

ILLiad New User Club

Spring Cleaning:
queues, grid layouts, and flags



**ATLAS
SYSTEMS**

Library Excellence Through Efficiency

ILLiad New User Club – Spring Cleaning

QUEUES

Queue Order

The screenshot shows the ILLiad Client interface. At the top, there are navigation tabs: Home, Borrowing, Document Delivery, Lending, and System. Below these are search fields for Requests, Users, and Addresses. The main area is divided into sections: a list of request statuses, a Barometer chart, and a summary table.

Requests (1125 items)

Status	Count
Awaiting Lending Request Processing	10
Request Finished	559
Request Conditionalized	25
Odyssey Sending Failed	7
My Special Lending Friends	15
Item Shipped Internationally	
Item Shipped	
International Requests	
In Stacks Searching	
In Remote Storage Retrieval	
HSL Shipping	
Cancelled via Lending Web	
Cancelled by ILL Staff	195
Awaiting Renewal Request Processing	10
Awaiting Lending Scanning	31
Awaiting EJournal Processing	4
Awaiting Conditional Request Processing	8
Awaiting Cancellation Review	10
Awaiting Article Exchange Notification	6
Aeon Request Sending Failed	4
OCLC Special Message: Complete?	4

Barometer

The Barometer chart shows the distribution of requests across different stages. The Y-axis ranges from 100 to 250. The X-axis is labeled 'Lending'. The chart shows a bar for 'Lending' with a value of 243. Other values shown are 266 and 70.

Summary Table

	B	D	L
	17	0	14
Odyssey Manager	0	0	4
Outgoing E-Mail	190	49	31
System Error Flags	6	0	0
Users To Clear	2	0	0

Navigation and Search

Home Borrowing Document Delivery Lending System

Number ALL
User Information ALL
Citation Information ALL

Search Requests

Username
Name
ID

Search Users

Symbol
Name
Address

Search Addresses

Main

Borrowing Document Delivery Lending

layout

Organize the list for your processing priorities

- Click and drag queue to the place desired
- Queue returns to that place in the list when new requests move to that status

Queue Categories

The screenshot displays a library system interface with three overlapping windows. The leftmost window shows a list of queue categories under 'Requests (1125 items)'. The middle window shows the same list with a context menu open over the 'Cancelled by ILL Staff' item. The rightmost window shows a detailed view of the 'Cancelled by ILL Staff' queue, listing individual items and their counts.

Queue Categories (Left Window):

- Awaiting Lending Request Processing
- Request Finished
- Request Conditionalized
- Odyssey Sending Failed
- My Special Lending Friends
- Item Shipped Internationally
- Item Shipped
- International Requests
- In Stacks Searching
- In Remote Storage Retrieval
- HSL Shipping
- Cancelled via Lending Web
- Cancelled by ILL Staff
- Awaiting Renewal Request Processing
- Awaiting Lending Scanning
- Awaiting EJournal Processing
- Awaiting Conditional Request Processing
- Awaiting Cancellation Review
- Awaiting Article Exchange Notification
- Aeon Request Sending Failed
- OCLC Special Message: Complete?

Context Menu (Middle Window):

- Reset To Default View
- Add to New Category
- Hide this Queue

Cancelled by ILL Staff Queue Details (Right Window):

Request Finished	559
Request Conditionalized	25
Odyssey Sending Failed	7
My Special Lending Friends	15
Item Shipped Internationally	6
Item Shipped	99
International Requests	3
In Stacks Searching	123
In Remote Storage Retrieval	4
HSL Shipping	1
Cancelled via Lending Web	1
Awaiting Renewal Request Processing	10
Awaiting Lending Scanning	31
Awaiting EJournal Processing	4
Awaiting Conditional Request Processing	8
Awaiting Cancellation Review	10
Awaiting Article Exchange Notification	6
Aeon Request Sending Failed	4
OCLC Special Message: Complete?	4

Completed Requests (195 items):

- Cancelled by ILL Staff 195

Total Items: 1125

Organize queues to better identify actions needed

- Right click and select **add to new category**
- Add **category name** & click **Create**

Main

Borrowing Document Delivery Lending

Request Conditionalized	
Odyssey Sending Failed	
My Special Lending Friends	
Item Shipped Internationally	6
Item Shipped	99
International Requests	3
In Stacks Searching	
In Remote Storage Retrieval	
HSL Shipping	
Cancelled via Lending Web	
Awaiting Renewal Request Processing	
Awaiting Lending Scanning	
Awaiting EJournal Processing	
Awaiting Conditional Request Processing	8
Awaiting Cancellation Review	10
Awaiting Article Exchange Notification	6
Aeon Request Sending Failed	4
OCLC Special Message: Complete?	4
Completed Requests (754 items)	
Cancelled by ILL Staff	195
Request Finished	559

1125

1125

- Click and drag **additional queues** into that category
- Expand and close with **Plus/Negative** toggle

Awaiting Cancellation Review	10
Awaiting Article Exchange Notification	6
Aeon Request Sending Failed	4
OCLC Special Message: Complete?	4
Completed Requests (754 items)	

1125

Awaiting Request Processing	45
Awaiting Return Label Printing	1
Awaiting RUSH ILL Processing	1
Awaiting Unfilled Processing	
Awaiting User Verification	
Blocked Returns	
British Library Example	
Cancelled by Customer	24
Cancelled by ILL Staff	277
Check Notes	1
Checked Out to Customer	13
Customer Not Notified	4
Customer Notified via E-Mail	
Customer Notified via Mail	
Customer Notified via Phone	
Delinquent Account	
Downtown Receives	
Ebook Review	
Faculty Requests	
In Electronic Delivery Processing	
In Purchase Review	
In Transit from Customer	
In Transit to Pickup Location	
New Distance Ed Requests	
No Renewal	
OCLC Special Message: Overdue	
OCLC Special Message: Received?	
Overdue-Faculty	
Problem Patron	
Recalled from Patron	
Received Partial/Incorrect Item	
Recent Date - Evaluate for Purchase	1
Request Finished	516
Request in Processing	2
Request Sent	25

From this

- Can click and drag categories, just like individual queues
- Display only when requests are in a queue in the group

Requests (145 items)	
Awaiting Request Processing	45
Awaiting Copyright Clearance	7
Awaiting RUSH ILL Processing	1
Awaiting Unfilled Processing	87
Awaiting User Verification	1
Faculty Requests	1
New Distance Ed Requests	3
+ Problem Requests (54 items)	
+ Purchase on Demand (4 items)	
+ Status Queues (119 items)	
+ Completed Requests (817 items)	
+ Custom Queues (20 items)	
+ Renewals (5 items)	

To this

Hide Queues

The screenshot shows a software interface with a 'Main' tab and three sub-tabs: 'Borrowing', 'Document Delivery', and 'Lending'. Below these is a list of request queues. The 'Request Finished' queue is selected and highlighted in blue. A context menu is open over it, with 'Hide this Queue' selected. A grey callout box with a bullet point points to the 'Request Finished' row, and a grey arrow points to the 'Hide this Queue' option in the menu.

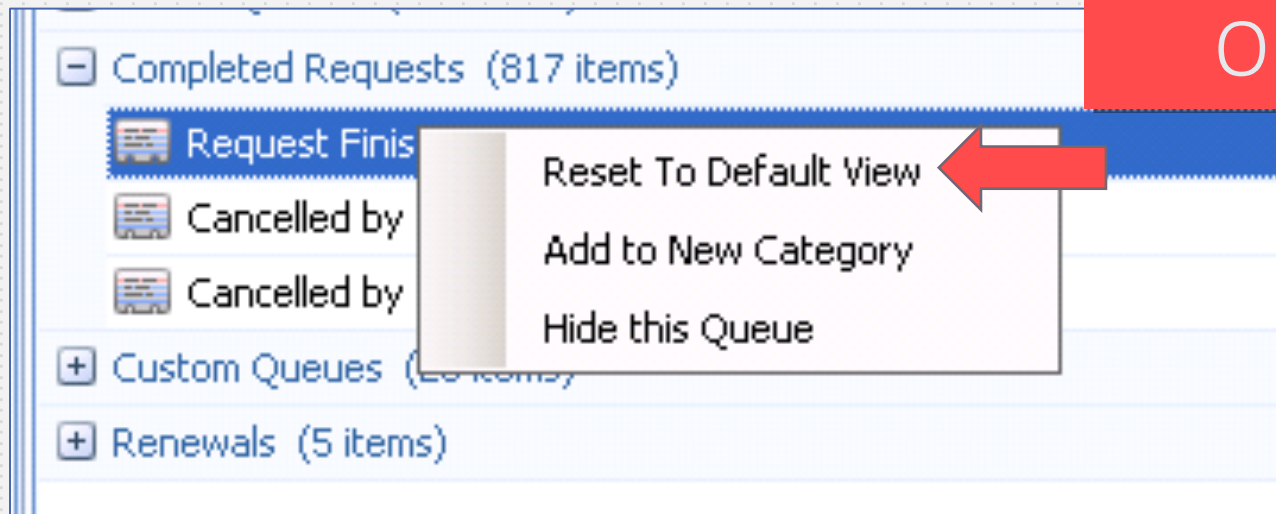
Queue Name	Count
Requests (145 items)	
Awaiting Request Processing	45
Awaiting Copyright Clearance	
Awaiting RUSH ILL Processing	
Awaiting Unfilled Processing	87
Awaiting User Verification	1
Faculty Requests	1
New Distance Ed Requests	3
+ Problem Requests (54 items)	
+ Purchase on Demand (4 items)	
+ Status Queues (119 items)	
- Completed Requests (817 items)	
Request Finished	516
Cancelled by [unclear]	24
Cancelled by [unclear]	277
+ Custom Queues (6 items)	
+ Renewals (5 items)	

- Right click and select Hide this Queue



If you choose to hide a queue....

Be sure to check for suppressed queues that need to be monitored



Only one BIG undo

Ideas for Use

Closed Requests

Individual Staff Queues

Special Messages

In Process/Status Queues

Acquisitions

Problem Requests

ILLiad New User Club – Spring Cleaning

GRIDS

Similar to Spreadsheet Functionality

The screenshot shows the ILLiad Client interface with a table of lending requests. The table has 17 columns and 10 rows of data. The columns are: Transaction Number, Username, Request T..., Loan Author, Loan Title, Loan Publis..., Loan Place, Loan Date, Loan Edition, Photo Jour..., Photo Jour..., Photo Jour..., Photo Jour..., Photo Jour..., Photo Jour..., Photo Artic..., Photo Artic..., and C. The rows contain details for various lending requests, including transaction numbers, usernames, request types, authors, titles, publication information, loan dates, editions, photo journal counts, and authors/artic...

Transaction Number	Username	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...	Photo Artic...	Photo Artic...	C
2351	Lending	Loan	Hannigan, ...	Ida B : --an...	New York : ...			1st ed.	Ida B : --an...						Hannigan, ...		N
2352	Lending	Loan	Lobel, Arnold.	Fables /	[New York] ...			1st ed.	Fables /						Lobel, Arnold.		[N
2353	Lending	Loan	Cussler, Clive.	Sahara : a ...	Boston, Ma...			Large print ...	Sahara : a ...						Cussler, Clive.		Bo
2355	Lending	Article	Greig, Dela...	Developme...	1991-1998:...		2006		Developme...	16	5		2006	465-475	Greig, Dela...	Shea butter...	19
2356	Lending	Article	Deegan, F M	Contributio...	[Heidelberg...		2011		Contributio...	162	3		2011	651-669	Deegan, F M	Magma mixi...	[F
2361	Lending	Article	King, Jason B.	Journal of v...	[Oxford] : ...		2007		Journal of v...	17	3		2007	290-293	King, Jason B.	Paintball in...	[C
2362	Lending	Loan	Robison, Jo...	Look me in t...	New York : ...				Look me in t...						Robison, Jo...		Ne
2363	Lending	Loan	Tyler, Stev...	Does the n...	New York : ...				Does the n...						Tyler, Stev...		Ne
2364	Lending	Loan		The monast...	London : BB...				The monast...								Lc
2380	Lending	Loan	Youmans; Y...	Youmans ce...	New York : ...				Youmans ce...						Youmans; Y...		Ne

Layouts are unique to each status

Sort Columns

Home Borrowing Document Delivery Lending System Process

Open View Cancel Route Add Flag Send E-mail Export Print

Main Awaiting Lending Request Processing X

Drag a column header here to group by that column

Transac...	Lending Library	Rush	Not Wante...	Request Type	Maxcost
2351	TRNAA	Regular	02/06/2015	Loan	0
2352	TRNAA	No	02/06/2015	Loan	0
2353	TRNAA	Regular	02/06/2015	Loan	6.99
2355	TRNAA	No	09/14/2016	Article	
2356	TRNAA	No	09/21/2015	Article	
2361	COD	Regular	03/11/2015	Article	\$50.00IFM
2362	COD	No	03/11/2015	Loan	\$50.00IFM
2363	COD	No	03/11/2015	Loan	\$50.00IFM
2364	COD	Regular	03/11/2015	Loan	\$50.00IFM
2380	TRNAA	No	04/02/2015	Loan	35.00IFM

layout 10 requests

Home Borrowing Document Delivery Lending System Process

Open View Cancel Route Add Flag Send E-mail Export Print

Main Awaiting Lending Request Processing X

Drag a column header here to group by that column

Transactio...	Lending Library	Rush	Not Wante..	Request Type	Maxcost
2355	TRNAA	No	09/14/2016	Article	
2356	TRNAA	No	09/21/2015	Article	
2361	COD	Regular	03/11/2015	Article	50.00IFM
2351	TRNAA	Regular	02/06/2015	Loan	
2352	TRNAA	No	02/06/2015	Loan	
2353	TRNAA	Regular	02/06/2015	Loan	.99
2362	COD	No	03/11/2015	Loan	50.00IFM
2363	COD	No	03/11/2015	Loan	50.00IFM
2364	COD	Regular	03/11/2015	Loan	50.00IFM
2380	TRNAA	No	04/02/2015	Loan	5.00IFM

layout 10 requests

- Default sort by **Transaction Number** (ascending)
- Click column header to sort by that column

Move Columns

Main Awaiting Lending Request Processing X

Drag a column header here to group by that column

ie	Pages	Due Date	Renewals ...	Spec Ins	Pieces	Library Us...	Allow Phot...	Lending Lib...	Reason Fo...
		3/20/2015	Yes			No	Yes	TRNAA	
								TRNAA	

Main Awaiting Lending Request Processing X

Drag a column header here to group by that column

Transactio...	Lending Library	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date
2351	TRNAA	Loan	Hannigan, Ka...	Ida B : --and her plans to maximize fun, avoid di...	New York : ...		
2352	TRNAA	Loan	Lobel, Arnold.	Fables /	[New York] ...		
2353	TRNAA	Loan	Cussler, Clive.	Sahara : a novel /	Boston, Ma...		
2355	TRNAA	Article	Greig, Delaney	Development in practice Shea butter: connecting...	1991-1998:...		2006
2356	TRNAA	Article	Deegan, F M	Contributions to mineralogy and petrology Magn...	[Heidelberg...		2011
2361	COD	Article	King, Jason B.	Journal of veterinary emergency and critical car...	[Oxford] : ...		2007
2362	COD	Loan	Robison, Joh...	Look me in the eye : my life with Asperger's /	New York : ...		
2363	COD	Loan	Tyler, Steve...	Does the noise in my head bother you? : a rock '...	New York : ...		
2364	COD	Loan		The monastery	London : BB...		
2380	TRNAA	Loan	Youmans; Yo...	Youmans celebrated hats style and quality uneq...	New York : ...		

Resize Columns

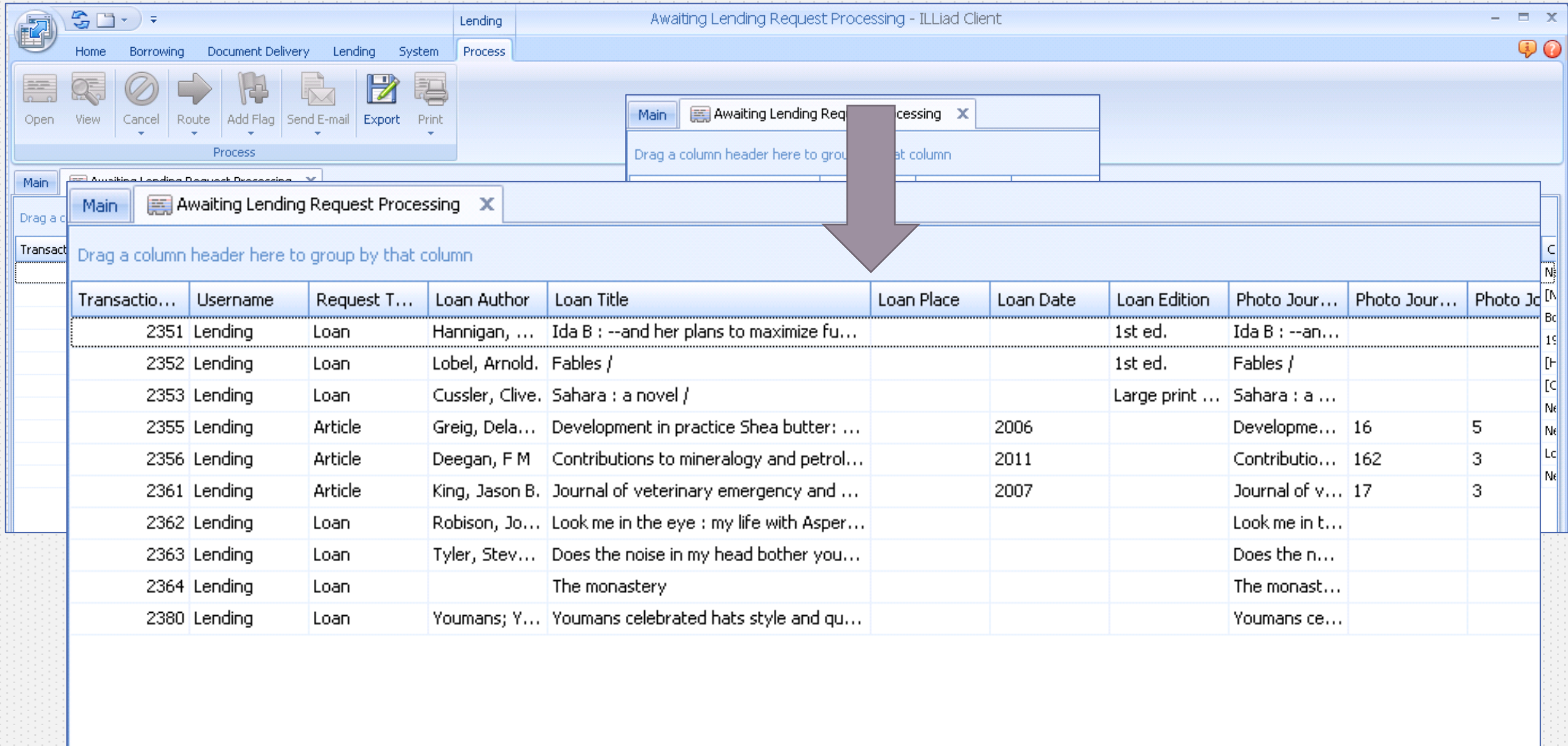
The screenshot displays a software interface with a table of data. A context menu is open over the 'Loan Title' column header. The menu options are:

- Sort Ascending
- Sort Descending
- Clear Sorting
- Group By This Column
- Hide Group By Box
- Remove 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...

A red box highlights the 'Loan Title' column header and the 'Best Fit' option in the menu. Two red arrows point from the 'Best Fit' and 'Best Fit (all columns)' options to the 'Loan Title' header.

Transaction Number	Username	Request T...	Loan Author	Loan Title
2351	Lending	Loan	Hannigan, ...	Ida B : --and her plans to maximize fun, av...
2352	Lending	Loan	Lobel, Arnold...	Fables /
2353	Lending	Loan	Cussler, Clive...	Sahara : a novel /
2355	Lending	Article	Greig, Dela...	Development in practice Shea butter: conne...
2356	Lending	Article	Deegan, F M	Contributions to mineralogy and petrology f...
2361	Lending	Article	King, Jason B...	Journal of veterinary emergency and critica...
2362	Lending	Loan	Robison, Jo...	Look me in the eye : my life with Asperger's
2363	Lending	Loan	Tyler, Stev...	Does the noise in my head bother you? : a
2364	Lending	Loan		The monastery
2380	Lending	Loan	Youmans; Y...	Youmans celebrated hats style and quality unequall... New York : ...

Remove Columns



The screenshot shows the ILLiad Client interface with a table of lending requests. A large grey arrow points to the 'Loan Title' column header, indicating the process of removing columns. The table has the following columns: Transaction ID, Username, Request Type, Loan Author, Loan Title, Loan Place, Loan Date, Loan Edition, Photo Journal, Photo Journal, and Photo Journal.

Transactio...	Username	Request T...	Loan Author	Loan Title	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jo
2351	Lending	Loan	Hannigan, ...	Ida B : --and her plans to maximize fu...			1st ed.	Ida B : --an...		
2352	Lending	Loan	Lobel, Arnold.	Fables /			1st ed.	Fables /		
2353	Lending	Loan	Cussler, Clive.	Sahara : a novel /			Large print ...	Sahara : a ...		
2355	Lending	Article	Greig, Dela...	Development in practice Shea butter: ...		2006		Developme...	16	5
2356	Lending	Article	Deegan, F M	Contributions to mineralogy and petrol...		2011		Contributio...	162	3
2361	Lending	Article	King, Jason B.	Journal of veterinary emergency and ...		2007		Journal of v...	17	3
2362	Lending	Loan	Robison, Jo...	Look me in the eye : my life with Asper...				Look me in t...		
2363	Lending	Loan	Tyler, Stev...	Does the noise in my head bother you...				Does the n...		
2364	Lending	Loan		The monastery				The monast...		
2380	Lending	Loan	Youmans; Y...	Youmans celebrated hats style and qu...				Youmans ce...		

Restore Columns

Right-Click column header

- Select **Column Chooser**
- Click and drag to desired location

The screenshot shows a software interface with a table of lending requests. A context menu is open over the 'Lending Library' column header, and the 'Column Chooser' option is selected. A 'Customization' dialog box is open, showing a list of columns to be added to the table. Arrows indicate the drag-and-drop action from the dialog to the table header.

Transac...	Lending Library	Rush	Not Wante...	Request T...	Maxcost	System ID	Loan Date	Loan Author	Loan Title
2351	TRNAA	Regular	02/06/2015	Loan	0	OCLC		Hannigan, Ka...	Ida B : --and her plans to maximize f
2352	TRNAA	No	02/06/2015	Loan	0	OCLC		Lobel, Arnold.	Fables /
2353	TRNAA	Regular	02/06/2015	Loan	6.99	OCLC		Cussler, Clive.	Sahara : a novel /
2355	TRNAA	No	03/14/2016	Article		OCLC	2006	Greig, Delaney	Development in practice Shea butter
2356	TRNAA	No	09/21/2015	Article		OCLC	2011	Deegan, F M	Contributions to mineralogy and pet
2361	COD	Regular	03/11/2015	Article	\$50.00IFM	OCLC	2007	King, Jason B.	Journal of veterinary emergency and
2362	COD	No	03/11/2015	Loan	\$50.00IFM	OCLC		Robison, Joh...	Look me in the eye : my life with Asp
2363	COD	No	03/11/2015	Loan	\$50.00IFM	OCLC		Tyler, Steve...	Does the noise in my head bother yo
2364	COD	Regular	03/11/2015	Loan	\$50.00IFM	OCLC			The monastery
2380	TRNAA	No	04/02/2015	Loan	35.00IFM	OCLC		Youmans; Yo...	Youmans celebrated hats style and c

Group Columns

Main Awaiting Lending Request Processing X

Drag a column header here to group by that column

Transactio...	Lending Library	Rush	Not Wante...	Request Type	Maxcost	S
2355	TRNAA	No	09/14/2016	Article		O
2356	TRNAA	No	09/21/2015	Article		O
2361	COD	Regular	03/11/2015			
2351	TRNAA	Regular	02/06/2015			
2352	TRNAA	No	02/06/2015			
2353	TRNAA	Regular	02/06/2015			
2362	COD	No	03/11/2015			
2363	COD	No	03/11/2015			
2364	COD	Regular	03/11/2015			
2380	TRNAA	No	04/02/2015			

Main Awaiting Lending Request Processing X

Request Type

Transactio...	Lending Library	Rush	Not Wante.
+ Request Type: Loan			
+ Request Type: Article			

Main Awaiting Lending Request Processing X

Request Type

Transactio...	Lending Library	Rush	Not Wante...	Maxcost	System ID
- Request Type: Loan					
2380	TRNAA	No	04/02/2015	35.00IFM	OCLC
2364	COD	Regular	03/11/2015	\$50.00IFM	OCLC
2363	COD	No	03/11/2015	\$50.00IFM	OCLC
2362	COD	No	03/11/2015	\$50.00IFM	OCLC
2353	TRNAA	Regular	02/06/2015	6.99	OCLC
2352	TRNAA	No	02/06/2015	0	OCLC
2351	TRNAA	Regular	02/06/2015	0	OCLC
+ Request Type: Article					

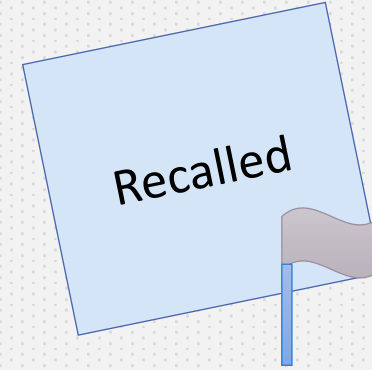
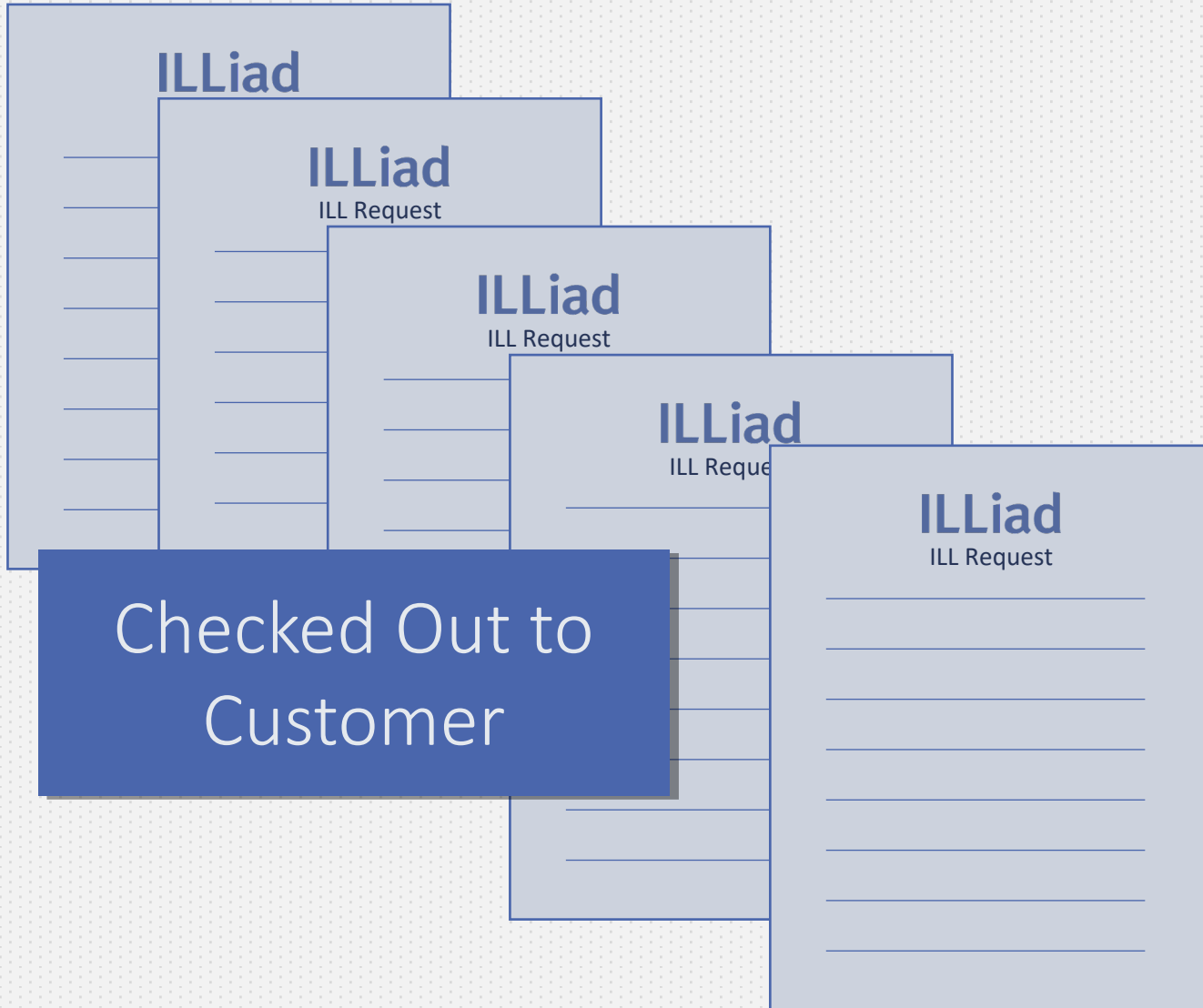
Click & drag **column header** into space above grid

- Requests groups by **field value**
- Open and close with **+/-**

ILLiad New User Club – Spring Cleaning

FLAGS & SPECIAL MESSAGES

Virtual Sticky Notes



2 Types: Custom & Special Message

Home Borrowing Document Delivery Lending System

Number ALL
User Information ALL
Citation Information ALL

Search Requests

Username
Name
ID

Search Users

Symbol
Name
Address

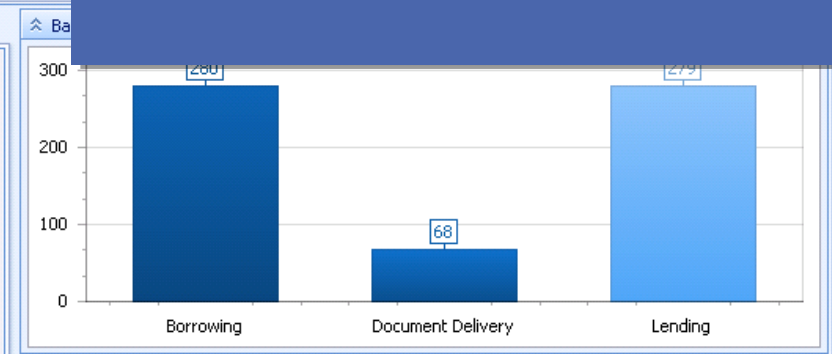
Search

Main

Borrowing Document Delivery Lending

Awaiting Renewal OK Processing	2
Awaiting Recalled Processing	1
Awaiting Patron Response	3
Awaiting Odyssey Processing	6
Awaiting Doc Provider Processing	5
Awaiting Denied Renewal Processing	2
Awaiting Borrowing Scanning	6
Awaiting Article Exchange Review	5
Customer Notified via Mail	7
Awaiting RUSH ILL Processing	1
Awaiting Customer Contact	1
OCLC Special Message: Overdue	9
OCLC Special Message: Received?	10
Overdue-Faculty	6
Problem Patron	1
Faculty Requests	1
In Transit from Customer	8
Check Notes	1
Awaiting User Verification	1
Custom Queues (23 items)	
Held Requests (1 items)	
Request Held until 12/24/2014	1

1155



System

Alert	B	D	L
Connection Manager	17	0	11
Odyssey Manager	0	0	4
Outgoing E-Mail	175	49	30
System Error Flags	6	0	0
Users To Clear	1	0	0

199 49 45

Apply multiple flags to the same request

Main Checked Out to Customer X

Drag a column header here to group by that column

Transac...	Lending Lib...	Username	Due Date	Status	Transaction Status
55	TRNAB	dickinson	8/25/2013	Faculty	Checked Out to Customer
826	TRNAA	gherbert	10/14/2012	Undergradu...	Checked Out to Customer
829	TRNAA	gherbert	5/19/2012	Undergradu...	Checked Out to Customer
1165	Bri	avisonm	11/30/2013	Faculty	Checked Out to Customer
1191	MNC	bcollins	12/3/2013		Checked Out to Customer
1348		ddistance		DistanceEd	Checked Out to Customer
1349		ddistance	12/1/2013	DistanceEd	Checked Out to Customer
1350		ddistance		DistanceEd	Checked Out to Customer
1366		ddistance	12/1/2013	DistanceEd	Checked Out to Customer
1584	TAMCT	rreader	10/9/2013	Undergradu...	Checked Out to Customer
1586	TAMCT	rreader	8/4/2013	Undergradu...	Checked Out to Customer
1780	GTA	dhall	10/10/2013	Faculty	Checked Out to Customer
1781	GTA	dhall	10/10/2013	Faculty	Checked Out to Customer
1783	GTA	dhall	11/30/2013	Faculty	Checked Out to Customer
1892	TRNAA	ddistance	12/26/2013	DistanceEd	Checked Out to Customer
2206	TRNAA	avisonm	10/4/2014	Faculty	Checked Out to Customer
2212	TRNAA	rreader	10/4/2014	Undergradu...	Checked Out to Customer
2213	TRNAA	dhall	12/24/2014	Faculty	Checked Out to Customer
2233	TRNAA	ddistance	10/4/2014	DistanceEd	Checked Out to Customer

Applied Independent of Status

Main Overdue-Faculty X

Drag a column header here to group by that column

Transactio...	Username	Request T...	Loan Author	Loan Title
1165	avisonm	Loan	Marrocco, W	Music in America : an anthology from the
1780	dhall	Loan	Sides, Ham...	Ghost soldiers : the forgotten epic story
1781	dhall	Loan	Schiff, Stacy.	Cleopatra : a life /
1783	dhall	Loan	Ackerman, ...	The zookeeper's wife /

Do Not Display to Patron



Main Checked Out to Customer X

Main Overdue-Faculty X

Drag a column header here to group by that column

Transac...	Lending Lib...	Username	D	Transactio...	Username	Request T...	Loan Author	Loan Title
55	TRNAB	dickinson	8/21/2013	1165	avisonm	Loan	Marrocco, W	Music in America : an anthology from the
826	TRNAA	gherbert	10/10/2013	1780	dhall	Loan	Sides, Ham...	Ghost soldiers : the forgotten epic story
829	TRNAA	gherbert	10/10/2013	1781	dhall	Loan	Schiff, Stacy.	Cleopatra : a life /
1165	Bri	avisonm	10/10/2013	1783	dhall	Loan	Ackerman, ...	The zookeeper's wife /
1191	MNC	bcollins	12/26/2013					
1348		ddistance						
1349		ddistance	12/26/2013					
1350		ddistance						
1366		ddistance	12/26/2013					
1584	TAMCT	rreader	10/9/2013	Undergradu...		Checked Out to Customer		
1586	TAMCT	rreader	8/4/2013	Undergradu...		Checked Out to Customer		
1780	GTA	dhall	10/10/2013	Faculty		Checked Out to Customer		
1781	GTA	dhall	10/10/2013	Faculty		Checked C		
1783	GTA	dhall	11/30/2013	Faculty		Checked C		
1892	TRNAA	ddistance	12/26/2013	DistanceEd		Checked C		
2206	TRNAA	avisonm	10/4/2014	Faculty		Checked C		
2212	TRNAA	rreader	10/4/2014	Undergradu...		Checked C		
2213	TRNAA	dhall	12/24/2014	Faculty		Checked C		
2233	TRNAA	ddistance	10/4/2014	DistanceEd		Checked C		

Request
Delivery
quest
WU
ter
Paper
Document
(Text)

Copyright © 2011 Atlas Systems, Inc. All Rights Reserved.

Checked Out Items

Transaction Number	Document Type	Title	Author	Due Date	Status	Status Date
1780	Book	Ghost soldiers : the forgotten epic story of World War II's most dramatic mission /	Sides, Hampton.	10/10/2013	Checked Out to Customer	8/21/2013 9:01:14 AM
1781	Book	Cleopatra : a life /	Schiff, Stacy.	10/10/2013	Checked Out to Customer	8/21/2013 9:01:23 AM
1783	Book	The zookeeper's wife /	Ackerman, Diane, 1948-	11/30/2013	Checked Out to Customer	8/21/2013 9:01:52 AM
2213	Score	The joy of music /	Bernstein, Leonard, 1918-1990.	12/24/2014	Checked Out to Customer	9/10/2014 1:00:24 PM

Referenceable in Custom Search



The screenshot shows the 'Custom Request Search' dialog box. The 'Table' list on the left includes 'CustomFlags', which is highlighted. The 'Field' list on the right includes 'FlagName'. A callout box labeled 'Search Options for Flags' points to the 'FlagName' field. A large grey arrow points from the left towards the 'CustomFlags' table.

The screenshot shows the 'Custom Request Search' dialog box with search criteria defined. The criteria are:

- [CustomFlags.FlagName] Equals Overdue-Faculty
- [Transactions.DueDate] Is less than or equal to 12/24/2014

Below the criteria, there is a table with the following data:

Transac...	Username	Request T...	Loan Author	Loan Title
1165	avisonm	Loan	Marrocco, W	Music in America : an anthology from t...
1780	dhall	Loan	Sides, Ham...	Ghost soldiers : the forgotten epic sto...
1781	dhall	Loan	Schiff, Stacy.	Cleopatra : a life /
1783	dhall	Loan	Ackerman, ...	The zookeeper's wife /

Flag Properties

For Use in All Modules



Can Configure Client or Server Addons to use Custom Flags



Special Message Flags

Borrowing



- OCLC Special Message: Overdue
- OCLC Special Message: Received?
- OCLC Special Message: Borrower Lost

System Assigned

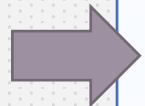
Display like Others

System Checked Every 12 Hours

Lending



- OCLC Special Message: Complete?
- OCLC Special Message: Not Received
- OCLC Special Message: Lender Lost



Special Message Flag	Count
Awaiting Renewal OK Processing	
Awaiting Recalled Processing	
Awaiting Patron Response	
Awaiting Odyssey Processing	
Awaiting Doc Provider Processing	
Awaiting Denied Renewal Processing	
Awaiting Borrowing Scanning	6
Awaiting Article Exchange Review	5
Customer Notified via Mail	7
Awaiting RUSH ILL Processing	1
Awaiting Customer Contact	1
OCLC Special Message: Overdue	9
OCLC Special Message: Received?	10
Overdue-Faculty	6
Problem Patron	1
Faculty Requests	1
In Transit from Customer	8
Check Notes	1
Awaiting User Verification	1
Custom Queues (23 items)	
Held Requests (1 items)	
Request Held until 12/24/2014	1

1155

Creating Flags

The screenshot shows the ILLiad Customization Manager interface. The left sidebar contains a tree view of system components, with 'System' and 'CustomFlags' highlighted by arrows. The main area displays a table of 'CustomFlags' with columns for ID, NWTGC, and FlagName. Below the table is an 'Edit Row' form with fields for ID, NWTGC, and FlagName. The 'FlagName' field is highlighted in yellow.

ID	NWTGC	FlagName
7	ILL	Problem Patron
8	ILL	Overdue-Faculty

ID	
NWTGC	ILL
FlagName	No Renewal

- Add Flag Name
- Click into ID Field
 - ID Added Automatically
- Save

Using Flags—On the Request Form

The screenshot displays a library request form titled "37 - Borrowing Request". The interface includes a top navigation bar with tabs for "Borrowing Processing", "Printing", "Copyright", and "Reprints Desk". A central toolbar contains various action buttons: "Cancel Request", "Request Sent", "Route", "Route To Document", "Add Flag", "Remove Flag", "Clone to Another User", "Policies Directory", "Billing", "View", "Send E-Mail", "Pending Updates", and "Import into Resubmission". A blue callout box with the text "Adding a Flag" points to the "Add Flag" button. A dropdown menu is open below the "Add Flag" button, listing three options: "No Renewal", "Overdue-Faculty", and "Problem Patron".

General Request Information

Transaction Number	37	Article	Loan
Username	avisonm	Wanted By	
Transaction Date	9/30/2014 11:06 AM	Not Wanted After	05/19/2012
Delivery Method	Hold for Pickup	Site	
Service Level	Regular	Shipping Options	
Billing Account		Doc Type	Article

Article Info

Journal Title	Journal of pediatric psychology.		
Volume/Issue	35	10	
Month/Year/Pages	1	2010	1061-1070
Article Author	Chorney, Jill MacLaren		
Article Title	Time-Window Sequential Analysis: An Introduction for Pediatric Psychologists		
Original Journal Title	Journal of Pediatric Psychology		

Additional Options

- Accept Alternate Edition
- Accept Non English
- Allow Copies?
- Copyright Already Paid?
- Allow Renewals?
- Library Use Only?
- Replacement Pages?
- Priority Shipping

System 873 - Borrowing Request

Borrowing Processing Printing Copyright OCLC

Cancel Request Request Sent Route Route To Document Add Flag Remove Flag Clone to Current User Clone to Another User

Next Step Routing No Renewal

Detail History OCLC 239.50 PubMed/Docline WorldCat Local Search GIST Purch

General Request Information

Transaction Number: 873 Article Loan

Username: dickinsone Wanted By: _____

Transaction Date: 7/10/2014 9:51 AM Not Wanted After: 06/11/2013

Delivery Method: Hold for Pickup Site: _____

Service Level: Regular Shipping Options: _____

Billing Account: _____ Doc Type: Book

Loan Info Collections Local Holdings Imported Request User Copyright Invoice Additional Library OCLC

Title: The clown in the belfry : writings on faith and fiction /

Author: Buechner, Frederick, 1926-

Publisher: HarperSanFrancisco

Place: [San Francisco]

Date: 1992

Edition: 1st ed.

Original Loan Author: Buechner, Frederick

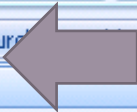
Original Loan Title: The clown in the belfry : writings on faith and fiction

Accept Alternate Edition
 Accept Non English
 Allow Copies?
 Copyright Already Paid?
 Allow Renewals?
 Library Use Only?
 Replacement Pages?
 Priority Shipping
 Ariel

Item Cost: _____

Date	Note	Type	Added By
------	------	------	----------

Removing a Flag



From Grid List

Checked Out to Customer - ILLiad Client

Home Borrowing Document Delivery Lending System Process

Open Cancel Route Route to Document Delivery Add Flag Send Email Export Print

Process

Main Checked Out to Customer X

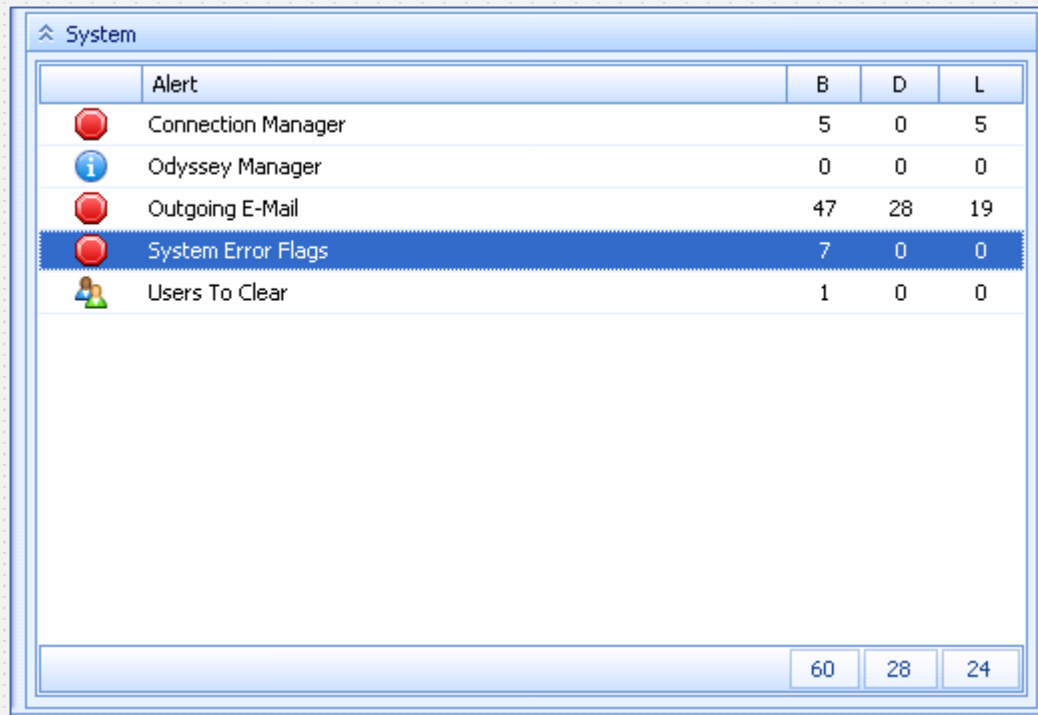
Drag a column header here to group by that color






Transac...	Lending Lib...	Username	Due Date	Status	Transaction Status	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	PF
55	TRNAB	dickinson	8/25/2013	Faculty	Checked Out to Customer	Loan	Updike, John.	Collected poems, 1953-1993 /	Knopf ;Dist...	New York	1993	1st ed.		
826	TRNAA	gherbert	10/14/2012	Undergradu...	Checked Out to Customer	Loan	Borges, Jor...	Borges, a reader : a selection from th...	Dutton	New York	1981	1st ed.		
829	TRNAA	gherbert	5/19/2012	Undergradu...	Checked Out to Customer	Loan	Giddins, Gary.	Faces in the crowd : musicians, writer...	Oxford Uni...	New York	1992			
1165	Bri	avisonm	11/30/2013	Faculty	Checked Out to Customer	Loan	Marocco, W	Music in America : an anthology from ...	W.W. Norton,	New York :	1964			
1191	MNC	bcollins	12/3/2013		Checked Out to Customer	Loan	Kohl, Mary...	Good Earth art : environmental art fo...	Bright Ring ...	Bellingham ...	1991			
1348		ddistance		DistanceEd	Checked Out to Customer	Loan	Oliver, Mary	One Thousand Mornings			2012			
1349		ddistance	12/1/2013	DistanceEd	Checked Out to Customer	Loan	Collins, Billy	Nine Horses						
1350		ddistance		DistanceEd	Checked Out to Customer	Loan	Collins, Billy	Questions about angels						
1366		ddistance	12/1/2013	DistanceEd	Checked Out to Customer	Loan	Collins, Billy	Picnic, lightning						
1584	TAMCT	rreader	10/9/2013	Undergradu...	Checked Out to Customer	Loan	Brinkley, Do...	The wilderness warrior : Theodore Ro...	HarperCollins	New York	2009	1st ed.		
1586	TAMCT	rreader	8/4/2013	Undergradu...	Checked Out to Customer	Loan	Dubos, Ren...	So human an animal /	Scribner	New York	1968			
1780	GTA	dhall	10/10/2013	Faculty	Checked Out to Customer	Loan	Sides, Ham...	Ghost soldiers : the forgotten epic sto...	Doubleday	New York	2001	1st ed.		
1781	GTA	dhall	10/10/2013	Faculty	Checked Out to Customer	Loan	Schiff, Stacy.	Cleopatra : a life /	Little Brow...	New York	2010	1st ed.		
1783	GTA	dhall	11/30/2013	Faculty	Checked Out to Customer	Loan	Ackerman, ...	The zookeeper's wife /	W.W. Norton	New York	2007	1st ed.		
1892	TRNAA	ddistance	12/26/2013	DistanceEd	Checked Out to Customer	Loan		Masterpieces of African-American liter...	HarperCollins	New York NY	1992	1st ed.		
2206	TRNAA	avisonm	10/4/2014	Faculty	Checked Out to Customer	Loan	Cox, Brian, ...	Dylan Thomas; a collection of critical e...						
2212	TRNAA	rreader	10/4/2014	Undergradu...	Checked Out to Customer	Loan	Bernstein, L...	The joy of music /						
2213	TRNAA	dhall	12/24/2014	Faculty	Checked Out to Customer	Loan	Bernstein, L...	The joy of music /						
2233	TRNAA	ddistance	10/4/2014	DistanceEd	Checked Out to Customer	Loan	Norman, Do...	The psychology of everyday things /						

hblack 19 requests

System Error Flags

- Duplicate items received
- Lender Conflict/Status Conflict
- Evaluate and clear as other errors



Alert	B	D	L
 Connection Manager	5	0	5
 Odyssey Manager	0	0	0
 Outgoing E-Mail	47	28	19
 System Error Flags	7	0	0
 Users To Clear	1	0	0

60 28 24

Special Messages

Main

Borrowing

Borrowing Document Delivery Lending

- Delivered to Web 1
- Delinquent Account 0
- Customer Notified via Phone
- Customer Notified via E-Mail
- Customer Not Notified
- Checked Out to Customer**
- Cancelled by ILL Staff
- Cancelled by Customer
- Awaiting Unfilled Processing
- Awaiting Return Label Printing
- Awaiting Renewal OK Processing
- Awaiting Recalled Processing
- Awaiting Patron Response
- Awaiting Odyssey Processing
- Awaiting Doc Provider Processing
- Awaiting Denied Renewal Processing
- Awaiting Borrowing Scanning
- Awaiting Article Exchange Review
- Customer Notified via Mail
- Awaiting RUSH ILL Processing
- Awaiting Customer Contact
- OCLC Special Message: Overdue**
- OCLC Special Message: Received?**
- Overdue Faculty
- Faculty Requests
- In Transit from Customer 5
- Awaiting Conditional Processing 3

1103

Main

Lending

Borrowing Document Delivery Lending

- Requests (941 items)
 - Awaiting Lending Request Processing 9
 - Item Shipped 89
 - In Stacks Searching 94
 - Awaiting Lending Scanning 46
 - Awaiting Conditional Request Processing 7
 - Request Finished 519
 - Request Conditionalized 24
 - Cancelled via Lending Web 1
 - Awaiting Article Exchange Notification 5
 - Request in Processing 1
 - Cancelled by ILL Staff 142
 - OCLC Special Message: Complete?** 4
- Renewals (7 items)
- Training Categories (73 items)
- Aeon Requests (4 items)

Special Messages Display as Flagged Requests

Special Messages

Main - ILLiad Client

Home Borrowing Document Delivery Lending **System**

Clear Users Clear WorldCat Search OCLC Search/Review Statuses Policies Directory Resource Sharing Settings Web Logon Web Reports Web Alerts Atlas Systems Community Portal OCLC ILLiad Event Log Groups Maintenance Manage Addons

LC Statuses - ILLiad Client 8.0.8.0

	Additional Information	Verified
Problem Status: BORROWER_OVERDUE		
60494400	6791 RECEIVED Perceptions of librarie...	Lender: LLB Patron: ILLiad User Patron, A Due Date: 20100102 <TN:6791><ODYSSEY:216.54.57.237/WOLFGANG>2005 OCLC
60631732	6826 RECEIVED A guide to special colle...	Lender: TRNAB Patron: ILLiad User Patron, A Due Date: 20100108 <TN:6826><ODYSSEY:216.54.57.237/WOLFGANG>1988 OCLC
61260815	6777 RECALLED Library management /	Lender: TRNAB Patron: ILLiad User Patron, A Due Date: 20100205 <TN:6777><ODYSSEY:216.54.57.237/WOLFGANG> OCLC
61260866	6778 RECEIVED Library management /	Lender: TRNAB Patron: ILLiad User Patron, A Due Date: 20100205 <TN:6778><ODYSSEY:216.54.57.237/WOLFGANG> OCLC
63066571	7000 NO_RENEWAL The truth behind the d...	Lender: TRNAB Patron: ILLiad User Patron, A Due Date: 20100325 <TN:7000><ODYSSEY:216.54.57.237/WOLFGANG>2004 OCLC
63962340	191 RECEIVED Needful things /	Lender: TRNAB Patron: ILLiad User Johns, Robert Due Date: 20100417 <TN:191><ODYSSEY:216.54.57.246/ILL> OCLC
63962348	188 RECEIVED The tommyknockers /	Lender: TRNAB Patron: ILLiad User Johns, Robert Due Date: 20100417 <TN:188><ODYSSEY:216.54.57.246/ILL> OCLC
65143101	7072 RECEIVED Atlas shrugged.	Lender: PDC Patron: ILLiad User Patron, A Due Date: 20100522 <TN:7072><ODYSSEY:216.54.57.237/WOLFGANG>1957 OCLC
65143278	5721 RECALLED Cultural atlas of Japan /	Lender: PDC Patron: ILLiad User Patron, A Due Date: 20100523 <TN:5721><ODYSSEY:216.54.57.237/WOLFGANG>1988 OCLC

Direct Produced	0
Expired	0
In Process	4
Lender Direct Delivered	0
Lender Shipped	15
No Renewal	0
Online Produced	11
Pending	0
Recalled	3
Received	5
Renewal Ok	3
Renewal Request	3
Retry	0
Retry Pending	0
Returned	7
Review	0
Review In Process	0
Save	0
Shipped	1
Special Messages Borrower	63
Special Messages Lender	48
Unfilled	7
Will Supply	0

hblack/WOLFGANG

Special Messages

OCLE Request

Home

Save Delete Show Transaction Yes No Manual Complete Manual Receive Manual Not Received Manual Return Undo Shipped

Process Conditional Manual Processing

Work Form Detail Local Holdings Collection Data

General Information

ILL	60494400	Borrower	TRNAA	Req Date	20091203	Need Before	20100102
Status	RECEIVED 20100224			Rec Date	20100224	Renewal Req	
OCLC	62293968	Source	ILLiad	Due Date	20100102	New Due Date	
Lender	*LLB						
Patron	ILLiad User Patron, A						

Bibliographic Information

U Title							
Title	Perceptions of libraries and information resources : a report to the OCLC membership /						
Author		Edition					
Imprint	Dublin, Ohio : OCLC Online Computer Library Center, c2005.			Series			
Article		Volume					
No		Date		Pages			
Verified	<TN:6791><ODYSSEY:216.54.57.237/WOLFGANG>2005 OCLC			ISBN	9781556533648 (pbk.)		

Borrowing Lending

Ship To	OCLC QA Testing test						
Bill To	Atlas Systems, Inc./5301 Providence Road. Ste. 20/Va Beach, VA 23464/USA						
Ship Via	Library Mail	Max Cost		Type		Copyright Compliance	
Borrowing Notes	This is a test account. Please do NOT fill. Thank you!						
Billing Notes	THIS IS A TEST ACCOUNT! PLEASE DO NOT FILL						
E-Mail		Affiliation	We are an OCLC partner developer - not a library.				
Fax		Locations					

Thank You!

If you have any questions before our next session, please contact us at support@atlas-sys.com

