



The College at
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Customizing your ILLiad Printables

Logan Rath, MS, MLS

Agenda

1. Around the Room
2. What & Why
3. Information Design 101
4. Break and a Task
5. Applying ID
6. Tour of Templates
7. How to Update your templates
8. Open Lab



Around the Room

So that I can customize this workshop, let's learn a little bit about who we all are.

Name

**How customized
are you?**

Institution

**What do you
want from this?**



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Logan Rath, MS, MLS

Resource Sharing Librarian

Instruction Librarian

Reference Librarian

Library Web Designer

Degrees:



University at Buffalo
The State University of New York



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ILLiad Printables – WHAT?

- A “printable” is anything you print in the course of your day. This includes, but is not limited to:
 - Labels
 - Pull slips
 - Receives
 - Forms
 - Request Information
 - Spreadsheets



Why customize?

- Branding & Marketing
- Workflow Improvements
- Decluttering
- New Services



Looks Matter

Marketing & Branding

The act of *connecting customers to specific promises of value.*

Internal: People. Knowledge. Experience.

External: Benefits over Features



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Information Design 101

Typeface

weight

Color

size

Layout

Shading



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Typeface

Times New Roman is serif.

Arial is sans-serif.



Arial

Segoe UI

Calibri

Verdana

Century Gothic

Open Sans

Corbel

Candara

Trebuchet MS

Times New Roman

Cambria

Georgia

Book Antiqua

Garamond

Chaparral Pro

High Tower Text

Elephant

Bookman



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Font Size

UNIMPORTANT

This is really useful information.



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Font Weight

Title: Journal of Anthropology

Title: Journal of Anthropology



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Color

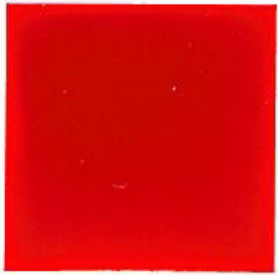
Colors are nice,
but too many can
be a problem.



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OSHA Safety Colors

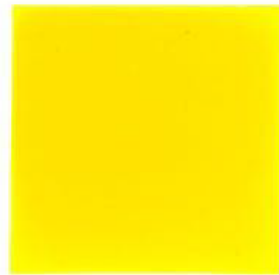
(ANSI Z53.1 - 1979)



**RD-2 OSHA
Safety Red**



**OR-2 OSHA
Safety Orange**



**YE-3 OSHA
Safety Yellow**



**GN-6 OSHA
Safety Green**



**BL-6 OSHA
Safety Blue**



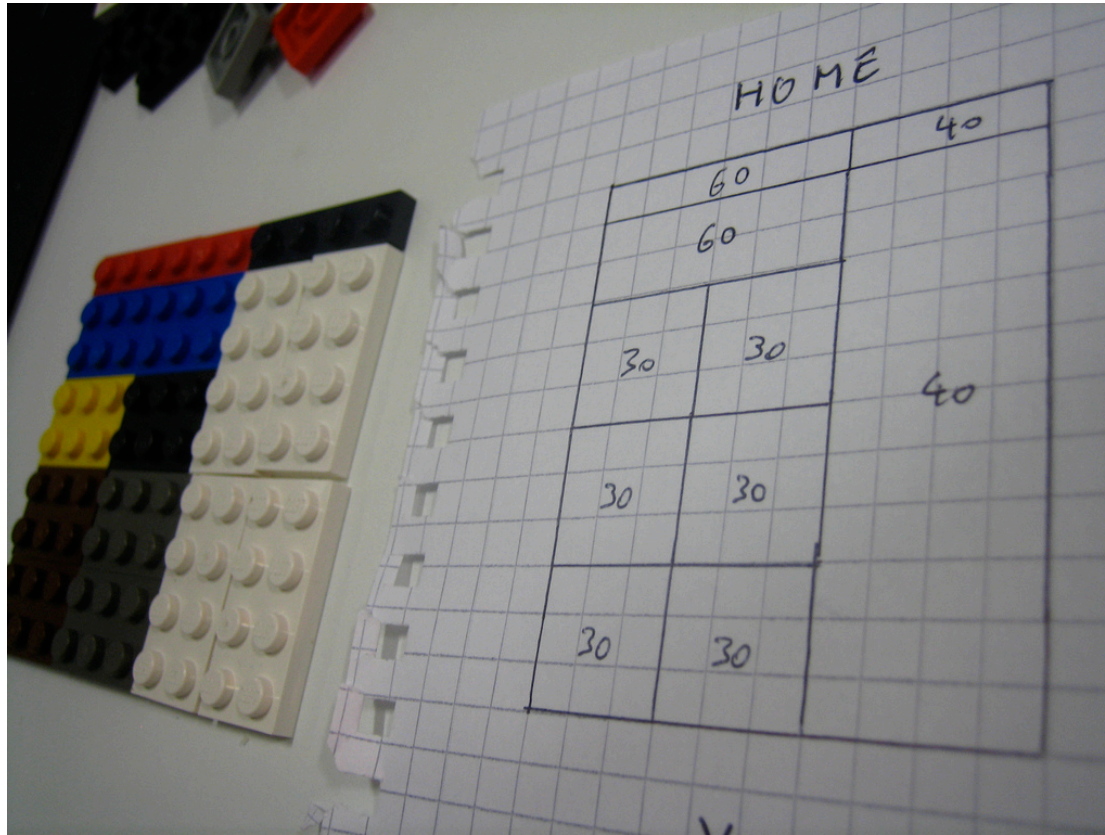
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Shading

Wxyz	Wxyz	Wxyz
Wxyz	Wxyz	Wxyz
Wxyz	Wxyz	Wxyz



Layout



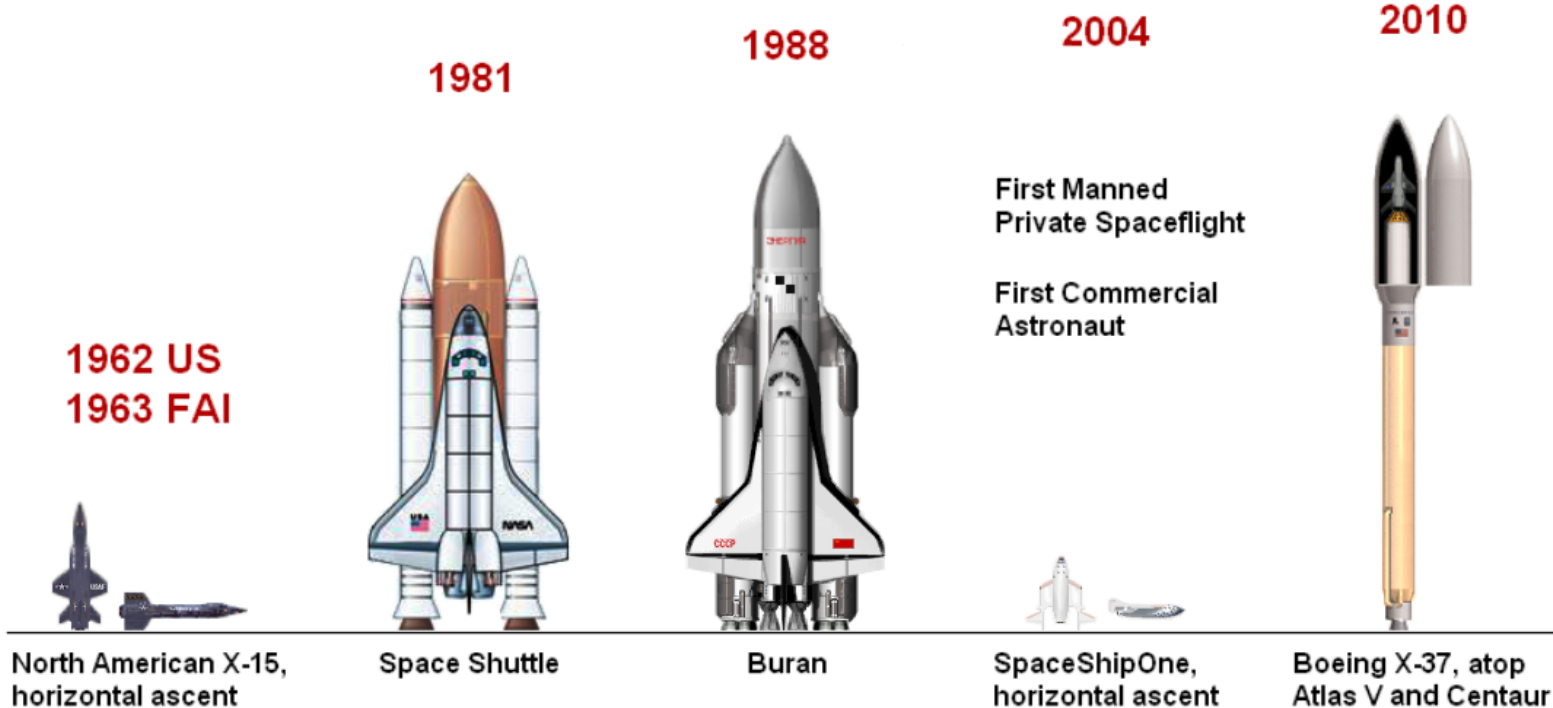
[Flickr: Jeremy Keith](#)



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Whitespace

First Spaceplanes



[Image from Wikipedia](#)



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Your Turn

Typeface

weight

Color

size

Layout

Shading



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Applying ID to Printables

- Examine
- Declutter
- Fix
- Repeat



Necessary Documentation

- [Customizing Printer Templates](#)
 - Chart matches XLS to DOC
- [Key ILLiad Data Tables](#)
 - Transactions, Users, LenderAddresses



Template Magic

If...Then...Else...

is your biggest weapon.



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Cheat with a Custom Search

ISSN	ILL Number	ESP Number	Lending String
	100791429	40345486	*YUS,YUS
	108693282	13479277	*IND,RBN
978250304...	108693293	33378980	SYB,*BNG,NYP,YHM
	108693361	1473396	BNG,*BUF,NYP,SYB
978082044...	108996516	39182251	*RRR,NYP,NAM,VVC,V...

Library Use Only	Allow Phot...	Lending Library
No	Yes	YUS
No	Yes	RBN
No	Yes	BNG
No	Yes	BUF
No	Yes	RRR



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TOUR OF TEMPLATES



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Lending Loan Labels

XBM (Brockport) Interlibrary Loan

XBM #: 229787



D210 .I45 2007 Books (Top Floor) Available

Imperial formations / Stoler, Ann Laura.

Patron Georger, Jeff

Due 5/8/2013

ILL# 101868622



ELD HUB: ALB

YPM - SUNY PLATTSBURGH

Feinburg Library, ILL
2 Draper Avenue Plattsburgh, NY 12901-2628

XBM (Brockport) Interlibrary Loan

XBM #: 229799



DC33.2 .B59 1998 Books (Top Floor) Available

Strong of body, brave and noble ; chivalry and society
in medieval France /

Bouchard, Constance Brittain.

Patron Smith, Casey

Due 5/8/2013

ILL# 101873975



RVA - Roberts Wesleyan College

Library ILL
2301 Westside Dr Rochester, NY 14624

RRLC



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Article Pull Slips

3/14/2013 5:45 PM
ILL Lending Request

Title: **American journal of recreation therapy.**

Date: 6 2012

Article: Care staff experiences of facilitating person-centered care and resident involvement through the use of individualized music in dementia care.

Vol: 11
No: 2
Pgs: 39

Borrower: BUF EXEMPT University at Buffalo Libraries String: *XBM,XIM,YDK,VVW,VYL

FILE NAME: 229805



XBM TN: 229805
ILL: 101875865



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Borrowing Receives

This item must remain in the library. Please return it when finished. Failure to keep this item in the library will result in revocation of Interlibrary Loan privileges.

PLACE ON HOLD SHELF
ILL-156563-5/23/2010

Rath, Logan

INTERLIBRARY LOAN

TN#:  156563

Ambient findability Morville, Peter

Due: 5/23/2010

METROCENTER DELIVERY

MCR-228513-4/25/2013

1. Open Transaction in ILLiad
2. Send Email: MetroCenter Delivery
3. Send to MetroCenter

Page, Turner

INTERLIBRARY LOAN

101429085
ILL#: 

The complete guide to transgender in the workplace / Sheridan, Vanessa, 1949-

Due: 4/25/2013



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Doc Del Loan Slips

Document Delivery Item Request

PLACE ON HOLD SHELF

(ILL) XBM#: 229654

Robinson, Alex 3/12/2013



DRAKE LIBRARY ITEM

Title: Fed up! : winning the war against
childhood obesity / Susan Okie.

Author:

**CHECK OUT WITH SUNY
CARD**

Call Number: **RJ399.C6 O383 2005**
Books (Top Floor) Available

Date Received: _____



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YGM Transaction Number:

LENDING – ARTICLE



947309

Deliver via: **Odyssey**

Call Number: **Fraser**

Location:

Tetrahedron

Volume: **39** | Issue: **19**

Year: **1983**

Article Information

T. Połoński; Optical activity of lactones and lactams—II ; Chiroptical properties of 4-oxazolidinones

Pages: 3139-3143

Borrowing Library Information

ILL Number:



92505651

Deliver to: ZGM

Mina Rees Library -- ILL Dept.

Email: ill@gc.cuny.edu

Provided by:

Milne Library, SUNY Geneseo (YGM)

Phone: 585-245-5589 | **Fax:** 585-245-5003

Email: ids@geneseo.edu

YGM Transaction Number:

LENDING – LOAN (YJJ)



946066

Call Number: **F208.2 .M98 2010**

Location: **Upper Level Available**

The myth of southern exceptionalism /

Author: Lassiter, Matthew D.; Crespino, Joseph.

Return this item to:

Milne Library, SUNY Geneseo (YGM)

1 College Circle

Geneseo, NY 14454

Phone: 585-245-5589 | **Fax:** 585-245-5003

Email: ids@geneseo.edu

Borrowing Library Information:

ILL Number:



91819664

Due Date: 9/11/2012 | **Renewals:** Yes

Loaned to: YJJ | **Pieces:** 1

Shipping Label

Information Delivery Services - 860405
Milne Library, SUNY Geneseo
1 College Circle
Geneseo, NY 14454

Ship to:

Montante Family Library -- ILL Dept.
D'Youville College
320 Porter Avenue
Buffalo, NY. 14201
**



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Goodread,
Ima

Due: 3/19/2012

TN:333831



Title: Le rendez-vous de chasse : for horn solo /
Author: Rossini, Gioacchino, 1792-1868.
Pieces: 1

INSTRUCTIONS:

DO NOT REMOVE BAND

NO RENEWALS

Should the Library buy a copy of this book? YES/NO

Was this ILL helpful? YES/NO

ILL OFFICE HOURS:

Mon-Fri 8am-5pm, Sat 8:30am-5pm, Sun 10am-5pm
nazill@naz.edu (585) 389-2184
http://www.naz.edu/dept/library

JAMES MADISON UNIV LIBRARY
CARRIER LIBRARY - ILL
800 S MAIN STREET MAIL STOP 1704
HARRISONBURG VA 22807

Thank you VMC!

ILL #: 86347471



Naz Borrowing Receives

Greater Flexibility

- Info from Lending table can be imported into Borrowing templates.



Let's see more options



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EDIT YOUR TEMPLATES



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Getting Started

1) Find your templates

The screenshot displays the ILLiad configuration interface. On the left is a tree view of system components, with 'PrintDocumentsPath' selected. The main window shows the configuration for 'PrintDocumentsPath'.

PrintDocumentsPath ILL

Settings

Key Value
N:\ILLiad\Print

Description
Default path for Word documents (for auto-opening). This can be a local path (the same for all workstations) or a UNC path. If blank, ILLiad defaults to using the print folder where the ILLiadClient.exe runs.

Value Changed From	Value Changed To	Changed Time	Changed By
J:\Print	N:\ILLiad\Print	11/17/2011 9:30 AM	lr
j:\Print	J:\Print	9/26/2011 8:50 AM	lr
c:\Program Files\Illiad\Print	j:\Print	9/26/2011 8:48 AM	lr
J:\Print\	c:\Program Files\Illiad\Print	9/26/2011 8:48 AM	lr
c:\TempPrint\	J:\Print\	4/27/2011 8:30 AM	kmyers
c:\Program Files\Illiad\Print\	c:\TempPrint\	4/22/2011 4:02 PM	kmyers
J:\Print\	c:\Program Files\Illiad\Print\	4/22/2011 4:02 PM	kmyers
c:\TempPrint\	J:\Print\	4/22/2011 3:57 PM	kmyers
c:\Program Files\Illiad\Print\	c:\TempPrint\	4/22/2011 12:43 PM	kmyers



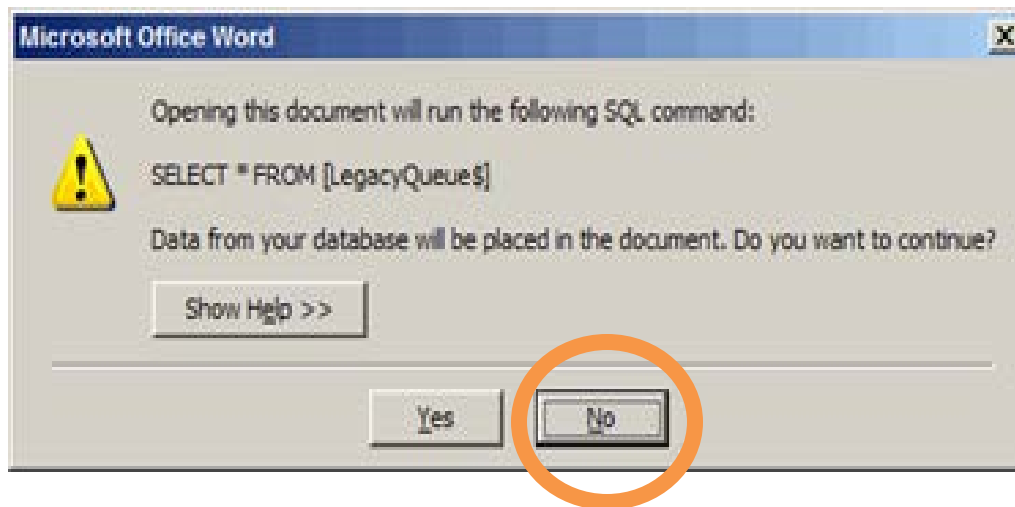
Just in case...

- 2) Backup your templates
- 3) Designate one to work on
- 4) Rename the original in the Print folder
- 5) Copy/paste your customized original into the Print folder
- 6) Now, open your template...



Still using LegacyQueue\$?

If you receive the message below, please note that the newer templates run on "PrintQueue\$" not "LegacyQueue\$".



Microsoft Office Word

LendingArticleSlips.d
data source, C:\ILLI

Find
Select

Data Sour

Location:

Select Data Source

Look in: PrintA

Name	Size	Type	Date Modified
DocDelP.xls	37 KB	Microsoft Office Exc...	5/5/2011 12:48 PM
Loan.xls	40 KB	Microsoft Office Exc...	4/19/2011 2:58 PM
LOver1.xls	30 KB	Microsoft Office Exc...	12/23/2010 3:41 PM
LOver2.xls	37 KB	Microsoft Office Exc...	12/23/2010 3:41 PM
LOver3.xls	44 KB	Microsoft Office Exc...	12/23/2010 3:41 PM
LPrinted.xls	38 KB	Microsoft Office Exc...	6/15/2009 9:03 AM
Printed.xls	39 KB	Microsoft Office Exc...	11/10/2010 10:47 AM
PrintRequest.xls	40 KB	Microsoft Office Exc...	5/3/2011 1:01 PM
ReturnsL.xls	40 KB	Microsoft Office Exc...	5/6/2011 8:25 AM
ReturnsP.xls	35 KB	Microsoft Office Exc...	5/5/2011 9:03 AM
ShipLabel.xls	20 KB	Microsoft Office Exc...	4/11/2011 8:08 AM
ShpStk.xls	50 KB	Microsoft Office Exc...	4/27/2011 12:46 PM
ShpStk.xls	50 KB	Microsoft Office Exc...	4/27/2011 12:46 PM

Select Table

Name	Description	Modified	Created	Type
LegacyQueue\$		5/6/2011 12:08:21 PM	5/6/2011 12:08:21 PM	TABLE
PrintQueue\$		5/6/2011 12:08:21 PM	5/6/2011 12:08:21 PM	TABLE

First row of data contains column headers

OK Cancel

New Source...

*.xls

Open Cancel

New Source...

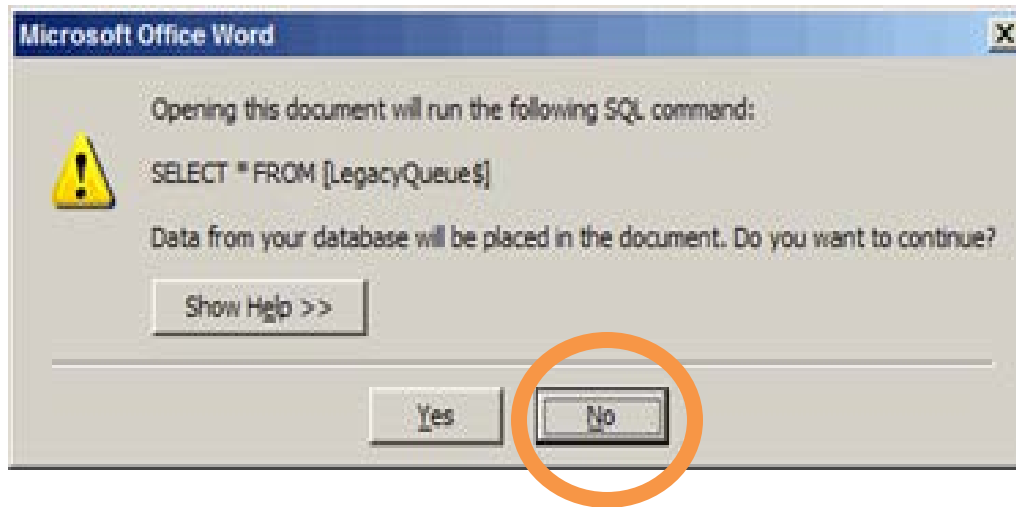
*.xls

Open Cancel

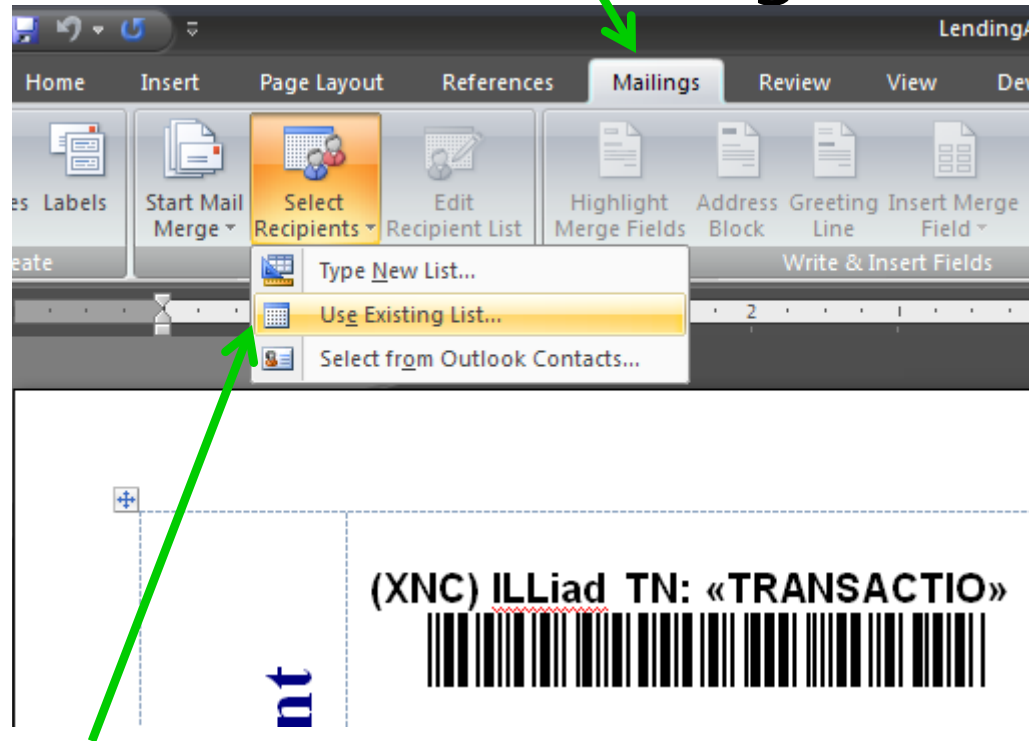


Remember, just say 'No'

Answer 'No'. [Your print template should open].



7) In Word click on the Mailings tab



8) Select Recipients | Use Existing List



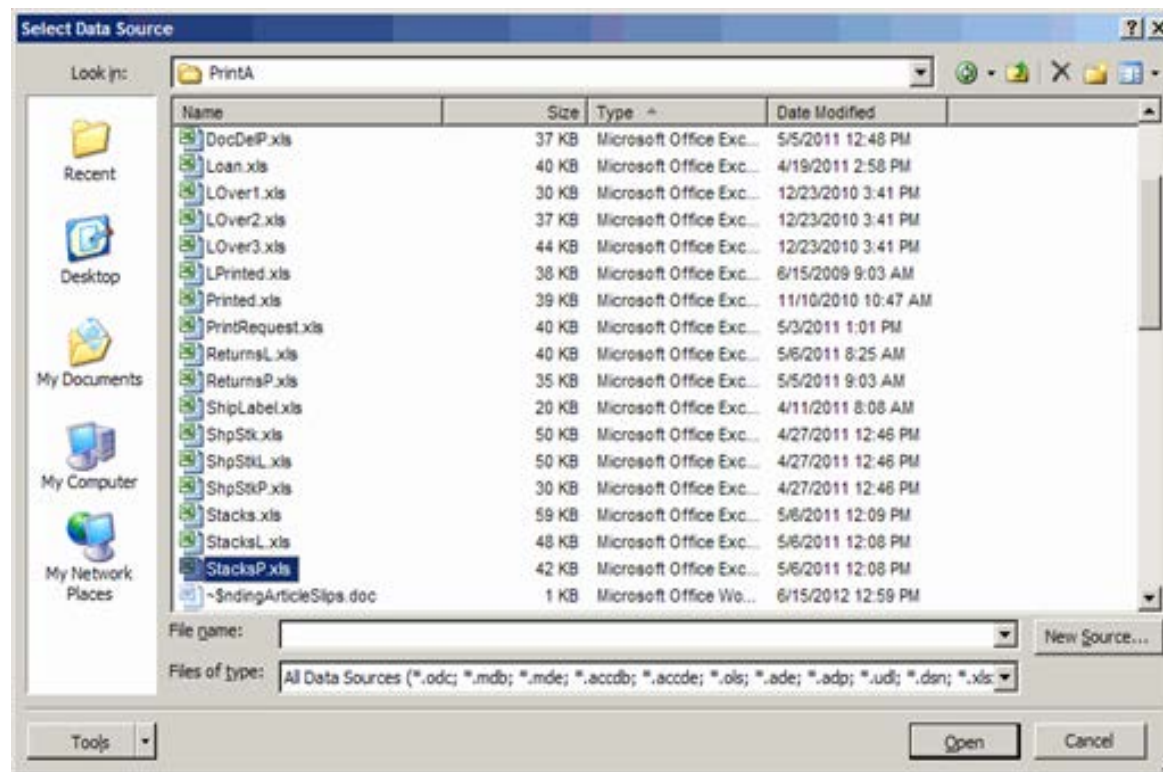
9) Now you will be locating and matching the corresponding Data File (or .xls file) to the Word template. Or Google - "ILLiad Print Templates"

Lending

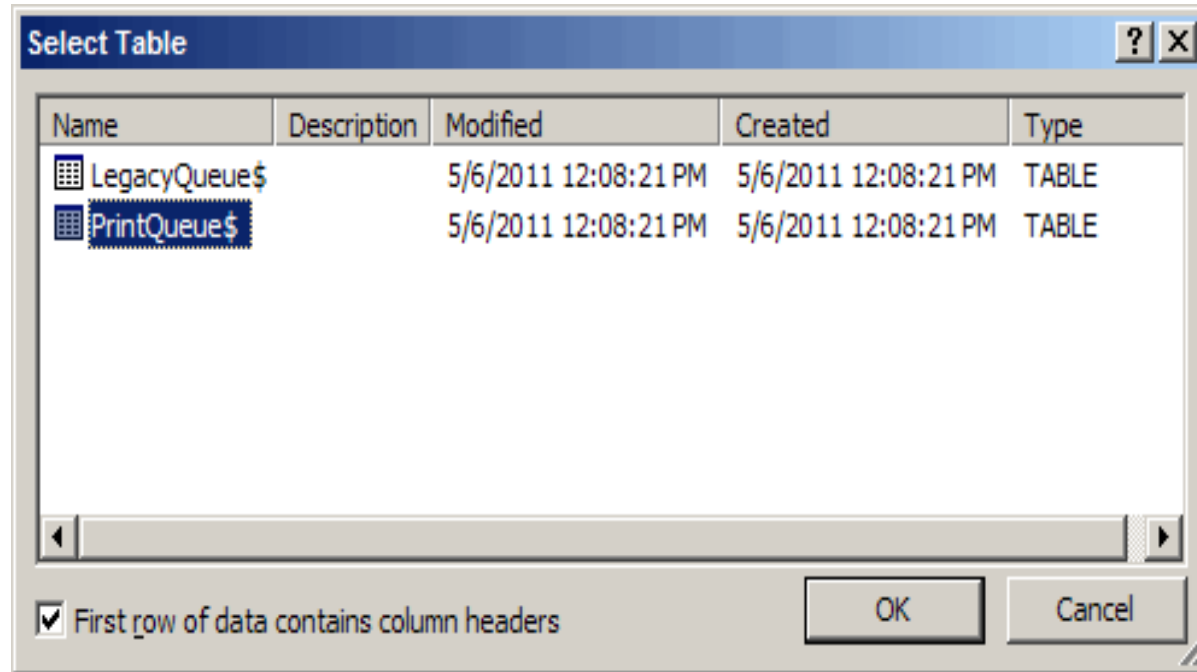
Print Process	From this Queue	Perform this Action	Merges with this Word Doc	Data File Used
Article Slips	Awaiting Stacks Searching	From Lending Ribbon (Search Stacks Group): Print Stacks Search Items	LendingArticleSlips.doc	StacksP.xls
Loan Slips	Awaiting Stacks Searching	From Lending Ribbon (Stacks Search Group): Print Stacks Search Items	LendingLoandSlips.doc	StacksL.xls
Loan Labels	Awaiting Stacks Searching	From Lending Ribbon (Search Stacks Group): Print Stacks Search Items	LendingLoanLabels.doc	StacksL.xls
Loan Shipping Labels	Awaiting Shipping Label Printing	From Lending Ribbon (Search Stacks Group): Print Shipping Labels	LendingLoanShippingLabels.doc	ShpStkL.xls
Article Shipping Labels	Awaiting Shipping Label Printing	From Lending Ribbon (Search Stacks Group): Print Shipping Labels	LendingArticleShippingLabels.doc	ShpStkP.xls



10) Navigate to the corresponding file located in you're **My Documents\ILLiad\Print** folder. The corresponding file for LendingArticleSlips is StacksP.xls

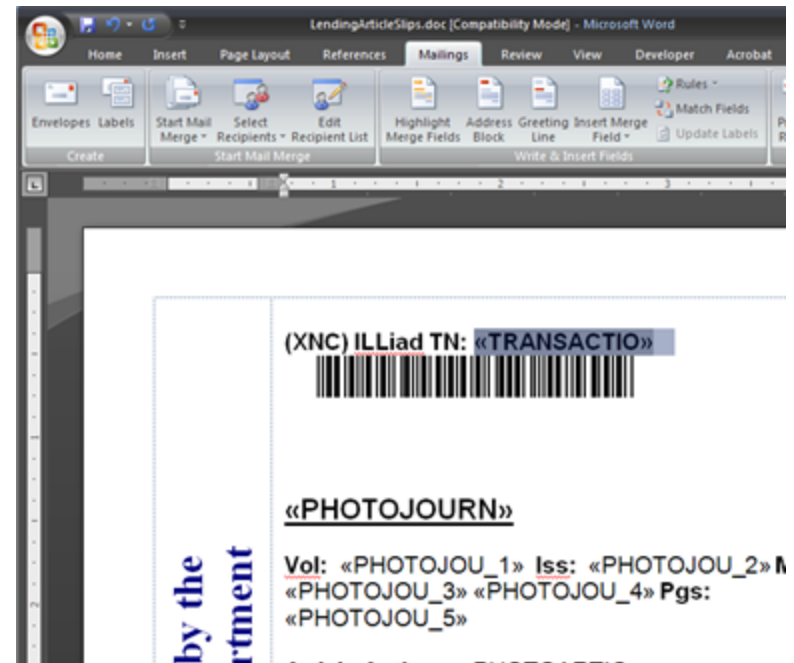


11) Now, select **PrintQueue\$** and click OK



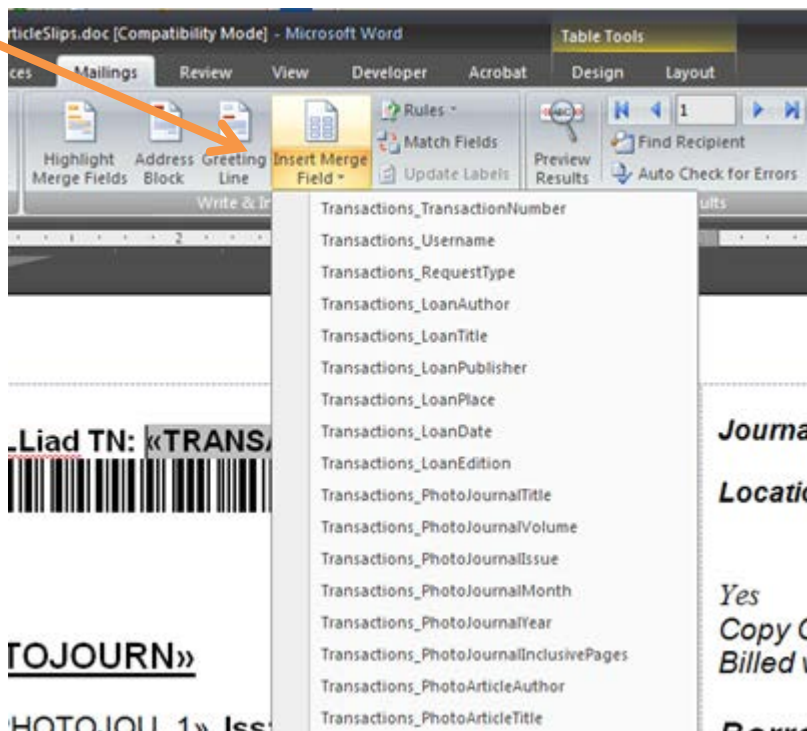
12) Your template will come up with the old **LegacyQueue\$** data (ex. <<Transactio>>)

13) Change your fields



14) Select **Insert Merge Field** and select the corresponding field name. In this case Transactions_TransactionNumber

15) **Save!**



Don't forget:

- **Hidden Toggle Codes** - If you have toggle codes ("if" and "then" merge fields), highlight the area where they reside and <right click> and select

INSTRUCTIONS:

DO NOT REMOVE BAND

```
{ IF Yes = "Yes" " { MERGEFIELD Transactions_SpecIns }" "" }  
{ IF { MERGEFIELD Transactions_RenewalsAllowed } = "No" "NO RENEWALS" "" }  
{ IF { MERGEFIELD Transactions_LibraryUseOnly } = "Yes" "LIBRARY USE ONLY" "" }  
{ IF { MERGEFIELD Transactions_RenewalsAllowed } = "Yes" "RENEWALS ALLOWED" "" }
```

TORENEW:

In your ILLiad ACCOUNT
under: *View/Checked Out Items*
locate TN: { MERGEFIELD Transactions_TransactionNumber } and then
<click> Renew.

For renewals on *due, overdue, or second renewal* items you must contact the ILL Staff either via email, phone, or by stopping in. "" }

INSTRUCTIONS:

DO NOT REMOVE BAND

RENEWALS ALLOWED

TORENEW:

In your ILLiad ACCOUNT
under: *View/Checked Out Items*
locate TN: 346656 and then <click> Renew.

For renewals on *due, overdue, or second renewal* items you must contact the ILL Staff either via email, phone, or by stopping in.

OVERDUE FINES ARE 50 CENTS PER DAY

Should the Library buy a copy of this book? YES/NO

Was this ILL helpful? YES/NO

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Barcodes

- **Getting your Barcodes to Print** – In plain text, your barcodes should read:
«Transactions_TransactionNumber»

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

TN:«Transactions_TransactionNumber»



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More Reading

- [ADA Standards for Accessible Design](#)
- [The Information Design Handbook](#)
- [Universal principles of design : 125 ways to enhance usability, influence perception, increase appeal, make better design decisions, and teach through design](#)



Open Lab

1. Pick a template to modify
2. Connect the correct XLS file
3. Go Edit Crazy
4. Preview Your Results / Finish the Merge

