ILLiad for Distance Education

Agenda

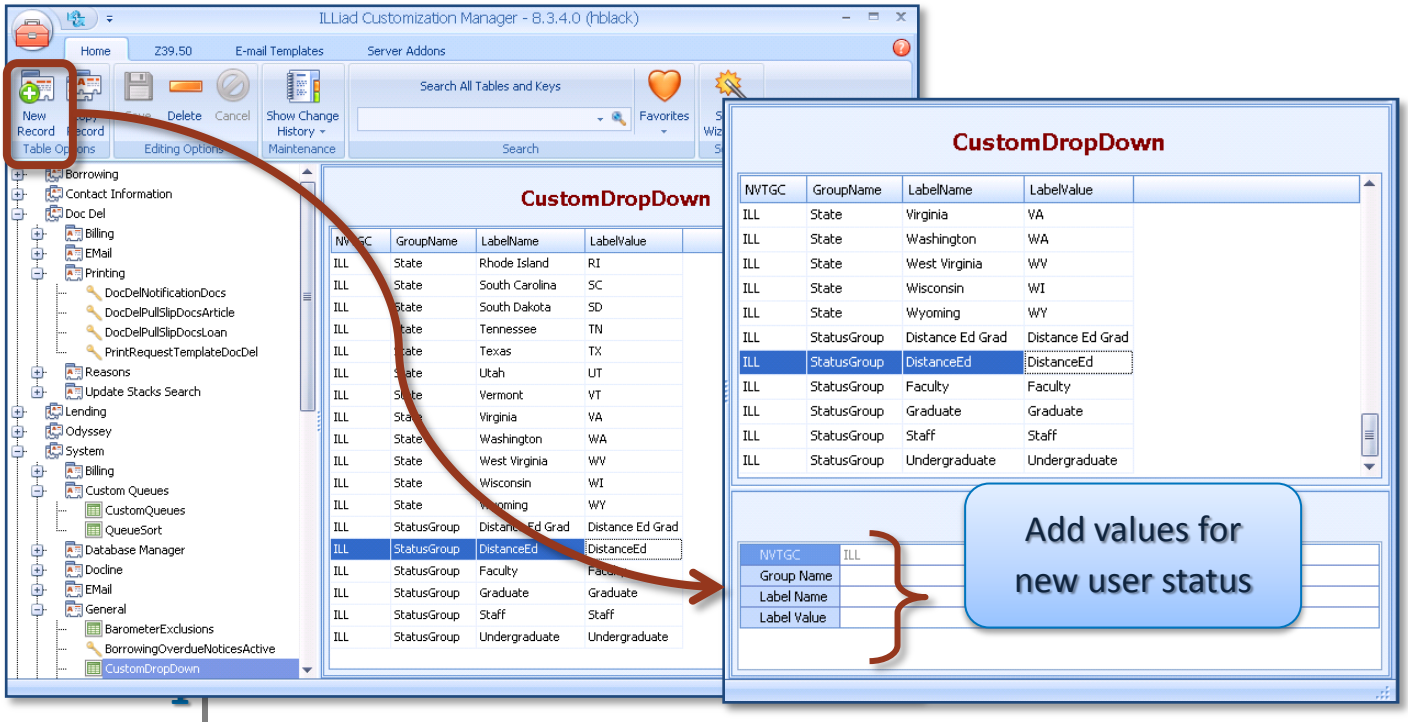
- Create User Status Values
- Potential Service Workflows
  - Manage requests in separate queue
    - Custom Queues
    - System Routing
  - Mail borrowed items to home address
    - Customized Print Templates
  - Offer delivery of locally owned materials
    - Customized Web Pages

At the end of the session, you should have the ability to customize ILLiad workflows that support remote learners.

Create User Status Values

Customization Manager Settings

- Adds option to User record in Client
- System | General | CustomDropDown
  - Add new record
    - New Record button
    - Add values
      - Group Name = Status Group
      - Label Name = DistanceEd
      - Label Value = DistanceEd



User Registration Form

Pages to edit depends on type of user authentication

- ILLiad Basic
  - NewUserRegistration, ChangeUserInformation
- All Others
  - NewAuthRegistration, ChangeUserInformation

NOTE:

Access to editing web pages will depend on how your server is hosted—locally or via hosting service at OCLC or Atlas.

- If local, check with your server administrator.
- If hosted, request FTP access from OCLC or Atlas.

Add **User Status** Option

```
<label for="StatusGroup">
    <span class="field">
        <span class="<#ERROR name="ERRORStatus">"><b>Status</b></span>
    </span>
    <select id="StatusGroup" name="StatusGroup" size="1" class="f-name" tabindex="4">
        <option selected><#PARAM name="StatusGroup"></option>
        <option>Graduate</option>
        <option>Faculty</option>
        <option>Staff</option>
        <option>Undergraduate</option>
        <option>Distance Ed Grad</option>
        <option>DistanceEd</option>
    </select><br />
</label>
```

```
<label for="LoanDeliveryGroup">
    <span class="field">
        <span class="<#ERROR name="ERRORLoanDeliveryGroup">"><b>Preferred Loan Delivery Method</b></span>
        <span class="note">NOTE: Mail to Address option available ONLY to Distance Education Students</span>
    </span>
    <select id="DeliveryGroup" name="LoanDeliveryGroup" size="1" class="f-name" tabindex="4">
        <option selected><#PARAM name="LoanDeliveryGroup"></option>
        <option>Hold for Pickup</option>
        <option>Mail to Address</option>
    </select><br />
</label>
```

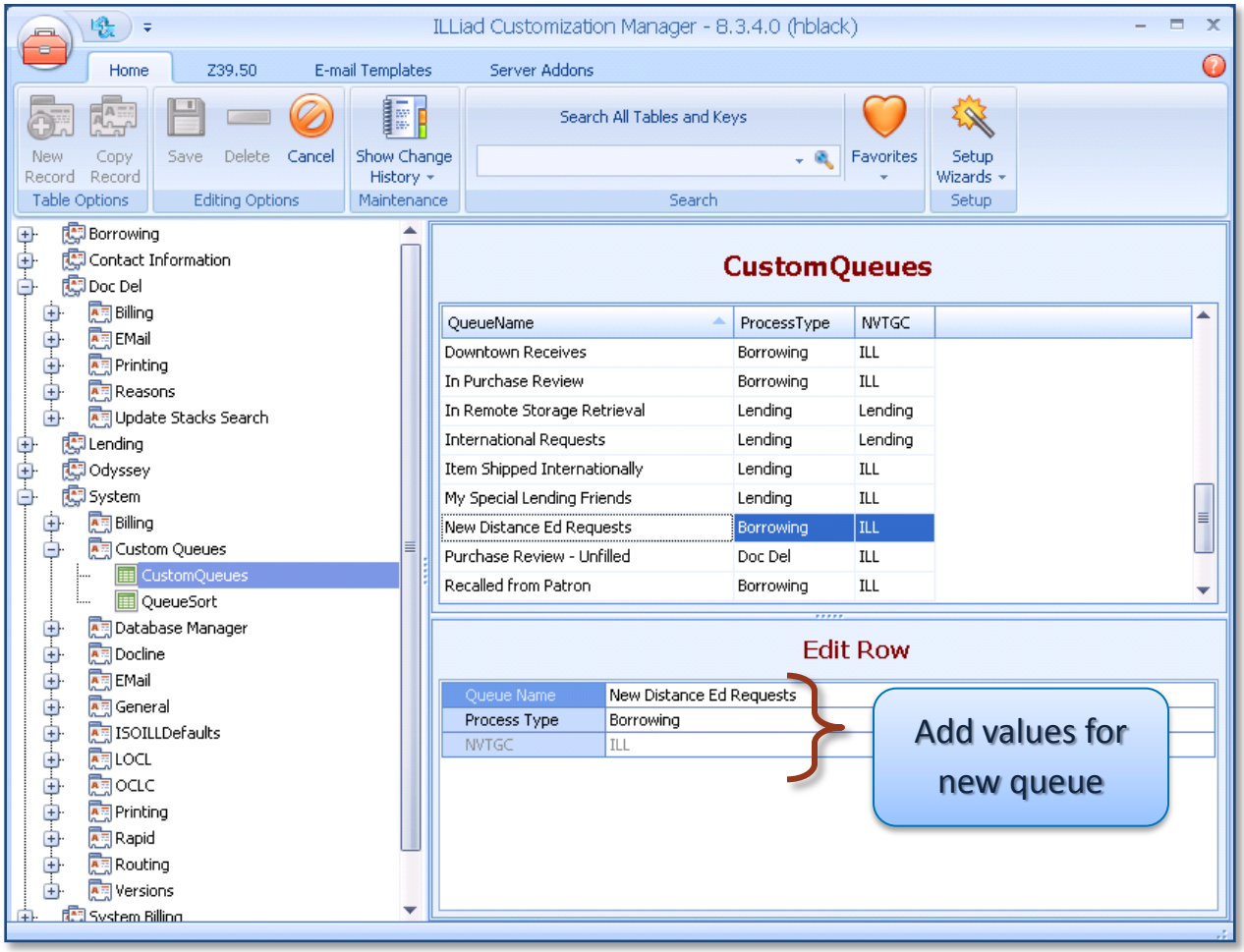
Add Note Regarding **Mail to Address** value

Workflow Options

Manage Requests in Separate Queue

Create Custom Queue

- Establish new queue to house requests
- Customization Manager
    - System | Custom Queues |CustomQueues
        - Queue Name = New Distance Ed Requests
        - Process Type = Borrowing
        - NVTGC = ILL or Shared Server site code



Create Routing Rule

What Is It?

- Allows the ILLiad system to do routine processing
- Automatically updates requests from one status to another based on your designed parameters
- Set variables for routing based on database fields
    - Such as Faculty Status, Request Type, Citation Information, and Transaction Status etc.
    - Can combine
- Create more efficient workflow by adding or skipping steps
- Not Routing as manually from Request form or Queue list

Some practical uses for routing

- Routing Distance Education student requests for special processing
- Routing Document Delivery requests from Borrowing to Document Delivery module
- Routing requests for specific document types to special queues
- Skipping print jobs for libraries with certain values in the Lender Address record

How do they Work?

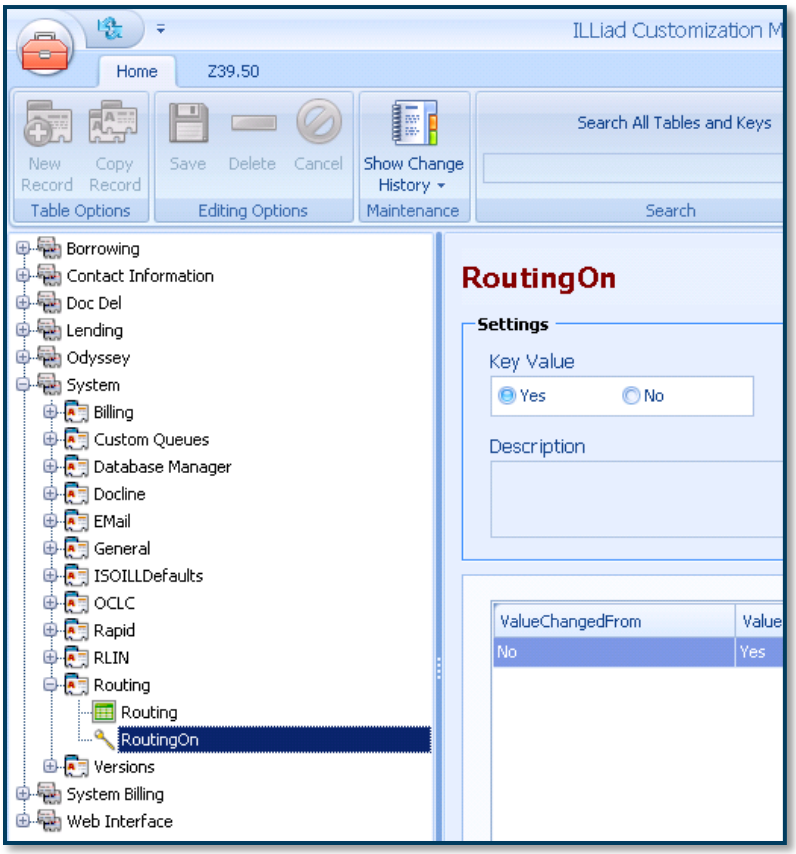
- Every update runs a SQL query
    - Request data is compared to "filter" in routing rule
    - First part of Routing Rule
- Match YES
    - Request auto-updated to new status
    - Second part of Routing Rule
- Match NO
    - Request moves to typical update status

Flip the Switch

Customization Manager Key RoutingOn should be set to Yes

System | Routing | RoutingOn

Customization Manager—Activate Routing



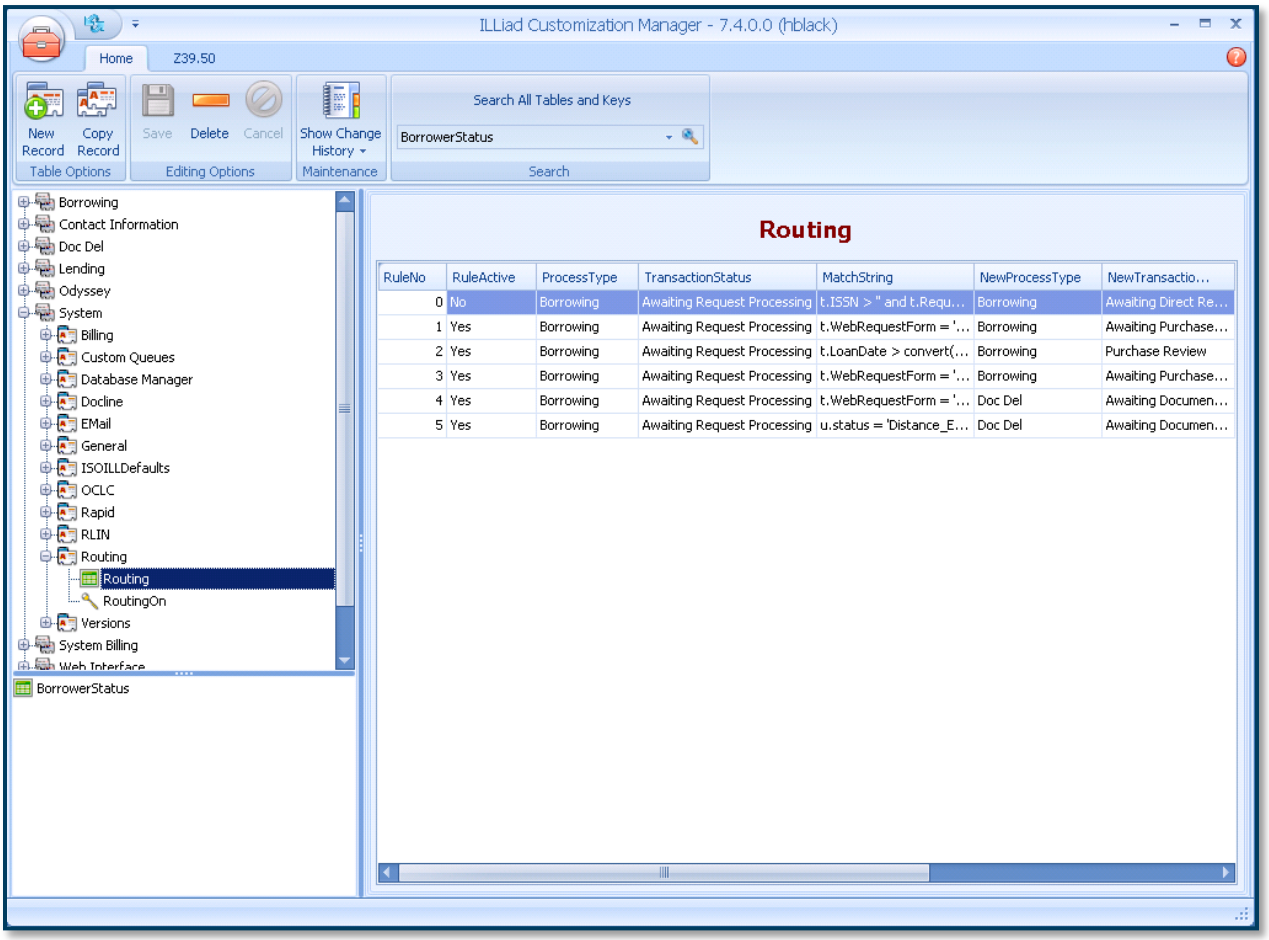
Routing Table

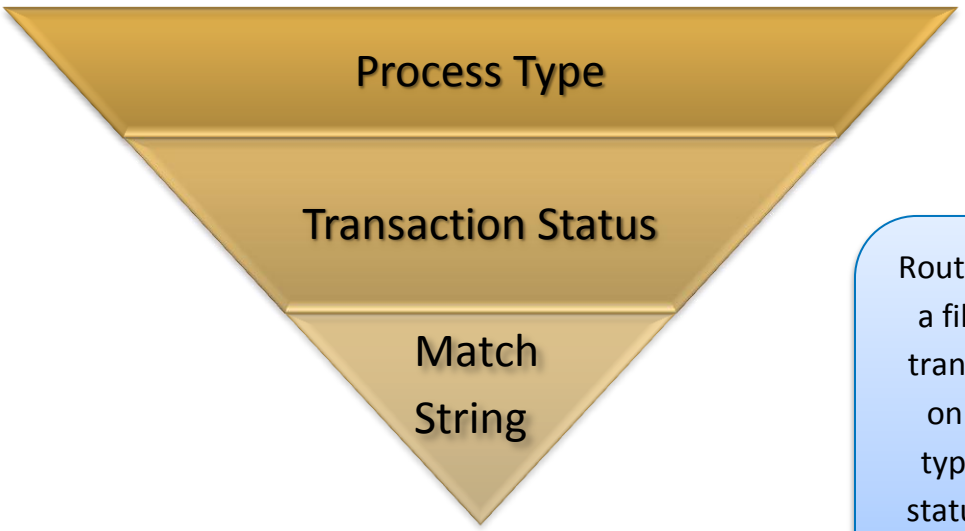
- Routing rules should be created so that no two routing rules apply to the same transaction at the same time
    - i.e. ProcessType, TransactionStatus, and MatchString values, taken collectively, should be unique for each rule in the table.
- Daisy-chaining of routing rules does not work

Routing Table Components

- Rule Number
- Rule Active
- Process Type
- Transaction Status
- Match String
- New Process Type
- New Transaction Status
- Rule Description

Customization Manager—Routing Table





Routing rules create a filter to identify transactions based on their process type, transaction status and a match string.

Rule Number

- RuleNo
- Unique rule number that you assign to the rule
- First rule that applies to a given transaction based on the rule definition is applied to the transaction.
    - In other words, the rules are applied in numerical order as a transaction meets conditions defined in each rule

Rule Active

- RuleActive
- Set to 'Yes' or 'No' to activate or deactivate
- A rule with a value of 'No' will be ignored by the system

Process Type

- ProcessType
- This specifies the ProcessType to which a given rule applies
- Rule applied when transaction has matching ProcessType value
- Three options
  > Borrowing > Lending > Document Delivery

Transaction Status

- TransactionStatus
- Specifies the TransactionStatus to which a given rule applies
- Rule applied when transaction has matching TransactionStatus value
- Any legitimate ILLiad status, including any existing Custom Queues
    - Examples = Awaiting Copyright Clearance, Awaiting Stacks Searching, Awaiting Shipping Label Printing

Match String

- MatchString
- Essential for effective processing
- Completes query string to create a match for transaction and allow application of rule
- Routing rules checked each time the status of a transaction changes to determine if any active routing rules should be applied to that transaction
- Sets the conditions that distinguish one routing rule from another

New Process Type

- NewProcessType
- Specifies the new process type to which the transaction will be routed when the rule is applied.
- Does not need to change
- Only between between Borrowing and Doc Del
- Lending transactions cannot change ProcessType

New Transaction Status

- Specifies the new Transaction Status to which the transaction will be routed when the rule is applied
- May be any legitimate ILLiad status, including any existing Custom Queue

Rule Description

- Describes the action of the rule
- Helpful when multiple rules exist
- Assists others who did not create the rule

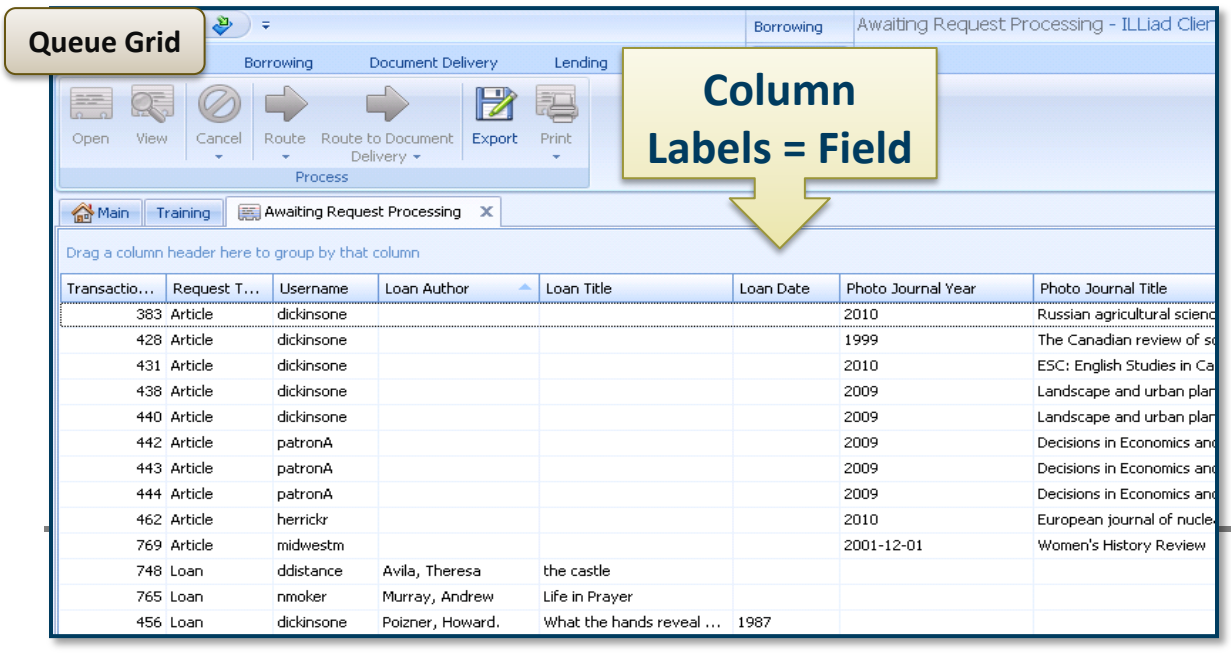
Match String

- Built from fields in ILLiad tables where request data is housed
- Tables/fields available for use in the match string
    - Lending
        - Transactions
        - LenderAddresses/LenderAddressesALL
    - Borrowing
        - Transactions
        - Users/UsersALL

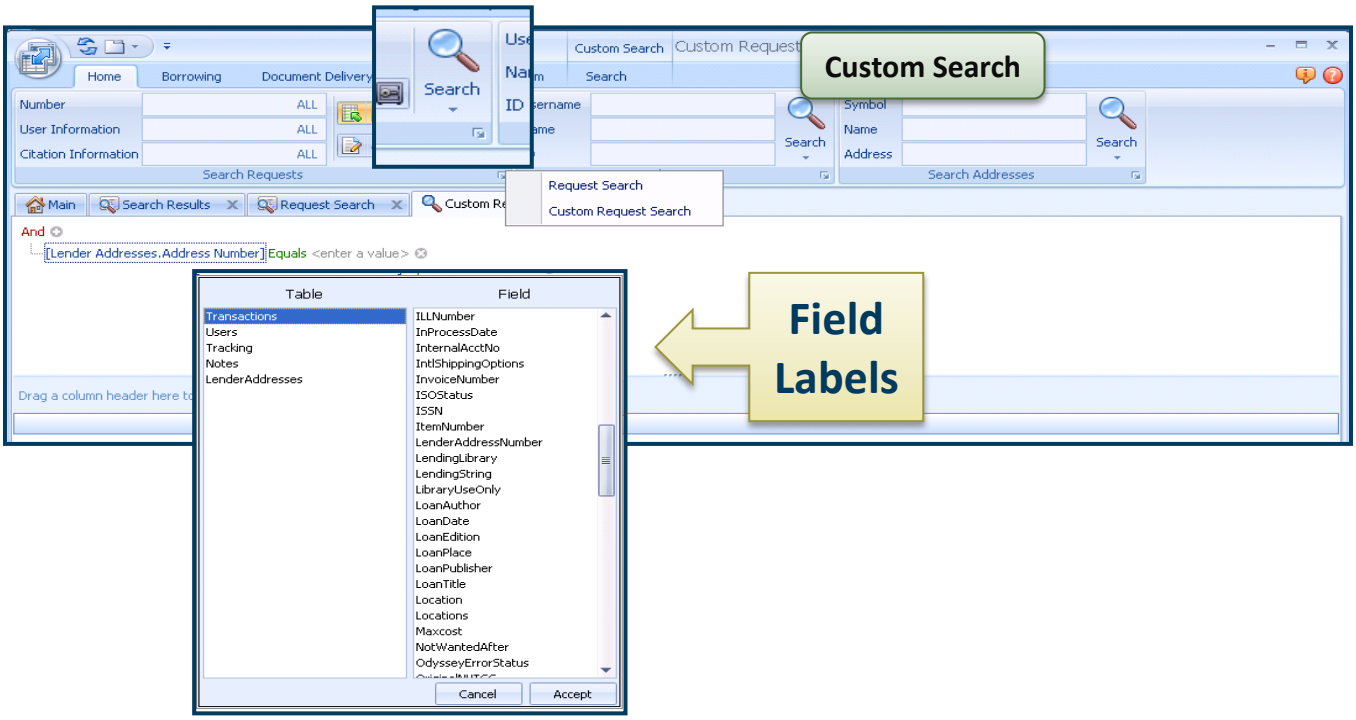
Match String Components

1) Table Field
2) Value Limit
    - Language (not quite SQL query) that targets values or content in that field
    - Example
        - u.Username = 'dickinsone'
        - Targets User Table where the Username is dickinsone
    - Locate field labels names in custom search or queue list grid

Queue List Grid and Custom Search to Locate Field Labels



Custom Search to Locate Field Labels



Match String Syntax

- Transactions Table
  - Syntax = t.fieldname
  - Example = t.TransactionNumber
- LenderAddresses Table
  - Syntax = l.fieldname
  - Example = l.LenderString
- Users Table
  - Syntax = u.fieldname
  - Example = u.Status
- Single quotes should be used around alpha character criteria
  - t.RequestType = 'Article'
- <> means not equal to
  - l.ArielAddress <> '' (two single quotes)
- LIKE % wildcard
  - u.Status LIKE '%Faculty%' matches VisitingFaculty and FacultyNew
- Checking for blanks or nulls
  - (t.LendingString = '' or t.LendingString is NULL)
  - (l.ArielAddress is not NULL and l.ArielAddress<> '')

Attend to Request Type

- Be aware of default workflow processes that may affect request types in different ways
- You may need to make 2 rules
    - Example in Borrowing
        - One for Articles starting at Awaiting Copyright Clearance
            - u.Status = 'Faculty' and t.RequestType = 'Article'
        - One for Loans starting at Awaiting Request Processing
            - u.Status = 'Faculty' and t.RequestType = 'Loan'

Routing Rules & Shared Servers

- Extra care needs to be taken when adding routing rules on a shared server. The routing table is a shared table and a rule can potentially affect all sites.
- Make sure to add your site code as part of the matchstring:
    - u.NVTGC = 'ABC'
    - u.NVTGC in ('ABC','XYZ')

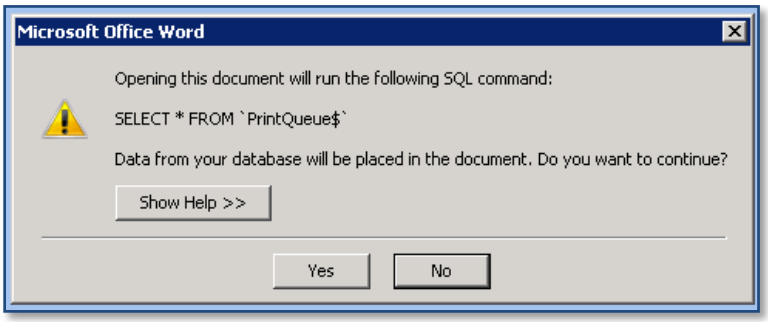
Example

Route Distance Ed Requests to Dedicated Processing Queue

Field Name	Entry
RuleNo	[next available]
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	u.Status = 'DistanceEd'
NewProcessType	Borrowing
NewTransactionStatus	New Distance Ed Requests
Rule Description	Routes all requests from Distance Ed status in patron record to a separate queue

Identify Items for Home Delivery

- Create new **Word** template
  - Create new version of document for **Print Receives** (Borrowing) and/or **Pull Slip** (DocDel) from existing document
  - Open Word Document
    - *Suggested Option: copy another template and edit*
    - **Locate** print templates in directory
      - Customization Manager
        - System | General |PrintDocumentsPath
    - Navigate to file and open document
    - Click **Yes** when prompted to run SQL command

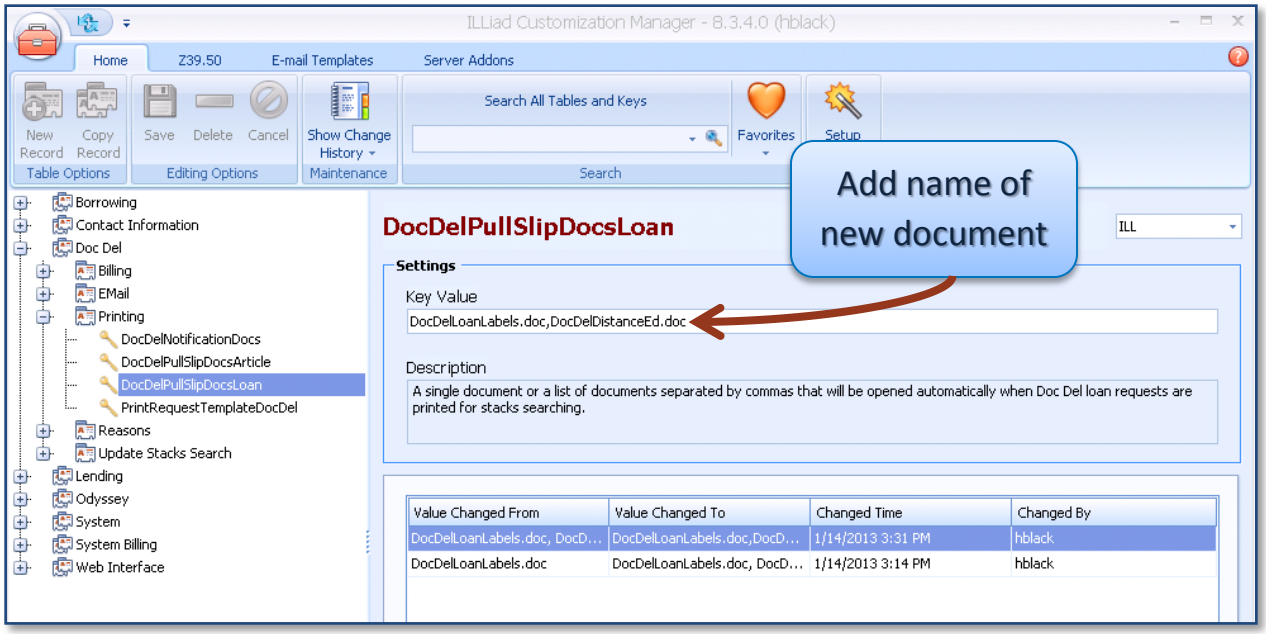


  - Link to Data Source
    - **Select Recipient** > **Use Existing List** function in Word **Mailings** ribbon
    - Navigate to appropriate Excel file
      - Versions 8.1-8.2
        - C:\Program Files\ILLiad\Print
      - Version 8.3
        - C:\My Documents\ILLiad\Print
    - Select **Print** table
  - Add/edit Word Mail Merge fields
    - To add content from ILLiad request data
      - **Mailings** ribbon > **Insert Merge Field** option
    - Use Word document editing tools to change fonts, layout, etc.
  - Save file in folder as directed in Customization Manager key
    - System | General | PrintDocumentsPath

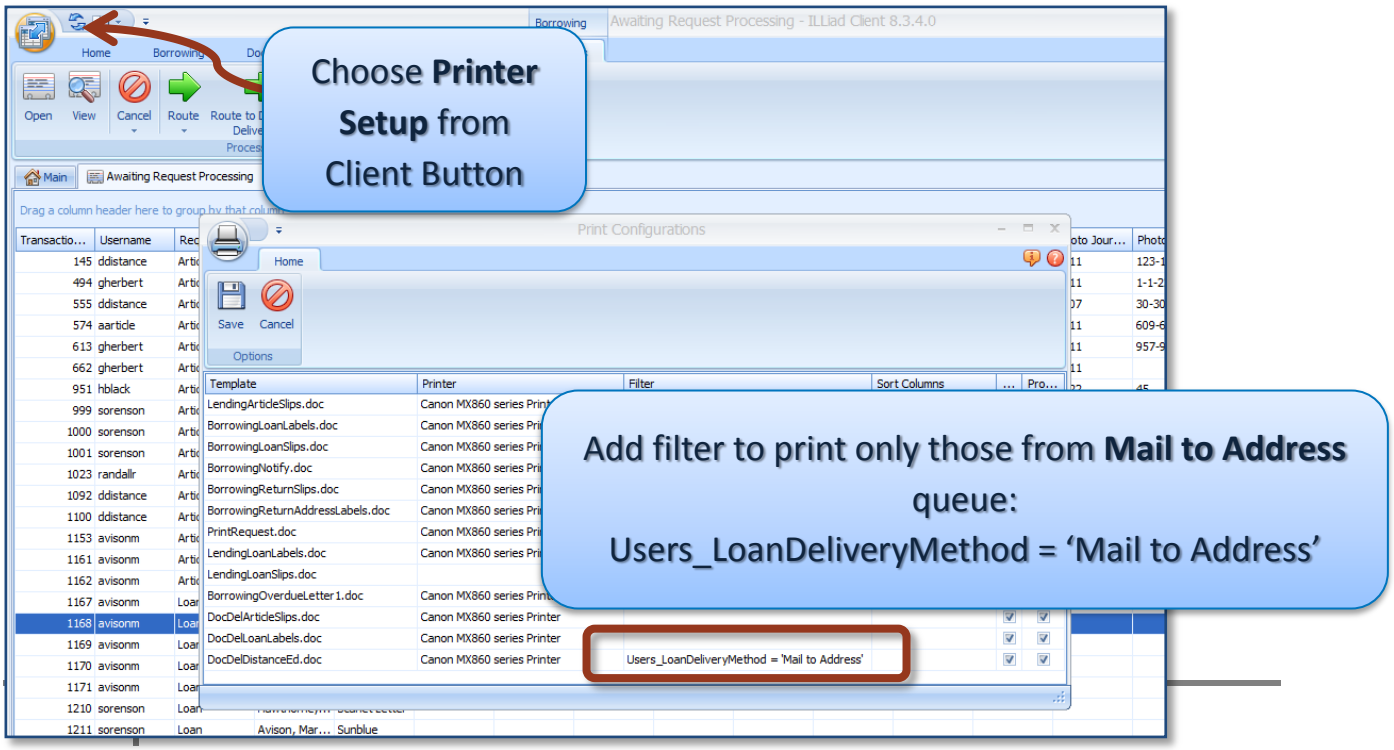
CAUTION

- Do not delete **<<Next Record>>** indicator
- Any edits to one template must be made to all other templates on the page

- Add new document to **Customization Manager** print settings
    - Borrowing
        - Borrowing |Printing | BorrowingPrintReceivesDocsLoan
    - Document Delivery
        - Doc Del | Printing |DocDelPullSlipDocsLoan



- Add printing filter to **Client** for standard and new document
    - Create filter to specify document for designated delivery method for each document



Using Document Delivery

Document delivery module can be used as the primary module for requests from remote learners. Its default workflow is designed to route requests from your patrons for fulfillment from your collection.

- Use for all requests or just loans
- Route manually or use routing rule based on user status or form type

Manually Route to Document Delivery

- Transactions begin as borrowing request
- Identified as locally owned
  - Save **Location** Information to request
- Click **Route to Document Delivery** button in Processing Ribbon
  - Request updated to **Awaiting Document Delivery Processing**
  - **Awaiting Document Delivery Processing** queue is available in the Document delivery group on the **Main Tab**
- Add **Due Date** for loan items
- Requests now need to be moved to **Awaiting Document Delivery Stacks Searching** in order to print Pull Slips

[The Awaiting Document Delivery Stacks Searching queue is a new queue in Document Delivery added to make the Document Delivery process a completely separate process from Borrowing.]

- Two options to route a request once in Doc Del status
  - Open the request from the Awaiting Document Delivery Processing queue and click **Finished Searching** on the Document Delivery Processing Ribbon
  - Open the Awaiting Document Delivery Processing queue and select the requests you want to move. Route the requests to **Awaiting DD Stacks Searching** using the **Route icon** on the Process ribbon.

Workflow Time Saver!

-Route Borrowing Requests directly to **Awaiting DD Stacks Searching** by clicking the bottom half of the **Route to Document Delivery** button and select **Awaiting DD Stacks Searching**

-Request will queue for printing

Stacks Searching

- Click **Print Pull Slips** button on Document Delivery Ribbon
  - Requests updated to **In DD Stacks Searching**
- Use pull slips to search stacks
- Click **Update Stacks Search** button on the Document Delivery ribbon
  - Retrieve request records with transaction number or citation information

Found Items—Articles

- Two Processing Options
  - Mark Found Scan Now
  - Mark Found Scan Later
- Mark Found Scan Now
  - Click **Mark Found Scan Now** from the Doc Del ribbon
    - Scan and post the article immediately as a part of the Stacks Search update process
    - Automatic updated through **Awaiting Doc Del Scanning** and **Odyssey Document Received** to **Delivered to Web**
    - Patron notification email sent when updated to **Delivered to Web**
- Mark Found Scan Later
  - Click **Mark Found Scan Later** from the Doc Del ribbon
    - Scanning and posting the item may take place at some other time or on some other workstation
    - Updated to **Awaiting Doc Del Scanning**
    - After scanning, automatically updated through **Odyssey Document Received** to **Delivered to Web**
    - Patron notification email sent when updated to **Delivered to Web**

Found Items—Loans

- Click **Mark Found** from the Doc Del ribbon
- *This workflow assumes that circulation tracking of item will occur in your local catalog check out system*
- Request updated to **Awaiting Doc Del Customer Contact**
- Create Routing Rule to skip **Contact Customers** processing
- Use customized pull slip to identify item for shipping

Custom Web Pages for Distance Ed Students

You are able to create web forms that will appear only for those with a particular user status. These are known as status-specific forms.

- Create the New Request Form
    - Recommended Method: Use Existing Web Request Form
        - Open similar request form
            - For loan delivery request use **LoanRequest.html**
        - Save As <new filename>
            - New file name must begin with ***GenericRequest***
            - To make the page viewable only to a particular status add **–** ***NewStatusName*** end of name but before .html
              Example: **GenericRequestDocDel-DistanceEd.html**
        - Edit page to suit needs
            - Add/Modify **Descriptive Text** for Display
            - Add/Modify the **Identifier Code**
                - <input type="hidden" name="ILLiadForm" value="GenericRequestDocDel-DistanceEd">
                - <input type="hidden“ name="RequestType" value="Loan">
                - <input type="hidden“ name="DocumentType" value="Purchase">
        - Add or remove **Labels**
    - Repeat with the Edit Request Form
      (Example: **EditGenericRequestDocDel-DistanceEd.html**)
    - Create **Include Menu**
        - Use same method as above to create status specific menu to include new request form
        - Open similar include menu
        - Save As <new filename>
            - To make the menu viewable only to a particular status add **–** ***NewStatusName*** end of name but before .html
              Example: **include_menu-DistanceEd.html**
            - Add reference link to new form structured as example below
                - <a href="<#ACTION action="10" form="20" value="**GenericRequestDocDel-DistanceEd**">">**Distance Ed Delivery Request**

Delivery Request Form

Text Added or Changed

Text Deleted

Modified from Loan Request Form

```
<html>
<head>
<title>ILLiad – Distance Ed Delivery Request</title>
<link rel="stylesheet" type="text/css" href="css/main.css" media="screen" />
<link rel="stylesheet" type="text/css" href="css/print.css" media="print" />
<!--[if lte IE 6]>
<link rel="stylesheet" type="text/css" href="css/ie6_or_less.css" />
<![endif]-->
</head>
<body id="type-b">
<div id="wrap">
  <#INCLUDE filename="include_header_request.html">
  <div id="content-wrap">
            <#INCLUDE filename="include_menu.html">
    <div id="content">
      <form action="illiad.dll" method="post" name="GenericRequestDocDel-DistanceEd" class="f-wrap-request">
        <input type="hidden" name="ILLiadForm" value="GenericRequestDocDel-DistanceEd">
        <input type="hidden" name="Username" value="<#PARAM name="Username">">
        <input type="hidden" name="SessionID" value="<#PARAM name="SessionID">">
        <input type="hidden" name="RequestType" value="Loan">
        <input type="hidden" name="DocumentType" id="DocumentType" value="DocDelRequest">
        <div class="req"><b>*</b> Indicates required field</div>
        <fieldset>
            <h3>Request Item for Home Delivery</h3>
                        <#STATUS>
        ~~<h2>Describe the item you want</h2>~~

            <label for="LoanAuthor">
                        <span class="field">
                <span class="req">*</span>
                        <span class="<#ERROR
                        name="ERRORLoanAuthor">"><b>Author/Editors</b></span>
                        </span>
              <input id="LoanAuthor" name="LoanAuthor" type="text" size="40" class="f-name" tabindex="1"
value="<#PARAM name="LoanAuthor">"><br />
            </label>

            <label for="LoanTitle">
                        <span class="field">
                        <span class="req">*</span>
                        <span class="<#ERROR name="ERRORLoanTitle">"><b>Title</b></span><br
                        />
                <span class="note">Please do not abbreviate unless your citation is abbreviated</span>
                        </span>
              <textarea id="LoanTitle" name="LoanTitle" rows="2" cols="40" class="f-name" tabindex="2"><#PARAM
name="LoanTitle"></textarea><br />
            </label>

          <label for="LoanPublisher">
                        <span class="field">
                <span class="<#ERROR name="ERRORLoanPublisher">"><b>Publisher</b></span>
                        </span>
```

```
                    <input id="LoanPublisher" name="LoanPublisher" type="text" size="40" class="f-name" tabindex="3"
value="<#PARAM name="LoanPublisher">"><br />
                </label>

                <label for="LoanPlace">
<span class="field">
          <span class="<#ERROR name="ERRORLoanPlace">"><b>Place of Publication</b></span>
                                                                    </span>
           <input id="LoanPlace" name="LoanPlace" type="text" size="40" class="f-name" tabindex="4" value="<#PARAM
name="LoanPlace">"><br />
             </label>

             <label for="LoanDate">
                    <span class="field">
                                                                                <span class="<#ERROR
name="ERRORLoanDate">"><b>Date of Publication</b></span>
                                                                    </span>
                     <input id="LoanDate" name="LoanDate" type="text" size="40" class="f-name" tabindex="5"
value="<#PARAM name="LoanDate">"><br />
             </label>

                    <label for="ISSN">
                                                <span class="field">
                       <span class="<#ERROR name="ERRORISSN">"><b>ISBN (International Standard Book
Number)</b></span><br />
                    <span class="note">If given will speed request processing</span>
                                                </span>
                    <input id="ISSN" name="ISSN" type="text" size="20" class="f-name" tabindex="7" value="<#PARAM
name="ISSN">"><br />
                </label>

                <label for="CallNumber">
                                                <span class="field">
                                                        <span class="<#ERROR name="ERRORCallNumber">"><b>Call
                                                        Number</b></span>
                                                </span>
                    <input id="CallNumber" name="CallNumber" type="text" size="20" class="f-name" tabindex="8"
value="<#PARAM name="CallNumber">"><br />
                </label>

                <label for="ESPNumber">
                                                <span class="field">
                        <span class="<#ERROR name="ERRORESPNumber">"><b>OCLC or Docline UI Number</b></span>
                                                </span>
                    <input id="ESPNumber" name="ESPNumber" type="text" size="20" class="f-name" tabindex="9"
value="<#PARAM name="ESPNumber">"><br />
                </label>

                <label for="NotWantedAfter">
                                                <span class="field">
                        <span class="req">*</span><span class="<#ERROR name="ERRORNotWantedAfter">"><b>Not Wanted
After Date</b></span><br />
                                                        <span class="note">(MM/DD/YYYY)</span>
                                                </span>
                    <input id="NotWantedAfter" name="NotWantedAfter" type="text" size="40" class="f-name" tabindex="10"
value="<#PARAM name="NotWantedAfter">"><br />
                </label>
```

```
            <label for="AcceptNonEnglish">
                                        <span class="field">
                        <span class="<#ERROR name="ERRORAcceptNonEnglish">"><b>Will you accept the item in a language
other than English?</b></span><br />
                        <span class="note">If yes, specify acceptable languages in the notes field.</span>
                                        </span>
                    <select id="AcceptNonEnglish" name="AcceptNonEnglish" size="1" class="f-name" tabindex="11">
                      <option selected><#PARAM name="AcceptNonEnglish"></option>
                      <option>No</option>
                      <option>Yes</option>
                    </select>
                                        <br />
            </label>

            <label for="AcceptAlternateEdition">
                                        <span class="field">
                        <span class="<#ERROR name="ERRORAcceptAlternateEdition">"><b>Will you accept an alternate edition
of this item?</b></span>
                                        </span>
                    <select id="AcceptAlternateEdition" name="AcceptAlternateEdition" size="1" class="f-name" tabindex="12">
                      <option selected><#PARAM name="AcceptAlternateEdition"></option>
                      <option>No</option>
                      <option>Yes</option>
                    </select>
                    <br />
            </label>

            <label for="AccountNo">
                                        <span class="field">
                        <span class="<#ERROR name="ERRORAccountNo">"><b>Account Number</b></span>
                                        </span>
                    <select id="AccountNo" name="AccountNo" size="1" class="f-name" tabindex="13">
                      <#OPTION name="ValidAccounts">
                    </select>
                    <br />
            </label>


            <label for="Notes">
                                        <span class="field">
                        <span class="<#ERROR name="ERRORNotes">"><b>Notes</b></span><br />
                        <span class="note">Put any information here that may help us find the item, as well as any other
pertinent information.</span>
                                        </span>
                    <textarea id="Notes" name="Notes" rows="2" cols="40" class="f-name" tabindex="14"><#PARAM
name="Notes"></textarea><br />
            </label>

 <#INCLUDE filename="include_request_cited.html">
<#INCLUDE filename="include_request_buttons.html">
          </fieldset>
        </form>
        <#INCLUDE filename="include_footer.html">
      </div>
    </div>
</div>
</body>
</html>
```

Include Menu

```
<div id="utility">
        <ul id="nav">
                <li class="active"><a href="<#ACTION action="99">">Logoff <#PARAM name="Username"></a></li>
                <li class="active"><a href="<#ACTION action="10" form="10">">Main Menu</a></li>


                <li class="active"><a href="#">New Request</a>
                        <ul>
              <li class="first"><a href="<#ACTION action="10" form="22">">Photocopy</a></li>
                                <li><a href="<#ACTION action="10" form="21">">Book</a></li>
                                <li><a href="<#ACTION action="10" form="23">">Book Chapter</a></li>
                                <li><a href="<#ACTION action="10" form="20" value="GenericRequestDocDel-
                                DistanceEd">">Home Delivery Request</a></li>
                                <!--<li><a href="<#ACTION action="10" form="24">">Conference Paper</a></li>
                                <li><a href="<#ACTION action="10" form="25">">Patent</a></li>
                                <li><a href="<#ACTION action="10" form="26">">Report</a></li>
                                <li><a href="<#ACTION action="10" form="27">">Thesis</a></li>
                                <li><a href="<#ACTION action="10" form="28">">Standards Document</a></li>
                                <li class="last"><a href="<#ACTION action="10" form="29">">Other (Free Text)</a></li>-->
                        </ul>
                </li>
                <li class="active"><a href="#">View</a>
                        <ul>
                                <li class="first"><a href="<#ACTION action="10" form="62">">Outstanding Requests</a></li>
                                <li><a href="<#ACTION action="10" form="64">">Electronically Received Articles</a></li>
                                <li><a href="<#ACTION action="10" form="66">">Checked Out Items</a></li>
                                <li><a href="<#ACTION action="10" form="70">">Cancelled Requests</a></li>
                                <li><a href="<#ACTION action="10" form="68">">History Requests</a></li>
                                <li><a href="<#ACTION action="10" form="60">">All Requests</a></li>
                                <li class="last"><a href="<#ACTION action="10" form="73">">Notifications</a></li>
                        </ul>
                </li>
                <li class="active"><a href="#">Tools</a>
                        <ul>
                                <li class="first"><a href="<#ACTION action="10" form="81">">Change User Information</a></li>
                                <li><a href="<#ACTION action="10" form="82">">Change Accounts</a></li>
                                <li class="last"><a href="<#ACTION action="10" form="83">">Change Password</a></li>
                        </ul>
                </li>
                <li class="active"><a href="<#ACTION action="10" form="1">">About ILLiad</a></li>
        </ul>
</div>
```

Workflow Options

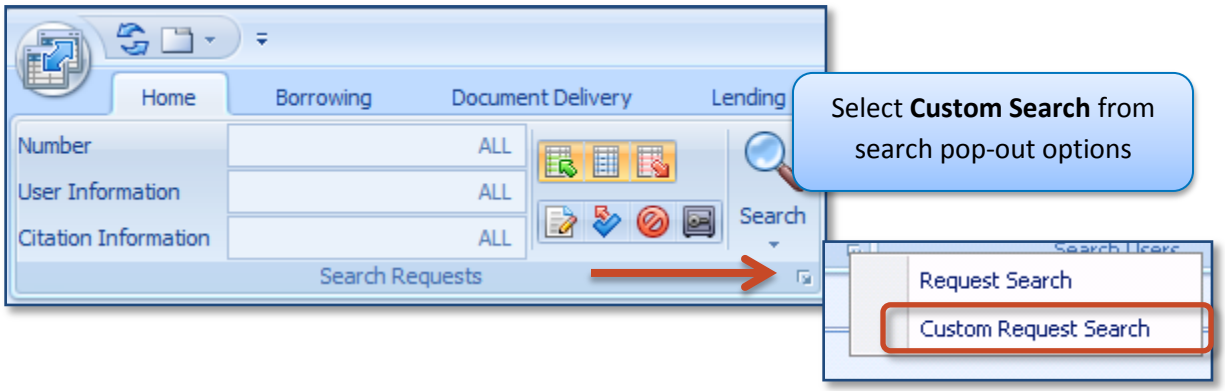
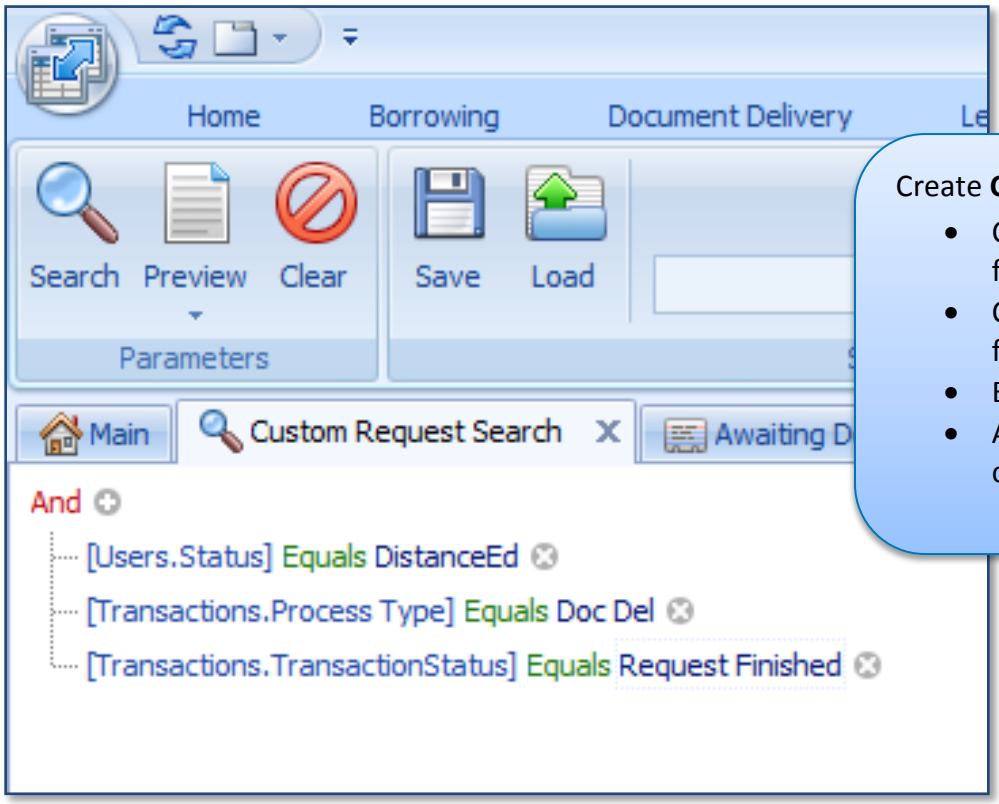
Routing Based on Status

Create Routing Rule to route all loan requests from Distance Education Students to special queue in Borrowing or Document Delivery.

- Borrowing
    - Review requests for local ownership
    - If **not** owned
        - Process as traditional ILL
        - When received, create alternate **Print Receives** document to identify as Distance Ed and create shipping label
    - If Owned
        - Add Number and Location
        - Route to Awaiting DD Stacks Search from bottom half of Route to Document Delivery button on request form
        - Process as document delivery request
            - LOANS
                - Use customized routing to skip Contact Customer queue
                - Use customized print template to identify items for shipping for loans
            - ARTICLE
                - Use default Doc Del workflow
    - Manually check out items on in local circulation system
- Document Delivery
    - Review requests for local ownership
    - If **not** owned
        - Route to **Borrowing**
        - Process as traditional ILL
        - When received, create alternate **Print Receives** document to identify as Distance Ed and create shipping label
    - If Owned
        - Add Number and Location
        - Process as Document Delivery request
            - LOANS
                - Use customized routing to skip Contact Customer queue
                - Use customized print template to identify items for shipping for loans
            - ARTICLE
                - Use default Doc Del workflow
    - Manually check out loans on in local circulation system

Routing Based on Web Form Submission

- Create status-specific web form for Distance Ed students
- Create routing based on workflow to Document Delivery as described above
    - Can route back to **Borrowing** if item is not owned

Custom Searching

Custom searches can be used to monitor usage of service. Using the **Document Delivery** process type and the **User Status** are helpful filters to create reports.