbon, and then click the Manage Addons button. Scroll down to your addon and click on it to bring up its options at the bottom of the Manage Addons window. Enter the required settings in the *Value* column, save your changes, and then click the Refresh Cache button to start using your addon.

Workflow

1. When processing an article request, click on the **Serials Solutions** or **SFX** addon.
2. Once the addon loads, you'll be shown a list of available resources (if any) and their ILL licenses:
   a. **ILL OK** -- you can lend the article, no strings attached. Proceed to step 3.
   b. **ILL OK, Print First** -- you can lend the article so long as you print it first, rescan it, and deliver it. Proceed to step 3.
   c. **ILL OK, Print first, non-profit only** -- like option B, but you can only supply the article to non-profit institutions. Proceed to step 3.
   d. **ILL NOT OK** -- you are not allowed to lend the article from your e-journal. Check for print holdings or cancel the request.
   e. **License information not available** -- this provider has not been added to the ALIAS database. Lend at your own discretion.
   f. **ILL Silent** -- the lender has not specified whether or not ILL is OK. Lend at your own discretion.
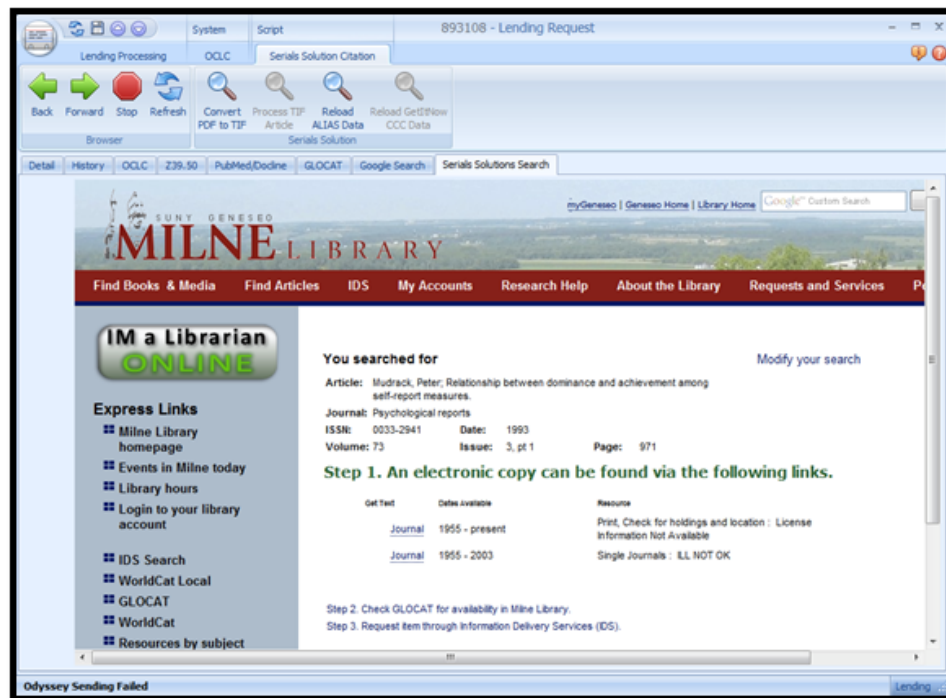
3. Download the PDF to a local or networked folder -- either works. Be sure to name it as the transaction number (i.e. 12345.pdf).
4. Return to the **Detail** tab and look at the Library's Odyssey field to determine if it's an Odyssey library.
   a. **Odyssey libraries**: click the **Mark Found Scan Now** button in the Lending ribbon. Once the Odyssey window appears, import the PDF and click **Deliver**.
      ■ *If you'd rather send articles in batch*, instead route the article to **In Stacks Searching**. Then use **Odyssey Helper** to deliver all of your articles at once.
   b. **Non-Odyssey libraries**: deliver via Article Exchange or Email. Then click the **Mark Found** button.

Workflow Toolkit

Universal

- Adding a New IDS Project Member
- Addons
- Custom Queues
- Customizing Layouts
- Email Routing
- Network Scanning
- Odyssey Helper
- Print Templates
- Shared Servers and NVTGC
- Stale Request Processing
- System Alerts
- Working with Library Groups

A unified community of trust and support built around a critical and clearly understood purpose: effective resource sharing.

information delivery services

IDS

Adding a New IDS Project Member

What is it?

This explains the three steps your library needs to take when a new member library is added to the Project: Exempt from the library from Billing, add the library to a Library Group, and add the library to a Custom Holdings Group.

How does it help?

Properly setting up a new library will ensure new incoming requests from that library are imported into the correct lending queue, that the library will not be billed inadvertently, and that your library can begin using their library for borrowing purposes.

Getting Started

1) **Making a Library Partner Exempt from Billing**

   a) In the ILLiad Client, <type> the library's symbol and <click> **Search** to open the library in the Lender Address form
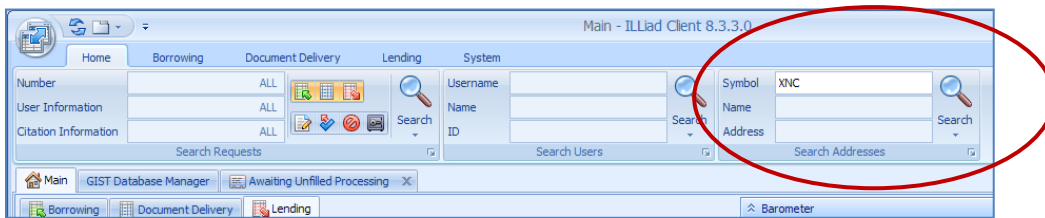
   b) Change the **Billing Category** to **Exempt**, edit the **Copy/Loan Charge** fields to reflect $0.00

   Change the **Billing Category** to **Exempt** and update any Copy Charge/Loan Charge fields to $0.00 if applicable.
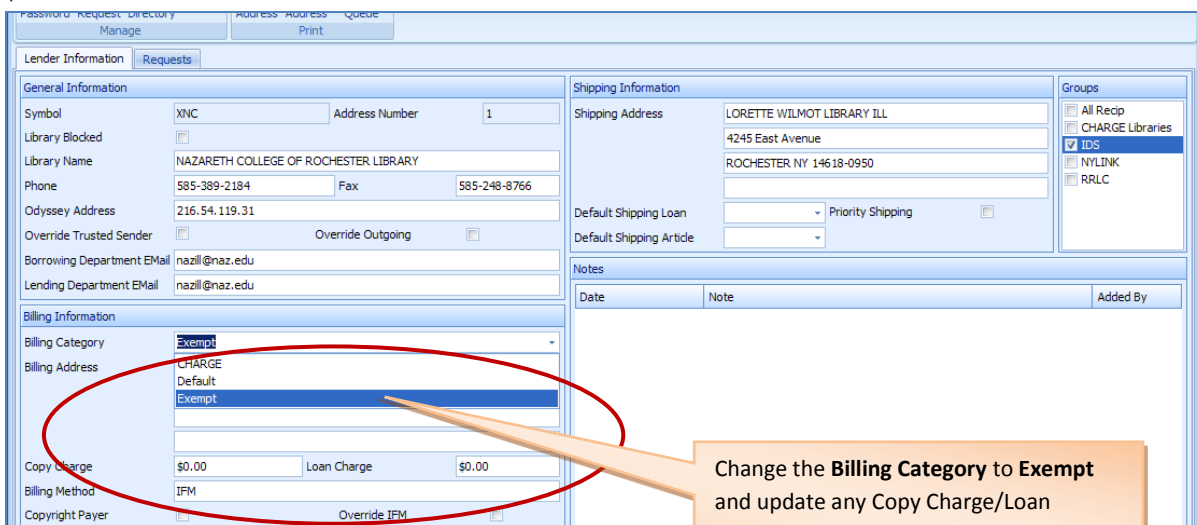
   c) <click> **Save** icon.

2) **Adding a Library Partner to a Library Group**

    a) Still in the Lender Address form, click the group name you assigned to IDS libraries. This example shows group name = **IDS**

NOTE: If you don't have an IDS group set up, see Section on
Working with Library Groups in the Workflow Toolkit.

3) **Adding a Library Partner to the IDS Custom Holdings Group**

Each new IDS library will need to be added to the corresponding Custom Holdings Group. For further instructions as to how to add a library to your IDS Custom Holdings Group, please refer to the Workflow Toolkit. The **Custom Holdings** section can be found behind the section **Borrowing**.

Remember, the current list of active IDS member libraries can be located *only after* logging into the IDSProject.org website.

Addons

What is it?

Addons are much like web browser extensions in that they add additional functionality to the ILLiad client. Each addon appears as an extra tab within an ILLiad request, allowing you to easily include them in your workflow. Also, many addons will automatically search for the loan or article you are trying to find.

Some even allow you to automatically copy data from the website into the ILLiad request, while others (such as the Serials Solutions and SFX addons) combine data from external resources to make important information easier to access.

How does it help?

Because anyone can develop and contribute to the growing number of available addons, there are numerous ways they can help your workflow. In general, though, here are a few key points:

- No more toggling between ILLiad and your web browser for frequently used resources (such as your catalog, journal finder, Google, etc.)
- E-journal license data integrated with your e-journal holdings (available in both the Serials Solutions and SFX addons with the ALIAS API)
- Automates tedious manual searching—no more copying & pasting or typing titles into search boxes
- Flexibility: share addons over a network just like print and email templates, then each staff member can decide which addons to turn on or off in *their* client settings.

Getting Started

Enabling addon management in the Staff Manager

In order to manage your addon settings, you must first have the permission in ILLiad's Staff Manager. This doesn't mean only certain people can use addons; rather, it just limits the number of people who can configure the settings of their addons.

To do this, open the **Staff Manager** and, for each desired user, activate **Can Manage Addons?** under **Client Access**.
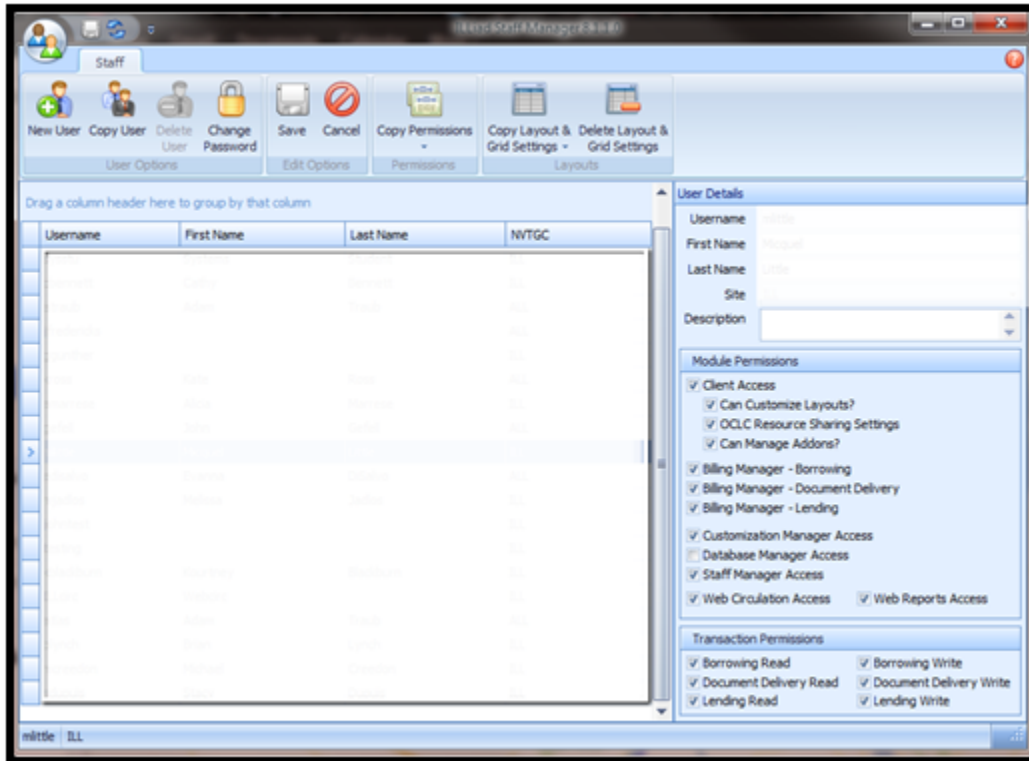
Now each of these users will see the Manage Addons button in the System ribbon of the ILLiad client, allowing them to individually turn addons on and off, while also change each addon's configuration settings.

Tip: Addons a la carte

Addons, like custom layouts, can be shared -- but each individual staff user can customize them to meet their own needs. These changes are not shared so one staff member's customizations will not affect any other staff member. This is helpful because staff can choose to disable addons they never use (sparing system memory and improving the overall speed of their clients).

Sharing addons over a network

Like print templates and email templates, addons can be shared over a network. Any addon that is adding to this shared Addons folder will be downloaded to each individual staff client. This is helpful because you don't have to individually distribute addons workstation by workstation. By setting the shared network addons' configurations in advance, this can also spare your staff from having to configure individual addons as well.

Tip: Preparing addons before sharing

If you want to test and configure an addon yourself before sharing it with staff over the network, simply install the addon to your own computer's addons directory. Turn it on, configure it, and try it out. When you're ready to distribute the addons with these settings, just copy it from your local directory to the shared Addons folder.

If you wish to share addons in this way, check out the ILLiad documentation:
https://prometheus.atlas-sys.com/display/ILLiadAddons/ILLiad+Addon+Technical+Overview

Go addon shopping

Many addons are now available from the ILLiad Addons Directory:
https://prometheus.atlas-sys.com/display/ILLiadAddons/Addons+Directory

With so many to choose from, the following activity might help you figure out which would most benefit your workflow.

Part 1.

In Column A below, write down the websites or resources you commonly use during request processing (i.e. your library catalog, journal finder, Google, etc.). Then, browse the ILLiad Addons Directory. Did you find a matching addon? If so, indicate that in Column B.

A. Websites/resources you commonly use	B. Available as addon?

Part 2.

For each available addon, run through the following installation checklist:

Addon Name	1. Download	2. Unzip to Addons folder	3. Configure	4. Share

Custom Queues

What is it?

Custom Queues allow you to set up holding queues to which you can route transactions in the ILLiad client. These queues are available in each module of ILLiad, and once created, appear in the Request Groups on the Home Page and under the Route menu on the Request Form. The EMailRouting and Routing tables can also use them as destination queues.

For example, to create a queue called "Awaiting Reference Staff Processing" so that your reference staff would be able to review certain requests when needed, you would add a custom queue in the CustomQueues table.

How does it help?

Custom Queues are a great way to designate and/or pull out requests that require special handling by placing them in a Queue for appropriate staff handling. You can also use them in conjunction with e-mail templates and now with Version 8.1 they can be excluded from the barometer count.

For example, to create a queue called "Awaiting Lending Library Invoice". Customer A made contact that they lost their ILL book. After emailing the Lending Library an inquiry requesting an Invoice for Replacement, the lost book request would be routed to this queue. This takes it out of the "Checked Out to Customer" queue (avoiding accidental sends of overdue notices to Customer A who contacted you), and allows you to see immediately invoice requests you need to follow up on.

Getting started

The easy part of custom queues is actually creating them. In the **Customization Manager**, navigate to **System | Custom Queues** and select the **Custom Queues** table. Each queue has three settings:
- **Queue Name** -- what you want your queue to be called. (Remember: the queue name doubles as the Transaction Status so it will be visible to your users via the ILLiad webpages. Avoid things such as "Awaiting Annoying User Processing.")
- **NVTGC** -- this will always be ILL unless you are in a shared server environment.
- **Process Type** -- where you queue will reside: Borrowing, Lending, or Doc Del (for Document Delivery).

The hard part is figuring out whether or not a custom queue is the best solution for your workflow. In general, too many queues are hard to keep track of and its easy for requests to languish for long periods of time. In that sense, it's best not to create a queue for every possible contingency. Instead, consider statuses that are useful but not included in ILLiad, such as:
- **Awaiting Extensive Searching** -- this use to be standard but isn't in ILLiad 8. This is great when staff encounter hard-to-fill requests that need additional time.
- **Claimed Returned** -- items that were not checked in, but your patron claims to have returned (this is common in many circulation systems).

- **Billed for Replacement** -- combined with an email routing, you can notify a patron or library of a billing charge and then route the request to this queue (helping you keep track of invoiced materials).
- **Awaiting Priority Lending Processing** -- this could be used in conjunction with the Borrower Status table, allowing you to prioritize requests from libraries in your consortia or other reciprocal groups. For more information on this table, see: https://prometheus.atlas-sys.com/display/illiad83/ System+Routing+%28Routing+Rules%29#SystemRouting%28RoutingRules%29- LendingImportQueues%28BorrowerStatus%29
- **Awaiting Acquisitions Processing** -- if you have a purchase on demand workflow, this is one queue you could use to separate your purchase requests from your ILL requests.
- **Awaiting Purchase Delivery** -- in conjunction with Awaiting Acquisitions Processing, use this queue for items you've purchased but have not yet received.

The possibilities are numerous, but just be sure to be thoughtful with your custom queues to avoid overcrowding (there can be too much of a good thing!).

Customizing Layouts

What is it?

ILLiad 8 enables you to customize the screens you are looking at, allowing you to hide unused fields from view, bring other favorites forward onto your desktop, and move the entire layout around.

How does it help?

Spending a little time customizing your layouts, or those seen by your student help, can reduce eye strain, reorganize information according to what you want to see, and improve processing time.

Getting started

Main tab

Whenever you launch ILLiad, you start by viewing the Main tab. Here you find the Borrowing, Lending, and Document Delivery groups, with each displaying the list of available queues. By default, these queues are listed in alphabetical order -- including terminal queues such as Cancelled by ILL Staff.

This default arrangement can be difficult to navigate over time, especially when temporary queues come and go (such as Awaiting Direct Request Sending or Awaiting Renewal OK Processing). To make these easier to browse, you should consider categorizing your queues into groups and hiding terminal queues that just take up space. These small changes can go a long way towards making your daily workflow more efficient.

To create a category, **right click on a queue** and select **Add to New Category**. Then simply give the category a name and click OK. To add other queues to this category, simply drag and drop them under the category name. You can rearrange your categories by dragging and dropping the category names one above the other.

For example, consider the following groups for Borrowing:
- Requests (Note: this is the default category for all queues)
  - Awaiting Request Processing
  - Awaiting Conditional Processing
  - Awaiting Unfilled Processing
  - Awaiting Extensive Searching
  - Request Sent
- Renewals, Recalls, & Cancellations
  - Awaiting Renewal OK Processing
  - Awaiting Renewal Denied Processing
  - Awaiting Recalled Processing
- Received
  - Awaiting Post Receipt Processing
  - Awaiting Customer Contact

- ○ Customer Notified via E-Mail
- ○ Customer Notified via Phone
- ○ Odyssey Document Received
- ○ Checked Out to Customer

You can create similar groups for Lending and Document Delivery, as well, organizing the highest priority queues in one or two categories. You can then drag and drop these categories to the top of each module, while collapsing the others so you can easily find what you need to work on.

To hide a queue, simply **right click** on it and select **Hide Queue**. It will then disappear from view. For all three modules, consider hiding the following queues:
- Cancelled by ILL Staff
- Request Finished
- Delivered to Web (Borrowing & Document Delivery only)
- Request Conditionalized (Lending only)

If you make a mistake while customizing your Main tab layout, you can start over by right clicking anywhere in the Main tab area and selecting Reset to Default View. Note, however, that this will remove all customizations you previously made.

Request Queues

ILLiad 8 provides a lot of flexibility for viewing request queues, such as Awaiting Request Processing. Although it's recommended that you still sort all of your requests ascending by Transaction Number (First In, First Out), you can clear out the clutter by rearranging and hiding column headings. Because each queue has its own layout, what you change in Awaiting Request Processing won't affect how you view Awaiting Unfilled Processing.

For example, by default ILLiad makes each column the same width. This works for things like the Transaction Number and Request Type, but not for Loan Title, Photo Article Title, etc. You can drag the edges of columns to adjust their width (just like Microsoft Excel), or you can automatically adjust *all* of the columns by right-clicking on a heading and selecting "Best Fit (all columns)." This should make it easier to read while you're browsing the queue.

In addition, you can rearrange columns into whichever order best suits you. Simply drag and drop a column into the desired position. For example, drag and drop the Not Wanted After column next to the Transaction Number column. That way you can see how soon your patron needs an item in relation to its order in the queue. This is especially helpful for requests in Awaiting Unfilled Processing.

Request Layouts

Perhaps the most powerful customization you can make is at the request level. Borrowing, Lending, and Document Delivery each has its own layout so you can create a unique custom layout for each module.

To begin, just **right-click** anywhere in the **Detail** group and select **Customize Layout**. The Detail group becomes shaded and the **Customization menu** appears. You can now do the following to customize your layouts:
- **Rename field, group, and tab labels** -- right-click on a label and select Rename.
- **Hide field labels** -- right-click on a label and select Hide Text.

- **Hide fields** -- right click on a field and select Hide Item.
- **Group fields** -- CTRL+Click on multiple adjacent fields to select them, then right-click the selection and select Group.
- **Create tabbed groups** -- CTRL+Click on two or more adjacent groups to select them, then right-click the selection and select Create Tabbed Group. You can rearrange and add additional groups by dragging and dropping them into the tabbed group.
- **Insert empty space items** -- placing these can add space between elements, which can add balance when you have an uneven number of fields next to each other.
- **Insert separator** -- this separates items with a solid line (good for creating a column effect).
- **Insert splitter** -- works like a separator, but it can be moved back and forth to increase/decrease the viewable area on each side (like a window shade).
- **Rearrange fields, groups, and tabbed groups** -- simply drag and drop items where you would like them to appear.

Tip: Save your changes often

Although the Customization menu offers an Undo button, it's a good idea to save your changes incrementally. That way, you can easily revert back to a previous layout after you test multiple changes. (It also protects you from losing you layout due to unexpected errors or crashes.)

Staff Manager

One of the best ways to unclutter the ILLiad client is by restricting access to the Borrowing, Lending, or Document Delivery modules entirely. This is helpful if you have Circulation staff, for example, that only need to see the Lending and/or Document Delivery modules. By removing "Read" privileges, staff will no longer see that module's Main tab group or its ribbon. Another essential feature of the Staff Manager allows you to share your own customized layouts with other staff. This is great because it allows you to completely customize your client from top to bottom and then push those same changes out to your staff. There are no files to save and share -- simply click the Copy Layout & Grid Settings button, set the From and To usernames, and you're done.

From the Staff Manager, you can also control whether or not your staff can further customize their own layouts. Because their individual changes will not affect other staff users, there is little harm in allowing them to make their own customizations. Plus, it gives them the flexibility to tailor the client to meet their individual needs. (The most common exception to this would likely be your student assistants, since they may accidentally stumble upon this feature without understanding how to use it or close it.)

More information

ILLiad documentation: Working with Client Layout and Design
https://prometheus.atlas-sys.com/display/illiad83/Working+with+Client+Layout+and+Design

ILLiad video tutorial: Custom Layouts
https://www.atlas-sys.com/training/tutorials/illiad8/illiad8v4/v8customlayouts.htm

Email Routing

What is it?

Email routing uses a combination of custom email templates in combination with transaction status changes to allow libraries to create their own customized processing actions.

How does it help?

Some ILL staff learn they can process unusual transactions that don't fit into the standard ILLiad workflow by manually changing statuses and sending email outside of the ILLiad client. But, these workarounds require extra time, tedious mouse clicking, cutting & pasting, etc. Email routing can help you reduce some of these workarounds through a custom procedure requiring only a few mouse clicks.

Getting started

Create your email template

Email templates are .txt files located in your \illiad\Email\ directory. By default, ILLiad uses specific templates for certain processes. A complete list of such templates can be found in the ILLiad documentation:
https://prometheus.atlas-sys.com/display/illiad83/Creating+and+Editing+Email+Templates.

You can include ILLiad transaction data in a template by inserting a field tag. Tags begin with <# and end with > (for example, <#PhotoJournalTitle> will insert the Journal Title into your email). You can use any field from the LocalInfo, Transaction, User, and Lender Addresses tables. These can also be used in the subject lines of your email routing.

> **Tip: Finding field names**
>
> Want to insert a field tag into your email, but you can't remember its exact name? The easiest way to find out is to pop open the Custom Request Search in the ILLiad Client. That will let you browse the Transaction, User, and Lender Addresses tables. For the LocalInfo table, just pull it up in the Customization Manager for easy access.

Use your template in an email routing

Logon to the ILLiad **Customization Manager**. Select **System**, then **Email**, and then click on the **EmailRouting** table.
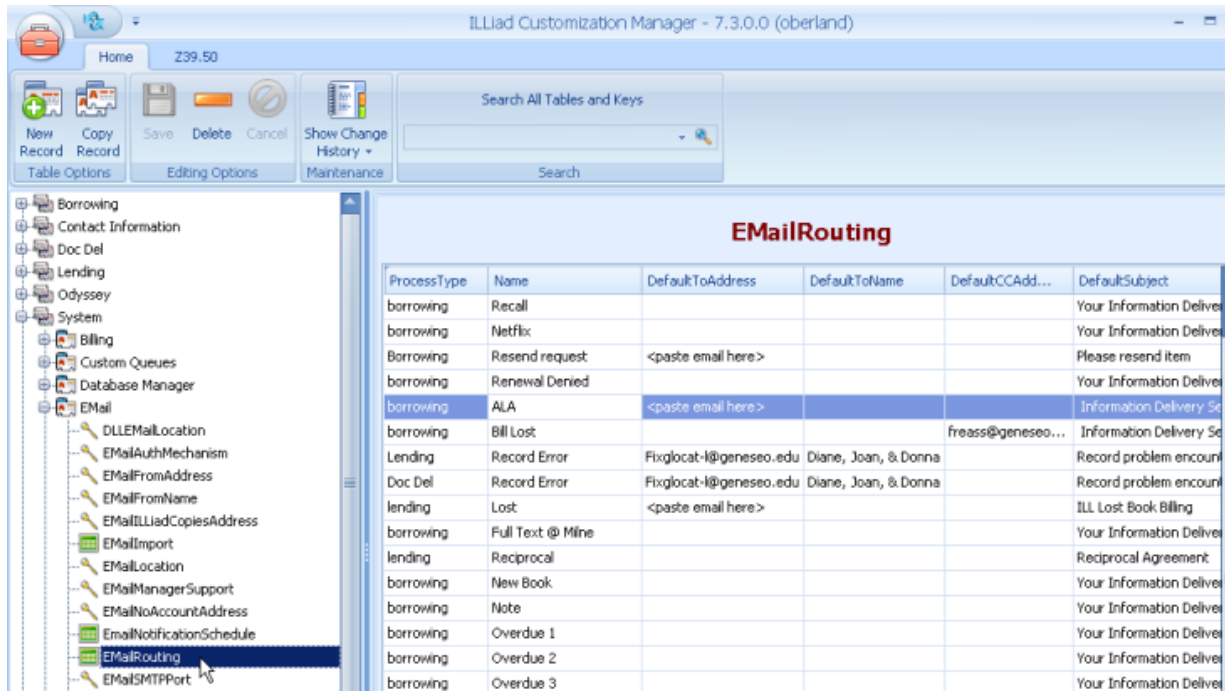
Click on the **New Record** button to create a new rule, or select an existing rule that you want to start from and click on the **Copy Record** button. Key elements are:
- **DefaultToName/Address**: This is the recipient of your email. Leave this blank and ILLiad will automatically supply the user's info (in borrowing & doc del) or library's info (in lending).
- **DefaultFromName/Address**: This is the return email address and name for your borrowing/lending/doc del contact person.
- **DefaultSubject:** This is the email subject and can contain the same field tags used in email templates.
- **DefaultStatus:** This is the status/queue to which ILLiad will move the transaction when the routing is executed. Leave this blank if you don't want to change the status.
- **FileNameLoan/Article**: The file name of your custom email template (remember the ".txt" extension).

Once you are finished creating or editing your email routing, save your changes. You will now be able to access them from the **Send Email** menu during request processing.

Examples

ALA ILL request:

This email routing can automate the process of sending ALA forms to libraries that are not OCLC lenders. Before sending the email, be sure to change the System ID to "OTH" and select your lender (in ILLiad 8, type in the symbol in the Lender field and click Save; you will then be prompted to enter or select a lender).

ProcessType	Borrowing
Name	ALA Request
DefaultToAddress	library@library.com
DefaultToName	Interlibrary Loan Office
DefaultCCAddress	
DefaultSubject	ALA Interlibrary Loan Request
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	Request Sent
FileNameLoan	ALAemail.txt
FileNameArticle	ALAemail.txt

Download the email template: http://goo.gl/UefJH

Ask patron a question

This is useful if you want to email a user about a request or citation without having to hand type information about the requested item. This email routing does not change the status of the request.

This email can be used in both Borrowing and Document Delivery -- just copy it and change the ProcessType to "Doc Del."

ProcessType	Borrowing
Name	Ask patron a question
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Question regarding your ILL request for "<#LoanTitle><#PhotoArticleTitle>"
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	Request Sent
FileNameLoan	AskPatron.txt
FileNameArticle	AskPatron.txt

Download email template: http://goo.gl/ewqTs

Bill patron for lost item

Use this to send an email to the patron, circulation staff, and/or the bursar to bill the patron for a lost book. You can also use this if you are going to block the user, as well.

ProcessType	Borrowing
Name	Bill Patron for Lost/Damaged Item
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Interlibrary Loan Replacement Charges for: <#LoanTitle>
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	Checked Out to Customer (or you can use a custom queue such as "Billed for Replacement")
FileNameLoan	BillLost.txt
FileNameArticle	BillLost.txt

Download the email template: http://goo.gl/43wMk

Cancelled after updating to 'Shipped'

Sometimes you accidentally update a lending request to 'Shipped,' only to discover that you can't send the item after all. Use this email routing to contact the borrowing library so they can request this again from other libraries.

ProcessType	Lending
Name	Cancelled after updating to shipped
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Cannot supply OCLC ILL #<#ILLNumber>
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	Cancelled by ILL Staff
FileNameLoan	CancelAfterShipped.txt
FileNameArticle	CancelAfterShipped.txt

Download email template: http://goo.gl/NKl8F

Invoice library for long overdue item

Send a borrowing library an invoice for long overdue or damaged items. Use a custom search to retrieve items 90 (or more) days overdue, then use this email routing to quickly send an invoice to each borrowing library.

ProcessType	Lending
Name	Invoice library for lost/damaged item
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Interlibrary Loan Replacement Charges for ILL#<#ILLNumber>
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	Item Shipped (or you can use a custom queue such as "Billed for Replacement")
FileNameLoan	LendingInvoice.txt
FileNameArticle	LendingInvoice.txt

Download email template: http://goo.gl/XgE4P

Item available on the Web

Send a user the URL for viewing his or her requested item on the web. After the email is sent, the transaction status automatically changes to Request Finished. (If you'd like to track statistics for these types of requests, place "WEB" in the lender string.) This is particularly useful for Google Books and Internet Archive resources, as well as Open Access journals.

ProcessType	Borrowing
Name	Item available on the Web
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Available online: <#LoanTitle><#PhotoArticleTitle>
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	Request Finished
FileNameLoan	FullTextWeb.txt
FileNameArticle	FullTextWeb.txt

Download the email template: http://goo.gl/a3nVo

Lender please update to 'Shipped'

Use this for requests flagged as 'Received Not Allowed Here' that still have an OCLC status of 'In Process'. This will contact the lending library and ask them to update the OCLC record to 'Shipped' so you can update it to 'Received'.

Be sure to look up the lender's email address in your Lender Addresses or the Policies Directory, then copy and paste it into the 'To:' line of the email.

ProcessType	Borrowing
Name	Lender Update to Shipped
DefaultToAddress	library@college.edu
DefaultToName	Interlibrary Loan Office
DefaultCCAddress	
DefaultSubject	Please update ILL #<#ILLNumber> to 'Shipped'
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	
FileNameLoan	UpdateShipped.txt
FileNameArticle	UpdateShipped.txt

Download the email template: http://goo.gl/u3cjU

Lender resend request

Use this to email a lender and ask them to resend an article or loan. Note: You have to copy the lender's email from the OCLC policies directory or ILLiad addresses, and paste it into the email popup.

ProcessType	Borrowing
Name	Lender Resend Request
DefaultToAddress	library@college.edu
DefaultToName	Interlibrary Loan Office
DefaultCCAddress	
DefaultSubject	Please resend ILL #<#ILLNumber>
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	Request Sent
FileNameLoan	ResendRequest.txt
FileNameArticle	ResendRequest.txt

Download email template: http://goo.gl/lkj2D

Renewal denied notice

Easily send a renewal denied email notice when the lending library refuses a renewal request, and automatically change the status of the request to Checked Out to Customer. Before sending, add the new due date to ILLiad's due date, save your changes, and the email will show the revised date.

ProcessType	Borrowing
Name	Renewal Denied
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	No renewal -- please return by <#DueDate>: <#LoanTitle>
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	Checked Out to Customer
FileNameLoan	RenewalDenied.txt
FileNameArticle	RenewalDenied.txt

Download email template: http://goo.gl/uXWoa

Renewal OK notice

Easily send a renewal OK email notice when the lending library grants a renewal request, and automatically change the status of the request to Checked Out to Customer. Before sending, add the new due date to ILLiad's due date, save your changes, and the email will show the revised date.

ProcessType	Borrowing
Name	Renewal OK
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Renewed until <#DueDate>: <#LoanTitle>
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	Checked Out to Customer
FileNameLoan	RenewalOK.txt
FileNameArticle	RenewalOK.txt

Download email template: http://goo.gl/ZbtbY

Report catalog record error to Technical Services

Send reports about errors in OCLC holdings or catalog records to cataloging or other staff. Try using a listserv to send an email to multiple people who need the notification.

This is useful for Borrowing, Lending, and Document Delivery. Simply copy the email routing and change the ProcessType to "Lending" and "Doc Del" respectively.

ProcessType	Borrowing
Name	Report catalog record error
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Record problem encountered while processing an ILL Request
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	
FileNameLoan	ReportCatError.txt
FileNameArticle	ReportCatError.txt

Download email template: http://goo.gl/lgKpy

Report link resolver issue to Technical Services

Link to an e-journal article not working? Send reports about link resolver issues to serials or other staff. Try using a listserv to send an email to multiple people who need the notification.

This is also useful for Document Delivery and Borrowing. Simply copy the email routing and change the ProcessType to "Doc Del" and "Borrowing" respectively.

ProcessType	Lending
Name	Report link resolver issue
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Link resolver issue encountered while processing an ILL Request
DefaultFromAddress	(Your department contact's email)
DefaultFromName	(Your department contact's name)
DefaultStatus	
FileNameLoan	ReportLinkError.txt
FileNameArticle	ReportLinkError.txt

Download email template: http://goo.gl/NvnQ4

Network Scanning

What is it?

Network scanning is where you have your scanner configured to send files over the network to a computer. The folder where the scans are received is then shared so it is accessible from other computers on the network.

How does it help?

Network scanning helps because it eliminates the need to transport files from one machine to another in order to send them through Odyssey.

Getting started

If you have a stand-alone scanner (usually also a copier), you will probably need to ask IT for help. Otherwise, check the manual for the specific device. If you have a smaller scanner, you only need to share the folder where the scans are stored. Note: it is important to use the same drive letter when mapping the network drive from additional computers to the folder with scans. See the following screen shot for a visual explanation.
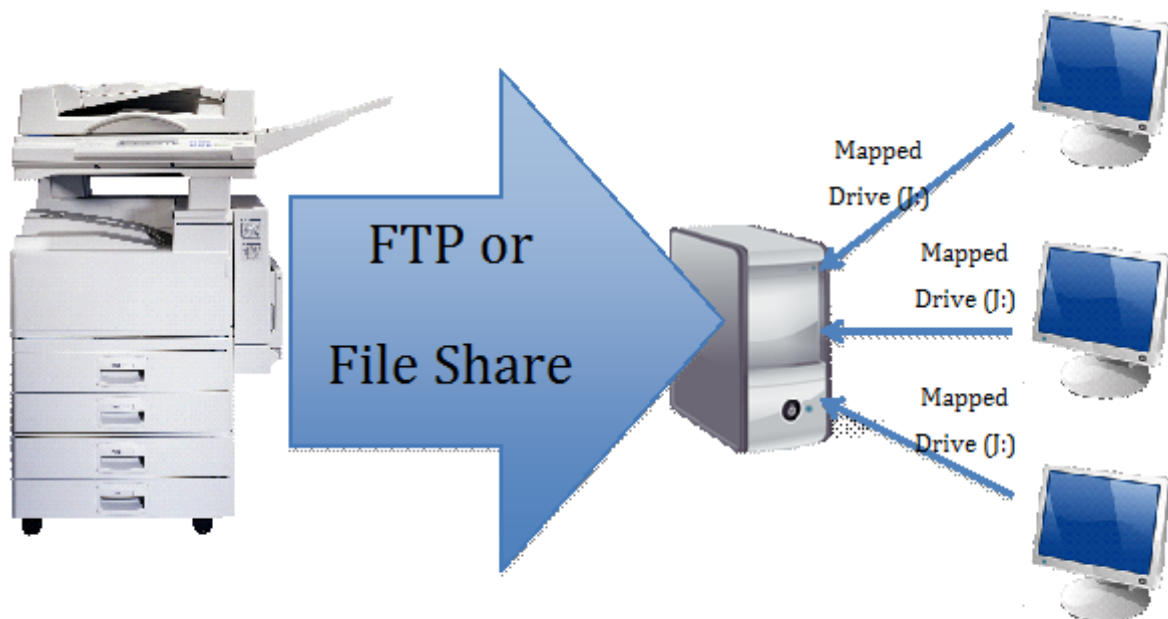
Remember:
- The mapped drive needs to be the same letter on all computers.
- Remember to use the ILLiad transaction number as the file name when scanning.
- These options are usually turned off by default.

Odyssey Helper

What is it?

Odyssey Helper is an ILLiad module that batch processes scanned articles for document delivery and lending. By sending all your scanned articles in a network folder, you can batch the uploading and updating process for all your document delivery and lending.

How does it help?

Reduces the work of handling scanned requests individually, saving your staff a great deal of time and speeding up your article request processing. This simple application can save a great deal of time compared to manually updating and sending individual requests.

Getting Started

Tell Odyssey Helper where to find your documents

If you network the folder where the Odyssey Helper is looking for the .TIF files, you must be sure that your **Customization Manager** has the following settings:

1. Select **Odyssey**, then click on **Defaults**.
2. Click on **OdysseyHelperImagesPathLending** and change the Key Value to the network folder directory that you save your scans. Then save your changes.
3. Click on **OdysseyHelperImagesPathDocDel** and change the Key Value to the network folder directory that you save your scans. Then save your changes.
4. To send articles, finish your scanning and click open Odyssey Helper. Logon using your ILLiad client username and password.

All of the requests with the status of In Stacks Searching that can be sent via Odyssey should appear. Click on Send; Odyssey Helper updates the articles as they are sent. Click on OK for the Sending Complete popup that appears.

> **Tip: What to do when sending fails**
>
> If for some reason an article fails to send, go to the ILLiad lending ribbon and click on Odyssey Scanning. Scan in the TN, Import your image, and send the document. If it still does not go through, then there may be a problem with the receiving library's ILLiad server. At that point, consider sending the file via Article Exchange or email.
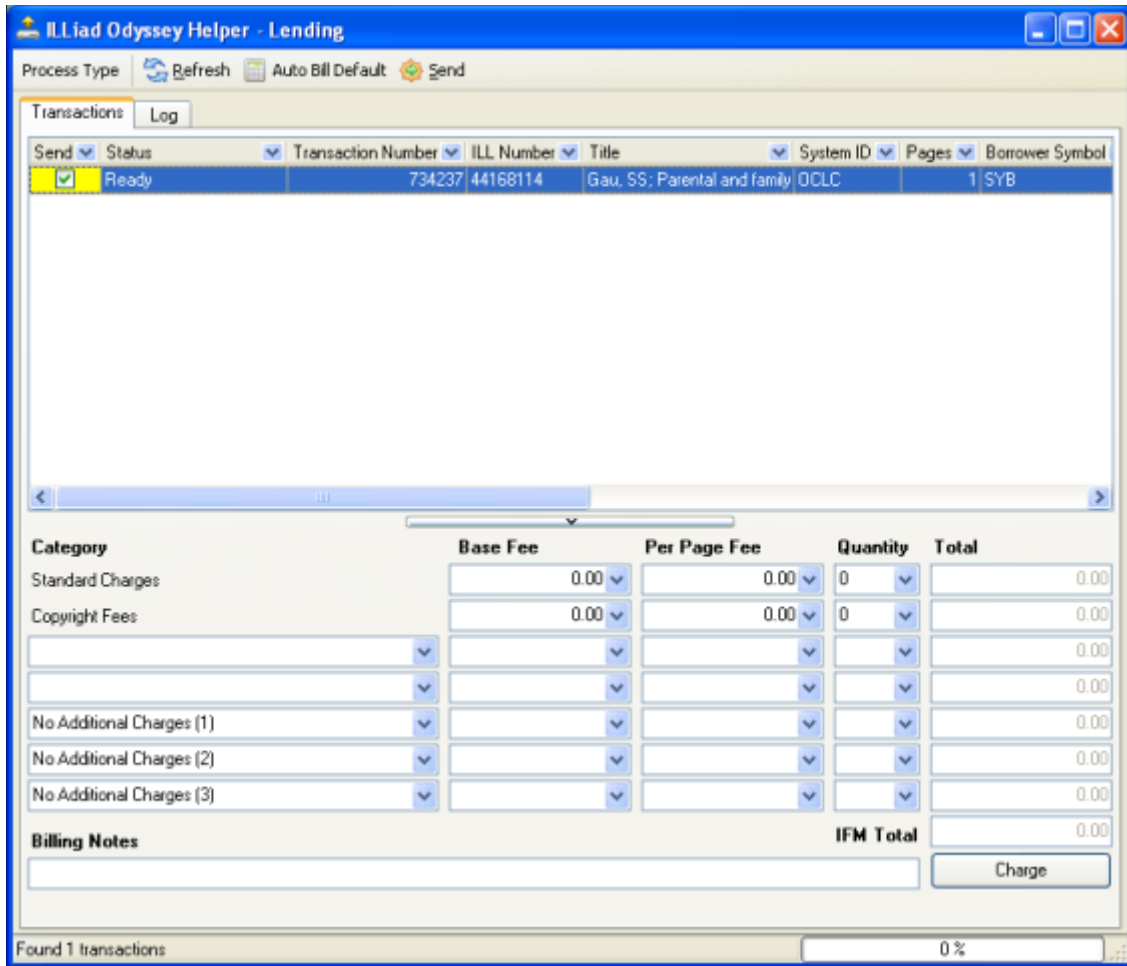
One of the perks of Odyssey Helper is that it will automatically apply billing charges when needed. In the Lending process type, just click on the **Auto Bill Default** button before delivering the articles.

By default, Odyssey Helper stores its sent files in a Backup folder (found within the OdysseyHelperImagesPath directories). Keep an eye on this because it can begin to take up a lot of storage space. To easily empty this periodically, simply click on the **Empty Backup Folder** button. Try doing this once a week.

Print Templates

What is it?

ILLiad uses a series of customizable word documents as templates (usually located in the Print folder on the ILLiad server) that create receiving, paging, and shipping labels using merged ILLiad data (produced from the ILLiad client during print transactions and saved as .dbf (database files) in C:\ILLiad\Print). Beginning with ILLiad 8, these .dbf files are Excel spreadsheets.

How does it help?

When properly managed, one set of print templates can be used by all ILL workstations, and paper form data can be formatted to fit the needs of staff using forms to process requests.

Getting started

Sorting and printing templates in ILLiad 8

Beginning with ILLiad 8, printer templates are now sorted from within the client itself–not each individual template. You can specify how to sort each template when prompted by ILLiad during printing. You only need to configure this once. The following are recommended sort settings:

ILLiad 8.0-8.0.12
- BorrowingLoanSlips: TRANSACT_2
- BorrowingReturnSlips: TRANSACT_2

ILLiad 8.1+
- BorrowingLoanSlips: Transactions_TransactionDate
- BorrowingReturnSlips: Transactions_TransactionDate

For quicker printing, it is highly recommended that you do not choose to view the templates prior to printing. Viewing the templates can cause PC slowdowns on older machines and Microsoft Word will occasionally turn unresponsive for a minute or so. For one-click printing (highly recommended), you can also choose not to be prompted each time you want to print.

Upgrading your customized templates for ILLiad 8.1+

8.1 templates offer a more expansive use of data within the customized form. The newer templates use data merged from Excel spreadsheets versus .dbf files. If you have customized your print templates, you will need to change the source from LegacyQueue$ to PrintQueue$ and reassign field names.

Transitioning to the new templates offer libraries the ability to add to forms a borrowing department or lending department email address. Also, several templates now offer the ability to merge and display data from other modules (example – adding the Lending Library's address to a Borrowing label). To make the conversion, do the following for each template that you use:

1. Find your templates. Not sure where they are? In the Customization Manager pull up: **System|General|PrintDocumentsPath**
2. Make a back up copy of your print folder or specific templates *before* editing.
3. Designate to work on a template you've customized. (Example: LendingArticleSlips)
4. Rename the original in the Print folder (to perhaps: LendingArticlesSlipsOriginal) before placing your customized template into the folder.
5. Copy and paste your original customized template into the Print folder.
6. Now open your customized Template. If you receive a message below, please note that the newer templates run on "PrintQueue$" not "LegacyQueue$". Answer 'No'. [Your print template should open].
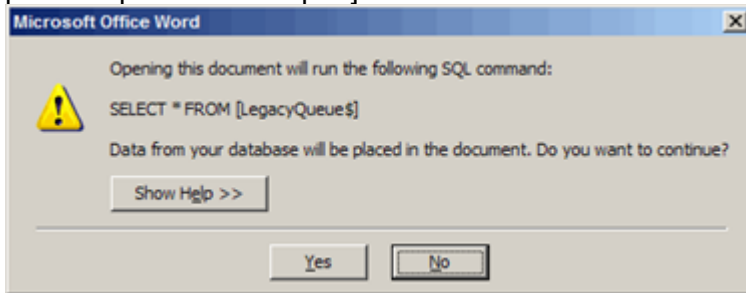
7. In Word click on the Mailings tab.
8. Locate the **Select Recipients|Use Existing List**
9. Now you will be locating and matching the corresponding Data File (or .xls file) to the Word template. Please refer to the Atlas link for matching templates with Data Files: https://prometheus.atlas-sys.com/display/illiad/Customizing+Printer+Templates
10. Navigate to the corresponding file located in your **C:\Program Files\ILLiad\Print** folder (on 64-bit machines, it's C:\Program Files (x86)\ILLiad\Print). The corresponding file for LendingArticleSlips is StacksP.xls
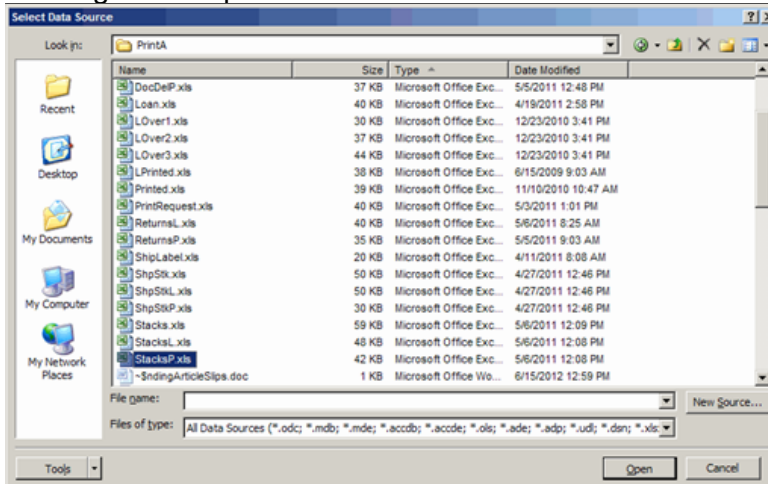
11. Now, select **PrintQueue$** and click OK
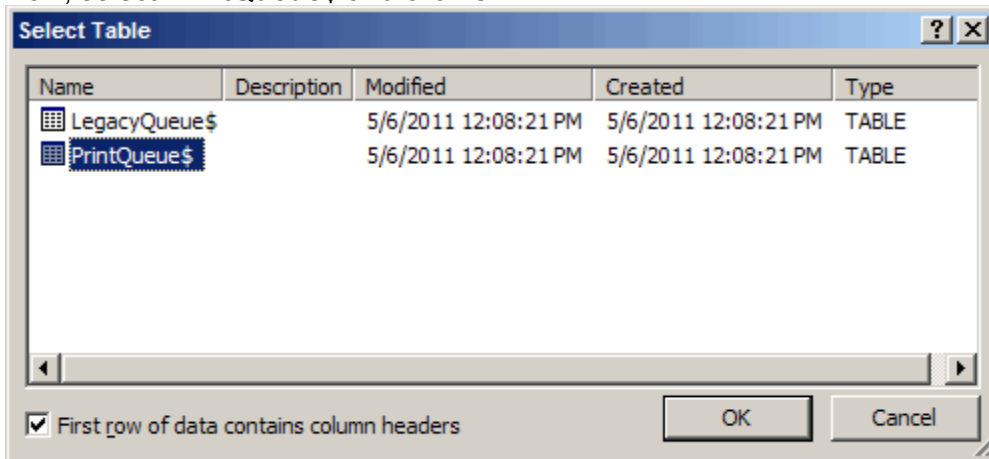
12. Your template will come up with the old **LegacyQueue$** data (ex. <<Transactio>>)
13. Begin changing the fields by:
    a. Highlighting an old field name. **Don't forget!** If you have toggle codes ("if" and "then" merge fields), highlight the area where they reside and <right click> and select <Toggle Field Codes> to reveal the codes needing to be changed.
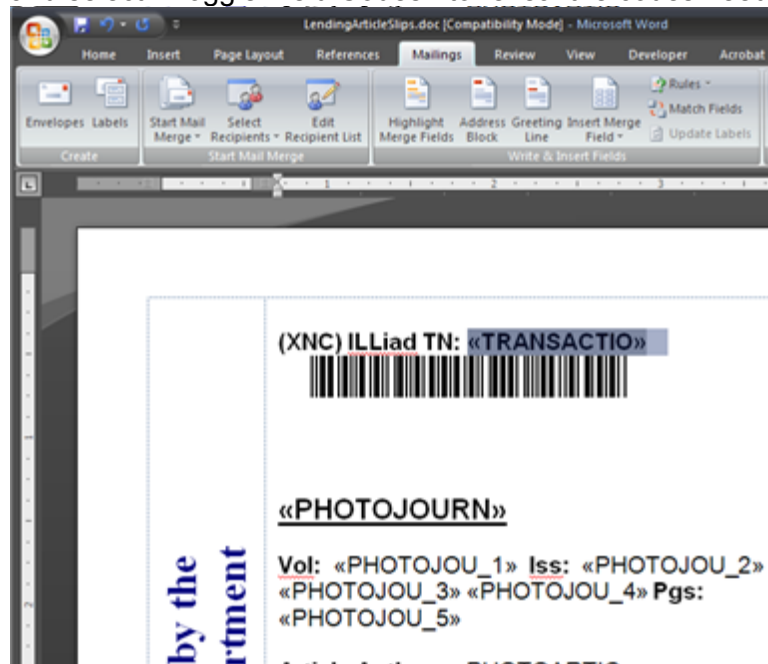
b. Select **Insert Merge Field** and select the corresponding field name. In this case Transactions_TransactionNumber
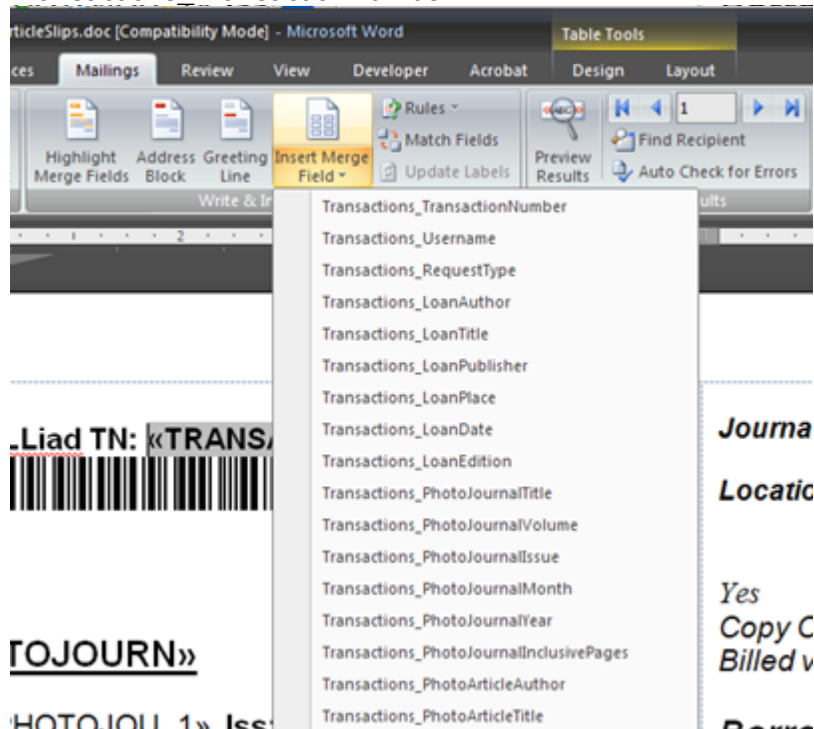
14. **Save** after you've finished renaming all of the fields.

Tip: Getting your barcodes to print

Barcode field not working? In plain text it should be input as:

«Transactions_TransactionNumber»

Then convert that entire string to the 3 of 9 barcode font.

Sample print templates

The following templates are for use with ILLiad 8.1 and above, as they are linked to the Print Queue for each Excel data source. (If running a 32-bit PC, you may be prompted to locate the Excel file. If so, your templates are stored in C:\Program Files\ILLiad\Print\).

BorrowingArticleLabels

This is used as a simple cover sheet for articles that are not delivered electronically. Because such articles are often picked up from a service desk, these cover sheets feature the patron's name prominently at the top. No barcode is included since such articles will already be in the status of Request Finished.

Interlibrary Loan Article   **Milne Library**

Bowersox, Timothy

IDS Transaction Number: 941208

Article Information

Title: "Typical and atypical neuroleptics"

Author: Gershanik, Oscar S

Journal: Handbook of clinical neurology.

Volume: 100   Issue: Date: 2011

Questions or comments?

Contact Information Delivery Services at:

- 585-245-5589
- ids@geneseo.edu
- Or drop by our office in Milne 208

Download print template: http://goo.gl/FzZpG

BorrowingLoanSlips

These slips are used for received borrowing loans. Folded in half, the left side contains information for the patron and the right side contains ILL office information (including a mailing label for "Mail to Address" patrons).

Interlibrary Loan Item	Milne Library - ILL
Bowersox, Tim	Hold for Pickup
Transaction Number:	ILL Number:
‖‖‖‖‖‖‖‖‖‖‖ 929062	‖‖‖‖‖‖‖‖‖‖‖ 86651496
Due Date: **2/28/2012**	Due Date: **2/28/2012** Return to: **XYZ**
Social welfare : politics and public policy /	**Milne Library, SUNY Geneseo (YGM)**
To renew this item, either:	Information Delivery Services
• Visit http://illiad.lib.geneseo.edu	1 College Circle
• Call us at 585-245-5589	Geneseo, NY 14454
• Email us at ids@geneseo.edu	585-245-5589
• Or drop by our office in Milne Library	ids@geneseo.edu
Please return this to the Circulation Desk or ILL Office.	**Title:** Social welfare : politics and public policy /
Keep with this slip for faster check-in.	**Author:** DiNitto, Diana M.
ILL Billing Policy	**Pieces:** 1
[Your ILL billing policy goes here. You can also add other useful info and links.]	
Item Information	
Title: Social welfare : politics and public policy /	
Author: DiNitto, Diana M.	
Pieces: 1	

Download print template: http://goo.gl/ff9fw

BorrowingReturnSlips

Each ⅓ sheet slip contains a return label at the bottom. If needed, just cut it off and affix it to your packaging for easier mailing.

FNN

ILL: |||||||||||||||||||||||||||

YGM TN: 896173
SUNY Geneseo Interlibrary Loan

Thank you for loaning us the following item:

Title: Haunted by history /
Author: Anim-Addo, Joan.

OCLC#: 896173
ILL#: 81341839
Pieces: 1
Due Date: 12/22/2011

Questions or comments? 585-245-5589 or
ids@geneseo.edu

SPECIAL INSTRUCTIONS:

(Cut Here)
From:
Information Delivery Services
1 College Circle
Geneseo, NY 14454

Ship to:
Nova Southeastern University
Alvin Sherman Library, Research, and Information
Technology Center
Interlibrary Loan Department
Room 3065
3100 Ray Ferrero, Jr., Boulevard Ft. Lauderdale FL
33314-7796

Download print template: http://goo.gl/Q61G7

DocDelArticleSlips

These ⅓ sheet slips are designed to provide the most useful information for stacks searching, without using too much paper.

ILL Transaction Number:	**DOCUMENT DELIVERY – ARTICLE**
																				945502	

Delivery Preference: Electronic

Location: Fraser
Nuclear instruments and methods in physics research
Volume: **201** | Issue: **2-3**
Year: **1982**

Article Information
Anomalous track development in CR-39:
Effects of gamma irradiation
Author: Blatchley, C.C.
Pages: 535-537

User Information
Name: Doe, Jane
Username: jd1
Department: Physics (Undergraduate)

Delivered By
Information Delivery Services, Milne Library
Phone: 585-245-5589
Email: ids@geneseo.edu

ILL Transaction Number:	**DOCUMENT DELIVERY – ARTICLE**
																				945526	

Delivery Preference: Electronic

Location: Fraser
Plant cell reports
Volume: **15**
Year: **1996**

Article Information
A reliable method for extraction of RNA from
various conifer tissues
Author: Jin-Zhuo Dong and David I. Dunstan
Pages: 516-521

User Information
Name: Claus, Santa
Username: Claus
Department: Climatology (Faculty)

Delivered By
Information Delivery Services, Milne Library
Phone: 585-245-5589
Email: ids@geneseo.edu

Download print template: http://goo.gl/2ypeB

DocDelLoanLabels

These ⅓ sheet slips are designed to provide the most useful information for stacks searching, without using too much paper. A convenient mailing label will appear at the bottom of each slip if the patron is set to Mail to Address.

Download print template: http://goo.gl/QiWo3

LendingArticleSlips

These ⅓ sheet slips are designed to provide the most useful information for stacks searching, without using too much paper.

Download print templates: http://goo.gl/UP2Vc

LendingLoanLabels

Each ⅓ sheet slip contains a mailing label at the bottom. If needed, just cut it off and affix it to your packaging for easier mailing.

Download print template: http://goo.gl/WCIVN

Shared Servers and NVTGC

What is it?

Shared servers are helpful if you have multiple libraries on one campus lumped under just one OCLC symbol (such as a Science Library). This type of setup is worth exploring if, for example, you have multiple delivery locations on campus, but one central ILL department.

How does it help?

Shared servers allow institutions with multiple branch libraries to share an instance of ILLiad. This provides each individual library's patrons to identify which location they want to pick up their deliveries. It also allows staff at each library the ability to process their own requests from their own patrons and collections.

Getting Started

Dave Williams (University of Notre Dame) has contributed some documentation that will help you set up multiple NVTGC codes in a shared server environment (i.e. one OCLC symbol).

Non-shared server (Notre Dame Main Library + their Delivery Locations)

The following will address how they are handled in two environments: non-shared server AND in a shared server environment. (We can speak of this, because a little over a year ago, Notre Dame went from a non-shared server environment to a shared server environment and we got to learn the difference in how they work in these two different environments.)

There seems to be two types of NVTCG codes: (1) Main Institutional and (2) Delivery Locations.
1. Our NVTGC code is our institutional code, IND.
2. When signing up for an ILL account via the ILL online registration page, user can select a delivery location (for us, tends to be a branch):
3. ILL = ILL Office (synonymous with Main Library);
4. ARCH = Architecture Branch;
5. MATH = Math Branch;
6. Etc.

Server processing

BORROWING requests from our users come get processed and are based on their Delivery Location NVTGC value. For example, we have routing rules that place ARCH requests into a special Architecture Branch Queue.

** If user didn't select a Delivery Location NVTGC value, by default user is assigned the ILL value. (For some reason, there was an issue of making it a required field, which I don't recall now.) This becomes important when we switched to a shared server environment**

ILLiad web forms

On the "NewUserRegistration.html" form (online registration for new users), these DELIVERY LOCATIONS options are coded under <#PARAM> tag and selecting a delivery location

somehow links user to IND. Using the form, users who don't select a delivery location (and therefore, an NVGTC value) by default will be assigned the NVTGC value of ILL (main ILL office), not IND (the institutional code). These sub-library delivery locations are all within the institutional umbrella of the NVTGC code of IND (Notre Dame).

Shared server (two institutions)

In this setup, each institution has their own unique institutional code: IND (Main Library + Branches) and XND (Law Library).

Why switch to a shared server?

Though they are under another administrative entity, the Notre Dame Law Library wanted to use the ILLiad system to manage ILL requests. Given our association and relationship with the Law Library, it made sense for us to SHARE resources and costs, rather than have the Law Library purchase a separate license and contract.

Server processing

With the two types of users sharing the same server – (1) Notre Dame "Main Library + Branches" and (2) Notre Dame Library Users – borrowing request are kept separate. Staffs from the two institutions do not see each others' requests, because they are filtered based on the institutional NVTGC Value (IND or XND) **EXCEPT that the NVTGC code "ILL" (in a shared server environment) became a DEFUNCT, Non Usable NVTGC value. When we switched to a shared server, requests from users with NVGTC value of "ILL" were no longer being filtering into the Notre Dame Main Library, but were "lost"; we had to contact Atlas Systems (we are hosted) who changed any user with the NVGTC value of ILL to IND. The NVGTC code then became a dual purpose: institutional and delivery location for the ILL main office.**

ILLiad web forms

Therefore you will need to edit the User Registration forms and update the default delivery location. The "NewUserRegistration.html" form (<#PARAM> of ILL (main ILL office)) needs to be changed from "ILL" to "IND." This ensures that patron who didn't select a delivery location during registration have their request filtered to the changed NVGTC code (in our case, IND) rather than filtered to the now defunct ILL code.

This is important, if you don't want your users to have their request get lost in the system. Since we are hosted, OCLC Support handles most of this sort of configuration via scripts, but sometimes, things can fall through the cracks. It did for us. Here is how the code was updated:

```
<label for="NVTGC">

<span class="field">

<span class="req">*</span>

<span class="<#ERROR name="ERRORNVTGC">">

<b>Delivery Location</b></span>

<br />
```

```
<span class="note">When you choose Hesburgh Library IND will display</span>

</span>

<select id="NVTGC" name="NVTGC" size="1" class="f-name" tabindex="4">

<option value="<#PARAM name="NVTGC">" selected><#PARAM name="NVTGC"></option>

<option value="IND">IND/Hesburgh Library</option>

<option value="ARCH">Architecture Library</option>

<option value="BIC">Business Information Center</option>

<option value="CPL">Chem/Physics Library</option>

<option value="ENG">Engineering Library</option>

<option value="KKIC">Kellog/Kroc Information Center</option>

<option value="MATH">Mathematics Library</option>

</select><br />

</label>
```

Staff Manager

In the shared server configuration, each ILLiad user account must be assigned an Institutional NVGTC code (Called "Site") when their user account is created. By doing this, when the user logs onto the ILLiad client, the user only sees the requests that pertain to their institution.

You can assign a user with a "Site" of "ALL", but this has implications for using the Customization Manager. (This is a non-issue in a non-shared environment)

Customization Manager

When you log into the customization manager, you have to select the SITE where you are working (see attached image). Since I make changes or create routing rules in the IND site, I select the IND code. (This is a non-issue prior in a non-shared environment.)

More information

ILLiad documentation for Shared Server Support

https://prometheus.atlas-sys.com/display/illiad83/Shared+Server+Support

Stale Request Processing

What is it?

Lending, Borrowing, and even Document Delivery can have stale requests that settle for days, weeks, months, even years without ever being filled or finished, because requests remain dormant in a status unless acted upon by OCLC's updates or processing. Checking Stale requests are critical to clearing up problems before they become big problems.

How does it help?

This means no more dormant requests that users wonder why were not filled, or submit duplicate requests for. Stale requests, if long unchecked will once filled, make your turnaround times suffer.

Getting started

Once every week, open the relevant queues (it helps to have a well-trained student do this):
- Borrowing: Request Sent
- Lending: Item Shipped; In Stacks Searching; Awaiting Odyssey Scanning
- Doc Del: In DD Stacks Searching; Awaiting DocDel Scanning

After opening the queue, a list usually pops up (for some queues, you have to open the status from the check box in the Edit Request screen). The queue's list is sorted by transaction number (by default), so the first one is the oldest. Open the oldest Request.

For borrowing and lending requests, check the OCLC Status (if "Record not found", the OCLC ILL request was deleted after expiration). For Document Delivery, the stale requests typically are dated past your average turnaround time. Note: if unsure, check the tracking (click on the History tab within the request).

Next, check the Need by Date (and Transaction Date), if still valid, you can resubmit the request with new lenders. If it's past the Need by Date, cancel the request (if a lot of time has passed you may not want to send an email to the user).

Continue down the list until the OCLC Status of requests is consistently active and shipped, received, etc.

More information

ILLiad documentation: Processing Borrowing OCLC Special Messages

https://prometheus.atlas-sys.com/display/illiad83/
Processing+Borrowing+OCLC+Special+Messages

ILLiad documentation: Processing Lending OCLC Special Messages

https://prometheus.atlas-sys.com/display/illiad83/
Processing+Lending+OCLC+Special+Messages

OCLC WCRS User Guide: Special Messages

http://www.oclc.org/us/en/support/documentation/resourcesharing/using/userguide/
special_messages/special_messages.htm

System Alerts

What is it?

You can follow up with errors in ILLiad 8 by checking the System box for red stop signs on the lower right hand corner of the screen. Possible problems in Borrowing include:
- Connection Manager Errors
- Flagged Requests
- Outgoing Email
- Odyssey Sending Errors
- Unmatched Odyssey Items

How does it help?

By looking at these errors, you can make sure requests have been updated correctly in OCLC and ILLiad and that all transactions are moving through the system as they should be. It also ensures that emails and Odyssey documents are properly sent and received without long delays.

Connection Manager and Flagged Requests

Connection Manager

The ILLiad Connection Manager is what keeps your ILLiad transactions in sync with their OCLC requests in the WorldShare system. Occasionally, if ILLiad tries to update an OCLC status in error (for example, trying to mark a request "Received" if it has not yet been "Shipped") then you will receive an alert in the System group.

Other errors may occur that are very specific to your server -- for instance, you may see DOM Tree errors or other such statuses. Consult your systems administrator or OCLC support to determine if these are issues related to your server hardware, software, or firewall.

To clear these errors, double click on the Connection Manager row in the System group. You will then be displayed a list of affected requests, grouped by error type. You can clear errors individually by opening a request, or you can clear errors in batch by selecting multiple requests and clicking the "**Clear Selected Errors**" button.
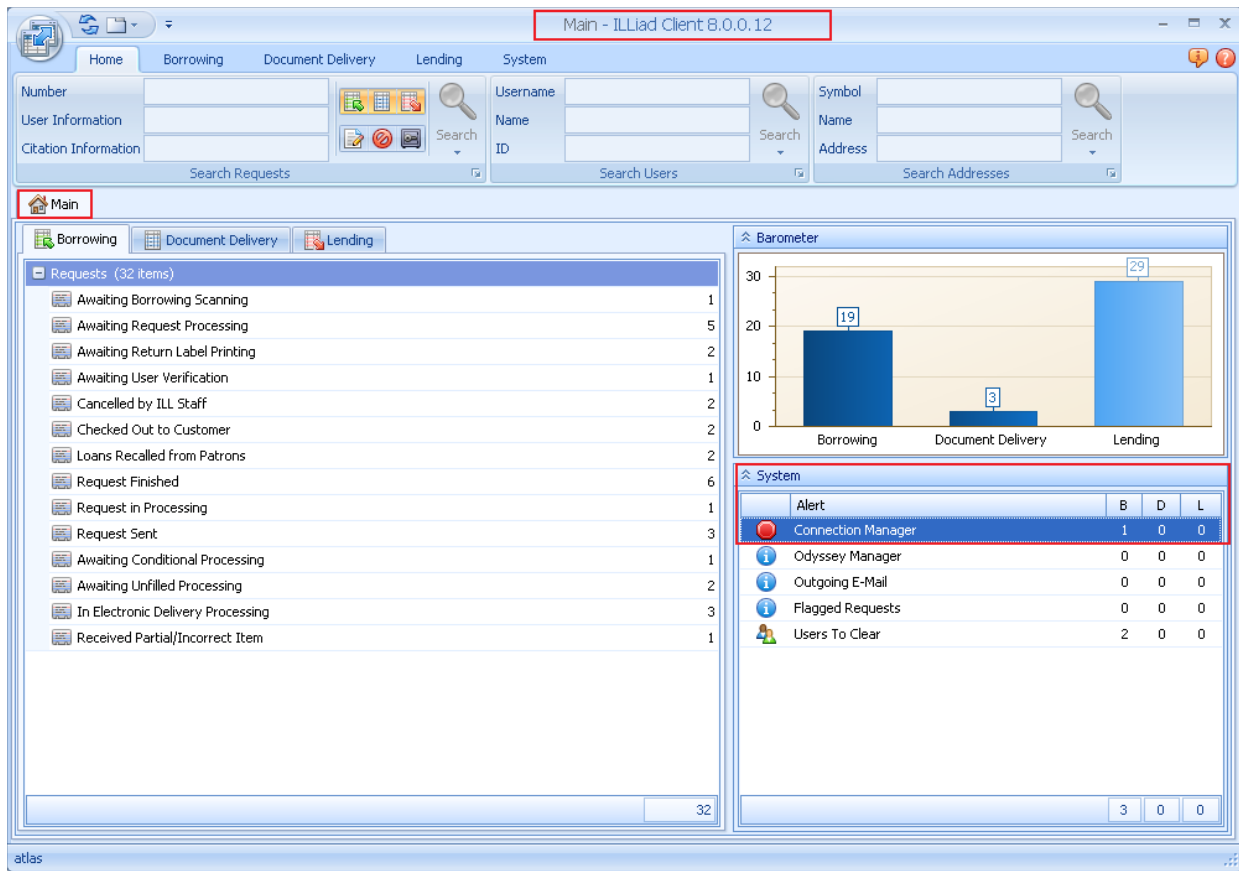
In the table below, you will find common errors and how to resolve them.

Error	What it means	How to fix it
Record Not Found	You tried to update an OCLC request that no longer exists.	There's not much you can do about these and they are typically harmless. Make quick work of these by selecting them (SHIFT+Click) and clicking the Clear Selected Errors button.
Received Not Allowed Here	You tried to update an OCLC request to "Received" that was not in the "Shipped" status.	Use an email routing to ask the library to update the request to Shipped in OCLC. Keep an eye on these, as you will need to delete the OCLC request if it ages to the next lender. Only clear the error once the request is resolved or you'll lose track of it.

| Renewal Not Allowed Here | You tried to request a renewal when the OCLC request was not in the "Received" or "Renewal OK" status. | This typically means the library already denied renewals, or recalled the item.

Occasionally, this occurs if you tried to renew an item that had already been returned or not properly updated to Received.

Either way, the only way to resolve this is to request a new copy of the item from another lender, or try to negotiate a new due date outside of WorldShare. |
|---|---|---|
| Complete Not Allowed Here | You tried to update a lending request to "Complete" when it was not in the "Returned" or "Recalled" status. | You can either recall the item and then update it to complete, or contact the library and ask them to properly update the request to Returned. |
| Update Error | These tend to occur if the Connection Manager times out twice while trying to update a request. | In many instances, these errors are already corrected by the time you view the request.

However, it may require you to try to manually update the OCLC status yourself. Because many of these are caused by temporary issues, this usually works. |
| Alert | This indicates that the other library sent you an alert message through OCLC. | These alerts appear in the Notes field. Sometimes action is required so respond accordingly before clearing the error. |

Flagged Requests

Flagged requests occur specifically when ILLiad receives multiple "Shipped" messages from OCLC for the same transaction. This often occurs when a library lets a request age to the next lender, but both libraries end up shipping the item.

For article requests, the easiest thing to do is to clear the error -- no harm is done since you don't have to return any items to the lending libraries.

For loan requests, however, you need to be careful. Because ILLiad lists the Lending Library as the one who first updated the request to Shipped, you need to pay attention to which library's book you receive first. Otherwise, you risk sending the book back to the wrong library.

Once you spot a flagged loan request, you may want to consider changing the Lending Library to a custom address called "CHECK BOOK" before clearing the flag. You can then put a message in the address fields of the Lender Address record, such as "Check paperwork

for proper owner. Update Lending Library with correct symbol." This is an easy way to flag the request for your staff (often student assistants) so they do not check the book in without selecting the right lender.

Outgoing Email

These errors are usually straightforward and are caused when you send an email to an invalid email address. (For example, a user incorrectly puts ",edu" instead of ".edu" at the end of their address; or the email address line is so long it gets truncated.) All you typically need to do is change the "To" line so that the email address is properly displayed. Then simply resend the email. (If a typo caused the error, you may also want to update the user or library's email address so that it does not happen again.)

Errors can also occur if ILLiad is unable to send emails, either because your SMTP server is down or your email credentials and ports are not properly configured in the Customization Manager. If this is the case, double check the following Customization Manager keys for accuracy (all located under the System | Email group):
- **EMailSMTPPort** (i.e. 25)
- **EMailSMTPServer** (i.e smtp.college.edu)
- **SMTPPassword** (your email password)
- **SMTPUserID** (your email username)

If these values are correct and you are still receiving SMTP errors, consult your systems administrator or OCLC support.

Odyssey Manager and Unmatched Odyssey Documents

Odyssey Manager

As with Outgoing Email alerts, the Odyssey Manager indicates problems with your outgoing Odyssey documents. In many cases, the problem arises when Odyssey is unable to connect to the recipient's server -- either due to a bad IP address in the library's lender address record or possible server issues.

To rule out possible IP address issues, open the request and check what's listed in your Lender Address record with what's listed in the Imported Request and/or the OCLC Policies Directory. If your IP address on record is correct, then you now need to rule out possible server issues on *your* end.

This is easier than it sounds, as you likely would have encountered numerous Sending Failed errors already. Click on the Log tab in the Odyssey manager window just to double check for specific errors. If these are errors related to your server, contact your systems administrator or OCLC support.

If things are clean on your server, then the best thing to do is send the article to the borrowing library by alternative means -- either an email routing that points to the PDF on your server, or use Article Exchange.

Unmatched Odyssey Documents

These alerts appear if Odyssey receives documents, but cannot match them to an ILLiad transaction or a lending library. Double-clicking the Unmatched Odyssey Documents row opens the Electronic Delivery window, at which point you can assign the document to the proper ILLiad transaction and/or lending library.

More Information

ILLiad documentation: System Logs and Alerts

https://prometheus.atlas-sys.com/display/illiad83/System+Logs+and+Alerts

Working with Library Groups

What is it?

ILLiad allows you to group lenders together for statistical purposes. Based upon these groups, routing rules can also be set up to import lending requests into separate group queues (example: Awaiting IDS Request Processing, Awaiting Charge Processing, Awaiting Reciprocal Lender Request Processing)

How does it help?

By setting up Groups and assigning libraries to those groups, you can run custom reports on specific consortia or group borrowing/lending practices.

Also, in **Groups Maintenance**, extended or shortened due dates can be granted to certain groups, overriding the **LendingDueDateDays** key. This is found in the Customization Manager under: System|Lending|Searching|LendingDueDateDays

Getting Started

https://prometheus.atlas-sys.com/display/illiad/Maintenance+Functions

Working with Library Groups

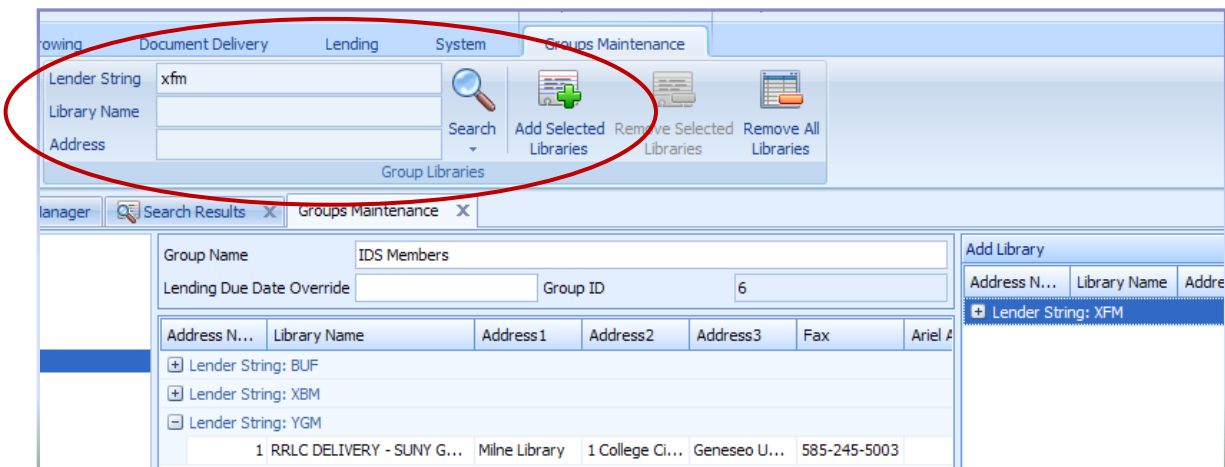1) Under **System** tab open **Groups Maintenance**
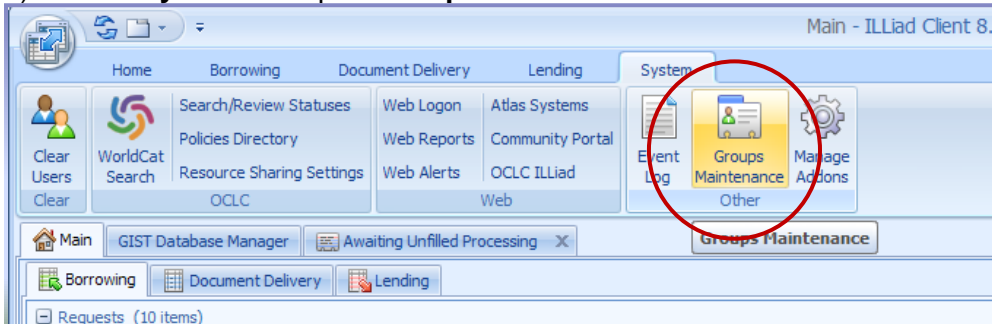
2) To make a new group <click> **New**
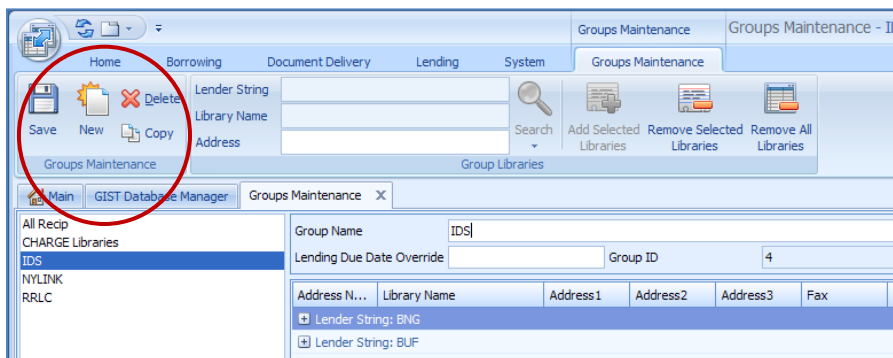
3) Assign your new group a name and type it into **Group Name**. Then <click> **Save**.
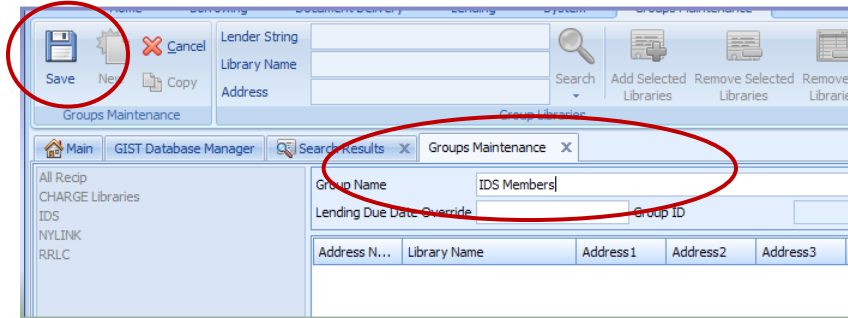
4) To add a library, first locate them by 3 letter OCLC code, library name, or address and then <click> **Add Selected Libraries.**

5) Finished adding libraries? Make sure you <click> the **Save** icon.

Two Notes:

1) If a library is not coming up when searched, it may not be in your ILLiad address book. Add them in under the **Lending tab | Address +**

2) If you wish to grant an extended loan period to a specific group, enter a number in the Lending Due Date Override box. This will override the key found in the Customization Manager: System|Lending|Searching|LendingDueDateDays

Things to consider

1) What groups of libraries would you like to run reports on?

2) Are there groups of libraries you would like to extend or shorten loan periods for?

Routing Rule to separate Library Group requests into separate Queues

- Do you wish to separate incoming Lending requests for specific groups of libraries (example IDS, local consortium, libraries you charge)?

Once groups are set up, incoming Lending Requests can be routed into separate queues based on the Group Number. In the example below, requests are presorted into **Awaiting CHARGE Processing**, **Awaiting IDS Agreement Processing**, **Awaiting ALL RECIP Agreement Processing** queues versus all importing into **Awaiting Lending Request Processing**.

Getting Started

A special queue

1) In the **Customization Manager**, expand **System|Custom Queues|CustomQueues**.
2) <Click> **New Record** to create a queue.
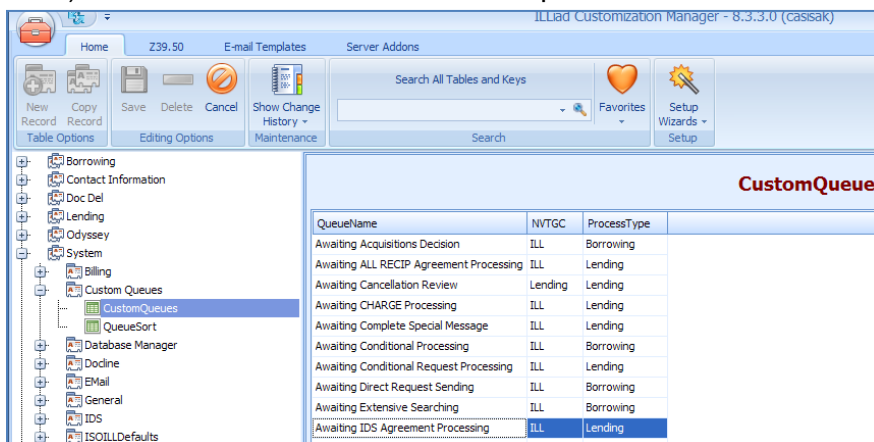
3) Add the values for the new queue. Don't forget to <click> **Save**.

Queue Name	(The name for the queue. Ex. Awaiting IDS Processing)
NVTGC	ILL
Process Type	Lending

Identifying the Group

1. In the Client, open **Groups Maintenance** tab.
2. <Click> the group name in the list (on the Left). This will bring the Group Name into the **Group Name** box and identify the group number, or **GroupID**. In this example IDS group is GroupID 4.
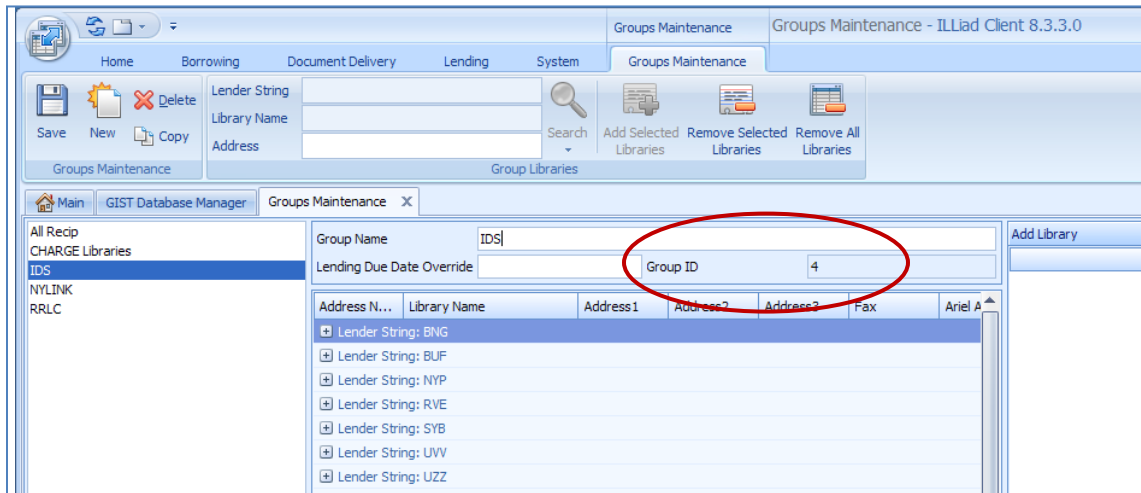
The Routing Rule

1. In the Customization Manager, expand **System|Routing|Routing**
2. <click> **New Record**
3. Enter the following:

Rule No	(Should be the first Lending rule)
Rule Active	Yes
Process Type	Lending
Match String	t.lendinglibrary in (select lenderstring from groupslink where groupnumber =[place your group number here])
New Process Type	Lending
New Transaction	[enter your new custom queue name]
Rule Description	Rule to route all new IDS lending requests into new IDS queue

Example of Match String:

t.lendinglibrary in (select lenderstring from groupslink where groupnumber =4)

4) Remember to **Save**.

NOTE: If a library is assigned to several groups this routing rule will not work. In this event, you can designate library 'XYZ' to import into a specific queue by entering them into the **Lending|Import Queues|BorrowerStatus** table in the **Customization Manager.**

Assigning libraries to a Queue using the BorrowerStatus table

1) In the **Customization Manager**, expand **Lending|Import Queues|BorrowerStatus**

2) To add a new record:
   a) <click> **New Record**.
   b) Fill out the record:

Borrower	(OCLC symbol)
Status	(the Custom Queue name)
NVTGC	ILL

   c) <click> **Save**