

ILLiad as Power Tool

THE ILLIAD TOOL BOX

Print Templates

- Modify layout and page design
- Add/edit fields and labels
 - Filter and customize **printed text** on a template based on information present in the request
- Customize additional templates to print based in request information
- <https://support.atlas-sys.com/hc/en-us/sections/360002504414-Printing>

Email Routing & Custom Queues

- Create email templates for common situations
- Update request status after sending email
- Remove from routine workflow with a custom queue
- <https://support.atlas-sys.com/hc/en-us/articles/360011808034-Email-Routing>

Routing Rules

- Update request status automatically to alternate status based on information present in the request
- Create custom queue to hold or flag requests
- Does not affect static requests
- Only one rule works per update
- <https://support.atlas-sys.com/hc/en-us/sections/360002513073-Routing>

Addons

- Widgets installed to perform custom tasks
- Work within Client or on Server
- Commonly used for searching external sources such as Google Scholar
- <https://atlas-sys.atlassian.net/wiki/spaces/ILLiadAddons/overview>
- <https://atlas-sys.atlassian.net/wiki/spaces/ILLiadAddons/pages/3149543/ILLiad%2BAddon%2BDirectory>

Web Customization

- Add branding
- Edit/remove fields and menu options
- Add status specific pages to present custom options to patrons of a particular status
- <https://support.atlas-sys.com/hc/en-us/sections/360002516874-Web-Page-Customizations>

Custom Searching

- Search across various tables including Transactions, Lender Addresses, Users, & Tracking
- Export searches to Excel for further manipulation
- <https://support.atlas-sys.com/hc/en-us/articles/360011911293-Starting-a-Custom-Search>

PUTTING THE TOOLS TO WORK

Workflow: Faculty Delivery

- Print status on pull slips
- Routing by Faculty status to custom queue
- Mail to Address workflow
- Faculty Specific Web Pages

Workflow: Offsite Retrieval

- Routing temporary hold
- Place call for item with catalog Addon
- Send email to branch for lending request

Workflow: Accessibility Services

- Modify web pages to present new fulfillment options
- Route to custom queue for special handling

Workflow: Purchase on Demand

- Enable custom field to indicate request for purchase
- Addon for fulfillment searching
- Email routing to forward to collection development

Finding Turn-Around Time for a Custom Workflow

- Create custom search
- Export and use Excel tools for turn around time evaluation

ILLIAD 9.1 PREVIEW AND ILLIAD ROAD MAP

- ILLiad Road Map
 - <https://www.atlas-sys.com/illiad-roadmap>
- ILLiad Community Forum
 - <https://support.atlas-sys.com/hc/en-us/community/topics/115000191628-ILLiad-Best-Practices>
- ILLiad User Voice (Enhancements)
 - <https://uservoice.atlas-sys.com/forums/581665-illiad-ideas>