

ILLiad Power Up: Custom Searching



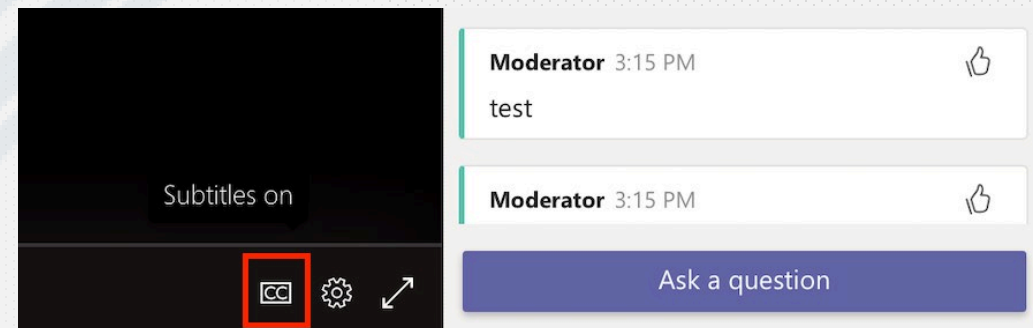
Stephanie Spires



**ATLAS
SYSTEMS**

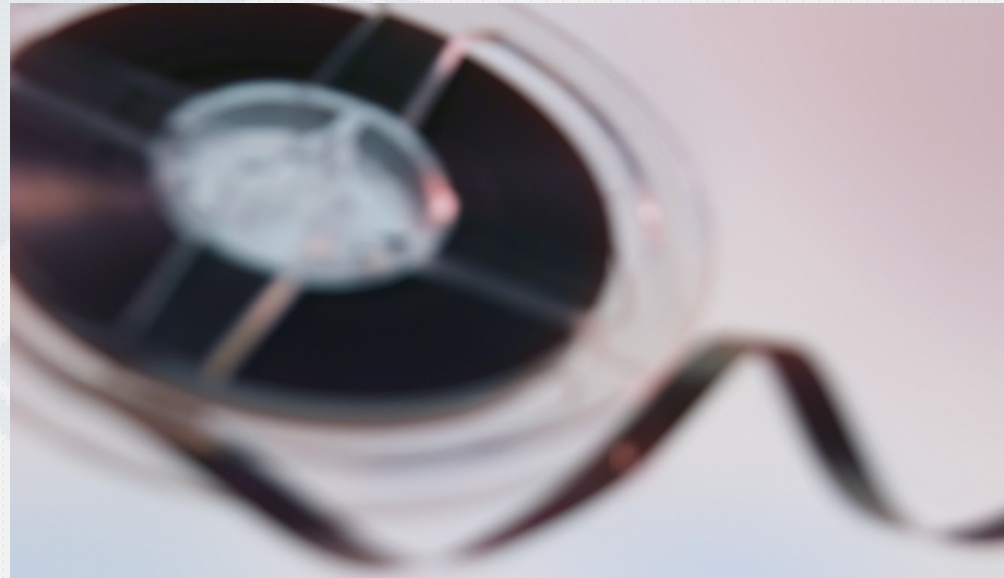
Housekeeping

- Microsoft Teams Live Event
 - Only presenters can talk and share video
 - You can type out questions in the Q&A to the right
 - There is a ~30 second delay in the broadcast
 - You can enable closed captioning by hovering in the bottom right of the video and toggling the CC icon
 - Atlas staff will answer questions within the Q&A as well as live as time allows
 - If Q&A doesn't refresh, log out and back in



→ We are recording!

Atlas Systems, Inc. training sessions may be recorded and made available for later viewing in the Atlas Video Training Library.



What Do ILL Statistics Tell Us?

ILL statistics can be used to:

- Help you to analyze borrowing and lending patterns
- Increase efficiency
- More evenly distribute ILL requests
- Report to state or regional agencies or consortia
- Provide evidence to library administration that ILL has an important role to play in the overall mission of the library
- Learn more about copyright spending and buy vs borrow
- Find data problems

Where to get the data?

- ILLiad

- Web reports
- Custom Search
 - In client
- Database

- OCLC report exports

- <http://www.stats.oclc.org>

- Other data sources

- DOCLINE
- RAPID
- ILS
- Registrar
- Course Management Systems
- & more ...

Topics

The ILLiad Database

- Tables & Fields
- Relationships
- Most used data for reporting
- Tips

Reporting Tool Options

- Custom Search
- Microsoft Excel
- Microsoft Power BI
 - Tableau is a similar tool
 - Other ODBC tools

Security Considerations

- Local policies regarding downloading and storage of user data
- Taking data offsite?
- Security of downloaded data

- Confidentiality of your ILLiad read-only account
 - Who has access to the credentials?
 - Save the odbc connection on a shared machine?

- Distribution of data
 - Secure Sending of reports with any sensitive data
 - Email may not be secure

How to ask the right question

Understand Workflows/Processes

- What statuses apply to which workflow steps?
- What is the order of statuses?

Understand database structure

- Where is the information in the database?
- How do the tables relate?
- Which fields are the most important for my question?

Transactions Table

- ProcessType field identifies if the transaction is borrowing, lending, or doc del
- CreationDate is very useful field
 - contains the date and time the transaction was originally created
- Users are associated with Borrowing and Document Delivery transactions by username
 - Each TN has an associated username that links back to users table

Transactions Table

- Libraries/Institutions are associated with transactions by lendinglibrary symbol and address number
 - Links back to lenderaddresses table via both lendinglibrary and lenderaddressnumber fields
- ItemInfo1 – 5 fields

Users Table

- Every registered user has a record in the table
- Each record has a unique username
 - Can't have two "smith" users but can have smith1 and smith2
- Lots of fields for each user
 - Status and Department
 - Street and email addresses
 - Preferences, etc.
- UserInfo1 – 5 fields

LenderAddresses Table

- Every institution we share with has a record in the table
- These are not just lending libraries – table name can be misleading
 - Each record may have multiple entries with different addresses ex. OSU might have 32+ libraries with unique addresses sharing the same symbol

Tracking/History

- Every status/queue change stored in tracking
- History stores more information such as OCLC updates, billing processing, etc.
- These tables can be really tricky in queries because each TN might have many many records in tracking/history

Tables Available for Custom Searching

- Condition fields can be chosen from the following ILLiad database tables:
 - Transactions
 - Users
 - Tracking
 - History
 - Notes
 - LenderAddresses

No other tables (such as Notes, ReasonsForCancellation, or Groups) can be used in custom searching.

Other Potential Tables of Interest:

- Billing (and associated tables)
- Groups
- History
- LibraryNotes
- ReasonForNoHistory
- Resubmission
- Staff
- Tracking
- UserNotes
- WorldCatInformation

The Billing tables store info about charges and payments for services.

Which Libraries are Members of which Statistical Groups?

Record of Transaction History. What happened and when?

Notes attached to a given library record.

Why do other libraries say no to you?

How many times are you requesting the same items?

Who's doing what?

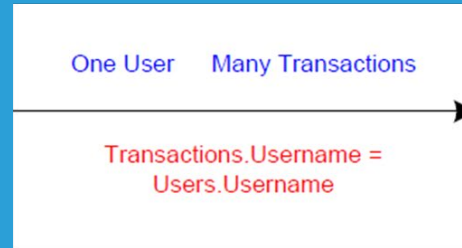
Record of Transaction Status changes over time.

Notes you've attached to User records.

Info imported with OCLC records.

Data Relationships

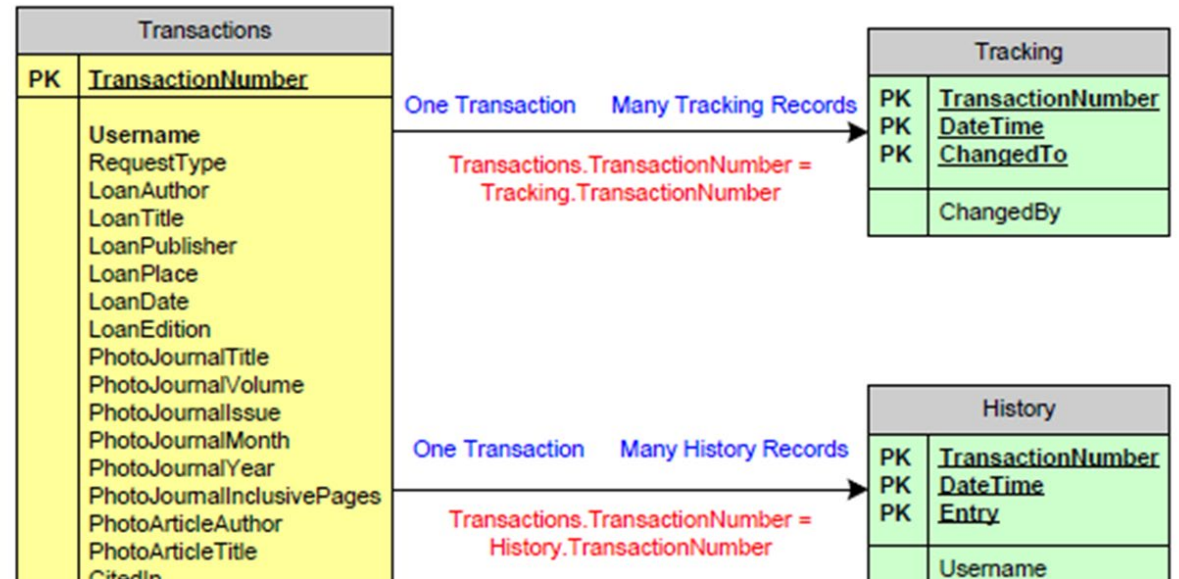
Users	
PK	<u>UserName</u>
	LastName
	FirstName
	SSN
	Status
	EEmailAddress
	Phone
	Department
	NVTGC
	Password
	NotificationMethod
	DeliveryMethod
	LoanDeliveryMethod
	LastChangedDate
	AuthorizedUsers
	Staff
	Cleared
	Web
	Address
	Address2
	City
	State
	Zip



Transactions	
PK	<u>TransactionNumber</u>
	Username
	RequestType
	LoanAuthor
	LoanTitle
	LoanPublisher
	LoanPlace
	LoanDate
	LoanEdition
	PhotoJournalTitle
	PhotoJournalVolume
	PhotoJournalIssue
	PhotoJournalMonth
	PhotoJournalYear
	PhotoJournalInclusivePages
	PhotoArticleAuthor
	PhotoArticleTitle
	CitedIn
	CitedTitle
	CitedDate
	CitedVolume
	CitedPages
	NotWantedAfter

Data Relationships

ILLiad Database - Key Table Relationships



Request Search

The screenshot displays 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 'Number' (with dropdowns for 'TN' and 'ALL'), 'User Information', 'Citation Information', 'Username', 'Name', 'ID', 'Symbol', 'Name', and 'Address'. A search menu is highlighted with a red box, containing 'Request Search' and 'Custom Request Search'. The main area shows a list of 'Requests (17 items)' with various statuses and counts. To the right, a 'Barometer' chart shows the distribution of requests across 'Borrowing' (17), 'Document Delivery' (0), and 'Lending' (104). Below the chart is a 'System' alert table.

Alert	B	D	L
Connection Manager	0	0	1
Odyssey Manager	0	0	0
Outgoing E-Mail	0	0	0
Flagged Requests	24	0	0
Users To Clear	1	0	0

Home Borrowing Document Delivery Lending System

Number	<input type="text"/>	ALL
User Information	<input type="text"/>	ALL
Citation Information	<input type="text"/>	ALL

Search Requests

Main

Borrowing Document Delivery Lending

- Requests (36 items)
- Request Finished
 - Cancelled by ILL Staff
 - Awaiting Stacks Searching
 - Awaiting Shipping Label Printing
 - Awaiting Lending Scanning**
 - Awaiting Lending Request Processing
 - Awaiting Article Exchange Notification

Home

Send via Odyssey Disable Trusted Sender Send via Article Exchange Scan Scan & Insert

Process

Details

Transaction [View](#)

ILL Number

Journal Title

Article Title

Article Author

Lender String

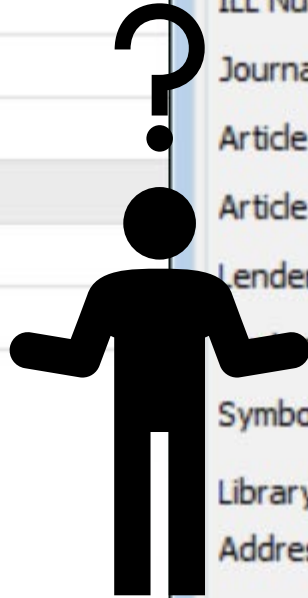
Document ID

Symbol

Library Name

Address

Document



Request Search - ILLiad Client

Home Borrowing Document Delivery Lending System Requests

Borrowing Document Delivery Lending Active Checked Out Cancelled Finished Disregard User Link Search Open Cancel Route Send Notification Export Print

Search Requests Process

Main Request Search x

General Information

Transaction Number

ILL Number

OCLC | Bib Number

Invoice Number

Call Number

Symbol

Item Information

Article Title

Article Author

Journal Title

Loan Title

Loan Author

Patron Name

User Information

Username

Last Name

First Name

Organization

Lender Information

Library Name

Address

Odyssey Address

Limit By Current Statuses

Lending

- Awaiting Article Exchange Notification
- Awaiting Lending Request Processing
- Awaiting Lending Scanning
- Awaiting Shipping Label Printing
- Awaiting Stacks Searching
- Cancelled by ILL Staff
- Request Finished

Drag a column header here to group by that column

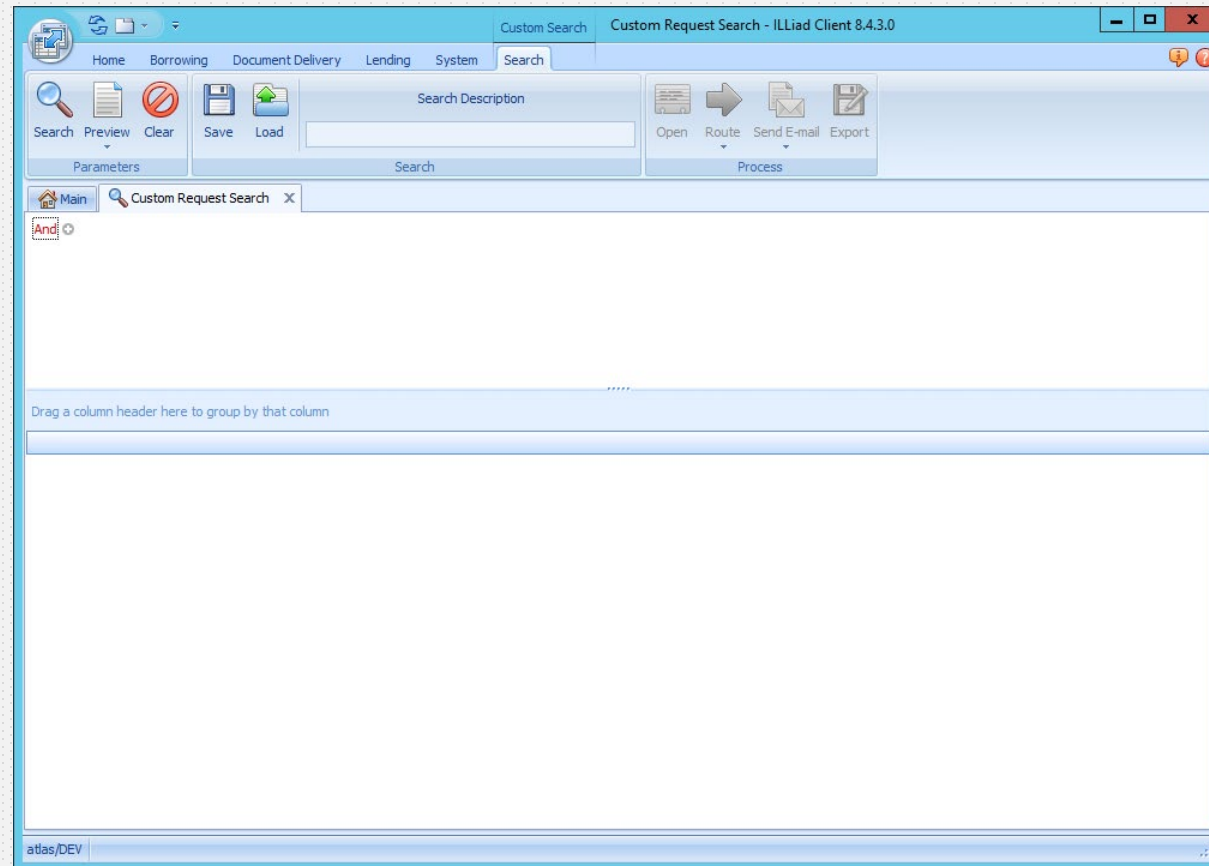
Transactio...	Username	Request Type	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	PI
54	MAIN	Article							Clinical med...	1	3	M
61	MAIN	Article							Magyar tra...	20	4	
62	MAIN	Article							Clinical med...	1	3	M
64	MAIN	Article							Clinical med...	1	3	M
72	MAIN	Article							Clinical med...	1	3	M

Custom Search

The screenshot displays 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 Username, Name, ID, Symbol, Name, and Address, each with a search icon. A red box highlights a dropdown menu with two options: 'Request Search' and 'Custom Request Search'. The main area is divided into three sections: 'Requests (17 items)' with a list of request statuses and counts, a 'Barometer' chart showing counts for Borrowing (17), Document Delivery (0), and Lending (104), and a 'System' alert table.

Alert	B	D	L
Connection Manager	0	0	1
Odyssey Manager	0	0	0
Outgoing E-Mail	0	0	0
Flagged Requests	24	0	0
Users To Clear	1	0	0

Custom Search



Custom Request Search - ILLiad Client

Home Borrowing Document Delivery Lending System Search

Search Description

Search Preview Clear Save Load

Open Route Send Notification Add Flag Export

Parameters Search Process

Main Custom Request Search x

And +

[Transactions.SystemID] Equals DOC x

[Transactions.ProcessType] Equals Lending x

[Transactions.ReasonForCancellation] Equals Other x

[Transactions.CreationDate] Is between 1/1/2019 and 7/31/2019 x

Drag a column header here to group by that column

Transactio...	Username	Request Type	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...
70	MAIN	Article							Clinical med...	1	3	May
66	MAIN	Article							Clinical med...	1	3	May

sspires/MAIN 2 records

Click to change the current operator and add or remove condition groups

Condition group

Click to select another column

Click to change the criteria operator

Click to add a new condition

Click to remove this condition

Photo Jo... | Photo Jour... | Photo Articl... | Photo Articl... | Cited In

1976

Values | Text Filters

Enter text to search...

- (All)
- 1976
- 1977
- 1978
- 1979
- 2001
- 2014
- 2018

Clear Filter | Close

Custom Request Search - ILLiad Client

Home | Borrowing | Document Delivery | Lending | System | Search

Search | Preview | Clear | Save | Load

Search Description

Open | Route | Send Notifica

Parameters | Search | Process

Main | Custom Request Search

And

- [Transactions.SystemID] Equals DOC
- [Transactions.ProcessType] Equals Lending

Drag a column header here to group by that column

Loan Pu...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jo...
				The Journa...			Dec	1976

[X] [Photo Journal Year] = '1976'

sspires/MAIN | 1 of 33 records (filtered)

Creation Date	Item Info1	Item Info2	Item Info3	Item Info4
3/5/2019 12:47 PM				
3/5/2019 3:34 PM				
3/5/2019 3:34 PM				
3/5/2019 3:34 PM				
2/20/2019 1:53 PM				
2/20/2019 2:02 PM				
2/20/2019 2:02 PM				
2/20/2019 2:02 PM				
3/5/2019 2:51 PM				
3/5/2019 4:50 PM				
3/5/2019 4:50 PM				
2/21/2019 10:11 AM				
2/21/2019 10:11 AM				

Values Date Filters

Specific Date Periods

- Specific Date Periods
- Is Same Day
- Equals**
- Does Not Equal
- Is Null
- Is Not Null
- Between
- Before
- After
- Yesterday
- Today
- Tomorrow
- Last Week
- This Week
- Next Week
- Last Month
- This Month
- Next Month
- Last Year
- This Year
- Next Year
- Year To Date
- All Dates In The Period
- Custom Filter

Creation Date	Item Info1	Item Info2	Item Info3	Item Info4
3/5/2019 12:47 PM				
3/5/2019 3:34 PM				
3/5/2019 3:34 PM				
3/5/2019 3:34 PM				
2/20/2019 1:53 PM				
2/20/2019 2:02 PM				
2/20/2019 2:02 PM				
2/20/2019 2:02 PM				
3/5/2019 2:51 PM				
3/5/2019 4:50 PM				
3/5/2019 4:50 PM				
2/21/2019 10:11 AM				
2/21/2019 10:11 AM				

Values Date Filters

Specific Date Periods

Specific Date Periods

- Yesterday
- Today
- Tomorrow
- Last Week
- This Week
- Next Week
- Last Month
- This Month
- Next Month
- Last Year
- This Year
- Next Year

Clear Filter Close

Creation Date	Item Info1	Item Info2	Item Info3	Item Info4
2/21/2019 10:11 AM				
2/21/2019 10:11 AM				
2/21/2019 10:11 AM				
3/4/2019 1:26 PM				
3/4/2019 1:26 PM				
3/4/2019 1:26 PM				
3/5/2019 12:47 PM				
3/5/2019 12:47 PM				
3/5/2019 2:51 PM				
3/5/2019 2:51 PM				
3/5/2019 2:51 PM				
3/5/2019 2:51 PM				
3/5/2019 2:51 PM				
3/5/2019 3:33 PM				

Values Date Filters

Enter text to search...

- (All)
- 2019
 - February
 - March

Clear Filter Close

Transaction Status	Transaction...	ISSN
Awaiting Lending Scanning		
Cancelled by ILL Staff		
Cancelled by ILL Staff		
Awaiting Lending Request Processing		
Awaiting Lending Request Processing		
Awaiting Shipping Label Printing		
Awaiting Stacks Searching		
Awaiting Lending Scanning		
Awaiting Lending Scanning		
Cancelled by ILL Staff		
Awaiting Lending Scanning		
Awaiting Article Exchange Notification		
Cancelled by ILL Staff		

Values Text Filters

Enter text to search...

- (All)
- Awaiting Article Exchange Notification
- Awaiting Lending Request Processing
- Awaiting Lending Scanning
- Awaiting Shipping Label Printing
- Awaiting Stacks Searching
- Cancelled by ILL Staff
- Request Finished

Transaction Status	Transaction...	ISSN
Awaiting Lending Scanning		
Cancelled by ILL Staff		
Cancelled by ILL Staff		
Awaiting Lending Request Processing		
Awaiting Lending Request Processing		
Awaiting Shipping Label Printing		
Awaiting Stacks Searching		
Awaiting Lending Scanning		
Awaiting Lending Scanning		
Cancelled by ILL Staff		
Awaiting Lending Scanning		
Awaiting Article Exchange Notification		
Cancelled by ILL Staff		

Values Text Filters

Cancelled by ILL Staff - ILLiad Client

Home Borrowing Document Delivery Lending System Process

Open Cancel Route Add Flag Send Notification Export Print

Process

Main Custom Request Search Search Results Cancelled by ILL Staff Request Fin

Search: jones Find Clear

Drag a column header here to group by that column

Transactio...	Username	Request Type	Photo Jour...	Photo Ar...	Loan Author	Loan Title
31	MAIN	Artide	Social psyc...	Jones N, T...		
47	MAIN	Artide	Social psyc...	Jones N, T...		
55	MAIN	Artide	Social psyc...	Jones N, T...		
63	MAIN	Artide	Social psyc...	Jones N, T...		
71	MAIN	Artide	Social psyc...	Jones N, T...		

Drag a column header here to group by that column

Transact...	Request Type	Username	Loan Title	Loan Publis...
29	Loan	MAIN		
30	Artide	MAIN		Hamden, C...
31	Artide	MAIN		
32	Artide	MAIN		
44	Artide	MAIN		
45	Artide	MAIN		
46	Artide	MAIN		
47	Artide	MAIN		
48	Artide	MAIN		
49	Artide	MAIN		
50	Artide	MAIN		
51	Artide	MAIN		
52	Artide	MAIN		
53	Artide	MAIN		

- Sort Ascending
- Sort Descending
- Clear All Sorting
- Group By This Column
- Hide Group By Box
- Hide This Column
- Column Chooser
- Best Fit
- Best Fit (all columns)
- Filter Editor...
- Show Find Panel
- Show Auto Filter Row
- Clear Columns
- Restore Default Layout
- Export...

Custom Request Search

sspires/MAIN 34 records

Home Borrowing

Search Preview Clear Save Load

Parameters Search

Main Custom Request Search Search Results Cancelled by ILL Staff Request Fin

And +

[Transactions.ProcessType] Equals Lending

Drag a column header here to group by that column

Photo Jour...	Photo Jour...	Photo Jour...	Photo Artid...	Photo Article Title	Cited In
eb	1978	479-85	Furihata C,...	A new fluorescent microassay method for pepsin ...	

Saving Custom Searches

- ILLiad saves custom search queries with the following file extensions:
 - Custom Request Search: .irrp
 - Custom User Search: .iurp
 - Custom Lender Search: .ilrp
- Local custom searches default to a Searches folder that lives under the currently logged in user's My Documents folder (My Documents\ILLiad\Searches). The client Search and Load dropdowns are auto-populated with searches saved to this location.

Saving Custom Searches

- Search query results can be exported to excel by right-clicking on any heading in the results grid, then select **Export**.
- These queries can also be saved in a shared location by using the **SharedCustomSearchesPath** Customization Key

Filter Expression Syntax

In	Is any of. Selects data field values that equal any of the entered filtering values.	[ShipCountry] In ('Germany', 'Italy', 'USA')
Not In	Is none of. Selects data field values that do not equal any of the entered filtering values.	Not [ShipCountry] In ('Germany', 'Italy', 'USA')
Like	Is like. Selects data field values that contain the filtering value. Accepts wildcards: '_' to replace a single character, '%' to replace any number of characters.	[OrderDate] Like '%2011' <i>same as</i> Contains ([OrderDate], '2011')
Not Like	Is not like. Selects data field values that do not contain the filtering value. Accepts wildcards: '_' to replace a single character, '%' to replace any number of characters.	Not [OrderID] Like '103__' <i>same as</i> Not [OrderID] Between ('10300', '10399')

A few notes

- Run reports at non-peak hours
 - They can tie up the SQL server and slow down client processing
- Export only what you need and don't export fields that pose a security risk if you can avoid it
 - Secure any exported data and follow all of your local privacy policies
- Use your instincts and spot check for testing
- Practice and experiment!

Fun with SQL Joins (for us Data Nerds)

Kevin Ford • 2 years ago

Using Custom Search for the Elusive Borrowing Renewal Statistics

Kevin Ford • 2 years ago

Arthur asks about custom searches to find Doc Del requests for print journals...

Stephanie Spires • 2 years ago

Running Web Reports Queries in Microsoft Access

Kerry Keegan • 2 years ago

Those Pesky ILL Requests that No One Picks up

Kevin Ford • 2 years ago

SQL Server Tricks and Tips from a Self-Proclaimed Data Nerd

Kevin Ford • 2 years ago

support.atlas-sys.com

The screenshot shows a web browser window with the URL <https://support.atlas-sys.com/hc/en-us/community/topics>. The page title is "Atlas Systems - Community". Below the title, there are tabs for "Topics" and "Posts", and a "New post" button. The main content area displays a grid of topic cards, each with a title, number of posts, and number of followers.

Topic	Posts	Followers
Aeon	87 posts	46 followers
ArchivesSpace	68 posts	28 followers
Aeon & ArchivesSpace Integration	5 posts	26 followers
AtlasBI, Reporting, & Data Analytics (Special Collections & Archives)	11 posts	19 followers
Web Visibility (Special Collections & Archives)	7 posts	15 followers
ILLiad Best Practices	96 posts	42 followers
Ares	57 posts	28 followers
AtlasBI, Reporting, & Data Analytics (Access Services)	11 posts	16 followers

What can we help you with?

Search



UserVoice

Help decide future features of all your favorite Atlas products!



Video Training Library

Visit the Video Training Library for bite-sized video tutorials on specific topics!



Community

Need help? Browse through the topics and posts for an answer or login and take part in the community.



Submit a request

Do you have a question and can't find an answer? Are you having technical issues? Submit a ticket to our support team!

Knowledge base

Atlas Addons

Addons allow you to add extra functionality to ...

ILLiad

A knowledge repository on everything ILLiad.

AtlasBI

Intelligence and reporting analytics system docs.

Ares

Learn how to use and troubleshoot Ares.

Aeon

Aeon documentation and tips and tricks.

Promoted articles

★ ILLiad Downloads

Client Installer For your convenience, below...

★ Ares Downloads

Ares Client Installer This file includes...

★ Aeon 4.1 PCI Release FAQ

The 4.1 update has not been released yet. The L...

★ ILLiad 9.0 FAQ

In this article, we will go over frequently ask...

★ Ares 4.7 Release Notes

Released 30 May 2018 Support for Ares 4.5 en...

★ Aeon 4.1 PCI Security Release Notes

Important Update Information Release Date: 20 M...

★ ILLiad 9.0 Release Notes

Release Date 26 November 2018. Support for IL...

★ Aeon Downloads

Client Installer For your convenience, befo...

★ Aeon 4.0 Release Notes

Aeon 4.0 Highlights Start can choose to remove...

Can't find what you're looking for?

Let us help you right now!

Submit a request

Support Center

Please visit <https://support.atlas-sys.com> to view product documentation and training videos, connect with colleagues in community forums, and submit support and enhancement requests.

Atlas Systems Concierge Services

- Onsite Tune-up
- Onsite Training
- Web Tune-up
- Database Tune-up
- Video Training Library
- Concierge Service



Heather Black
Access Services Concierge



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Atlas Website

<https://www.atlas-sys.com/>

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