Customization Manager 501
Welcome

Customization Manager 501 is right for you if:

• You know what the Customization Manager is
• You have to troubleshoot ILLiad and have technical expertise.
• You understand the phrase “Change a Key Value”
<table>
<thead>
<tr>
<th>Your Presenters</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Tim Bowersox" /></td>
</tr>
<tr>
<td>Tim Bowersox Geneseo (YGM)</td>
</tr>
<tr>
<td><img src="image2" alt="Chris Sisak" /></td>
</tr>
<tr>
<td>Chris Sisak Nazareth (XNC)</td>
</tr>
<tr>
<td><img src="image3" alt="Bill Jones" /></td>
</tr>
<tr>
<td>Bill Jones IDS Project (YGM)</td>
</tr>
<tr>
<td><img src="image4" alt="Logan Rath" /></td>
</tr>
<tr>
<td>Logan Rath Brockport (XBM)</td>
</tr>
</tbody>
</table>
Who are you?

- Name
- Campus
- Customization Manager experience
Routing Rules

Or...

How to move a request from

A

B
### Routing

<table>
<thead>
<tr>
<th>RuleNo</th>
<th>RuleActive</th>
<th>ProcessType</th>
<th>TransactionStatus</th>
<th>MatchString</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Copyright Clearance</td>
<td>t.DocumentType = 'Eres' AND t.</td>
</tr>
<tr>
<td>1</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Copyright Clearance</td>
<td>RequestType='Article'</td>
</tr>
<tr>
<td>2</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>RequestType='Article' AND t.</td>
</tr>
<tr>
<td>3</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>u.Status='GIST Guest'</td>
</tr>
<tr>
<td>4</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(select 1 FROM GISTWeb gw W</td>
</tr>
<tr>
<td>5</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(select 1 FROM GISTWeb gw W</td>
</tr>
<tr>
<td>6</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(select 1 FROM GISTWeb gw W</td>
</tr>
<tr>
<td>7</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(select 1 FROM GISTWeb gw W</td>
</tr>
<tr>
<td>8</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(select 1 FROM GISTWeb gw W</td>
</tr>
<tr>
<td>9</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(select 1 FROM GISTWeb gw W</td>
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<tr>
<td>10</td>
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<td>Awaiting Request Processing</td>
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<tr>
<td>11</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(select 1 FROM GISTWeb gw W</td>
</tr>
<tr>
<td>12</td>
<td>No</td>
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<tr>
<td>13</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>RequestType='Loan' AND ISN</td>
</tr>
<tr>
<td>14</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>RequestType='Loan' AND t.</td>
</tr>
<tr>
<td>15</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>u.Status=u.Status</td>
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<tr>
<td>16</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting IDS Local Processing</td>
<td>u.Status=u.Status</td>
</tr>
<tr>
<td>17</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Mine Delivered to Web</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Available in Mine</td>
<td>u.Status=u.Status</td>
</tr>
<tr>
<td>19</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Document Delivery Processing</td>
<td>t.Location &lt;&gt; NULL AND t.</td>
</tr>
<tr>
<td>20</td>
<td>No</td>
<td>Borrowing</td>
<td>Awaiting Return Label Printing</td>
<td>t.TransactionNumber In (select</td>
</tr>
<tr>
<td>21</td>
<td>Yes</td>
<td>Doc Del</td>
<td>Purchase Request Denied</td>
<td>u.Status=u.Status</td>
</tr>
<tr>
<td>22</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Shipping Label Printing</td>
<td>t.RequestType = 'Eres'</td>
</tr>
<tr>
<td>23</td>
<td>Yes</td>
<td>Lending</td>
<td>Delivered to Web</td>
<td>t.DocumentType = 'Eres'</td>
</tr>
<tr>
<td>24</td>
<td>No</td>
<td>Borrowing</td>
<td>Awaiting Return Label Printing</td>
<td>t.TransactionNumber In (select</td>
</tr>
<tr>
<td>25</td>
<td>Yes</td>
<td>Doc Del</td>
<td>Purchase Request Denied</td>
<td>u.Status=u.Status</td>
</tr>
<tr>
<td>26</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Shipping Label Printing</td>
<td>t.RequestType = 'Loan'</td>
</tr>
</tbody>
</table>
Anatomy of a routing rule

- **RuleNo** = Each rule waits in line. This sets the order.
- **RuleActive** = The on/off switch.
- **ProcessType** = Apply this rule to Borrowing, Lending, or Doc Del.
- **TransactionStatus** = Apply this rule to a specific queue.
- **MatchString** = Apply this rule if it matches your criteria.
- **NewProcessType** = Move the request to Borrowing, Lending, or Doc Del.
- **NewTransactionStatus** = Move the request to a specific queue.
- **RuleDescription** = A brief note explaining what this rule does.
• You can’t spell MatchString without SQL
  – Boolean operators: **AND, OR, NOT**
  – Comparison operators: =, <>, >, <, >=, <=
  – Use **NULL** to test for empty fields
  – Can incorporate advanced SQL functions (i.e. “select”)
  – *Never* use double-quotes
  – All fields have table prefixes (i.e. “u.Status”)
  – Don’t exceed 255 characters
• MatchStrings can look at data from:
  – **Transactions** table
  – **Users** table (Borrowing & Doc Del)
  – **LenderAddresses** table (Lending)
• Route between Borrowing & Doc Del
• Move to any queue – including custom queues
• Routing rule rules to live by
  – Routing rules *cannot* update an OCLC status
  – No daisy chaining
  – Order is important
  – Requests can get stuck in loops
  – Too many rules will slow down ILLiad
  – Rube Goldberg's can break ILLiad
System Addons will change routing forever!

- Route *and* change OCLC status!
- No character limits!
- Complex algorithms!
- Downloadable!
- They’re bigger on the inside!
Email Templates in the Customization Manager

Discuss the following:

Talk with a partner and brainstorm one way you could make an email you send, better.

– Adding unique information from the request
– Changing the language of an email to sound like a human sent it
To copy over an email:

1. Open an email file that you currently use
2. Choose E-mail Templates in the ribbon.
3. Click New to add a new email
4. Give the email a name (.txt not required)
5. Give the email a description (not used anywhere)
6. Copy and paste the body of the email into the editor.

Documentation
Don’t forget the Workflow Toolkit

http://idsproject.org/emailtemplates.aspx
Tips and tricks

• Right-click to get a field name when typing

• There’s no spell-check! (use Word first)

• Name: must match exactly in the EmailRouting table
When an email and a routing rule really love each other...

We’re a perfect MatchString, baby

Let’s update our Transaction Status
They make something really special
Workform Mapping

1. What is it?
2. Where is it?
3. Fields you need to know about
4. Why do you need it?
Workform Mapping: What is it?

It tells ILLiad what information to import into the OCLC Work Form when requesting items via OCLC.
Workform Mapping: Where is it?

System | OCLC | WorkFormMapping
# Workform Mapping: Fields

<table>
<thead>
<tr>
<th>NVTGC</th>
<th>WorkFormType</th>
<th>OCLCFieldName</th>
<th>ILLiadFields</th>
<th>ConstantDataAction</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>issueNumber</td>
<td>&lt;#PhotoJournalIssue&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>pages</td>
<td>&lt;#PhotoJournalInclusivePages&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>patron</td>
<td>&lt;#LastName&gt;, &lt;#FirstName&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>pmid</td>
<td>&lt;#PMID&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>title</td>
<td>&lt;#PhotoJournalTitle&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>verified</td>
<td>&lt;TN: &lt;#TransactionNumber&gt;&gt; &lt;#Odyssey&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>volume</td>
<td>&lt;#PhotoJournalVolume&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>Loan</td>
<td>doi</td>
<td>&lt;#DOI&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>Loan</td>
<td>patron</td>
<td>&lt;#LastName&gt;, &lt;#FirstName&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>Loan</td>
<td>pmid</td>
<td>&lt;#PMID&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>Loan</td>
<td>verified</td>
<td>&lt;TN: &lt;#TransactionNumber&gt;&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>OCLC Article</td>
<td>articleAuthor</td>
<td>&lt;#PhotoArticleAuthor&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>OCLC Article</td>
<td>author</td>
<td>&lt;#PhotoArticleAuthor&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>OCLC Article</td>
<td>doi</td>
<td>&lt;#DOI&gt;</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>OCLC Article</td>
<td>issuedate</td>
<td>&lt;#PhotoJournalYear&gt;</td>
<td></td>
</tr>
</tbody>
</table>
Workform Mapping: Fields

<table>
<thead>
<tr>
<th>ILL</th>
<th>OCLCFIELDNAME</th>
<th>ILLiad FIELDNAME</th>
<th>OCLCFIELDNAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILL</td>
<td>Blank Loan</td>
<td>title</td>
<td>LoanTitle</td>
</tr>
<tr>
<td>ILL</td>
<td>Blank Loan</td>
<td>verified</td>
<td>TransactionNumber</td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>article</td>
<td>PhotoArticleTitle</td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>articleAuthor</td>
<td>PhotoArticleAuthor</td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>copyrightCompliance</td>
<td>Copyright</td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>doi</td>
<td>DOI</td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>issuedate</td>
<td><strong>PhotoJournalMonth</strong> <strong>PhotoJournalYear</strong></td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>issueNumber</td>
<td>PhotoJournalIssue</td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>pages</td>
<td>PhotoJournalInclusivePages</td>
</tr>
<tr>
<td>ILL</td>
<td>IDSArticle</td>
<td>patron</td>
<td>LastName, FirstName</td>
</tr>
</tbody>
</table>

Can only be one OCLCFIELDNAME per entry, but can have multiple ILLiad field names per entry.
## Workform Mapping: OCLC Fields

- affiliation
- article
- articleauthor
- author
- billingnotes
- billto
- borrowingnotes
- callnumber
- copyrightcompliance
- dissertation
- doi
- edition
- email
- fax
- Imprint
- Insurance
- isbn
- issn
- issuedate
- issuenumber
- locations
- maxcostamount
- maxcosttype
- needbeforedate
- pages
- patron
- patronaddress
- patrondepartment
- patronemail
- patronfax
- patronid
- patronnotes
- patronphone
- patronpickuplocation
- patronstatus
- pmid
- series
- shipto
- shipvia
- title
- uniformtitle
- verified
- volume
Workform Mapping: Why?

- Adding or deleting fields you no longer wish imported into the OCLC request

Example: Deleting/Editing Patron information

Switch out `<#LastName>`, `<#FirstName>` and leave blank or insert `<#Username>`
Workform Mapping: Why?

• Having Appropriate fields filling in when using the Blank Workform Requests

  Example: Adding/fixing the blank Article/blank Loan workforms

• Non-cataloged items
  • Honors’ Theses
  • Specialized collection material
  • ERIC docs
Workform Mapping: Adding Entries

- New Record icon
- Identify the WorkFormType
- Identify the OCLC field name
- Map to it:
  - any fields in the ILLiad Transactions, Users or LocalInfo tables
  - Any text message you wish to add

Don’t forget to save!
Workform Mapping: More Info

- https://prometheus.atlas-sys.com/display/illiad/The+WorkFormMapping+Table
ILLiad Web Forms
Why Talk About Web Forms?

- Creating generic request forms
- Customizing current forms
- Understanding the deployment package
- Knowing what files you need to change
Where can I download the “Out of the Box” version of ILLiad Web Forms?

https://prometheus.atlas-sys.com/display/illiad/ILLiad+8.4+Client+Executable+Files#ILLiad8.4ClientExecutableFiles-WebPages

Or ... use Google™ and search ILLiad executable

*Quoted phrase search not necessary (librarian joke)*
Where Can I Download The Files?

For your convenience, below is a list of the locally installed ILLiad client executable files. This includes the ILLiad Client, Customization Manager, Staff Manager, Odyssey Helper and Odyssey Manager. All other ILLiad components are installed/updated on the ILLiad web server.

**Installer/Updaters**
- ILLiad 8.4 Client Installer
- Web Pages
- ILLiad 8.4 Default Web Pages
- Word Templates
- ILLiad 8.4 New Word Document Templates
- ILLiad 8.4 Billing Manager
- Related Topics

**Web Pages**
- ILLiad 8.4 Default Web Pages
  - ILLiad84DefaultWebPages.zip
  - This zip file contains a complete set of the new default web pages including updates as outlined in the 8.4 Release Notes.
<table>
<thead>
<tr>
<th>Path</th>
<th>Date</th>
<th>Time</th>
<th>Type/Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>css</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 1 KB</td>
</tr>
<tr>
<td>js</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 2 KB</td>
</tr>
<tr>
<td>Lending</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 1 KB</td>
</tr>
<tr>
<td>AboutILLiad</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 2 KB</td>
</tr>
<tr>
<td>ArticleRequest</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 3 KB</td>
</tr>
<tr>
<td>Blocked</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 1 KB</td>
</tr>
<tr>
<td>BookChapterRequest</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 2 KB</td>
</tr>
<tr>
<td>ChangePassword</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 9 KB</td>
</tr>
<tr>
<td>ChangeUserInfo</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 3 KB</td>
</tr>
<tr>
<td>ConferencePaperRequest</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 2 KB</td>
</tr>
<tr>
<td>DetailedInformation</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 10 KB</td>
</tr>
<tr>
<td>DisavowedUsername</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 2 KB</td>
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<tr>
<td>EditAccountInformation</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
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<tr>
<td>EditArticleRequest</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
</tr>
<tr>
<td>EditBookChapterRequest</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
</tr>
<tr>
<td>EditConferencePaperRequest</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
</tr>
<tr>
<td>EditGenericRequestTesting</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
</tr>
<tr>
<td>EditLoanRequest</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
</tr>
<tr>
<td>EditOtherRequest</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
</tr>
<tr>
<td>EditPatentRequest</td>
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</tr>
<tr>
<td>EditReportRequest</td>
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</tr>
<tr>
<td>EditStandardsDocumentRequest</td>
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<td>3:23 PM</td>
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</tr>
<tr>
<td>EditThesisRequest</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
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<tr>
<td>Error</td>
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</tr>
<tr>
<td>ForgotPassword</td>
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<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
</tr>
<tr>
<td>GenericRequestTesting</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
</tr>
<tr>
<td>ILLiadMainMenu</td>
<td>3/16/2013</td>
<td>3:23 PM</td>
<td>Firefox HTML Doc... 11 KB</td>
</tr>
</tbody>
</table>
View Pages

- ViewAllRequests
- ViewDefaultDetailed
- ViewDetailedInformation
- ViewNotifications
- ViewOutstandingRequests
- ViewRenewCheckedOutDetailedInformation
- ViewRenewCheckedOutItems
- ViewRequestHistory
- ViewResubmitCancelledRequests
- ViewResubmitDetailedInformation
- ViewSearchResults

ILLiad
Choose an option from the choices below.

- Logoff genie
- Main Menu
  - New Request
    - Photocopy
    - Book
    - Book Chapter
    - Conference Paper
    - Patent
    - Report
    - Thesis
    - Standards Document
    - Other (Free Text)

View
  - Outstanding Requests
  - Electronically Received Articles
  - Checked Out Items
  - Cancelled Requests
  - History Requests
  - All Requests
  - Notifications

Tools
  - Change User Information
  - Change Accounts
  - Change Password

About ILLiad
View Pages

- ViewAllRequests
- ViewDefaultDetailed
- ViewDetailedInformation
- ViewNotifications
- ViewNotificationsDetail
- ViewOutstandingRequests
- ViewRenewCheckedOutDetailedInformation
- ViewRenewCheckedOutItems
- ViewRequestHistory
- ViewResubmitCancelledRequests
- ViewResubmitDetailedInformation
- ViewSearchResults

### IDS Office

- IDsd@geneese.edu
- 585-245-5559
- 155 Main St.
- Office hours: Monday - Friday 8:00am - 5:00pm
- Closed Saturday - Sunday

### Information Delivery Services (IDS)

#### MAIN MENU
- Account Settings
- Recent Account Notifications
- Log Out

#### Place a New Request
- Book or Media
  - Request to borrow a book or media material.
- Journal Article
  - Request a copy of an article from a journal or magazine.
- Book Chapter
  - Request a copy of a book chapter.

#### View Your Account Activity
- Active Requests
  - Check the status of your active requests.
- Checked Out Items
  - View and renew items you have borrowed through IDS.
- Received Articles
  - Download articles and book chapters that you have received.
- Request History
  - View all of your IDS requests.

### Announcements

#### Requesting your textbooks through IDS?
MILNE Library has greatly expanded its Textbook Reserve program. This means that a larger number of your textbooks are available at the Service Desk for 4-hour loans, allowing as many students as possible to benefit from this collection.

Although we understand your need to have a textbook for the entire semester, please note that IDS will not borrow a copy of items on Textbook Reserve from other libraries. This is due to our agreement with other libraries to not request materials that we already have available.

Please also note the following:
- If you do request a textbook that we have on reserve, we will notify you via email that it is available for use at the Service Desk. It may be helpful to bring this email with you, as it will help the Service Desk staff locate the item.
- The latest edition of textbooks are extremely hard to borrow. If we don’t already own a copy of a recent edition, we will try our best to borrow one for you.
- You are typically unable to borrow textbooks through IDS for an entire semester. Many libraries only allow 4-6 week loan periods.
- Please do not mark in borrowed textbooks (or any books for that matter) or you may be responsible for replacement charges.

#### How does IDS work?
Place a request whenever you see the blue "Get it" button or by logging into your IDS account.
- If MILNE has it, we’ll get it and deliver it to you (usually within 2 days).
- Otherwise, we’ll try to get it from another library or vendor (usually within 5-7 days).
- We’ll notify you via email when your items arrive, or if we run into any difficulties.

#### How do I renew my IDS materials?
The easy way, log into your IDS Account and view your checked out items. Then click on the transaction number for the item you need to renew and click the “Renew” link at the top of the page.
Breaking Down the List of Files

Request Forms

- ArticleRequest
- BookChapterRequest
- ConferencePaperRequest
- GenericRequestTesting
- LoanRequest
- OtherRequest
- PatentRequest
- ReportRequest
- StandardsDocumentRequest
- ThesisRequest

Edit Forms

- EditArticleRequest
- EditBookChapterRequest
- EditConferencePaperRequest
- EditGenericRequestTesting
- EditLoanRequest
- EditOtherRequest
- EditPatentRequest
- EditReportRequest
- EditStandardsDocumentRequest
- EditThesisRequest
Breaking Down the List of Files

Request Forms
- ArticleRequest
- BookChapterRequest
- ConferencePaperRequest
- GenericRequestTesting
- LoanRequest
- OtherRequest
- PatentRequest
- ReportRequest
- StandardsDocumentRequest
- ThesisRequest

Edit Forms
- EditArticleRequest
- EditBookChapterRequest
- EditConferencePaperRequest
- EditGenericRequestTesting
- EditLoanRequest
- EditOtherRequest
- EditPatentRequest
- EditReportRequest
- EditStandardsDocumentRequest
- EditThesisRequest
Includes are replicable elements (sets of code) that save coding time.

You could think of these as analogous to a “class” or “ID” in .css
What if I wanted dropshadow on 1000 pictures? I could just make one class called “.dropshadow” and apply that class to every image, instead of writing the style for each image every time.

```
.dropshadow {
  -moz-box-shadow: 3px 3px 4px #000;
  -webkit-box-shadow: 3px 3px 4px #000;
  box-shadow: 3px 3px 4px #000;
  /* For IE 8 */
  -ms-filter: "progid:DXImageTransform.Microsoft.Shadow(Strength=4, Direction=135, Color="#000000")";
  /* For IE 5.5 - 7 */
  filter: progid:DXImageTransform.Microsoft.Shadow(Strength=4, Direction=135, Color="#000000");
}
```
Elements that would normally exist within the `<head>` tag

Hidden code for variables (status, user, doc type, request type)
Breaking Down the List of Files

Includes

- include_footer
- include_head
- include_header
- include_header_request
- include_menu
- include_request_buttons
- include_request_cited

ILLiad

Choose an option from the choices below

- Logoff genie
- Main Menu
- New Request
  - Photocopy
  - Book
  - Book Chapter
  - Conference Paper
- View
  - Outstanding Requests
  - Electronically Received Items
  - Checked Out Items
  - Cancelled Requests
  - History Requests
  - All Requests
  - Notifications
- Tools
  - Change User Information
  - Change Accounts
  - Change Password
- About ILLiad
Where's the Magic?

ILLiad .dll

Turns <#Command> into real text
How Can I Edit These Files?

Resources: W3C Schools, Stackoverflow, Codeproject
Where are the files located?
• Directly in the ILLiad folder (inet pub)

You can ...
• Use the same include for Article request faculty and Article request student
• Create a Form includes folder
• Status will work with includes the same way that they work with webpages
• You can take them to the web person in your library to make these changes
Creating new files on the server:
Using the name conventions

GenericRequestMediaRequest
EditGenericRequestMediaRequest

You need to have both the Request and Edit for the Request!
Creating Generic Request Form

Change Form name, change DocumentType and RequestType

```
<html>
<head>
  <title>ILLiad - Media Request</title>
  <link rel="stylesheet" type="text/css" href="css/main.css" media="screen" />
  <link rel="stylesheet" type="text/css" href="css/print.css" media="print" />
  <!--[if lte IE 6]>
  <link rel="stylesheet" type="text/css" href="css/ie6_or_less.css" />
  <![endif]-->
</head>
<body id="type-b">
<div id="wrap">
  <div id="content-wrap">
    <div id="content">
      <form action="illiad.dll" method="post" name="GenericRequestMediaRequest" class="f-wrap-request">
        <input type="hidden" name="DocumentType" value="Media">
        <input type="hidden" name="RequestType" value="Loan">
        <input type="hidden" name="Username" value="<PARAM name="Username">">
        <input type="hidden" name="SessionID" value="<PARAM name="SessionID">">
        <div class="req">b</div> Indicates required field</div>
      </form>
      <h3>Media Request</h3>
      <h2>Description</h2>
    </div>
  </div>
</div>
```
You need to specify in the CM that movie title is a required field

Web Validation Table
Regular expression match

Web Interface
Formname: GenericRequestMedia
Fieldname: Loantitle
Validation: .+
Error: Please enter movie title
ErrorTag: ERRORLoanTitle

Values for ErrorTag needs to match Fieldname
The beginning of the field will be different LoanTitle vs. ERRORLoanTitle

.+ means that it needs to be filled out
Things with dates, \d is digit, brace is length
WARNING!!!

No Radio Buttons!

No Check Boxes!
If you need more in-depth information, go to:

“Flex Your ILLiad Muscles: Maximizing the Strength of Your Online Web Presence” (L. Rath, K. Keegan) Thurs. 10:30am – 11:20am
HELP! I’m Stuck!

- **Testweb** – for the development sandbox
- **Atlas Training videos** – find these through the ILLiad
- **IDS Mentors** have access to those training videos
OpenURL Mapping

1. What is it?
2. Where is it?
3. Fields
4. Why do you need it?
OpenURL Mapping: What is it?

OpenURL tells ILLiad what information to import into the Web Request form from a database.

https://brockport.illiad.oclc.org/illiad/illiad.dll?Action=10&Form=30&sid=EBSCO%3APsyCINFO&genre=article&artnum=&a title=Perceptions+of+high+school+library+media+specialists+and+their+students+and+their+stude...
OpenURL Mapping: Where is it?

Web Interface | OpenURL | OpenURL Mapping

<table>
<thead>
<tr>
<th>Id</th>
<th>NYTGC</th>
<th>URL_Version</th>
<th>rft_id</th>
<th>dl_action</th>
<th>dl_field_name</th>
<th>OpenURL_field_values</th>
<th>dl_value</th>
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</thead>
<tbody>
<tr>
<td>19</td>
<td>LLL</td>
<td>Default</td>
<td>Replace</td>
<td>Photo:journal</td>
<td>volume</td>
<td><code>&lt;rft:volume&gt;</code></td>
<td></td>
</tr>
<tr>
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<td>Default</td>
<td>Replace</td>
<td>Photo:journal</td>
<td>year</td>
<td><code>&lt;rft:date&gt;</code></td>
<td>yyyy</td>
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<td>Substitute:genre</td>
<td>RequestType</td>
<td>bookitem</td>
<td>Article:Book:Chapter:BookChapterRequest.html</td>
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<tr>
<td>37</td>
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<td>Default</td>
<td>Substitute:genre</td>
<td>RequestType</td>
<td>conference</td>
<td>Article:Conference:ConferencePaperRequest.html</td>
<td></td>
</tr>
<tr>
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<td>Substitute:genre</td>
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<td>Loan:Book:LoanRequest.html</td>
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<td>journal</td>
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<td>RequestType</td>
<td>unknown</td>
<td>Loan:Book:LoanRequest.html</td>
<td></td>
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</table>
OpenURL Mapping: Where is it?

Entries for Custom Request Types

<table>
<thead>
<tr>
<th>Id</th>
<th>NYTGC</th>
<th>URL_Ver</th>
<th>rft_id</th>
<th>ILLiadAction</th>
<th>ILLiadFieldname</th>
<th>ILLiadFieldValues</th>
<th>OpenURLFieldValues</th>
<th>ILLiadValue</th>
</tr>
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<tbody>
<tr>
<td>19</td>
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<td>Replace</td>
<td>PhotoJournalVolume</td>
<td><code>&lt;rft.volume&gt;</code></td>
<td><code>&lt;rft.date&gt;</code></td>
<td>DATE/yyyy</td>
<td>Article:Article:ArticleRequest.html</td>
</tr>
<tr>
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<td>Default</td>
<td>Replace</td>
<td>PhotoJournalYear</td>
<td><code>&lt;rft.date&gt;</code></td>
<td>DATE/yyyy</td>
<td>Article:Article:ArticleRequest.html</td>
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</tr>
<tr>
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<td>Substitute:genre RequestType</td>
<td>article</td>
<td>Article:Book:BookChapter:BookChapterRequest.html</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>ILL</td>
<td>Default</td>
<td>Substitute:genre RequestType</td>
<td>book</td>
<td>Loan:Book:LoanRequest.html</td>
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<td></td>
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<td>Default</td>
<td>Substitute:genre RequestType</td>
<td>dissertation</td>
<td>Loan:Loan:ThesisRequest.html</td>
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<tr>
<td>27</td>
<td>ILL</td>
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<td>Substitute:genre RequestType</td>
<td>journal</td>
<td>Loan:Book:LoanRequest.html</td>
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<td>ILL</td>
<td>Default</td>
<td>Substitute:genre RequestType</td>
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<td>ILL</td>
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<tr>
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<td>Substitute:genre RequestType</td>
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<td>36</td>
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<td>bookitem</td>
<td>Article:Book:BookChapter:BookChapterRequest.html</td>
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<tr>
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<td>conference</td>
<td>Article:Conference:ConferencePaperRequest.html</td>
<td></td>
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<td></td>
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<tr>
<td>38</td>
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<td>Default</td>
<td>Substitute:genre RequestType</td>
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<td>unknown</td>
<td>Loan:Book:LoanRequest.html</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
OpenURL Mapping: Fields

This table translates a URL string into values that ILLiad can understand (<#PARAM>).

- **rft_val_fmt**=info%3Aofi%2Ffmt%3Akev%3Amtx%3Abook
- **rft.genre**=book
- **rfr_id**=info:sid/idsproject.org:library
- **pid**=MARC_001%3DBRO01-000060325%26MARC_035%3D496078%26OCLC_NUMBER%3D28798175
- **rft.au**=Mincy%2C+Ronald+B.
- **rft.isbn**=0877665982
- **rft.title**=Nurturing+young+Black+males+%3A+challenges+to+agencies%2C+programs%2C+and+social+policy%2FRonald+B.+Mincy%2C+editor.
- **rft.date**=c1994.
- **rft.pub**=Urban+Institute+Press+%3B
- **ESPNumber**=28798175
Troubleshooting an OpenURL problem

• Find a **decoder** (I like the one on meyerweb.com)
• Use a text program to split out the pieces of OpenURL and examine them.
• Check ALL the OpenURL links.

<table>
<thead>
<tr>
<th>What’s going on?</th>
<th>Who you going to call?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wrong OpenURL string going to link resolver</td>
<td>Database customer support</td>
</tr>
<tr>
<td>Wrong OpenURL string into ILLiad</td>
<td>Link Resolver support</td>
</tr>
<tr>
<td>Wrong ILLiad page being loaded (w/ good link)?</td>
<td>ILLiad support (OCLC)</td>
</tr>
<tr>
<td>Something weird and it don’t look good?</td>
<td>Ghostbusters!</td>
</tr>
</tbody>
</table>
Questions?

• Any issues you’d like help with?
• Want to know if something’s possible?
• Have a crazy idea that just might work?