

# Implementing Document Delivery



## Agenda

- Workflow Review
- Customization Manager Settings
- Possible Customization Options
  - Web Pages
  - Routing
- Workflow/Implementation Discussion

## Workflow Review

### 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
- Request updated to **Awaiting Doc Del Customer Contact**
- Click **Contact Customers** from the Doc Del ribbon
  - **Email**
    - **Start Automatic Email** will deliver notices to patrons with email set as default
  - **Phone**
    - Contact patron by phone
    - Double click record to remove from list
  - **Print**

Workflow assumes that circulation tracking of item will occur in your local catalog check out system

- **Print Notifications** button to initiate print job

### **Non-Odyssey Delivery**

- Select **Notify Electronic Delivery** for electronic items delivered with alternate software (i.e. not Odyssey)
- Request updated as found and **Delivered to Web** status
- Patron notified
- For patron access via the ILLiad web pages
  - Save PDF format file to the PDF share (usually *x:\inetpub\wwwroot\illiad\pdf*) with a filename of *\*TransactionNumber.pdf*
- Recommended workflow:
  - Complete external scanning and posting functions prior to updating as delivered via Electronic Delivery as patron is notified immediately

### **Items Not Found**

- Click **Mark Item as Not Found** for items not found that *may be* obtainable through ILL Borrowing
  - Indicate the **Reasons for Not Found** on the drop down form
  - Updated to **Doc Del Item Not Found** status
  - Click the **Route to Borrowing** button on the Document Delivery Processing ribbon icon to route the request back to Borrowing **Awaiting Copyright Clearance** for Articles and **Awaiting Request** Processing for loans
  - Alternately, **Cancel Request** as in Borrowing

### **Cancel Request**

- Use **Cancel Request** as for Borrowing

### **Billing**

- Functions as other Billing modules in ILLiad
- Establish billing schedule in the Customization manager
- When enabled, the **Add Billing Charges** window will open when request is updated to one of the **Mark Found** options

### **Copyright**

- Functions as Copyright in Borrowing
- Initial processing in Borrowing module
- Will only report to CCC if order is submitted through **Submit Copyright Orders** form available from the Document Delivery ribbon
- Decision to submit copyright order is guided by local copyright policies

## Customization Manager Settings

### Email Settings

- Auto-generated emails have **two settings** in Customization Manager
  - **File Name**—points to .txt used to merge ILLiad data with text for email content
  - **Email Subject**—Content of subject line for email
- ILLDDArticleDelivery
  - Articles **Delivered via Mail**
- ILLDDArticleNotify
  - Articles **Delivered to Web**
- ILLDDLoanDeliveryNotify
  - Loans **Delivered via Mail**
- ILLDDLoanNotify
  - Loans **Delivered via Library Check-Out**
- Reasons for Not Found
  - Build and edit records in table following format of previously entered records

**Delivery option set  
in user record**

## Customization Options

### Delivery from Electronic Resources

- Module designed to deliver from print resources
- Options for electronic resources
  - Email routing include URL from found source
  - Save document to PDF share and use **Notify Electronic Delivery** option

### Special Population Services

*Scenario: Create Separate Web Form for Distance Ed Students to Submit Doc Del Requests*

- Create web form for Document Delivery items
- Restrict access to web form to Distance Education Status only
- Create Routing Rule to send requests from that form directly to Document Delivery
- Other Options
  - Modify routing rule so that only articles are routed from
  - Route all requests based on status to Doc Del or special queue in Borrowing
  - Workflow Implementation Discussion

## Implementing Document Delivery

### Discussion Questions

- As a hybrid of Borrowing and Lending operations, how might you work document delivery into your current workflow?
  - Task Considerations
    - Borrowing Searching

- Lending Stacks Searching
- What are advantages of introducing as advertised new service v. simply adding to regular services?
  - Discussion Questions
- Brainstorm possible email routing or routing rules that you might want to implement in your workflow

## Documentation and Helpful Links

### Atlas Documentation (ILLiad 8)

<https://prometheus.atlas-sys.com/display/illiad8>

#### General

→ ILLiad User Guide

→ Document Delivery

#### Customization

→ ILLiad Implementation Guide

→ System Routing (Routing Rules)

→ Customizing ILLiad

→ Customizing Emails

→ Customizing Webpages

#### IDS Workflow Toolkit

[http://toolkit.idsproject.org/doku.php?id=wiki:document\\_delivery](http://toolkit.idsproject.org/doku.php?id=wiki:document_delivery)

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