Customization Manager 101
Welcome!

Customization Manager 101 is right for you if:

• You don’t know what the Customization Manager is
• You have never used Customization Manager
• You have never made changes in Customization Manager
Agenda

- What is the Customization Manager
- Permissions
- Basic Settings/Best Practices
- Navigating the Customization Manager
- Reasons for Cancellations
- Timelines & Due Dates
- Custom Queues
- Emails
What is the Customization Manager?

- The Customization Manager is a toolbox full of ways to make ILLiad perform the way you want it to.

- Access the Customization Manager is gained via the shortcut that should be installed on your desktop. If you don’t have a shortcut, CM can be found in your C:\Program Files\ILLiad\Admin folder.

- Changes you make in the Customization Manager are **global** – remember that whatever changes you make will affect everyone at your site.

- With great power comes great responsibility – permission to make changes in the Customization Manager should be given only to supervisors or other trusted users.
Why Should I Make Changes to the Customization Manager?

- The Customization Manager puts you in the driver’s seat.

- Keys can be set to optimize your workflow, saving you time and ensuring that items are delivered quickly and seamlessly.

- Creating Custom Queues and Routing Rules streamlines processing – allowing you to highlight requests requiring special processing and eliminating the need to manually change statuses and sending emails outside of the ILLiad client.
Where Do I Get Permission to Access the Customization Manager?

- In order to make changes in the Customization Manager, you must have permission.

- Permissions are granted in the ILLiad Staff Manager.
Contact Information – Who are You?

- Contact Information Tables let people know who and where you are, and how to get in touch with you. Information in these tables is used to populate your emails and printed forms.

- Two Contact Information tables:
  - **ILL** – Borrowing lets your lenders know who to contact, hours, and mailing address.
  - **Lending** – who does a borrowing library contact for information?
Odyssey Trusted Sender

- Automates delivery of electronic document copies
- Eliminates the need to visually inspect each incoming document
- Documents are delivered directly to the Web
- Patrons are automatically notified
- Three settings:
  - Always
  - Never
  - Trusted
Borrowing Direct Request

- Enabling Direct Request in ILLiad allows you to automate routine processing.

- Direct Request currently is used mainly for loans.

- Two steps you must follow in order for Direct Request to work:
  1. Create your Direct Request Profile
  2. Activate the Direct Request Routing Rule and Key

Detailed instructions are found in your IDS Project Workflow Toolkit binder or on the Workflow Toolkit page at the IDS Project Website: http://www.idsproject.org/
Direct Request Profile

Access to your Direct Request Profile is through the client, under “System” and Resource Sharing Settings.

This opens up a form that guides you through setting up your Direct Request Profile.
Direct Request Routing

Routing

<table>
<thead>
<tr>
<th>Rule</th>
<th>RuleActive</th>
<th>ProcessType</th>
<th>TransactionStatus</th>
<th>MatchString</th>
<th>ResultProcessType</th>
<th>NewResultActionStatus</th>
<th>RuleDescription</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>t.Request... Borrowing</td>
<td>Awaiting OCLC Sending</td>
<td>Awaiting Direct Request Sending</td>
<td>Routing rule for IDS Circulation Available</td>
</tr>
<tr>
<td>2</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>ISSN &gt; a... Borrowing</td>
<td>Awaiting Direct Request Sending</td>
<td>Awaiting Direct Request Sending</td>
<td>Default Direct Request rule</td>
</tr>
<tr>
<td>3</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Lending Request Processing</td>
<td>Lendlr... Lending</td>
<td>Awaiting IDS Agreement Processing</td>
<td>Awaiting Direct Request Sending</td>
<td>Charge libraries routing rule</td>
</tr>
<tr>
<td>4</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Lending Request Processing</td>
<td>Lendlr... Lending</td>
<td>Awaiting IDS Agreement Processing</td>
<td>Awaiting Direct Request Sending</td>
<td>Charge libraries routing rule</td>
</tr>
<tr>
<td>5</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Shipping Label Printing</td>
<td>t.Request... Lending</td>
<td>Request Finished</td>
<td>No Shipping Labels Printed for Articles.</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Lending Request Processing</td>
<td>Lendlr... Lending</td>
<td>Awaiting ALL RECIP Agreement Processing</td>
<td>Awaiting Direct Request Sending</td>
<td>IDS Lending Rule</td>
</tr>
<tr>
<td>15</td>
<td>Yes</td>
<td>Borrowing</td>
<td>In Doc Del Stock Searching</td>
<td>t.Request... Doc Del</td>
<td>In Doc Del Stock Searching</td>
<td>Direct routing of journal articles request</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Yes</td>
<td>Borrowing</td>
<td>To Purchasing</td>
<td>t.Request... Doc Del</td>
<td>Awaiting Acquisitions Purchase Decision</td>
<td>Direct routing of e-journal articles request</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Copyright Clearance</td>
<td>t.Request... Borrowing</td>
<td>Awaiting IDS Sending</td>
<td>Awaiting Direct Request Sending</td>
<td>Rule to bypass copyright clearance</td>
</tr>
<tr>
<td>25</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>ISSN &gt; a... Borrowing</td>
<td>Awaiting IDS Sending</td>
<td>Awaiting Direct Request Sending</td>
<td>Default IDS Request</td>
</tr>
<tr>
<td>30</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting IDS Local Processing</td>
<td>ISSN &gt; a... Borrowing</td>
<td>Awaiting Request Processing</td>
<td>Awaiting Direct Request Sending</td>
<td>Rule to route the failed IDS Sendings</td>
</tr>
<tr>
<td>35</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Cancelled by Customer</td>
<td>t.UlNumber... Borrowing</td>
<td>Cancelled by ILS Staff</td>
<td>Awaiting Direct Request Sending</td>
<td>Automatically update all requests Cancel</td>
</tr>
<tr>
<td>40</td>
<td>Yes</td>
<td>Doc Del</td>
<td>Awaiting Document Delivery Processing</td>
<td>t.Request... Doc Del</td>
<td>Awaiting DD Stacks Searching</td>
<td>Direct routing of journal and book request</td>
<td></td>
</tr>
<tr>
<td>45</td>
<td>Yes</td>
<td>Doc Del</td>
<td>Awaiting Document Delivery Processing</td>
<td>t.Request... Doc Del</td>
<td>Awaiting DD Stacks Searching</td>
<td>Direct routing of journal and book request</td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Shipping Label Printing</td>
<td>t.Request... Lending</td>
<td>Item Shipped</td>
<td>No Shipping Labels Printed for Loans.</td>
<td></td>
</tr>
<tr>
<td>55</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Shipping Label Printing</td>
<td>CallNumber... Lending</td>
<td>Request Finished</td>
<td>Skips Shipping Label Printing for Articles</td>
<td></td>
</tr>
<tr>
<td>60</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Return Label Printing</td>
<td>t.Request... Borrowing</td>
<td>Request Finished</td>
<td>Bypass return label printing for loans in</td>
<td></td>
</tr>
</tbody>
</table>
Keys

- There are two different types of keys in CM
  1. Yes or No switch
     - Allows the user to activate or deactivate specific elements for the ILLiad Client, Billing, and/or Web Interface
2. Data transferring
   • CM acts as the middle man between ILLiad and the user’s computer
Keys – Data Transferring

- ILLiad → Computer
  - Example: Print Documents Path
    - Assign a folder location for ILLiad to know where to send the information

![PrintDocumentsPath](image-url)
Keys

• If the change is not satisfying or incorrect to the previous setting, double-click on the previous setting to change back.

http://screencast.com/t/69oPga32p
History

• Changes can be tracked
  – Optional to track the changes made within a certain amount of days
    • 7 days (1 week)
    • 30 days (1 month)
    • 365 days (1 year)
    • Show All (From beginning)

• Only Keys can be tracked!
Tables

• There are two different types of tables
  1. Creating information that will be displayed for ILLiad users
     – Example: Reasons for Cancellation and Custom Queue
  2. Creating commands to streamline through ILLiad
     – Example: Routing Rules and Email Routing
       – ILLiad will perform accordingly to the specific situation

http://workflowtoolkit.wordpress.com/lending-workflow/routing-rules-lending/

Changes

• Whenever any change occurs in CM, the information will have a yellow background.
  – The yellow indicates the change has not been saved yet
  – If you don’t want the change, choose cancel instead.
Favorites

- Are there any specific key or table information the user looks up frequently?
  - Avoid extra time spent on locating the information by bookmarking the information as a favorite
    - Right-click on the item and select “Add Favorite”
    - A dialogue box will appear if the user wants to customize the bookmark’s name
  - If the bookmarked information needs to be removed, right-click on the information and select “Remove Favorite”
Favorites (Video)

http://screencast.com/t/dnxAoknc
Search

• You know what you’re looking for but don’t know the location?
  – Use the search bar next to the Favorites tab

• http://screencast.com/t/yewixlCPpqil
Borrowing Reasons for Cancellation

Borrowing -> Cancellations -> ReasonsForCancellation
**Editing**

### Reasons For Cancellation

<table>
<thead>
<tr>
<th>Reason Number</th>
<th>NVTGC</th>
<th>Reason</th>
<th>Default Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>ILL</td>
<td>This is a duplicate request.</td>
<td>We have another request from you for the same piece.</td>
</tr>
<tr>
<td>14</td>
<td>ILL</td>
<td>Owned by Special Collections.</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>ILL</td>
<td>Other.</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>ILL</td>
<td>Item requested is a textbook or is required reading.</td>
<td>The HVCC Interlibrary Loan (ILL) policy states that textbooks or required reading are not requested through ILL. See our ILL policy on our website at https:….</td>
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<tr>
<td>17</td>
<td>ILL</td>
<td>Media item (DVDs, CDs, etc.) requested.</td>
<td>The HVCC Interlibrary Loan (ILL) policy states that Media items cannot be requested through ILL. See our ILL policy on our website at https:….</td>
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<tr>
<td>18</td>
<td>ILL</td>
<td>We are unable to process your requested article due to Copyright restrictions.</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>ILL</td>
<td>The book requested is an electronic book or electronic resource.</td>
<td>We are unable to borrow whole e-books. Please request another item.</td>
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</table>

### Edit Row

<table>
<thead>
<tr>
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**Double click on the Reason Number**

**Edit the Reason and/or Default Note**

**Don’t Forget to click Save**
Creating a New Reason

Click New Record
Enter the next sequential number
Add the Reason
Add a Default Note (optional)
Don’t forget to click Save

Reasons For Cancellation

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<tbody>
<tr>
<td></td>
<td>ILL</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Example

#### Reasons For Cancellation

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</table>

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<th>Reason</th>
<th>Default Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td>The book requested is an electronic book or electronic resource.</td>
<td>We are unable to borrow whole e-books. Please request another book that does not have [electronic book or electronic resource] in the title. Thank you!</td>
</tr>
</tbody>
</table>
Automated Overdue E-mail Settings

**BorrowingOverdueNoticesActive**

- **Settings**
  - Key Value:  
    - Yes
    - No

- **Description**
  Enables or disables the processing of borrowing overdue notification e-mails via System Manager.

**Value Changed From** | **Value Changed To** | **Changed Time** | **Changed By**
--- | --- | --- | ---

Double-click a tracking row to revert to the previous value.
Lending Overdue Settings (Customization Manager 8.3.5.0)

HVCC Settings:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>LendingOverdueGraceDays</td>
<td>5</td>
</tr>
<tr>
<td>LendingOverdueNoticeOneDays</td>
<td>10</td>
</tr>
<tr>
<td>LendingOverdueNoticeTwoDays</td>
<td>15</td>
</tr>
</tbody>
</table>
Borrowing Overdue Settings (Customization Manager 8.3.5.0)

HVCC Settings:

OverdueGraceDays: -7
OverdueNoticeOneDays: 1
OverdueNoticeTwoDays: 8
Custom Queues

What are they?

• Holding queues for routing transactions
• Available for borrowing and lending
• Appear in Request Groups, Route menu and patron accounts
• Destination for email routing and routing rules
• Examples: Invoice sent; Extensive search; Waiting for patron’s reply, etc.
Custom Queues

- Awaiting Lending Request Processing
- Awaiting Rush Request Processing
- Awaiting Conditional Request Processing
- Awaiting Renewal Request Processing
- Awaiting Stacks Searching
- In Stacks Searching
- Awaiting Lending Scanning
- Awaiting Shipping Label Printing
- In Shipping Label Print Queue
- Item Shipped
- Request Conditionalized
- Cancelled by ILL Staff
- Request Finished
- Hold Request
- Awaiting IDS Lending Request Process
- Awaiting ISO ILL Request Processing
- Awaiting RUSH Request Processing

EIS periodical/journal title
Invoice sent
Resend request
Under ILL supervisor's review
Custom Queues

Where are they?

System | Custom Queues
Custom Queues

Can be combined with emailing routing
Customization Manager...EMAILS
Customization Manager...EMAILS

- You can move any **additional** emails that you have created to the CM once you’re on 8.3 or 8.4
  - Check under System->E-mail->EMailLocation key to see if you placed them elsewhere
  - Originally they were in the client relative path (C:\Program Files\ILLiad\Email) and they may still be there
    - It is easier for future editing if they are in CM
    - It is easier to manage them if they are all in one place.
    - But, if you do not move them, ILLiad will still look wherever you specified in ILLiad under System->E-mail->EMailLocation key, and lastly searches the client relative path (C:\Program Files\ILLiad\Email).
Customization Manager...

EMAILS

- To Create New Emails
  - click on E-mail Templates and then New
Customization Manager...EMAILS
Customization Manager...EMAILS

• You can also look up field names at http://www.atlas-sys.com/documentation/illiad/content/ILLiadDatabaseDiagram.pdf

• Or, IDS has a cheat sheet will allow you to make basic adjustments to your email templates, or new additions to your email templates with ease, as well as a list of basic email templates

  • http://idsproject.org/emailtemplates.aspx
Customization Manager...EMAILS

• **Basic book and journal information**
  • <#LoanTitle> The title of the book
  • <#LoanAuthor> The Author of the book
  • <#LoanEdition> The edition of the book
  • <#PhotoJournalTitle> The title of the journal
  • <#PhotoJournalYear> The year that the journal was published
  • <#PhotoJournalVolume> The volume of the journal that was published
  • <#PhotoJournalIssue> The issue of the journal that was published
  • <#PhotoJournalInclusivePages> Pages from the item that the patron is requesting. This includes book chapters, or journal articles.
  • <#PhotoArticleTitle> The title of the article or book chapter that a patron is requesting
  • <#LoanAuthor> The author of a book or monograph
  • <#PhotoArticleAuthor> The author of an article or book chapter
Customization Manager...EMAILS

- **Basic contact information for the patron:**
  - `<#FirstName>` The patron's first name
  - `<#LastName>` The patron's last name

- **Your library’s contact information**
  - `<#SystemName>` This is your library’s name.
  - `<#LibraryName>` This is also the library’s name
  - `<#GeneralEMailAddress>` The library's general ILL email address.
  - `<#GeneralPhone>` The library's general ILL phone number

- **Borrowing**
  - `<#BorrowingHours>` The time that you are open for business with regards to borrowing
  - `<#BorrowingEMailAddress>` The email address of the person who handles your borrowing. This could be the same as your lending and your general email address depending on how big your department is.
  - `<#BorrowingPhone>` This is the phone number of your person in charge of borrowing. It could be the same as your general phone number and your lending phone number.
  - `<#BorrowingContactName>` The person in charge of borrowing. This could also be the same as the lending contact person
  - `<#LoanDate>` The Date that the item was loaned out
  - `<#DueDate>` The date that the item is due
  - `<#DocumentType>` Type of loan request.

- `<#ILLNumber>` ILLiad Transaction Number
- `<#TransactionNumber>` Transaction Number
- `<#OCLCSymbol>` The OCLC Symbol of the library
- `<#RenewalsAllowed>` If renewals are allowed. This is a Yes or No Field
Questions and Discussion
Thank you!

Further information can be found in the IDS Project Workflow Toolkit at:

http://toolkit.idsproject.org/

Or

Atlas Systems:

https://prometheus.atlas-sys.com/display/illiad/ILLiad+Customization+Manager (Version 8.4)