Improving ILL Access to Special Collections through ILLiad-Aeon Integration

Session Agenda

Setting up ILLiad/Aeon Integration

- ILLiad Web Platform Configuration
- ILLiad External Field Mapping
- Aeon Web Platform Configuration
- Request Form Changes

Processing Requests

- Sending Requests from ILLiad
- Receiving Requests in Aeon
- Receiving Responses in ILLiad

Session Goals

At the end of this session, you will understand how to submit requests from ILLiad to Aeon, process an ILL request in Aeon, and receive a response back in ILLiad. You will also understand the basics of configuring the integration as well as what configuration customizations are available.

Setting Up ILLiad/Aeon Integration

**Note: You must have Aeon version 3.3 or higher installed and ILLiad 8.4 or higher.

ILLiad Web Platform Configuration

These setup instructions are for a single ILLiad server configuration. For a shared server configuration, see the documentation links at the end of the handout.

The WebPlatformConfig table in ILLiad will need to have two entries – one for the ILLiad web platform and one for the Aeon web platform. Each record contains five fields: ID, NVTGC, API Key, Base Webservice URL, and Description. The ID and NVTGC fields are auto-populated. The API Key for each entry can be generated by clicking the ellipses button in this field. The Base webservice URL should be a publicly-accessible URL (not protected by remote authentication) and must be a secure web page (containing https:). There must be an SSL certificate installed for each page. The Description field is required but the value can be anything that will describe each web platform.

WebPlatformConfig

ID	NVTGC	APIKey	BaseWebserviceUrl	Description
3	ILL	7f846db5-c733-433e-816a-9384f4a2de43	https://training4.atlas-sys.com:444/ILLiadWebPlatform/	Local ILLiad Platform
4	ILL	4a6610af-90f6-4b28-8938-b4b69fe82fb6	https://training4.atlas-sys.com:444/aeon/WebPlatform/	Local Aeon Platform

ILLiadWebPlatformConfig Key - Once you have set up the WebPlatformConfig table, you will need to set the ILLiadWebPlatformConfig key.This value will be the ID number for the WebPlatformConfig table entry (made in the ILLiad Customization Manager) that identifies the **ILLiad Web Platform**.

ILLiad External Field Mapping

There are three things to set up in the External Field Mapping table:

1. The ability to send loan requests and/or photoduplication requests
2. The Aeon user that will be associated with all the requests
3. The information from the ILLiad transaction that will be transferred to the Aeon request

In the field mapping table, there should be one entry to create Loan requests and one entry to create Photoduplication Requests. These are the only entries where the External Type value is Parameter. Both of them map to the Aeon field IsPhotoduplicationRequest. For a loan request, the IsPhotoduplicationRequest value is False, while for a photoduplication request, the IsPhotoduplicationRequest value is True. These entries should be set up in the mapping table as follows:

Name	Value	SystemID	ExternalType	ExternalField
Loan	False	1	Parameter	IsPhotoduplicationRequest
Photoduplication	True	1	Parameter	IsPhotoduplicationRequest

Every request that is sent from ILLiad to Aeon will be associated with a single Aeon user. The username for this user must be defined in the mapping table. There should be one entry for each type of request defining the relevant Aeon user. These two entries are identical except for the Name value and should be set up in the mapping table as follows:

Name	Value	SystemID	ExternalType	ExternalField
Loan	ILL	1	Transaction	Username
Photoduplication	ILL	1	Transaction	Username

In this example, the Aeon username is ILL, but your library can use any username. You will need to ensure that you have set up the corresponding User in Aeon before you begin sending ILLiad requests.

The final type of entries to add to the field mapping table will describe the request information to be transferred from ILLiad to Aeon. The table can contain as many entries as necessary to map the relevant information. However only information from the ILLiad

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transaction table can be exported and the information can only be imported into the Aeon transaction table (in other words, information cannot be exported from the ILLiad Addresses table to the Aeon Notes table, for example). Here are some examples of how to set up the transaction mapping between the two systems:

Name	Value	SystemID	ExternalType	ExternalField
Loan	<#Transaction Field="LoanTitle">	1	Transaction	ItemTitle
Photoduplication	<#Transaction Field="PhotoJournalTitle">	1	Transaction	ItemTitle
Loan	<#Transaction Field="LoanAuthor">	1	Transaction	ItemAuthor
Photoduplication	<#Transaction Field="PhotoArticleAuthor">	1	Transaction	ItemAuthor

If ILL staff will be doing all the scanning of special collections materials, the mapping table should be set up so that both loan and article information will be mapped to Aeon fields for loan requests. Multiple ILLiad fields can be listed consecutively in the Value field so that either the Loan information or the Article information will be passed to Aeon depending on what type of request it is.

Notes: Sometimes the actual database field name is not the same as the display name in the client. See the documentation - https://prometheus.atlas-sys.com/display/Aeon/Key+Aeon+Data+Tables for a full list of the fields in the Aeon transactions table.

Aeon Web Platform Configuration

For a single server configuration, there should only be one entry in the Aeon WebPlatformConfig table. As with ILLiad, the ID field is auto-populated. The API Key must match the Aeon Web Platform entry in the ILLiad WebPlatformConfig table. However, the Base Webservice URL should match the ILLiad web platform URL. The Description field can contain anything that identifies the entry as being for the ILLiad web platform.
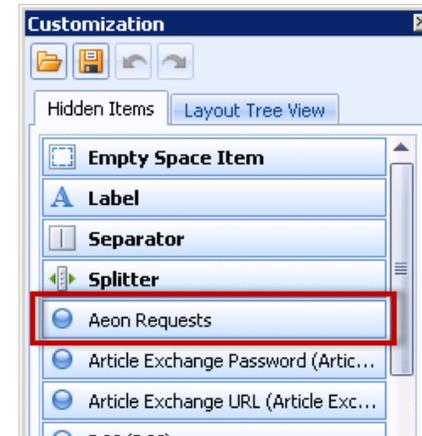

ID	API Key	Base Webservice Url	Description	
1	4a6610af-90f6-4b28-8938-b4b69fe82fb6	https://training4.atlas-sys.com:444/ILLiadWebPlatform/	Local ILLiad Platform (for access to ILLiad)	

Request Form Changes

ILLiad - In order to see the status of the Aeon transaction in ILLiad, you will need to add the Aeon Requests group to the ILLiad request form layout. To add the Aeon Requests group to the layout, enter customization mode, select the Aeon Requests option, and drag it to the form.
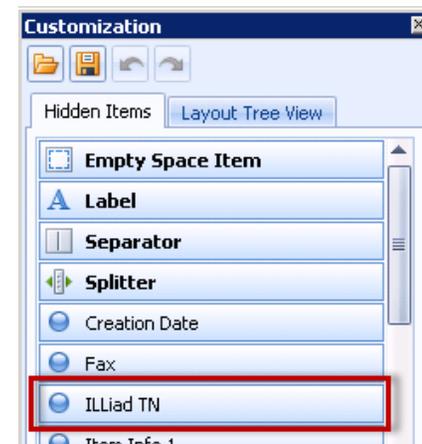
The Aeon Requests group will show the Aeon transaction number for the ILL request, the response by Special Collections staff, and the current status of the Aeon request.

Aeon – You may also need to add the ILLiad transaction number to the Aeon request form layout. From the Aeon request form, enter customization mode, select the ILLiad TN option, and drag it to the request form.

Note that if you are on Aeon 3.4 or higher, you will need to enter Layout Template Viewer mode in order to make changes to the form layout.

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Sending Requests from ILLiad

In order to send a request to Aeon, open the request form and navigate to the **Aeon ribbon**. The Aeon ribbon includes two buttons: **Request from Aeon** and **Cancel Aeon Request**. Clicking on the Request from Aeon button will display an option to initiate a **Loan** request or a **Photoduplication** request. The **Cancel Aeon Request** button will not be available until the Aeon request has been initiated.

Once an Aeon Loan or Photoduplication request has been initiated, the new transaction status for the ILLiad request will be **Awaiting Aeon Request Sending**. Once the request has been transmitted to Aeon, the transaction status will change to **Aeon Request Sent**. At this point, ILL staff will wait for Special Collections staff to approve or deny the request.

Loan Requests vs. Photoduplication Requests

In general, a **loan request** should be submitted when ILL staff will either be doing the copying or scanning to fill the request or when the materials will be shipped to the borrowing library because in either case the ILL department will be taking the materials from special collections (i.e. special collections is loaning the materials to InterLibrary Loan). A loan request can be created in Aeon regardless of whether the ILLiad request is for a loan or an article.

A **photoduplication request** should be submitted when special collections staff will be doing the copying or scanning to fill the request themselves. In this case, the ILL department is considered the patron for the Aeon photoduplication request, so an electronic file could be downloaded from the ILL department's Aeon user account.

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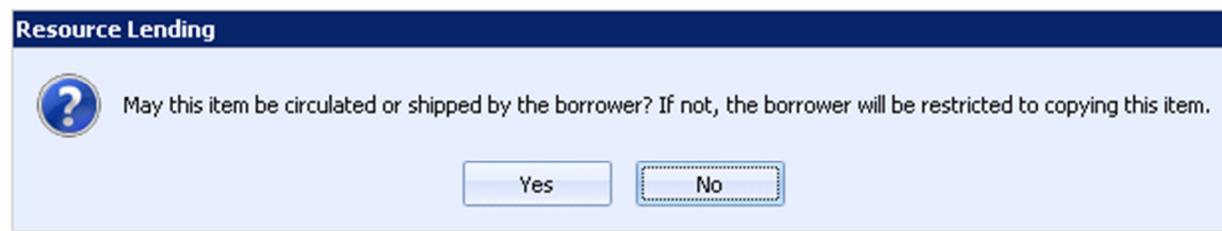*8.27.2013*

Receiving Requests in Aeon

Special Collections staff have four options for responding to ILLiad requests:

1. Approving a loan request and allowing ILL staff to lend out physical materials to the borrowing library
2. Approving a loan request and restricting ILL staff to copying materials to send to the borrowing library
3. Approving a photoduplication request and providing a copy/scan to ILL staff to send to the borrowing library
4. Canceling a request for materials that cannot be lent out or copied

Processing Loan Requests

New loan requests received from ILLiad will have a transaction status of Awaiting Request Processing in Aeon. Staff will then print out a callslip to retrieve the materials.

Once the materials have been retrieved, staff will put them on hold for ILL staff to retrieve. Placing the item on hold will trigger the Resource Lending dialog box with the option to approve the item to be circulated to the borrowing library or to restrict ILL staff to copying the item.

Note: You must use the Place on Hold button in the Next Step group on the home ribbon in the request detail form or the Batch Process option for Place on Hold in order to get the Resource Lending dialog box. If you use the Route menu to place the item on hold, you will not to get the Resource Lending dialog box and will not update the ILLiad request.

When the request is placed on hold in Aeon, the ILLiad transaction will be updated to Aeon Request Approved. ILL staff can then see whether the request was approved for lending or simply for making copies by referring to the Aeon Requests group on the transaction form.

ILL staff will retrieve the materials from special collections and special collections staff will update the Aeon request to Item Checked Out while the materials are out.

When the materials are returned from ILL, they can be reshelved in Aeon as usual.

Processing Photoduplication Requests

New photoduplication requests received from ILLiad will have a transaction status of Submitted by User and a Photoduplication Status of Awaiting Order Processing in Aeon. Staff will then print out a callslip to retrieve the materials.

Materials can then be copied or scanned to fill the order. Once staff have updated the Photoduplication Status to Item Delivered, the ILLiad transaction will be updated to Aeon Request Approved.

Special Collections staff may then reshelve the materials as usual. For electronically delivered items, scans uploaded to the directory specified by the Aeon WebDeliveryPath customization key will be deleted from the server automatically after the number of days specified in the DaysBeforeElectronicDeliveryCleanup key have been reached; at that time, the Photoduplication Status will automatically be changed to Order Finished. For items not delivered electronically, staff can manually update the order to a finished status when ILL staff pick up the copies.

Receiving Responses in ILLiad

If Special Collections staff approve the request, the ILLiad transaction status will change to **Aeon Request Approved**. If Special Collections cancel the request, the ILLiad transaction status will change to **Aeon Request Denied**. The transaction will be shown in the appropriate queue on the Lending tab, but staff can view more information about the Aeon transaction in the **Aeon Requests** group on the Aeon transaction form.

The Aeon group will indicate whether a loan request was approved for lending or only for copying. If the request to Aeon was a photoduplication request, the response will indicate that the copies are ready for pick up. The Aeon group also includes what the Aeon transaction number and current transaction status are in case they have any questions for special collections staff.

External ID	State	Response	
⊟ 330	ResponseReceived	AvailableForCopy	

	Type	Status	Status Date	
	Transaction	Item On Hold	7/12/2013	

Possible responses are:

- *Available for Copy* – ILL staff may pick up the materials to scan them.
- *Available for PickUp* – ILL staff may pick up the materials to loan them out or may pick up copies or scans.
- *Copy Ready* – ILL staff may pick up or download scans to send to borrowing library.
- *Denied* – Special Collections staff have cancelled the request.

Once the scans or materials have been picked-up, ILL staff can finish processing the lending request as usual.

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For more information on integrating ILLiad and Aeon, see our documentation.

Aeon Documentation Links:

https://prometheus.atlas-sys.com/display/Aeon/Configuring+Web+Platform+Integration+for+ILLiad+and+Aeon

https://prometheus.atlas-sys.com/display/Aeon/Using+Web+Platform+Integration+with+ILLiad+and+Aeon

ILLiad Documentation Links:

https://prometheus.atlas-sys.com/display/illiad/Configuring+Web+Platform+Integration+for+ILLiad+and+Aeon

https://prometheus.atlas-sys.com/display/illiad/Using+Web+Platform+Integration+with+ILLiad+and+Aeon

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