



ILLiad

International Conference

Text Message Notifications in ILLiad 8.6

A Guide to Basic ILLiad Troubleshooting (2016)

Messaging and Notifications

- Thank you for joining me today!

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Messaging and Notifications

What Will We Talk About Today?

- What has changed about notifications in ILLiad 8.6?
- How do I set up SMS Texting in ILLiad?
- What changes do I need to make to my patron web pages?
- What changes are in the patron record?
- Tips, tricks, and things to watch out for.

What Has Changed?

- All Email Templates are now called Notification Templates and are located in the ILLiad database.
 - The templates are for more than email.
 - Includes SMS texting.
 - The templates must be located in the database.
 - The EMailLocation customization key no longer exists.
 - A number of other keys have been removed as well – Borrowing, DocDel, Lending.
 - The client relative path (for example c:\program files\illiad\email) will not work either.
 - The templates are accessed and edited through the Customization Manager.
 - Notifications tab.
 - To locate your current templates, look in the Customization Manager on the Notification Templates under Edit and on the Home ribbon under System/Mail/EmailLocation.
 - Order of preference for ILLiad 8.5 is database, EmailLocation, client relative path.

What Has Changed?

- There is a new structure for the Notification Templates
 - The templates have more flexibility on the form of additional fields
 - The templates have an E-mail tab and an SMS tab
- The fields for pulling data from the database into the template have changed
 - The new format is <#Table.Field>

What Has Changed?

- The templates have new names
 - The standard templates must be named correctly or they will not work – there is no longer a .txt extension
- Some templates have been split in two
 - Cancellation has become Borrowing Cancellation Article and Borrowing Cancellation Loan
 - Cancellation is no longer used



Home

Z39.50

Notification Templates

Server Addons



New



Edit



Copy



Save



Delete



Cancel

Templates

Editing

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

Template Details

Name: Borrowing Cancellation Loan

NVTGC:

ILL

Description: The email used when sending out the borrowing loan cancellation e-mail.

E-mail

SMS

From Name:

From Address:

To Name:

To Address:

<#User.EmailAddress>

CC Address:

BCC Address:

Subject:

Automated Interlibrary Loan Notification

Dear <#User.FirstName> <#User.LastName>,

A request you have placed:

<#Transaction.PhotoJournalTitle>

<#Transaction.PhotoJournalVolume> <#Transaction.PhotoJournalIssue> <#Transaction.PhotoJournalMonth>

<#Transaction.PhotoJournalYear>

Title: <#Transaction.PhotoArticleTitle><#Transaction.LoanTitle>

Author: <#Transaction.PhotoArticleAuthor><#Transaction.LoanAuthor>

TN: <#Transaction.TransactionNumber>

has been cancelled by the interlibrary loan staff for the following reason:

<#Transaction.ReasonForCancellation>

<#Special.CancellationNote>

If you have a question about this cancelled item, please contact the interlibrary loan office at

<#LocalInfo.BorrowingEMailAddress>

or

<#LocalInfo.BorrowingPhone>

with the Transaction Number <#Transaction.TransactionNumber>.

Thank you for using interlibrary loan and <#LocalInfo.SystemName>.

What Are The Alternatives To EMail?

- Notification by telephone
 - Not that common
- Notification by mail
 - Even less common
- Text Notification
 - The latest method in ILLiad
 - Uses the new Notification Templates in 8.6
 - Uses the Twilio addon
 - You could write your own and use a different service

What Are The Alternatives To EMail?

- To set up SMS Text Notifications you will need to:
 - Get a Twilio account
 - Download, install, and configure the Twilio addon
 - Review/edit your Notification Templates
 - Test your SMS setup
 - Edit your Web pages
 - Inform your patrons that they can now use SMS Texting

What is Twilio and How Do I Set It Up In ILLiad?

- What is Twilio?
 - A third-party software that can enable SMS text messaging from ILLiad to your patrons
 - Works with the Twilio addon
 - You could write your own if you choose
 - www.twilio.com
- How do I set it up?
 - First get a Twilio account
 - Go to www.twilio.com and click on “Get a free API key”
 - Fill out the form
 - What are you building? – SMS Alerts
 - Choose your language – I’m not a developer
 - Which product do you plan to use first? – Programmable SMS
 - Click on “Get Started”

What is Twilio and How Do I Set It Up In ILLiad?

- You will be prompted to enter your phone number
 - Make sure it is one that you can receive text messages at
 - Click on Text Me
 - Twilio will text you a code
- You will be asked to enter the code that is texted to you
- On the next screen click on “Show API Credentials” and copy the Account SID and the Auth Token of a text document – you will need them later
- Then click on Get your first Twilio Number
 - Copy the number to your text document
 - Click on Choose this Number = make sure it has SMS capabilities
- Twilio should now be set up and ready to use
 - Once you are done testing make sure to Upgrade your account

It's fast and free to get started.

What are you building?

SMS Alerts ▼

Choose your language

I'm not a developer ▼

**Which product do you
plan to use first?**

Programmable SMS ▼

Get Started

By clicking the button, you agree to our [legal policies](#).

Already have an account? [Login](#)

Get Started with Programmable SMS

✕ [Show API Credentials](#)

About Twilio Programmable SMS

Twilio Programmable SMS enables your application to send and receive text and pictures messages around the world, using local, mobile, and toll-free phone numbers as well as short codes.

To send and receive messages, a Twilio phone number is required. Get your first Twilio phone number, read our [API documentation](#), and get started building!

[Get your first Twilio Number](#)

Helpful Documentation

See how to build a simple Twilio SMS application with our [quickstart guide](#).

Visit our [Messaging REST API documentation](#).

Learn how to [receive and reply to incoming messages](#).

View our [Messaging Services documentation](#).

Not ready to build? We can help you find the right solution. [Talk to Sales](#)

How Do I Configure The Twilio Addon?

- Download the Twilio Addon
 - Go to the ILLiad Addons space and click the link to download the addon - please note that this is a Server Addon
 - Go to the ILLiad Customization Manager and click on the Server Addons tab
 - Click on “New” and name the addon “TwilioSMSNotifications. Click on “Save.”
 - From the addon folder that you downloaded open the TwilioSMSNotifications.txt file and copy/paste it into the “Code” tab of your new addon. Click on “Save.”
 - From the same addon folder open the Config.txt file and copy/paste it into the “Configuration” tab of your new addon. Click on “Save.”

How Do I Configure The Twilio Addon?

- In the Configuration fill in the following settings from Twilio:
 - <Setting name='AccountSID' value='' type='string'>
 - <Setting name='AuthToken' value='' type='string'>
 - <Setting name='FromNumber' value='' type='string'>
 - NVTGC's separated by commas IF Shared Server
 - Be careful to retain the single quotes

```
<Configuration>
<Name>Twilio SMS Notifications Addon</Name>
<Author>Atlas Systems, Inc.</Author>
<Version>1.0</Version>
<Active>>true</Active>
<Type>Server</Type>

<Description>Sends SMS Notifications using the Twilio API</Description>

<Settings>
  <Setting name='AccountSID' value='' type='string'> ← [REDACTED]
    <Description>The Twilio Account SID provided in your Twilio account settings.</Description>
  </Setting>
  <Setting name='AuthToken' value='' type='string'> ← [REDACTED]
    <Description>The Twilio AuthToken provided in your Twilio account Settings.</Description>
  </Setting>
  <Setting name='FromNumber' value='' type='string'> ← [REDACTED]
    <Description>A Twilio phone number enabled for the type of message you wish to send. Only phone numbers or short codes purchased from Twilio work here.</Description>
  </Setting>
  <Setting name='ActiveNVTGC' value='' type='string'> ← [REDACTED]
    <Description>If shared server, a comma separated list of NVTGC's that use this addon for sending SMS notifications. This setting is ignored for single server instances.</Description>
  </Setting>
</Settings>

<Forms/>
<Files/>
</Configuration>
```



```
<Configuration>
<Name>Twilio SMS Notifications Addon</Name>
<Author>Atlas Systems, Inc.</Author>
<Version>1.0</Version>
<Active>>true</Active>
<Type>Server</Type>
```

```
<Description>Sends SMS Notifications using the Twilio API</Description>
```

```
<Settings>
```

```
<Setting name='AccountSID' value='ACfc57881b7b6afe664a273d65bf9aa9b8' type='string'>
```

```
<Description>The Twilio Account SID provided in your Twilio account settings.</Description>
```

```
</Setting>
```

```
<Setting name='AuthToken' value='61a9d6d4fa26b0231ecab88ec31b2d90' type='string'>
```

```
<Description>The Twilio AuthToken provided in your Twilio account Settings.</Description>
```

```
</Setting>
```

```
<Setting name='FromNumber' value='6146811223' type='string'>
```

```
<Description>A Twilio phone number enabled for the type of message you wish to send. Only phone numbers or short codes purchased from Twilio work here.</Description>
```

```
</Setting>
```

```
<Setting name='ActiveNVTGC' value="" type='string'>
```

```
<Description>If shared server, a comma separated list of NVTGC's that use this addon for sending SMS notifications. This setting is ignored for single server instances.</Description>
```

```
</Setting>
```

```
</Settings>
```

```
<Forms/>
```

```
<Files/>
```

```
</Configuration>
```

How Do I Review and Edit My Templates For SMS?

- Open the Customization Manager and go to the Notification Templates Ribbon
- Click on Edit and select the template you wish to work on
- Click on the SMS tab in the template
- Compose/Edit the SMS message
 - Limit of 160 characters
 - Right click to add fields
 - MaxSize="N" is to prevent the message from going over limit
 - <table.field MaxSize="N"> is the format
 - You will need to manually add MaxSize="N" if appropriate



New



Edit



Copy

Templates



Save



Delete



Cancel

Editing

- Borrowing
- Contact Information
- Doc Del
- Lending
- Odyssey
- System
- Article Exchange
- Billing
- Custom Flags
- Custom Queues
- Database Manager
- Docline
- EMail
 - DocDelEMailFromAddress
 - DocDelEMailFromName
 - EMailAuthMechanism
 - EMailFromAddress
 - EMailFromName
 - EMailImport
 - EMailImportActive
 - EMailImportInterval
 - EMailNoAccountAddress
 - EMailRouting
 - EMailSecure
 - EMailSMTPPort
 - EMailSMTPServer
 - LendingEMailFromAddress
 - LendingEMailFromName
 - SMTPPassword
 - SMTPUserID
- General
- Integration

Template Details

Name: NVTGC:
Description:

E-mail

SMS

Please return this overdue item:
Title: <#Transaction.LoanTitle MaxSize="30">
Due Date: <#Transaction.DueDate>
TN: <#Transaction.TransactionNumber>

YOU ARE NOW BLOCKED from using <#LocalInfo.SystemName>.

How Do I Test The Twilio Addon?

- Restart the System Manager
 - Manually if self-hosted
 - Contact host – OCLC or Atlas
 - Change the version number in the Configuration section of the addon
 - If 1.0.0 change to 1.0.1, if 1.0.1 change to 1.0.2, etc.
- In the ILLiad Client:
 - Search for a user to test with
 - Enter the phone number that you used to setup Twilio in the “Mobile Phone” field of the patron account
 - The same number you received the text from Twilio when you set up the account
 - Set the Notification Method to “Electronic”
 - Check all of the SMS Notifications boxes
 - Save your changes

How Do I Test The Twilio Addon?

- Open a request from the “Requests” tab
 - You can use a dummy request or add one at this point
- Perform an action that will send a notification
 - For example cancel a request
- You should get a text in a few minutes
- You can check the Outgoing Notifications tab in the System section of the ILLiad Client to see the status

How Do I Troubleshoot The Twilio Addon?

- Check the following:
 - The number supplied by Twilio has SMS capability (check on the Twilio website under Phone Numbers, Manage.) You may have to release the number and get a new one. Make sure to make any changes needed in the Configuration tab of the Twilio addon.
 - The ILLiad test user's mobile phone number is the Twilio verified number from the registration process. If you no longer have access to that phone, an additional number can be verified at the Twilio website.
 - The System Manager has been restarted.
 - Single quotes are around the Auth Token, the Account SID, and the Phone number in the Configuration tab. Make sure all values are correct with no spaces between the value and the single quotes.
 - If you are Shared Server check that the NVTGC entries are correct in the Configuration tab of the addon.

What Web Page Changes Do I Need To Make?

- You can approach this two ways:
 - Download a new set of web pages for our website – www.atlas-sys.com
 - Documentation/ILLiad 8.6/Downloads/Default Web Pages
 - OR
 - Edit your existing web pages
 - Look in the documentation under ILLiad 8.6/Table of Contents/Text Notifications/Displaying Text Notification Preferences on the Web Pages

What Web Page Changes Will My Patrons See?

- When registering for the first time your patrons will see:
 - Electronic has replaced Email in Preferred Notification Method
 - There are a number of Notification Preference checkboxes for Email and for Text Message
 - A place to enter a Mobile Phone number
- Once registered your patron will see:
 - Notifications for both Email and Text Message
 - A place to enter a Mobile Phone number under Change User Information
 - Notification Preference checkboxes under Change User Information
 - Electronic has replaced Email in Preferred Notification Method under Change User Information

Account Notification Preferences

Notify me when my account has been cleared

Notify me when I request a password reset

Email

Text Message

All | None

Preferred Notification Method

When your material is ready for pickup or has been shipped

Electronic



Request Notification Preferences

Notify me when my request is ready for pickup

Notify me when my request has been shipped

Notify me when my request has been delivered electronically

Notify me when my checked out material is overdue

Notify me when my request has been cancelled

Notify me when the library has other information about my request

Email

All | None


Text Message

All | None

Submit Information

Clear Form

Cancel - Exit ILLiad System

- **Logoff johnb**
- **Main Menu**
- **New Request**
 - Photocopy
 - Book
 - Book Chapter
 - Conference Paper
 - Patent
 - Report
 - Thesis
 - Standards Document
 - Other (Free Text)
- **View**
 - Outstanding Requests
 - Electronically Received Articles
 - Checked Out Items
 - Cancelled Requests
 - History Requests
 - All Requests
 - Notifications 
- **Tools**
 - Change User Information
 - Change Accounts
 - Change Password
- **About ILLiad**

Email Notifications

Subject	Sent
Item Really Overdue	3/8/2016 2:17:08 PM
Item Really Overdue	3/8/2016 2:17:08 PM
Item Really Overdue	3/8/2016 2:17:08 PM
Item Really Overdue	3/8/2016 2:17:08 PM
Item Really Overdue	3/8/2016 2:17:08 PM
Item Really Overdue	3/8/2016 2:01:08 PM
Item Really Overdue	3/8/2016 1:55:50 PM
Item Really Overdue	3/8/2016 1:51:19 PM
Item Really Overdue	3/8/2016 1:47:32 PM
Item Really Overdue	3/8/2016 1:43:23 PM
Item Really Overdue	3/8/2016 1:39:11 PM
Item Really Overdue	3/8/2016 1:35:20 PM
Automated Interlibrary Loan Notification	3/8/2016 11:21:22 AM
Automated Interlibrary Loan Notification	3/8/2016 11:12:47 AM
Item Really Overdue	2/16/2016 9:02:04 AM
Requested Item Delivered Electronically	2/10/2016 11:00:16 AM
Requested Item Delivered Electronically	2/10/2016 9:26:31 AM
Automated Interlibrary Loan Notification	11/4/2015 9:46:04 AM
Automated Interlibrary Loan Notification	11/4/2015 8:55:37 AM
Requested article has been mailed	9/11/2015 1:30:27 PM

SMS Notifications

Transaction Number	Sent	Message
995	3/8/2016 2:17:08 PM	testing sms really overdue
994	3/8/2016 2:17:08 PM	testing sms really overdue
993	3/8/2016 2:17:08 PM	testing sms really overdue
992	3/8/2016 2:17:08 PM	testing sms really overdue
960	3/8/2016 2:17:08 PM	testing sms really overdue
1397	3/8/2016 2:01:08 PM	testing sms really overdue
1397	3/8/2016 1:55:50 PM	testing sms really overdue
1397	3/8/2016 1:51:19 PM	testing sms really overdue
1397	3/8/2016 1:47:32 PM	testing sms really overdue
1397	3/8/2016 1:43:23 PM	testing sms really overdue
1397	3/8/2016 1:39:11 PM	testing sms really overdue
1397	3/8/2016 11:21:22 AM	Your request has been cancelled: Avail - Stacks. See Notes. Title: atlas shrugged Author: ayn rand

What Changes Are There In The Patron Record?

- In the ILLiad Client you will see:
 - Notification Method has changed from Email to Electronic
 - Mail and Phone are still available
 - There are checkboxes for Email Notifications and SMS Notifications



Home

Change
PasswordPrint
UserLogin
to Web

Borrowing

Document
Delivery

Cleared



Not Cleared



Blocked



Disavowed

User

Add Request

Cleared Status

User Information

Requests

Accounts

Notifications

Details

User Name	maxie	Status	Faculty	Email Address	jbrunswick@atlas-sys.com	Expiration Date	3/18/2011
Last Name	brunswick	Department	Art	Phone	555-1212	Request Limit	
First Name	maxwell	Organization		Mobile Phone	6143523151	ILLiad Authentication	<input checked="" type="checkbox"/>
ID	123456789	Site		Fax			
Number		Authorized Users		Location	ILL Office		

Delivery Methods

Delivery Method Mail to Address Loan Delivery Method Hold for Pickup Electronic Delivery Yes

Notification Preferences

Notification Method Electronic

Local/Mailing Address

Other/Notification Address

Address	244 Clearfield Ave.		
	Suite #407		
City	Virginia Beach		
State	VA	Zip	23451
Country			

Email Notifications

- Account Cleared
- Password Reset
- Item Pickup
- Item Shipped
- Electronic Delivery
- Overdue
- Cancelled
- Other

SMS Notifications

- Account Cleared
- Password Reset
- Item Pickup
- Item Shipped
- Electronic Delivery
- Overdue
- Cancelled
- Other

Note

Date

Added By

Documentation

- ILLiad 8.6:
 - Table of Contents/Email/Email Templates
 - Table of Contents/Text Notifications

Questions?