



ILLiad

International Conference

Not Just a Pretty Interface

Client Customizations for Efficient Workflows



Agenda

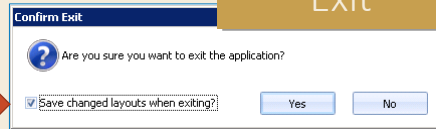
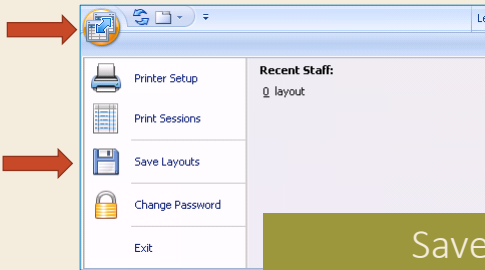
- Queues
- Grid Views
- Form Layouts
 - Request Forms
 - Client Processing Forms
- Sharing Layouts
 - Among Staff
 - With Other ILLiad Users

General Information

Customizations Applied to Staff User Account



Save Changes on Exit



Save On-the-Fly with Save Layouts Option

Not Just a Pretty Interface

QUEUES

Custom Queue Order

• Organize the list for **your processing priorities**
 • **Click and drag** queue to the place desired
 • Queue returns to that place in the list when new requests move to that status

B	D	L
17	0	14
0	0	4
190	49	31
6	0	0
2	0	0
215	49	49

Demo: Queue Order

B	D	L
17	0	14
0	0	4
190	49	31
6	0	0
2	0	0
215	49	49

Custom Queue Categories

• Organize processing queues vs. terminal or status queues

Queue Name	Count
Requests (1125 Items)	
Awaiting Lending Request Processing	559
Request Finished	25
Request Conditionalized	7
Odyssey Sending Failed	15
My Special Lending Friends	6
Item Shipped Internationally	99
Item Shipped	3
International Requests	123
In Stacks Searching	4
In Remote Storage Retrieval	1
HSL Shipping	1
Cancelled via Lending Web	1
Cancelled by ILL Staff	195
Awaiting Renewal	10
Awaiting Lending	31
Awaiting EJournal	4
Awaiting Conditional Request Processing	8
Awaiting Cancellation Review	10
Awaiting Article Exchange Notification	6
Aeon Request Sending Failed	4
OCLC Special Message: Complete?	4
Total	1125

Custom Queue Categories

• Organize processing queues vs. terminal or status queues
• Right click and select **add to new category**

Queue Name	Count
Requests (1125 Items)	
Awaiting Lending Request Processing	10
Request Finished	559
Request Conditionalized	25
Odyssey Sending Failed	7
My Special Lending Friends	15
Item Shipped Internationally	6
Item Shipped	99
International Requests	3
In Stacks Searching	123
In Remote Storage Retrieval	4
HSL Shipping	1
Cancelled via Lending Web	1
Cancelled by ILL Staff	195
Awaiting Renewal Request Processing	10
Awaiting Lending Scanning	31
Awaiting EJournal Processing	4
Awaiting Conditional Request Processing	8
Awaiting Cancellation Review	10
Awaiting Article Exchange Notification	6
Aeon Request Sending Failed	4
OCLC Special Message: Complete?	4
Total	1125

Enter the new category name:
Completed Requests
Create Cancel

Custom Queue Categories

• Organize processing queues vs. terminal or status queues

• Right click and select **add to new category**

• Add **category name** & click **Create**

Custom Queue Categories

• Organize processing queues vs. terminal or status queues

• Right click and select **add to new category**

• Add **category name**

• Click and drag **additional queues** into that category

• Open and close with **Plus/Minus** indicator

Custom Queue Categories

Awaiting Request Processing	45
Awaiting Return Label Printing	1
Awaiting RUSH ILL Processing	1
Awaiting Unfilled Processing	
Awaiting User Verification	
Blocked Returns	
British Library Example	
Cancelled by Customer	24
Cancelled by ILL Staff	277
Check Notes	1
Checked Out to Customer	13
Customer Not Notified	4
Customer Notified via E-Mail	
Customer Notified via Mail	
Customer Notified via Phone	
Delinquent Account	
Downtown Receives	
Ebook Review	
Faculty Requests	
In Electronic Delivery Processing	
In Purchase Review	
In Transit from Customer	
In Transit to Pickup Location	
New Distance Ed Requests	
No Renewal	
OCLC Special Message: Overdue	
OCLC Special Message: Received?	
Overdue-Faculty	
Problem Patron	
Recalled from Patron	
Received Partial/Incorrect Item	
Recent Date - Evaluate for Purchase	1
Request Finished	516
Request in Processing	2
Request Sent	25

From this

- Can click and drag to organize like individual queues
- Display only when requests are in a queue in the group

Requests (145 items)	
Awaiting Request Processing	45
Awaiting Copyright Clearance	7
Awaiting RUSH ILL Processing	1
Awaiting Unfilled Processing	87
Awaiting User Verification	1
Faculty Requests	1
New Distance Ed Requests	3
Problem Requests (54 items)	
Purchase on Demand (4 items)	
Status Queues (119 items)	
Completed Requests (817 items)	
Custom Queues (20 items)	
Renewals (5 items)	

To this

Ideas for Use

Closed Requests

In Process/Status Queues

Individual Staff Queues

Overdue Items

Special Messages

Problem Requests

Hide Queues

Main
 Borrowing | Document Delivery | Lending

Requests (145 items)

- Awaiting Request Processing 45
- Awaiting Copyright Clearance
- Awaiting RUSH ILL Processing
- Awaiting Unfilled Processing
- Awaiting User Verification
- Faculty Requests 1
- New Distance Ed Requests 3
- Problem Requests (54 items)
- Purchase on Demand (4 items)
- Status Queues (119 items)
- Completed Requests (817 items)
 - Request Finis 516
 - Cancelled by 24
 - Cancelled by 277
- Custom Queues (5 items)
- Renewals (5 items)

Context Menu for Request Finis:

- Reset To Default View
- Add to New Category
- Hide this Queue

- Hide queue from display
- Right click and select **Hide this Queue**

Caveats



Be sure to check for suppressed queues that need to be monitored

Categories dynamic like queues

Completed Requests (817 items)

- Request Finis
- Cancelled by
- Cancelled by
- Custom Queues (5 items)
- Renewals (5 items)

Context Menu for Request Finis:

- Reset To Default View
- Add to New Category
- Hide this Queue

Only one BIG undo

Not Just a Pretty Interface

GRID VIEWS

Change Display

Similar to Spreadsheet Functionality

Transaction Number	Username	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	
2351	Lending	Loan	Hannigan, ...	Ida B : --an...	New York : ...			1st ed.	Ida B : --an...									
2352	Lending	Loan	Lobel, Arnold.	Fables /	[New York] ...			1st ed.	Fables /									
2353	Lending	Loan	Cussler, Clive.	Sahara : a ...	Boston, Ma...			Large print ...	Sahara : a ...									
2355	Lending	Article	Greig, Dela...	Developme...	1991-1998:...		2006		Developme...	16	5		2006	465-475			Greig, Dela... Shea butter...	
2356	Lending	Article	Deegan, F M	Contributio...	[Heidelberg...		2011		Contributio...	162	3		2011	651-669			Deegan, F M Magma mixi...	
2361	Lending	Article	King, Jason B.	Journal of V...														King, Jason B. Paintball in...
2362	Lending	Loan	Robison, Jo...	Look me in t...														Robison, Jo...
2363	Lending	Loan	Tyler, Stev...	Does the n...														Tyler, Stev...
2364	Lending	Loan		The monast...														
2380	Lending	Loan	Youmans; Y...	Youmans co...														Youmans; Y...

- Customize by **Queue/Status**
 - i.e. Customizations only apply to that particular queue when opened
- Customizations Apply to **Staff User**

Resize Columns

AWAITING LENDING REQUEST PROCESSING - ILLIAD CLIENT

Transaction Number	Username	Request T...	Loan Author	Loan Title	Loan Publi...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...
2351	Lending	Loan	Hannigan, ...	Ida B : --an...	New York : ...			1st ed.	Ida B : --an...									Hannigan, ...
2352	Lending	Loan	Lobel, Arnold.	Fables /	[New York] ...			1st ed.	Fables /									Lobel, Arnold.
2353	Lending	Loan	Cussler, Clive.	Sahara : a ...	Boston, Ma...			Large print ...	Sahara : a ...									Cussler, Clive.
2355	Lending	Article	Greig, Dela...	Developme...	1991-1998:...		2006	Developme...	16	5		2006	465-475	Greig, Dela...	Shea butter...			
2356	Lending	Article	Deegan, F M	Contributio...	[Heidelberg...		2011	Contributio...	162	3		2011	651-669	Deegan, F M	Magma mixi...			
2361	Lending	Article	King, Jason B.	Journal of v...	[Oxford] : ...		2007	Journal of v...	17	3		2007	290-293	King, Jason B.	Paintball in...			
2362	Lending	Loan	Robison, Jo...	Look me in t...	New York : ...			Look me in t...						Robison, Jo...				
2363	Lending	Loan	Tyler, Stev...	Does the n...	New York : ...			Does the n...						Tyler, Stev...				
2364	Lending	Loan		The monast...	London : BB...			The monast...										
2380	Lending	Loan	Youmans; Y...	Youmans ce...	New York : ...			Youmans ce...						Youmans; Y...				

Resize Columns

AWAITING LENDING REQUEST PROCESSING - ILLIAD CLIENT

Transaction Number	Username	Request T...	Loan Author	Loan Title	Loan Publi...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	
2351	Lending	Loan	Hannigan, ...	Ida B : --and her plans to maximize fun, avoid disas...	New York : ...			1st ed.											
2352	Lending	Loan	Lobel, Arnold.	Fables /	[New York] ...			1st ed.											
2353	Lending	Loan	Cussler, Clive.	Sahara : a novel /	Boston, Ma...			Large print ...											
2355	Lending	Article	Greig, Dela...	Development in practice Shea butter: connecting ru...	1991-1998:...		2006												
2356	Lending	Article	Deegan, F M	Contributions to mineralogy and petrology Magma ...	[Heidelberg...		2011												
2361	Lending	Article	King, Jason B.	Journal of veterinary emergency and critical care: P...	[Oxford] : ...		2007												
2362	Lending	Loan	Robison, Jo...	Look me in the eye : my life with Asperger's /	New York : ...														
2363	Lending	Loan	Tyler, Stev...	Does the noise in my head bother you? : a rock 'n' r...	New York : ...														
2364	Lending	Loan		The monastery	London : BB...														
2380	Lending	Loan	Youmans; Y...	Youmans celebrated hats style and quality unequal...	New York : ...														

Cannot Resize Rows

Remove Columns

Right-click on column header

Transaction Number	Username	Request Title	Loan Author	Loan Title	Loan Place	Loan Date	Loan Edition
2351	Lending	Loan	Hannigan, ...	Ida B : --and her plans to maximize fu...			1st ed.
2352	Lending	Loan	Lobel, Arnold.	Fables /			1st ed.
2353	Lending	Loan	Cussler, Clive.	Sahara : a novel /			Large print ...
2355	Lending	Article	Greig, Dela...	Development in practice Shea butter: ...		2006	
2356	Lending	Article	Deegan, F M	Contributions to mineralogy and petrol...		2011	
2361	Lending	Article	King, Jason B.	Journal of veterinary emergency and ...		2007	
2362	Lending	Loan	Robison, Jo...	Look me in the eye : my life with Asper...			
2363	Lending	Loan	Tyler, Stev...	Does the noise in my head bother you...			
2364	Lending	Loan		The monastery			
2380	Lending	Loan	Youmans; Y...	Youmans celebrated hats style and qu...			

Remove Columns

Transactio...	Username	Request T...	Loan Author	Loan Title	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jc
2351	Lending	Loan	Hannigan, ...	Ida B : --and her plans to maximize fu...			1st ed.	Ida B : --an...		
2352	Lending	Loan	Lobel, Arnold.	Fables /			1st ed.	Fables /		
2353	Lending	Loan	Cussler, Clive.	Sahara : a novel /			Large print ...	Sahara : a a...		
2355	Lending	Article	Greig, Dela...	Development in practice Shea butter: ...		2006		Developme...	16	5
2356	Lending	Article	Deegan, F M	Contributions to mineralogy and petrol...		2011		Contributio...	162	3
2361	Lending	Article	King, Jason B.	Journal of veterinary emergency and ...		2007		Journal of v...	17	3
2362	Lending	Loan	Robison, Jo...	Look me in the eye : my life with Asper...				Look me in t...		
2363	Lending	Loan	Tyler, Stev...	Does the noise in my head bother you...				Does the n...		
2364	Lending	Loan		The monastery				The monast...		
2380	Lending	Loan	Youmans; Y...	Youmans celebrated hats style and qu...				Youmans ce...		

Restore Columns

Drag a column header here to group by that column

Transac...	Lending Library	Rush	Not Wante...	Request T...	Maxcost	System ID	Loan Sub	Loan Author	Loan Title
2351 TRNAA	Regular	No	02/06/2015	Loan	0	OCLC		Hannigan, Ka...	Ida B : --and her plans to maximize f
2352 TRNAA	Regular	No	02/06/2015	Loan	0	OCLC		Lobel, Arnold.	Fables /
2353 TRNAA	Regular	No	02/06/2015	Loan	6.99	OCLC		Cussler, Clive.	Sahara : a novel /
2355 TRNAA	No	No	09/21/2015	Article		OCLC	2006	Greig, Delaney	Development in practice Shea butter
2356 TRNAA	No	No	09/21/2015	Article		OCLC	2011	Deegan, F M	Contributions to mineralogy and pet
2361 COO	Regular	No	03/11/2015	Article	\$50.00IFM	OCLC	2007	King, Jason B.	Journal of veterinary emergency an
2362 COO	No	No	03/11/2015	Loan	\$50.00IFM	OCLC		Robison, Joh...	Look me in the eye : my life with Asp
2363 COO	No	No	03/11/2015	Loan	\$50.00IFM	OCLC		Tyler, Steve...	Does the noise in my head bother yo
2364 COO	Regular	No	03/11/2015	Loan	\$50.00IFM	OCLC			The monastery
2380 TRNAA	No	No	04/02/2015	Loan	35.00IFM	OCLC		Youmans; Yo...	Youmans celebrated hats style and c

- Right-Click column header
- Select **Column Chooser**
- Click and drag column to back to desired location

Move Columns

Drag a column header here to group by that column

ie	Pages	Due Date	Renewals ...	Spec Ins	Pieces	Library Us...	Allow Phot...	Lending Lib...	Season Fo...
		3/20/2015	Yes			No	Yes	TRNAA	
		3/19/2015	Yes			No	Yes	TRNAA	
		3/25/2015	Yes			No	Yes	TRNAA	
		3/20/2015	Yes			No	Yes	TRNAA	

- Use slider to locate desired field
- Click and drag column to desired location

Move Columns

Drag a column header here to group by that column

ie	Pages	Due Date	Renewals ...	Spec Ins	Pieces	Library Us...	Allow Phot...	Lending Lib...	Reason Fo...
		3/20/2015	Yes			No	Yes	TRNAA	
		3/19/2015						TRNAA	

Drag a column header here to group by that column

Transactio...	Lending Library	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date
2351	TRNAA	Loan	Hannigan, Ka...	Ida B : --and her plans to maximize fun, avoid di...	New York : ...		
2352	TRNAA	Loan	Lobel, Arnold.	Fables /	[New York] ...		
2353	TRNAA	Loan	Cussler, Clive.	Sahara : a novel /	Boston, Ma...		
2355	TRNAA	Article	Greig, Delaney	Development in practice Shea butter: connecting...	1991-1998:...		2006
2356	TRNAA	Article	Deegan, F M	Contributions to mineralogy and petrology Magm...	[Heidelberg...		2011
2361	COD	Article	King, Jason B.	Journal of veterinary emergency and critical car...	[Oxford] : ...		2007
2362	COD	Loan	Robison, J...	Look me in the eye : my life with Asperger's /	New York :		
2363	COD	Loan	Tyler, Ste...				
2364	COD	Loan					
2380	TRNAA	Loan	Youmans;				

- Use slider to locate desired field
- Click and drag column to desired location

Example

Home Borrowing Document Delivery Lending System

Process

Open View Cancel Route Add Flag Send E-mail Export Print

Process

Drag a column header here to group by that column

Transac...	Lending Library	Rush	Not Wante...	Request T...	Maxcost	System ID	Loan Date	Loan Title	Photo Jour...	Photo Journal Title	Photo Jour...	Photo Jour...
2351	TRNAA	Regular	02/06/2015	Loan	0	OCLC		Ida B : --and her plans to maximize fun, avoid di...		Ida B : --and her pl...		
2352	TRNAA	No	02/06/2015	Loan	0	OCLC		Fables /		Fables /		
2353	TRNAA	Regular	02/06/2015	Loan	6.99	OCLC		Sahara : a novel /		Sahara : a novel /		
2355	TRNAA	No	09/14/2016	Article		OCLC	2006	Development in practice Shea butter: connecting...	2006	Development in pra...	16	5
2356	TRNAA	No	09/21/2015	Article		OCLC	2011	Contributions to mineralogy and petrology Magm...	2011	Contributions to mi...	162	3
2361	COD	Regular	03/11/2015	Article	\$50.00IFM	OCLC	2007	Journal of veterinary emergency and critical car...	2007	Journal of veterinar...	17	3
2362	COD	No	03/11/2015	Loan	\$50.00IFM	OCLC		Look me in the eye : my life with Asperger's /		Look me in the eye ...		
2363	COD	No	03/11/2015	Loan	\$50.00IFM	OCLC		Does the noise in my head bother you? : a rock'...		Does the noise in m...		
2364	COD	Regular	03/11/2015	Loan	\$50.00IFM	OCLC		The monastery		The monastery		
2380	TRNAA	No	04/02/2015	Loan	35.00IFM	OCLC		Youmans celebrated hats style and quality uneq...		Youmans celebrate...		

Sort Columns

Drag a column header here to group by that column

Transac...	Lending Library	Rush	Not Wante...	Request Type	Maxcost
2351	TRNAA	Regular	02/06/2015	Loan	0
2352	TRNAA	No	02/06/2015	Loan	0
2353	TRNAA	Regular	02/06/2015	Loan	6.99
2355	TRNAA	No	09/14/2016	Article	
2356	TRNAA	No	09/21/2015	Article	
2361	COD	Regular	03/11/2015	Loan	\$50.00IFM
2362	COD	No	03/11/2015	Loan	\$50.00IFM
2363	COD	No	03/11/2015	Loan	\$50.00IFM
2364	COD	Regular	03/11/2015	Loan	\$50.00IFM
2380	TRNAA	No	04/02/2015	Loan	\$5.00IFM

layout: 10 requests

- Default sort by **Transaction Number** (ascending)
- Click column header to sort by that column

Group Columns

Drag a column header here to group by that column

Transac...	Lending Library	Rush	Not Wante...	Request Type	Maxcost	System ID
2355	TRNAA	No	09/14/2016	Article		
2356	TRNAA	No	09/21/2015	Article		
2361	COD	Regular	03/11/2015	Loan	\$50.00IFM	
2351	TRNAA	Regular	02/06/2015	Loan	6.99	OCLC
2352	TRNAA	No	02/06/2015	Loan	0	OCLC
2353	TRNAA	Regular	02/06/2015	Loan	6.99	OCLC
2362	COD	No	03/11/2015	Loan	\$50.00IFM	OCLC
2363	COD	No	03/11/2015	Loan	\$50.00IFM	OCLC
2364	COD	Regular	03/11/2015	Loan	\$50.00IFM	OCLC
2380	TRNAA	No	04/02/2015	Loan	\$5.00IFM	OCLC

Request Type: Loan

2380	TRNAA	No	04/02/2015	\$5.00IFM	OCLC
2364	COD	Regular	03/11/2015	\$50.00IFM	OCLC
2363	COD	No	03/11/2015	\$50.00IFM	OCLC
2362	COD	No	03/11/2015	\$50.00IFM	OCLC
2353	TRNAA	Regular	02/06/2015	6.99	OCLC
2352	TRNAA	No	02/06/2015	0	OCLC
2351	TRNAA	Regular	02/06/2015	0	OCLC

Request Type: Article

- Click & drag **column header** into space above grid
- Requests groups by **field value**
- Open and close with +/-

Remember

**DON'T
FORGET**

- Customize by **Queue/Status**
 - i.e. Customizations only apply to that particular queue when opened
- Customizations Apply to **Staff User**

Not Just a Pretty Interface

FORM LAYOUTS

Request Forms

Default Doesn't Have to Be the Default

The screenshot shows the Aeon system interface for a request form. The navigation bar at the top includes tabs for 'Detail', 'History', 'OCLC', 'Z39.50', and 'PubMed/Docline'. The 'Detail' tab is currently selected. The form displays various fields for 'General Request Information', 'Article Info', 'Loan Info', and 'Item Information'. A blue callout box is overlaid on the 'Detail' tab, indicating that it is not necessarily the default tab.

Re-Order Tabs

Re-Order Tabs

The left screenshot shows the 'Detail' tab selected in the navigation bar. The right screenshot shows the 'OCLC' tab selected. A yellow callout box with a warning sign provides instructions on how to re-order tabs:

- Click and drag tabs to move to new order on a form
- Be careful not to "pop-out" the window

Add & Remove Fields

The screenshot shows the Aeon Lending Request form for transaction 2380. A right-click context menu is open over the 'Loan' field, with a red arrow pointing to the 'Customize Layout' option. The menu also includes 'Restore Default Layout'.

General Request Information	
Transaction Number	2380
Username	Lending
Transaction Date	3/3/2015 11:08 AM
Delivery Method	Not wanted Article
Service Level	Regular
Billing Account	

Article Info	
Title	Youmans celebrated hats style and quality unequalled.
Author	Youmans; Youmans, Vincent
Publisher	New York : Youmans, 1899
Place	

- Right-click between fields on a form

Add & Remove Fields

The screenshot shows the Aeon Lending Request form with the 'Customization' window open. The window lists various fields that can be added to or removed from the form layout. A red arrow points to the 'Customize Layout' option in the context menu, and another red arrow points to the 'Customization' window.

General Request Information	
Transaction Number	2380
Username	Lending
Transaction Date	3/3/2015 11:08 AM
Delivery Method	Not wanted Article
Service Level	Regular
Billing Account	

OCLC Information	
ILL Number	144057177
OCLC Number	234310104
Lending String	*TRNAB,TRNAB
Borrower	TRNAA
System ID	OCLC

Customization	
Label	
Separator	
Splitter	
Aeon Requests	
Article Exchange Password (Article Exchange)	
Article Exchange URL (Article Exchange)	
DOI (DOI)	
In Process Date (In Process Date)	
Item Info 1 (Item Info 1)	
Item Info 2 (Item Info 2)	

- Right-click between fields on a form
- Select **Customize Layout** to open **Customization Window**

Add & Remove Fields

• Right-click between fields on a form
 • Select **Customize Layout** to open **Customization Window**
 • Click & drag fields to or from customization window to **remove or add**

Add & Remove Fields

• Right-click between fields on a form
 • Select **Customize Layout** to open **Customization Window**
 • Click & drag fields to or from customization window to **remove or add**

Re-Arrange Fields

The screenshot shows the Aeon Lending Request software interface. The main window displays a "Lending Request" form for transaction number 2380. A "Customization" window is open on the left, showing a list of fields that can be rearranged. A red arrow points from the "Borrower" field in the customization window to the "Borrower" field in the main form. A red box highlights the "Borrower" field in the main form. A callout box contains the following text:

- Click & drag fields to rearrange on the form from the Customization view

Re-Arrange Fields

The screenshot shows the Aeon Lending Request software interface. The main window displays a "Lending Request" form for transaction number 2380. A "Customization" window is open on the left, showing a list of fields that can be rearranged. A red box highlights the "Borrower" field in the main form. A callout box contains the following text:

- Click & drag fields to rearrange on the form from the Customization view

Fields from Tabs

2380 - Lending Request

Cancel Request Conditionalize Request Finished Searching Mark Found Mark Found Scan Now Yes Yes With Due Date No Renewals Route Add Flag Remove Flag Routing Policies Directory OCLC Resend Request Odyssey Billing View

Detail History OCLC Z39.50 PubMed/Docline

General Request Information

Transaction Number	2380	Article	Loan
Username	Lending	Borrower	TRNAA 1
Transaction Date	3/3/2015 11:08 AM	Not Wanted After	04/02/2015
Delivery Method	Regular	Site	COKAMO
Billing Account		Shipping Options	Doc Type

Library Name Atlas Systems, Inc.

Library Name Atlas Systems, Inc.

• Fields from tabs can be moved to initial screen

Fields from Tabs

2380 - Lending Request

Cancel Request Conditionalize Request Finished Searching Mark Found Mark Found Scan Now Yes Yes With Due Date No Renewals Route Add Flag Remove Flag Routing Policies Directory OCLC Resend Request Odyssey Billing View

Detail History OCLC Z39.50 PubMed/Docline

General Request Information

Transaction Number	2380	Article	Loan
Username	Lending	Borrower	TRNAA 1
Transaction Date	3/3/2015 11:08 AM	Not Wanted After	04/02/2015
Delivery Method	Regular	Site	COKAMO
Billing Account		Shipping Options	Doc Type

Library Name Atlas Systems, Inc.

Library Name Atlas Systems, Inc.

• Fields from tabs can be moved to initial screen

Additional Field Customizations

Select the field and right-click to access field customization menu

- Hide Customization Form
- Rename
- Hide Text
- Text Position
- Hide Item
- Group
- Create EmptySpace Item
- Size Constraints
- Restore Default Layout
- Restore Item Text

Groups and Tabs

Select the group title to select

Right-click to access field customization menu

- Hide Customization Form
- Rename
- Hide Text
- Text Position
- Ungroup
- Create EmptySpace Item
- Create Tabbed Group
- Restore Default Layout

Groups and Tabs

System 2017 - Borrowing Request

Borrowing Processing Printing Copyright OCLC

Cancel Request Sent Route Route To Document Add Flag Remove Flag Clone to Current User Clone to Another User Policies Directory Billing View Send E-Mail Pending Updates Import into Resubmission

Next Step Routing Cloning User System

Detail History OCLC #239.50 PubMed/Doctype

Not customizable

General Request Information

Transaction Number	2017	Article	Loan
Name	Randall Reader	Site	
Not Wanted After	02/05/2015	Doc Type	DVD
Status	Undergraduate	Shipping Options	
Delivery Method	Hold for Pickup	Transaction Date	3/5/2015 1:25 PM
Service Level	Regular	Wanted By	

OCLC Information

ILL Number	
OCLC Number	
Lending String	
System ID	OCLC
Lender	
OCLC Status	

Article Info Loan Info Collections Additional

Customizable

Journal Title	
Volume/Issue	
Month/Year/Pages	
Article Author	
Article Title	
Original Journal Title	
Item Author/Publisher	
Item Place/Edition	

Accept Alternate Edition
 Accept Non English
 Allow Copies?
 Copyright Already Paid?
 Allow Renewals?
 Library Use Only?
 Replacement Pages?
 Priority Shipping
 Purchase Price
 Item Info 2

Undo

CTL+Z does not work but . . .

Customization

Hidden Items Layout Tree View


- Empty Space Item
- Label
- Separator
- Splitter
- Open Requests
- DOI (DOI)
- In Process Date (In Process Date)
- Item Info 1 (Item Info 1)

HOORAY!

Helpful Hints: Field Labels

OCLC Information	
ILL Number	144057177
OCLC Number	234310104
Lending String	*TRNAB,TRNAB
System ID	OCLC 0
OCLC Status	CONSIDERING

Field label width NOT customizable



Helpful Hints: Watch for Insert Types

General Request Information													
Year	2017												
Reader	Randall Reader												
Request Type	<input type="radio"/> Article <input checked="" type="radio"/> Loan												
Date	02/05/2015												
Status	Undergraduate												
Delivery Method	Hold for Pickup												
Service Level	Regular												
Billing Account													
Transaction Date	3/4/2015 5:00 PM												
Wanted By													
Shipping Options													
Doc Type	DVD												
System ID	OCLC												
Lender													
OCLC Status													
Article Info	<table border="1"> <tr> <td>Organization</td> <td>5765 Robin Hood Way Wintermass, CO 80456</td> </tr> <tr> <td>Address</td> <td></td> </tr> <tr> <td>Site</td> <td></td> </tr> </table>	Organization	5765 Robin Hood Way Wintermass, CO 80456	Address		Site							
Organization	5765 Robin Hood Way Wintermass, CO 80456												
Address													
Site													
Loan Info	<table border="1"> <tr> <td>Department</td> <td></td> </tr> <tr> <td>Delivery Location</td> <td></td> </tr> <tr> <td>Notification</td> <td>E-Mail</td> </tr> <tr> <td>Article Delivery</td> <td>Hold for Pickup</td> </tr> <tr> <td>Electronic Delivery</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Hold for Pickup</td> <td></td> </tr> </table>	Department		Delivery Location		Notification	E-Mail	Article Delivery	Hold for Pickup	Electronic Delivery	<input checked="" type="checkbox"/>	Hold for Pickup	
Department													
Delivery Location													
Notification	E-Mail												
Article Delivery	Hold for Pickup												
Electronic Delivery	<input checked="" type="checkbox"/>												
Hold for Pickup													
Local Holdings													
Imported													
Accept Alternate Edition	<input checked="" type="checkbox"/>												
Accept Non English	<input checked="" type="checkbox"/>												
Allow Copies?	<input type="checkbox"/>												
Copyright Already Paid?	<input type="checkbox"/>												
Allow Renewals?	<input type="checkbox"/>												
Library Use Only?	<input type="checkbox"/>												
Replacement Pages?	<input type="checkbox"/>												
Priority Shipping	<input type="checkbox"/>												
Purchase Price													
Item Info 2													
Date	Note												
Type	Added By												

Splits existing field into two

Fills across line as indicated

Adds new field between the two

Slowly move box over area to activate different types of inserts

Helpful Hints—Resizing Fields

Adjacent Fields also need to be set to Free Sizing

Right-click

- Hide Customization Form
- Hide Text
- Text Position
- Hide Item
- Group
- Create EmptySpace Item
- Size Constraints
 - Reset to default
 - Free sizing
 - Lock Size
 - Lock Width
 - Lock Height
- Restore Default Layout
- Restore Item Text

Helpful Hints—Fixing Odd Spacing

Right-click

Customization

- Hidden Items
- Empty Space
- Label
- Separator
- Splitter
- Aeon Requests
- Ariel (Ariel)
- Article Exchange Password (Artic...
- Article Exchange URL (Article Exc...
- DOI (DOI)
- In Process Date (In Process Date)
- Item Info 1 (Item Info 1)

- Hide Customization Form
- Hide Text
- Text Position
- Hide Item
- Group
- Create EmptySpace Item
- Size Constraints
 - Reset to default
 - Free sizing
 - Lock Size
 - Lock Width
 - Lock Height
- Restore Default Layout
- Restore Item Text

Helpful Hints—Ungroup

Ungroup option allows the more flexibility with sizing

The screenshot shows a window titled 'Detail' with tabs for 'History', 'OCLC', 'Z39.50', and 'PubMed/Docline'. The 'General Request Information' section is visible, with fields for Transaction Number (2017), Name (Randall Reader), Not Wanted After (02/05/2015), Status (Undergraduate), Delivery Method (Hold for Pickup), and Service Level (Regular). A context menu is open over the 'Ungroup' option, listing actions such as 'Hide Customization Form', 'Rename', 'Hide Text', 'Text Position', 'Ungroup', 'Create EmptySpace Item', 'Create Tabbed Group', and 'Restore Default Layout'.

Borrowing Request Example

Fields removed

- Ariel
- Billing Account
- Citation Information Title
- Citation Information Date
- Citation Information Pages
- Priority Shipping
- Replacement Pages
- Received Via

The screenshot shows a window titled '80 - Borrowing Request' with a toolbar containing various actions like 'Cancel Request', 'Request Sent', 'Route', 'Route To Document', 'Add Flag', 'Remove Flag', 'Clone to Current User', 'Clone to Another User', 'Policies Directory', 'Billing', 'View', 'Send E-Mail', 'Pending Updates', and 'Import into Resubmission System'. The 'Transaction Information' section includes fields for Transaction Date (3/13/2015 8:48 AM), Transaction Number (80), Name (Arbe Article), Status (Graduate), Doc Type (Article), Delivery Method (Hold for Pickup), and Site (firstsearch.oclc.org:ArticleFirst). The 'Item Information' section includes fields for Call Number, Location, Due Date (11/10/2011), Reason For Cancellation (Exceeds max cost), Item Num/Ref Num, ISxN (0028-646X), and Max Cost/Pieces (1). A table at the bottom shows a history of updates:

Date	Note	Type	Added By
10/17/2011 12:39 AM	Not found as cited	System	System
10/12/2011 12:08 AM	TRNAA: Not found as cited	System	System
10/11/2011 11:56 AM	TRNAA: Not found as cited	System	System
10/11/2011 9:15 AM	This is a test account. Please do not fill. Thank you!	Lender	System
6/3/2011 2:07 PM	We charge \$10 for first 10 pages, \$0.10 for each additional page.	Staff	hblack

The status at the bottom is 'Awaiting Request Processing'.

Lending Request Example

Fields removed

- Ariel
- Billing Account
- Odyssey
- Citation Information Title
- Citation Information Date
- Citation Information Pages
- Priority Shipping
- Replacement Pages
- Received Via
- Wanted by
- Username

Transaction Information

Transaction Number: 2380
 Borrower: TRNAA
 Library Name: Atlas Systems, Inc.
 Transaction Date: 3/13/2015 9:04 AM
 Delivery Method: Site
 Service Level: Regular

Article Info

Journal Title: Youmans celebrated hats style and quality unequalled.
 Article Author: Youmans; Youmans, Vincent
 Item Author/Publisher: New York : Youmans, 1899

Item Information

Call Number: [Empty]
 Location: [Empty]
 Due Date: 4/1/2015
 Reason For Cancellation: [Empty]
 Item Num: [Empty]
 Ref Number: [Empty]
 ISBN: [Empty]
 Pieces: [Empty]

Special Instructions

Date	Note	Type	Added By
3/3/2015 11:08 AM	Billing Notes: THIS IS A TEST ACCOUNT! PLEASE DO NOT FILL	System	System
3/3/2015 11:08 AM	Borrowing Notes: This is a test account. Please do NOT fill. Thank you!	System	System

Awaiting Lending Request Processing

Client Processing Forms

Same functionality as Forms

Check In From Lending Library

Transaction Number: [Empty]
 ILL Number: [Empty]
 Citation Information: [Empty]

Check In

Transaction Number: [Empty]
 ILL Number: [Empty]
 Customer Name: [Empty]
 OCLC Status: [Empty]
 Delivery Location: [Empty]
 Electronic Delivery?: [Empty]
 Accept Non English?: [Empty]
 Accept Alternate Edition?: [Empty]

Customization

Hidden Items: [Empty]
 Layout: Tree View
 Empty Space Item
 Label
 Separator
 Splitter

Document Type: [Empty]
 Number of Pieces: 1
 Number of Pages: [Empty]

Customize the Barometer

Click & drag additional reports to barometer section

The screenshot shows the ILLiad Client interface with the following components:

- Navigation Menu:** Home, Borrowing, Document Delivery, Lending, System.
- User Information:** Username, Symbol, Name, ID, Address.
- Main Panel:**
 - Requests (371 Items):** A list of request types and their counts, including:

Request Type	Count
Awaiting Lending Request Processing	10
Aeon Request Sending Failed	4
Awaiting Article Exchange Notification	6
Awaiting Cancellation Review	10
Awaiting Conditional Request Processing	8
Awaiting EJournal Processing	4
Awaiting Lending Scanning	31
Awaiting Renewal Request Processing	10
Cancelled via Lending Web	1
HSL Shipping	4
In Remote Storage Retrieval	1
In Stacks Searching	123
International Requests	3
Item Shipped	99
Item Shipped Internationally	6
My Special Lending Friends	15
 - Barometer:** Two line graphs showing 'Borrowing Requests Received By Day' and 'Lending Received By Day' from 3/7/2015 to 3/13/2015.
 - System Alerts:** A table of system alerts:

Alert	B	D	L
Connection Manager	17	0	14
Odyssey Manager	0	0	4
Outgoing E-Mail	190	49	38
System Error Flags	6	0	0
Users To Clear	2	0	0
Total	215	49	56

Not Just Pretty Interface

MODIFYING AND HIDING FIELD LABELS

Staff Manager

ILliad Staff Manager 8.4.0.0

Staff Field Customizations

Save Cancel Remove Copy Field Customizations

Editing Options

Users Field Customizations

Username	Field Name	Display Name	Hidden
Click here to add a new row			
MBBurke	SSN	User ID	

bbblack | IU | Deleted 0 layout/print settings for MBBurke

Add a record for each staff member for each field in Field Customizations Tab

Add Field Label Change Record

ILliad Staff Manager

Staff Field Customizations

Save Cancel Remove Copy Field Customizations

Editing Options

Users Field Customizations

Click into to blank field to add a record

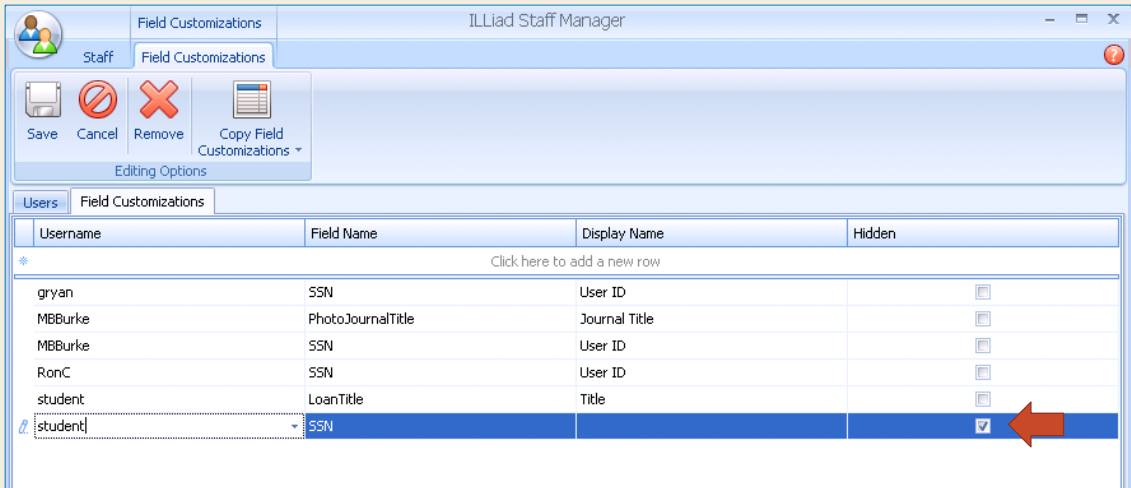
Select Username from dropdown

Cannot Change while User is Signed In

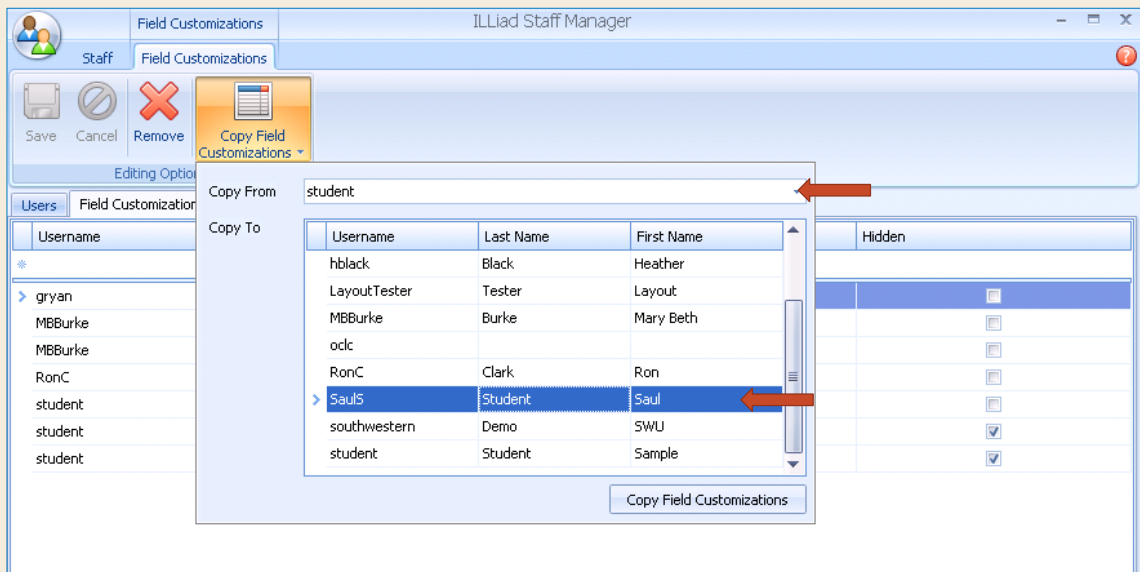
Add Field Name (default) & Display Name

Username	Field Name	Display Name	Hidden
gryan	SSN		
MBBurke	PhotoJournalTitle		
MBBurke	SSN		
BonC	PhotoJournalTitle		
student	SSN	User ID	
student	PhotoJournalTitle		
student	SSN		
student	PhotoJournalTitle		
student	SSN	User ID	

Add Hidden Field Record



Copy to New User



Three Views

The image displays three overlapping screenshots of a library system interface, illustrating different views of user data. Each screenshot shows a 'Users To Clear' window with a table of user information and a 'User Information' form below it.

Default View: The 'SSN' column in the table is highlighted with a red box. The 'User Information' form shows fields for Username, Last Name, First Name, ID, and Status.

Hidden Field View: An arrow points to the 'SSN' column in the table, which is now hidden. The 'User Information' form shows fields for Username, Last Name, First Name, ID, and Status, but the 'SSN' field is not visible.

Modified Field View: The 'User ID' column in the table is highlighted with a red box. The 'User Information' form shows fields for Username, Last Name, First Name, ID, and Status, with the 'User ID' field highlighted.

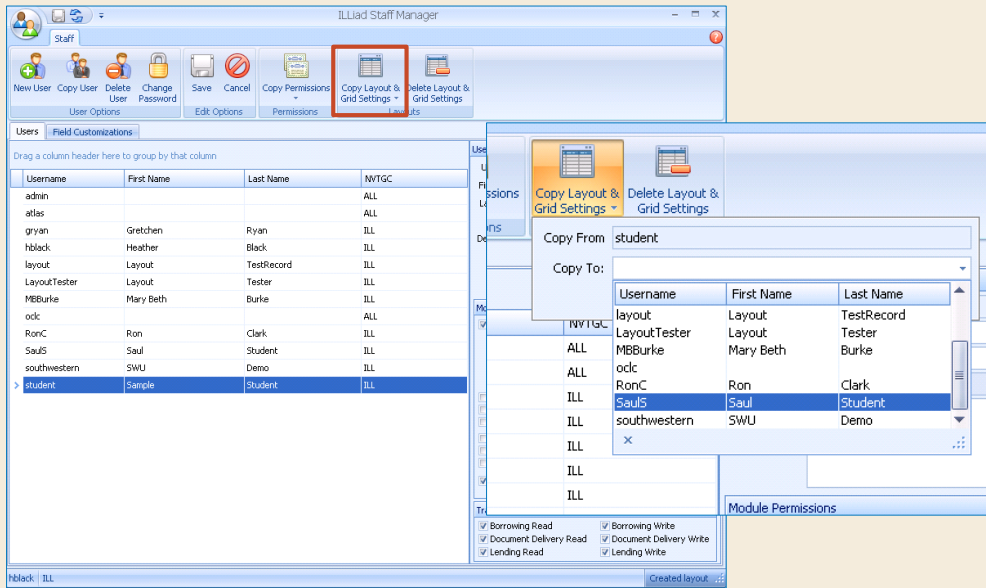
User Name	Last Name	First Name	SSN	Status
GHall	Hall	Gibby	012345	Faculty
sspires	Spires	Stephanie		Staff

User Name	Last Name	First Name	User ID	Status
GHall	Hall	Gibby	012345	Faculty
sspires	Spires	Stephanie		Staff

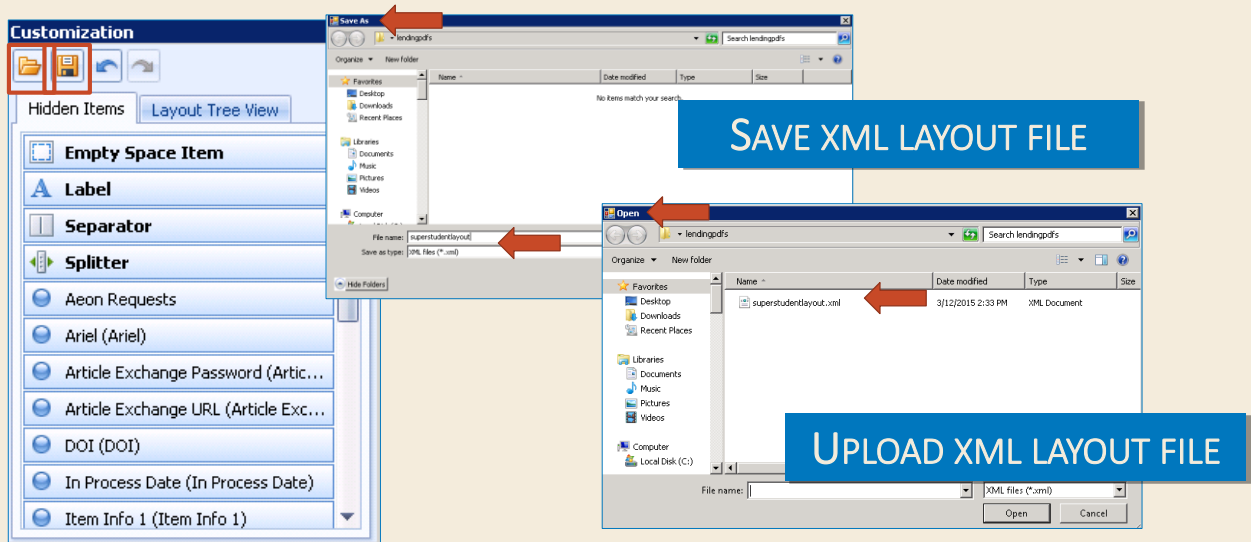
Not Just Pretty Interface

SHARING YOUR WORK

Sharing Layouts among Staff



Sharing Layouts with Other ILLiad Users





ILLiad

International Conference

THANK YOU!