

ILLiad

ILLiad Projects—Part 1
Ideas for Coronavirus Service Interruptions

ATLAS SYSTEMS
TRAINING & SUPPORT SOLUTIONS

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Time to Sharpen the Axe

- Session 1—Clean Up Projects
- Session 2—Workflow Improvement

High-Level Overview
See Handout for
Documentation Links




Photo by [Malte Wingen](#) on [Unsplash](#)

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Agenda

- Stale Request Review
- Special Messages
- Connection Manager Errors
- Conditional Messages
- Cancellations Messages
- Custom Queues
- Default Email Templates
- Custom Email Routing
- System Routing Rules
- Custom Holdings Groups & Paths
- Update User Information
- Lender Address Record Clean-Up
- Q&A

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ILLiad Projects for Coronavirus Service Interruptions

REQUEST PROCESSING CLEAN-UP

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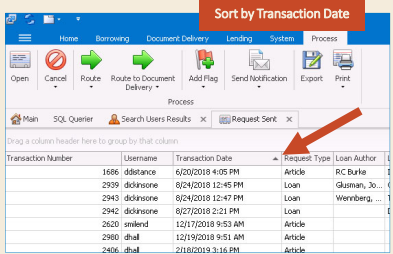
Stale Request Queues

- Review queues for old or misdirected requests
 - Lending
 - Item Shipped
 - In Stacks Searching
 - Awaiting Odyssey Scanning
 - Borrowing
 - Request Sent
 - Doc Del
 - Doc Del
 - In DD Stack Searching
 - Awaiting DocDel Scanning

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Stale Request Queues

- Check OCLC request status
- Sort by Transaction Date
- Re-order Borrowing request if "Need Before" date is still valid



Transaction Number	Username	Transaction Date	Request Type	Loan Author
1686	ddistance	6/20/2018 4:05 PM	Article	RC Burke
2939	ddistance	8/24/2018 12:45 PM	Loan	Gusman, Jo...
2943	ddistance	8/24/2018 12:47 PM	Loan	Wienberg, ...
2942	ddistance	8/27/2018 2:21 PM	Loan	
2620	smilend	12/17/2018 9:53 AM	Article	
2960	dhall	12/19/2018 9:51 AM	Article	
2406	dhall	2/18/2019 3:16 PM	Article	

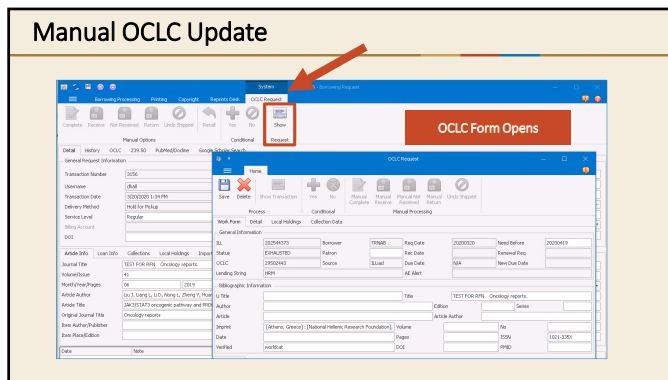
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Special Messages

- Requests flagged by OCLC system
 - Indicates *potential* delivery issue
 - Removed when OCLC request is updated
 - Requests eventually age off the system
- Review History
 - Verify return or delivery with partner library
 - Check Shelves
 - Run Electronic Delivery manually
- Update OCLC if need be
 - Bug in 9.0 when using Manual updating

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Manual OCLC Update



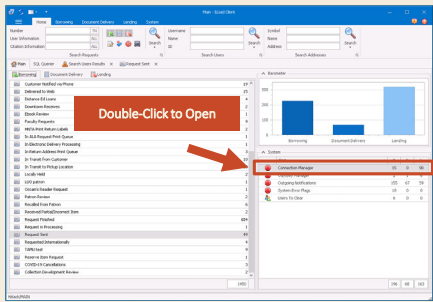
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Connection Manager Errors

- Indicates mis-match of OCLC status and ILLiad status
- Research the history
 - Where was the ILLiad processing step missed?
 - Verify current item status
 - Helpful to know OCLC statuses and workflow
- Follow up with partner library if need be
- Remove flag if "All's Well"
- May indicate training or processing issue

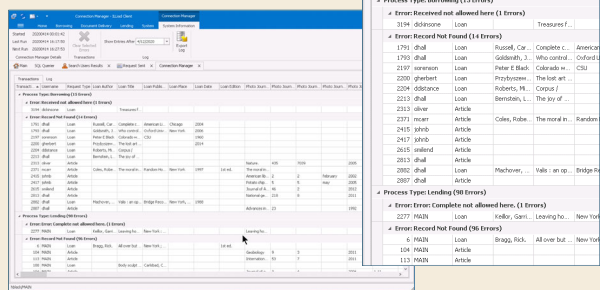
9

Connection Manager Errors



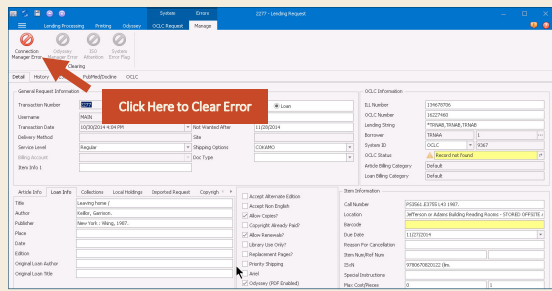
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Connection Manager Errors



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Connection Manager Errors



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ILLiad Projects for Coronavirus Service Interruptions

CUSTOMIZATION MANAGER CLEAN-UP

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Conditional Messages—Lending

- Review that all messages are in use
 - Add new messages if needed
- Delete those not used
 - Be sure to maintain number order
- Re-order by frequency of use

Reason Number	WFOC	Reason	Default State
0	PRN	Checked out	
1	PRN	Non-availability	
2	PRN	Exceeds loan cost	We charge \$10 for first 10 pages, \$0.10 for each additional page.
3	PRN	Overdue	
4	PRN	Not on shelf	
5	PRN	Item not owned	
6	PRN	Holdings less than 100% of the volume	
7	PRN	Holdings less than 10% of the volume	
8	PRN	Out of stock	
9	PRN	Lock released	

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Cancellations Messages

- Review that all messages are in use
 - Verify applicable to Borrowing and/or Lending
 - Double check OCLC or DOCLINE codes
- Delete those not used
- Re-order by frequency of use
- Add new messages if needed
- Be sure to maintain number order

> Borrowing
 > Cancellations
 > ReasonsForCancellation

> Lending
 > Cancellations
 > Lending ReasonsForCancellation

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Reason for No for Current Closures

ReasonNumber	NTISQ #	Reason	DefaultRate	OCLCCode	DocletCode
0	PA2N	Checked Out	1		LOE
1	PA2N	Item not available	4		non-etc
2	PA2N	Exceeds max cost	10		OST
3	PA2N	On order	6		OSD
4	PA2N	Not as cited	17		
5	PA2N	Title not issued	5		
6	PA2N	Holdings IND BEFORE the volume	5		
7	PA2N	Holdings BEGIN AFTER the volume	9		
8	PA2N	All orders	6		
9	PA2N	Lack of reference	5		
10	PA2N	Issue not yet received	6		
11	PA2N	Lost	2		
12	PA2N	Not on shelf	10		
13	PA2N	Exceeds copy limits	27		
14	PA2N	Other	27		
15	PA2N	On file	30		other
16	PA2N	Processing complete			OTH
17	PA2N	COVID-19 service closure	24		OTH
18	PA2N	On Reserve	11		

OCLC Code 24 =
Preferred Delivery Time Not Possible

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Custom Queues

- Review list of custom queues from a request of each type
 - Route—green arrow icon 
- Delete those not used
- Add new messages, if needed

> System
> CustomQueues
> CustomQueues

★ Quick Tips

- Sort by Process Type to view Custom Queues together for that type
- Add numbers before name to order by frequency of use.

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Custom Queues

Click Here to Sort by Process Type 

QueueName	ProcessType	NTISQ #
01 Collection Development Review	Doc Del	PA2N
Acquisitions Review	Doc Del	PA2N
Distance Ed Processing	Doc Del	PA2N
HEA New Requests	Doc Del	PA2N
HEA Patron Loans	Doc Del	PA2N
Home Delivery Request	Doc Del	PA2N
Ordered from Doc Provider	Doc Del	PA2N
Purchase Review - Unfilled	Doc Del	PA2N
Request for Purchase	Doc Del	PA2N
Awaiting Conditional Request Processing	Lending	PA2N
Awaiting Exam Processing	Lending	PA2N
Awaiting ILL Request Processing	Lending	PA2N
Awaiting Lending Request Processing	Lending	PA2N
Awaiting Renewal Request Processing	Lending	PA2N
Awaiting ILL Request Processing	Lending	PA2N

The screenshot shows the OCLC Request interface. On the left, there is a list of custom queues sorted by process type. A red arrow points to the 'CustomQueues' column header. On the right, a detailed view of a request is shown. A red box highlights the 'Custom Queues Listed by Frequency of Use' section, which lists various queue names with checkboxes for selection.

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Default Email Templates

- Review and update language of primary templates
- Identify template for each process step with documentation

> Notification Templates Tab
> Edit Button

★ Quick Tip
Include updated COVID-19 related information on article template

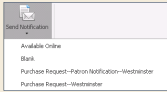
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Custom Email Routing

- Review list from **Send Notification** on a request of each type
- Delete those not used
- Edit template language
- Add new messages if needed
- Re-order by frequency of use

> System
> EMail
> EMailRouting

> Notification Templates Tab
> Edit Button



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Email Templates

CAUTION!
Do not delete default templates
Consult documentation
before deleting any templates

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System Routing Rules

- Sort by **RuleActive** to verify which rules are active
 - Delete inactive rules that you don't foresee using again
 - Test rules that are active
- Sort by **TransactionStatus** to verify processing order with multiple rules on the same status
- Add descriptions to those without one or complete details

> System
> Routing
> Routing

★ Quick Tip
Add note in description that rule was reviewed with your initials

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Custom Holdings Groups & Paths

- As of ILLiad 9.1, modify in OCLC Service Configuration
- Update Custom Holdings Groups
 - Review symbols verify library still meets status qualifications
 - Look up individual library policies in the Policies Directory
- Evaluate Custom Holdings Paths for efficiency
- Remove paths and groups not in use

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Custom Holdings Groups via Policies Directory

The screenshot shows the OCLC Policies Directory search results. A search for 'American University of Sharjah' has been performed, yielding several results. The first result is highlighted with a red box. The interface includes a search bar, filters, and a table of results with columns for Institution Information, OCLC Symbol, and various status/holdings data.

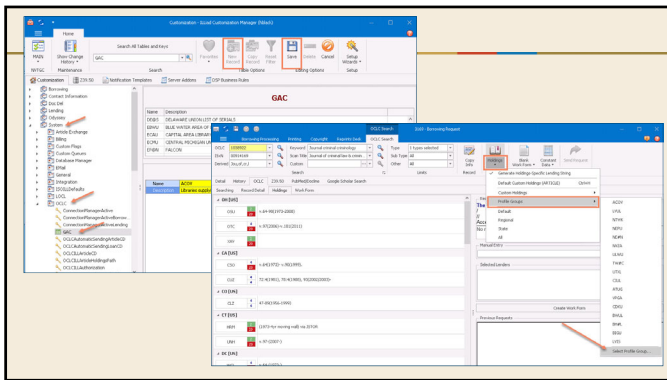
★ Quick Tip
Use Profile Groups from the Policies directory to create new groups

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New Profile Groups

- **ACOV**—Libraries supplying **electronic documents or articles** during the COVID-19 crisis
 - This is a new Profile Group.
- **BCOV**—Libraries supplying **electronic books** during the COVID-19 crisis.
 - This is a new Profile Group.
- **EBOOK**—Libraries supplying **full ebooks**

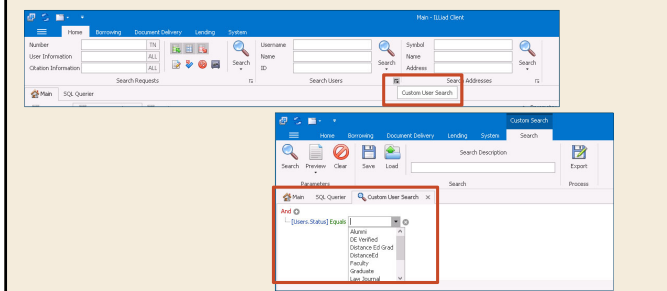
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Update User Information

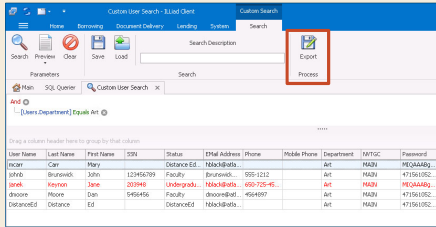
- Use Custom Search options to identify record for clean-up



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Update User Information

- Export to Excel for checklist if needed

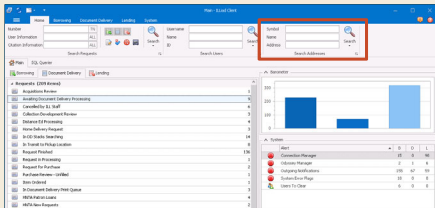


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Lender Address Record Clean-Up

- Search for all lender addresses
 - Leave search blank and click **Search** button in the **Search Address** group

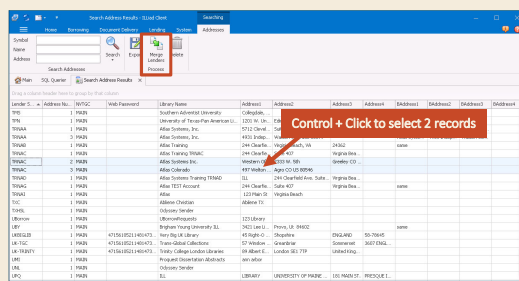


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Lender Address Record Clean-Up

- Identify duplicates and merge records



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ILLiad Projects during Coronavirus Closures—Part 1

Documentation Links

Stale Request Processing

<http://idsproject.libanswers.com/faq/142539>

Special Message Flags

<https://support.atlas-sys.com/hc/en-us/articles/360011911633-OCLC-Special-Messages>

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Reference/Request_Aging

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Reference/Categories_and_queues

Connection Manager Errors

<https://support.atlas-sys.com/hc/en-us/articles/360011809854-Connection-Manager-Errors>

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Reference/Categories_and_queues

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Training

Conditional Messages

<https://support.atlas-sys.com/hc/en-us/articles/360011808774-Reasons-for-Conditional>

Cancellation Messages

<https://support.atlas-sys.com/hc/en-us/articles/360011809014-Borrowing-Reasons-for-Cancellation>

<https://support.atlas-sys.com/hc/en-us/articles/360011909053-Lending-Reasons-for-Cancellation>

Custom Queues

<https://support.atlas-sys.com/hc/en-us/articles/360011808954-Creating-Custom-Queues>

Custom Email Routing & Template Editing

<https://support.atlas-sys.com/hc/en-us/articles/360011908053-Adding-Email-Routing-Rules>

<https://support.atlas-sys.com/hc/en-us/articles/360011908033-Creating-Email-Routing-Templates>

<https://support.atlas-sys.com/hc/en-us/articles/360011907933-Creating-and-Editing-Email-Templates>

<https://support.atlas-sys.com/hc/en-us/articles/360011907973-Default-ILLiad-Email-Templates>

System Routing

<https://support.atlas-sys.com/hc/en-us/articles/360011908893-Configuring-Routing-Rules>

Custom Holdings Groups & Paths

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Service_Configuration_Settings/040Custom_Holdings_Groups

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Service_Configuration_Settings/050Custom_Holdings_Paths

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Service_Configuration_Settings

[Adding New Profile Groups to Customization Manager](#)

Update User Information

<https://support.atlas-sys.com/hc/en-us/articles/360011911253-Custom-Searching>

Lender Address Record Clean-Up

<https://support.atlas-sys.com/hc/en-us/articles/360011812154-Merging-Address-Records>