Welcome!

Made possible by our Strategic Partners
Wi-fi Info

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

10:00am  Coffee & Registration
10:30am  Welcome, Updates, and Announcements
11:00am  ILLiad 8.6 Preparation Guide for Email Templates
12:00pm  Lunch
1:00pm  Creative Ways to Use Your Email Template Using Routing Rules
2:00pm  Coffee Break
2:15pm  Guide for ILLiad Print Templates
3:30pm  Wrap Up
6:00pm  Dinner
Update
Thank you to our conference sponsors
Partnerships
New Regional User Group Chairs

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

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

METRO:
- Chair: Rebecca Hyams
- Co-Chair: Philip Mui
Current Membership

![Bar chart showing membership growth from Spring 2004 to Spring 2015.

- Spring 2004: 12 members
- Spring 2005: 13 members
- Spring 2006: 21 members
- Spring 2007: 29 members
- Spring 2008: 36 members
- Spring 2009: 38 members
- Spring 2010: 51 members
- Spring 2011: 62 members
- Spring 2012: 73 members
- Spring 2013: 75 members
- Spring 2014: 75 members
- Spring 2015: 82 members]
Expansion Libraries

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

Courses:
Borrowing 101 | Lending 101 | Copyright 101

Seats limited to 30 students. Fall Registration Dates forthcoming
Online Workshops
Opening again this Fall!
Mentor Program: Benefits if you have a Mentor

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

- General on-call assistance
- Available via email
- Go-to-Assist online support
- Polishing-up after Atlas training
- Workflow evaluation & optimization
- Workflow Toolkit updates & additions
- Access to Mentors at Regional User Groups
- Site visits
What’s New with Logic?
Current IDS Logic Beta Testers

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

Syracuse and Upstate Medical
IDS Logic Modules

Borrowing Availability Service
Book Chapter Direct Requester
Lending Book Chapter Availability Lookup
Custom Transaction Router Emailer
Lending Availability Service
Direct Request Enhancer
ALIAS 2.0
Borrowing Availability Service

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

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

Lending Book Chapter Availability Lookup

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

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

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

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

- Takes the OCLC # or ISBN and transforms into mostly held OCLC number of a different edition
- Routes the Transaction to “Awaiting Direct Request Sending”
- Transaction is sent out to potential lenders via the LendingString created based on Custom Holdings and Direct Request profile
- If it fails, it will try the next most commonly held OCLC # matching the item requested
33 IDS libraries have upgraded to ALIAS 2.0.

Have you?

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

Looking to automate end of year reports.

We’re also looking for ideas from you to see what types of reports you would like automatically generated.
ILLiad 8.6 Preparation Guide for Email Templates
Benefits of sending e-mails through ILLiad

● E-mails are already typed and ILLiad will merge information such as patron name and request info
● You know who sent the e-mail
● You know what day and time the e-mail was sent
● E-mails are in the transaction history for all staff to see and read
● E-mails paired with Routing Rules save time (Example: Borrowing-Renewal E-mail routes the book request back to Checked Out to Customer)
What is changing in 8.6

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

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

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

System > EMail > EMailLocation
C:\Program Files
C:\Program Files (x86)
Network Drive

.txt files
Do I need to move anything?
# ILLiad 8.5 Default E-mails

## Overdue Emails
- BorrowingOverdue1
- BorrowingOverdue2
- BorrowingOverdue3
- BorrowingOverdueReminder
- LendingOverdue1
- LendingOverdue2
- LendingOverdue3
- LendingOverdueReminder

## Article Exchange
- ArticleExchangeLendingNotification

## Notification Emails
- ILLArticleNotify
- ILLArticleDeliveryNotify
- ILLLLoanNotify
- ILLLLoanDeliveryNotify
- ILLDDArticleNotify
- ILLDDArticleDeliveryNotify
- ILLDDLoanNotify
- ILLDDLoanDeliveryNotify

[https://prometheus.atlas-sys.com/display/illiad/Moving+Email+Templates+BEFORE+Updativeto+ILLiad+8.6](https://prometheus.atlas-sys.com/display/illiad/Moving+Email+Templates+BEFORE+Updativeto+ILLiad+8.6)
8 Default templates that will be moved during the upgrade

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

**Lending**
- **Lending Cancel** - The email used to notify lenders their request has been cancelled.
- **Lending Password Reset** - The email used when a lending user requests a password reset.
ILLiad 8.6 Default Borrowing Emails

Auto Cleared User - The email used when a user registers and is automatically cleared.
Borrowing Cancellation Article - The email used when sending out the borrowing article cancellation email.
Borrowing Cancellation Loan - The email used when sending out the borrowing loan cancellation email.
Borrowing Electronic Delivery - The email used when sending out the borrowing electronic delivery notification email.
Borrowing Overdue 1 - The email text used when sending out borrowing overdues for the first overdue period.
Borrowing Overdue 2 - The email text used when sending out borrowing overdues for the second overdue period.
Borrowing Overdue 3 - The email text used when sending out borrowing overdues for the third overdue period.
Borrowing Overdue Reminder - The email text used when sending out borrowing overdue reminders.
Borrowing Password Reset - The email used when a borrowing user requests a password reset.
Cleared User - The email used when sending out the notification email when a user is cleared.
Disavowed User - The email used when sending out the notification email when disavowing a user.
ILL Borrowing Article Delivery - The notification email text used for articles delivered to customers.
ILL Borrowing Article Pickup - The notification email text used for articles available for customer pickup.
ILL Borrowing Loan Delivery - The notification email text used for loans delivered to customers.
ILL Borrowing Loan Pickup - The notification email text used for loans available for customer pickup.
Merged User - The email used when sending out the notification email when two user records are merged.
Article Exchange Lending Notification - The email text used to notify a borrowing library that an Article Exchange document has been uploaded.
Lending Cancellation Article - The email used when sending out the lending article cancellation email.
Lending Cancellation Loan - The email used when sending out the lending loan cancellation email.
Lending Overdue 1 - The email text used when sending out lending overdues for the first overdue period.
Lending Overdue 2 - The email text used when sending out lending overdues for the second overdue period.
Lending Overdue 3 - The email text used when sending out lending overdues for the third overdue period.
Lending Overdue Reminder - The email text used when sending out lending overdue reminders.
Lending Password Reset - The email used when a lending user requests a password reset.
ILLiad 8.6 Default Doc Del E-mails

**Doc Del Cancellation Article** - The email used when sending out the document delivery article cancellation email.

**Doc Del Cancellation Loan** - The email used when sending out the document delivery loan cancellation email.

**Doc Del Electronic Delivery** - The email used when sending out the document delivery electronic delivery notification email.

**ILL Doc Del Article Delivery** - The notification email text used for Doc Del articles delivered to customers.

**ILL Doc Del Article Pickup** - The notification email text used for Doc Del articles available for customer pickup.

**ILL Doc Del Loan Delivery** - The notification email text used for Doc Del loans delivered to customers.

**ILL Doc Del Loan Pickup** - The notification email text used for Doc Del loans available for customer pickup.

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

E-mail Templates submitted to IDS Project in the Workflow Toolkit:
http://toolkit.idsproject.org/emailtemplates.aspx
Dear <#FirstName> <#LastName>

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

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

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

-The ILL Office

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

Hello <#LendingLibrary>,

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

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

Thanks for your help.

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

Interlibrary loan item #<#ILLNumber>:

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

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

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

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

Thank you.

-------------------------------------
<#BorrowingContactName>, Interlibrary Loan
<#LibraryName>
<#GeneralEmailAddress>
<#BorrowingPhone>
<#BorrowingHours>
http://toolkit.idsproject.org/emailtemplates/from_user_groups/Lending_Invoic e_Lost_Material.txt

-------------------------------------

Dear <#LendingLibrary> ILL,

This message is in regards to the following ILL request:

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

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

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

http://toolkit.idsproject.org/emailtemplates/from_user_groups/Lending_Unable_to_Ship.txt
Hi, Sally
Ejournals indicates that the following article is available, but we cannot locate it.

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

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

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

ILLiad Transaction Number: <#TransactionNumber>

If you have any questions, contact us at:

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

Marianne,

We received the following request:

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

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

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

Thank you!!!

Access Services Staff

http://toolkit.idspostproject.org/emailtemplates/from_user_groups/Serials_Holding_Error.txt
Video: How to move e-mails before upgrade

https://goo.gl/V384n9
Note: This section was blank including the Subject line on all the e-mails I created before upgrading!

Dear <#User.FirstName>,

We received your request for:

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

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

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

Thank you,

Jennifer Acker
518-629-7387
ill@hvcc.edu
SMS Message Example

https://prometheus.atlas-sys.com/display/illiad/Text+Message+Templates
ILLiad 8.6 Default SMS/Text messages

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

Note: SMS/Text messages will not work for lending

https://prometheus.atlas-sys.com/display/illiad/Text+Message+Templates
Sandbox: Email Template Creation
Email Templates discussion

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

Thank you to Atlas Systems!
Email Routing Rules

- [Partially automate] organization and tracking using emails/queues
- Process is same for both 8.5 and 8.6
Do I Need a Rule?

- Do you find yourself sending the same email over and over?
- Do you want to keep track of those requests?
- Do you want to group requests in a queue related to an email?
Do I Need a Rule...(cont’d)?

● Then yes, email routing is for you

● To make a rule work you need three things:
  ○ Email template to use
    ■ (Covered before lunch)
  ○ Queue to move requests to/from
  ○ Email routing rule
How does Email Routing Work?

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

Poof! With Email Routing, one step takes care of two tasks!
How does Email Routing Work? (pt. 2)

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

Good when you have a lot to send out and don’t need to edit the emails before sending.
How does Email Routing Work? (pt.3)

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

● Sometimes you’ll want to group requests in a queue that doesn’t exist

● To create a queue:
  ○ Customization Manager -> System -> Custom Queues -> Custom Queues
Creating Queues

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

● You will need to enter it exactly as written here in the routing rule
● Unless you’re on 8.6 already, your patrons can see the name of the queue in tracking
  ○ In 8.6 you can assign aliases to queues patrons can see
Check that email exists or create one

Go to the Email Templates tab in the Customization Manager

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

Once you find the Email Template, copy the name
Create an Email

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

● Right click in email to find a field name
Creating a rule

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

Choose New Record to create one.
Creating a rule pt 2

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

- Paste name of the email here

- Status the record is in after you send the email
Dear Sandy,

While looking up the following citation:

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

We have noticed the following error in the catalog:

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

Description of the error:
# Invoice Request

<table>
<thead>
<tr>
<th>ProcessType</th>
<th>Borrowing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Overdue Invoice request</td>
</tr>
<tr>
<td>DefaultToAddress</td>
<td>(paste lend lib's email here)</td>
</tr>
<tr>
<td>DefaultToName</td>
<td></td>
</tr>
<tr>
<td>DefaultCCAddress</td>
<td></td>
</tr>
<tr>
<td>DefaultSubject</td>
<td>Interlibrary Loan Replacement Charges</td>
</tr>
<tr>
<td>DefaultFromAddress</td>
<td><a href="mailto:mperez@binghamton.edu">mperez@binghamton.edu</a></td>
</tr>
<tr>
<td>DefaultFromName</td>
<td>Binghamton University ILL Office</td>
</tr>
<tr>
<td>DefaultStatus</td>
<td>Checked Out to Customer</td>
</tr>
<tr>
<td>FileNameLoan</td>
<td>invoice_request</td>
</tr>
<tr>
<td>FileNameArticle</td>
<td></td>
</tr>
<tr>
<td>NVTGC</td>
<td>ILL</td>
</tr>
</tbody>
</table>

**Email**

Hello,

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

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

Can you please send us an invoice?
Invoice sent to patron

Email

Dear <#FirstName> <#LastName>,

The lending library has issued replacement charges for the following <#DocumentType> you borrowed that is now overdue.

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

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

Replacement cost: $
Processing fee: $
Total: $

Rules

<table>
<thead>
<tr>
<th>ProcessType</th>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Overdue Invoice Notification</td>
</tr>
<tr>
<td>DefaultToAddress</td>
<td>Urgent ILL item Overdue - Bill</td>
</tr>
<tr>
<td>DefaultToName</td>
<td>Binghamton University ILL Office</td>
</tr>
<tr>
<td>DefaultCCAddress</td>
<td>Checked Out to Customer</td>
</tr>
<tr>
<td>DefaultSubject</td>
<td>overdue_bill</td>
</tr>
<tr>
<td>DefaultFromAddress</td>
<td><a href="mailto:mainill@binghamton.edu">mainill@binghamton.edu</a></td>
</tr>
<tr>
<td>DefaultFromName</td>
<td>Binghamton University ILL Office</td>
</tr>
<tr>
<td>FileNameLoan</td>
<td>ILL</td>
</tr>
</tbody>
</table>
Question for a Patron

Queue

<table>
<thead>
<tr>
<th>QueueName</th>
<th>Awaiting Clarification or Reply</th>
</tr>
</thead>
<tbody>
<tr>
<td>ProcessType</td>
<td>Borrowing</td>
</tr>
</tbody>
</table>

Rule

<table>
<thead>
<tr>
<th>ProcessType</th>
<th>Borrowing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Awaiting Clarification or Reply</td>
</tr>
<tr>
<td>DefaultToAddress</td>
<td></td>
</tr>
<tr>
<td>DefaultToName</td>
<td></td>
</tr>
<tr>
<td>DefaultCCAddress</td>
<td></td>
</tr>
<tr>
<td>DefaultSubject</td>
<td>Question about your interlibrary loan request</td>
</tr>
<tr>
<td>DefaultFromAddress</td>
<td><a href="mailto:library@sunymaritime.edu">library@sunymaritime.edu</a></td>
</tr>
<tr>
<td>DefaultFromName</td>
<td>SUNY Maritime ILL Department</td>
</tr>
<tr>
<td>DefaultStatus</td>
<td>Awaiting Clarification or Reply</td>
</tr>
<tr>
<td>LoanTemplate</td>
<td>borrowingquestion</td>
</tr>
<tr>
<td>ArticleTemplate</td>
<td>borrowingquestion</td>
</tr>
<tr>
<td>NVTGC</td>
<td>ILL</td>
</tr>
</tbody>
</table>

Email

Template Details

| Name:          | borrowingquestion |
| Description:   | General Question Email |

E-mail

From Name: <#LocalInfo.SystemName>  From Address: library@sunymaritime.edu
To Name:                To Address:                
CC Address:             BCC Address:               
Subject: Question about your recent interlibrary loan request

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

SUNY Maritime College InterLibrary Loan
Email Acquisitions/Collection Dev.

Email Queue Rule

Template Details
Name: forpurchase_staff
Description: Request to purchase item for Acq Staff

Queue
QueueName: Requested for Purchase
ProcessType: Borrowing
NVTGC: ILL

Rule
ProcessType: Request for Purchase
Name: libacq@sunymaritime.edu
DefaultToAddress: [Your Acq/CD Person]
DefaultFromAddress: library@sunymaritime.edu
DefaultToName: ILL Department
DefaultFromName: ILL Department
DefaultStatus: Requested for Purchase
LoanTemplate: forpurchase_staff
ArticleTemplate: ILL

Email
From Name: <#LocalInfo.SystemName>
To Name: libacq@sunymaritime.edu
CC Address: 
Subject: Request for purchase from ILL

Dear [Name of your Acquisitions Contact Person],
A patron has requested for us to borrow the following item, which we would like to be considered for purchase instead:

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

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

Thank you,
[ILL Department]
Email Routing Discussion

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

To let patrons know their renewal requests were approved or denied

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

Email

Rule
Borrowing Loan Renewal OK

This function:

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

You can configure for:

● Which email template to use (in the CM) and email subject
● Where to route after the message is sent: (Checked Out to Customer)
Borrowing Loan Renewal Denied

This function:

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

You can configure for:

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

You can configure for:

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

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

8.6 Upgrade Impact

«IT WILL AFFECT YOUR PRINT TEMPLATES»

HOW ARE THEY AFFECTED?
Addresses printed on Lending and Borrowing templates are now pulled from:
- The ShippingAddresses table (which contains OCLC constant data)
- NOT
- The LenderAddresses table.

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

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

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

and field names for addresses in your Maintenance Address Form have been renamed:
Example: LA_LibraryName, LA_Address1, etc
What?! Why?!

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

And...to mess up your customized labels (ELD)
Multiple Addresses Example

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

Please IDS, just tell me what to do......
Be Nice: Update Your Constant Data

1) In ILLiad
2) Or WorldShare

Before This Happens:

ILL/Nazareth College/Lorette Wilmot Library/4245 East Avenue/Rochester/NY/14618
1. System
2. Resource Sharing Settings
3. Constant Data
4. CD Name (dropdown)
5. Fields you need to Edit
6. Save!
In WorldShare

Don’t know yours? Find these keys in the CM:
OCLCILLAuthorization
OCLCILLPassword
Choose the CDR to edit

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

Update this and the one below
you *customized* your shipping labels by indicating a shipping method in the Maintenance Address Forms?

Wait, you mean all that work for nothing?

Sorta, let’s talk about our options.
Is there another way to designate shipping method?

**YES**

**Texas Tech University Library ILL**
Dept.
Box 40002
18th & Boston
Lubbock, Texas 79409-0002
United States
Where’s Waldo?
I mean, the Print Templates!

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

Remember: your .xls files live in the currently logged in user’s local Documents folder under ILLiad\Print\
Identify which templates you use

Basically, any template you have an imported address on.
Beginning your “Smart” Template Customization

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

AND:
2. use a “hook”

NOTE:
Glen’s silent video:
https://www.youtube.com/watch?v=0vGXIBEC11g&feature=youtu.be&hd=1
How to Add the Delivery Methods

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

Instant delivery types!

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

Locate your ELD libraries to select the “ELD delivery” method.
1) Custom Search for ELDs
2) Group Maintenance Form
3) Using the ELD Roster
A few custom searches...
Print Templates

BEST PRACTICE!

Make a BACK-UP copy BEFORE messing with a template!
Video Tutorial

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

Glen Bogardus, thank you!
The “If... Then... Else…” toggle game

Deleted the info
What to fill in...

```plaintext
Field name: LenderAddresses_DefaultShippingMethodLoa
Comparison: Equal to
Compare to: ELD DELIVERY

Insert this text:
ELD Placeholder

Otherwise insert this text:
Other Placeholder
```
1) Highlight all and right <click>
2) <select> Toggle Field Codes
3) Your label will look similar
1) Highlight all and Copy/Paste below

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

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

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

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

NOTE: You could type this in
1) Again, reveal your **Toggle Field Codes**

```
<Next Record>
ILL
{IF {MERGEFIELD LenderAddresses_DefaultShippingMethodIDA} = "ELD Delivery" '{MERGEFIELD LenderAddress_Address1} '{MERGEFIELD LenderAddresses_LibraryName}'
```

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

**NOTE:** Again, you could type **Address1** replacing **LibraryName**
1) TIME SAVER: Highlight all and Copy/Paste THREE TIMES below.

1) Replace 1 with 2 for next Address lines
2) Replace 1 with 3 for next Address lines
3) Replace 1 with 4 for next Address lines
Preview results by clicking on Preview Results

Mailed under Section 135.14 Postal Manual
LIBRARIES MATERIALS

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

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

RETURN POSTAGE GUARANTEED

ILL Northwestern University Library
1970 Campus Drive
Evanston, Illinois 60208-2300
United States
Toggle Codes

If it worked:
1) SAVE
2) Copy/Paste edited address into the other address labels
3) Preview Results
4) Save
5) Working on a Copy? Remember to rename your file
Other categories for the DefaultShipping dropdown:

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

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

UPS to:
- Interlibrary Loan
- University of Idaho Library
- 875 Perimeter Drive MS 2357
- Moscow, Idaho 83844-2357
Lending Pull Slip that doubles as a Mailing Label

| Lending Pull Slip | A Borrowing Return label and a Thank You Return Slip Combo |

| Mailed under Section 135.14 Postal Manual LIBRARIES MATERIALS POSTMASTER: This panel may be inspected for postal inspection if necessary FROM: ILL: <LocalInfo_InstitutionName> <LocalInfo_BorrowingAddress> <LocalInfo_BorrowingCity> <LocalInfo_BorrowingState> <LocalInfo_BorrowingZip>

ReturnGraceGuaranteed

Thank you for lending us the following item:

Thank you for lending us the following item:

| LenderAddresses_LenderString2 | LenderAddresses_LenderString1 |
| LenderAddresses_Address1 | LenderAddresses_Address2 | LenderAddresses_Address3 | LenderAddresses_Address4 |

If there are any questions about this item, please give us a call at <LocalInfo_GeneralPhoneNumber> or email us at <LocalInfo_GeneralEMailAddress> |

| LenderAddresses_LenderString2 | LenderAddresses_LenderString1 |
| LenderAddresses_Address1 | LenderAddresses_Address2 | LenderAddresses_Address3 | LenderAddresses_Address4 |

| LenderAddresses_LenderString2 | LenderAddresses_LenderString1 |
| LenderAddresses_Address1 | LenderAddresses_Address2 | LenderAddresses_Address3 | LenderAddresses_Address4 |

| LenderAddresses_LenderString2 | LenderAddresses_LenderString1 |
| LenderAddresses_Address1 | LenderAddresses_Address2 | LenderAddresses_Address3 | LenderAddresses_Address4 |

7/21/2015
Borrowing Book Band that doubles as a “return slip” and “thank you”
Other ILLiad 8.6 Surprises!
Article and Book Days to Respond
Display Status

<table>
<thead>
<tr>
<th>ID</th>
<th>NVTGC</th>
<th>ProcessType</th>
<th>TransactionStatus</th>
<th>WebDisplayStatus</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ILL</td>
<td>Borrowing</td>
<td>Request Sent</td>
<td>Request submitted to Lending Libraries</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Type</th>
<th>Title</th>
<th>Author</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>35191</td>
<td>Book</td>
<td>Uncivil seasons</td>
<td>Malone, Michael</td>
<td>Request submitted to Lending Libraries</td>
</tr>
</tbody>
</table>
Wrap up: Ideas for workshops?

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

What do you need help with?
Food Party!

EVERYTHING! (And a Pizza Party) tonight out at the Gazebo (6:00pm - 8:00pm)
Thank you to conference supporters!