ILLiad

# Home Delivery Options

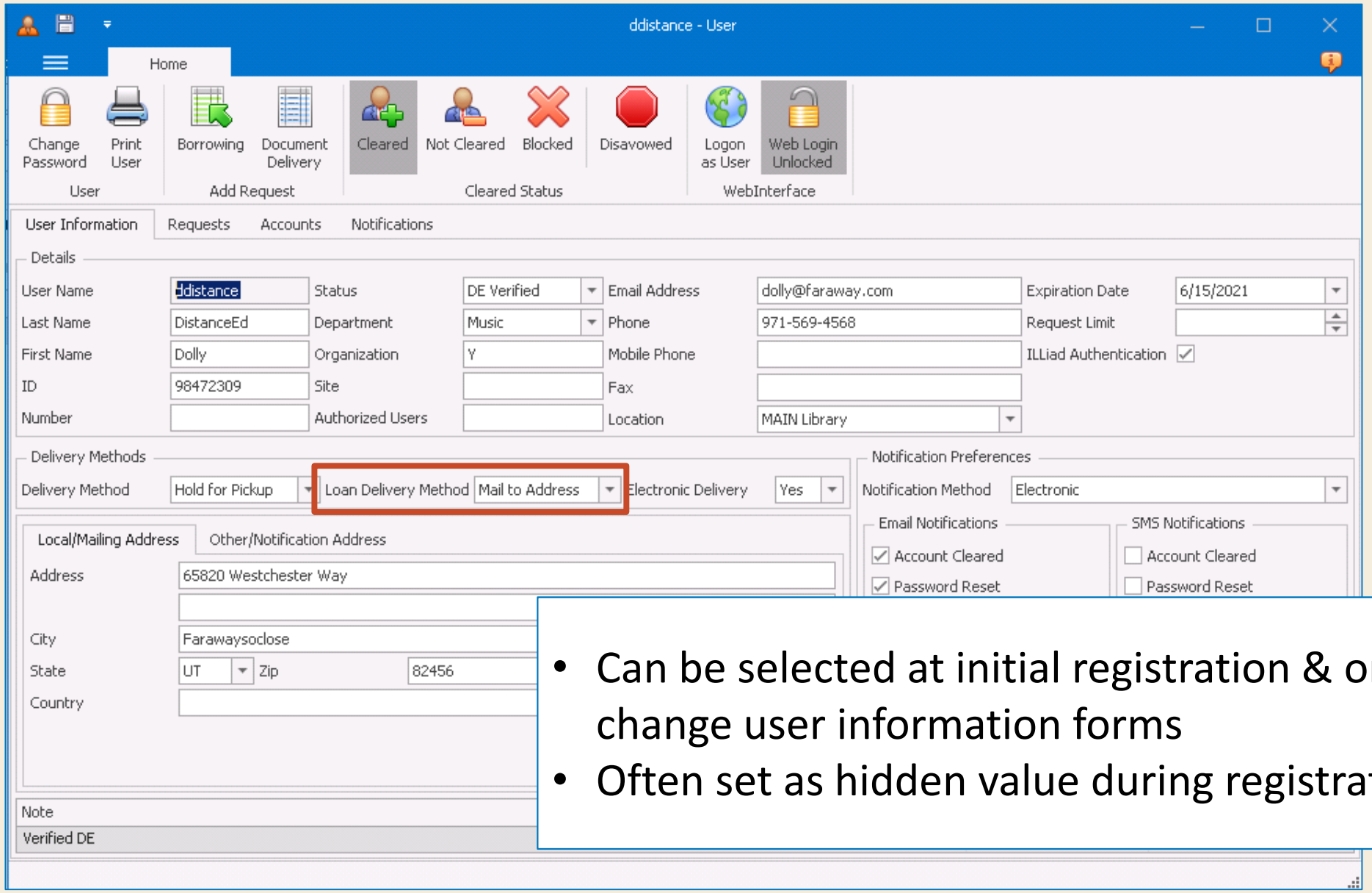
*ILLiad Power-Up Series*

ATLAS SYSTEMS
TRAINING & LIBRARY SOLUTIONS

# Agenda

- Default **Mail to Address** Workflow Review
  - Borrowing
  - Doc Del
    - Customization Options
      - Email Notifications
      - Print Templates
- Managing User Record Updates
- Alternate Workflow Options
- Optional: Focus Group Discussion

# User Record Indicator: Loan Delivery Method




- Can be selected at initial registration & on change user information forms
- Often set as hidden value during registration

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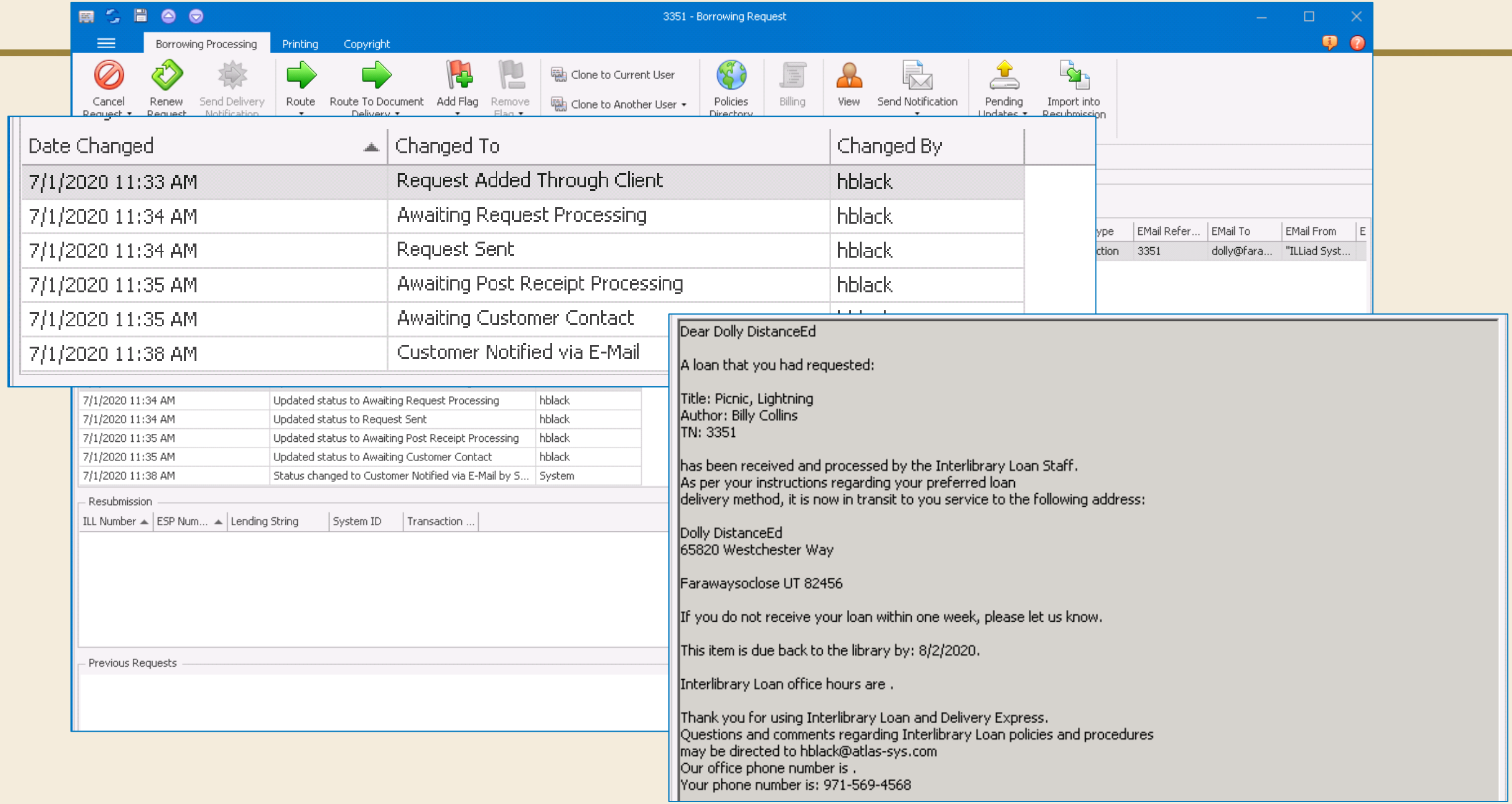
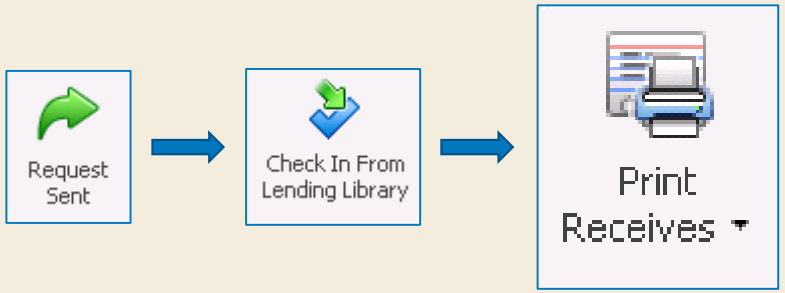
# BORROWING


3351 - Borrowing Request
Borrowing Processing
Printing
Copyright
Cancel Request
Renew Request
Send Delivery Notification
Route
Route To Document Delivery
Add Flag
Remove Flag
Clone to Current User
Clone to Another User
Policies Directory
Billing
View
Send Notification
Pending Updates
Import into Resubmission
Date Changed
Changed To
Changed By
7/1/2020 11:33 AM
Request Added Through Client
hblack
7/1/2020 11:34 AM
Awaiting Request Processing
hblack
7/1/2020 11:34 AM
Request Sent
hblack
7/1/2020 11:35 AM
Awaiting Post Receipt Processing
hblack
7/1/2020 11:35 AM
Awaiting Customer Contact
7/1/2020 11:38 AM
Customer Notified via E-Mail
ype
EMail Refer...
EMail To
EMail From
ction
3351
dolly@fara...
"ILLiad Syst...
7/1/2020 11:34 AM
Updated status to Awaiting Request Processing
hblack
7/1/2020 11:34 AM
Updated status to Request Sent
hblack
7/1/2020 11:35 AM
Updated status to Awaiting Post Receipt Processing
hblack
7/1/2020 11:35 AM
Updated status to Awaiting Customer Contact
hblack
7/1/2020 11:38 AM
Status changed to Customer Notified via E-Mail by S...
System
Resubmission
ILL Number
ESP Num...
Lending String
System ID
Transaction ...
Previous Requests
Dear Dolly DistanceEd
A loan that you had requested:
Title: Picnic, Lightning
Author: Billy Collins
TN: 3351
has been received and processed by the Interlibrary Loan Staff.
As per your instructions regarding your preferred loan
delivery method, it is now in transit to you service to the following address:
Dolly DistanceEd
65820 Westchester Way
Farawaysoclose UT 82456
If you do not receive your loan within one week, please let us know.
This item is due back to the library by: 8/2/2020.
Interlibrary Loan office hours are .
Thank you for using Interlibrary Loan and Delivery Express.
Questions and comments regarding Interlibrary Loan policies and procedures
may be directed to hblack@atlas-sys.com
Our office phone number is .
Your phone number is: 971-569-4568

# Default Borrowing Workflow Steps

- Request Sent
- Check In from Lending Library
- Awaiting Post Receipt Processing
- Print Receives
  - Customization: Print Delivery Method on Label
- Awaiting Customer Contact
  - Note: No **In Transit** step
- Customer Notified via E-Mail
- Manual Check Out
- Checked Out to Customer

# Workflow: Print Receives




## Hold for Pickup

DUE DATE: 8/2/2020

TN: 60

Title: Ghost towns of the West /

Author: Florin, Lambert.

Customer: Dickinson, Emily

Username: dickinsone
Email: edickinson@yahoo.edu

**Please Return to:**

## Mail to:

Dolly DistanceEd
65820 Westchester Way
Farawaysoclose, UT 82456

DUE DATE: 7/31/2020

TN: 3353

Title: Picnic, Lightning

Author: Billy Collins

Customer: DistanceEd, Dolly

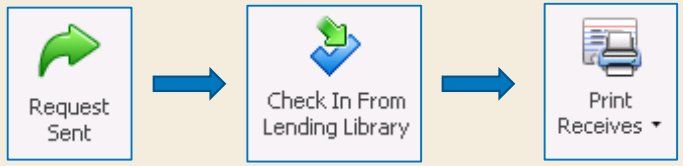
Username: ddistance
Email: dolly@faraway.com

**Please Return to:**

Customization Option #1

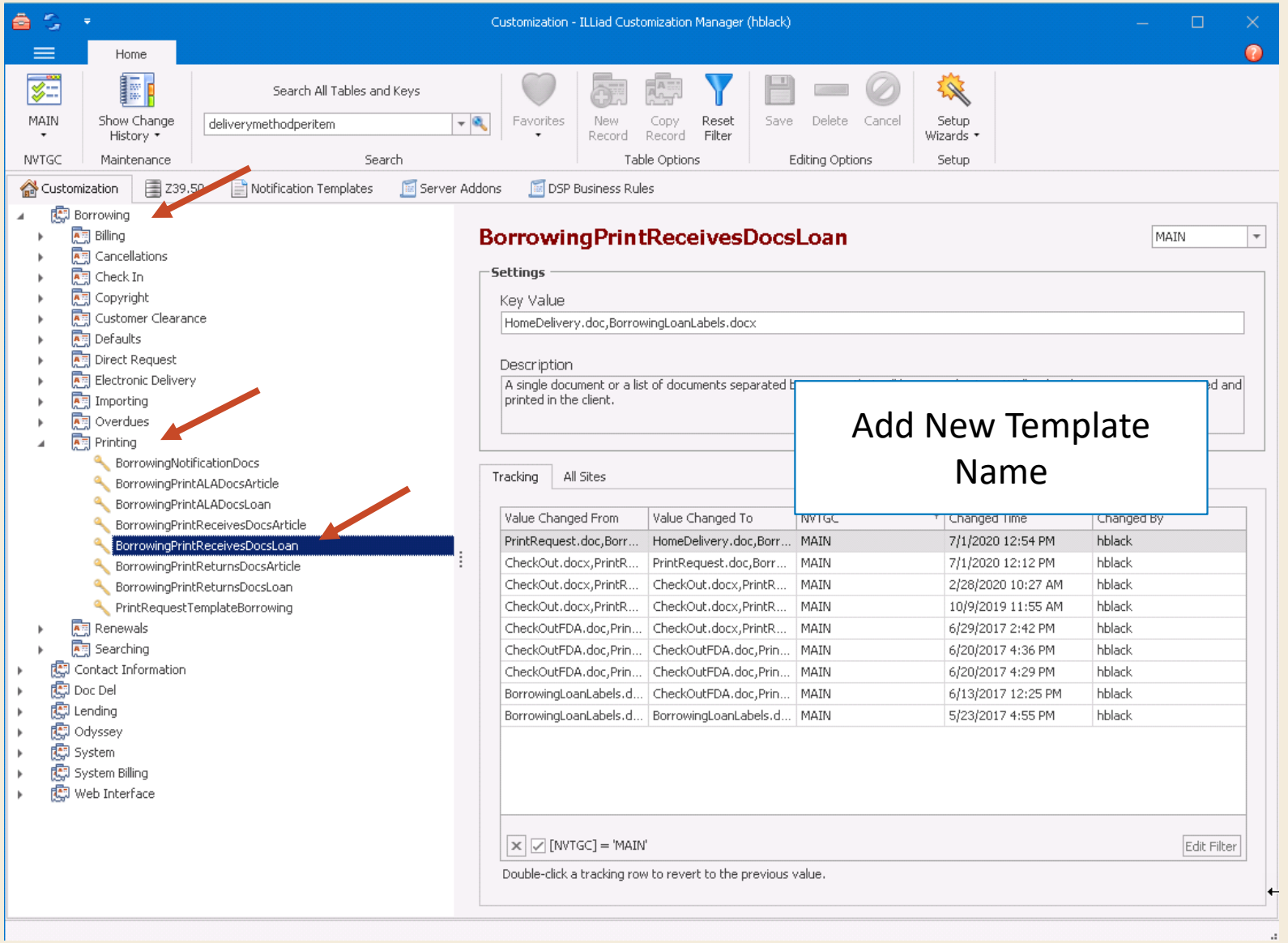
Modify pull slip with IF/THEN statement to use same template for both Delivery Methods

# Workflow: Print Receives

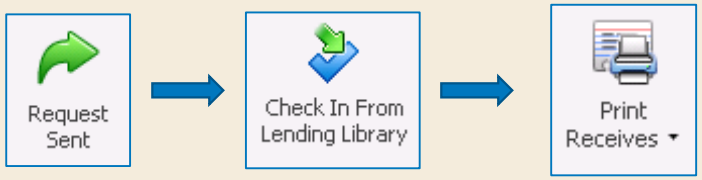


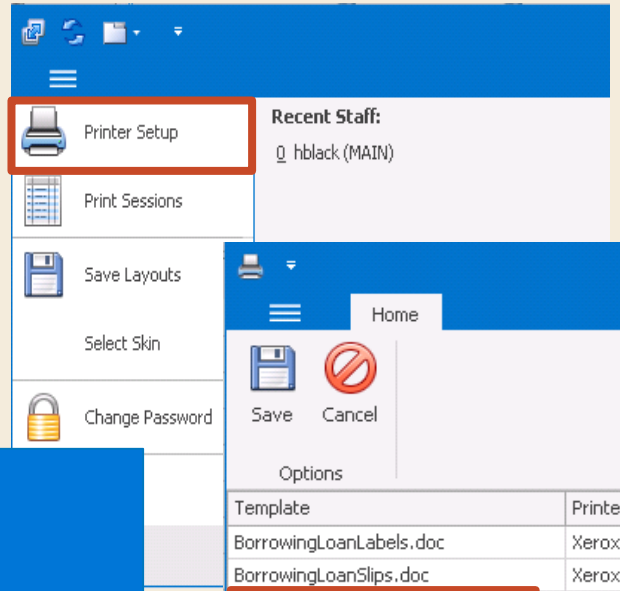

**Customization Option #2**

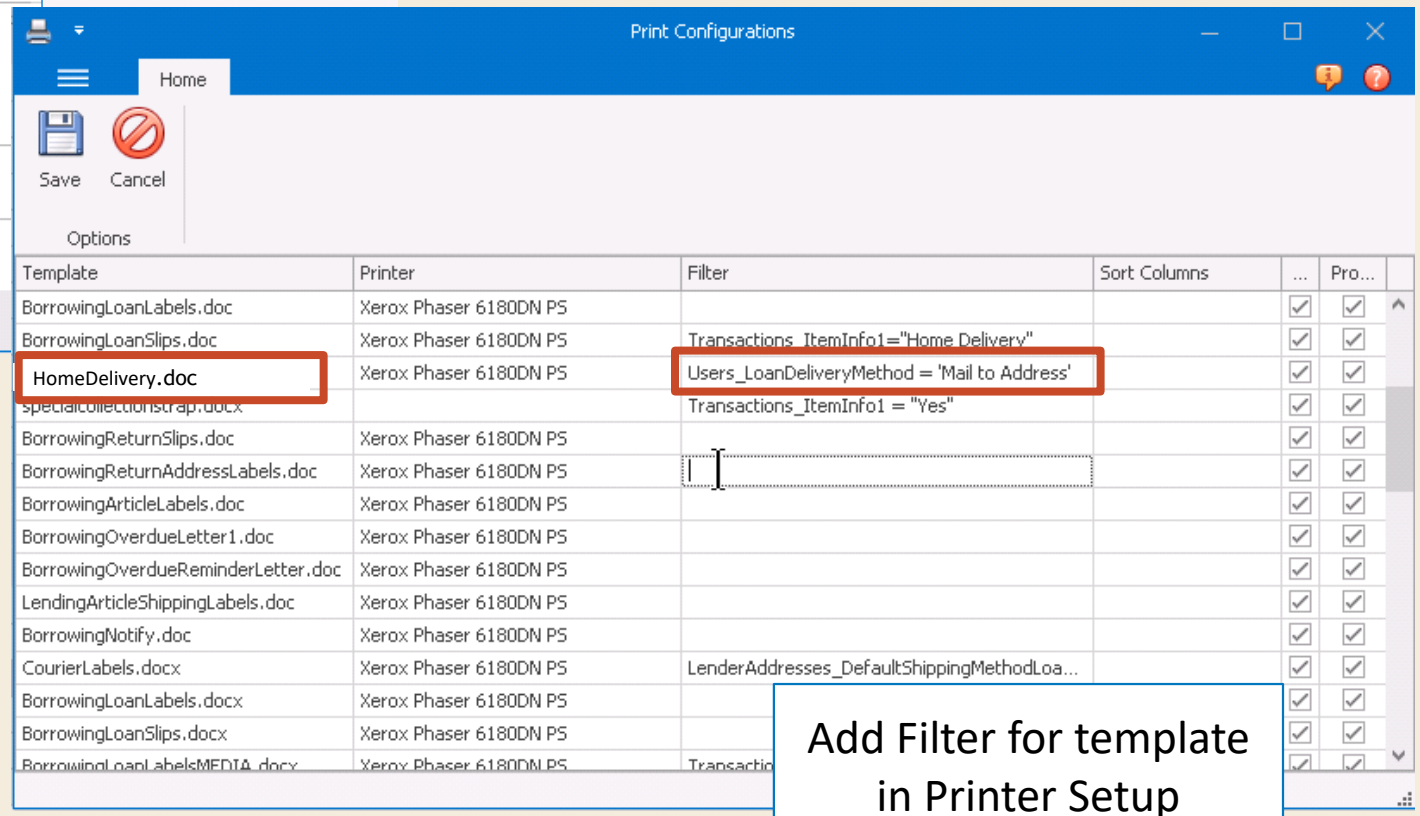
Use alternate template for Mail to Address requests with Customization Manager keys and Print Filters



# Workflow: Print Receives



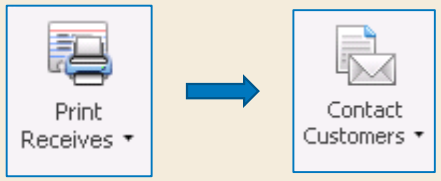



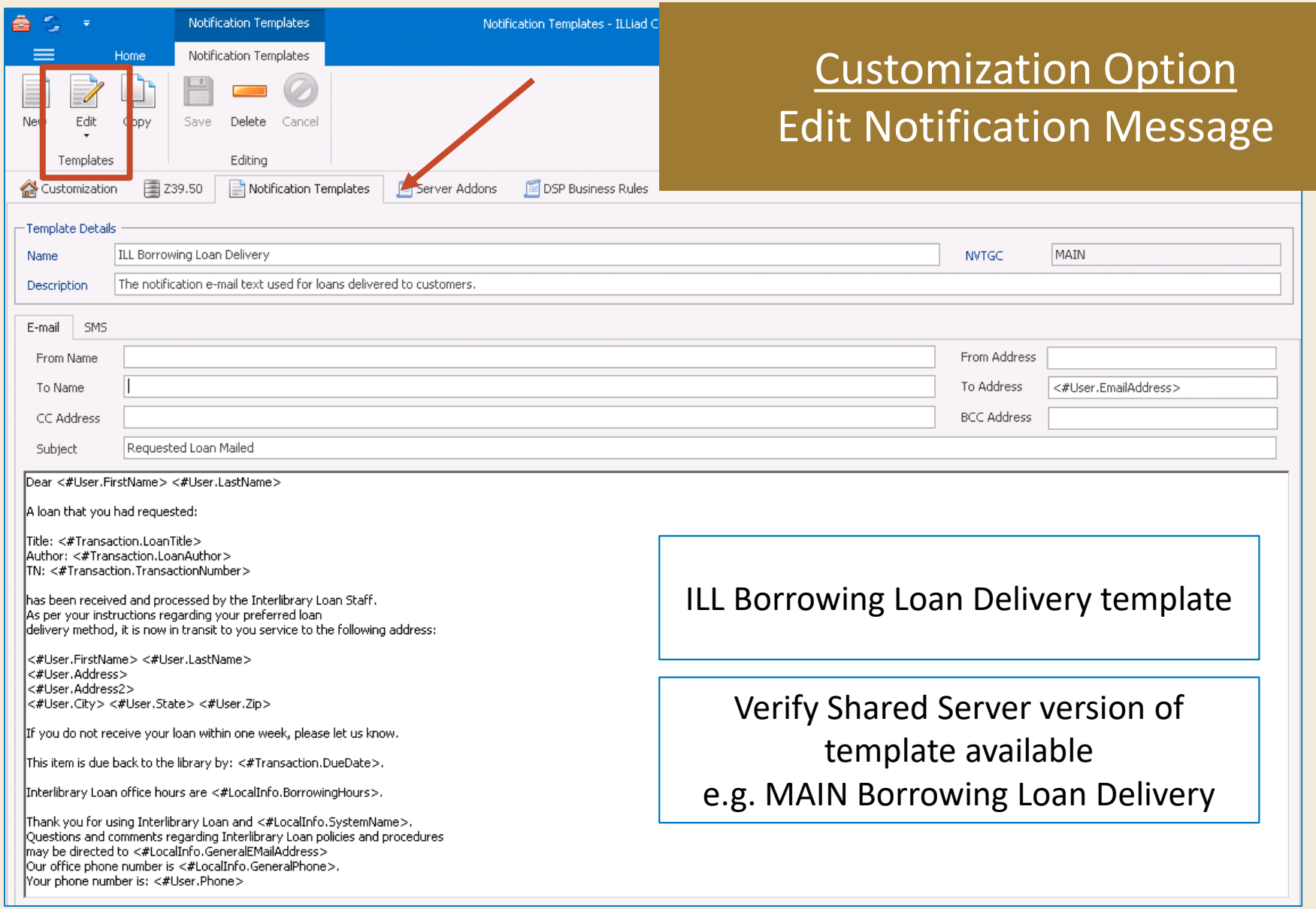

Add Filter for template in Printer Setup

<u>Customization Option #2</u>

Use alternate template for Mail to Address requests with Customization Manager keys and Print Filters

# Workflow: Customer Contact



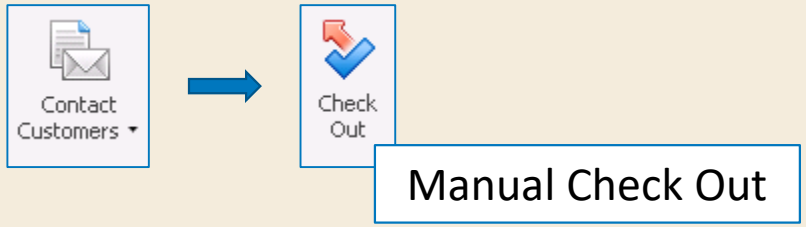




**Customization Option**
Edit Notification Message

ILL Borrowing Loan Delivery template

Verify Shared Server version of template available
e.g. MAIN Borrowing Loan Delivery

# Check Out to Customer




**Customization Option**
Automatic Check-Out

| | |
|---|---|
| RuleNo | 251 |
| RuleActive | Yes |
| ProcessType | Borrowing |
| TransactionStatus | Customer Notified via E-Mail |
| MatchString | u.LoanDeliveryMethod = 'Mail to Address' |
| NewProcessType | Borrowing |
| NewTransactionStatus | Checked Out to Customer |
| RuleDescription | Home delivery check out after email is sent |

Set up Routing to skip to Checked Out to Customer based on u.LoanDeliveryMethod = 'Mail to Address'

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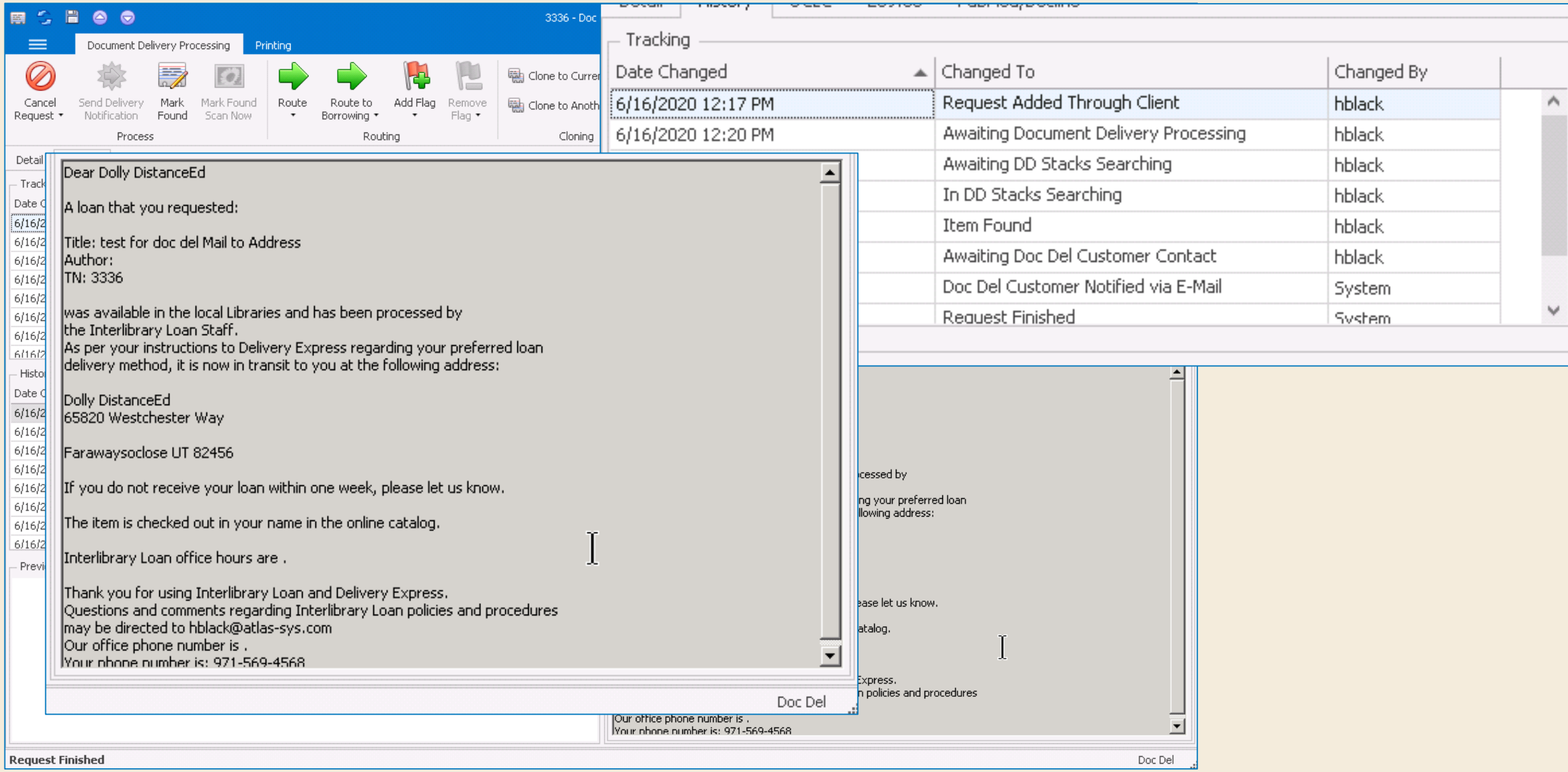
# DOCUMENT DELIVERY

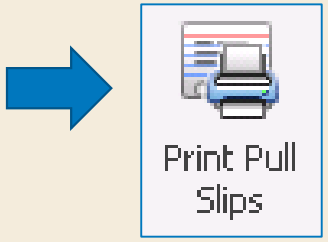
# Doc Del Home Delivery Workflow



# Default Doc Del Workflow Steps

- Awaiting DD Stacks Searching
- Print Pull Slips
- Update Stacks Search—Mark Found
- Awaiting Doc Del Customer Contact
  - Note: no **In Transit** step
- Doc Del Customer Notified by Email
- Request Finished
- Circulation managed in ILS

# Workflow: Print Pull Slips




DocDelLoanLabels.doc

Western State University Document Delivery

ID#:

Call Number: call# - location

CHECKED OUT TO:
DistanceEd, Dolly - ddistance
65820 Westchester Way -
Farawaysoclose, UT 82456

TN: 3336
Title: test for doc del Mail to Address
Author:

Due Date: 7/9/2020 Pieces:

PLEASE RETURN TO:
Western State University

Western State University Document Delivery

ID#:

Call Number: -

CHECKED OUT TO:
Avison, Margaret - mavison
3120 Driftwood Dr - Suite 200
Manhattan, KS 66503

TN: 1553
Title: The man who was thursday
Author: GK Chesterton

Due Date: Pieces:

PLEASE RETURN TO:
Western State University

**Default Print Templates**

DocDelLoanLabels.doc

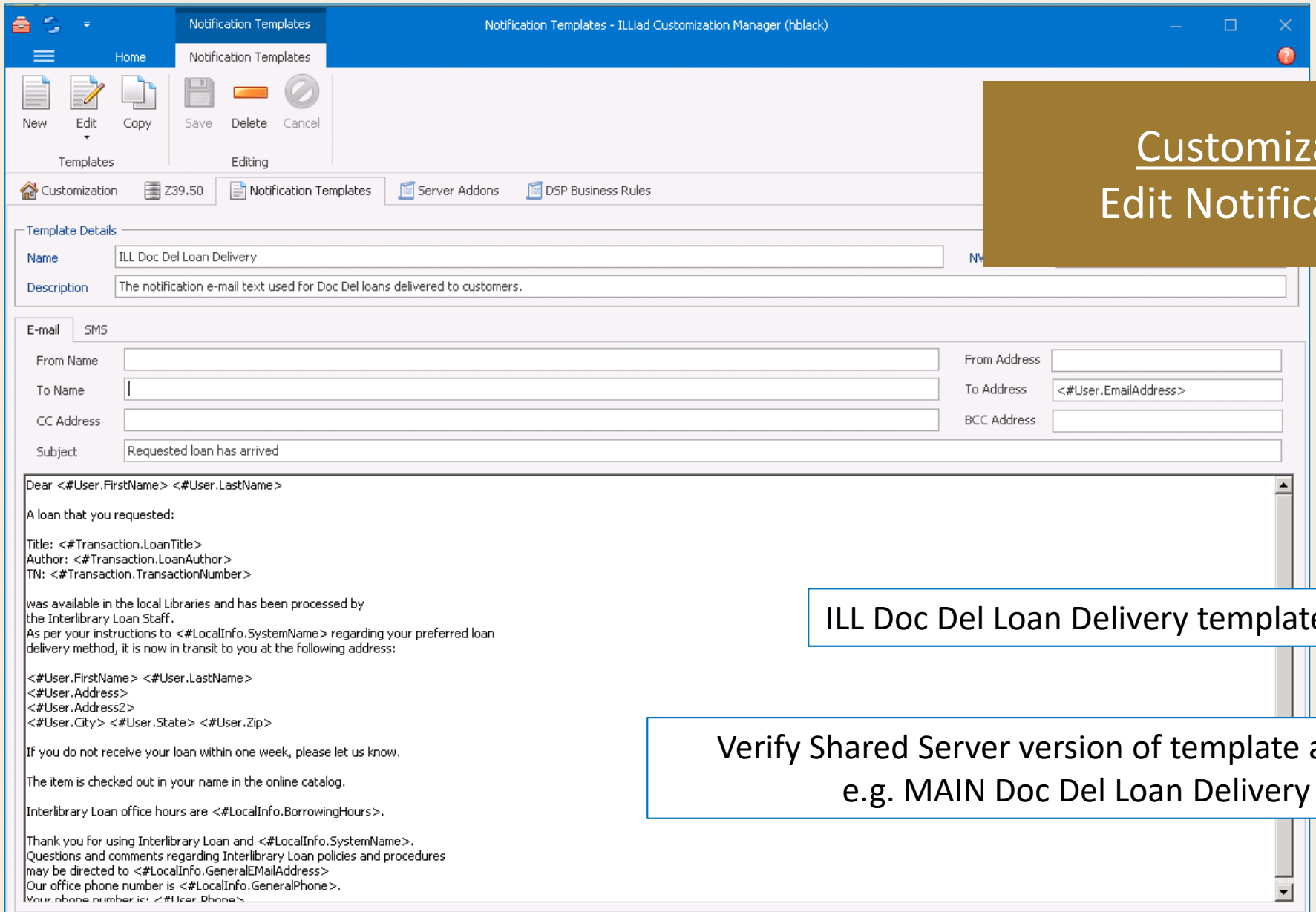
DocDelLoanSlips.doc

Customization Option

Edit Print Templates

Same as Borrowing

# Workflow: Customer Contact




**Customization Option**
Edit Notification Message

ILL Doc Del Loan Delivery template

Verify Shared Server version of template available
e.g. MAIN Doc Del Loan Delivery

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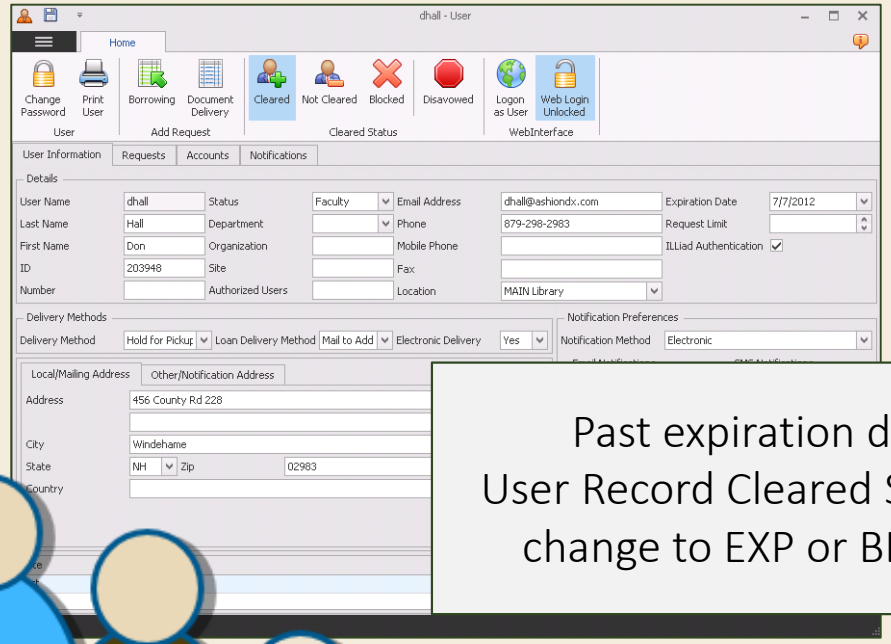
# MANAGING USER RECORDS

# User Expiration

- ILLiad 9.1 Feature Expires user accounts
- Based on Expiration Date
- Requires users to update user record
- Coordinate with implementation of Home Delivery

# User Status and the System Manager

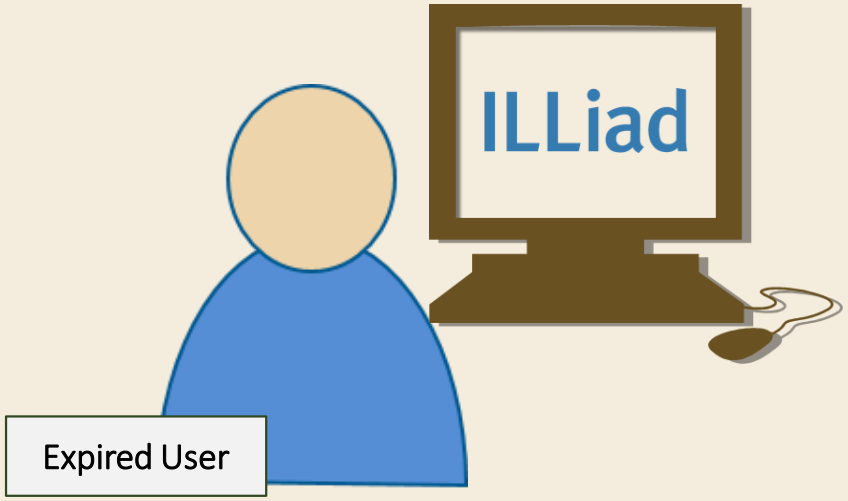
System Manager checks User Expiration Date every 12 hours

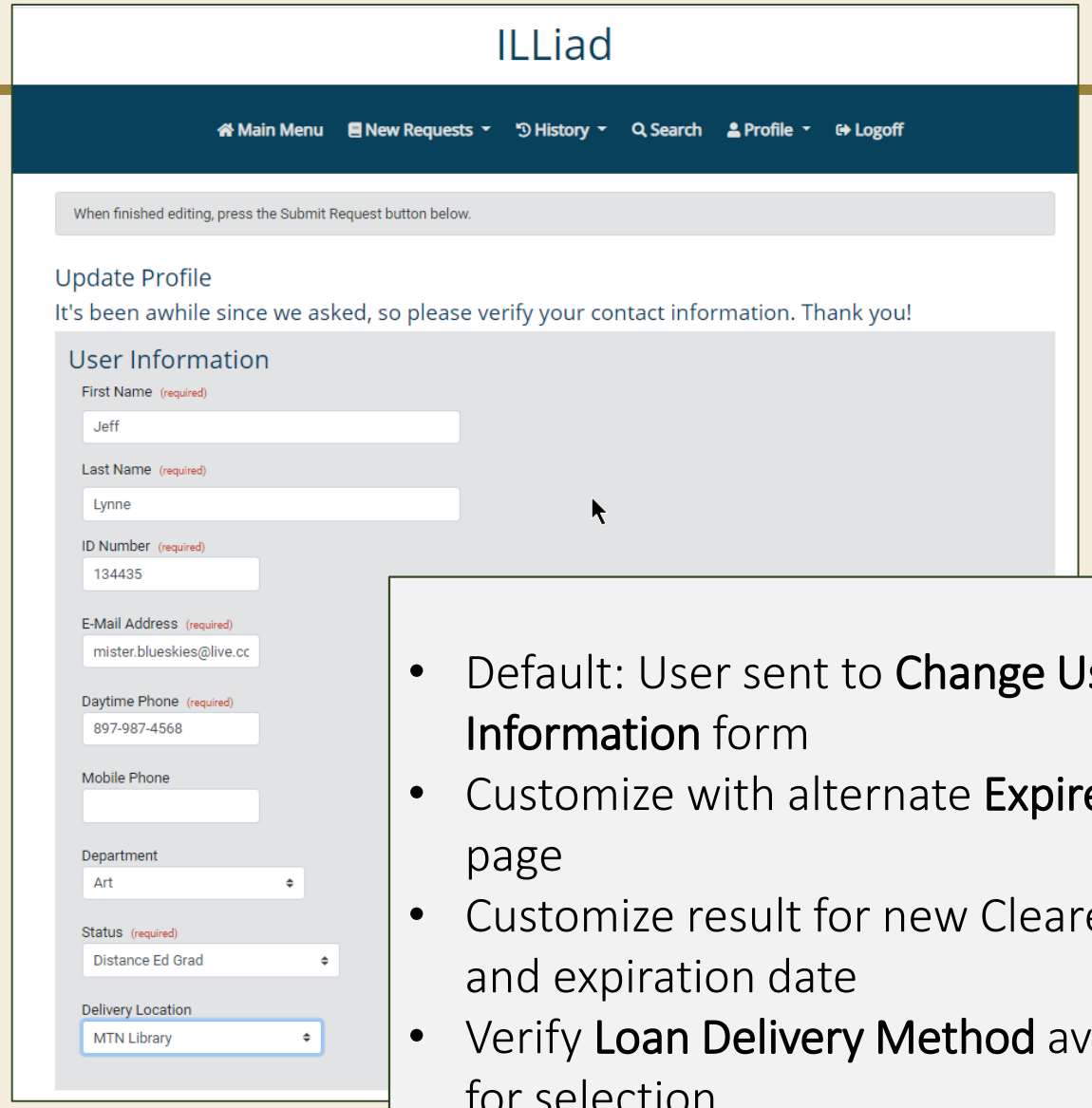


Past expiration date = User Record Cleared Status will change to EXP or BLOCKED

# Expired User Login

- User prompted to update information

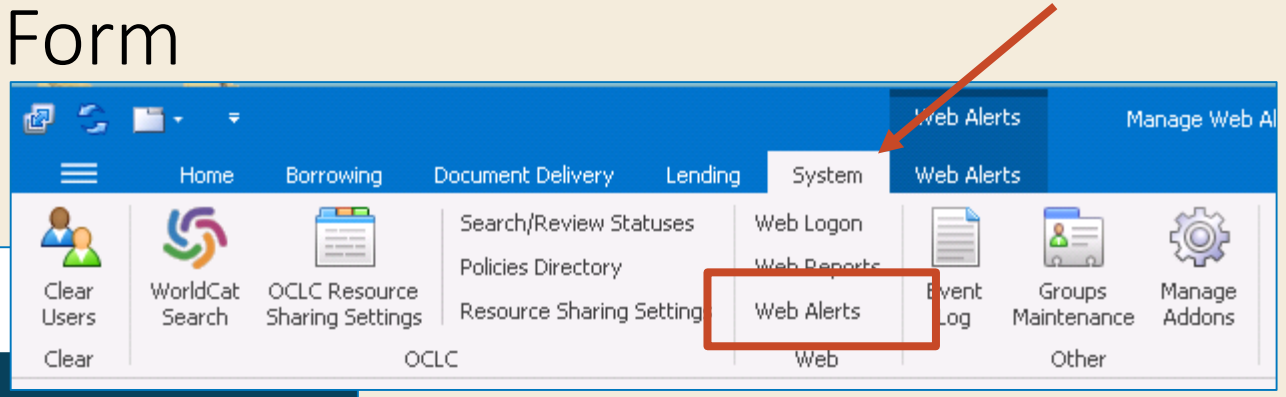


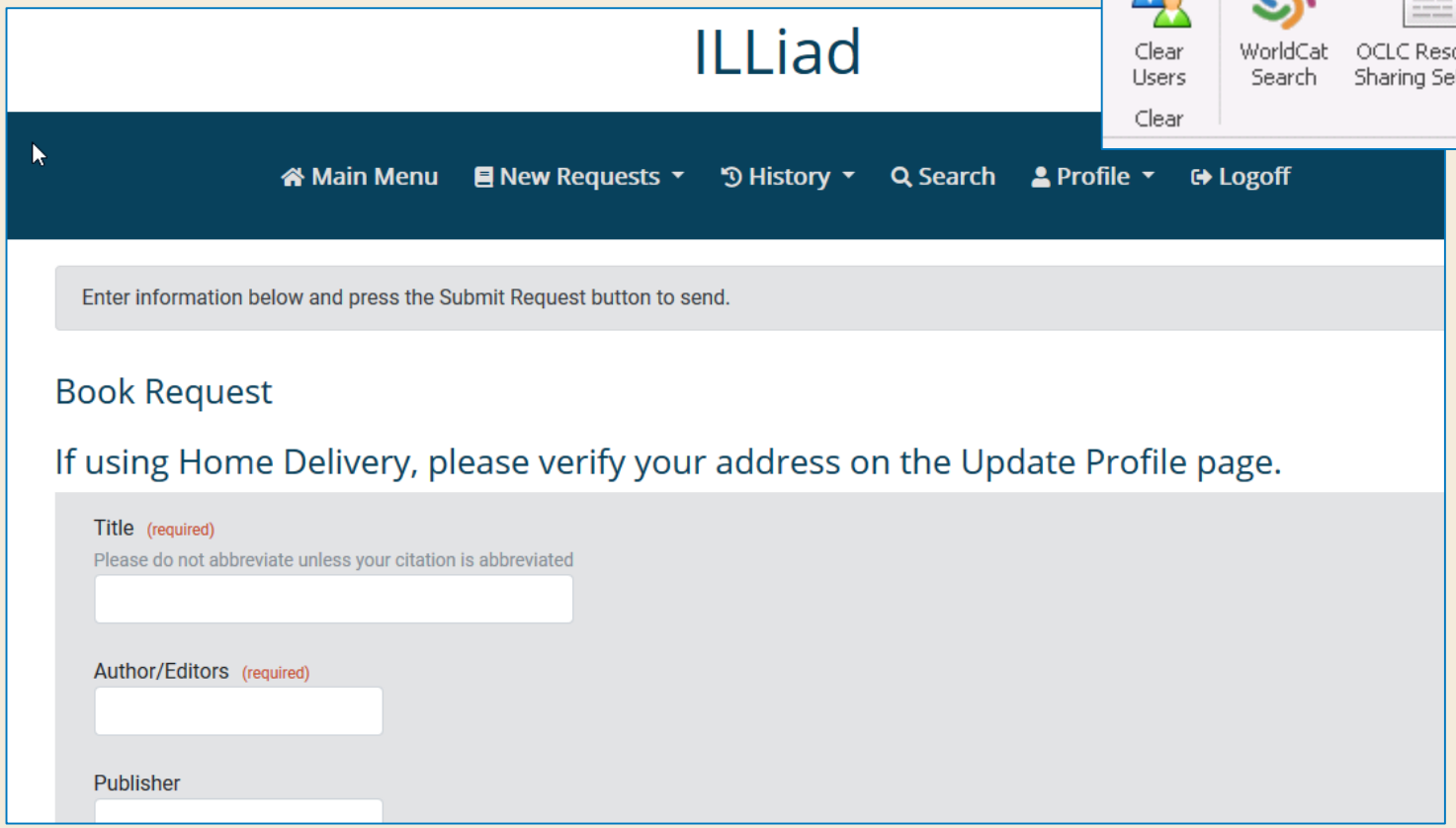




- Default: User sent to **Change User Information** form
- Customize with alternate **Expired User** page
- Customize result for new Cleared status and expiration date
- Verify **Loan Delivery Method** available for selection

# Optional Customization: Web Notice

- Add Web Alert
- Add Heading to Loan Request Form



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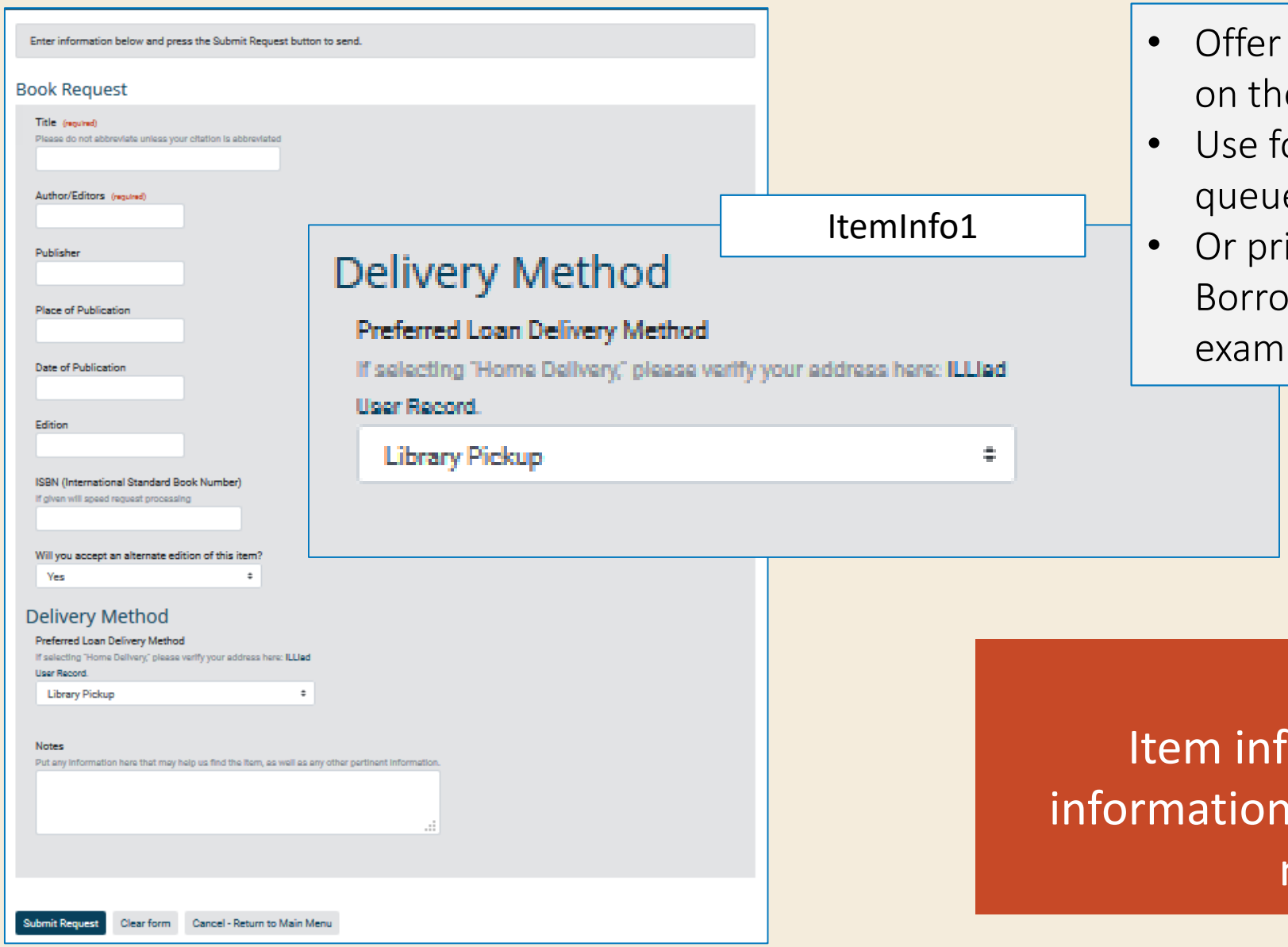
# ALTERNATE WORKFLOWS

# Alternate Workflow: Request Form Option



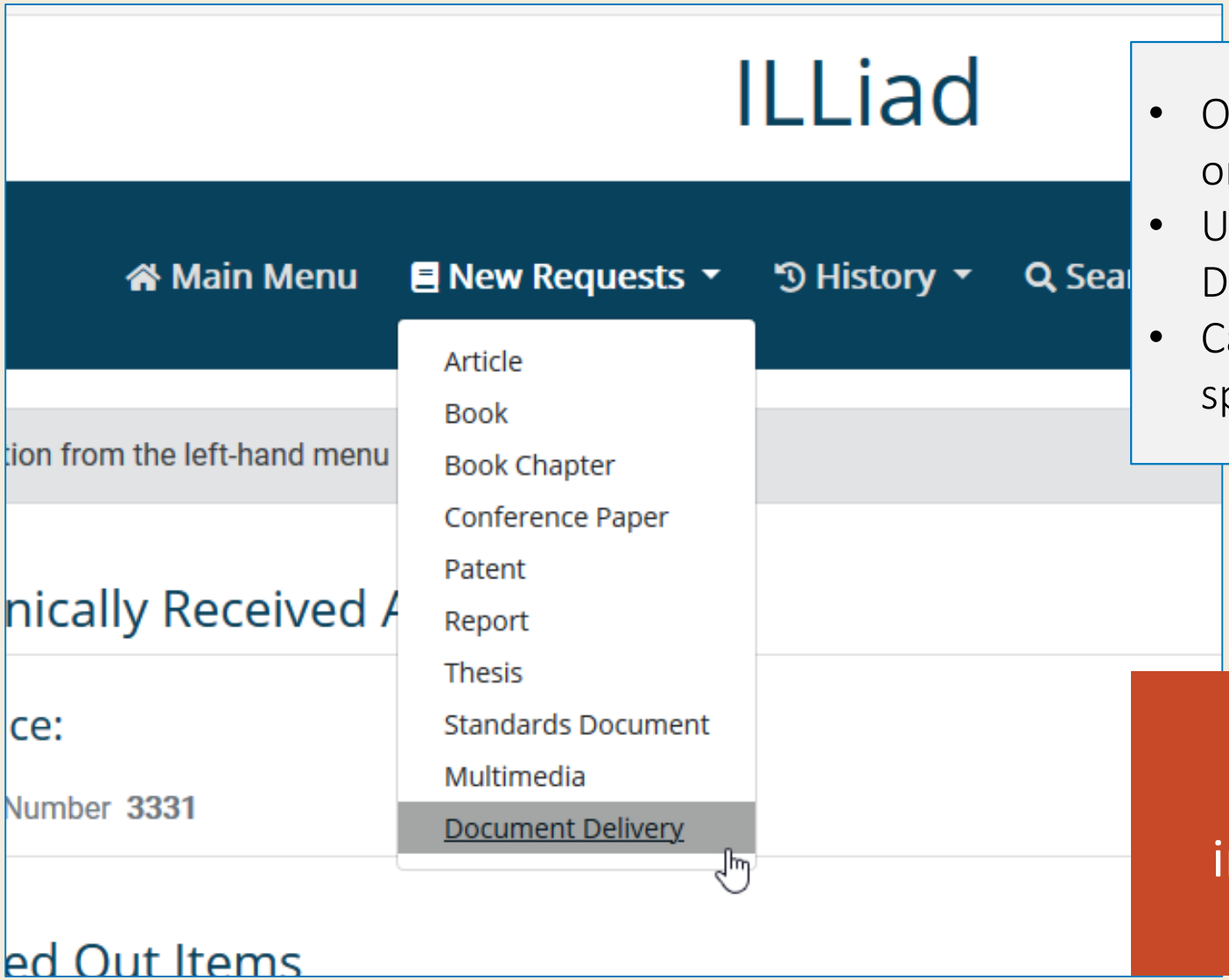

ItemInfo1




- Offer option to receive Home Delivery on the Loan Request form
- Use form selection to route to separate queue for alternative workflow
- Or print Request Form entry on Borrowing Receives template (like example above)

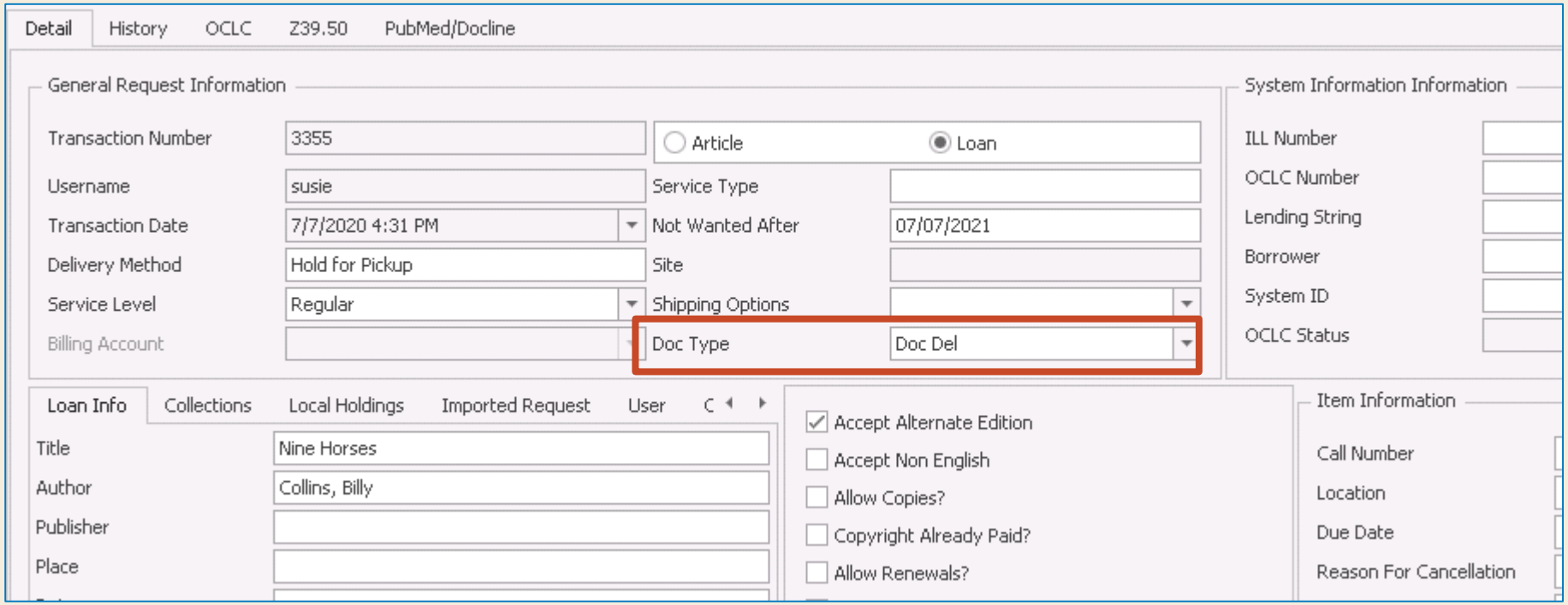
**NOTE:**
Item information not User information—will not affect email notification

# Alternate Workflow: Add Home Delivery Form




- Offer option to receive Home Delivery on a separate, custom request form
- Use Document Type to route to Document Delivery
- Can be customized to offer only to a specific User status such as Faculty

**NOTE:**
Item information not User information—will not affect email notification

# Alternate Workflow: Add Home Delivery Form

```
<div id="content" class="container" role="heading" aria-label="Content">
    <form action="illiad.dll" method="post" name="GenericRequestTesting">
        <input type="hidden" name="ILLiadForm" value="GenericRequestTesting">
        <input type="hidden" name="RequestType" value="Loan">
        <input type="hidden" name="Username" value="<#PARAM name='Username'>">
        <input type="hidden" name="SessionID" value="<#PARAM name='SessionID'>">
        <input type="hidden" name="TransactionNumber" value="<#PARAM name='TransactionNumber'>">
        <input type="hidden" name="ESPNumber" value="<#PARAM name='ESPNumber'>">
        <input type="hidden" name="CallNumber" value="<#PARAM name='CallNumber'>">
        <input type="hidden" name="NotWantedAfter" value="<#PARAM name='NotWantedAfter'>">
        <input type="hidden" name="DocumentType" value="Doc Del">
```