



ILLiad

International Conference

A Stop Sign Really Does Mean Stop: How to Manage Alerts in ILLiad



ILLiad
International Conference

A Stop Sign Really Does Mean Stop

Thank you for joining me today!

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What Will We Talk About Today?

- Why do we get alerts?
- What types of alerts are there?
- How do we resolve alerts?
- How do we handle Special Messages?
- How do we avoid alerts?



Why Do We Get Alerts?

- The Stop Sign is an indication that you have an alert – something needs your attention
- Alerts are located in the lower right corner of the Main Menu of the ILLiad Client
- Number of reasons why it may show up
 - User error – on either end
 - Incorrect Settings
 - Network issues

Number
 User Information
 Citation Information

Search Requests

Search

Username
 Name
 ID

Search Users

Symbol
 Name
 Address

Search Addresses

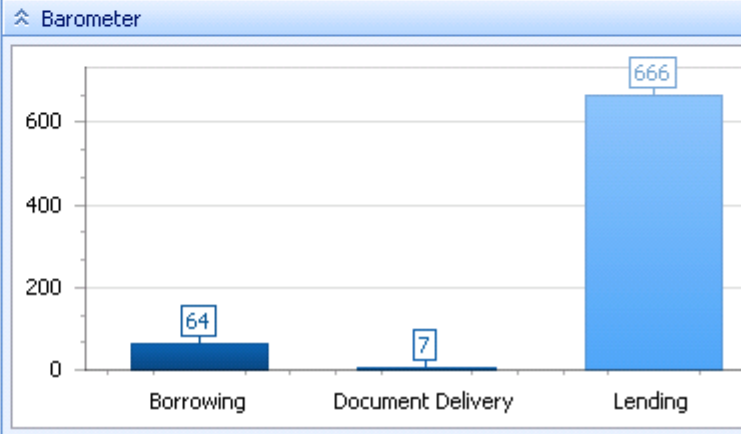
Main

Borrowing Document Delivery Lending

Requests (899 items)

Awaiting Lending Request Processing	604
In Stacks Searching	36
Request Finished	162
Cancelled by ILL Staff	27
Odyssey Sending Failed	4
Awaiting Renewal Request Processing	2
Awaiting Conditional Request Processing	1
Item Shipped	43
Request Conditionalized	1
Awaiting Renewal OK Processing	1
Awaiting Lending Scanning	16
Awaiting Lending Overdue Resolution	1
Awaiting Article Exchange Notification	1

899



System

Alert	B	D	I
Connection Manager	18	0	7
Odyssey Manager	0	0	4
Outgoing E-Mail	177	0	8
Flagged Requests	19	0	0
Users To Clear	0	0	0

214 0 15



What Types of Alerts Are There?

- Connection Manager
 - Problem communicating with OCLC
- Odyssey Manager
- Outgoing E-Mail
- Flagged Requests
 - Usually a Lender Conflict
- ISO Alerts
- Users To Clear




How Do We Resolve Alerts?

•Connection Manager

- Double click on the Alert line
 - Errors will be grouped by type
- Double click on an entry
- Click on the error icon (in red) to clear the error
- Look at OCLC status, the request status, and the history
- Decide what action(s) should be taken, if any, to correct
- You can clear multiple errors by selecting one request in the grid, holding your shift key, and selecting another to highlight multiple requests – then click on Clear Selected Errors

Started 20140317 00:03:39
 Last Run 20140317 13:25:50
 Next Run 20140317 13:35:53
 Connection Manager Details


 Clear Selected Errors
 Transactions

Show Entries After 3/15/2014
 Log


 Export Log

Transactions Log

Transac...	Username	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...
------------	----------	--------------	-------------	------------	----------------	------------	-----------	--------------	---------------	---------------	---------------	---------------

Process Type: Borrowing (18 Errors)

Error: Received not allowed here (6 Errors)

223	max	Loan	Grisham, Jo...	The runawa...								
633	jrb	Article							American lib...	4	4	april
1028	johnbruns...	Loan	Rand, Ayn.	Atlas shrug...								
1030	johnbruns...	Loan	Brown, Dan...	Angels & de...								
1088	johnb2014	Loan	Grisham, Jo...	The runawa...								
1089	johnb2014	Loan	Brown, Dan...	Angels & de...								

Error: Record Not Found (12 Errors)

48	maxie	Article							Whole cat j...	3	3	march
68	johnb	Loan	Rand, Ayn.	Atlas shrug...								
166	johnb3	Article							American lib...	5	5	may
196	johnb4	Article							The whole ...	8	8	august
226	max	Article							American lib...	2	2	february
227	max	Loan	Rand, Ayn.	Atlas shrug...			1957		The whole ...	6	6	june
228	max	Article							Potato chip...	8	8	august
268	johnrb	Article							The whole ...	6	6	June
563	johnb	Article							Library & ar...	24	2	
644	jcella	Article							Pediatric de...	24	5	9
645	jcella	Article							Sage family...	26	3	8
720	johnb	Article							The whole ...	7	7	july

Process Type: Lending (72 Errors)



Connection Manager Error



Odyssey Manager Error



ISO Attention



Request Flag

Error Clearing

- Detail
- History
- OCLC
- Z39.50
- PubMed/Docline
- Google Search
- OCLC AE
- Powells
- Innovative Search
- NLM Web Form

General Request Information

Transaction Number	1088	<input type="radio"/> Article <input checked="" type="radio"/> Loan	
Username	johnb2014	Wanted By	
Transaction Date	3/16/2014 12:39 AM	Not Wanted After	04/13/2014
Delivery Method	Hold for Pickup	Site	
Service Level	Regular	Shipping Options	
Billing Account		Doc Type	Book

OCLC Information

ILL Number	113796536
OCLC Number	34208175
Lending String	TRNAB,TRNAB,TRNAB,TR
Lender	TRNAB 1
System ID	OCLC
OCLC Status	EXPIRED

Loan Info | Collections | Local Holdings | Imported Request | User | Copyright | Invoice

Title	The runaway jury /
Author	Grisham, John.
Publisher	
Place	
Date	
Edition	
Original Loan Author	john grisham
Original Loan Title	runaway jury

- Accept Alternate Edition
- Accept Non English
- Allow Copies?
- Copyright Already Paid?
- Allow Renewals?
- Library Use Only?
- Replacement Pages?
- Priority Shipping
- Ariel

Item Info 1

Item Information

Call Number	
Location	
Due Date	2/23/2014
Reason For Cancellation	
Item Num/Ref Num	
ISxN	
Special Instructions	
Max Cost/Pieces	

Date	Note	Type	Added By
2/12/2014 2:10 PM	test	User	johnb2014

Citation Information

Cited In	in training
Title	
Date	
Volume/Pages	



How Do We Resolve Alerts?

- **Odyssey Manager**

- Double click on the Alert line
- Double click on an entry
- Most should be e-mail problems
- Some may be server problems at other library

Started 20140206 09:54:26
Last Run 20140317 13:33:05
Next Run 20140317 13:34:05


Clear Selected Errors

Show Entries After 3/15/2014


Export Log

Transactions

Log

Transactions Log

Transactio...	Username	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...
---------------	----------	--------------	-------------	------------	----------------	------------	-----------	--------------	---------------	---------------	---------------	---------------

Process Type: Lending (4 Errors)

Error: Sending Failed (4 Errors)

369	Lending	Article							The whole ...	4	4	
568	Lending	Article							American lib...	8	8	
1009	Lending	Article							Journal of I...	5	5	
1013	Lending	Article							test	test	test	



Cancel Request



Conditionalize Request



Mark Found



Mark Found Scan Now



Route



Policies Directory



Resend Request



Billing



View



Send E-Mail



Print Request



Add to Print Queue



Print and Empty Queue



Pending Updates

Process

Routing

OCLC

Odyssey

Billing

Lender

Printing

System

Detail

History

OCLC

Z39.50

PubMed/Docline

Google Search

OCLC AE

Serials Solutions Search

Innovative Search

NLM Web Form

General Request Information

Transaction Number	<input type="text" value="1013"/>	<input checked="" type="radio"/> Article	<input type="radio"/> Loan
Username	<input type="text" value="Lending"/>	Service Type	<input type="text"/>
Transaction Date	<input type="text" value="3/17/2014 10:54 AM"/>	Not Wanted After	<input type="text" value="09/15/2013"/>
Delivery Method	<input type="text"/>	Site	<input type="text"/>
Service Level	<input type="text" value="Regular"/>	Shipping Options	<input type="text" value="Mail"/>
Billing Account	<input type="text"/>	Doc Type	<input type="text"/>

OCLC Information

ILL Number	<input type="text" value="107825968"/>
OCLC Number	<input type="text"/>
Lending String	<input type="text" value="*TRNAA, TRNAA, TRNAA"/>
Borrower	<input type="text" value="TRNAB"/> <input type="text" value="1"/>
System ID	<input type="text" value="OCLC"/> <input type="text" value="1"/>
OCLC Status	<input type="text" value="Record not found"/>

Journal Title	<input type="text" value="test"/>		
Volume/Issue	<input type="text" value="test"/>	<input type="text" value="test"/>	
Month/Year/Pages	<input type="text"/>	<input type="text" value="test 2000"/>	<input type="text" value="test"/>
Article Author	<input type="text" value="test"/>		
Article Title	<input type="text" value="test"/>		
Original Journal Title	<input type="text"/>		
Item Author/Publisher	<input type="text"/>	<input type="text"/>	
Item Place/Edition	<input type="text"/>	<input type="text"/>	

- Accept Alternate Edition
- Accept Non English
- Allow Copies?
- Copyright Already Paid?
- Allow Renewals?
- Library Use Only?
- Replacement Pages?
- Priority Shipping
- Ariel
- Odyssey (PDF Enabled)

Item Information

Call Number	<input type="text"/>
Location	<input type="text"/>
Due Date	<input type="text"/>
Reason For Cancellation	<input type="text"/>
Item Num/Ref Num	<input type="text"/>
ISxN	<input type="text" value="1133-0686"/>
Special Instructions	<input type="text"/>
Max Cost/Pieces	<input type="text" value="0.00"/>

Date	Note	Type	Added By
8/16/2013 5:35 PM	Billing Notes; This is a test account. Please do not fill.	System	System
8/16/2013 5:35 PM	Borrowing Notes; This is a test account. Please do not fill. (maxCost; free)	System	System

Citation Information

Cited In	<input type="text"/>
Title	<input type="text"/>
Date	<input type="text"/>
Volume/Pages	<input type="text"/>



How Do We Resolve Alerts?

- **Outgoing E-Mail**

- Double click on the Alert line
- List of failed e-mails will appear
- Cancel or Resend

May have to edit before sending if e-mail address is improperly formatted

				Last Failed Refresh	Last Pending Refresh
Cancel E-Mail	Resend E-Mail	Resend All E-Mails	Auto Refresh	3/17/2014 1:36:10 PM	3/17/2014 1:36:10 PM
Manage Outgoing E-Mail			Refresh		

Transaction	Date/Time	Type	Reference	To	Subject	Staff	Note
309	10/7/2011 1:18:2...	Transaction			Requested article has been...	atlas	System error: No connection could be...
0	11/10/2011 2:41:...	User			ILLiad New User Registratio...	atlas	System error: No connection could be...
635	11/11/2011 1:53:...	Transaction			Automated Interlibrary Loa...	atlas	System error: No connection could be...
633	11/11/2011 2:06:...	Transaction			Requested Item Delivered ...	Odyssey	System error: No connection could be...
634	11/11/2011 2:07:...	Transaction			Requested Item Delivered ...	Odyssey	System error: No connection could be...

From "Interlibrary Loan Office" <jbrunswick@atlas-sys.com>

To jbrunswick@atlas-sys.com

CC

BCC

Subject Requested article has been mailed

Dear john brunswick

An article that you had requested:

Article Title: testing
 Article Author: john brunswick
 Journal Title: Journal of forensic sciences.
 Journal Volume: 2
 Journal Year: 2002
 TN: 309


has been received and processed by the Interlibrary Loan Staff.
 As per your instructions to ILLiad regarding your preferred article
 delivery method, it is now in transit to you via mail at the
 following address:

john brunswick
 123 main
 suite 2233
 virginia beach VA 23451



How Do We Resolve Alerts?

- Flagged Requests
 - Double click on the Alert line
 - Double click on an entry
 - Look at history
 - May have to contact other library


Clear Selected Errors
Transactions

Process Type ▲ | Flag Type ▲ | Flag Note ▲

Transaction N...	Username	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo
------------------	----------	--------------	-------------	------------	----------------	------------	-----------	--------------	---------------	---------------	---------------	-------

[-] Flag Note: Lender Conflict

48	maxie	Article							Whole cat j...	3	3	march
50	johnb	Article							Journal of a...	6	4	10
57	fredfunk	Loan	michael moore	dude where...								
58	fredfunk	Article							The whole ...	4	4	april
61	fredfunk	Loan	Rey, Margret.	Curious Ge...	Houghton ...	Boston	1958					
67	johnb	Article							Potato chip...	5	5	may
81	johnb	Article							The whole ...	3	3	march
87	johnb2	Loan	Grisham, Jo...	The runawa...								
89	johnb2	Article							The whole ...	5	5	may
90	johnb2	Article							Potato chip...	7	7	july
92	johnb2	Article							American lib...	6	6	june
166	johnb3	Article							American lib...	5	5	may
268	johnrb	Article							The whole ...	6	6	June
269	johnrb	Article							Potato chip...	7	7	july
633	jrb	Article							American lib...	4	4	april
634	jrb	Article							The whole ...	6	6	june
725	johnb	Article							The whole ...	2	22	Februa
863	johnb	Article							Niles' nation...			

[-] Flag Note: Status Conflict

458	johnb	Loan	Mitchell, Ma...	Gone with t...								
-----	-------	------	-----------------	----------------	--	--	--	--	--	--	--	--



How Do We Resolve Alerts?

•ISO Alerts

- Double click on the Alert line
- Double click on an entry
- Look at history
- May have to contact other library



How Do We Handle Special Messages?

- Go to System Ribbon, Search/Review Statuses
 - Special Messages Borrower
Received?, Overdue
 - Special Messages Lender
Complete?, Not Received
 - Review and Resolve

ILL/ID Number

 Search

Search

Status	Count
Alert	0
Borrower Returned	0
Conditional	0
Conditional Pending	0
Direct Delivered	0
Direct Produced	0
Expired	5
In Process	7
Lender Direct Delivered	0
Lender Shipped	2
No Renewal	1
Online Produced	3
Pending	0
Recalled	0
Received	1
Renewal Ok	1
Renewal Request	0
Retry	0
Retry Pending	0
Returned	8
Review	0
Review In Process	0
Save	0
Shipped	0
Special Messages Borrower	71
Special Messages Lender	8

Drag a column header here to group by that column

ID/ILLNumber	Transaction Num...	Status	Title	Additional Information	Verified
--------------	--------------------	--------	-------	------------------------	----------

ILL/ID Number Search

Search

Status	Count
Alert	0
Borrower Returned	0
Conditional	0
Conditional Pending	0
Direct Delivered	0
Direct Produced	0
Expired	5
In Process	7
Lender Direct Delivered	0
Lender Shipped	2
No Renewal	1
Online Produced	3
Pending	0
Recalled	0
Received	1
Renewal Ok	1
Renewal Request	0
Retry	0
Retry Pending	0
Returned	8
Review	0
Review In Process	0
Save	0
Shipped	0
Special Messages Borrower	71
Special Messages Lender	8

Problem Status

ID/ILLNumber	Transaction Num...	Status	Title	Additional Information	Verified
+ Problem Status: BORROWER_OVERDUE					
- Problem Status: BORROWER_RECEIVED					
108245099		SHIPPED	Owl moon /	Lender: TRNAB Patron: ILLiad User Due Date: 20131001	WorldCat Desc: [32] p Type: Book
108514784	8604	SHIPPED	Journal of cardiovascu...	Lender: TRNAB Patron: ILLiad User Black, Heather Due Date: N/A	<TN:8604><ODYSSEY... 216.54.57.237/WOLFP NG>< test> OCLC
108514792	8846	SHIPPED	Thermal engineering	Lender: TRNAB Patron: ILLiad User Black, Heather Due Date: N/A	<TN:8846><ODYSSEY... 216.54.57.237/WOLFP NG>< test> OCLC
108514956	8574	SHIPPED	Journal of macromark...	Lender: TRNAB Patron: ILLiad User Black, Heather Due Date: N/A	<TN:8574><ODYSSEY... 216.54.57.237/WOLFP NG>< test> OCLC
108827271	6	SHIPPED	Publication manual of t...	Lender: JFU Patron: ILLiad User test, Due Date: 20131018	<TN:6><ODYSSEY:ga alpha.cloudapp.net/AD IN> OCLC
108827532	7	SHIPPED	JAMA : the journal of ...	Lender: JFU Patron: ILLiad User test, Due Date: 20131018	<TN:7><ODYSSEY:ga alpha.cloudapp.net/AD IN> OCLC
109216533	9210	SHIPPED	Genes to cells.	Lender: YSM Patron: ILLiad User spires, stephanie Due Date: N/A	<TN:9210><ODYSSEY... 216.54.57.237/WOLFP NG>< test> OCLC
109265969		SHIPPED	The Musical quarterly.	Lender: TRNAB Patron: ILLiad User Due Date: N/A	ArticleFirst Type: a
				Lender: TRNAB	ArticleFirst Type: a



How Do We Avoid Alerts?

- Review your workflow
- Check your queues
- Keep up on your Overdues and Special Messages
- Keep up on your Alerts



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ILLiad 8.4 Documentation

- ILLiad User Guide, ILLiad Client Basics, System Logs and Alerts



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Questions?



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Thank You

