



# ILLiad

International Conference

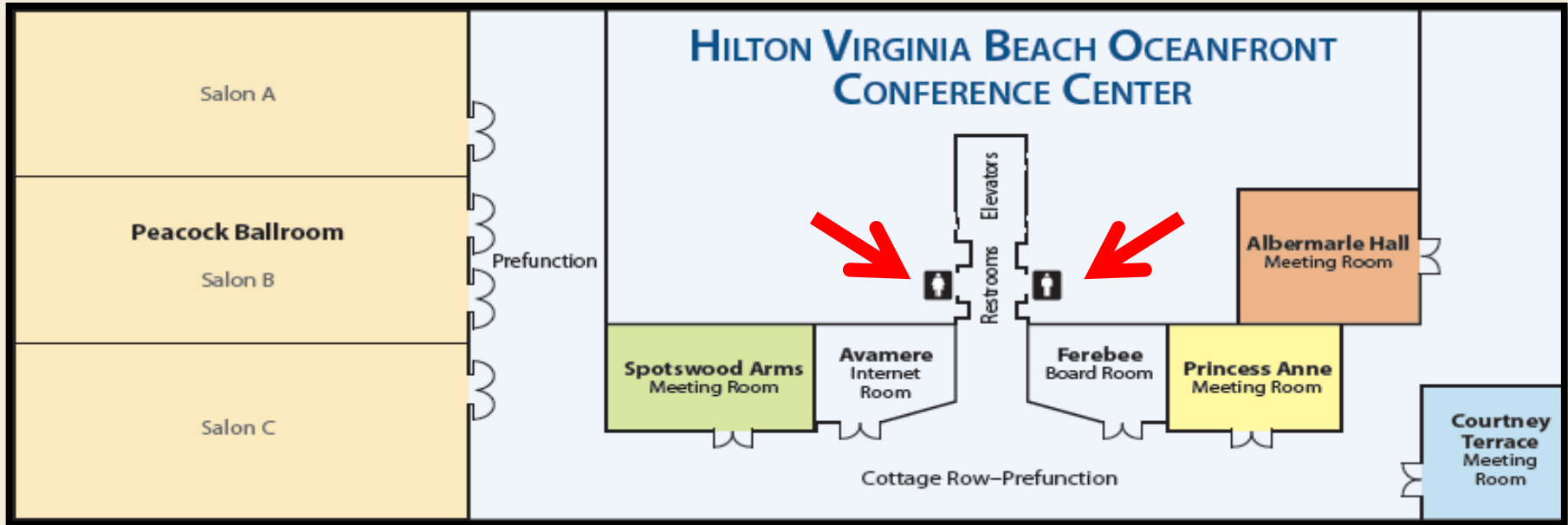
## Best Practices for Overdue Processing

*Kerry Keegan*

# Today's Schedule

<b>Presentation Sessions</b> .....	9:45am-12:00pm
<b>Lunch</b> .....	12:00pm-1:00pm
<b>Unconference</b> .....	1:00pm-3:00pm

*Airport Shuttles to Norfolk International Airport arranged by Orange Peel Transportation leave from the Hilton front entrance on Thursday and Friday*



Stop by and chat with Atlas Staff

Don't forget—

**Ask Atlas**

short tips and tricks videos are included in the Video Training Library.

★

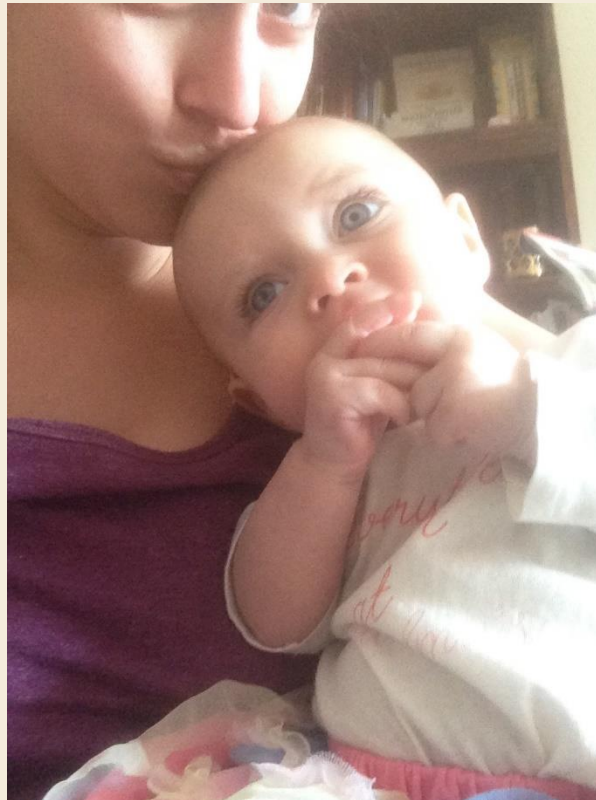
ATLAS SYSTEMS  
TRAINING & LIBRARY SOLUTIONS  
<https://training.atlas-sys.com/>

★

# Kerry Keegan

Kerry Keegan is a Customer Service Agent for Atlas Systems and serves as the implementation leader for ILLiad licensees, providing training and support for new and existing sites. From 2009 to 2012, she served as Head of Access Services for Stony Brook University's Health Sciences Library. Her interests include andragogy, instructional design, and creative uses of limited budgets.

She holds a BA in English from Stony Brook University, a MS in Library and Information Science from Queens College, and a Master of Professional Studies degree, with a focus on Human Resource Management from Stony Brook University. She serves as Section Editor for RUSA STARS and is mother to Adaleigh the human and Remington the Pomeranian, who are both disgustingly cute.



# Overdue Notifications



**Automated  
after version  
8.3**

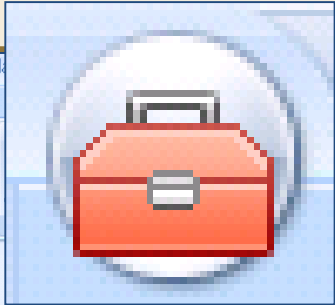


**Overdue!**

**Streamlined**

**No Duplicates**

# Customization Manager



ILLiad Customization Manager - 8.3.4.0 (hbk)

Home

New Record Table Options Copy Record Editing Options Save Delete Cancel Show Change History Maintenance Search Favorites

- Borrowing
- Contact Information
- Doc Del
- Lending
- Odyssey
- System
- System Billing
- Web Interface

### BorrowingOverdue1Docs

**Settings**

Key Value  
BorrowingOverdueLetter1.doc

Description  
Borrowing overdue letter Word document to auto-open

Value Changed From	Value Changed To	Changed Time	Changed By
--------------------	------------------	--------------	------------

Double-click a tracking row to revert to the previous value.

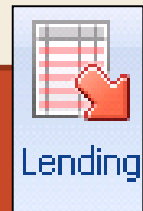
ate

Print

# Examples for Borrowing Overdues



Lending Customized  
Separately



# Overdue Notification Schedule

## Four Notification Options

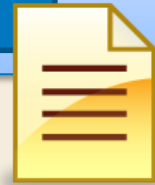
**ReminderDaysBeforeDueDate**

**Reminder**



**OverdueGraceDays**

**Notice 1**



**OverdueNoticeOneDays**

**Notice 2**



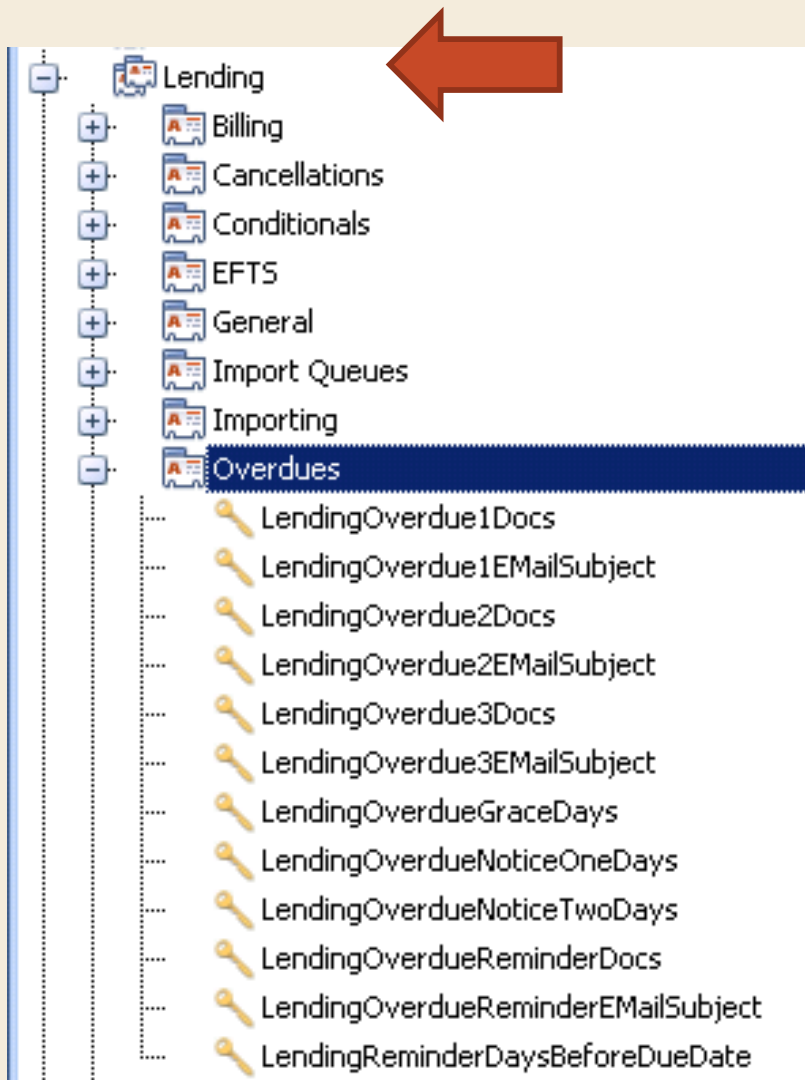
**OverdueNoticeTwoDays**

**Notice 3**



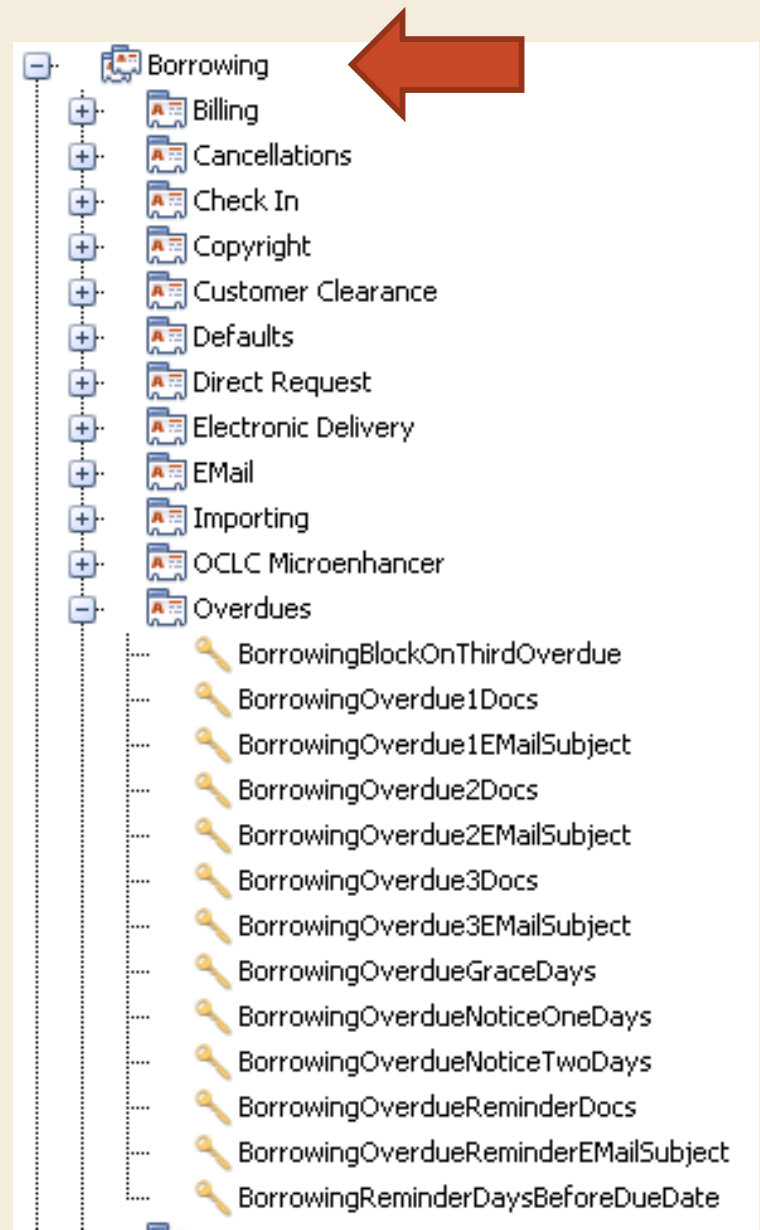


# Customization Manager



**Lending**

- Billing
- Cancellations
- Conditionals
- EFTS
- General
- Import Queues
- Importing
- Overdues**
  - LendingOverdue1Docs
  - LendingOverdue1EMailSubject
  - LendingOverdue2Docs
  - LendingOverdue2EMailSubject
  - LendingOverdue3Docs
  - LendingOverdue3EMailSubject
  - LendingOverdueGraceDays
  - LendingOverdueNoticeOneDays
  - LendingOverdueNoticeTwoDays
  - LendingOverdueReminderDocs
  - LendingOverdueReminderEMailSubject
  - LendingReminderDaysBeforeDueDate



**Borrowing**

- Billing
- Cancellations
- Check In
- Copyright
- Customer Clearance
- Defaults
- Direct Request
- Electronic Delivery
- EMail
- Importing
- OCLC Microenhancer
- Overdues**
  - BorrowingBlockOnThirdOverdue
  - BorrowingOverdue1Docs
  - BorrowingOverdue1EMailSubject
  - BorrowingOverdue2Docs
  - BorrowingOverdue2EMailSubject
  - BorrowingOverdue3Docs
  - BorrowingOverdue3EMailSubject
  - BorrowingOverdueGraceDays
  - BorrowingOverdueNoticeOneDays
  - BorrowingOverdueNoticeTwoDays
  - BorrowingOverdueReminderDocs
  - BorrowingOverdueReminderEMailSubject
  - BorrowingReminderDaysBeforeDueDate

# Reminder

The screenshot shows a software interface with a tree view under the 'Borrowing' category. The tree view includes the following items:

- Borrowing
  - Billing
  - Cancellations
  - Check In
  - Copyright
  - Customer Clearance
  - Defaults
  - Direct Request
  - Electronic Delivery
  - EMail
  - Importing
  - Overdues
    - BorrowingBlockOnThirdOverdue
    - BorrowingOverdue1Docs
    - BorrowingOverdue1EMailSubject
    - BorrowingOverdue2Docs
    - BorrowingOverdue2EMailSubject
    - BorrowingOverdue3Docs
    - BorrowingOverdue3EMailSubject
    - BorrowingOverdueGraceDays
    - BorrowingOverdueNoticeOneDays
    - BorrowingOverdueNoticeTwoDays
    - BorrowingOverdueReminderDocs
    - BorrowingOverdueReminderEMailSubject
    - BorrowingReminderDaysBeforeDueDate**
  - Printing

A red arrow points to the 'BorrowingReminderDaysBeforeDueDate' item.

**BorrowingReminderDaysBeforeDueDate**

**Reminder**

**1**

**Reminder: Items Due  
Tomorrow**



# Overdue Notification Schedule

The screenshot shows the ILLiad Customization Manager interface. The title bar reads "ILLiad Customization Manager - 8.4.1.0 (hblack)". The main window is divided into a left-hand navigation tree and a central configuration area. The navigation tree includes categories like "Borrowing" and "Overdues", with "BorrowingOverdueGraceDays" selected and highlighted in blue. A red arrow points to this selection. The central area displays the configuration for "BorrowingOverdueGraceDays", with a "Settings" section circled in red. This section contains a "Key Value" field with the number "1" and a "Description" field with the text "Number of days after the Borrowing due date".

**BorrowingOverdueGraceDays**

**Settings**

Key Value  
1

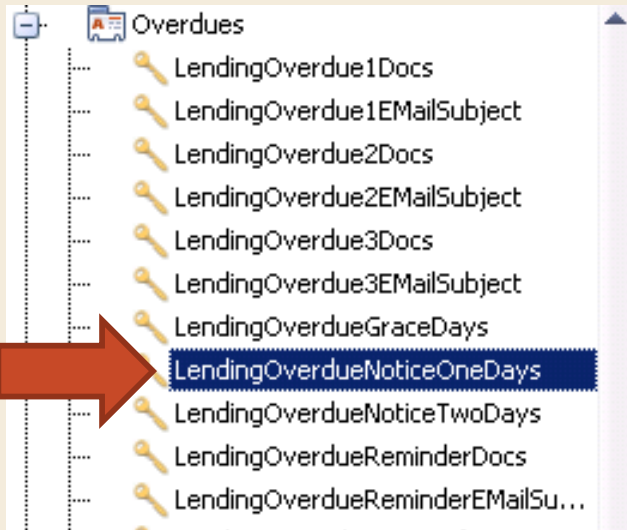
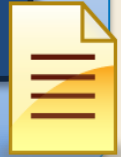
Description  
Number of days after the Borrowing due date

**Notice 1**

**Days after Due Date to send Notice 1**

# Overdue Notification Schedule

Notice 2



## LendingOverdueNoticeOneDays

ILL

Key Value

7

Description

The number of days after the due date that it still is considered Level One overdue. After this many days it moves to Level Two.

**LendingOverdueNoticeOneDays  
Days Between Due Date & Notice 2**

# Overdue Notification Schedule

## Notice 3

The screenshot shows a web interface for configuring overdue notification settings. On the left is a sidebar menu titled 'Overdues' with various options. The option 'BorrowingOverdueNoticeTwoDays' is highlighted in blue, with a red arrow pointing to it. The main content area shows the configuration for 'BorrowingOverdueNoticeTwoDays' with a 'Settings' section containing a 'Key Value' field set to '14'. A red box highlights this field. Below the settings is a 'Description' field with text explaining the setting. At the bottom, there is a 'Tracking' section with a button for 'All Sites'.

Overdues

- BorrowingBlockOnThirdOverdue
- BorrowingOverdue1Docs
- BorrowingOverdue1EMailSubject
- BorrowingOverdue2Docs
- BorrowingOverdue2EMailSubject
- BorrowingOverdue3Docs
- BorrowingOverdue3EMailSubject
- BorrowingOverdueGraceDays
- BorrowingOverdueNoticeOneDays
- BorrowingOverdueNoticeTwoDays**
- BorrowingOverdueReminderDocs
- BorrowingOverdueReminderEMailSubject
- BorrowingReminderDaysBeforeDueDate

### BorrowingOverdueNoticeTwoDays

ILL

**Settings**

Key Value  
14

Description  
The number of days after the Borrowing due date that it still is considered Level Two overdue. After this many days it moves to Level Three.

Tracking All Sites

**BorrowingOverdueNoticeTwoDays  
Days Between Due Date & Notice 3**

# Block Delinquent Borrowing Accounts



Reminder



Notice 1



ILLiad

Blocked

Notice 2

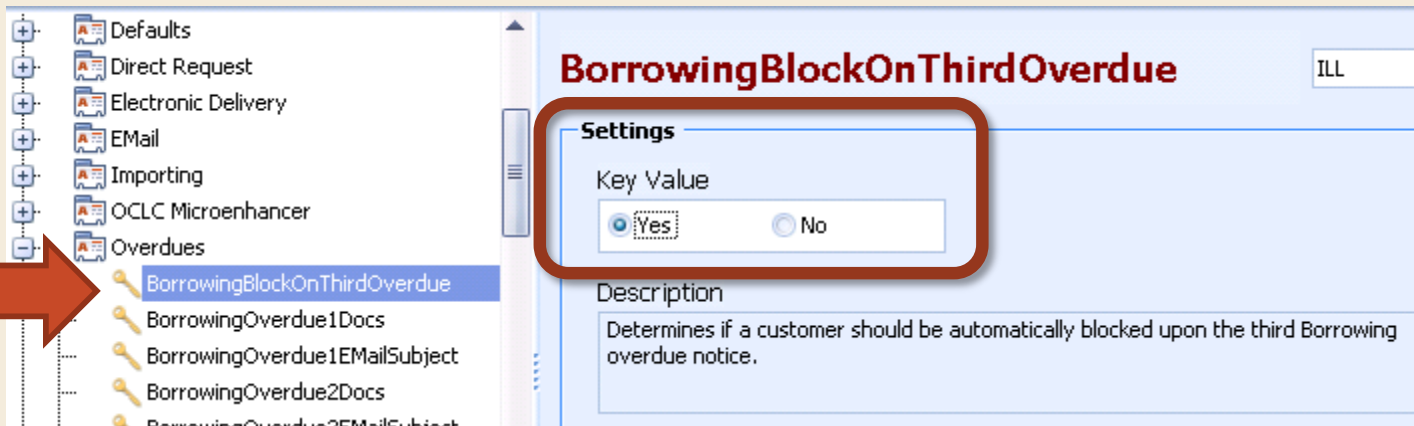


Notice 3



# Set Key

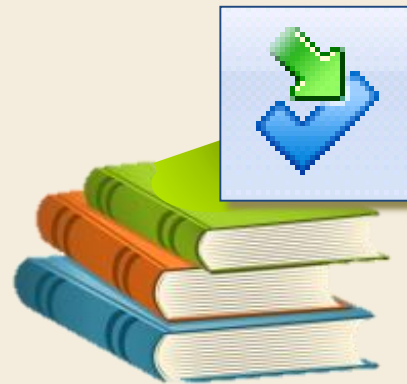
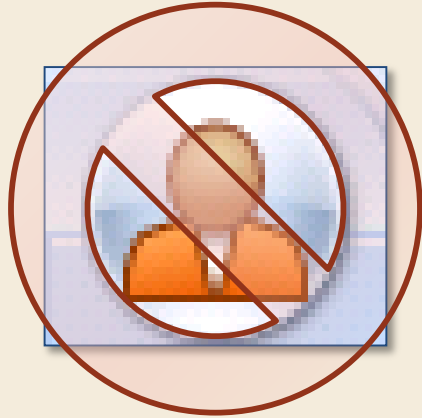
## Customization Manager



The screenshot displays the Customization Manager interface. On the left, a tree view shows categories like Defaults, Direct Request, Electronic Delivery, Email, Importing, OCLC Microenhancer, and Overdues. The 'Overdues' category is expanded, and 'BorrowingBlockOnThirdOverdue' is selected. A red arrow points to this item. The main panel shows the settings for 'BorrowingBlockOnThirdOverdue' (ILL). The 'Settings' section is highlighted with a red box, showing the 'Key Value' set to 'Yes' (selected) and 'No' (unselected). The 'Description' section states: 'Determines if a customer should be automatically blocked upon the third Borrowing overdue notice.'



# Release Block



**Check-In  
Warning**





# BREAKING NEWS

Sacramento

Marion

Elk Grove & South Sacramento

Roseville

Lake of the Pines/Meadow Vista

Sacramento

Grass Valley/Cascade Shores

West Sacramento

# **Overdue blocks will be AUTOMATICALLY REMOVED in 8.6!**

- ONLY removed if all items at Notice Level 3 are returned
- WILL be removed if user has overdue items that are at other notice levels

# Email Templates

Customization Manager

The screenshot displays the ILLiad Customization Manager interface. The main window has a title bar that reads "ILLiad Customization Manager" and a menu bar with "Home", "Z39.50", "E-mail Templates", and "Server Addons". The "E-mail Templates" menu item is highlighted with a red box. Below the menu bar is a toolbar with icons for "New", "Edit", "Copy", "Save", "Delete", and "Cancel". The "Edit" icon is highlighted with a yellow box. A red arrow points to the "New" icon. On the left side, there is a tree view with the following items: Borrowing, Contact Information, Doc Del, Lending, Odyssey, System, System Billing, and Web Interface. The "Borrowing" item is selected. A context menu is open over the "Borrowing" item, listing the following templates: Article Exchange, ArticleExchangeLendingNotification, BorrowingOverdue1, BorrowingOverdue2, BorrowingOverdue3, BorrowingOverdueReminder, ElecDel Reminder, Full Text Link, LendingOverdue1, LendingOverdue2, LendingOverdue3, LendingOverdueReminder, and Overdue4. A red bracket groups the "BorrowingOverdue1", "BorrowingOverdue2", and "BorrowingOverdue3" items. A brown callout box with the text "Borrowing Overdues" is positioned to the right of the bracket. Below the context menu, there are additional items: BorrowingOverdue2EMailSubject, BorrowingOverdue3Docs, and BorrowingOverdue3EMailSubject. The background shows a form with a text input field containing "NWTGC: ILL" and a label "Overdues for the first overdue period.".

# Edit Template

Template Details

Name:  NVTGC:

Description:

Dear <#FirstName> <#LastName>,  
This is to remind you that your Interlibrary Loan item that you have borrowed will be due on <#DueDate>.  
Title: <#LoanTitle>  
Author: <#LoanAuthor>  
Due Date: <#DueDate>  
TN: <#TransactionNumber>

Your prompt return is appreciated by your library and the one from which it was borrowed.

Interlibrary Loan office hours are <#BorrowingHours>.

Thank you for using Interlibrary Loan and <#SystemName>.  
Questions and comments regarding Interlibrary Loan policies and procedures may be directed to <#GeneralEmailAddress>  
Our office phone number is <#GeneralPhone>.  
Your phone number is: <#Phone>

**Email Template Syntax:  
<#FieldLabel>**

**Edit Here**

# Edit Template

**DO NOT  
EDIT!**

## Template Details

Name:

BorrowingOverdue1

NVTGC:

ILL

Description:

The email text used when sending the first overdue period.

Dear <#FirstName> <#LastName>,

This is to remind you that your Interlibrary Loan item that you have borrowed will be due on <#DueDate>

Title: <#LoanTitle>

Author: <#LoanAuthor>

Due Date: <#DueDate>

TN: <#TransactionNumber>

Your prompt return is appreciated by your library and the one from which it was borrowed.

Interlibrary Loan office hours are <#BorrowingHours>.

Thank you for using Interlibrary Loan and <#SystemName>.

Questions and comments regarding Interlibrary Loan policies and procedures may be directed to <#GeneralEMailAddress>

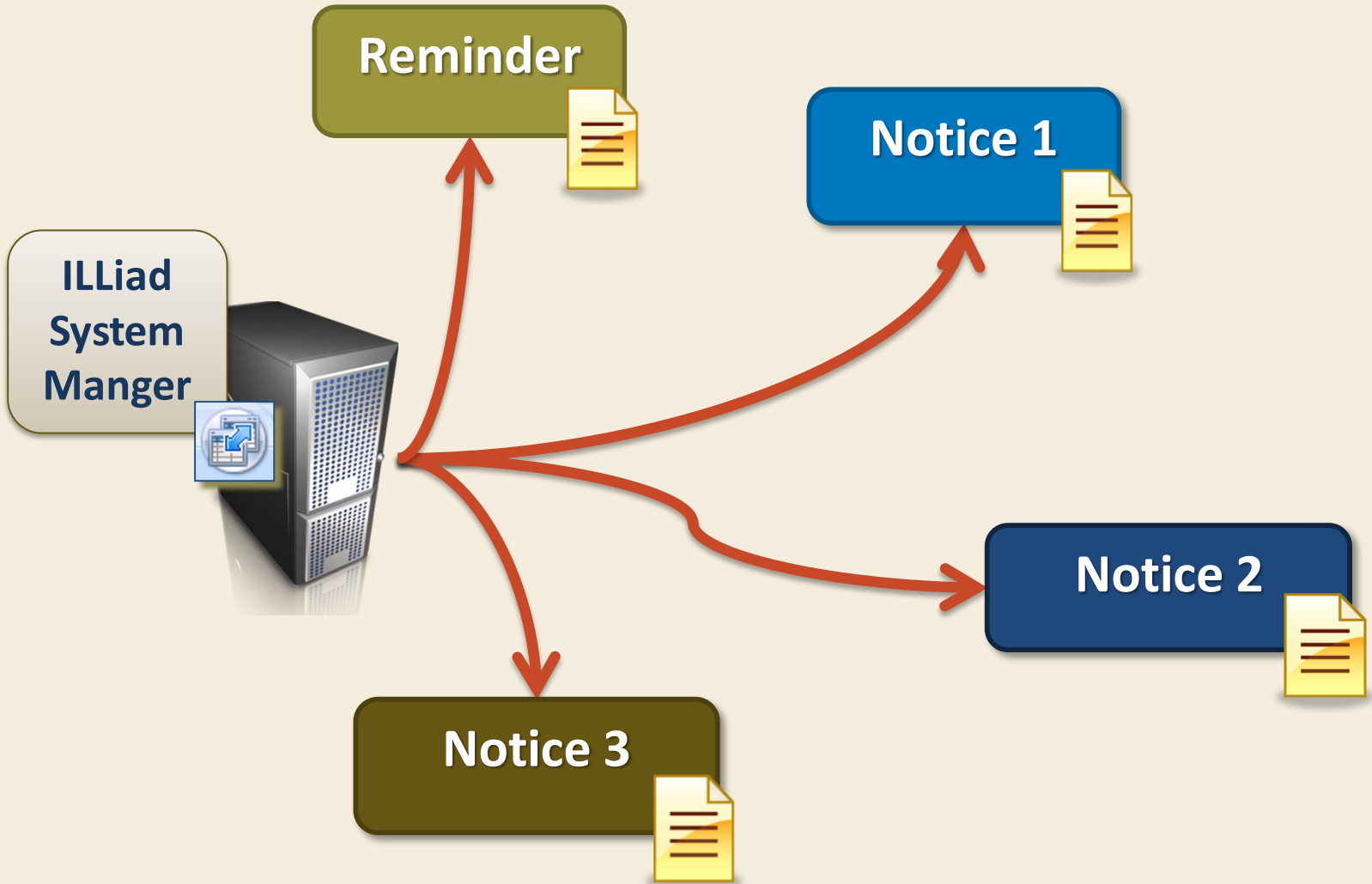
Our office phone number is <#GeneralPhone>.

Your phone number is: <#Phone>



## ILLiad Email Documentation

- > ILLiad Configuration Guide
  - > Configuring Email
    - > Creating and Editing Email Templates



# Customization Manager Keys

## Activate Overdue Service

The screenshot displays the Customization Manager interface for ILLiad. The top navigation bar includes 'Home', '239.50', 'E-mail Templates', and 'Server Addons'. Below this is a toolbar with icons for 'New Record', 'Copy Record', 'Save', 'Delete', 'Cancel', 'Show Change History', 'Search All Tables and Keys', 'Favorites', and 'Setup Wizards'. The main content area shows a tree view on the left with categories like 'Borrowing', 'Contact Information', 'Doc Del', 'Lending', 'Odyssey', and 'System'. The 'System' category is expanded, showing sub-items like 'Billing', 'Custom Queues', 'Database Manager', 'Docline', 'EMail', and 'General'. The 'BorrowingOverdueNoticesActive' key is selected and highlighted. The right pane shows the settings for this key, with the 'Key Value' set to 'Yes' and a description: 'Enables or disables the processing of borrowing overdue notification e-mails via System Manager.' A table below shows the change log for this key.

Value Changed From	Value Changed To	Changed Time
No	Yes	9/6/2012 12:38 PM



## **IMPORTANT!**

**BorrowingOverdueNoticesActive = No**

- **No overdues will be produced**
- **Manual notification handled through email routing**

**Check the documentation for manual  
overdue notifications**

# Customization Manager Keys

Set Time for Notice Production


The screenshot displays the Customization Manager application interface. The top navigation bar includes 'Home', 'Z39.50', 'E-mail Templates', and 'Server Addons'. Below this is a toolbar with icons for 'New Record', 'Copy Record', 'Save', 'Delete', 'Cancel', 'Show Change History', 'Search All Tables and Keys', 'Favorites', and 'Setup Wizards'. The main content area is divided into a left-hand tree view and a right-hand configuration panel.

The left-hand tree view shows a hierarchy of categories. The 'System' category is expanded, and the 'OverdueNoticesRuntime' key is selected and highlighted. Red arrows point to the 'System' category, the 'General' sub-category, and the 'OverdueNoticesRuntime' key.




The right-hand configuration panel displays the details for the 'OverdueNoticesRuntime' key. The 'Settings' section shows the 'Key Value' set to '8:00am'. The 'Description' section states: 'The time each day at which the system manager should process overdue notification emails.'

A large blue callout box in the bottom right corner contains the text: 'HOSTED SEVERS: Set on Eastern Time'.

# Print Notices



jojostudent@wlt.edu

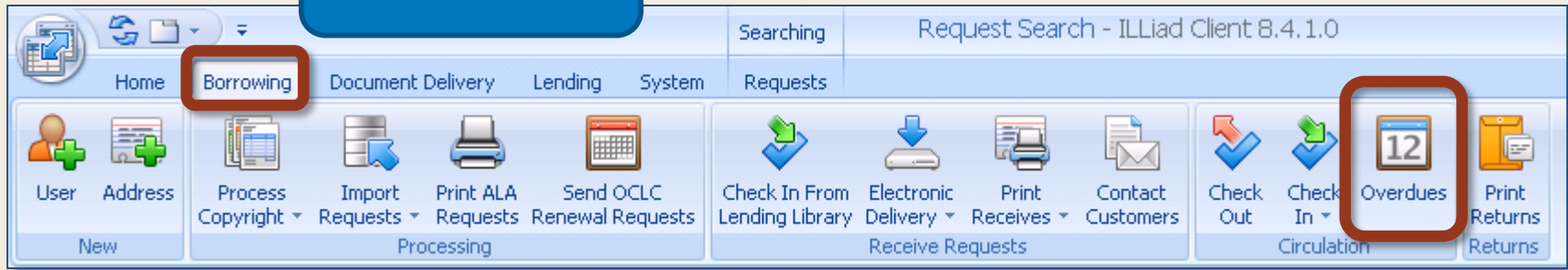


444 W. 9<sup>th</sup> Ave.  
Winterset, ID 86452

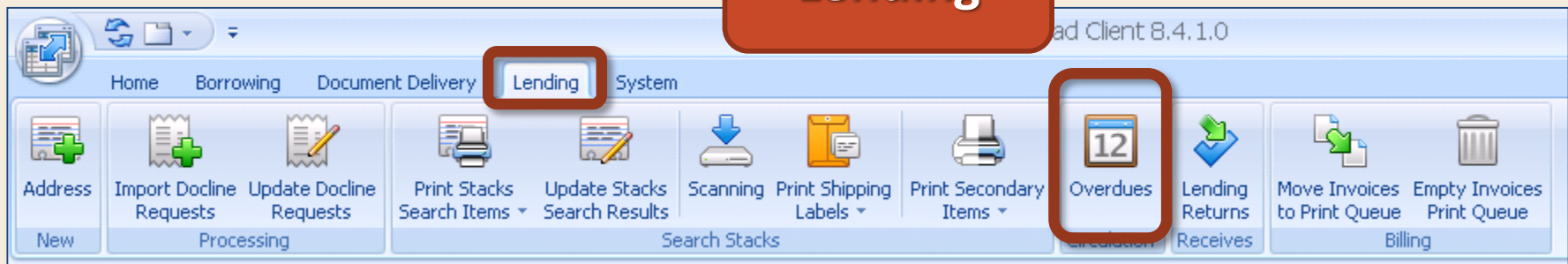
The image is a composite graphic for a 'Print Notices' system. It features a central light blue rounded rectangle containing a user profile icon (a person in an orange suit) and an email address 'jojostudent@wlt.edu' in a dark blue box. Below this rectangle are three icons: a printer, a cursor pointing to an envelope, and a mailbox with a red flag. To the right of the mailbox is a dark blue rounded rectangle containing the address '444 W. 9th Ave. Winterset, ID 86452' in white text.

# Access Overdues in Client

## Borrowing



## Lending



# Overdue Workspace

The screenshot displays a library management system interface with a table of overdue notices. The interface includes a top navigation bar with 'Main' and 'Borrowing Overdues' tabs, and a left sidebar with a 'Process' section containing 'Print Overdue Notices', 'Route', and 'Send E-mail Overdue Notices' options. The main table has columns for 'TransactionNumber' and 'LoanTitle'. The notices are grouped by type: Print, Email (Reminder), and Notice. A red arrow points to the 'Type of Notice' column, and a blue arrow points to the 'Notice Number' column.

TransactionNumber	LoanTitle
<b>Print</b>	
[-] Notice 2	
29	Goleman, Daniel. Emotional intelligence /
[-] Notice 3	
1164	Ambandos, Andrea Learning guitar for dumm
1165	Marrocco, W Music in America : an ant
<b>Email</b>	
[-] Reminder	
722	Taylor, Carol Treasures for the Christm
1584	Brinkley, Douglas. The wilderness warrior :
[-] Notice 1	
952	Sayers, Dorothy L. (Dorothy Leigh), 1893-1957. Strong poison /
[-] Notice 2	
1191	Kohl, MaryAnn F. Good Earth art : environ
1349	Collins, Billy Nine Horses
[-] Notice 3	
64	Doss, James D. Shadow man /
661	Wyly, Sam. Beyond Tallulah : how Sa
1690	Davidson, Diane Mott Prime cut

# Print Notices

The screenshot displays a library system interface on the left and a Microsoft Word document on the right. The library system interface includes a 'Print Overdue Notices' button (highlighted with a red box and arrow) and a table of notices. The Microsoft Word document shows a letter template for a borrowing overdue notice.

**Library System Interface:**

- Buttons: Borrowing, Document Delivery, Lending, System, Borrowing Overdues
- Navigation: Main, Borrowing Over
- Table Headers: TransactionNumber, LoanAut
- Print Section:
  - Notice 2: 29 Goleman
  - Notice 3: 1164 Amband, 1165 Marrocc
- Email Section:
  - Reminder: 722 Taylor, C, 1584 Brinkley,
  - Notice 1: 952 Sayers,
  - Notice 2: 1191 Kohl, Ma, 1349 Collins, B
  - Notice 3: 64 Doss, Je, 661 Wyly, Sa, 1690 Davidso

**Microsoft Word Document:**

BorrowingOverdueLetter1.doc [Compatibility Mode] - Microsoft Word

File Home Insert Page Layout References Mailings Review View Add-Ins

Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Rules Match Fields Update Labels Preview Results Find Recipient Auto Check for Errors Finish & Merge Finish

Dear Margaret Avison

The following item that you have check-out via Interlibrary Loan is now **overdue**.

TN: 1164

Title: Learning guitar for dummies

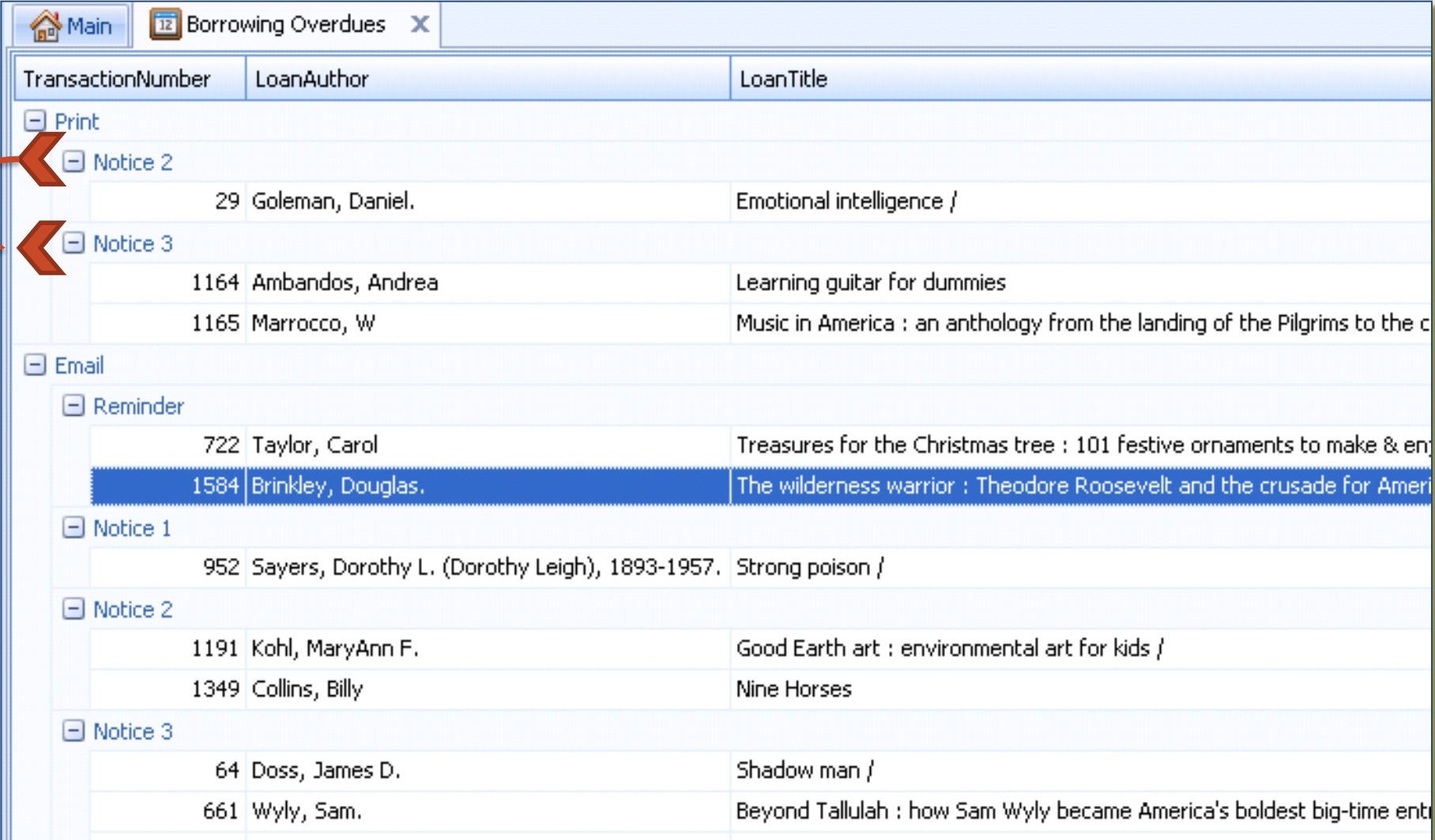
Author: Ambandos, Andrea

Due Date: 10/31/2012

Please return as soon as possible. Your account will be charged \$1.00 for each day that it remains overdue.

Questions can be directed to  
Borrowing Black  
borrowing@atlas-sys.com  
970-985-3214

# Print Notices



TransactionNumber	LoanAuthor	LoanTitle
<input type="checkbox"/> Print		
<input type="checkbox"/> Notice 2		
29	Goleman, Daniel.	Emotional intelligence /
<input type="checkbox"/> Notice 3		
1164	Ambandos, Andrea	Learning guitar for dummies
1165	Marrocco, W	Music in America : an anthology from the landing of the Pilgrims to the c
<input type="checkbox"/> Email		
<input type="checkbox"/> Reminder		
722	Taylor, Carol	Treasures for the Christmas tree : 101 festive ornaments to make & en
1584	Brinkley, Douglas.	The wilderness warrior : Theodore Roosevelt and the crusade for Ameri
<input type="checkbox"/> Notice 1		
952	Sayers, Dorothy L. (Dorothy Leigh), 1893-1957.	Strong poison /
<input type="checkbox"/> Notice 2		
1191	Kohl, MaryAnn F.	Good Earth art : environmental art for kids /
1349	Collins, Billy	Nine Horses
<input type="checkbox"/> Notice 3		
64	Doss, James D.	Shadow man /
661	Wyly, Sam.	Beyond Tallulah : how Sam Wyly became America's boldest big-time ent

# Extremely Overdue Items

The screenshot shows a library system interface with a top navigation bar containing 'Home', 'Borrowing', 'Document Delivery', 'Lending', and 'System'. Below this is a toolbar with icons for 'Print Overdue Notices', 'Route', 'Send E-mail', and 'Reset Last Overdue Notice'. The 'Reset Last Overdue Notice' icon is highlighted with a red box. A red callout box in the top right corner contains the text: **\*\*Changing Status Removes from Overdue List\*\***. A blue callout box in the center contains the text: **Use Email Routing for Additional Notices**. A red arrow points from the 'Route' icon to a dropdown menu on the left. This menu lists various statuses, with 'Delinquent Account' highlighted by a red box. A blue callout box at the bottom left contains the text: **Manually Route to Custom Queue**. Another red arrow points from the 'Send E-mail' icon to a dropdown menu on the right. This menu lists various notification types, with 'Overdue Account Charged' highlighted by a red box. The main area of the interface displays a table of overdue items with columns for 'Loan Author' and 'Loan Title'. The table contains several rows of data, including '29 Goleman, Daniel.', '1164 Ambandos, Andrea', '1165 Marrocco, W', '1191 Kohl, MaryAnn F.', '1349 Collins, Billy', '64 Doss, James D.', and '661 Wyly, Sam.'. A 'Notice 3' icon is visible next to the '64 Doss, James D.' row.

Loan Author	Loan Title
29 Goleman, Daniel.	
1164 Ambandos, Andrea	
1165 Marrocco, W	
1191 Kohl, MaryAnn F.	Good Earth art : environmental art for kids /
1349 Collins, Billy	Nine Horses
64 Doss, James D.	Shadow man /
661 Wyly, Sam.	Beyond Tallulah : how Sam Wyly became America's boldest big-time



# Tips, Tricks, and Best Practices



## **How do I know when an overdue has been sent?**

- For print overdues look in the Event Log on the System ribbon
- For e-mail overdues you can look at the history of a specific record
- You can also look at the Checked Out to Customer queue
  - Scroll over to Last Overdue Notice Sent
  - You can drag the field in the grid to another location
    - Also can right click for Customizing Options

# Grid Layouts

Checked Out to Customer

Drag a column header here to group by that column

Transactio...	Username	Last Overdue Notice Sent	Request T...	Loan Author	Loan Title	Loan Publis...	Loa						
29	johnb		3 Loan	john grisham	runaway jury								
56	fredfunk		3 Loan	Grisham, Jo...	The runawa...								
61	fredfunk		3 Loan	Rey, Margret.	Curious Ge...	Houghton ...	Boston	1958					
68	johnb		3 Loan	Rand, Ayn.	Atlas shrug...								
91	johnb2		3 Loan	Rey, Margret.	Curious Ge...	Houghton ...	Boston	1958					
227	max		3 Loan	Rand, Ayn.	Atlas shrug...			1957		The whole ...	6		
230	max		3 Loan	Rey, H. A. ...	Curious Ge...	Houghton ...	Boston	1963					

atlas | 7 requests

# Tips, Tricks, and Best Practices



## How can I export reports?

- Run a Custom Search to locate overdues at a specific level
  - Go to the Home ribbon and click on the little arrow in the lower right corner of the Search Requests group
  - Select Custom Requests Search
- Formulate your search or load a previously saved search
  - Run the search by clicking the Search icon in the upper left of the screen

# Custom Searches

May be saved and loaded for easy retrieval

The screenshot displays the ILLiad Client 8.3.4.0 interface. At the top, a blue callout box states "May be saved and loaded for easy retrieval". The main window is titled "Custom Request Search - ILLiad Client 8.3.4.0". The interface includes a toolbar with icons for Search, Preview, Clear, Save, and Load. Below the toolbar, there is a "Search Description" field containing "BorrowingOverdueTransactions". To the right of this field are buttons for "Open", "Route", "Send E-mail", and "Export". A red arrow points to a tab labeled "Custom Request Search". The main area shows a search query: "And [Transactions.TransactionStatus] Equals Checked Out to Customer [Transactions.Last Overdue Notice Sent] Is any of (1, 2, 3)". Below the query is a table with columns: "Transac...", "Username", "Request T...", and "Loan Author". A red arrow points to a settings panel on the right titled "SharedCustomSearchesPath". This panel has a "Settings" section with a "Key Value" field and a "Description" field containing the text: "The directory the client should check for saved custom search files." A blue callout box at the bottom right of the settings panel states "Use SharedCustomSearchPath to easily share with coworkers". A list of system settings is visible on the left side of the settings panel, with "SharedCustomSearchesPath" highlighted.

Use SharedCustomSearchPath to easily share with coworkers

# Tips, Tricks, and Best Practices



## **How can I stop overdues from going out for a particular transaction?**

- Overdues go out for transactions that are at Item Shipped in Lending and Checked Out to Customer in Borrowing
- You can create a Custom Queue to keep track of transactions
  - Gets them out of overdue process
  - Keeps them in one place for easy identification

# Tips, Tricks, and Best Practices



## To create a Custom Queue:

- Open the Customization Manager
- Go to System, Custom Queues, and open the Custom Queue Table
- Click on New Record at the top
- Enter the following values:
  - Queue Name = what you want to call the queue
  - Process Type = Borrowing or Lending
  - NVTGC = your site code (should be filled in)
- Click on the Save icon at the top of the form
- The Custom Queue should now be available under the Route icon in the ILLiad Client

# Custom Queues

The screenshot displays the ILLiad Customization Manager interface. The title bar reads "ILLiad Customization Manager - 8.3.4.0 (atlas)". The top navigation bar includes "Home", "Z39.50", "E-mail Templates", and "Server Addns". Below this is a toolbar with icons for "New Record", "Copy Record", "Save", "Delete", "Cancel", "Show Change History", "Search All Tables and Keys", "Favorites", and "Setup Wizards".

The left sidebar contains a tree view of system components. A red arrow points to the "Custom Queues" folder, which is expanded to show "CustomQueues" and "QueueSort".

The main content area is titled "CustomQueues" and contains a table with the following data:

QueueName	ProcessType	NVTGC
Awaiting Conditional Processing	Borrowing	ILL
Awaiting Conditional Request Processing	Lending	Lending
Awaiting Direct Request Sending	Borrowing	ILL
Awaiting ISO ILL Request Processing	Lending	Lending
Awaiting Lending Request Processing	Lending	Lending
Awaiting OCLC Sending	Borrowing	ILL
Awaiting Renewal Request Processing	Lending	Lending
Awaiting RUSH Request Processing	Lending	Lending

Below the table is an "Edit Row" form with the following data:

Queue Name	Really Overdue
Process Type	Borrowing
NVTGC	ILL

# Tips, Tricks, and Best Practices

## How can I make more notice emails?

- Create the e-mail templates that you referenced in your rule, if they do not already exist
  - At the top of the Customization Manager, go to E-mail Templates
  - Click on New at the top of the form
  - Enter the Name, Description, and text
  - Click on the Save icon
- Create an Email Routing Rule
  - Open the Customization Manager and go to System, Email, and open the EmailRouting table
  - Click on New Record or Copy at the top of the form



# EmailRouting

The screenshot shows the ILLiad Customization Manager interface. The sidebar on the left contains a tree view of system components, with 'EmailRouting' highlighted. The main area displays a table of EmailRouting entries. A red box highlights the 'New Record' button in the top toolbar. A red arrow points from the 'Really Overdue Email' row in the table to the 'Edit Row' dialog box. The dialog box shows the configuration for the selected row, including fields for Process Type, Name, Default To Address, Default To Name, Default CC Address, Default Subject, Default From Address, and Default From Name. The 'File Name Loan' and 'File Name Article' fields are also highlighted with a red box.

ProcessType	Name	DefaultToAddress	DefaultToName
Borrowing	Loan Recall		
Borrowing	Really Overdue Email		
Lending	Article Exchange		
Lending	Send Request to Remote Storage	jbrunswick@atlas-sys.com	John Brunswick

Process Type	Borrowing
Name	Really Overdue Email
Default To Address	
Default To Name	
Default CC Address	
Default Subject	Item Really Overdue
Default From Address	ill@yoursite.edu
Default From Name	Your Library
Default Status	
File Name Loan	reallyoverdue
File Name Article	reallyoverdue

Same process can make manual email options using default templates or extra notification levels

EmailRouting name does NOT have to match Email Template name

# Details on Overdues

## Borrowing Overdue Documentation

- > ILLiad User Guide
  - > Borrowing
    - > Processing and Circulating Requests
      - > Circulating Materials through ILLiad
        - > Processing Borrowing Overdues

## Lending Overdue Documentation

- > ILLiad User Guide
  - > Lending
    - > Processing Recalls and Lending Overdues

Questions? Comments? Stories to Share?



# THANKS FOR COMING!

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