Agenda

- Lending
  - PDF Lending workflow
    - Addons for OpenURL/A-Z lists
    - Article Exchange workflow
  - Deflections for embargo
  - OCLC Knowledge base
- Borrowing
  - Online Full Text Resource Addons
  - Document Providers
    - Basic Workflow
    - CCC Get-It-Now
  - OCLC Knowledgebase
  - Trusted Sender

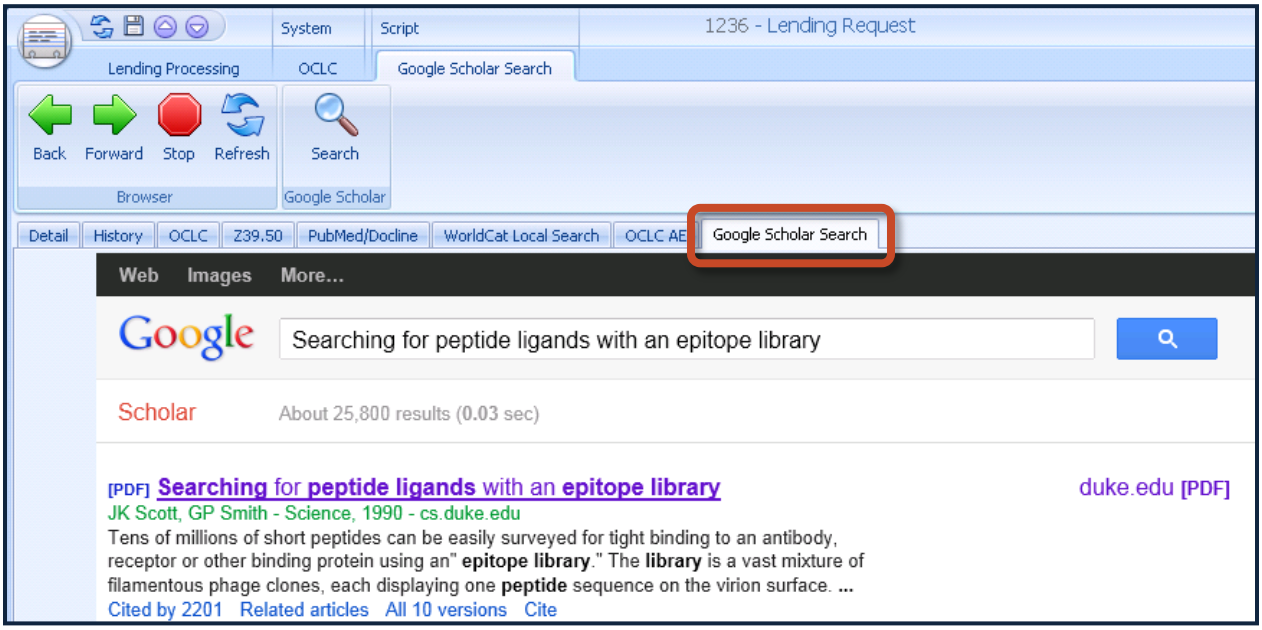
At the end of the session, you should have the ability to customize ILLiad workflows to support use of electronic resources.

Lending

- Negotiating for lending use from e-resources
- Improved workflows in versions 8.2 and higher
  - Use Addons for discovery
  - Improves workflow for Odyssey libraries
  - Facilitates delivery to non-Odyssey libraries through

Addons for Discovery

- Use Addon to search non-catalog resources
  - Google Scholar
  - Various A-Z Lists
  - EBSCO A to Z List
  - Serials Solutions Citation Linker
  - SFX Linker
- Develop your own!
- Install Addon
  - Download the desired Addon zip file from the Addons directory (see link below)
    - Save to your computer with the ILLiad client
  - Extract the file to the ILLiad Addons folder
    - Default folder for Addons is C:\Program Files\ILLiad\Addons
  - Open the **System** ribbon and click the **Manage Addons** button
    - If this button does not show on your ribbon, you will need to enable permissions in the Staff Manager.
  - Configure the Addon in the **Manage Addon** window that opens by adding values to search your local e-resource finding system
- View Addon tab from **Lending Request** form
  - **NOTE: Some Addons are programmed to display ONLY on article requests.**
- Use Addon search to verify holdings.



- If holdings are electronic, use steps below to deliver via Odyssey or Article Exchange for non-Odyssey libraries.

Odyssey Delivery

The **Mark Found** and **Mark Found Scan Now** available directly from the Lending Request form.

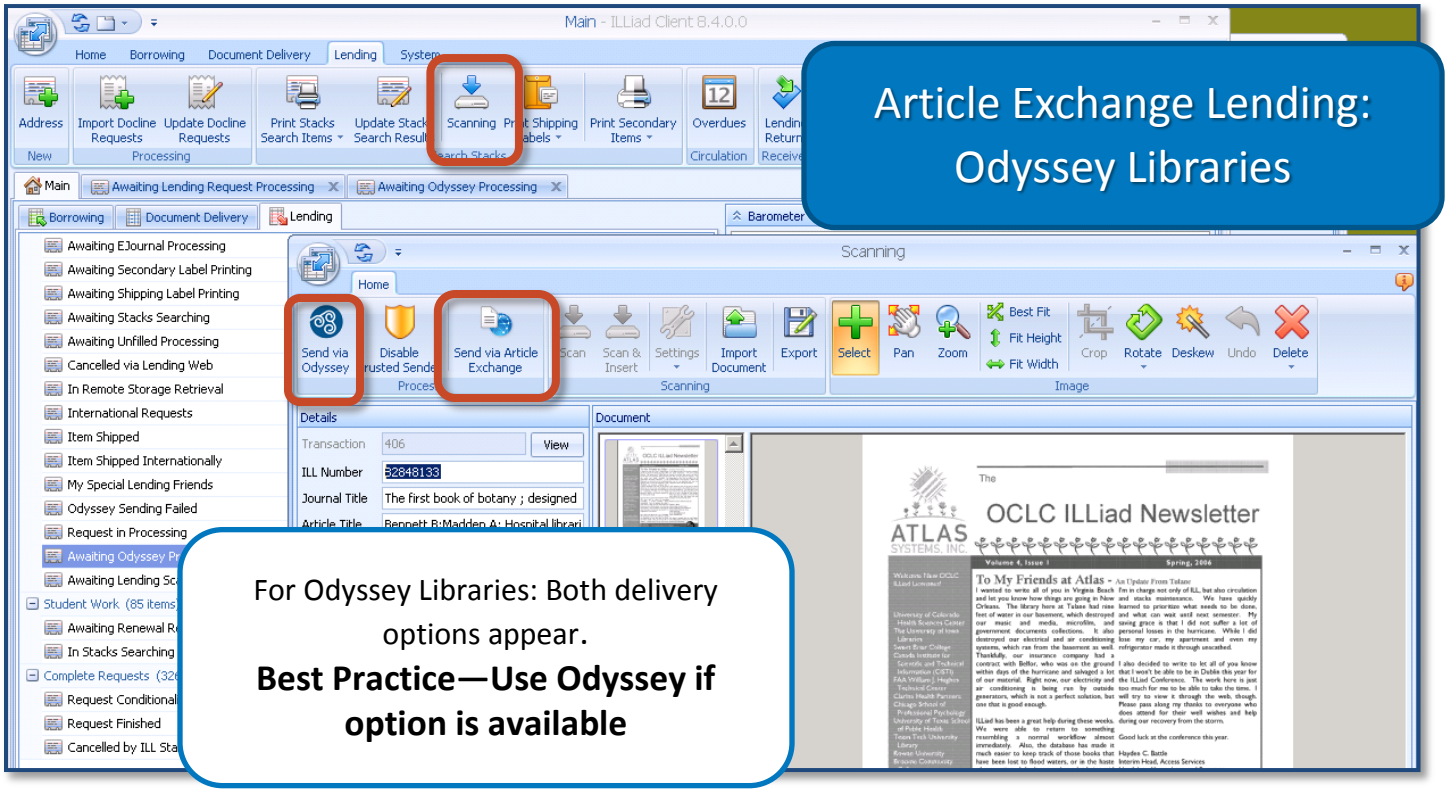
- Do not need to route requests through **Stacks Searching** steps
- Can update request upon discovery of item
- Expedites processing of article available in digital collections
- Sample workflow (of PDF document)
  - Discover article in electronic resource database
    - You might consider installing an Addon to assist your searching. Information on Addons available here: https://prometheus.atlas-sys.com/display/ILLiadAddons/ILLiad+Addons
  - Save article to a location accessible from the ILLiad client with the transaction number as the file name (example: 4329.pdf)
  - Add **"E-resource"** to Call Number and/or Location fields (optional)
    - Adding this information to the request will allow you generate statistics on the use of your electronic resources for lending.
  - Verify if the Borrower can receive PDF documents
    - If not, convert saved document to .tiff format
  - Click the **Mark Found Scan Now**
  - Navigate to the file where the article was saved with the **Import Image** option for .tif files or the **Import PDF** option for .pdf files
  - Select the file and click **Open**
  - Click the **Deliver** option to send document to library
  - This workflow will automatically update the request to **Request Finished** because the request is from an Odyssey library.

Non-Odyssey Delivery—OCLC Article Exchange

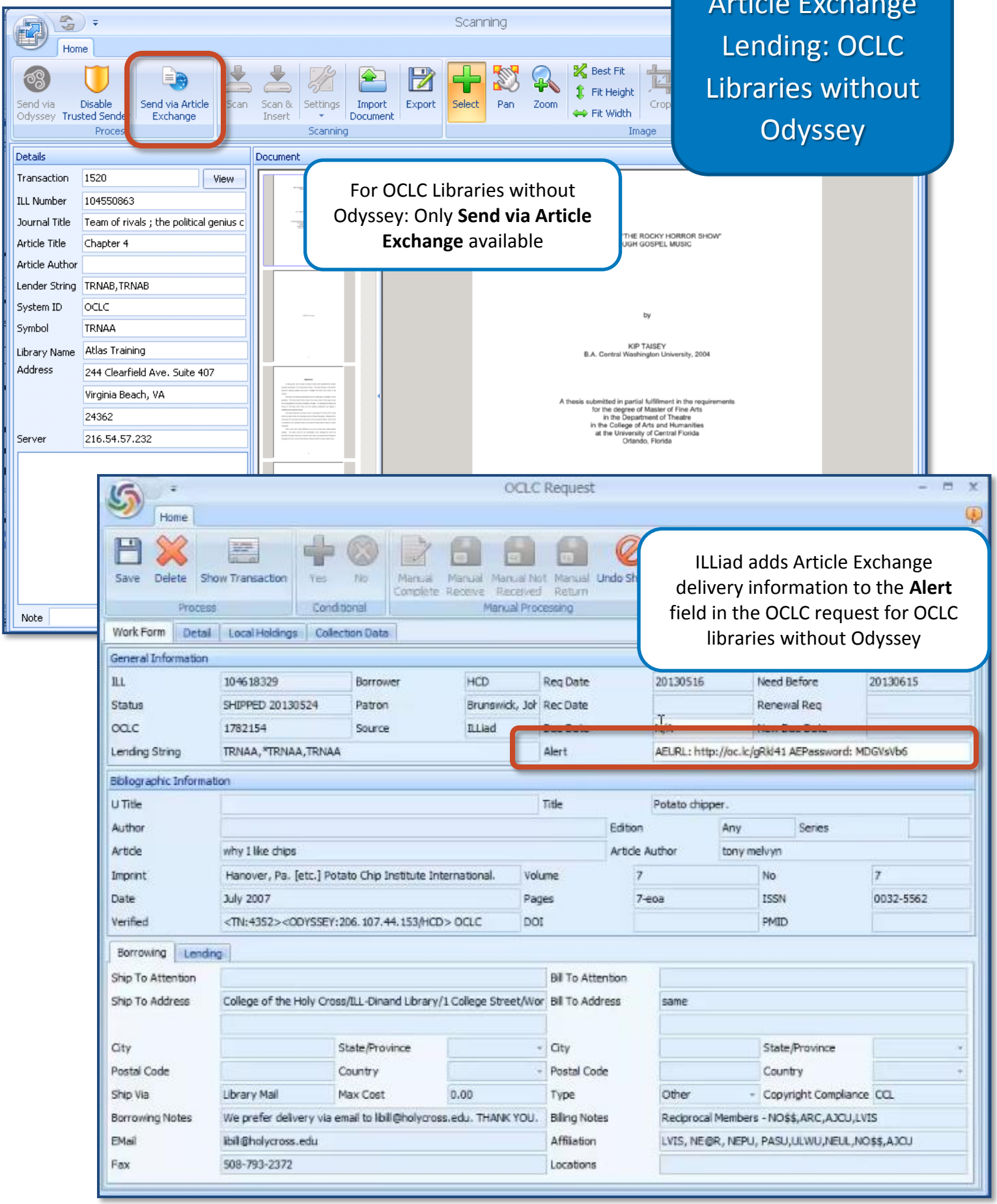
ILLiad 8.4 Workflow Description

Lending

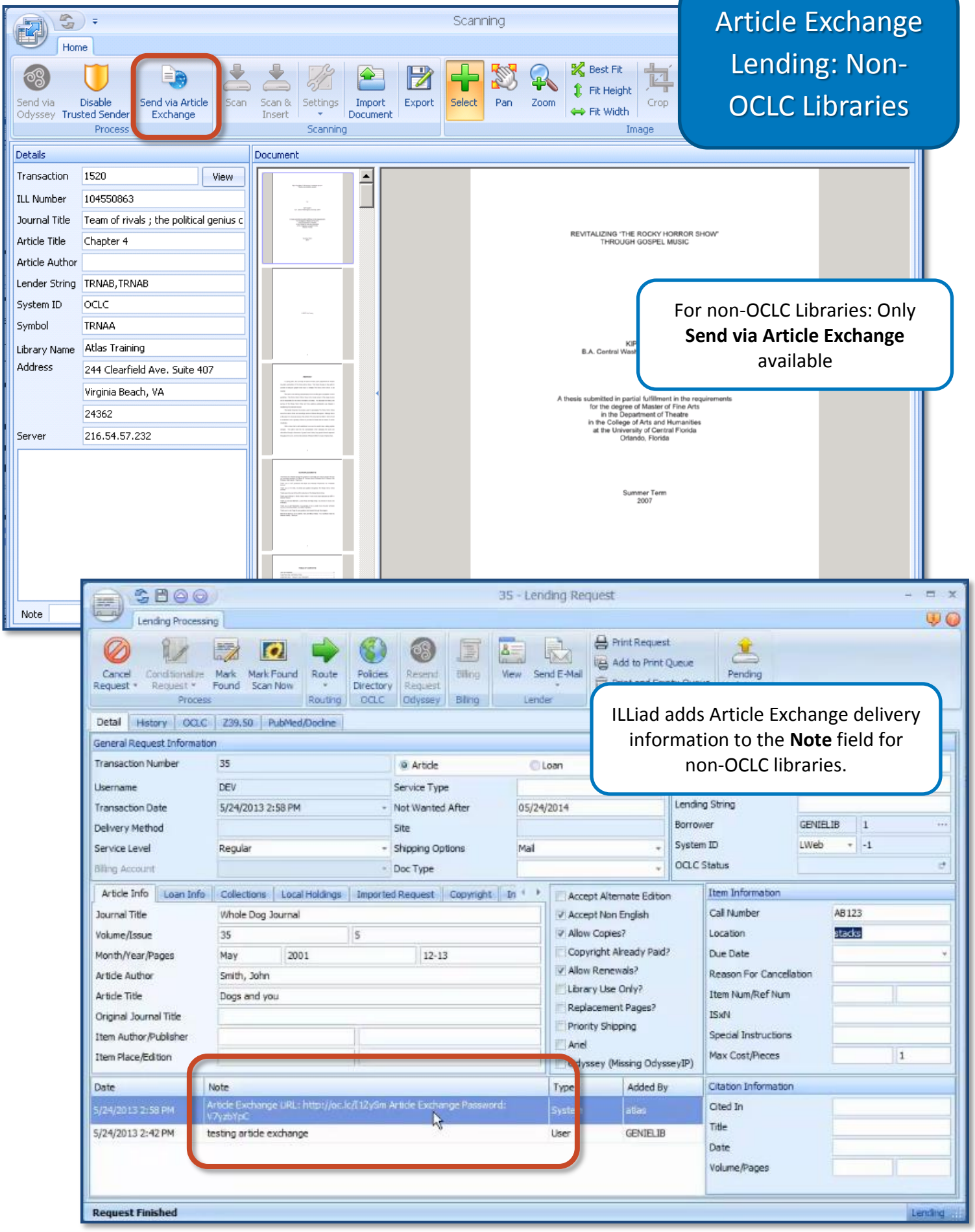
- Changes to **Mark Found Scan Now**
  - Scanning workform has options to send via Odyssey or Article Exchange depending upon the requesting library's use of Odyssey
  - AE info added to **Alert** field if OCLC request or **Note** field if not an OCLC request
  - If not an OCLC request, ILLiad sends email to **BorrowingDepartmentEmail** in Lender Address Record
  - Can override electronic delivery if need be
- New statuses
  - **Awaiting *Lending* Scanning** replaces **Awaiting *Odyssey* Scanning**
  - **Awaiting Article Exchange Notification** queue
    - Error status
    - Not an OCLC request and lacks Borrowing Department email address in the Lender Address Record
- Button changes
  - **Scanning** replaces **Odyssey Scanning** button on Lending Ribbon
  - **Import Document** replaces **Import PDF** and **Import Image** buttons on Scanning window



Article Exchange Lending: OCLC Libraries without Odyssey

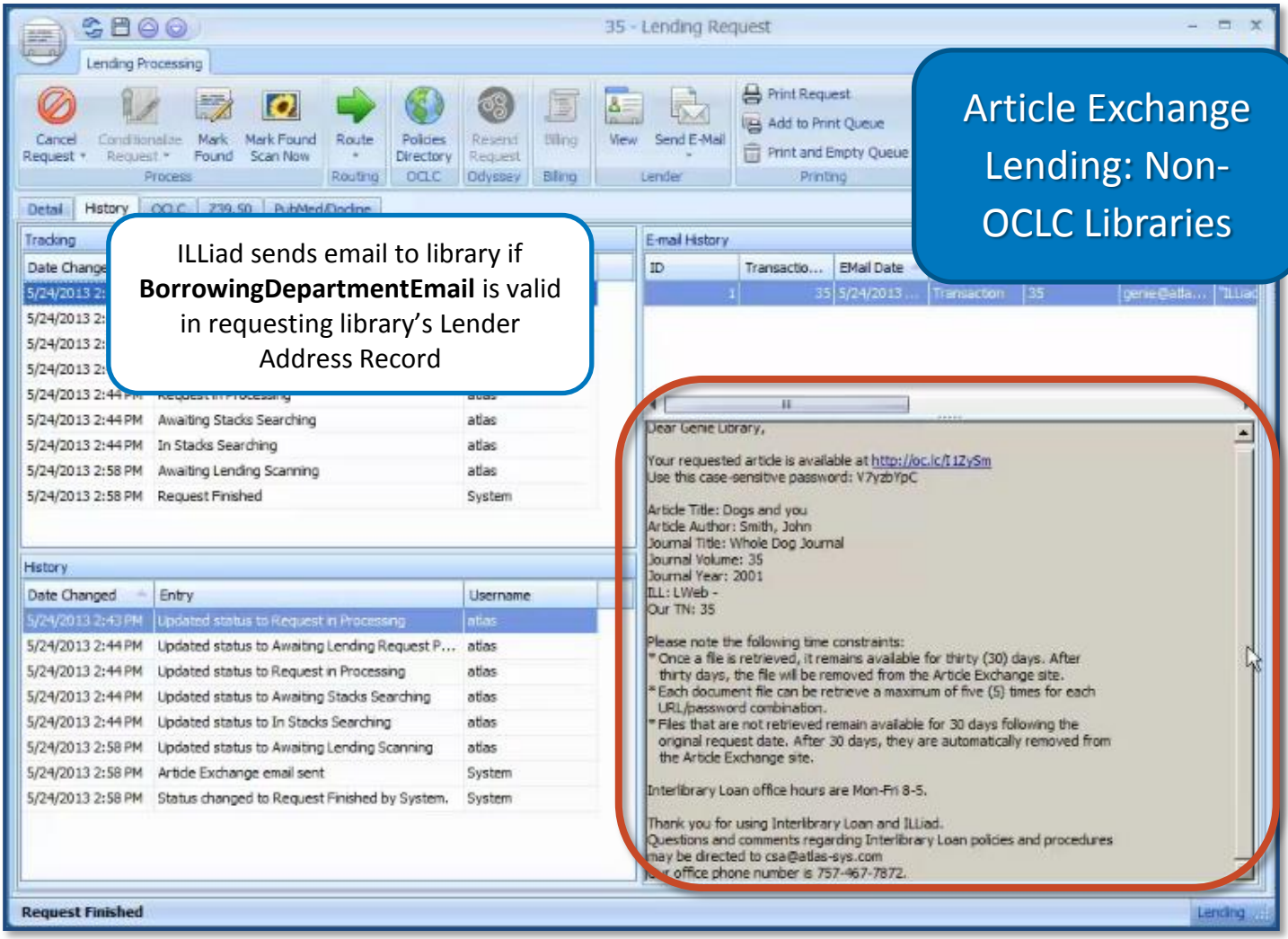


Article Exchange Lending: Non-OCLC Libraries



For non-OCLC Libraries: Only **Send via Article Exchange** available

ILLiad adds Article Exchange delivery information to the **Note** field for non-OCLC libraries.



Article Exchange Configuration Steps

1. Obtain Web Service Key and Secret from OCLC
2. Obtain SSL Certificate for your ILLiad web server
3. Add Customization Manager Configurations
    a) OCLC Web Key and Secret
    b) ILLiad Web Platform Configurations
    c) Borrowing and Lending Specific Configurations

Atlas Article Exchange Demo Videos
http://atlas-sys.wistia.com/projects/9c84c89449

Obtain OCLC Web Service Key

- Apply for key
    - www.worldcat.org/config
    - Create account
    - Authorize your account for your institution
        - Settings option in top right
        - Authorize Institutions
        - Add OCLC 9-digit Autho and Password
- Return to Service Configuration

    - Web Service Key
    - Request Key
    - Select Environment = **Production**
    - Selection Your Type of Application = **Application Hosted on your server**
    - Choose Services
        - Article Exchange
        - Interlibrary Loan Policies Directory
    - Fill in form and submit
- Request will display in **Manage Key Requests** link in left hand menu
- OCLC will email notice when key is created
- Sign in to Service Configuration
- **Manage Keys**
- **Request Secret**
- Secret will be generated immediately

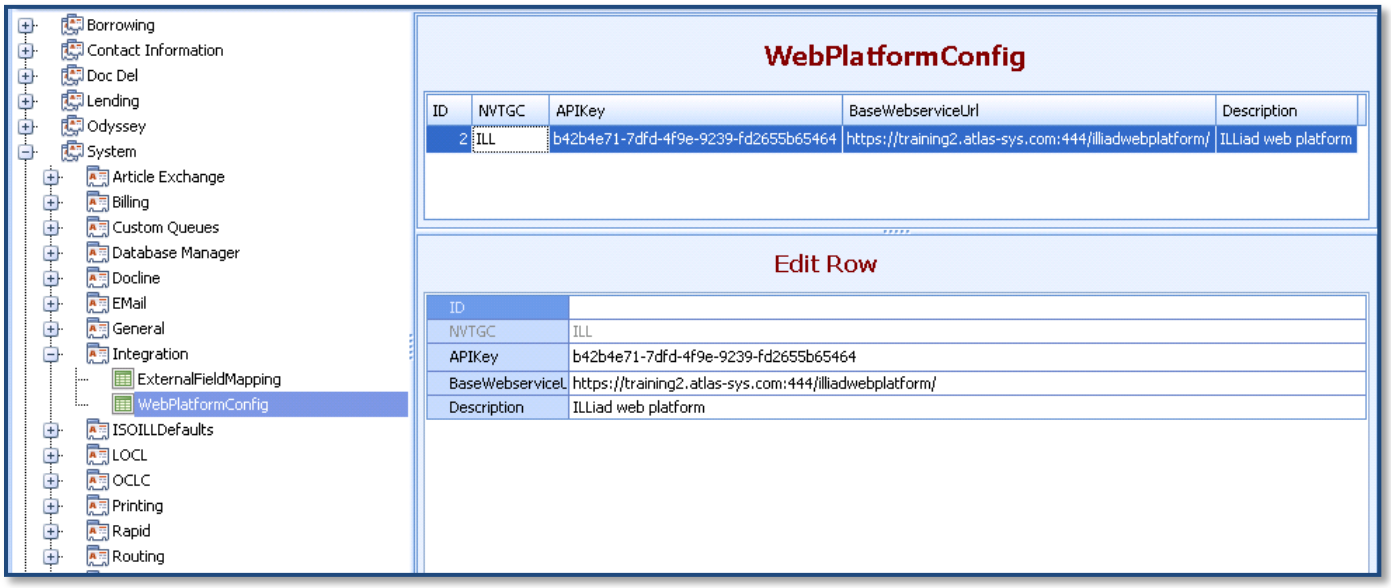
SSL Certificate

- If locally hosted, need to obtain
- OCLC hosted
    - SSL Certificate obtained
    - No fees after July 1
- Adding a SSL certificate to your ILLiad web server will change the default URL to log onto ILLiad from the web (from **http:// yourILLIadwebaddress** to **https:// yourILLIadwebaddress**). Be sure to change all references to that link in your web pages and in your OpenURL resolver if you are using one.
- You will also need to update the following keys in the Customization with the secure URL.
    -

ILLiad Configurations

Customization Manager

- Add OCLC Web Service Keys to
- System
    - OCLC
        - OCLCWebServiceV2APIKey
        - OCLCWebServiceV2APISecret
- Create **ILLiad Web Platform** Configurations
    - System
        - Integration
            - WebPlatformConfig
    - Click **New Record**
    - Add **APIKey** value by clicking the … icon at the end of the field
    - Add **BaseWebserviceUrl**
        - Must be secure site (i.e. begins https://)
        - Add /illiadwebplatform/ to end of URL
        - Entry example: https://training2.atlas-sys.com/illiadwebplatform/
    - Add **Description**
        - **This is a required field**



- Add **Record ID** number created in steps above to
    - System
        - Web Platform
            - **ILLiadWebPlatformConfig**

AE Borrowing Configurations

- Trusted Sender for Article Exchange
    - System
        - Article Exchange
            - ArticleExchangeTrusted
    - Value options: Always, Trusted, Never
    - Same Trusted value in Lender Address record is used for both Odyssey and Article Exchange

AE Lending Configurations

- System
    - Article Exchange
        - ArticleExchangeLendingEmailSubject
            - Recommend: Adding Institution name to default subject
        - ArticleExchangeLendingEmailSystemIDs
            - *****Need to add these values in order for ILLiad to send the email RAPID, DOC, ISO, LWeb etc.*****
- Edit AE email template in Customization Manger (optional)
    - **EMail Templates** Ribbon
    - Select **ArticleExchangeLendingNotification** from **Edit** drop down
    - Make edit as desired

ILLiad 8.3 Workflow Description

- Search for item in E-Resource discovery system (possibly as an Addon in the request)
    - Save the pdf to a folder with request transaction number as the file name (e.g. 6604.pdf)
- Open **OCLC Article Exchange Addon**
    - **Browse** to the saved article

    - Click **Drop File**
    - URL and password will be saved to Call number and Location fields
    - Request will return to Detail tab
- Save changes to request form
- Click **Send Email** from Request Ribbon
    - Choose **Article Exchange** option
    - Deactivate **Change Status on Send** button
    - Complete any edits to email if desired
    - Click **Send** and request will refresh to **Detail** tab
- Click the **Mark Found** option on the Borrowing Processing ribbon to complete OCLC update
- System routing rule will update request to **Request Finished**

Configure the Article Exchange Addon

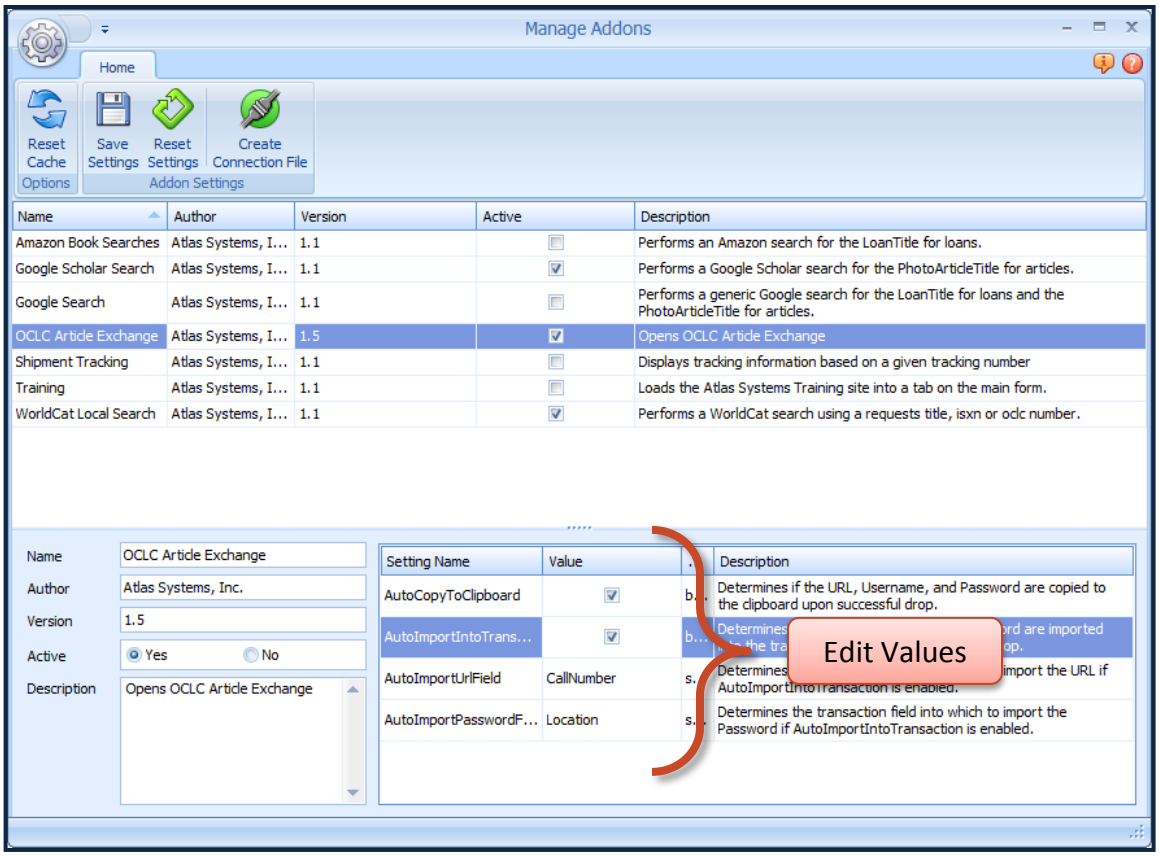
- Install and configure OCLC Article Exchange Addon
    - Download the Article Exchange Addon zip file from the Addons directory (see link above)
        - Save to your computer with the ILLiad client
    - Extract the file to the ILLiad Addons folder
        - Default folder for Addons is C:\Program Files\ILLiad\Addons
    - Open the **System** ribbon and click the **Manage Addons** button.
        - If this button does not show on your ribbon, you will need to enable permissions in the Staff Manager.

Note: Type each entry directly into Customization Manager, rather than using copy and paste functions.

    - Configure the Addon in the **Manage Addon** window that opens.
        - Highlight the **OCLC Article Exchange** record from the middle grid display
        - Fill in the values in the lower portion of the screen.
            - See the screen shot below
            - In this example the Article Exchange URL is added to the **Call Number** field and the Password into the **Location** field.
            - These defaults can be modified to save values in alternate request fields. Note: Any reference to CallNumber and Locations fields in the directions that follow would also need to be edited to match any changes to default.
        - Save the settings with the button at the top of the screen

Additional ILLiad Addons Documentation is here:
https://prometheus.atlas-sys.com/display/ILLiadAddons/ILLiad+Addons

Manage Addons Window



Email Routing

- Create Email Routing Rule
  - Go to Customization Manager Table
    - System | Email |EmailRouting
  - Create email routing rule record
    - Click New Record Button
    - Enter values for the rule. An example is given in table below.
  - Save record

Email Routing Rule in Customization Manager (E-Resource Delivery with OCLC's Article Exchange)

Field Name	Entry
ProcessType	Lending
Name	Article Exchange
DefaultToAddress	<#LenderAddressBorrowingDepartmentEMail>
DefaultToName	
DefaultCCAddress	
DefaultSubject	Interlibrary Loan <#ILLNumber> Delivery
DefaultFromAddress	ill@atlas-sys.com
DefaultFromName	Atlas ILL Dept.
DefaultStatus	
FileNameLoan	articleexchange.txt
FileNameArticle	articleexchange.txt

- Create Email Template
  - Locate file where email templates are saved
    - Folder location will be designated in the Customization Manager
      - System | Email |EmailLocation
  - Create an email template to notify the borrowing library of the Article Exchange delivery. See example below.
  - Save as ***articleexchange.txt***

Additional Documentation on Email Routing is here:
https://prometheus.atlas-sys.com/display/illiad/Customizing+Emails

Email Routing Template Sample (Also available as a .txt file in the Attachment)
Dear ILL Librarian:

An article that you requested is now available for download.
Title: <#PhotoArticleTitle>
Author: <#PhotoArticleAuthor>
Journal: <#PhotoJournalTitle>
Citation: <#PhotoJournalVolume> <#PhotoJournalIssue> <#PhotoJournalMonth> <#PhotoJournalYear> <#PhotoJournalInclusivePages>

OCLC ILL: <#ILLNumber>

You can pick-up your article by navigating to the URL below and logging in with the password provided:
URL: <#CallNumber>
Password: <#Location>

Files uploaded to Article Exchange will be deleted after five views or 30 days without viewing.

Please contact us if you have questions regarding our request. When contacting us, please have the ILL Number <#ILLNumber> available.

Interlibrary Loan - Lending office hours are <#LendingHours>. Questions and comments may be directed to <#LendingEmailAddress> or <#LendingPhone>.

Sincerely,
<#LendingContactName> <#OCLCSymbol>
<#LendingEMailAddress>
<#LendingPhone>

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******

Log out of client and log back in to activate changes made in the Customization Manager

System Routing

- Create System Routing Rule
  - Go to Customization Manager Table
    - System | Routing |Routing
  - Create System Routing to skip **Awaiting Shipping Label Printing** for non-Odyssey Libraries
    - See example below
  - Save new record

System Routing Rule (E-Resource Delivery with OCLC's Article Exchange)

Field Name	Entry
RuleNo	[next available]
RuleActive	Yes
ProcessType	Lending
TransactionStatus	Awaiting Shipping Label Printing
MatchString	t.CallNumber like 'http://oc.lc%'
NewProcessType	Lending
NewTransactionStatus	Request Finished
Rule Description	Skips Shipping Label Printing for Articles delivered via Article Exchange to non-Odyssey libraries

Documentation on System Routing is here:
https://prometheus.atlas-sys.com/display/illiad/System+Routing+%28Routing+Rules%29

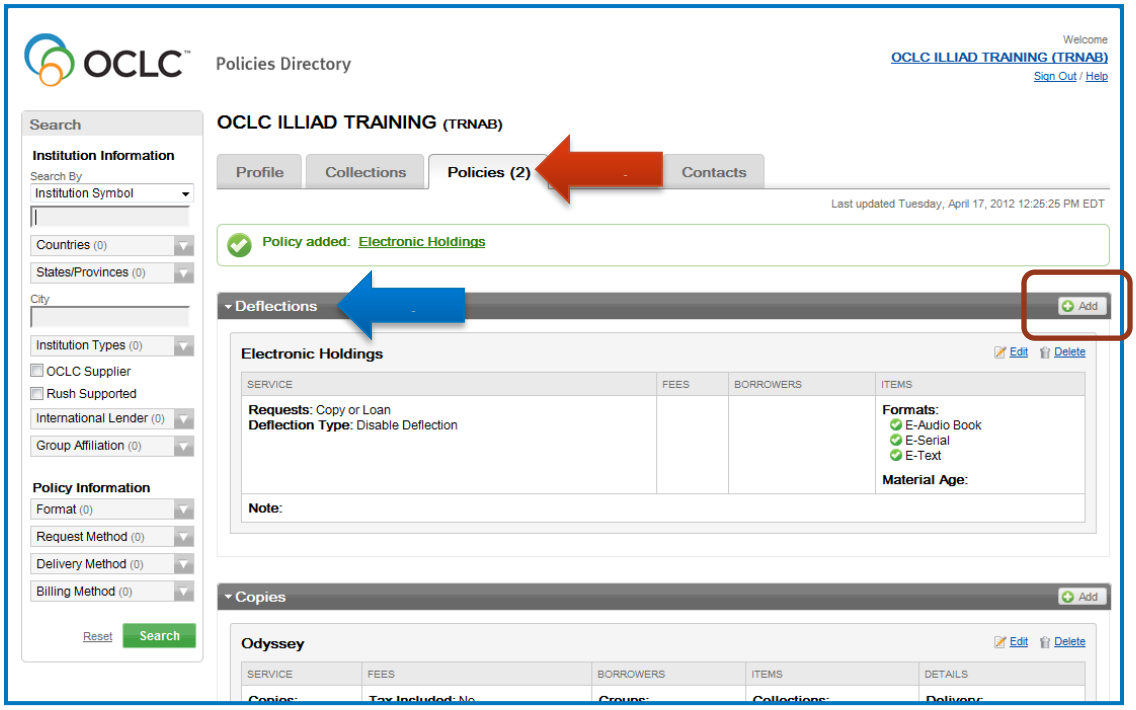
Deflection for Embargoed Items

- Use OCLC Deflection policies
  - In Policies Directory
- Target items in electronic collections within last (X) number of years
- System will auto-process requests
  - Sends "No" message
  - Provides deflection in "Reasons for No"
  - ILLiad will not download request
    - i.e. No record in ILLiad

Create Deflection

- Based on content in ILL request or WorldCat record
  - Max Cost
  - Borrowing Libraries
  - Format
  - Age

- Managed in OCLC Policies Directory
  - https://illpolicies.oclc.org
  - Edit from the **Deflections** option on the **Policies Tab** on your institutional record



- Create Policy
  - Required Fields
    - Policy Name
    - Request Type
    - Deflection Type
  - All values work together to define policy
    - Max Cost
    - Borrowing Libraries
    - Format
    - Age
  - Can mix & match to create robust policies

Max Cost	Request Type	Borrowing Libraries
Free	Loan	Consortia Libraries
$10	Loan	All Others
Free	Copy	Consortia Libraries
$5	Copy	All Others

  - **Max Cost**
    - Deflects requests where max cost is lower than number added to **Fees** → **Borrower maximum cost: <**
  - **Borrowing Libraries**
    - Choose **Include** or **Exclude** Group

            - Include will deflect for libraries in that group
            - Exclude will not deflect for libraries in that group
        - Indicate OCLC Group or group created in the **Custom Holdings**
    - **Item Format**
        - Choose **Include** or **Exclude** Format
        - Indicate **Format** type
            - Determined by format indicators in MARC bibliographic record
            - Reason why some request may "slip-through"
            - Details here: http://bit.ly/I2WpVP --scroll to Section 7.10 **Deflection Policy Formats**
    - **Material Age**
        - Supply date range
        - E.g. < 2 years

WorldCat Knowledgebase (KB)

- What is it?
    - Aggregation service of e-resources within WorldCat
- How does it work?
    - You provide access to your OpenURL resolver/KB services such as SFX or Serials Solutions
    - Pubget (contract servicers for OCLC) will crawl your content and push URL info back to WorldCat KB
- Lending benefits
    - Direct URL links provided within the ILL request for fulfillment
    - Can configure to include license terms for ILL
- Contact OCLC to join the WorldCat knowledge base
    - Informational
        - http://www.oclc.org/knowledgebase/default.htm
    - Sign Up
        - https://www.oclc.org/forms/wckb-request.en.html
    - Enable interlibrary loan for WorldCat knowledge base in the **Service Configuration** module

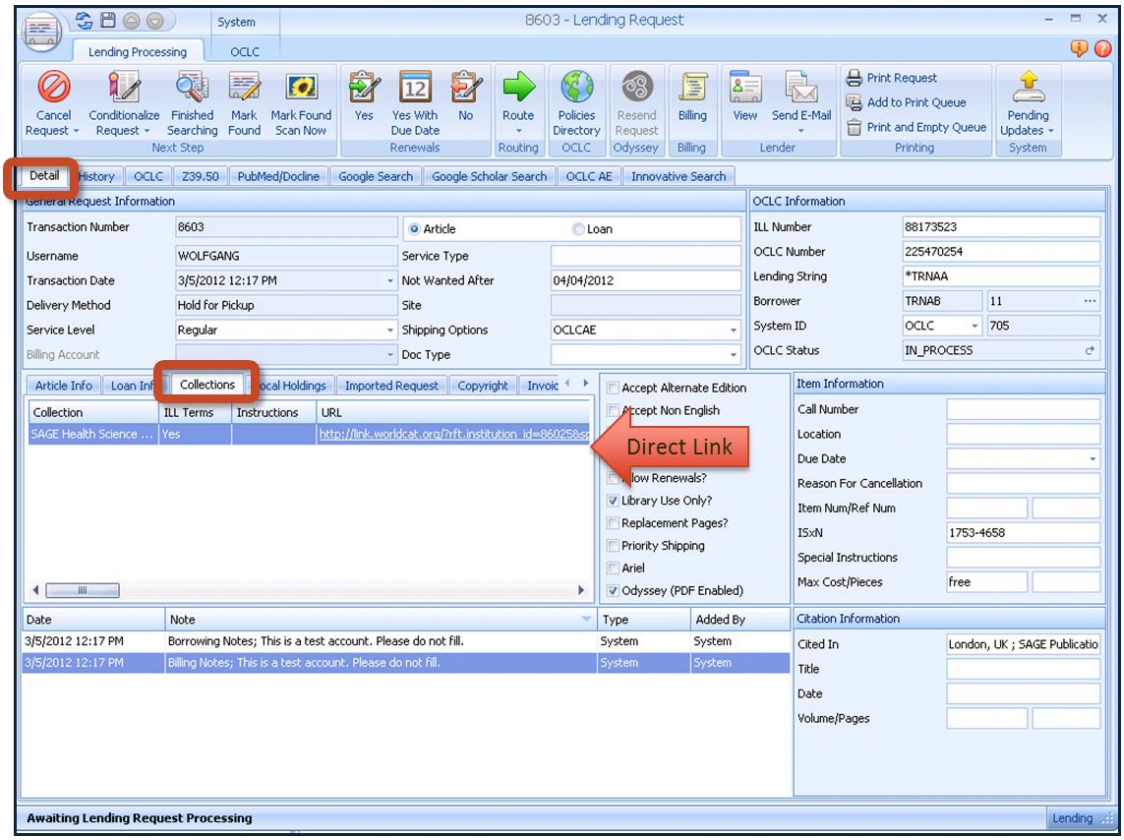
Lending Processing

- Provides a link to electronic resource
- Directly access document
- Save to local drive
- Deliver and update without closing the request as above with Addon workflow

Routing Rule for WorldCat KB Lending Articles

Field Name	Entry
Rule Number	0
Rule Active	Yes
Process Type	Lending
Transaction Status	Awaiting Lending Request Processing
Match String	t.TransactionNumber in (select distinct TransactionNumber from OCLCCollectionData)
New Process Type	Lending
New Transaction Status	Awaiting EJournal Processing
Rule Description	Routes requests with KB Links to special processing queue

Lending Requests with KB Link



Borrowing

Online, Full-Text Resource Addons

- Search online full-text resources for e-book versions
    - Local catalog with Z39.50 or catalog Addon
    - Google Combined
    - Hathi Trust
    - Internet Archive
    - Kirtas Books

Install Addon

- Download the Addon zip file from the Addons directory (see link above)
    - Save to your computer with the ILLiad client
- Extract the file to the ILLiad Addons folder
    - Default folder for Addons is C:\Program Files\ILLiad\Addons
- Open the System ribbon and click the Manage Addons button
    - If this button does not show on your ribbon, you will need to enable permissions in the Staff Manager.
- Configure the Addon in the Manage Addon window that opens by adding values to search your local e-resource finding system

Use in Borrowing Workflow

- Use Addons to verify and discover e-holdings
- Communicate with patron using **Cancellation** or **Email Routing**
    - Cancellation
        - Add URL to cancellation message **Avail – Periodicals See Notes:**
    - Email Routing
        - Create email routing to include text to indicate delivery via link or delivery to web account
            - Deliver to Account
            - Save item from Addon
            - Route request to **Request Sent**
            - From **Borrowing Ribbon**, select **Check In from Lending Library**
            - Enter transaction number
            - Click **Mark Found Scan Now**
            - Click **Import PDF**
            - Navigate to and select saved document
            - Click **Deliver**

Document Delivery Providers

- Using sources outside libraries to provide articles
    - E.g. Infotrieve, British Library, CCC Get It Now
- *Recommended **Customization Manager** configuration*
    - Navigate to **System | Custom Queues | Custom Queues**
    - Create **New Record** button
    - Add **Awaiting Doc Provider Processing** to **QueueName** field
    - Add **Borrowing** to **ProcessType** field
    - Adjust **NVTGC** if on shared server

Basic Workflow

- Route to **Awaiting Doc Provider Processing**
    - **Doc Provider** option on the **Process Copyright** screen
    - Route manually (if you created the **Custom Queue** above)
- Order through alternate provider
- Make notes as necessary regarding order in Notes field
- Change **Copyright Required** indicator to **√** if supplier includes copyright royalty in purchase fee
    - This indicator will exclude any requests from copyright reporting on the **Copyright Processing** screen
- Change **System ID** to ***Oth***
- Add values to **Lender** and **Lending String** to in OCLC Information Section of the Request form
- Route to **Request Sent** manually
    - Alternately create custom queue for monitoring these requests
- Deliver item to patron when it arrives
    - Save **PDF** with TN.pdf (*e.g. 4532.pdf*) to a designated file
        - For example: document ***4532.pdf*** is saved to the ***borrowingpdfs*** folder on the computer's C: drive
    - Open the **Check In from Lending Library** option from the **Borrowing Ribbon**
    - Enter the **Transaction Number** in the query box that you would like to update
        - If using a custom queue for monitoring as mentioned above, de-activate the **Sent Only** button
    - Click **Check In Scan Now** option from the **Check In from Lending Library** screen to update OCLC
    - **Scanning Workform** will open
        - Click **Import PDF**
        - Navigate to and select file to be loaded
    - *NOTE: Document Editing features are not available for PDF imported documents*
    - For items received in print, you may also use the scanning workform to scan items with Odyssey at this point in the workflow.
        - The scanning options will appear when a scanner is attached and configured to ILLiad machine
        - Place pages to be scanned on the scanner glass and click the scan button to initiate a scan
        - Continue until all pages are scanned
    - Click **Deliver** button in Ribbon
        - Item is loaded to and is accessible from patron's web account
        - Patron is automatically notified by email of item availability
        - Item available until patron deletes or expiry date as set in Customization Manager
            - Updated to **Complete** in OCLC

CCC Get-It-Now

- Article purchasing service set-up by Copyright Clearance Center
- Flat rate for articles
    - ~$25 each
- Automated delivery
    - To your email
    - Via Odyssey
- Also can deliver directly to patron

ILLiad Configuration

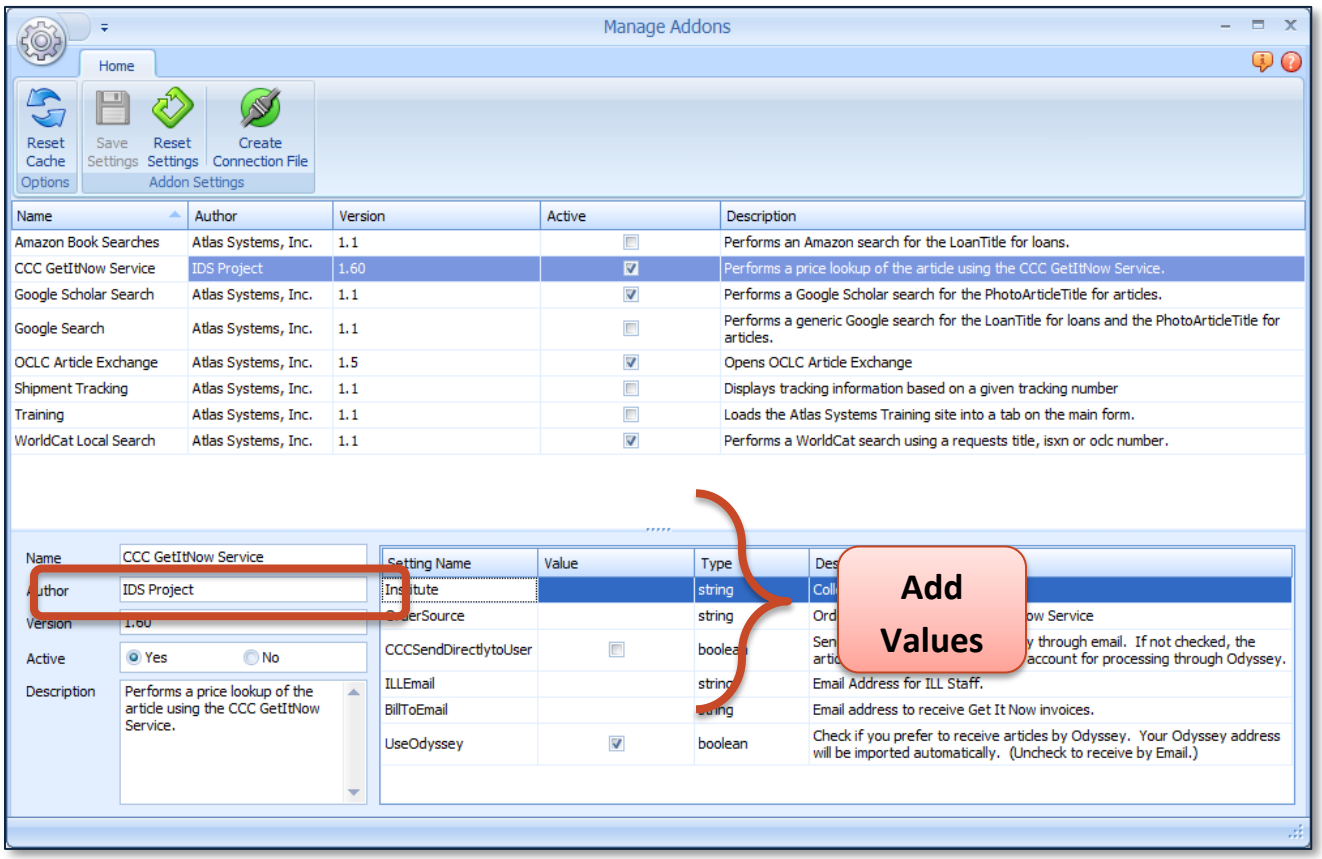
Prior to configuring with ILLiad, you will need to contact the CCC to create and configure a Get It Now account. Details available here:

http://www.copyright.com/content/cc3/en/toolbar/productsAndSolutions/getitnow.html

Get It Now Addon

- Install and configure the Get It Now Addon
  - Download the Get It Now Addon zip file from the ILLiad Addons directory
    - https://prometheus.atlas-sys.com/display/ILLiadAddons/CCC+GetItNow+Service
    - Save to your computer with the ILLiad client
  - Extract the file to the ILLiad Addons folder
    - Default folder for Addons is **C:\Program Files\ILLiad\Addons**
  - Open the **System** ribbon and click the **Manage Addons** button.
    - If this button does not show on your ribbon, you will need to enable permissions in the **Staff Manager**.
  - Configure the Addon in the **Manage Addon** window that opens.
    - Highlight the **Get It Now** record from the middle grid display
    - Fill in the values in the lower portion of the screen.
      - See Screen Shot and Field Descriptions below

NOTE: Addon Installation and Configuration will need to be completed on each computer using ILLiad to process Get It Now requests



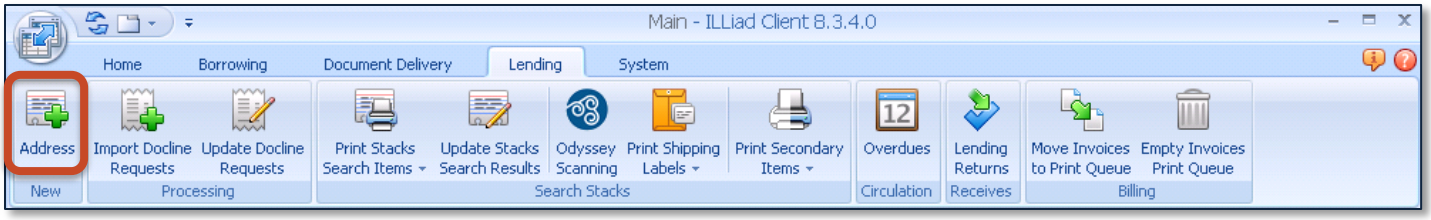
Field	Description
Active	Set radio button in left pane to Yes
Institute	CCC issued College ID/Name value
Order Source	CCC issued Order Source value
CCC Send Directly to User	If checked, will send the article to the user directly via email address in ILLiad user record. If not checked, the article will be sent to the library email address registered in the ILL Email field.
ILL Email	Library email address that would receive articles, typically ILL department.
Bill to Email	Email address that will receive Get It Now invoices.
Use Odyssey	Check if you prefer articles to be sent via Odyssey rather than email.

- Additional ILLiad Addons Documentation is here: https://prometheus.atlas-sys.com/display/ILLiadAddons/ILLiad+Addons

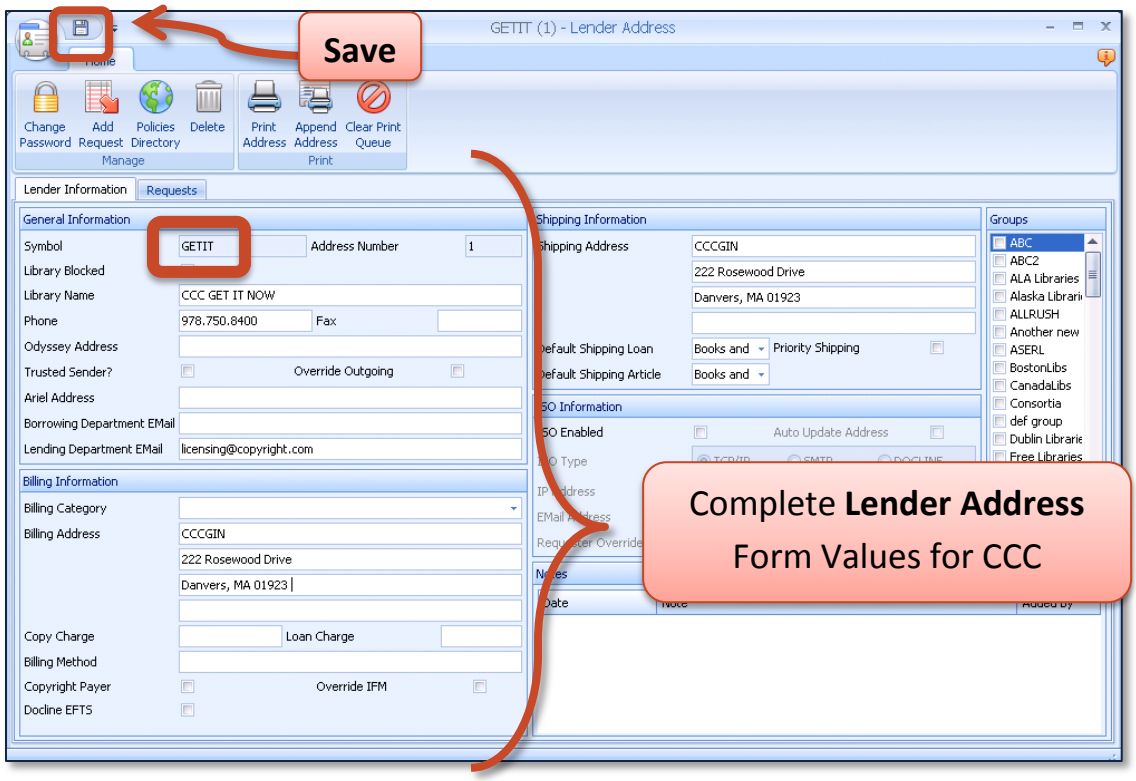
Lender Address

Create a Lender Address record for the CCC Get It Now service to identify it as a supplier.

- From the **Lending Ribbon**, select the **Address** button on the left hand side.



- A blank **Lender Address Record** form will open
- Enter the values for the CCC Get It Now service. See example right.
- **Lender Symbol is GETIT**
- Save address record with the save icon in the top left corner of the form



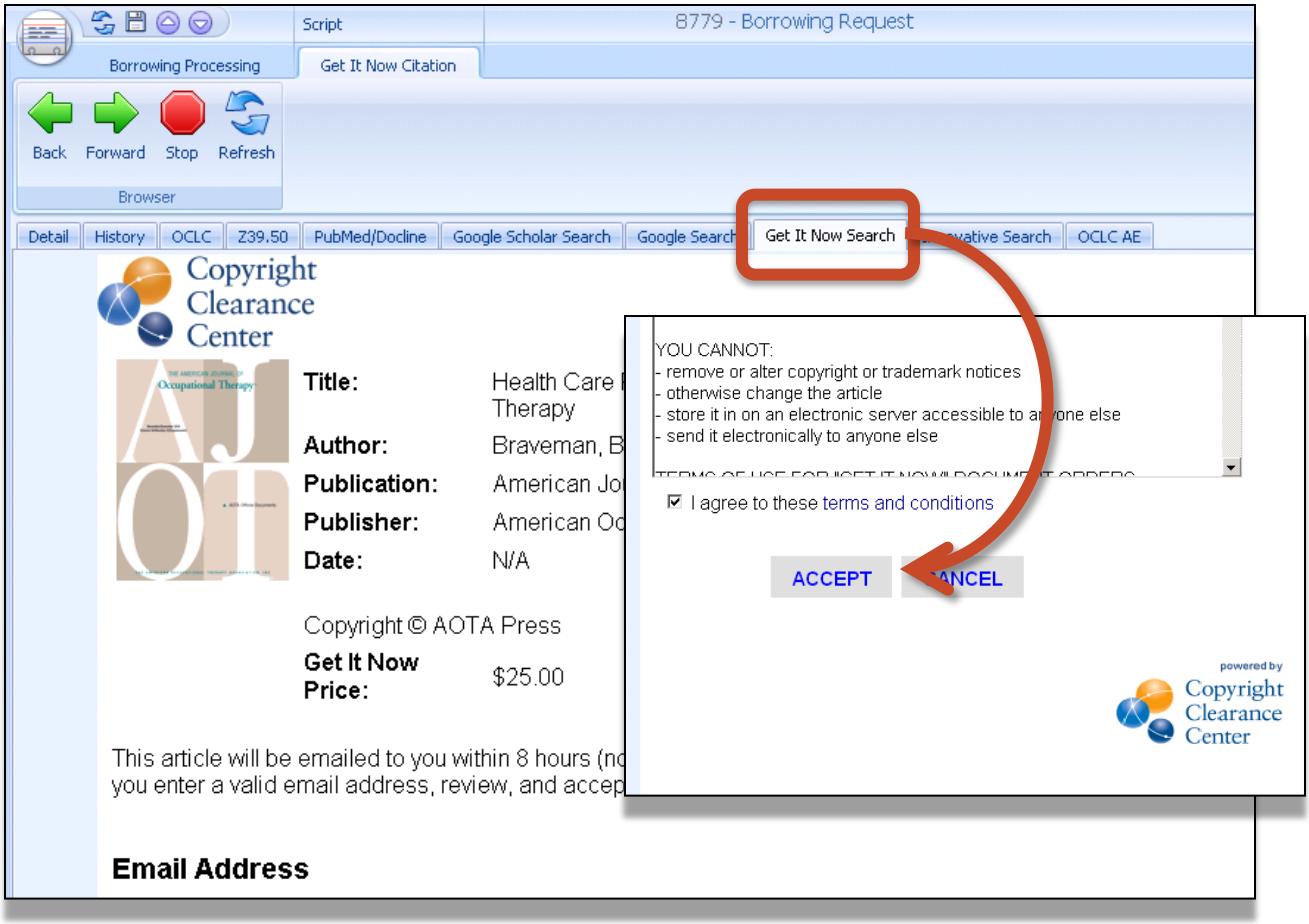
ILLiad Get It Now Processing

You have several options to configure your workflow for use with the Get It Now service. Three delivery options are available—deliver to the library via Odyssey, deliver to the library via Email, or deliver direct to the patron's email. No matter your choice of delivery method, the initial requesting steps will be the same.

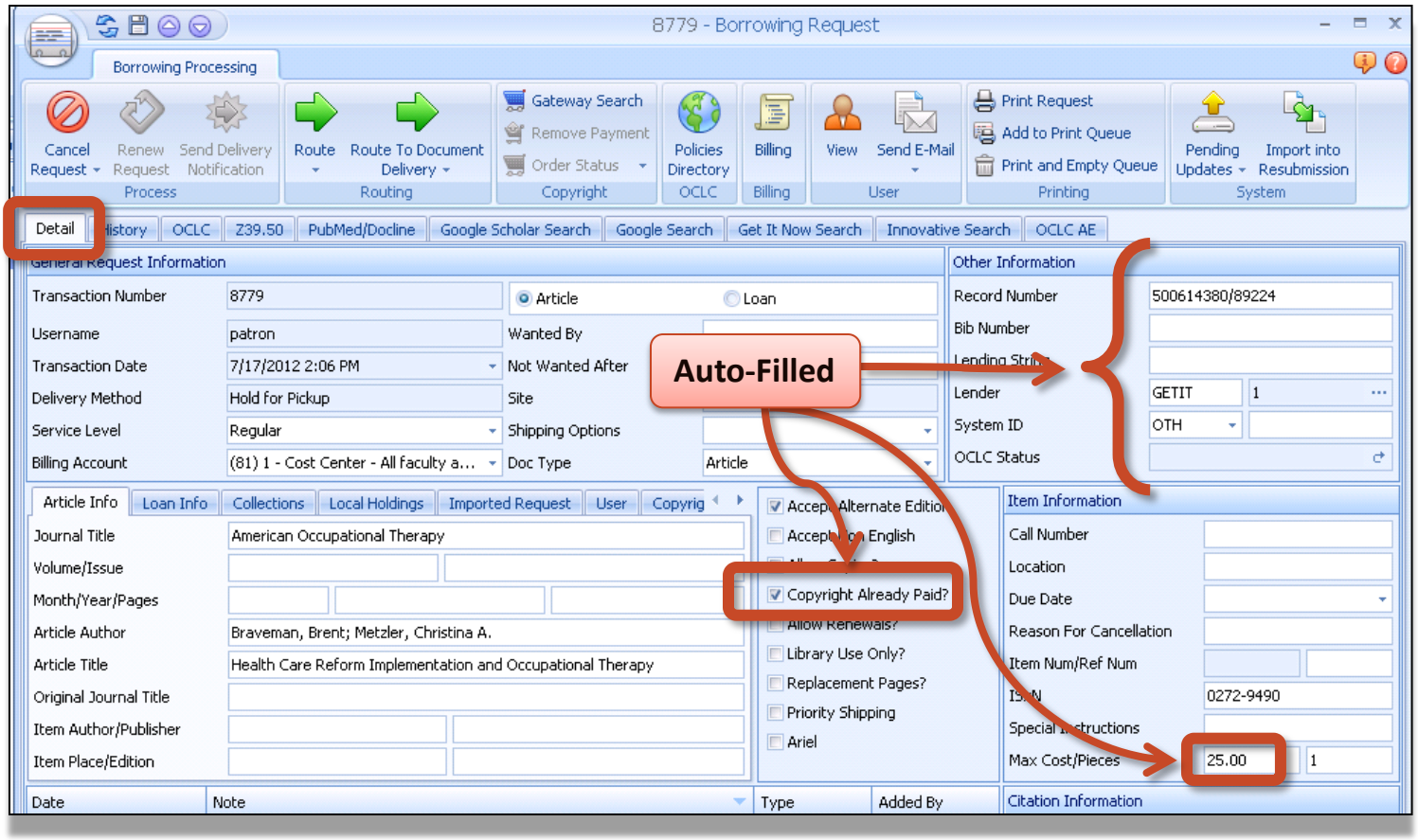
NOTE: Get It Now Addon tab will only display on requests for articles available from the Get It Now service.

Make the Get It Now Request

- Open ILLiad Borrowing request
- Open Get It Now Search Tab
    - Tab will only display on requests for articles available from the Get It Now service
    - CCC Get It Now web search result for article will display for articles available from the service and cost to purchase
    - If using email delivery, the email field will be filled in on the Get It Now screen.
- Scroll to bottom of screen to **check** the "I agree to these terms and conditions" box
- Click the **Accept** button

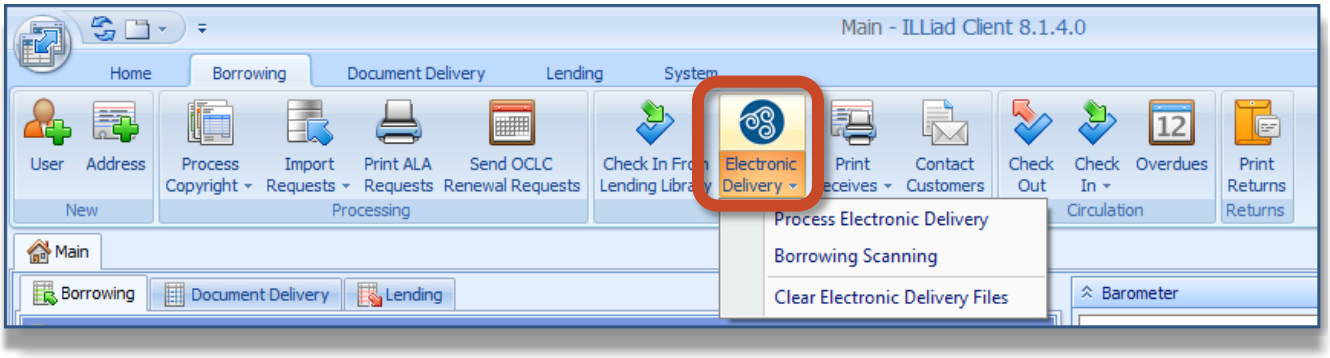


- ILLiad Borrowing request will return to the **Detail** tab and populate new values for the request
    - Record Number
    - Lender
    - System ID
    - Max Cost
    - Copyright Already Paid
- The request will remain in the **Awaiting Request Processing** Status. Updates to the request will depend upon the delivery method used.

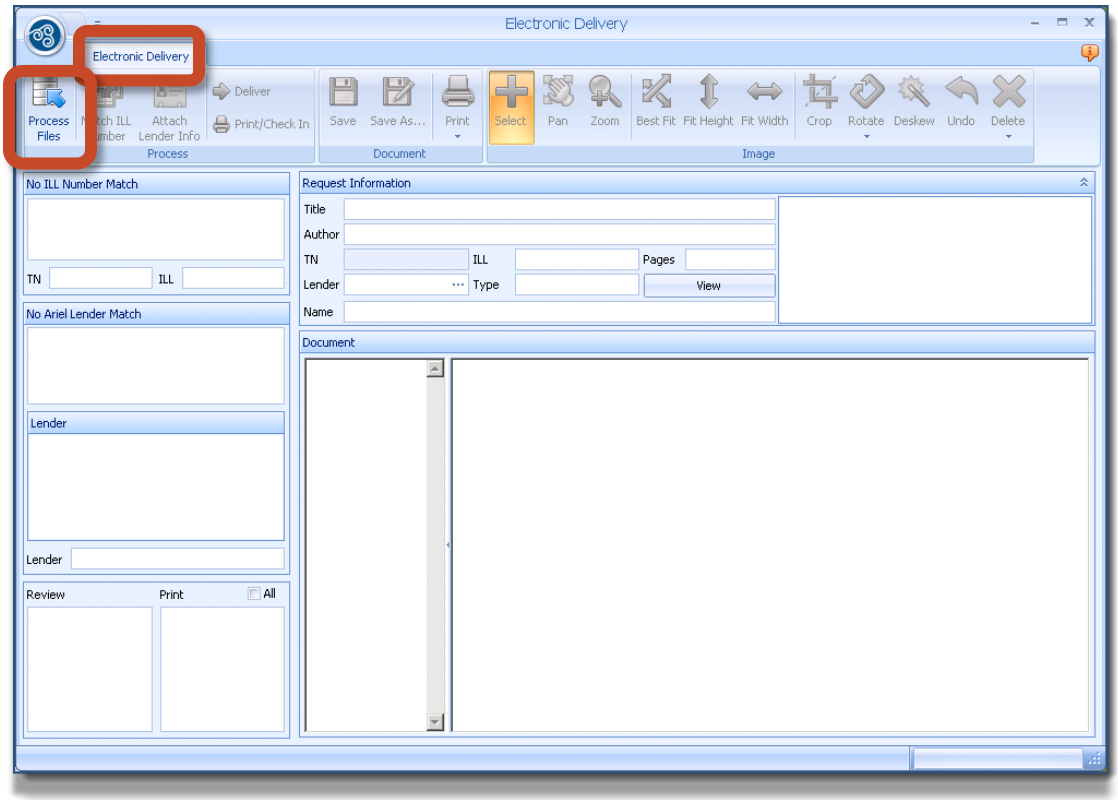


Delivered to Library via Odyssey

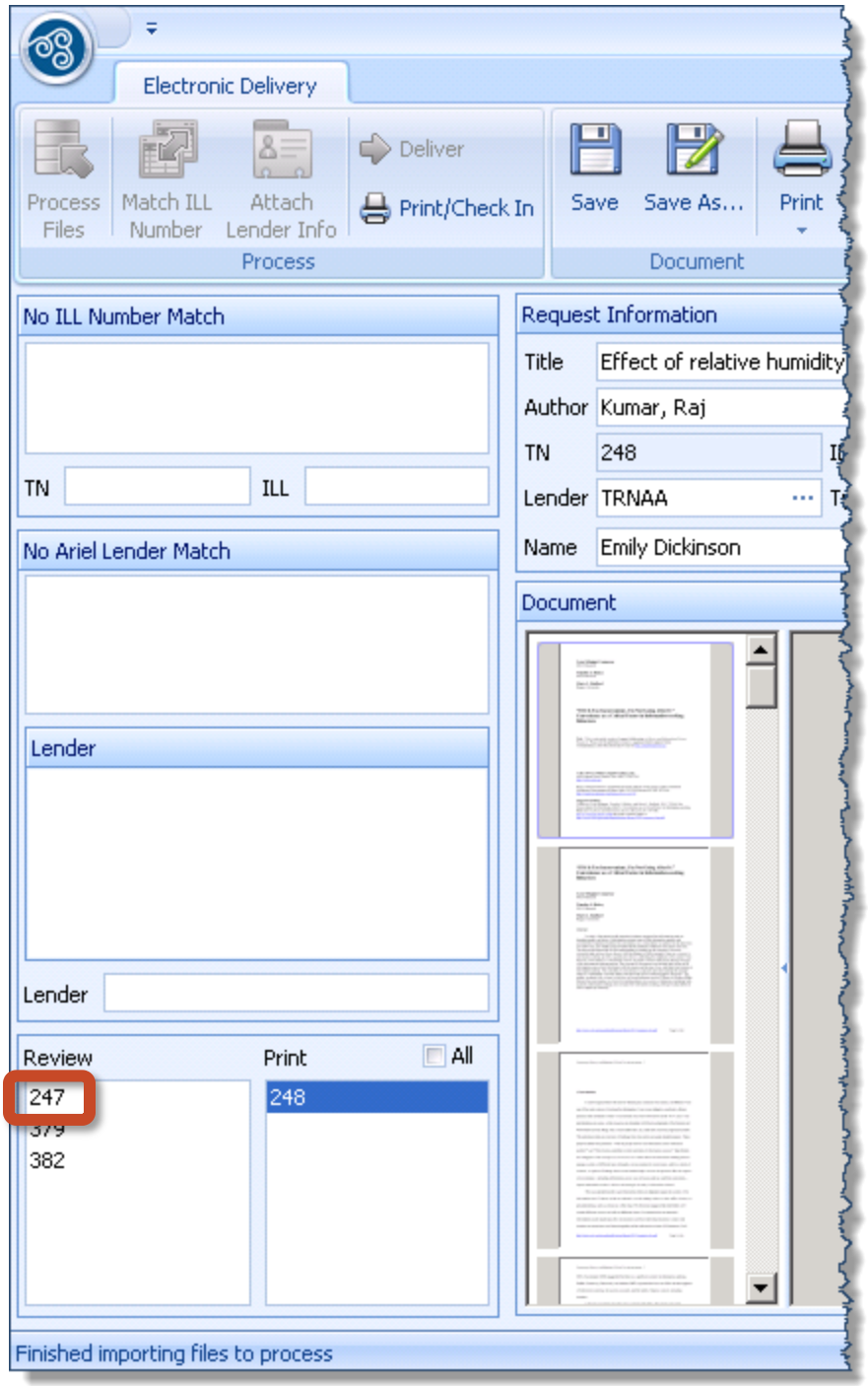
- After submitting the request, manually **route** the request to **Request Sent**
- CCC will send the article via Odyssey and ILLiad update to the request to **Awaiting Odyssey Processing**
- Process as normal for Odyssey document receipt
    - Click **Electronic Delivery** button from the **Borrowing** Ribbon



    - Electronic Delivery form opens
    - Click **Process Files** button

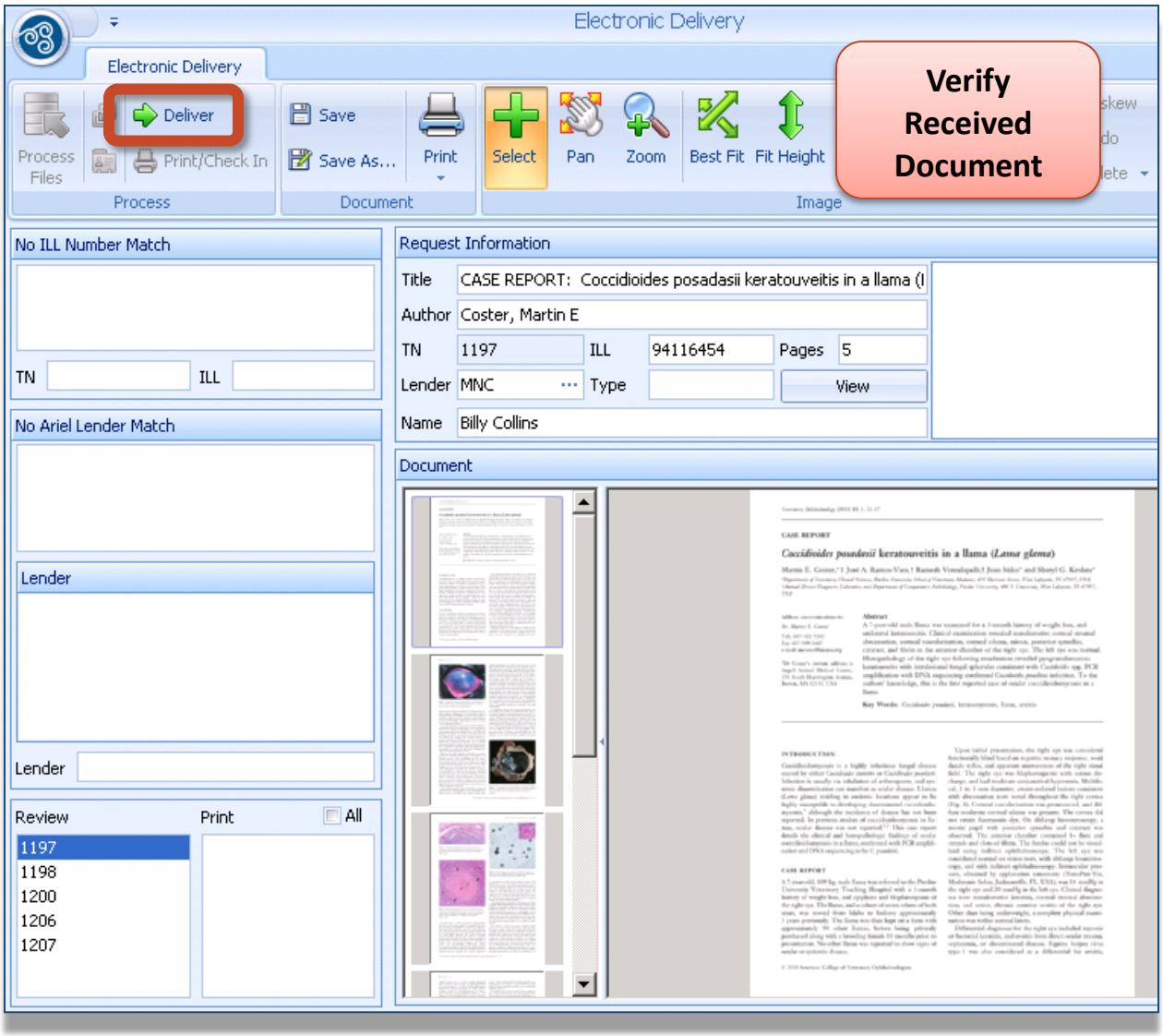


- **Awaiting Odyssey Processing** items downloaded, matched to transaction number and shows in **Review** or **Print** list in lower left of scanning form according to patron selection



- Click transaction number in the **Review** or **Print** box to highlight the request and view in right hand viewing screen

- View/Edit Scanned document with **Document Editing Features**
- Click **Deliver** button in Processing Ribbon
  - Item is loaded to and is accessible from patron's web account
  - Patron is automatically notified by email of item availability
  - Item available until patron deletes or expiry date as set in Customization Manager
  - Transaction updated to **Complete** in OCLC
  - Transaction updated to **Delivered to Web** status in ILLiad



- Odyssey requests sent from an ILLiad server always match an existing TN
  - No manual matching of electronic documents to existing transactions or IP addresses to Lender symbols is required
    - Odyssey requests sent from an Odyssey stand-alone machine may need to be matched to ILLiad transactions if information was entered incorrectly during the sending process.

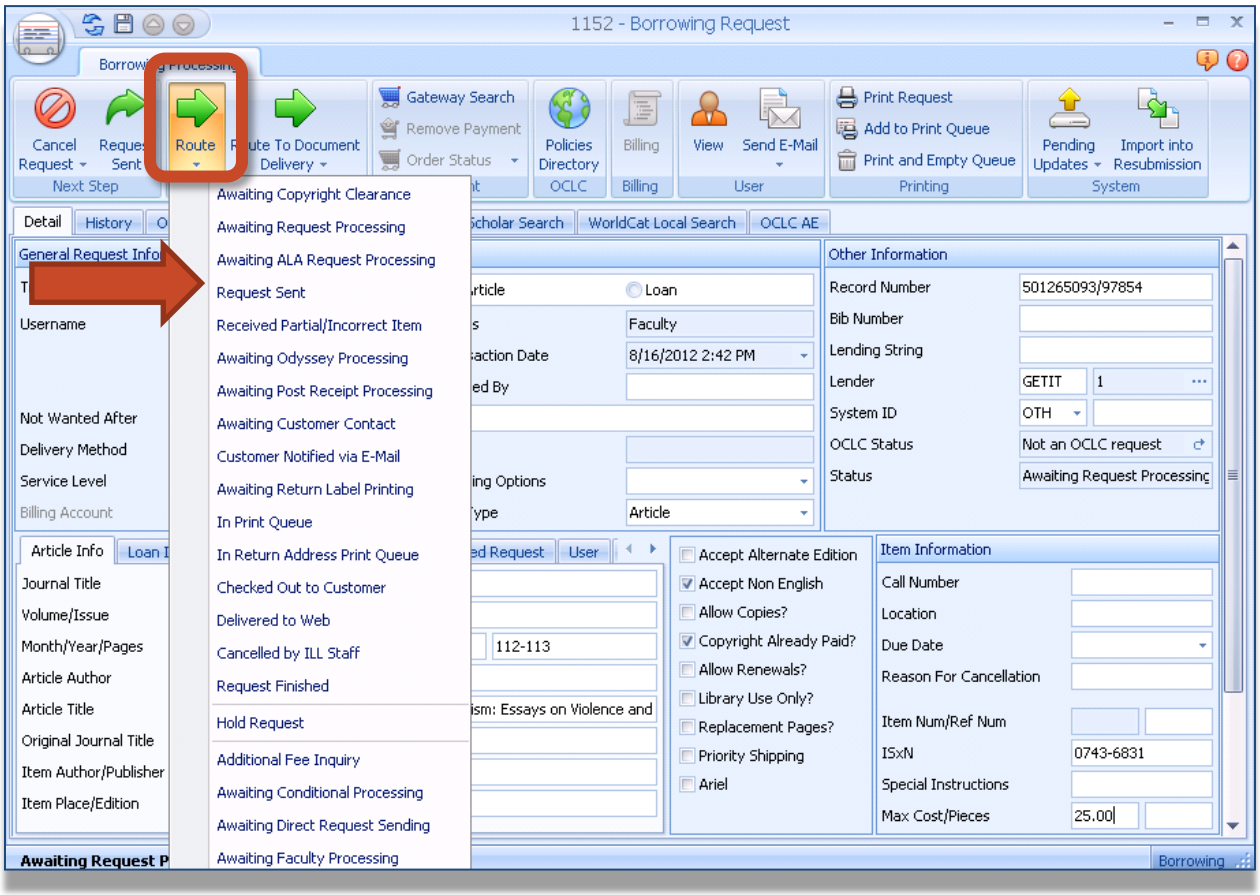
- Transaction in **Delivered to Web** status will remain available in the patron's web account until
  - Clean Up date set in Customization Manager
  - Deleted by Patron
  - Routed to **Request Finished**

You may also enable **Trusted Sender** which will deliver the article immediately to the web and notify the patron.

If you use the trusted sender option on a lender-by-lender basis, you will want to set the Trusted Sender option on the Lender Address record for GETIT.

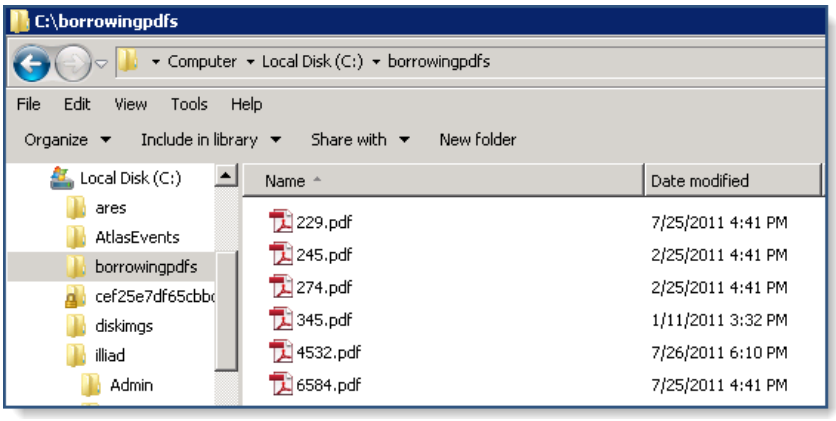
Delivered to Library via Email (Attachment)

- After submitting the request, manually **route** the request to **Request Sent**

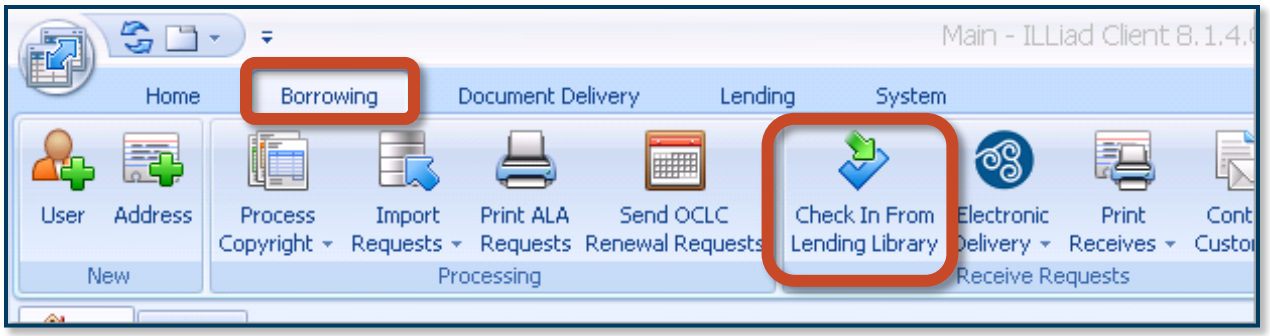


- CCC will send the article via to the email address set in the **ILLEMail** field of the Manage Addons configuration
- When the article arrives by email, you may
  - Print and deliver a physical copy
  - Post to the patron's ILLiad account
    - Scan or save **PDF** with TN.pdf (*e.g. 4532.pdf*) to a designated file

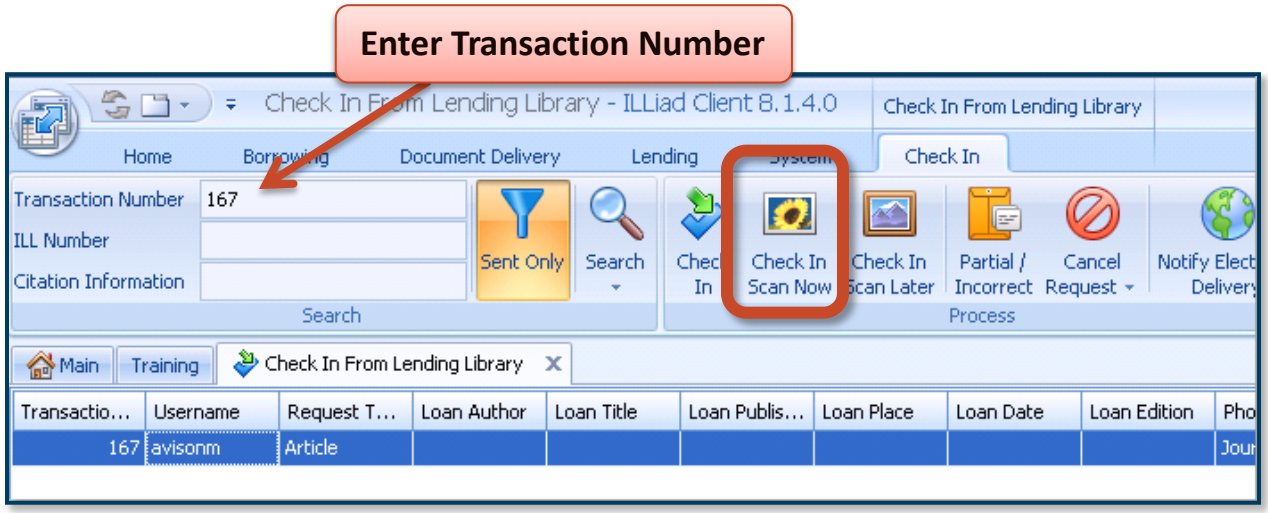
- For example: Document ***4532.pdf*** is saved to the ***borrowingpdfs*** folder on the computer's C: drive



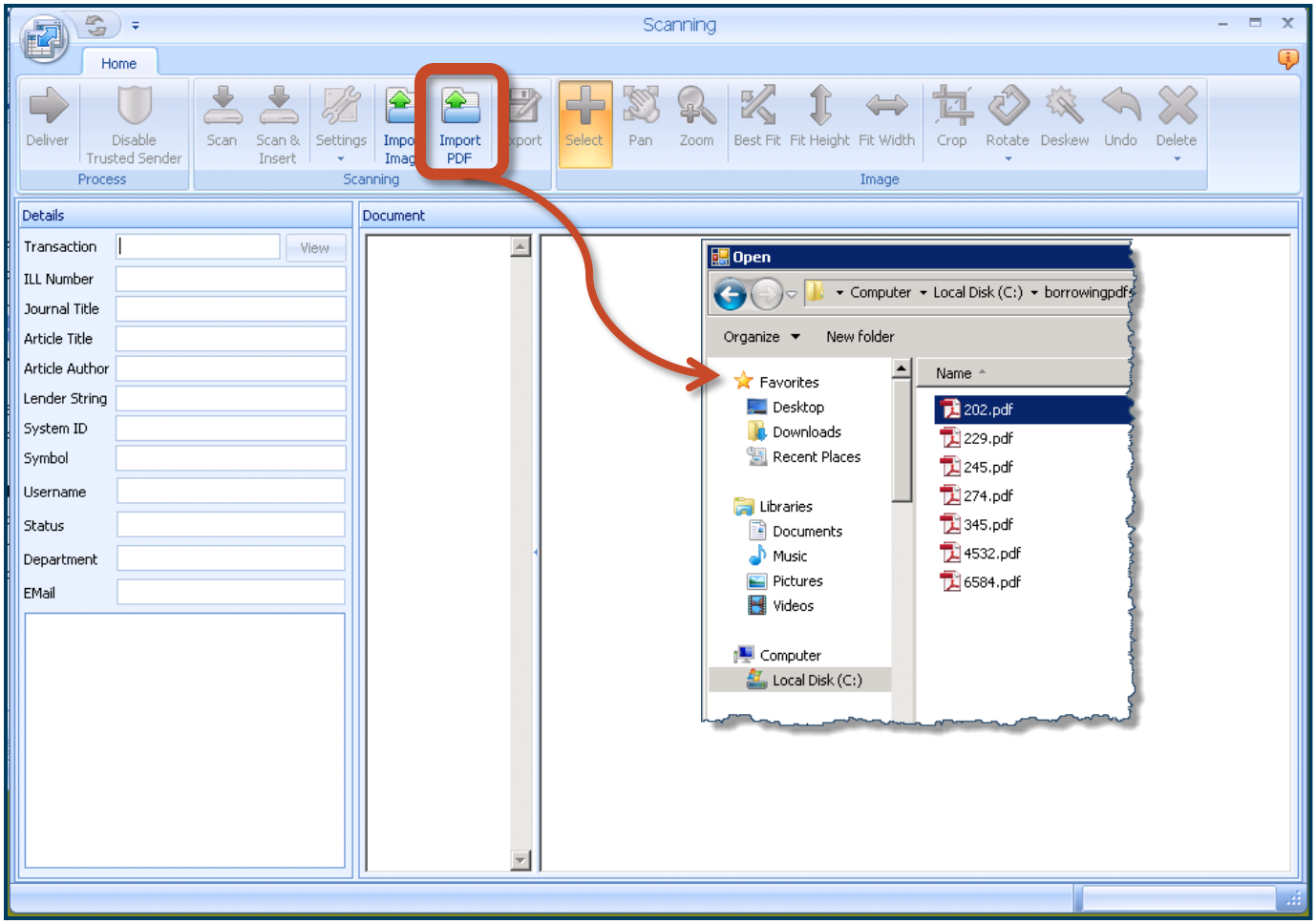
- Open the **Check In from Lending Library** option from the **Borrowing Ribbon**



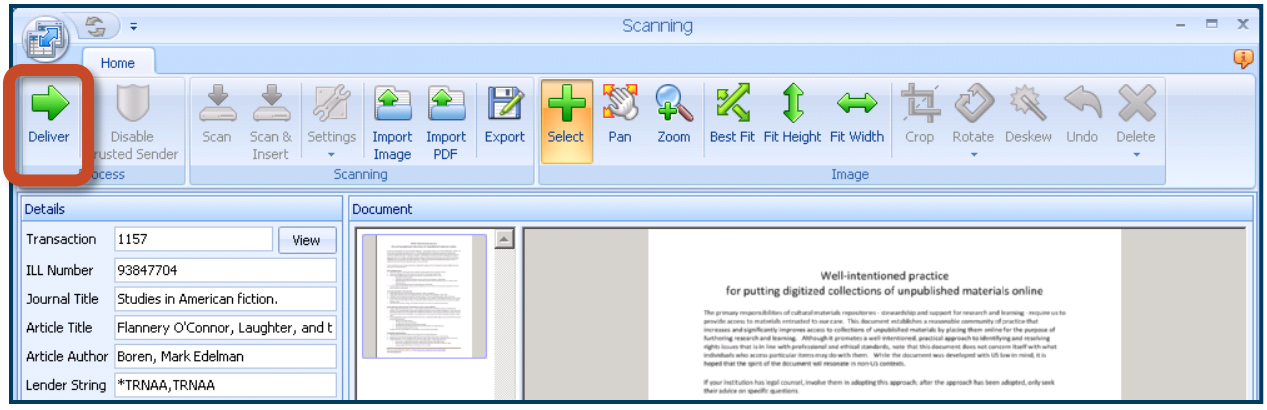
- Enter the **Transaction Number** in the query box that you would like to update
- Click **Check In Scan Now** option from the **Check In from Lending Library** screen to update OCLC



- **Scanning Workform** will open
  - Click **Import PDF**
  - Navigate to and select file to be loaded

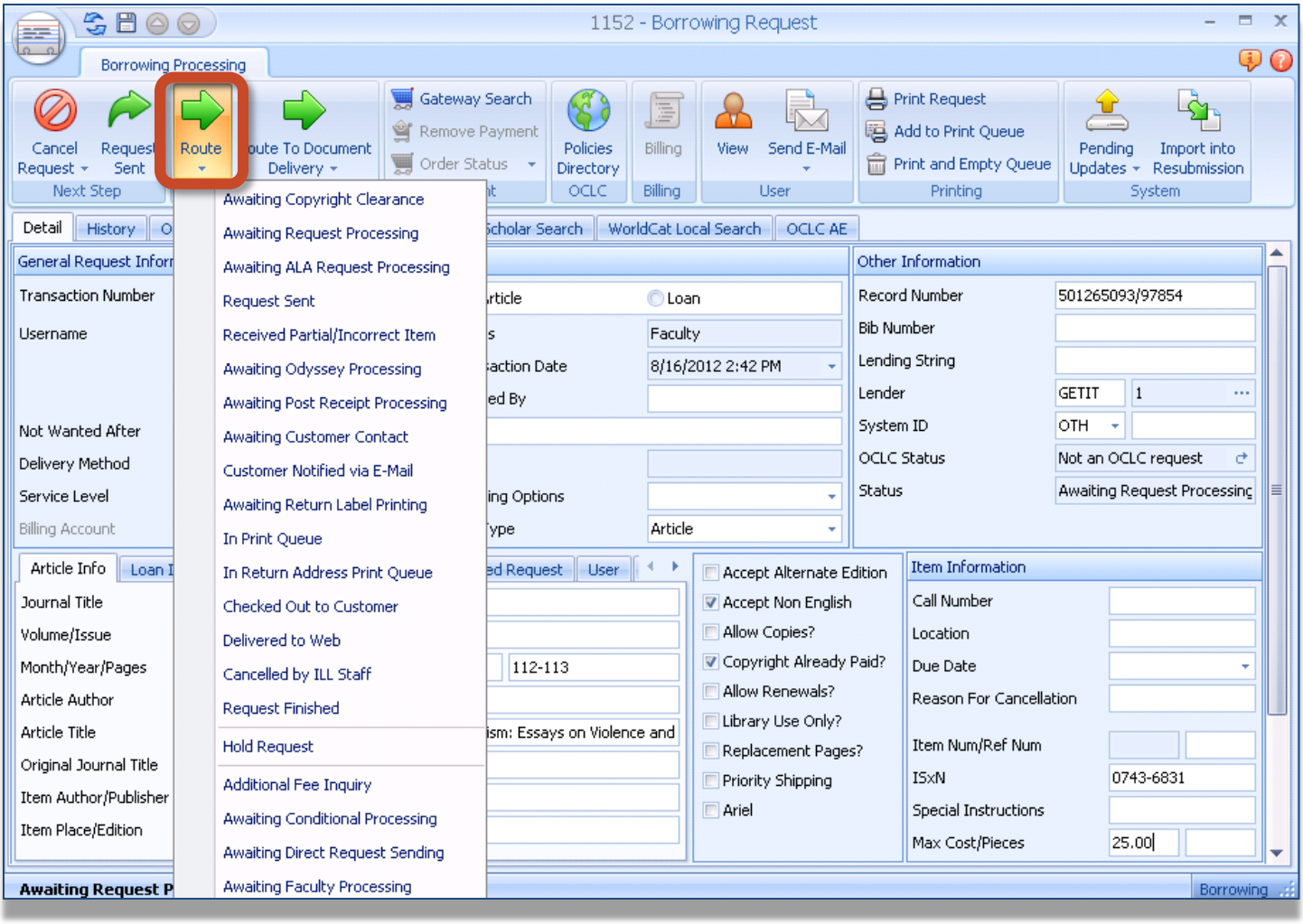


- Click **Deliver** button in Ribbon
  - Item is loaded to and is accessible from patron's web account
  - Patron is automatically notified by email of item availability
  - Item available until patron deletes or expiry date as set in Customization Manager
  - Updated to **Complete** in OCLC



Delivered Direct to Patron Email

- After submitting the request, manually **route** the request to **Request Finished**
- CCC will send article directly to patron's email address

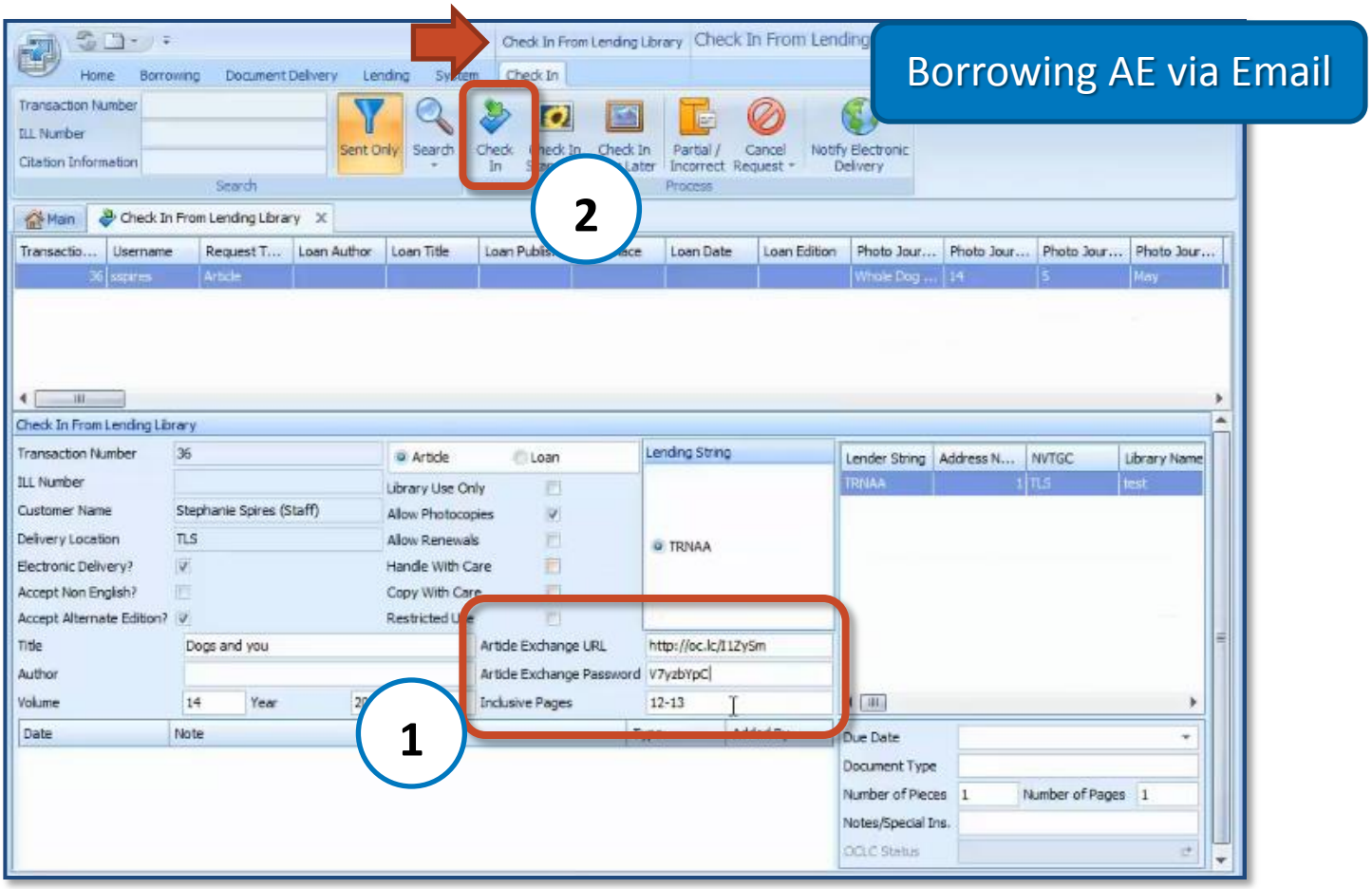


Delivered via Article Exchange (version 8.4)

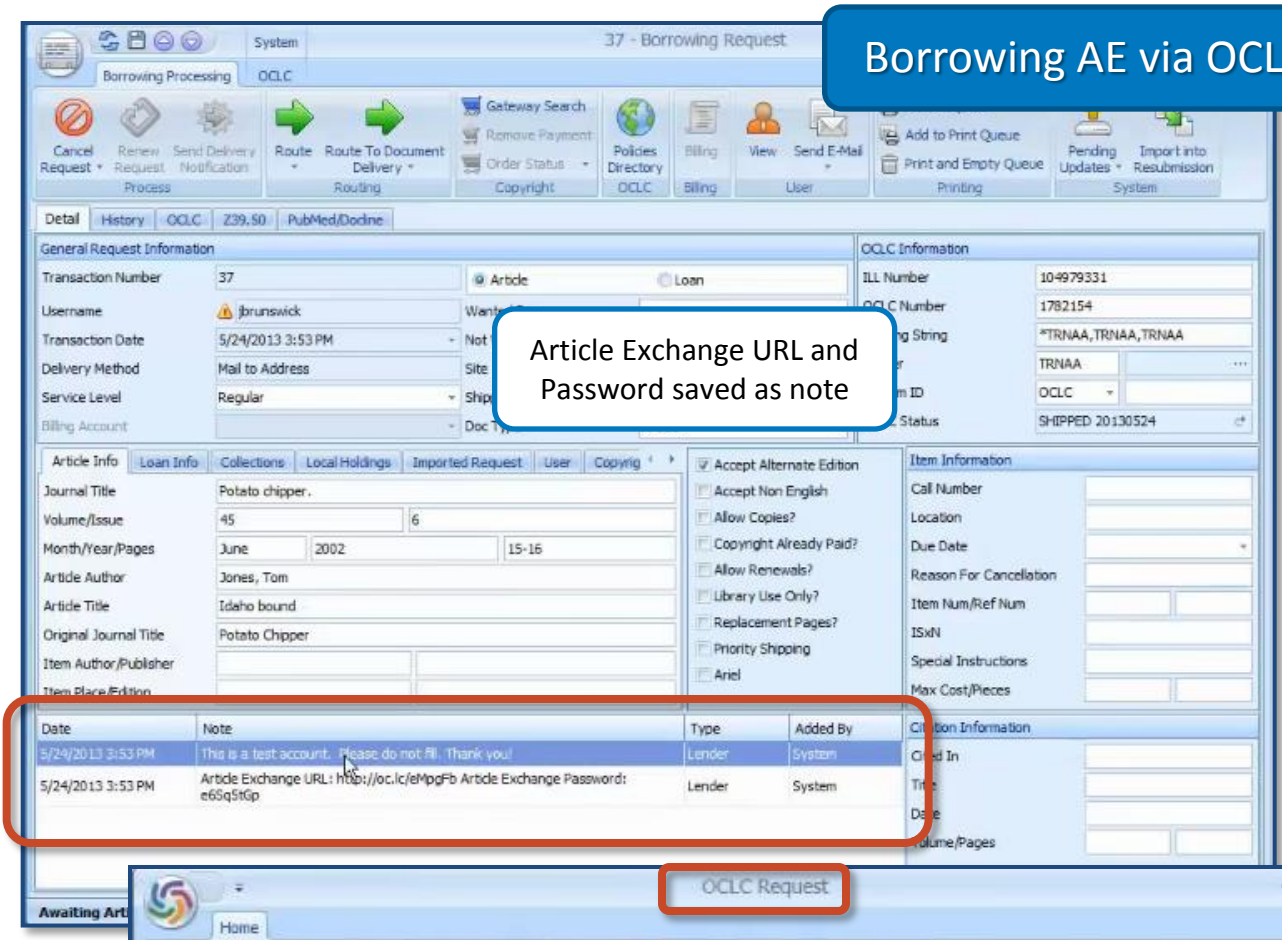
Borrowing

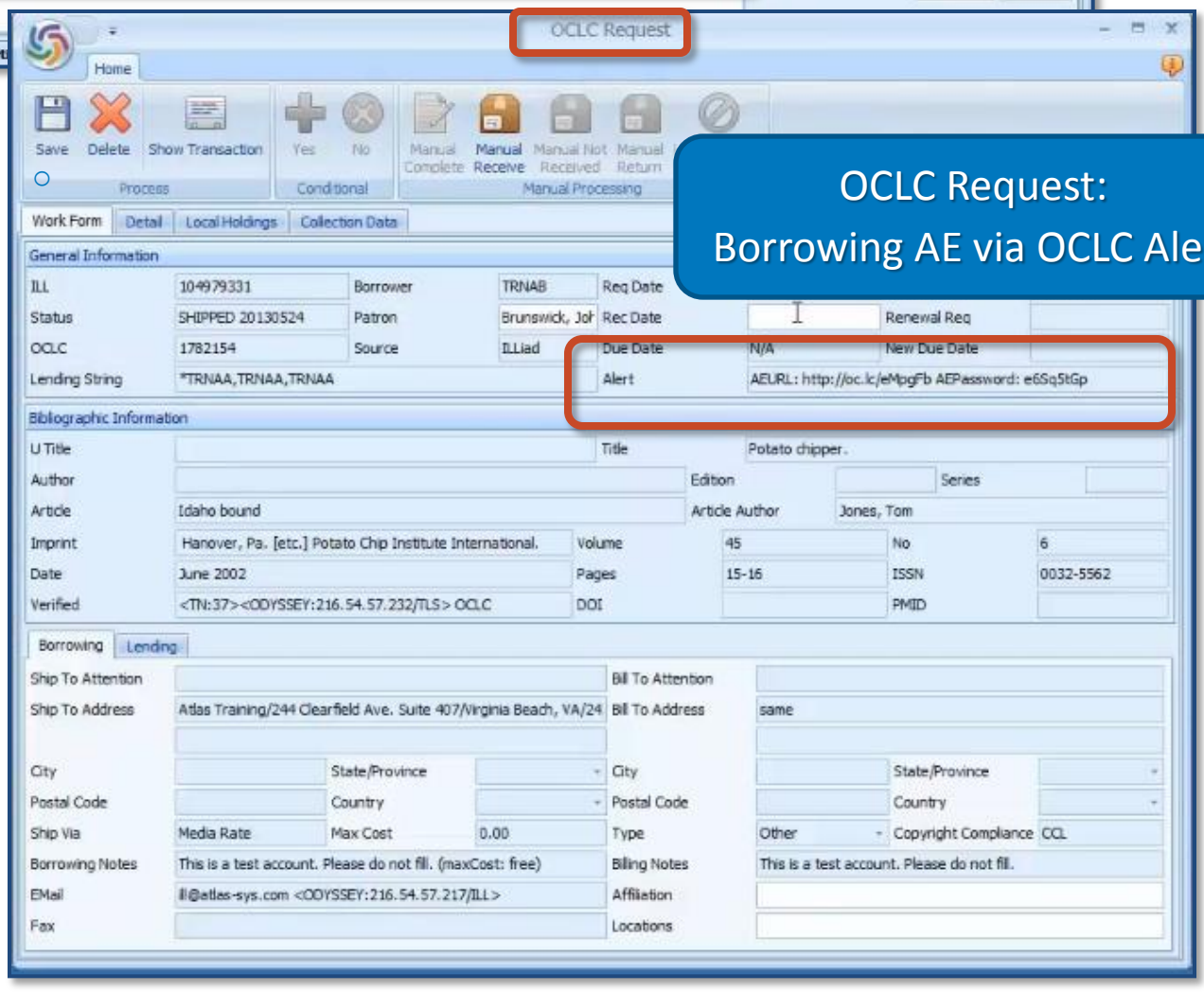
- Workflow: Two Scenarios
  - Alert field info—i.e. from another ILLiad or OCLC library
    - No warning in Connection Manager
    - Processed as Odyssey item
      - Trusted sender = Always → Delivered to Web
      - Trusted sender = Trusted, Never → Awaiting Odyssey Processing
  - Received via email
    - Manual addition at Check In from Lending Library

        - Add both URL and password
            - Warning if both not provided
        - Use **Check In** option
        - Processed as Odyssey item
- New Statuses
    - **Awaiting Article Exchange Retrieval**
        - Temporary status that system will update
    - **Awaiting Article Exchange Review**
        - Error status if ILLiad cannot access the AE Service or not .pdf or .tiff file type
- Will only handle .tif or .pdf file types
    - **Awaiting Article Exchange Review** if not
- Trusted sender
    - Associated keys in Customization Manager
        - System | Article Exchange | ArticleExchangeTrusted
            - Always, Trusted, Never
            - Same Trusted value in Lender Address record is used for both Odyssey and Article Exchange
- Overrides Trusted Sender if
    - Billing not exempt or user prefers print delivery



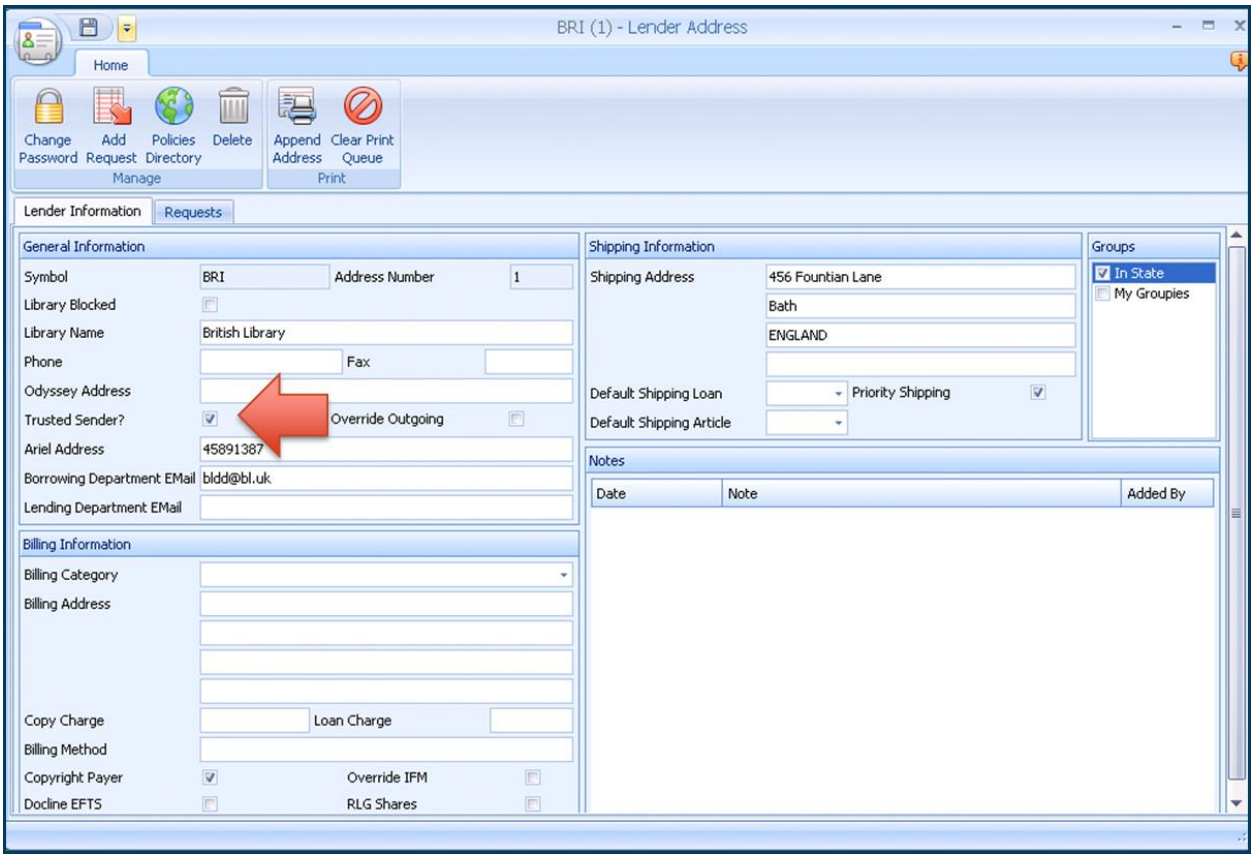
Borrowing AE via OCLC Alert





Trusted Sender

- Allows electronic document delivery to patron direct upon receipt from lending library **without staff intervention**
- When **billing** is active for Borrowing, Trusted Delivery functions only for customers exempt from billing
- Activate for all or for individual lenders
    - **Trusted Sender** option on Lender Address records
- Customization Manager Setting
    - Odyssey | Trusted |OdysseyAutoElecDel
        - Always = All
        - Never= No One
        - Trusted = As set in **Lender Address** record



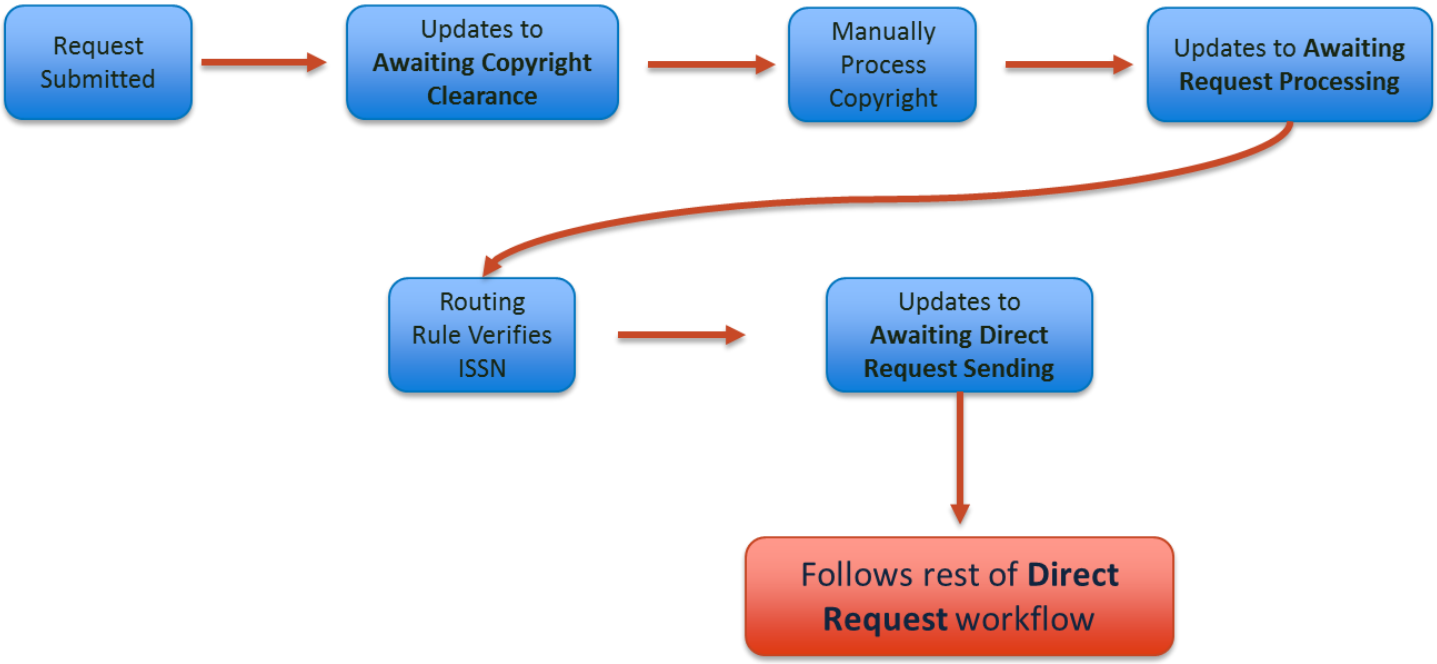
WorldCat Knowledge Base (KB)—Borrowing

- Borrowing benefits
    - Target other KB libraries for improved turn-around time
    - Identifies owned items and provides URL to redirect the request back to patron
- Borrowing processing
    - Used in conjunction with Direct Request
    - Can be activated manually through routing or automated with system routing rules

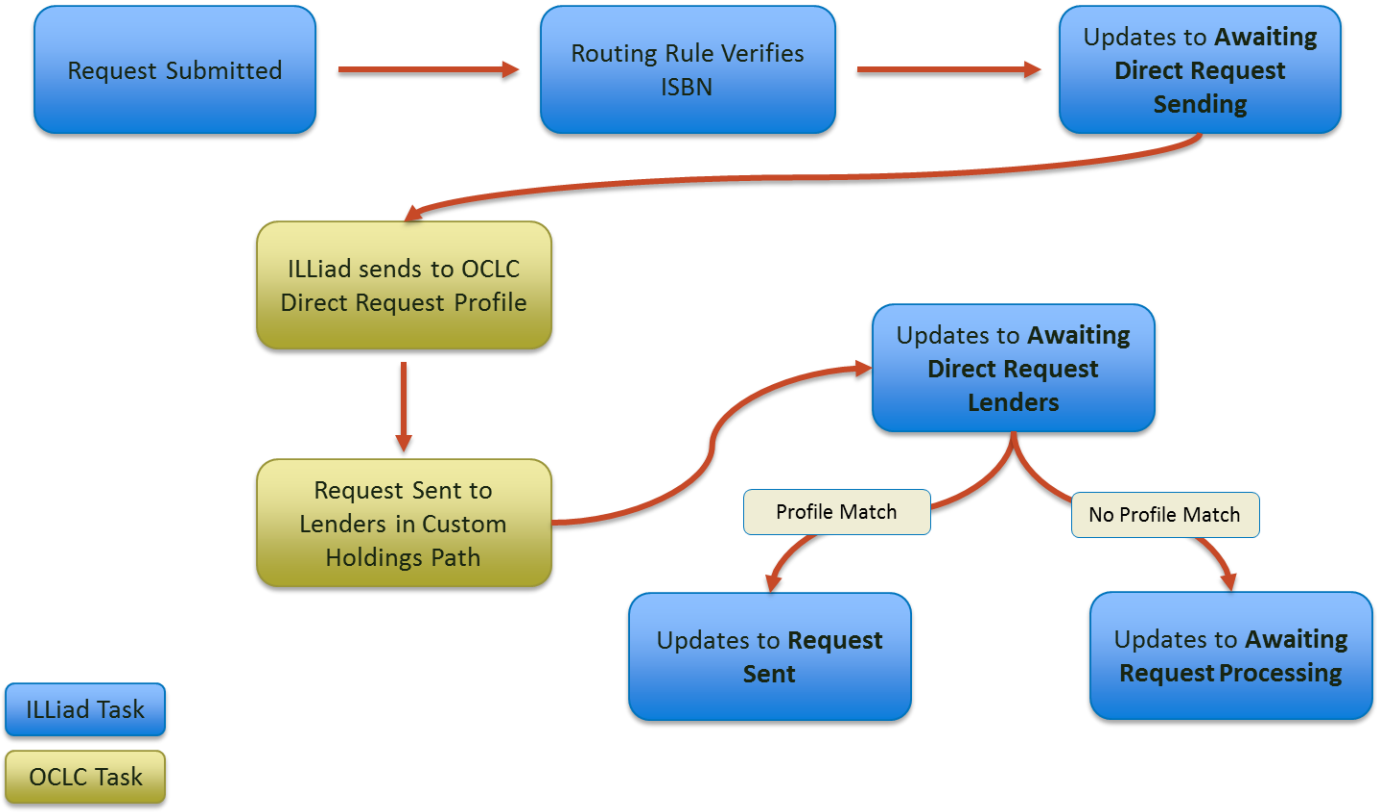
Modifications required

- Add **Article** to default Direct Request **routing rule**
- Add custom holdings group for KBILL
- KBIL = OCLC group for KB members with holdings active in KB
- Add KBIL group to Custom Holdings Path
- Modify Direct Request Profile
- Include Copy
- Change and/or add custom holdings path

Copyright Processing and Direct Request for Articles



Direct Request Workflow

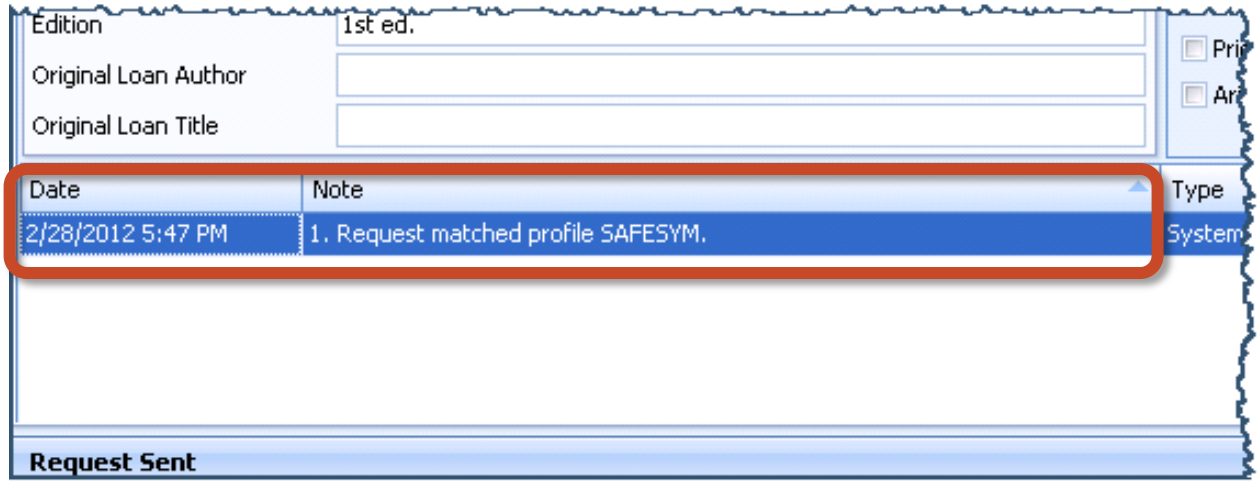


Borrowing Basic Article Routing Rule

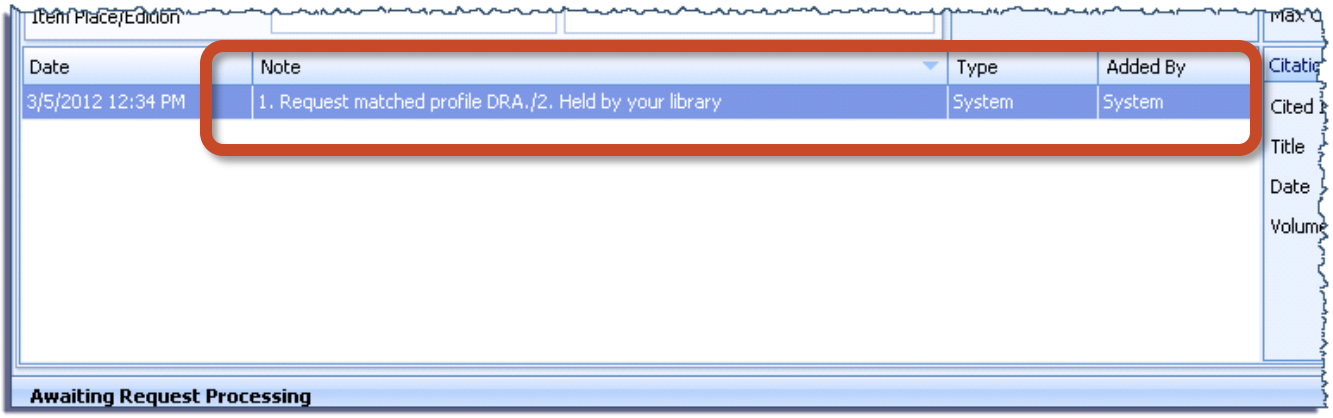
Sent to Direct Request after Copyright Clearance Processing

Field Name	Entry
Rule Number	0
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Request Processing
Match String	t.ISSN > '' and t.RequestType = 'Article' and (t.LendingString = '' or t.LendingString is NULL)
New Process Type	Borrowing
New Transaction Status	Awaiting Direct Request Sending
Rule Description	Direct Request rule for Articles

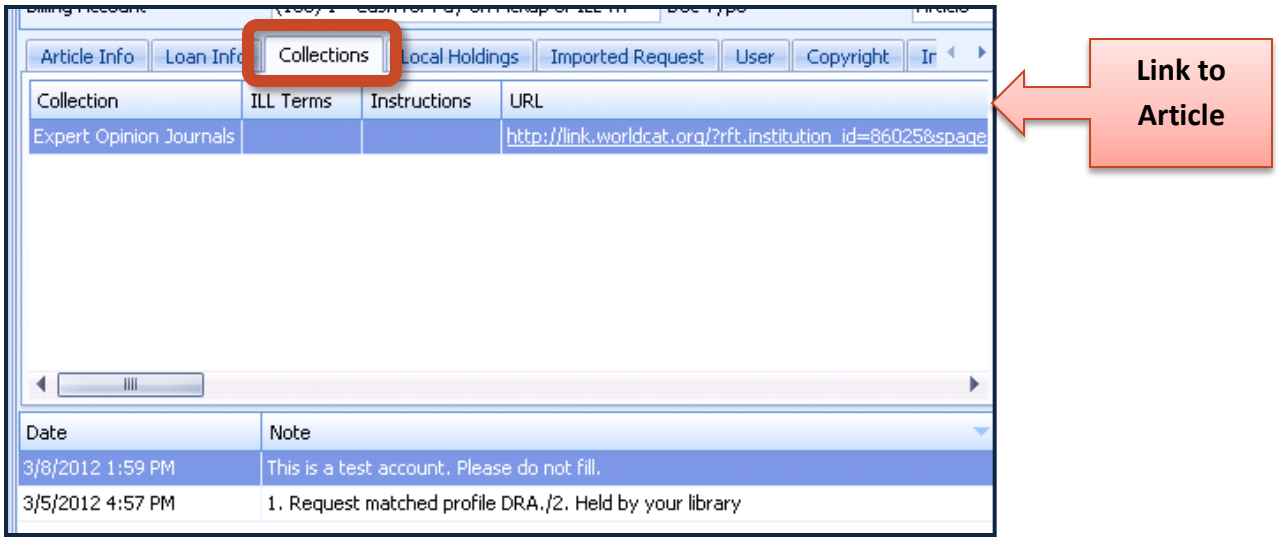
Successfully Sent via Direct Request
Notice in Notes field



Failed Direct Request
Notice of Ownership—returns to **Awaiting Request Processing**



Link Available in Collection Tab on Borrowing Request



For more on ebook borrowing see the following presentation notes from the 2012 ILLiad conference by Mary Radnor

http://www.atlas-sys.com/conference2012/presentations/eBook%20Resource%20Sharing%20Barriers%20and%20Options.pdf