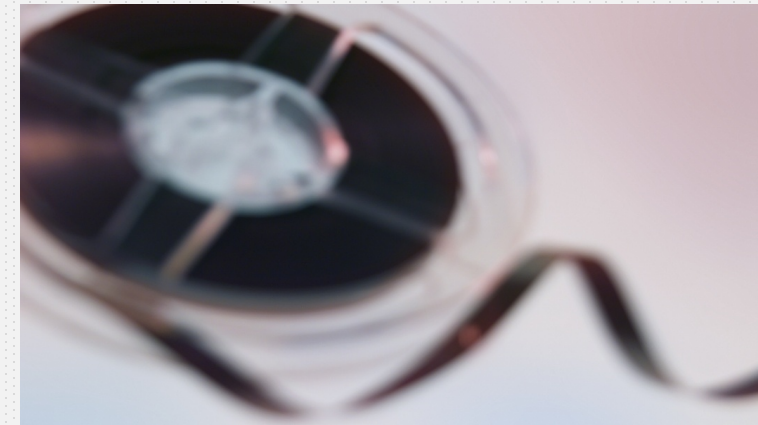


Atlas Systems **MakerSpace**

Implementing the Decision Support Pipeline
HathiTrust Addon

Housekeeping

- Zoom Webinar
 - Only presenters & panelists can talk and share video.
 - Please use chat or Q & A and we'll do our best to answer questions.
 - We are recording! This session will be made available for later viewing in the Atlas Video Training Library.
 - training.atlas-sys.com
 - This session will last 60 – 90 minutes.



Welcome!

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Director of Special Projects

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@geniealisa



DSP Overview

- Available in ILLiad 9.1 (released December 2019)
- Borrowing/Doc Del module only currently
- Uses server addons specific to DSP workflows
- Can be set to allow staff to review request or automatically process requests
- Seven addons available now
- New addons coming over time with your feedback

HathiTrust

- Searches for request in HathiTrust by OCLC number or ISSN/ISBN
- Confirms item is available for your site
- Sends email to user with link to that item
- Otherwise routes to request processing

HathiTrust Config

- You need to get a list of your holdings from HathiTrust. Generally, this is a zip file of a text file including the OCLC number for each item available.
- Your HathiTrust addon needs to be customized for your site with this OCLC number information.
- Needs an email template for delivering the link to the user
- If not available in HathiTrust, needs business rule to move on to the next step you'd prefer.

Requires ILLiad Client 9.1.3.0

- The Decision Support Pipeline will now generate recommendations for transactions regardless of whether or not fulfillment data has been generated. Also, if a fulfillment source hasn't been identified by a DSP addon(s), a transaction can now be automatically routed to a specific DSP queue. To enable this functionality, the "Queue" business rule must be placed after any other "Addon" or "System" business rules for the pipeline.
- Previously, a business rule with a target type of "Queue" would only lead to a recommendation under the following circumstances:
 1. The transaction matched the business rule.
 2. No previous business rule in the pipeline had generated a recommendation.
 3. At least one addon generated fulfillment data for the transaction.

HathiTrust Addon Setup

```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.14393]
(c) 2016 Microsoft Corporation. All rights reserved.

C:\Users\atlastest>cd\

C:\>cd illiad

C:\illiad>Atlas-HathiTrust-OCN-Parser.exe -i c:\illiad\hathitrust_sample.tsv -o c:\illiad\oclc.txt
Parsing input file...
2385545 available records found.
Writing to output file.
Done.

C:\illiad>_
```


HathiTrust Addon Setup

Name: ILLiad HathiTrust DSP Addon

Author: Atlas Systems, Inc.

Version: 1.1.1

NVTGC: APPLE

Active: Yes No

Description: Checks HathiTrust for item availability, and delivers links if available.

Settings		Decision Support Pipelines	
Setting Name	Value	Type	Description
EtasActive	<input checked="" type="checkbox"/>	boolean	Whether or not your institution is using the Emergency Temporary Access Service. If true, all items will be considered available, even if they are normally Limited-Access.
EtasOcnFile	odc.txt	string	Name of the file listing the OCLC numbers to which your institution has access. Must be included in the addon ZIP file. See README for instructions.
StrictItemTypeMatching	<input checked="" type="checkbox"/>	boolean	If true, staff review will be required for any item which is not explicitly a monograph. If false, staff review will only be required for items which are explicitly serials.
HathiTrustUrlField	Location	string	Name of the field on the Transactions form where the URL will be saved.
ProxyPrefix	https://babel.hathitrust.org/cgi/wayf?target=	string	If supplied, this prefix will be added to any links delivered to patrons.
DeliveryEmailTemplate	HathiTrust	string	Name of the delivery email template to be used to deliver the link.
DeliveredQueue	Request Finished	string	Name of the queue that requests will be routed to when a link is found and delivered.

Settings | Decision Support Pipelines

Supported Pipelines

Borrowing Article Pre-Copyright

Borrowing Article

Borrowing Loan

Hands On!

- Create custom queues for manual routing
- Create routing rules to move items to pipeline
- Create delivery email template
- Add oclc.txt file to HathiTrust addon
- Configure HathiTrust addon
- Create a business rule for Loans
- Create a “queue” business rule for items not filled

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Atlas Systems, Inc.


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Atlas Systems partners with libraries, archives, museums, and information repositories of all kinds to facilitate and promote collection visibility and access. Together we create products and services that support efficient workflows allowing information professionals to spend more time focusing on the needs of their users.


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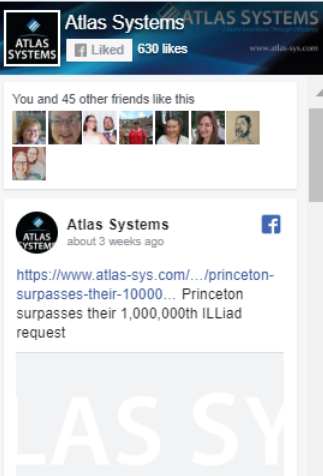
- 

WED, MAR 4 2:00 PM
ILLiad Power Up: Decision Support Pipeline
FREE #Class
- 

TUE, MAR 10 1:00 PM
ILLiad Innovation Lab: Business Rules and Decision Support Pipeline
\$500 #Class
- 

TUE, MAR 24 1:00 PM
Ares Power Up: Increasing Efficiency with Custom Print Templates
FREE #Class
- 

WED, MAR 25 2:00 PM



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about 3 weeks ago

<https://www.atlas-sys.com/.../princeton-surpasses-their-10000...> Princeton surpasses their 1,000,000th ILLiad request

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Important Update Information Release Date: 20 M...

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Heather Black
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