Minding your Flags & Queues

Tools to Organize your Work

Flags

- How They Work
- Workflow Examples

Custom Queues

- How They Work
- Workflow Examples

Routing Rules

- How they work
- Workflow Examples

Case Studies

- Document Delivery services
- Serving distance education students
- Purchase on-demand

Flags

- New in 8.5
- Additional categorization
  - Applied independent of status
  - Status/queue stays the same
  - Do not display to patron
  - Search-able with custom search
  - Can apply multiple flags to the same request
- Think of as virtual sticky notes
- Special Message flags
  - System assigned
  - Display like others
  - System-checked every 12 hours
- Create Flags
  - Customization Manager: System | Custom Flags | CustomFlags
  - Click **New Record**
  - Add flag name
  - Click into ID field
    - ID added automatically
  - Save
- Add or remove flags with **Remove Flag** option
  - On the **Request Form**
  - From **Grid List** view of requests in queue
- Open list of flags from **Queue**
  - Indicated with flag icon

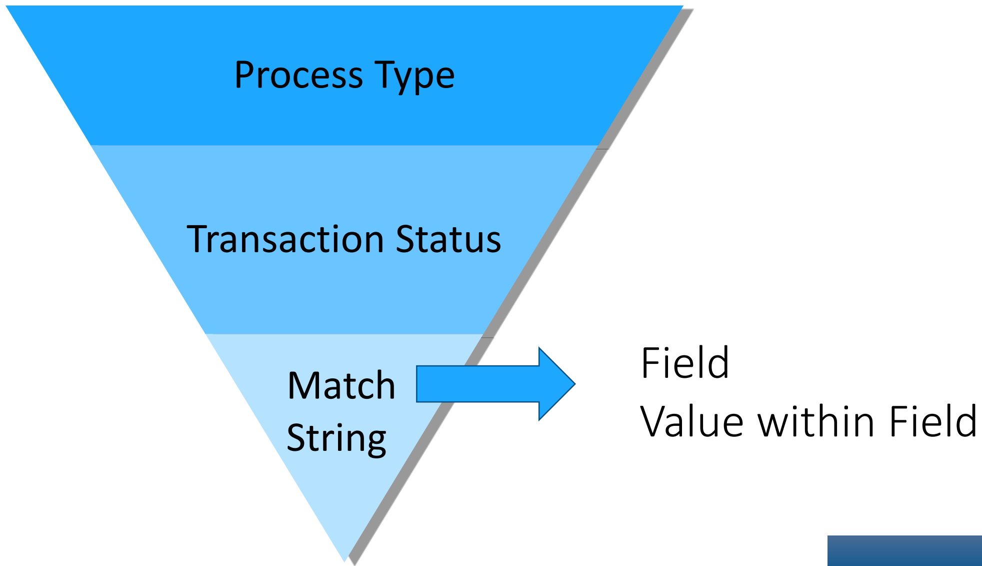
Custom Queues

- Allow you to sort requests outside of the default workflow
  - Use for problem requests, items or patrons that need special attention, etc.
  - Route manually
  - Use with email routing & routing rules
  - Status displays to patron
- Create Custom Queues
  - Customization Manager: System | Custom Queues| CustomQueues
  - Click **New Record**
  - Add queue name
  - Add Process Type
  - Save
- Use with Email Routing
  - Send email and update request to custom queue at the same time
  - Customization Manager: System | EMail | EMailRouting

System Routing

- Allows you to skip certain queues or have the system move a request to a queue automatically if the request has certain characteristics/values present
  - Every update runs a query
    - Request data is compared to the filter in the routing rule
    - Match YES
      - Request is auto-updated to new status
    - Match NO
      - Request moves to typical status update
- Create a Routing Rule
  - Customization Manager: System | Routing | Routing
  - Click **New Record** or **Copy Record**
  - Add Routing Rule values

RuleNo	Type in the number you want to be assigned with the routing rule. Each routing rule must have a unique ID.
RuleActive	Type Yes if you want this rule to be active. Type No if you want the rule to be inactive.
ProcessType	This specifies the Process Type (Borrowing, Lending or Doc Del) to which a given rule will apply.
TransactionStatus	This specifies the Transaction Status to which the rule will apply. This value may be any legitimate ILLiad status, including any Custom Queues.
MatchString	The query string for the routing rule. See further explanation below.
NewProcessType	This specifies the new Process Type (Borrowing, Lending or Doc Del) to which the transaction will be routed. It is possible to route transactions back and forth between Borrowing and Doc Del. Lending transactions cannot change RequestType.
NewTransactionStatus	The Transaction Status to which the request will be routed to. This value may be any legitimate ILLiad status, including any Custom Queues.
RuleDescription	Text that describes what the rule is intended to do.



t.RequestType = 'Article'

- Match String
    - Identify table
        - u. = Users Table (Patron Information)
        - t. = Transactions Table (Request Information)
        - l. = Lender Addresses Table (Library Information)
    - Follow with Field Label
        - Formatted as in the table
        - Find Field Label in Queue Grid view
            - Column Header
                - Same spelling and case
                - **Without space**
                - RequestType
    - Add qualification/value designated in the request
- Cautions
    - Only single quotation marks
    - Not extra characters or spaces
    - Rule numbering
        - Esp. on Shared Server
    - Do not copy & paste
    - Test thoroughly
        - Use manual routing
        - Use tracking table
    - Mutually exclusive rules
    - Daisy chaining
    - Watch for typos
    - Circular routing

Workflow PROBLEMS

Draft a routing rule to help solve the following workflow problem. Note: You might also consider creating a custom queues or custom flags as well.

- Administrators want Distance Education students to be able to submit requests for any materials that they need from one place and have asked you to figure out if it's possible to do that through ILLiad. What workflow could you use to solve this problem and make sure the requests from distance students for your own materials are not sent as ILL requests.
- Your department is increasingly borrowing items from international locations and you are looking for a better way to track items and also make sure patrons understand that the item is coming from overseas.
- You've been asked to notify collection development staff of any requests for materials (physical) from faculty members that are less than 2 years old to be evaluated for rush purchase.

Case Studies

We currently use routing rules to skip copyright processing and move requests on to OCLC direct request sending. This routing rule looks at the publication date and the ISSN field. We would like to add a routing rule prior to this rule to collect all faculty requests to review for rush purchase from a document supplier.

- What routing rule needs to be added?
- What considerations need to be made in the new workflow to accommodate the existing direct request workflow?

We would like to review all article requests in Document Delivery to evaluate for ownership and fill those from our collection in DocDel then route all "real" borrowing requests to borrowing.

- What routing rule is need to route from Copyright Clearance to Document Delivery?
- If so, how do requests get back to copyright that actually need to be checked against the list without automatically being moved back out to DocDel because of the first routing rule?

We use 3 courier systems in addition to delivering items through USPS. Each courier uses different labeling systems. How can we manage our loan processing to correctly sort items to the right courier system and make use of ILLiad's printing functionality?

- Is a routing rule appropriate for this situation? If so, what would it be?