

ILLiad



Home Delivery Options

ILLiad Power-Up Series

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

The screenshot displays a web application interface for user management. The top navigation bar includes a 'Home' tab and a series of icons for user actions: Change Password, Print User, Borrowing, Document Delivery, Cleared, Not Cleared, Blocked, Disavowed, Logon as User, and Web Login Unlocked. Below this is a tabbed interface with 'User Information', 'Requests', 'Accounts', and 'Notifications'. The 'User Information' tab is active, showing a form with fields for User Name (ddistance), Last Name (DistanceEd), First Name (Dolly), ID (98472309), Status (DE Verified), Department (Music), Organization (Y), Email Address (dolly@faraway.com), Phone (971-569-4568), Expiration Date (6/15/2021), Request Limit, Mobile Phone, ILLiad Authentication (checked), Site, Authorized Users, Fax, and Location (MAIN Library). The 'Delivery Methods' section contains a 'Delivery Method' dropdown (Hold for Pickup), a 'Loan Delivery Method' dropdown (Mail to Address, highlighted with a red box), and an 'Electronic Delivery' dropdown (Yes). The 'Notification Preferences' section includes a 'Notification Method' dropdown (Electronic) and checkboxes for 'Account Cleared' and 'Password Reset' under both 'Email Notifications' and 'SMS Notifications'. The 'Local/Mailing Address' section shows fields for Address (65820 Westchester Way), City (Farawaysoclose), State (UT), Zip (82456), and Country. A 'Note' field at the bottom contains the text 'Verified DE'.

Field	Value
User Name	ddistance
Last Name	DistanceEd
First Name	Dolly
ID	98472309
Status	DE Verified
Department	Music
Organization	Y
Email Address	dolly@faraway.com
Phone	971-569-4568
Expiration Date	6/15/2021
Request Limit	
Mobile Phone	
ILLiad Authentication	<input checked="" type="checkbox"/>
Site	
Authorized Users	
Fax	
Location	MAIN Library
Delivery Method	Hold for Pickup
Loan Delivery Method	Mail to Address
Electronic Delivery	Yes
Notification Method	Electronic
Email Notifications - Account Cleared	<input checked="" type="checkbox"/>
Email Notifications - Password Reset	<input checked="" type="checkbox"/>
SMS Notifications - Account Cleared	<input type="checkbox"/>
SMS Notifications - Password Reset	<input type="checkbox"/>
Address	65820 Westchester Way
City	Farawaysoclose
State	UT
Zip	82456
Country	
Note	Verified DE

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

ILLiad Power Up: Home Delivery

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	hblack
7/1/2020 11:38 AM	Customer Notified via E-Mail	hblack

Type	Email Refer...	Email To	Email From	E
Transaction	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.

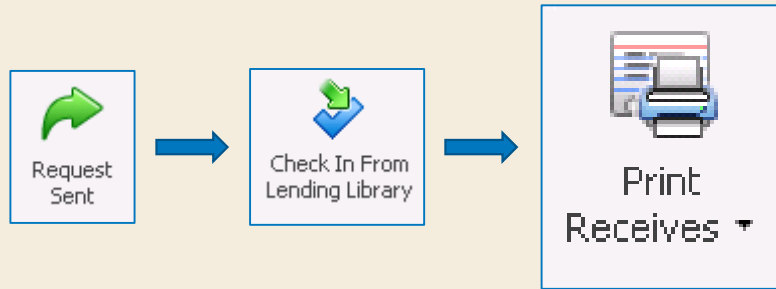
Interlibrary Loan office hours are .

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



Customization Option #1
Modify pull slip with IF/THEN
statement to use same template for both
Delivery Methods



Hold for Pickup



DUE DATE: 8/2/2020

TN: 60

Title: Ghost towns of the West /

Author: Florin, Lambert.

Customer: Dickinson, Emily

Username: dickinson e

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

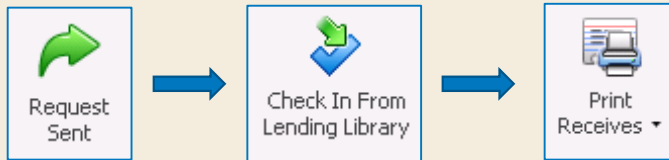
Username: ddistance

Email: dolly@faraway.com

Please Return to:



Workflow: Print Receives



Customization Option #2
Use alternate template for
Mail to Address requests
with Customization Manager
keys and Print Filters

BorrowingPrintReceivesDocsLoan

Settings

Key Value
HomeDelivery.doc,BorrowingLoanLabels.docx

Description
A single document or a list of documents separated by a comma and printed in the client.

Tracking All Sites

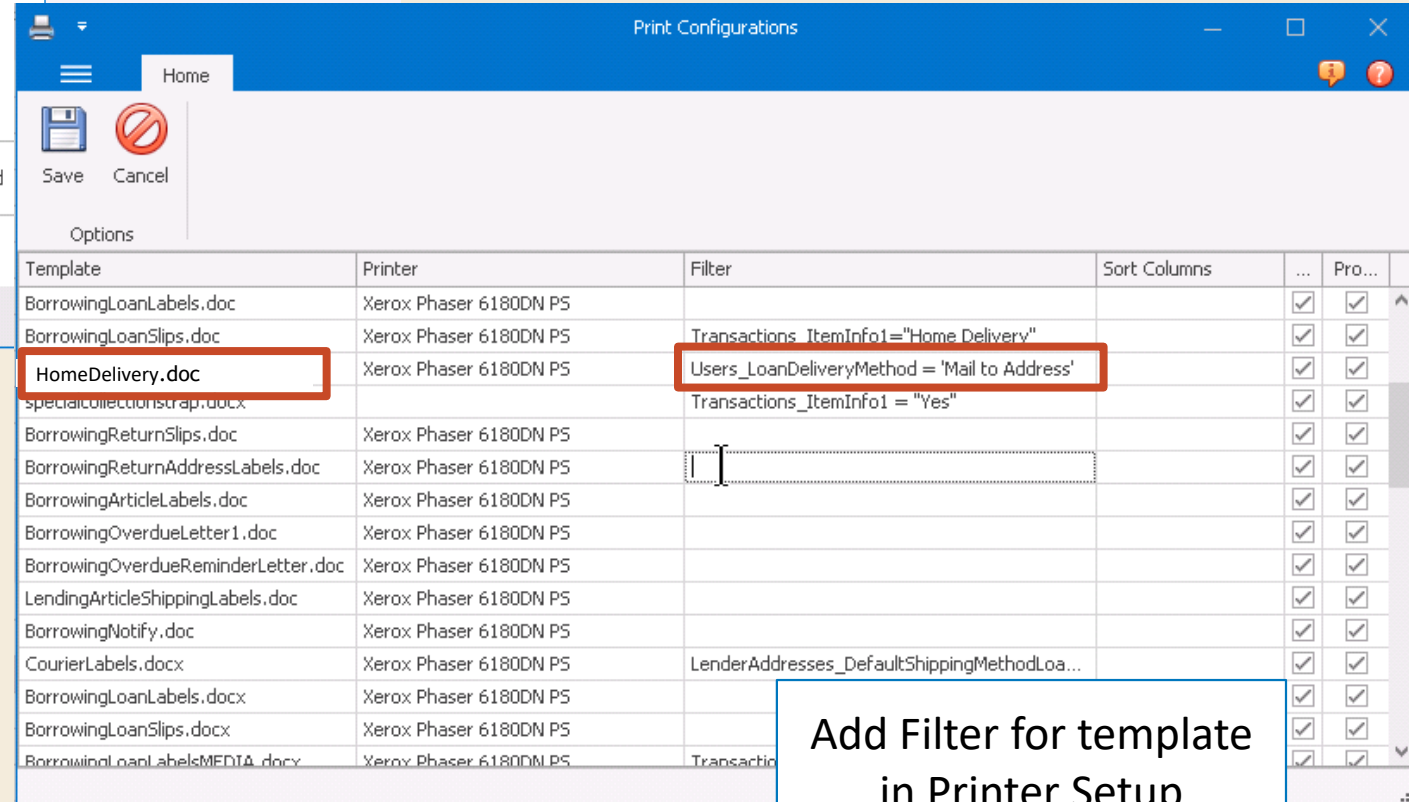
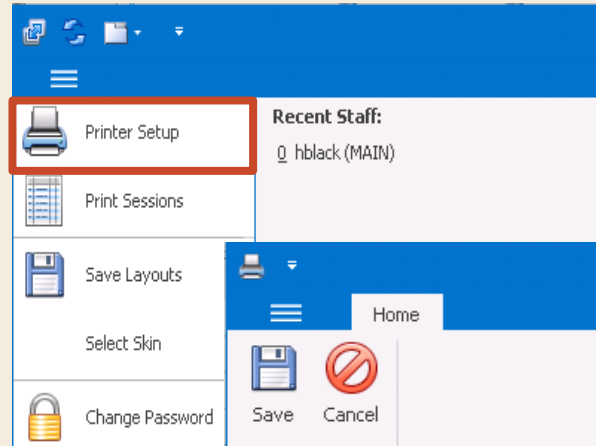
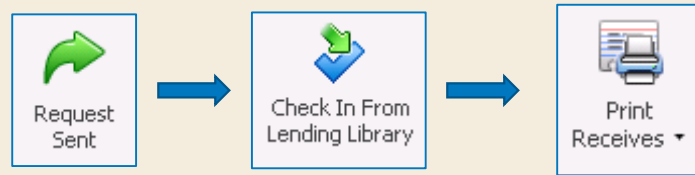
Value Changed From	Value Changed To	NVTGC	Changed Time	Changed By
PrintRequest.doc,Borr...	HomeDelivery.doc,Borr...	MAIN	7/1/2020 12:54 PM	hblack
CheckOut.docx,PrintR...	PrintRequest.doc,Borr...	MAIN	7/1/2020 12:12 PM	hblack
CheckOut.docx,PrintR...	CheckOut.docx,PrintR...	MAIN	2/28/2020 10:27 AM	hblack
CheckOut.docx,PrintR...	CheckOut.docx,PrintR...	MAIN	10/9/2019 11:55 AM	hblack
CheckOutFDA.doc,Prin...	CheckOut.docx,PrintR...	MAIN	6/29/2017 2:42 PM	hblack
CheckOutFDA.doc,Prin...	CheckOutFDA.doc,Prin...	MAIN	6/20/2017 4:36 PM	hblack
CheckOutFDA.doc,Prin...	CheckOutFDA.doc,Prin...	MAIN	6/20/2017 4:29 PM	hblack
BorrowingLoanLabels.d...	CheckOutFDA.doc,Prin...	MAIN	6/13/2017 12:25 PM	hblack
BorrowingLoanLabels.d...	BorrowingLoanLabels.d...	MAIN	5/23/2017 4:55 PM	hblack

[NVTGC] = 'MAIN' Edit Filter

Double-click a tracking row to revert to the previous value.

Add New Template Name

Workflow: Print Receives

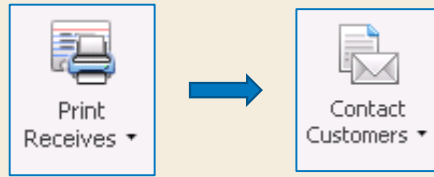


Customization Option #2

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

Add Filter for template in Printer Setup

Workflow: Customer Contact



Customization Option
Edit Notification Message

The screenshot shows the 'Notification Templates' web application. The 'Edit' button in the top navigation bar is highlighted with a red box and a red arrow. The 'Server Addons' tab is also highlighted with a red arrow. The main content area displays the details for the 'ILL Borrowing Loan Delivery' template, including fields for Name, Description, From Name, To Name, CC Address, Subject, and a large text area containing the email body content.

ILL Borrowing Loan Delivery template

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

Template Details

Name: ILL Borrowing Loan Delivery NWTGC MAIN

Description: The notification e-mail text used for loans delivered to customers.

E-mail SMS

From Name: From Address:

To Name: To Address: <#User.EmailAddress>

CC Address: BCC Address:

Subject: Requested Loan Mailed

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

A loan that you had requested:

Title: <#Transaction.LoanTitle>
Author: <#Transaction.LoanAuthor>
TN: <#Transaction.TransactionNumber>

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:

<#User.FirstName> <#User.LastName>
<#User.Address>
<#User.Address2>
<#User.City> <#User.State> <#User.Zip>

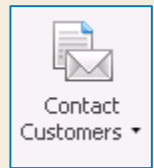
If you do not receive your loan within one week, please let us know.

This item is due back to the library by: <#Transaction.DueDate>.

Interlibrary Loan office hours are <#LocalInfo.BorrowingHours>.

Thank you for using Interlibrary Loan and <#LocalInfo.SystemName>.
Questions and comments regarding Interlibrary Loan policies and procedures may be directed to <#LocalInfo.GeneralEmailAddress>
Our office phone number is <#LocalInfo.GeneralPhone>.
Your phone number is: <#User.Phone>

Check Out to Customer



Manual Check Out

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'

ILLiad Power Up: Home Delivery

DOCUMENT DELIVERY

Doc Del Home Delivery Workflow

The screenshot displays the Document Delivery Processing software interface. The top navigation bar includes 'Document Delivery Processing' and 'Printing'. The main toolbar contains icons for 'Cancel Request', 'Send Delivery Notification', 'Mark Found', 'Mark Found Scan Now', 'Route', 'Route to Borrowing', 'Add Flag', 'Remove Flag', 'Clone to Current', and 'Clone to Another'. The 'Tracking' table shows the following data:

Date Changed	Changed To	Changed By
6/16/2020 12:17 PM	Request Added Through Client	hblack
6/16/2020 12:20 PM	Awaiting Document Delivery Processing	hblack
	Awaiting DD Stacks Searching	hblack
	In DD Stacks Searching	hblack
	Item Found	hblack
	Awaiting Doc Del Customer Contact	hblack
	Doc Del Customer Notified via E-Mail	System
	Request Finished	System

The 'Detail' window shows the following email content:

Dear Dolly DistanceEd

A loan that you requested:

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

was available in the local Libraries and has been processed by the Interlibrary Loan Staff.
As per your instructions to Delivery Express regarding your preferred loan delivery method, it is now in transit to you at 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.



The item is checked out in your name in the online catalog.

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

Request Finished

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


tern State University Document Delivery

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

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

Notification Templates - ILLiad Customization Manager (hblack)

Home Notification Templates

New Edit Copy Save Delete Cancel

Templates Editing

Customization Z39.50 Notification Templates Server Addons DSP Business Rules

Template Details

Name ILL Doc Del Loan Delivery

Description The notification e-mail text used for Doc Del loans delivered to customers.

E-mail SMS

From Name From Address

To Name To Address <#User.EmailAddress>

CC Address BCC Address

Subject Requested loan has arrived

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

A loan that you requested:

Title: <#Transaction.LoanTitle>
Author: <#Transaction.LoanAuthor>
TN: <#Transaction.TransactionNumber>

was available in the local Libraries and has been processed by the Interlibrary Loan Staff.
As per your instructions to <#LocalInfo.SystemName> regarding your preferred loan delivery method, it is now in transit to you at the following address:

<#User.FirstName> <#User.LastName>
<#User.Address>
<#User.Address2>
<#User.City> <#User.State> <#User.Zip>

If you do not receive your loan within one week, please let us know.

The item is checked out in your name in the online catalog.

Interlibrary Loan office hours are <#LocalInfo.BorrowingHours>.

Thank you for using Interlibrary Loan and <#LocalInfo.SystemName>.
Questions and comments regarding Interlibrary Loan policies and procedures may be directed to <#LocalInfo.GeneralEmailAddress>
Our office phone number is <#LocalInfo.GeneralPhone>.
Your phone number is: <#User.Phone>

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

ILLiad Power Up: Home Delivery

MANAGING USER RECORDS

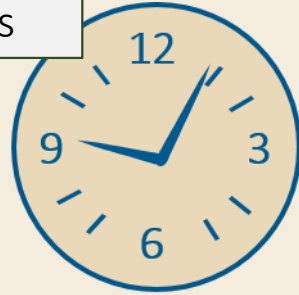
User Expiration

- 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

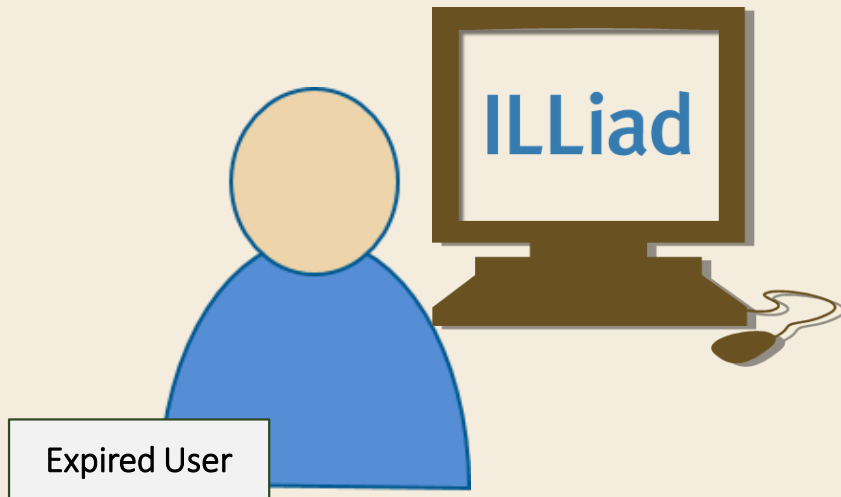
A screenshot of a web application window titled "dhal - User". The interface shows a user profile for "dhall" with fields for User Name, Last Name, First Name, ID, Number, Status, Department, Organization, Site, Email Address, Phone, Mobile Phone, Fax, Location, Expiration Date (7/7/2012), Request Limit, and ILLiad Authentication. There are also sections for Delivery Methods and Notification Preferences.

User Information		Requests	Accounts	Notifications			
Details							
User Name	dhall	Status	Faculty	Email Address	dhall@ashiondx.com	Expiration Date	7/7/2012
Last Name	Hall	Department		Phone	879-298-2983	Request Limit	
First Name	Don	Organization		Mobile Phone		ILLiad Authentication	<input checked="" type="checkbox"/>
ID	203948	Site		Fax			
Number		Authorized Users		Location	MAIN Library		
Delivery Methods					Notification Preferences		
Delivery Method	Hold for Pickup	Loan Delivery Method	Mail to Add	Electronic Delivery	Yes	Notification Method	Electronic
Local/Mailing Address		Other/Notification Address					
Address		456 County Rd 228					
City		Windehame					
State		NH					
Country		Zip 02983					

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

Expired User Login

- User prompted to update information



ILLiad

Home Main Menu New Requests History Search Profile Logoff

When finished editing, press the Submit Request button below.

Update Profile

It's been awhile since we asked, so please verify your contact information. Thank you!

User Information

First Name (required)

Last Name (required)

ID Number (required)

E-Mail Address (required)

Daytime Phone (required)

Mobile Phone

Department

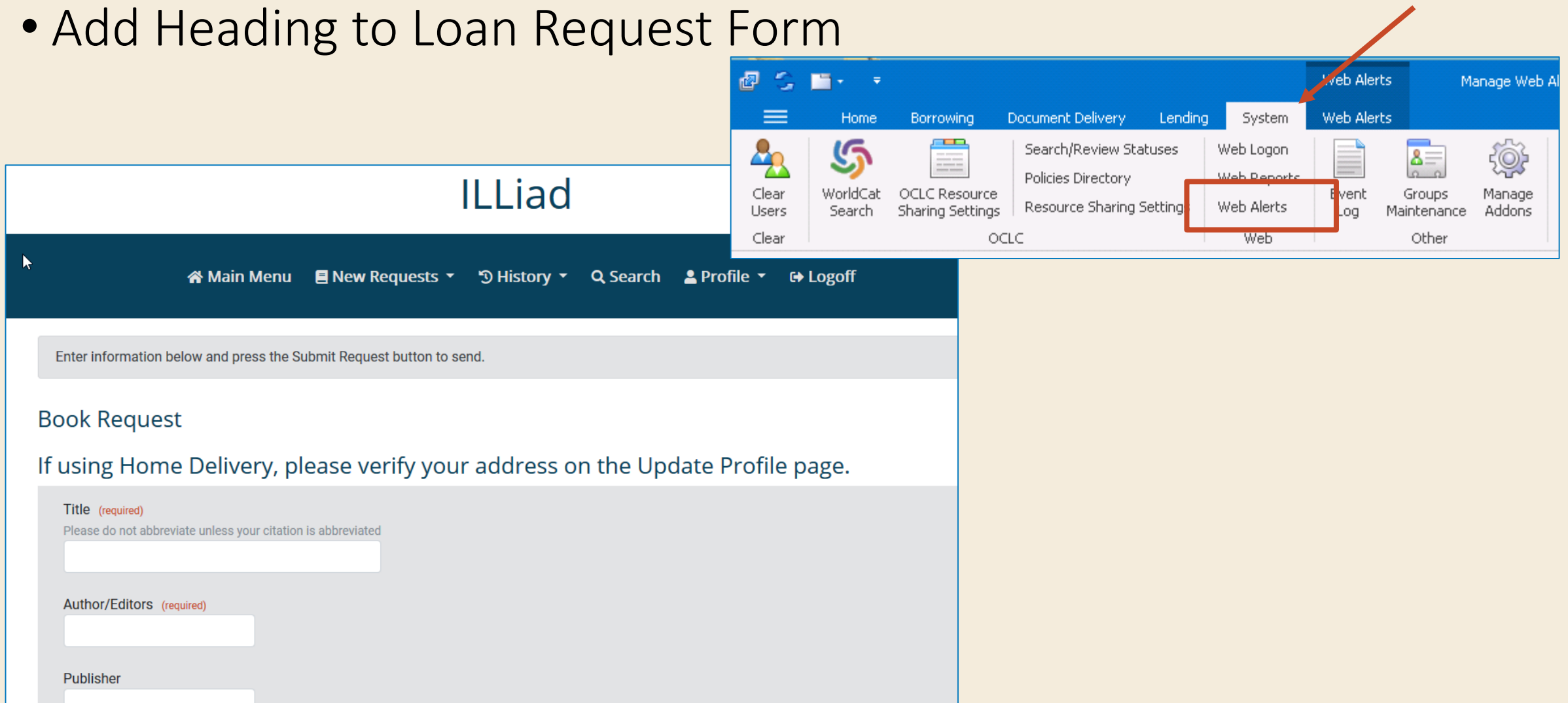
Status (required)

Delivery Location

- 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



The screenshot displays the ILLiad web interface. At the top, the 'ILLiad' logo is visible. Below it is a navigation bar with links for 'Main Menu', 'New Requests', 'History', 'Search', 'Profile', and 'Logoff'. The main content area is titled 'Book Request' and includes a note: 'If using Home Delivery, please verify your address on the Update Profile page.' Below this, there are input fields for 'Title (required)', 'Author/Editors (required)', and 'Publisher'. An inset window in the top right corner shows the system's administrative menu, where the 'Web Alerts' option is highlighted with a red box and a red arrow points to it.

ILLiad

Home Borrowing Document Delivery Lending System Web Alerts Manage Web Al

Clear Users WorldCat Search OCLC Resource Sharing Settings Search/Review Statuses Policies Directory Resource Sharing Setting Web Logon Web Reports Event Log Groups Maintenance Manage Addons

Main Menu New Requests History Search Profile Logoff

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

Book Request

If using Home Delivery, please verify your address on the Update Profile page.

Title (required)
Please do not abbreviate unless your citation is abbreviated

Author/Editors (required)

Publisher

ILLiad Power Up: Home Delivery

ALTERNATE WORKFLOWS

Alternate Workflow: Request Form Option

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

Book Request

Title (required)
Please do not abbreviate unless your citation is abbreviated

Author/Editors (required)

Publisher

Place of Publication

Date of Publication

Edition

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

Will you accept an alternate edition of this item?
Yes

Delivery Method

Preferred Loan Delivery Method
If selecting "Home Delivery," please verify your address here: ILLiad
User Record.

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

Submit Request **Clear form** **Cancel - Return to Main Menu**

ItemInfo1

Delivery Method

Preferred Loan Delivery Method

If selecting "Home Delivery," please verify your address here: ILLiad
User Record.

Library Pickup

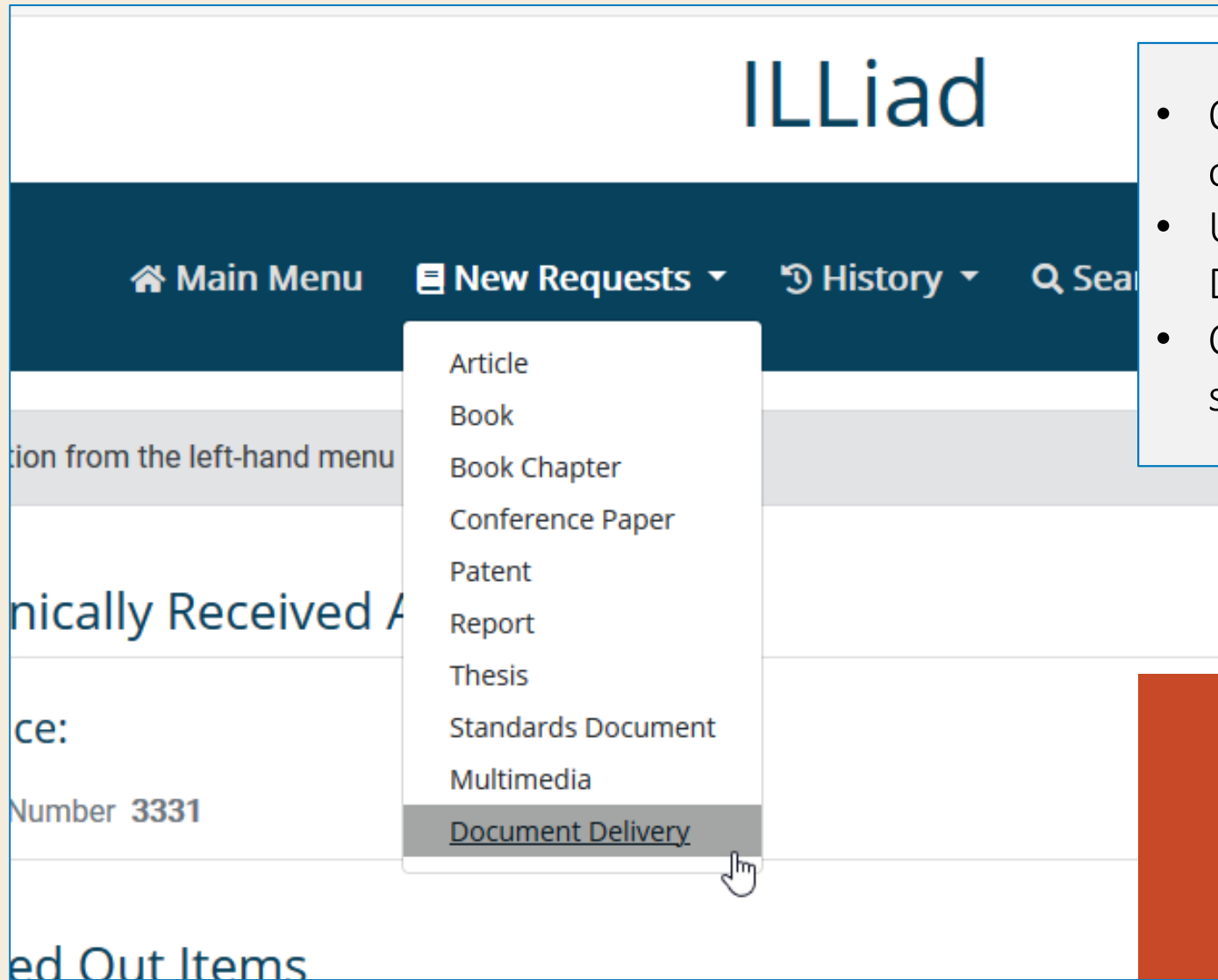
- Offer option to receive Home Delivery on the Loan Request form
- Use form selection to route to separate queue for alternative workflow
- Or print Request Form entry on Borrowing Receives template (like example above)

NOTE:

Item information not User
information—will not affect email
notification



Alternate Workflow: Add Home Delivery Form



The screenshot shows the ILLiad web interface. At the top, the title 'ILLiad' is displayed. Below it is a dark blue navigation bar with links for 'Main Menu', 'New Requests', 'History', and 'Search'. The 'New Requests' dropdown menu is open, showing a list of document types: Article, Book, Book Chapter, Conference Paper, Patent, Report, Thesis, Standards Document, Multimedia, and Document Delivery. The 'Document Delivery' option is highlighted with a mouse cursor. On the left side of the page, there is a section titled 'Technically Received A' and another section with the text 'ce: Number 3331'. At the bottom left, the text 'ed Out Items' is visible.

- 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">
```

Detail	History	OCLC	Z39.50	PubMed/Docline
General Request Information				
Transaction Number	3355	<input type="radio"/> Article <input checked="" type="radio"/> Loan		
Username	susie	Service Type		
Transaction Date	7/7/2020 4:31 PM	Not Wanted After	07/07/2021	
Delivery Method	Hold for Pickup	Site		
Service Level	Regular	Shipping Options		
Billing Account		Doc Type	Doc Del	
System Information Information				
ILL Number				
OCLC Number				
Lending String				
Borrower				
System ID				
OCLC Status				
Loan Info				
Title	Nine Horses			
Author	Collins, Billy			
Publisher				
Place				
<input checked="" type="checkbox"/> Accept Alternate Edition				
<input type="checkbox"/> Accept Non English				
<input type="checkbox"/> Allow Copies?				
<input type="checkbox"/> Copyright Already Paid?				
<input type="checkbox"/> Allow Renewals?				
Item Information				
Call Number				
Location				
Due Date				
Reason For Cancellation				