

ILLiad as Power Tool

Atlas Webinar

Agenda

- ILLiad Tool Box
 - Print Templates
 - Email Routing
 - System Routing/Routing Rules
 - Addons
 - Web Customization
 - Custom Searching
- Putting the Tools to Work
 - Faculty Delivery
 - Offsite Retrieval
 - Accessibility Services
 - Purchase on Demand

ILLiad Tool Box

ILLiad as Power Tool

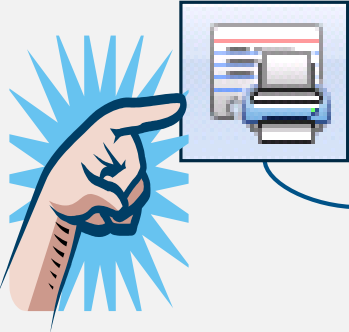


Print Templates

ILLiad as Power Tool



ILLiad Print Process



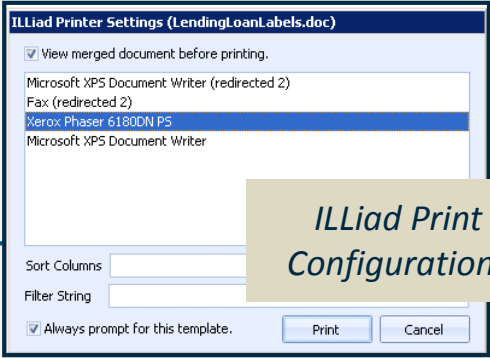
Request Data Export

ILLiad links request data with queue status

Data Source File in Excel

ILLiad triggers Word template according to Customization Manager Settings

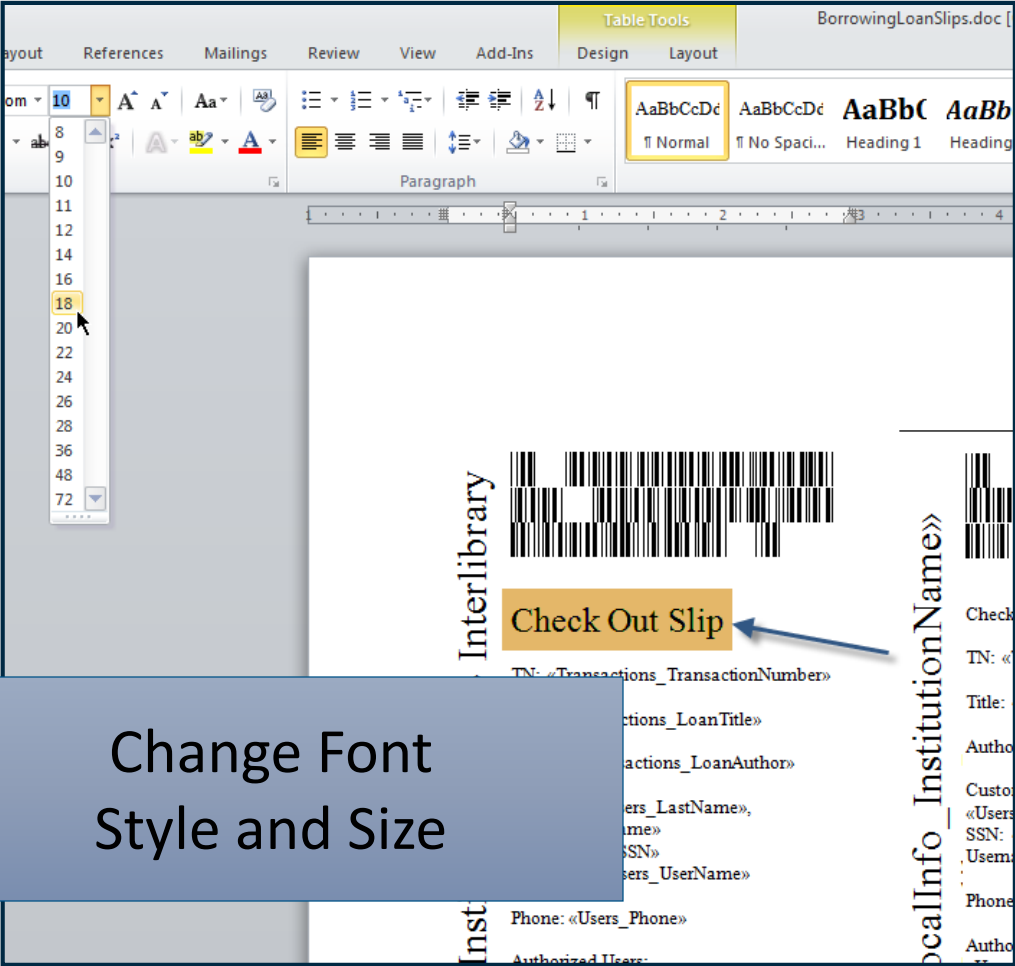
Print Templates in Word



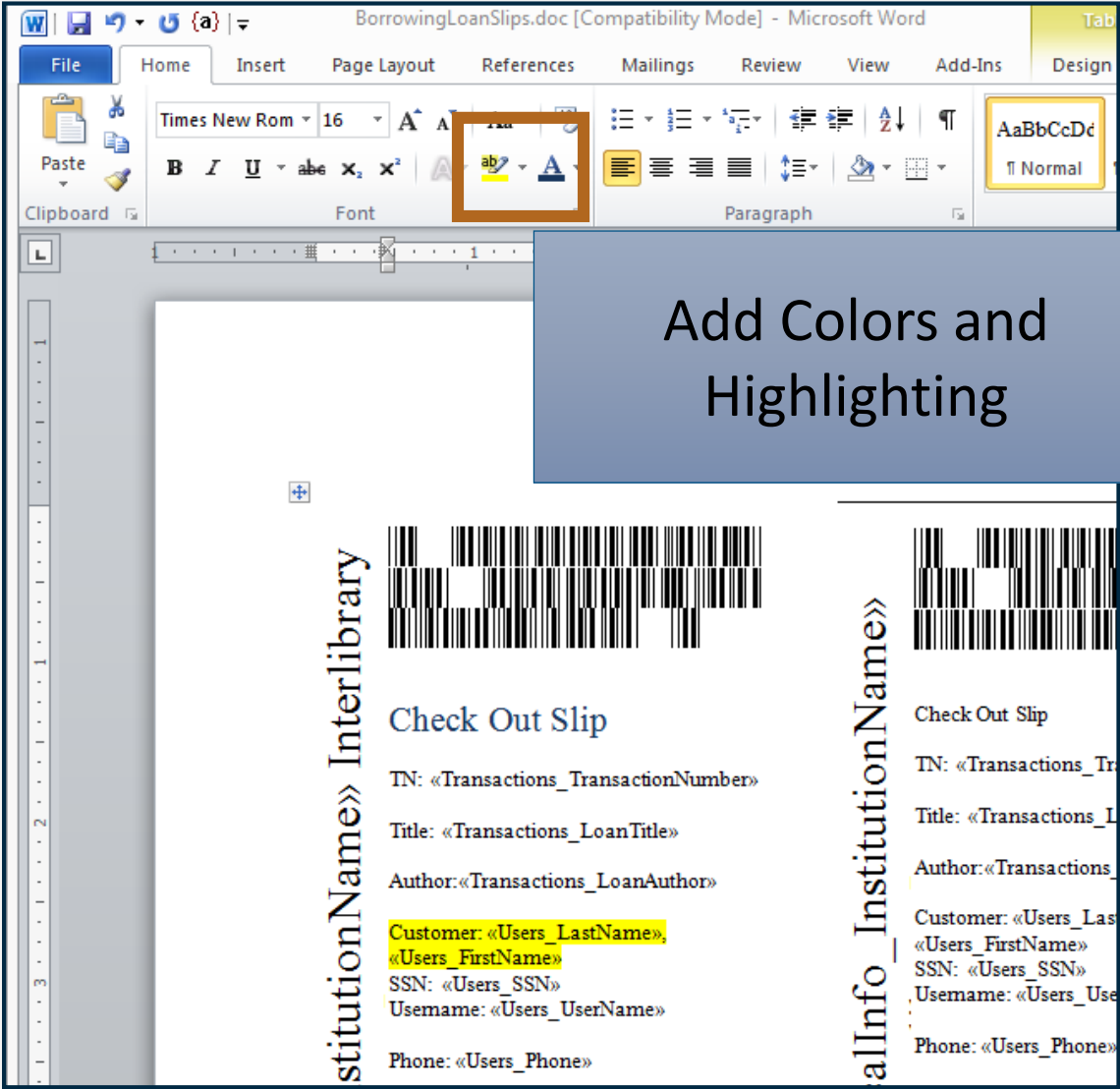
ILLiad Print Configurations



Page Design



Change Font Style and Size




Add Colors and Highlighting

Page Desgin

 Johnson County
Library

DO NOT REMOVE THIS LABEL


722

Sor	Sp
------------	-----------

Pick Up: ILL

DUE DATE: 88295733

Title: Treasures for the Christmas tree
: 101 festive ornaments to make & enjoy
Author: Taylor, Carol

\$200 default replacement cost
Actual costs will vary significantly
This item borrowed from the Johnson County Library
Interlibrary Loan department (913-826-4600)

Add Graphics

Add Tables and Columns

Transaction Number: LENDING – LOAN ()



Please Return This Form with Material

Call Number:

Location:

Title:

Author:

Return this item to:

/ILL Dept.

Phone: | Fax:

Email:

Borrowing Library Information:

ILL Number:



Due Date: | Renewals:

Loaned to: (from)

Pieces: 1

Shipping Label

From:

/ILL Dept.

Ship to:

Transaction Number: LENDING – LOAN ()



Please Return This Form with Material

Call Number:

Location:

Title:

Author:

Return this item to:

/ILL Dept.

Phone: | Fax:

Email:

Borrowing Library Information:

ILL Number:



Due Date: | Renewals:

Loaned to: (from)

Pieces: 1

Shipping Label

From:

/ILL Dept.

Ship to:

Transaction Number: LENDING – LOAN ()



Please Return This Form with Material

Call Number:

Location:

Title:

Author:

Return this item to:

/ILL Dept.

Phone: | Fax:

Email:

Borrowing Library Information:

ILL Number:



Due Date: | Renewals:

Loaned to: (from)

Pieces: 1

Shipping Label

From:

/ILL Dept.

Ship to:

Hobart W. Smith

Lending Shipping Slip example

<http://idsproject.org/usergroups/groupprinttemplates.aspx>

Odyssey: 137.48.70.8
Article Exchange (PDFs only):
unoill@mail.unomaha.edu

AE: (1) Drop File (2) Save icon (3) Email (4) Mark Item Found

Supplied by
Nazareth College

nazill@naz.edu

Wednesday, March 13, 2013

XNC TN:348920



ILL Number: 91797071



NBU TN# 278155



Lender String:

*XNC,CAU,ZYU,ZYU,MRY

Patron: A

Charge: \$0.00 **Billed via:** IFM

The Canadian Art Therapy Association journal.

(NAZ Call#/Location: No Call Number, Periodicals Paper: v. 20 #2- Fall 2007-)

Volume: 20 **Issue:** 1

Date: 3 2007

Pages: 36-38

Article Author:

Article Title: Lavergne, ; Review of 'Short-term play therapy for children (second edition)'.

Warning of Copyright

Notice: This material may be protected by copyright law (Title 17 U.S. Code)

Mailing Address:

**University of Nebraska at Omaha
Dr.C.C. and Mabel L. Criss Library-
ILL**

**6001 Dodge St
Omaha NE 68182-0609**

Nazareth College

Lending Article Slip

<http://idsproject.org/usergroups/groupprinttemplates.aspx>

Add Remove Fields

The screenshot shows the Microsoft Word interface in Compatibility Mode, specifically the Mailings ribbon. The 'Insert Merge Field' button is highlighted with a red box, and an orange arrow points from it to the 'Insert Merge Field' dialog box. The dialog box is open to the 'Database Fields' tab and lists various fields. The 'Preview Results' button on the ribbon is also highlighted with a red box. The background shows a mail merge document with three columns of text and barcodes.

Mailings Ribbon:

- Insert Merge Field (highlighted)
- Match Fields
- Update Labels
- Preview Results (highlighted)
- Find Recipient
- Check for Errors
- Finish & Merge

Insert Merge Field Dialog Box:

- Insert: Address Fields Database Fields
- Fields:
- DeliveryMethod
- Web
- Transactions_TransactionNumber
- Transactions_Username
- Transactions_RequestType
- Transactions_LoanAuthor
- Transactions_LoanTitle
- Transactions_LoanPublisher
- Transactions_LoanPlace
- Transactions_LoanDate
- Transactions_LoanEdition
- Transactions_PhotoJournalTitle
- Transactions_PhotoJournalVolume
- Transactions_PhotoJournalIssue
- Transactions_PhotoJournalMonth

Document Content:

Interlibrary
tionName»

Check Out Slip
TN: «Transactions_TransactionNumber»
Title: «Transactions_LoanTitle»
Author:«Transactions_LoanAuthor»
Customer: «Users_LastName»,
«Users_FirstName»
SSN: «Users_SSN»
Username: «Users_UserName»

Info_InstitutionName»

Check Out Slip
TN: «Transactions_TransactionNumber»
Title: «Transactions_LoanTitle»
Author:«Transactions_LoanAuthor»
Customer: «Users_LastName»,
«Users_FirstName»
SSN: «Users_SSN»
Username: «Users_UserName»

Info_InstitutionName»

Check Out Slip
TN: «Transactions_TransactionNumber»
Title: «Transactions_LoanTitle»
Author:«Transactions_LoanAuthor»
Customer: «Users_LastName»,
«Users_FirstName»
SSN: «Users_SSN»
Username: «Users_UserName»
Phone: «Users_Phone»

Content Editing

The image shows a Microsoft Word window with the 'Mailings' ribbon selected. The 'Rules' dropdown menu is open, showing options like 'Ask...', 'Fill-in...', 'If...Then...Else...', 'Merge Record #', 'Merge Sequence #', 'Next Record', 'Next Record If...', 'Set Bo...', and 'Skip R...'. The 'If...Then...Else...' option is highlighted. In the foreground, the 'Insert Word Field: IF' dialog box is open. It has the following fields:

- IF**: A text box for the condition.
- Field name:** A dropdown menu with 'Users_Status' selected.
- Comparison:** A dropdown menu with 'Equal to' selected.
- Compare to:** A text box with 'Faculty' entered.
- Insert this text:** A text box with 'OFFICE DELIVERY' entered.
- Otherwise insert this text:** An empty text box.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

The background document is a mail merge form for 'University of New Mexico ILL'. The visible text includes:

HALL, DON
Faculty Delivery
83B Winston Hall

University of New Mexico ILL

TN: 1793

Title: Who controls the Internet?:
illusions of a borderless world /
Author: Goldsmith, Jack L.

Customer: Hall, Don
Username: dhall

Content Edits: If . . . Then . . . Else

Insert Word Field: IF

IF _____

Field name: Comparison: Compare to:

Insert this text:

Otherwise insert this text:

Call #: { MERGEFIELD ALLNUMBER }

Location: { MERGEFIELD LOCATION }

Patron: { MERGEFIELD PATRON }

Journal Title: { MERGEFIELD PHOTOJOURN }

Volume: { MERGEFIELD PHOTOJOU_1 } Issue: { MERGEFIELD PHOTOJOU_2 }

Month/Year: { MERGEFIELD PHOTOJOU_3 } { MERGEFIELD PHOTOJOU_4 } Pages: { MERGEFIELD PHOTOJOU_5 }

Article Author: { MERGEFIELD PHOTOARTIC }

Article Title: { MERGEFIELD PHOTOART_1 }

Print: { MERGEFIELD CITEDIN }

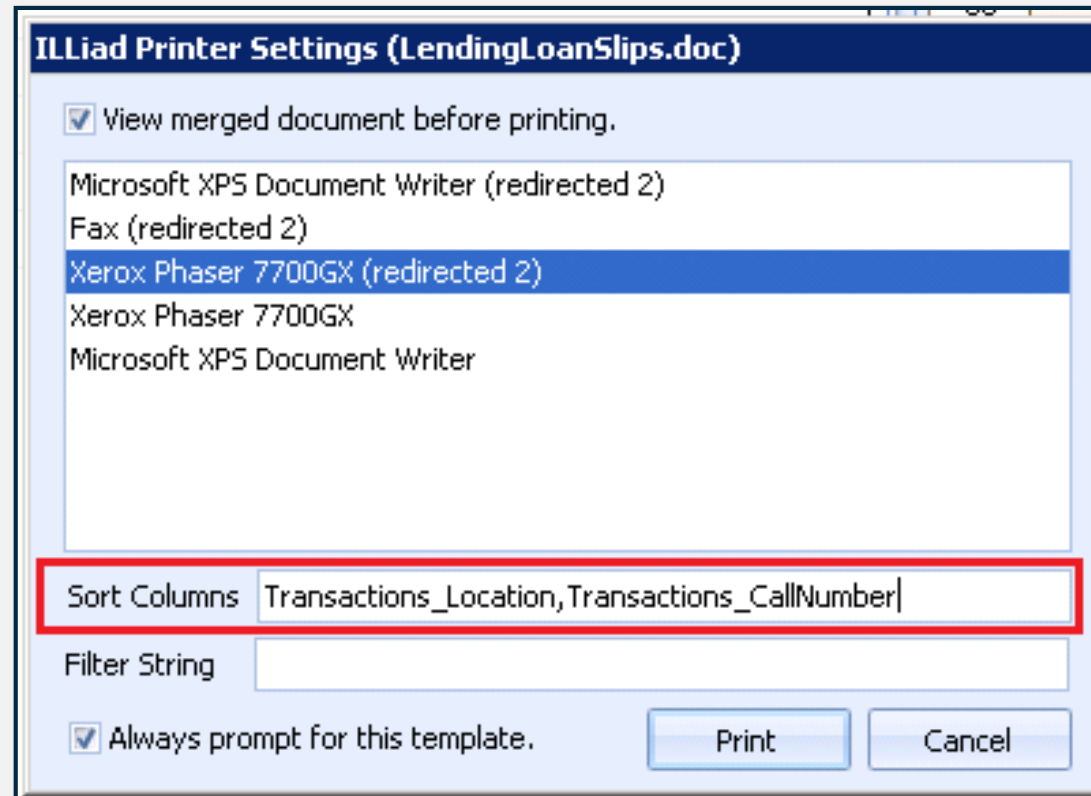
```
{ IF { MERGEFIELD ODYSSEYIP } <> ""  
  "ODYSSEY ENABLED" "We send our  
documents electronically using Odyssey.  
ILLiad libraries can enable Odyssey for  
receiving documents seamlessly. Non-  
ILLiad libraries can download Odyssey  
stand alone for FREE. Check it out at:  
http://www.atlas-sys.com/Odyssey.html" }
```

```
{ IF { MERGEFIELD BILLINGCAT } = "Billing  
Exempt" "Billing Exempt" "Charge  
Maxcost: { MERGEFIELD MAXCOST }" }
```

Shipping Address:
{ MERGEFIELD LIBRARYNAM }

Sorting

- Print jobs can be sorted
 - Print in order by Location and Call Number



Filtering

Print Configurations

Home

Save Cancel

Options

Multiple templates assigned in the Customization Manager
Filtered by content in the request in Print Configurations

Template	Printer	Filter	Sort Columns	...	Pr...
BorrowingArticleLabels.doc	Xerox Phaser 6180DN PS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BorrowingOverdueLetter1.doc	Xerox Phaser 6180DN PS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BorrowingOverdueReminderLetter.doc	Xerox Phaser 6180DN PS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LendingArticleShippingLabels.doc	Xerox Phaser 6180DN PS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BorrowingNotify.doc	Xerox Phaser 6180DN PS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CourierLabels.docx	Xerox Phaser 6180DN PS	LenderAddresses_DefaultShippingMethodLoan = 'COKAMO'		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BorrowingLoanLabels.docx	Xerox Phaser 6180DN PS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BorrowingLoanSlips.docx	Xerox Phaser 6180DN PS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BorrowingLoanLabelsMEDIA.docx	Xerox Phaser 6180DN PS	Transactions_RestrictedUse = "Yes"		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BorrowingLoanLabelsLIBRARYUSEONLY....	Xerox Phaser 6180DN PS	Transactions_LibraryUseOnly = "Yes"		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BorrowingReturnAddressLabels.docx	Xerox Phaser 6180DN PS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BorrowingReturnAddressLabelsUPS.docx	Xerox Phaser 6180DN PS	LenderAddresses_PriorityShipping = "Yes"		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LendingArticleSlips.docx	Xerox Phaser 6180DN PS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LendingLoanLabels.docx	Xerox Phaser 6180DN PS	Transactions_ItemNumber = "m"		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LendingLoanSlips.docx	Xerox Phaser 6180DN PS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

ILL

HALL, DON



TN: 1793

Title: *Who controls the Internet? :
illusions of a borderless world /*
Author: Goldsmith, Jack L.

Customer: Hall, Don
Username: dhall

Signature _____
Date _____

University

PLEASE DO NOT REMOVE THIS BAND

TN:



«USERS_LASTNAME»,
«USERS_FIRSTNAME» -
«Users_UserName»

TN: «Transactions_TransactionNumber»
Lending Library:
«Transactions_LendingLibrary»
Title: «Transactions_LoanTitle»
Author: «Transactions_LoanAuthor»
ILL: «Transactions_ILLNumber»

Due Date: «Transactions_DueDate»
Pieces: «Transactions_Pieces» **1**
(Date subject to change if recalled by lending library)

Late fees begin at \$25 non-refundable

This material is for LIBRARY USE ONLY

- Materials may not leave the building.
- Do NOT desensitize.
- Return materials to the Service Desk before leaving the library.
- Check the box below when finished with the material and ILL will return it to the lending library.

Yes, I am finished with this material and it may be returned.

For Staff Use Only

Special Instructions: «Transactions_Specials»



Hall, Don - dhall

TN: **1793** Lending Library: TRNAA
ILL: 167355058
Title: *Who controls the Internet? : illusions of a borderless world /*
Author: Goldsmith, Jack L.

Due Date: **3/26/2019** Pieces: **1**
(Date subject to change if recalled by lending library)

Please **DO NOT** remove this label
Please return ILL books to Zimmerman's Service desk
DO NOT leave in book drop

Email Routing & Custom Queues

ILLiad as Power Tool



Email Routing

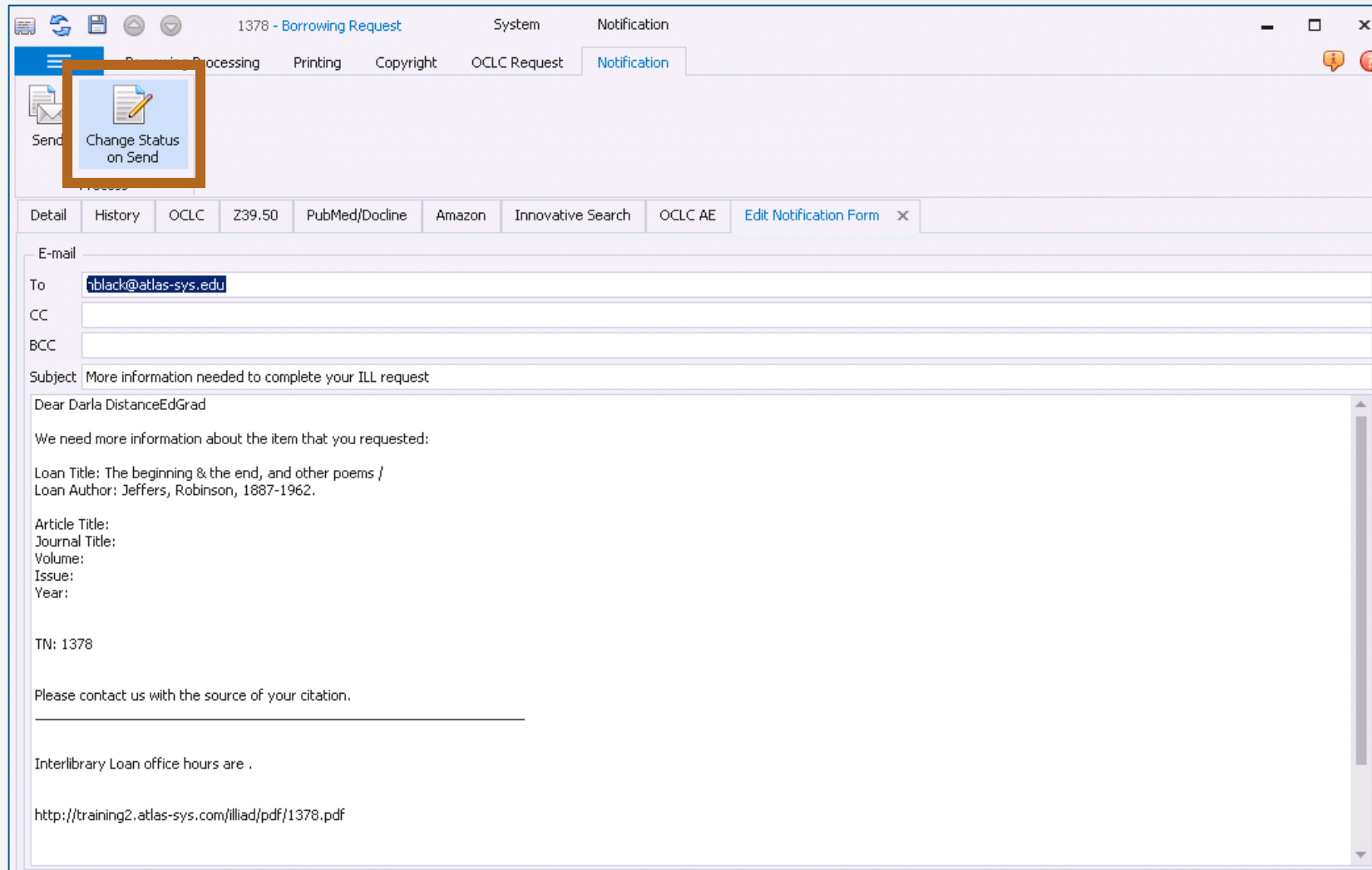
- Create email templates for common situations
- Update request status after sending email

The screenshot shows a web application interface for managing borrowing requests. The main window is titled "System 1378 - Borrowing Request". The top navigation bar includes tabs for "Borrowing Processing", "Printing", "Copyright", and "OCLC Request". Below this is a toolbar with various action buttons: "Cancel Request", "Request Sent", "Route", "Route To Document Delivery", "Add Flag", "Remove Flag", "Clone to Current User", "Clone to Another User", "Policies Directory", "Billing", and "View".

The main content area is divided into several sections. The "General Request Information" section contains fields for "Transaction Number" (1378), "Username" (darlad), "Transaction Date" (2/20/2019 12:15 PM), "Delivery Method" (Mail to Address), "Service Level" (Regular), "Billing Account", "Article" (radio button), "Loan" (radio button), "Wanted By", "Not Wanted After" (01/23/2014), "Site", "Shipping Options", and "Doc Type" (Book). Below this is the "Article Info" section, which includes fields for "Title" (The beginning & the end, and other poems /), "Author" (Jeffers, Robinson, 1887-1962.), "Publisher" (Random House), "Place" (New York), "Date" (1963), "Edition", and "Original Loan Author" (Jeffers, Robinson). To the right of the "Article Info" section is a list of checkboxes for various options: "Accept Alternate Edition", "Accept Non English", "Allow Copies?", "Copyright Already Paid?", "Allow Renewals?", "Library Use Only?", "Replacement Pages?", and "Priority Shipping".

The "Send Notification" dropdown menu is open, displaying a list of email templates. The templates include: "Additional Fee Inquiry", "ALA Request", "Full Text Available--Link", "In Library Use", "International Request", "Int'l Request-Notify Patron", "Loan Pick Up Reminder", "Loan Recall", "Locally Held", "Locally Held--Microfilm", "Occams Reader", "Overdue Account Charged", "Problem Request--Patron", "Problem Request--Reference", "Purchase Request", "Purchase Request--Patron Notify", "STRI AE", and "Test to Change Process Type".

Borrowing Example—Problem Request



1378 - Borrowing Request System Notification

Processing Printing Copyright OCLC Request Notification

Send Change Status on Send

Detail History OCLC Z39.50 PubMed/Docline Amazon Innovative Search OCLC AE Edit Notification Form x

E-mail

To: rlblack@atlas-sys.edu

CC:

BCC:

Subject: More information needed to complete your ILL request

Dear Darla DistanceEdGrad

We need more information about the item that you requested:

Loan Title: The beginning & the end, and other poems /
Loan Author: Jeffers, Robinson, 1887-1962.

Article Title:
Journal Title:
Volume:
Issue:
Year:

TN: 1378

Please contact us with the source of your citation.

Interlibrary Loan office hours are .

<http://training2.atlas-sys.com/illiad/pdf/1378.pdf>

Custom Queues

The screenshot displays the ILLiad Client interface. At the top, there are navigation tabs for Home, Borrowing, Document Delivery, Lending, and System. Below these are search fields for Number, User Information, and Citation Information, all set to 'ALL'. There are also search fields for Username, Name, and ID, and Symbol, Name, and Address. The main content area shows a list of requests under the heading 'Requests (1363 items)'. The list is filtered by 'Borrowing' and includes various request statuses. Two items are highlighted with a red box: 'Awaiting Patron Response' (count 2) and 'Awaiting Purchase Review' (count 6).

Request Status	Count
Additional Fee Inquiry	1
Awaiting ALA Request Processing	2
Awaiting Citation Verification	4
Awaiting Copyright Clearance	5
Awaiting Customer Contact	3
Awaiting Denied Renewal Processing	2
Awaiting Ebook Purchase Review	1
Awaiting Odyssey Processing	3
Awaiting Patron Response	2
Awaiting Purchase Review	6
Awaiting Recalled Processing	3
Awaiting Reference Response	1
Awaiting Renewal OK Processing	3
Awaiting Reply--Patron	1
Awaiting Reply--Reference	1
Awaiting Request Processing	13
Awaiting Return Label Printing	24
Awaiting RUSH ILL Processing	1
Awaiting RUSH Purchase Review	1
Awaiting Unfilled Processing	8

Routing Rules

ILLiad as Power Tool

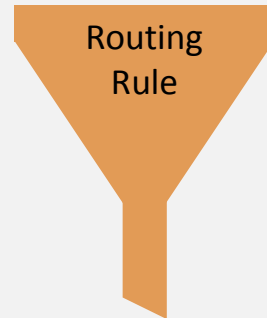
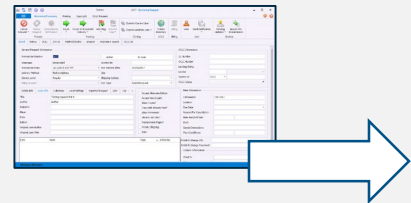


Routing Rules (System Routing)

- Allows the ILLiad system to do routine processing
 - Automatically updates requests from one status to another based on your designed parameters
- Add or Skip Steps base on information in the Transaction record, User record or Lender Address record
- Transaction history shows update by System

How DO they work?

- Request data is compared to “filter” in routing rule
- Match YES
 - Request auto-updated to new status
- Match NO
 - Request moves to typical update status



Awaiting Request Processing



Awaiting Custom Processing

System 2477 - Borrowing Re

Borrowing Processing Printing Copyright OCLC Request

Cancel Request Renew Request Send Delivery Notification Route Route To Document Delivery Add Flag Remove Flag Clone to Current Use Clone to Another Use

Process Routing Cloning

Detail History OCLC Z39.50 PubMed/Docline Amazon Innovative Search OCLC AE

Tracking

Date Changed	Changed To	Changed By
1/11/2019 3:26 PM	Awaiting Request Processing	hblack
1/11/2019 3:26 PM	Awaiting Distance Ed Clearance	System
1/11/2019 3:27 PM	Routed from Document Delivery to Borrowi	hblack
1/11/2019 3:27 PM	Awaiting Request Processing	hblack

History

Date Changed	Entry	Username
3/11/2016 8:59 AM	Updated status to Cancelled by ILL Staff	hblack
1/11/2019 3:26 PM	Updated status to Awaiting Request Processing	hblack
1/11/2019 3:26 PM	Updated status to Awaiting Distance Ed Clearance	System
1/11/2019 3:27 PM	Updated status to Routed from Document Delivery ...	hblack

Resubmission

Routing Rule Use

- Some practical uses
 - Routing Distance Education student requests for special processing
 - Routing Document Delivery requests from Borrowing to Document Delivery module
 - Routing requests for specific document types to special queues
 - Skipping print jobs for libraries with certain values in the Lender Address record

Addons

ILLiad as Power Tool



Addons

- Widgets installed to perform custom tasks
- Work within Client or on Server
- Commonly used for searching external sources such as Google Scholar

Default Addons Installed

- Amazon Book Searches
- Google Search
- Google Scholar Search
- Shipment Tracking

The screenshot shows the 'Main - ILLiad Client' interface with the 'System' tab selected. The 'Manage Addons' window is open, displaying a table of installed addons. The 'Manage Addons' icon in the top navigation bar is highlighted with a red box. The 'Manage Addons' window title bar is also highlighted with a red box. The table below lists the installed addons and their settings.

Vendor	Version	Active	Description
Systems, Inc.	1.1	<input checked="" type="checkbox"/>	Performs an Amazon search for the LoanTitle for loans.
Reprints Desk	1.0	<input checked="" type="checkbox"/>	The A-Z Document Delivery Collection addon by Reprints Desk (www.reprintsdesk.com) enables ordering of full-text research papers that are available at reduced copyright royalty rates and in native PDF format. The addon facilitates price-by-article lookups, browsing through a growing list of participating publishers and publications that can be sorted by copyright price ranges, and easy article ordering. Document delivery fulfillment and customer support are available 24/7.
Systems, Inc.	1.1	<input type="checkbox"/>	Facilitates ordering materials using the British Librar's BL on Demand service and using OCLC IFM for payment.
Project/Atlas Sy...	2.1	<input checked="" type="checkbox"/>	Performs a price lookup of the article using the CCC GetItNow Service.
Systems, Inc.	1.0.0	<input checked="" type="checkbox"/>	Copies information about an item into the windows clipboard
Project	1.65	<input type="checkbox"/>	This Addon does an ISBN or Title search; ISBN will be run if one is available.

Setting Name	Value	Type	Description
AutoSearch	<input checked="" type="checkbox"/>	boolean	Defines whether the search should be automatically performed when the form opens.
PriceField	CitedTitle	string	Defines what field in the transactions table the price should be saved to.

Additional details for the Amazon Book Searches addon:

- Version: 1.1
- Active: Yes No
- Description: Performs an Amazon search for the LoanTitle for loans.

Navigation menu items:

- Awaiting RUSH ILL Processin
- Awaiting RUSH Purchase Re
- Awaiting Unfilled Processing
- Awaiting User Verification
- Blocked Returns
- British Library Example
- Cancelled by Customer
- Cancelled by ILL Staff
- Check Notes
- Checked Out to Customer

hblack/MAIN

2953 - Borrowing Request System Script

Borrowing Processing Printing Copyright Reprints Desk OCLC Request **Google Scholar Search**

Back Forward Stop Refresh Search

Browser Google Scholar

Detail History OCLC Z39.50 PubMed/Docline Innovative Search OCLC AE **Google Scholar Search** Serials Solutions Search

☰ Gauge theory correlators from non-critical string theory 🔍

📌 Scholar YEAR ▾ ≡

Gauge theory correlators from non-critical string theory **[PDF] arxiv.org**

SS Gubser, IR Klebanov, AM Polyakov - Physics Letters B, 1998 - Elsevier

We suggest a means of obtaining certain Green's functions in 3+ 1-dimensional N= 4 supersymmetric Yang-Mills theory with a large number of colors via non-critical string theory. The non-critical string theory is related to critical string theory in anti-deSitter background. We introduce a boundary of the anti-deSitter space analogous to a cut-off on the Liouville coordinate of the two-dimensional string theory. Correlation functions of operators in the gauge theory are related to the dependence of the supergravity action on the boundary ...

☆ 99 Cited by 9351 Related articles All 13 versions

Showing the best result for this search. [See all results](#)

Client Addon

Server Addons - ILLiad Customization Manager (hblack)

Home Addons

New Update Export Save Delete Cancel Reset Settings

Manage

Customization Z39.50 Notification Templates Server Addons

Name	Author	Version	Active	Last Updated	Description
Electronic Delivery Reminder Addon	Atlas Systems, Inc.	1.0	Active	10/19/2016 12:58 PM	Send another Notification Email for electronic files (PDF) not viewed
ElecDelReminderAddon	Atlas Systems, Inc.	1.0	Active	10/19/2016 12:58 PM	Send another Notification Email for electronic files (PDF) not viewed
Loan-ArticleReminderAddon	Atlas Systems, Inc.	1.0	Inactive	10/19/2016 12:58 PM	Send another Notification Email for items not picked up
Twilio SMS Notifications Addon	Atlas Systems, Inc.	1.1.0	Active	10/19/2016 4:59 PM	Sends SMS Notifications using the Twilio API

Name	Setting Name	Value	Type	Description
Electronic Delivery Reminder Addon	EmailName	ElecDel Reminder	string	Name of the Email template to use.
Atlas Systems, Inc.	Days	5	string	Days before file will be removed from Delivered to Web status that Reminders should begin sending.
1.0	EmailSubject	Reminder of Item Delivered to view Online	string	E-Mail Subject line on Notification Reminder.
<input checked="" type="radio"/> Yes <input type="radio"/> No	Site	XYZ	string	Site code value that addon should run under, only used if SharedServerSupport is "Yes".

Name: Electronic Delivery Reminder Addon
 Author: Atlas Systems, Inc.
 Version: 1.0
 Active: Yes No
 Description: Send another Notification Email for electronic files (PDF) not viewed

Server Addon

Web Customization

ILLiad as Power Tool



Web Customization

- Add branding
- Edit/remove fields and menu options
- Add status specific pages to present custom options to patrons of a particular status



City of
Hope.

Lee Graff Medical and Scientific Library

Enter your user information below.

Then press the Logon to ILLiad button to continue.

ILLiad Logon

* Indicates required field

On March 1, 2019, new security updates will require returning users to reset their passwords.

* Username

* Password

Logon to ILLiad

Forgot username? Email library@coh.org for assistance.

Forgot Password?

First Time Users

FAQ

- [Logoff dhall](#)
- [Main Menu](#)
- [New Request](#)
 - ↳ [Purchase Request](#)
 - ↳ [Document Delivery](#)
 - ↳ [Media Request](#)
 - ↳ [Photocopy](#)
 - ↳ [Book for SWU](#)
 - ↳ [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](#)

Request Item for Purchase--Faculty

* Indicates required field

Enter information below and press the Submit Request button to send.

Our selectors will review your request to determine if your department budget allows purchase of this item.

* Author/Editors

* Title
Please do not abbreviate unless your citation is abbreviated

Publisher

Date of Publication

Edition

ISBN (International Standard Book Number)

If given will speed request processing

Is this item essential to your research or curriculum?

If this title is purchased, would you like for us to place it on hold for you?

If this title is *NOT* purchased, would you like to get it through Interlibrary Loan?

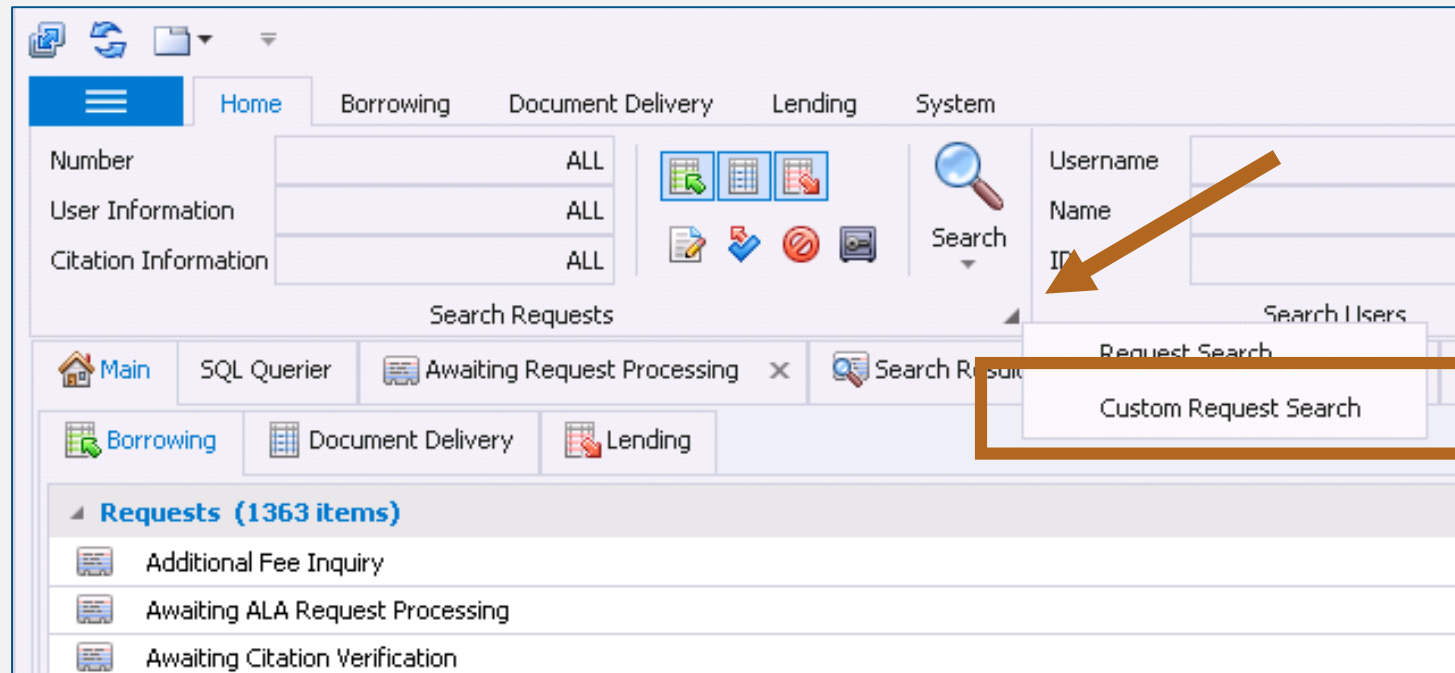
Custom Searching

ILLiad as Power Tool



Custom Searching

- Search across various tables including Transactions, Lender Addresses, Users, Tracking and History
- Export searches to Excel for further manipulation



Custom Search Custom Request Search - ILLiad Client

Home Borrowing Document Delivery Lending System Search

Search Description VCUAcquisitions

Parameters Search Process

Open Route Send Notification Add Flag Export

Main SQL Querier Awaiting Request Processing Search Results Distance Ed Loans Awaiting Unfilled Processing Custom Request Search

And +

- [Transactions.CreationDate] Is between 5/21/2010 and 5/20/2016
- [Transactions.ProcessType] Equals Borrowing
- [Transactions.RequestType] Equals Loan
- [Transactions.LoanDate] Is between 1990 and 2016
- [Users.Status] Equals Faculty

Drag a column header here to group by the

Loan Title

A delusion of Satan : the full story of ...

A Dictionary of American proverbs /

A mind at a time /

A voyage long and strange : rediscov...

Anything we love can be saved : a wri...

Bad land : an American romance /

Before the storm : Barry Goldwater a...

Botany illustrated : introduction to pla...

Cleopatra : a life /

Complete copyright : an everyday gui...

Daily life in Elizabethan England /

Dark emperor & other poems of the ni...

Glimn-Lacy, ... 2006 Springer Other - Unli... Faculty

Schiff, Stacy. 2010 Little Brow... Faculty 4/11/2019 ...

Russell, Ca... 2004 American Li... Faculty 4/11/2019 ...

Forgeng, J... 1995 Greenwood... Other - Unli... Faculty 3/27/2019 ...

Sidman, Jo... 2010 Houghton ... Other - Unli... Faculty 3/27/2019 ...

Putting the Tools to Work

ILLiad as Power Tool



Faculty Delivery

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

Borrowing Book Band Template

Add **Faculty Delivery**
and **Office Number** based on status

University of New Mexico ILL

HALL, DON
Faculty Delivery
83B Winston Hall



TN: 1793

Title: *Who controls the Internet? :
illusions of a borderless world /*
Author: Goldsmith, Jack L.

Customer: Hall, Don
Username: dhall

Route to Custom Queue

Detail History OCLC 239.50 PubMed/Docline Amazon Innovative Search OCLC AE

Tracking

Date Changed	Changed To	Changed By
4/23/2019 4:03 PM	Request Added Through Client	hblack
4/23/2019 4:03 PM	Awaiting Request Processing	hblack
4/23/2019 4:03 PM	Faculty Requests	hblack

History

Date Changed	Entry	Usernam
4/23/2019 4:02 PM	Request cloned from 222	hblack
4/23/2019 4:03 PM	Status changed to Request Added Through Client b...	hblack
4/23/2019 4:03 PM	Status changed to Awaiting Request Processing by ...	hblack
4/23/2019 4:03 PM	Status changed to Faculty Requests by hblack	hblack

Resubmission

ILL Number	ESP Num...	Lending String	System ID	Transaction...
------------	------------	----------------	-----------	----------------

Previous Requests

Faculty Requests

Notification History

E-Mail SMS

ID	Transactio...	Email Date
----	---------------	------------

RuleNo	60
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	u.Status = 'Faculty'
NewProcessType	Borrowing
NewTransactionStatus	Faculty Requests
RuleDescription	faculty loan requests to priority queue

Mail to Address Workflow

Loan Delivery Method = Mail to Address
Sends alternate delivery notification

The screenshot shows a web-based user management interface for a library. At the top, there is a navigation bar with a 'Home' button and a user profile 'dhall - User'. Below this is a toolbar with icons for 'Change Password', 'Print User', 'Logon to Web', 'Borrowing', 'Document Delivery', 'Cleared', 'Not Cleared', 'Blocked', and 'Disavowed'. The main content area is divided into tabs: 'User Information', 'Requests', 'Accounts', and 'Notifications'. The 'User Information' tab is active, showing a 'Details' section with fields for User Name (dhall), Last Name (Hall), First Name (Don), ID (203948), Status (Faculty), Department, Organization, Site, Email Address (dhall@ashiondx.com), Phone (879-298-2983), Mobile Phone, Fax, Expiration Date (7/7/2012), Request Limit, and Location (MAIN Library). Below this is the 'Delivery Methods' section, where 'Loan Delivery Method' is set to 'Mail to Address' (highlighted with a blue box and an orange arrow) and 'Electronic Delivery' is set to 'Yes'. The 'Notification Preferences' section is also visible, with 'Notification Method' set to 'Electronic'. Under 'Local/Mailing Address', the address is '456 County Rd 228', City is 'Windehame', State is 'NH', and Zip is '02983'. The 'Other/Notification Address' section is currently empty.

Faculty Specific Web Pages

ILLiad

Search

Active All

- Logoff dhall
- Main Menu
- New Request
 - Purchase Request
 - Document Delivery
 - Media Request
 - Photocopy
 - Book for SWU
 - 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

Office Delivery Request

* Indicates required field

Enter information below and press the Submit Request button to send.

Describe the item you want

* Author/Editors

* Title
Please do not abbreviate unless your citation is abbreviated

Publisher

Place of Publication

Date of Publication

Edition

ISBN (International Standard Book Number)
If given will speed request processing

OCLC or Docline UI Number

Will you accept the item in a language other than English?
If yes, specify acceptable languages in the notes field

Yes

Request Options only for Faculty

Offsite Retrieval

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

Email Branch for Lending Request

The screenshot shows a web application window titled "1127 - Lending Request". The interface includes a top navigation bar with "System" and "Email" tabs, and a sub-navigation bar with "Lending Processing", "OCLC", and "Email" buttons. A toolbar on the left contains "Send" and "Change Status on Send" buttons. Below the toolbar is a breadcrumb trail: "Detail" > "History" > "OCLC" > "Z39.50" > "PubMed/Docline" > "OCLC AE" > "Google Search" > "Edit Email Form". The main content area is titled "Email Editing" and contains the following fields:

- To:
- CC:
- Subject:

The email body text is as follows:

Please provide the following to Livvy Lending so it can be sent to a requesting library:

Call Number:
Location:

Loan Author: Johansen, Iris.
Loan Title: Quinn /

This request has been forwarded from ILL by hblack.
ILLiad Transaction Number: 1127

If you have any questions, contact us at:

E-Mail: Lender@atlas-sys.com
Phone: 970-985-3217

**Request Item from Remote Storage
and send to hold queue**

Catalog Addon for Request Hold

744 - Lending Request Script

Lending Processing Printing Cloning Odyssey Innovative Search

Back Forward Stop Refresh Search

Browser Innovative

Detail History Z39.50 PubMed/Docline OCLC Amazon OCLC AB Innovative Search

Prospector

New Search Advanced Search Print Help

News About Map Encore Home Help Topics

Start Over Add to Bag MARC Display Return to Browse Limit/Sort Search Another Search

TITLE =Nine Horses System Sorted Search

Limit search to available items

Record 2 of 3
Previous Record Next Record

Resources
Find More Resources
MOBIUS

Request this item

Library	Shelving Location	Electronic Link	Call Number and Holdings	Request Status
Alliance - CU Boulder	Norlin Library-Stacks		PS3553.047478 N45 2003	AVAILABLE

Copies

Description 120 pages ; 20 cm text/unmediated/volume/
Note "Poetry Book Society choice"--Cover
LC # PS3553.047478 N45 2003
ISBN 033041304X

Awaiting Unfilled Processing Lending

Custom Queue for Temporary Hold

The screenshot shows the 'Main - ILLiad Client' interface. At the top, there are navigation tabs: Home, Borrowing, Document Delivery, Lending, and System. Below these are search fields for 'Search Requests' and 'Search Users'. A table lists various request statuses with their counts:

Status	Count
Item Shipped Internationally	6
Awaiting Unfilled Processing	4
Awaiting Cancellation Review	10
Billed Item	3
Aeon Requests (4 items)	
Aeon Request Sending Failed	4
completed requests (896 items)	
Cancelled by ILL Staff	242
Request Finished	653
Cancelled via Lending Web	1
Requests (15 items)	
Awaiting Urgent Patient Care Processing	1
Awaiting Rush Request Processing	3
Awaiting RAPID Holdings Lookup	5
Called from Remote Storage	6

The 'Called from Remote Storage' status is highlighted with a red box. The total count at the bottom right is 1429.

The screenshot shows the '744 - Lending Request' interface. At the top, there are navigation tabs: Lending Processing, Printing, Cloning, and Odyssey. Below these are various action buttons: Cancel Request, Conditionalize Request, Mark Found, Mark Found Scan Now, Route, Add Flag, Remove Flag, Policies Directory, Billing, View, and Send N. A dropdown menu is open, showing a list of request statuses:

- Awaiting Lending Request Processing
- Awaiting Rush Request Processing
- Awaiting Conditional Request Processing
- Awaiting Renewal Request Processing
- Awaiting Stacks Searching
- In Stacks Searching
- Awaiting Lending Scanning
- Awaiting Shipping Label Printing
- In Shipping Label Print Queue
- Item Shipped
- Request Conditionalized
- Cancelled by ILL Staff
- Request Finished
- Awaiting EJournal Processing
- Awaiting ISO ILL Request Processing
- Awaiting RUSH Request Processing
- Billed Item
- Called from Remote Storage
- Crazy things that should never happen
- Digitization Requested

The 'Called from Remote Storage' status is highlighted with a red box. The background shows 'General Request Information' for Transaction Number 744, Username MAIN, Transaction Date 5/9/2016 12:37 AM, Delivery Method, Service Level Regular, and Billing Account.

Accessibility Services

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

Modified Loan Request Form

- Logoff atlas
- Main Menu
- New Request
 - Article
 - Book
 - Book Chapter
 - Conference Paper
 - Standards
 - Patent
 - Thesis
 - Microfilm
 - DVD/CD/Other Multimedia
- View
 - Outstanding Requests
 - Electronically Received Articles
 - Checked Out Items
 - Cancelled Requests
 - All Requests
 - Notifications
- Tools
 - Update Personal Information
- About ILLiad

Book Request

* Indicates required field

Enter information below and press the Submit Information button to send.

Describe the item you want

* Title
Please do not abbreviate unless your citation is abbreviated

* Author/Editors

Publisher

Place of Publication

Date of Publication

Edition

ISBN (International Standard Book Number)
If given will speed request processing

Call Number or DOI

OCLC Number

* Not Wanted After Date
(MM/DD/YYYY)

Will you accept the item in a language other than English? If yes, specify acceptable languages in the notes field.

Will you accept an alternate edition of this item?

If this item is requested from an international library, are you willing to pay the \$5 shipping fee?

HathiTrust Print Disability access requested

Notes
Put any information here that may help us find the item, as well as any other pertinent information.

Route Based on Accessibility Request

The screenshot shows a web-based interface for managing borrowing requests. The main area is divided into several sections:

- Process:** Includes buttons for Cancel Request, Renew Request, and Send Delivery Notification.
- Routing:** Includes buttons for Route, Route To Document Delivery, Add Flag, and Remove Flag.
- Cloning:** Includes buttons for Clone to Current User and Clone to Another User.
- User:** Includes buttons for View and Send Notification.

The **General Request Information** section contains the following data:

Transaction Number	1835	Article	Loan
Username	mcarr	Wanted By	
Transaction Date	4/23/2019 4:51 PM	Not Wanted After	08/27/2014
Delivery Method	Hold for Pickup	Site	
Service Level	Regular	Shipping Options	
Item Info 1	Yes	Doc Type	Book

The **Local Information** section contains the following data:

Original TN	108164332
Bib Number	50670595
Lending String	
Lender	
System ID	
OCLC Status	

The **Item Information** section contains the following data:

Call Number	
Location	
Due Date	
Reason For Cancellation	
Item Num/Ref Num	
ISxN	
Special Instructions	
Max Cost/Pieces	1

The **Article Info** section contains the following data:

Title	Persepolis /
Author	Satrapi, Marjane, 1969-
Publisher	Pantheon Books
Place	New York NY
Date	2003
Edition	1st American ed.
Original Loan Author	Satrapi, Marjane
Original Loan Title	Persepolis

The **Notes** section contains the following data:

Date	Note	Type	Added By
8/29/2013 12:13 PM	No special conditions (lendingCharges: 0)	Lender	System

The **Print Accessibility Requests** button is located at the bottom left of the interface.

RuleNo	127
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	t.ItemInfo1 = 'Yes'
NewProcessType	Borrowing
NewTransactionStatus	Print Accessibility Requests
RuleDescription	Accessibility Requests

Purchase on Demand

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

Custom Field to Indicate Purchase Request

- [Logoff dhall](#)
- [Main Menu](#)
- [New Request](#)
 - ↳ [Purchase Request](#)
 - ↳ [Document Delivery](#)
 - ↳ [Media Request](#)
 - ↳ [Photocopy](#)
 - ↳ [Book for SWU](#)
 - ↳ [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](#)

Request Item for Purchase—Faculty * Indicates required field

Enter information below and press the Submit Request button to send.
Our selectors will review your request to determine if your department budget allows purchase of this item.

* **Author/Editors**

* **Title**
Please do not abbreviate unless your citation is abbreviated

Publisher

Date of Publication

Edition

ISBN (International Standard Book Number)
If given will speed request processing

Is this item essential to your research or curriculum?

If this title is purchased, would you like for us to place it on hold for you?

If this title is *NOT* purchased, would you like to get it through Interlibrary Loan?

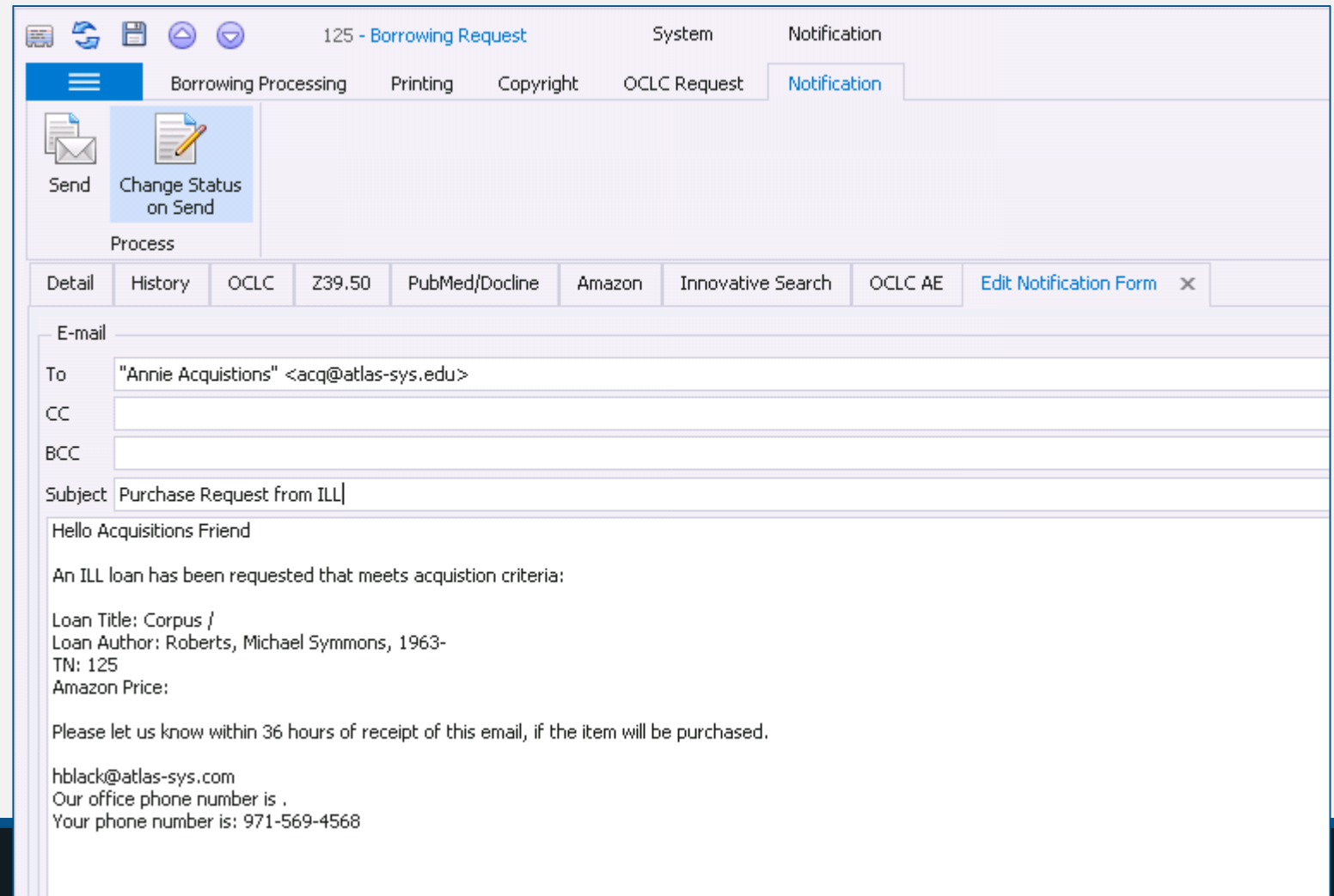
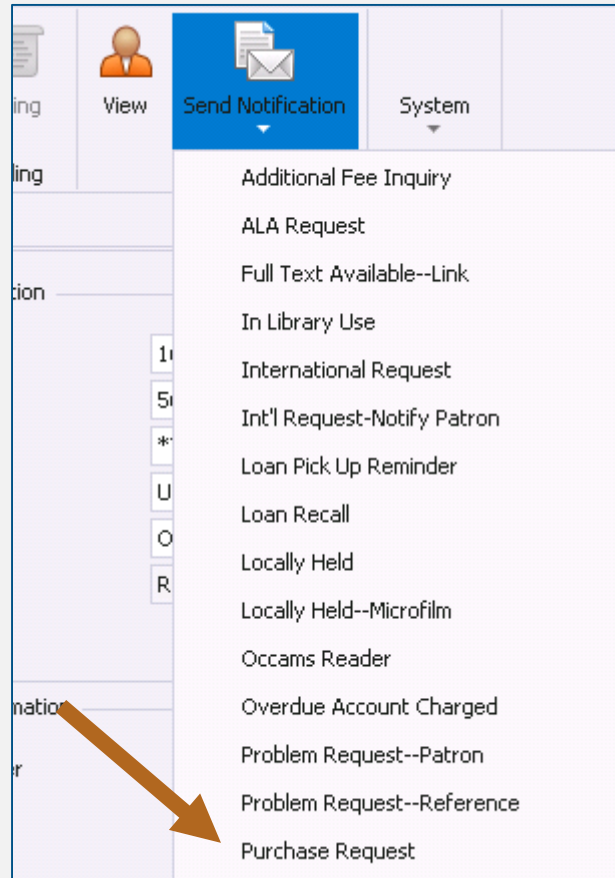
Notes
Please let us know why you think this item is important for our collection.

Fulfillment Addon

The screenshot displays a web browser window with the following elements:

- Title Bar:** 744 - Lending Request Script
- Menu Bar:** Lending Processing, Printing, Cloning, Odyssey, Amazon Books
- Navigation Bar:** Back, Forward, Stop, Refresh, Search, Import Price
- Browser Tabs:** Detail, History, Z39.50, PubMed/Docline, OCLC, Amazon (highlighted), OCLC AE, Innovative Search
- Amazon Page Header:** Amazon logo, search bar with "Books" dropdown and "Nine Horses" text, "Shop Deals of the Day", delivery location "Virginia ... 23456", and navigation links like "Account & Lists", "Orders", "Try Prime".
- Search Results:** "1-16 of over 20,000 results for Books: 'Nine Horses'"
- Product Listing:** "Nine Horses: Poems" by Billy Collins, published Oct 13, 2003. Price: \$12.93 (was \$16.00). Status: "Only 20 left in stock (more on the way)".
- Filters:** Amazon Prime, Eligible for Free Shipping, Department (Books, Poetry, American Poetry, etc.).
- Status Bar:** Awaiting Unfilled Processing (left), Lending (right)

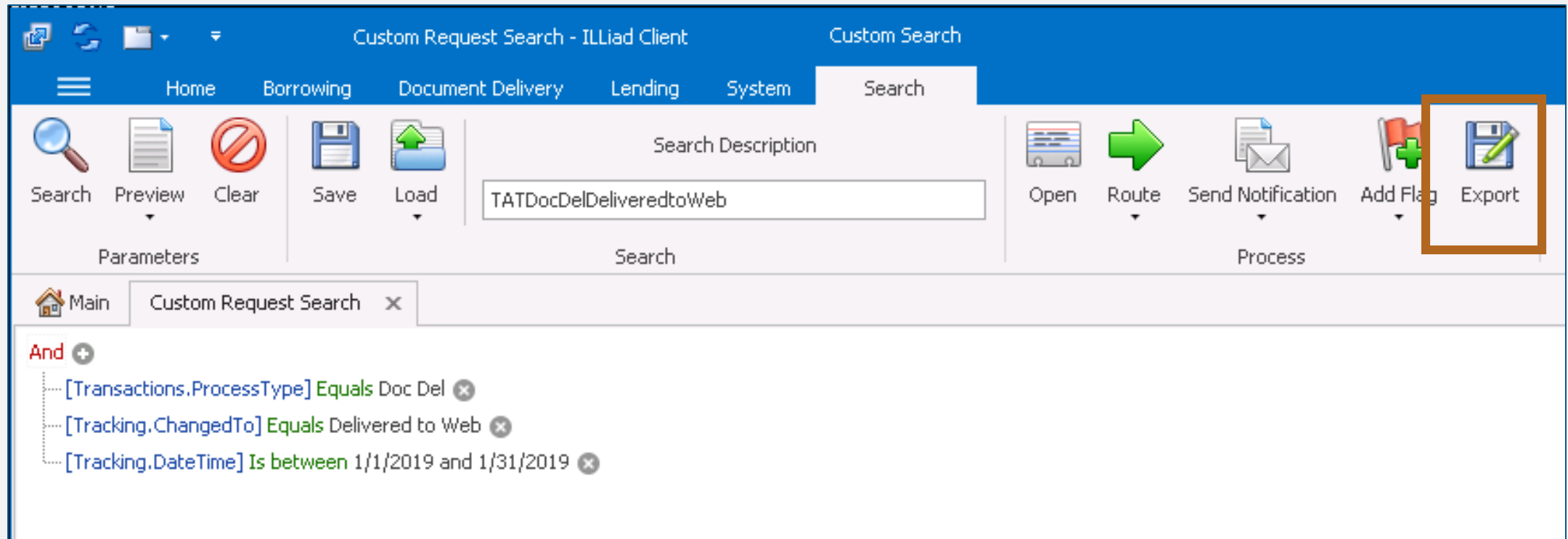
Email Routing to Collection Development



Turn Around Time

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

Create Custom Search & Export



The screenshot displays the ILLiad Client interface for creating a custom search. The title bar reads "Custom Request Search - ILLiad Client" and "Custom Search". The navigation menu includes "Home", "Borrowing", "Document Delivery", "Lending", "System", and "Search". The "Search" tab is active, showing a search description "TATDocDelDeliveredtoWeb" in a text box. The interface is divided into three main sections: "Parameters" (Search, Preview, Clear, Save, Load), "Search" (Search Description text box), and "Process" (Open, Route, Send Notification, Add Flag, Export). The "Export" button, represented by a floppy disk icon, is highlighted with a red box. Below the navigation bar, there are tabs for "Main" and "Custom Request Search". The search criteria are listed as follows:

- And +
- [Transactions.ProcessType] Equals Doc Del
- [Tracking.ChangedTo] Equals Delivered to Web
- [Tracking.DateTime] Is between 1/1/2019 and 1/31/2019

Additional Excel Manipulation

F938							=SUM(D938-E938)
	A	B	C	D	E	F	G
1	Transacti	System II	Transacti	Transaction Date	Creation Date	Turn Around Time	Request
953	266013	DOC	Delivered to	1/10/2019	1/9/2019	0.644166944	Article
954	266015	DOC	Delivered to	1/10/2019	1/9/2019	0.637703657	Article
955	266016	DOC	Delivered to	1/10/2019	1/9/2019	0.626748808	Article
956	266017	DOC	Delivered to	1/10/2019	1/9/2019	0.612840856	Article
957	266018	DOC	Delivered to	1/10/2019	1/9/2019	0.5948125	Article
958	266019	DOC	Delivered to	1/10/2019	1/9/2019	0.542648264	Article
959	266020	DOC	Delivered to	1/15/2019	1/9/2019	5.808669757	Article
960	266021	DOC	Delivered to	1/10/2019	1/9/2019	0.512691204	Article
961	266022	DOC	Delivered to	1/10/2019	1/9/2019	0.504753657	Article
962	266024	DOC	Delivered to	1/10/2019	1/9/2019	0.350321331	Article
963	266025	DOC	Delivered to	1/10/2019	1/9/2019	0.323472766	Article
964	266026	DOC	Delivered to	1/10/2019	1/10/2019	0.291127049	Article
965	266029	DOC	Delivered to	1/10/2019	1/10/2019	0.006277662	Article
966	266030	DOC	Delivered to	1/10/2019	1/10/2019	0.029353785	Article
967	266033	DOC	Delivered to	1/10/2019	1/10/2019	0.005784954	Article
968	266036	DOC	Delivered to	1/10/2019	1/10/2019	0.088894745	Article
969	266037	DOC	Delivered to	1/10/2019	1/10/2019	0.296922454	Article
970	266038	DOC	Delivered to	1/10/2019	1/10/2019	0.296753426	Article
971	266039	DOC	Delivered to	1/10/2019	1/10/2019	0.190939005	Article
972							
973	AVERAGE TAT						0.91
974							
975							

Resources

- ILLiad Road Map
 - <https://www.atlas-sys.com/illiad-roadmap>
- ILLiad Best Practices Community
 - <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>



ATLAS SYSTEMS
TRAINING & LIBRARY SOLUTIONS