

Having Fun with ILLiad:

Tricks to Customize & Simplify Your Workflows



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OCLC ILLIAD INTERNATIONAL CONFERENCE
MARCH 24, 2011

Outline



- **Day-t0-Day Workflows**
- **Workflow/Project Support**
- **Your Customizations?**

Day-to-Day Workflows



- **Locally-Owned Materials**
- **Non-OCLC Requests**
- **Add-ons**
- **Book Series Queue**

Locally-Owned Materials: Electronic Copies

The screenshot displays a web-based interface for managing borrowing requests. A dropdown menu is open, listing various request types. The option 'Full Text @ UL' is highlighted with a red dashed box. The background window is titled '601003 - Borrowing Request' and includes search tabs for Google Search, Google Scholar Search, Serials Solution Citation, and WorldCat Local Search. The status bar at the bottom indicates 'Awaiting Copyright Clearance'.

ng Request

Print Request
Add to Print Queue
Print and Empty Queue

View
Send E-Mail

- ACQ
- ALA Request
- Email Author
- Full Text @ UL**
- IFM Dummy Request
- International Request
- Library Use Only
- Loan Recall
- Martin UL Book Request
- MoreInfo
- NLM Request
- On Demand Notify
- On Demand Notify - EBOOK
- Open Access
- Renewal Denied
- Renewal Granted
- Replacement Estimate
- Request Delivery
- Resend Request
- RUSH Request
- Update to Shipped

601003 - Borrowing Request

Google Search Google Scholar Search Serials Solution Citation WorldCat Local Search Edit Email Form X

ces, see citation below:

relatives of serious offenders

esses and we made it conveniently available for download from your ILLiad account, you can access it by clicking here:

system: <https://ill.ulib.iupui.edu/ILLiad/ILUP/ogon.html>

ie University Library E-Journal Home Page:

consult the Reference Desk or contact our subject librarians:

hcontact us and refer to the Transaction Number TN: 601003

how we are doing - we appreciate your feedback.

ring *****
States Code) governs the making of photocopies or other reproductions of copyrighted material. Under certain conditions specified in the law, libraries
ther reproduction. One of these specified conditions is that the photocopy or reproduction is not to be 'used for any purpose other than private study,
or later uses, a photocopy or reproduction for purposes in excess of 'fair use,' that user may be liable for copyright infringement. This institution

0007-0955

Awaiting Copyright Clearance

Borrowing

Locally-Owned Materials: Electronic Copies

System | Email | 1793763 - Borrowing Request

Borrowing Processing | OCLC | Email

Send | Change Status on Send | Process

Detail | History | OCLC | Z39.50 | PubMed/Docline | UW MadCat | UW Forward | UW Find It | Proquest Dis

Email Editing

To: |@WISC.EDU

CC:

Subject: Your Library Express request is ready

Dear PATRON,
A request you have placed:

SAE 932814 Swirl, fuel composition, localized heating, and deposit effects on engine knock location
/SAE 932814
1993
Swirl, fuel composition, localized heating, and deposit effects on engine knock location
SAE International

Transaction Number: 1793763

is available electronically. To obtain the full text, please follow the directions below:

This item is available electronically through FindIt. To obtain the full-text, search the Find It menu at <<http://digital.lib>

This item is available electronically through MadCat. Search MadCat for the journal title and select the electronic record. Once in that, use the FindIt link from within MadCat to access your article.

This article is available in IEEE Xplore. Go to <<http://www.library.wisc.edu>>, click on the databases tab, enter "IEEE" in the search box and click on IEEE Xplore. Click on Advanced Search and search for your article.

This item is available in Dissertations & Theses Full Text. Go to <<http://www.library.wisc.edu>>, click on the databases tab, enter "Dissertations & Theses Full Text" in the search box. From there you can search for this title.

This article is available through the SAE Digital Library. Go to <<http://www.library.wisc.edu>>, click on the databases tab, enter SAE in the search box and click on SAE Digital Library.

This article is available for free at the following website: (ENTER WEBSITE)

If you have a question about this request, please contact the interlibrary loan office at gzmil@library.wisc.edu.

Sincerely,
University of Wisconsin-Interlibrary Loan Department

Item Information

Call Number

Location | a |

Due Date

Reason For Cancellation

Item Num/Ref Num

ISxN

Special Instructions

Max Cost/Pieces

Awaiting Extensive Searching

Borrowing

RapidILL



Main - ILLiad Client 8.0.11.0

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

Tina's Queues (147 items)

- Awaiting ACQ Request Processing 14
- Awaiting Conditional Processing 1
- Awaiting Doc Provider Processing 4
- Awaiting Secondary Searching 1
- Awaiting Purchase 13
- Awaiting Extensive Searching 15
- Awaiting Open Access Searching 10
- Awaiting Thesis Processing 3
- Awaiting Email Response from Lender 7
- Awaiting Email Response from Patron 6
- Awaiting Unfiled Processing 73

Need Attention (23 items)

- Awaiting RAPID Local Request Processing 1
- Awaiting Request Processing 8
- In Special Collections 13
- Cancelled by Customer 1

Requests (694 items)

- Requests (1 items)
- Request in Processing 1

Complete (107698 items)

108563

Barometer Group

Group	Count
Borrowing	203
Document Delivery	14
Lending	165

System

Alert	B	D	L
Connection Manager	5	0	7
ISO Manager	0	0	0
Odyssey Manager	0	0	0
Outgoing E-Mail	0	0	0
Flagged Requests	6	0	0
RAPID Manager	0	0	0
Users To Clear	2	0	0
	13	0	7

tina/IUP

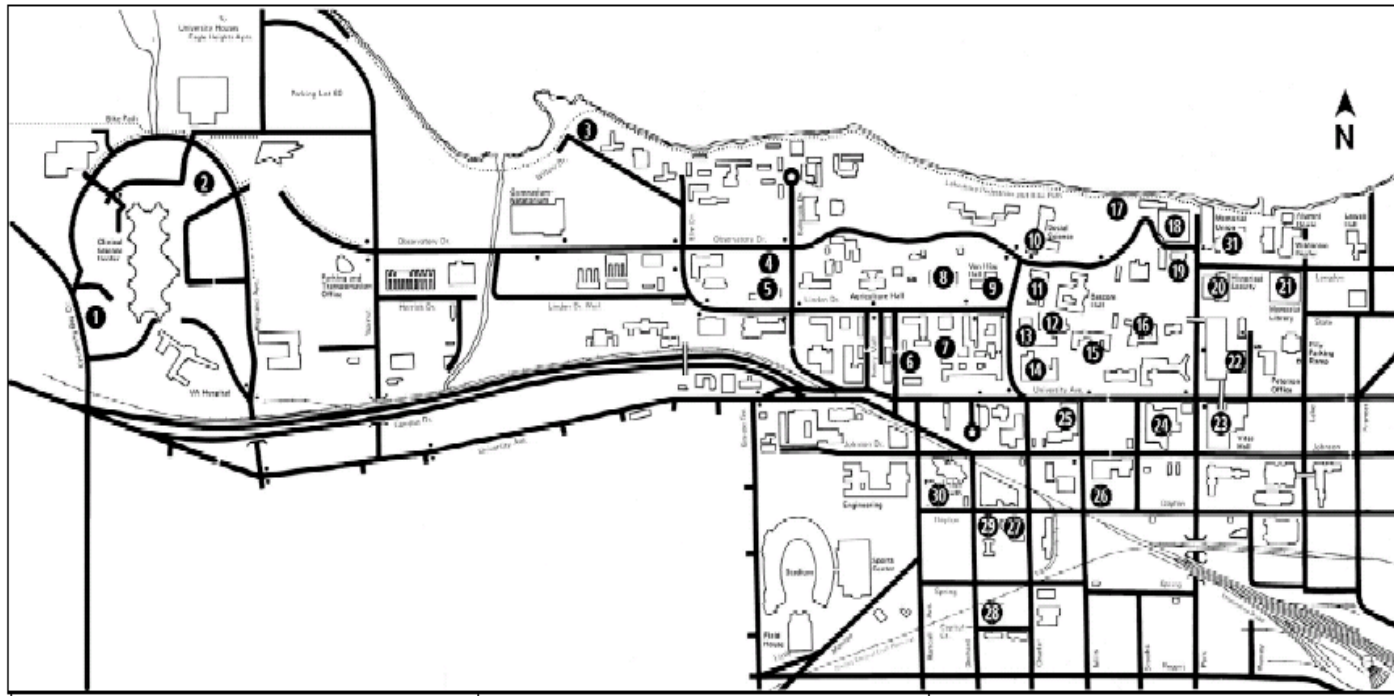
Locally-Owned Materials: Loans



- The University of Wisconsin Madison has over 40 libraries across the campus.



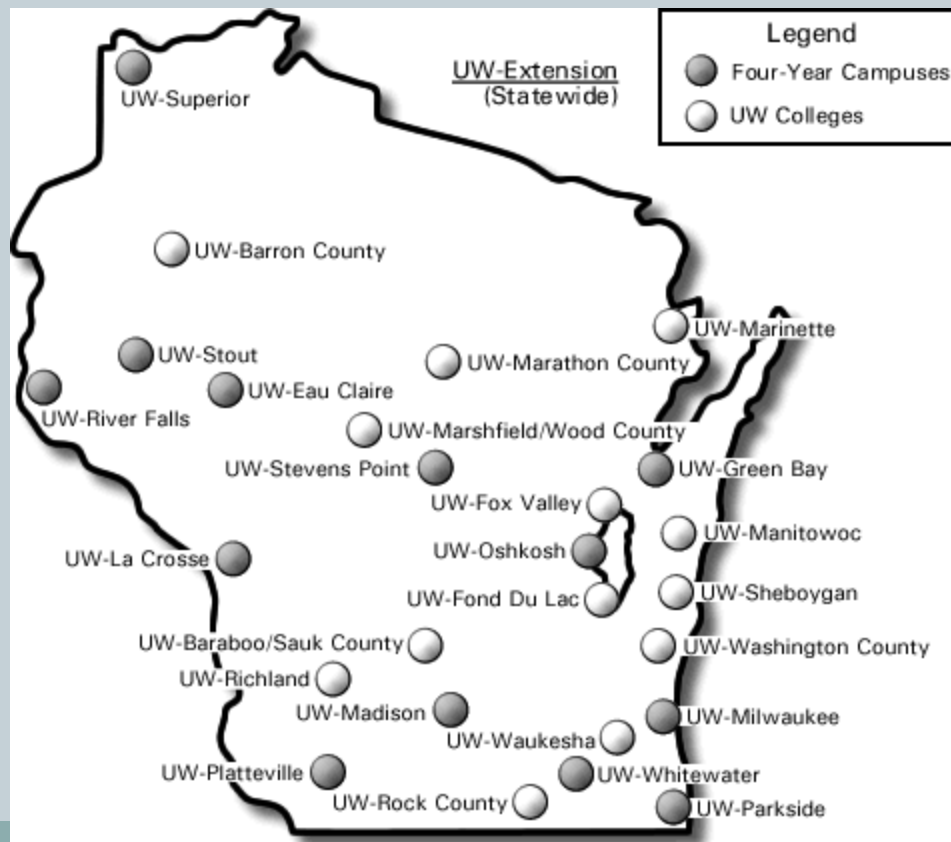
University of Wisconsin – Madison Map of Campus Libraries included in MadCat



Locally-Owned Materials: Loans



- We are also part of the University of Wisconsin System which has an additional 26 libraries.



Locally-Owned Materials: Loans



- We are able to get materials from any of these libraries using our shared catalog!

The screenshot displays the UW Madison Libraries website. At the top, the header reads "UW Madison Libraries · Forward" with a red square icon. On the right, it shows "0 Saved Items" and a "Sign in" link. The main content area features a search bar with the text "Searching 6,183,705 UW Madison Items". Below the search bar is a dropdown menu set to "Anywhere", a "Search" button, and a link to "Advanced Search". There are also radio buttons for "Search only UW Madison" (selected) and "Search all of UW System and UW Digital Collections". To the right of the search bar is a "Browse" section with links for "Languages", "Names", and "Subjects". Below the search bar is a blue banner for "UW-System Digital Collections" with the text "Browse select, locally digitized, UW System digital collections." and a grid of 18 small image thumbnails. At the bottom, there is a large white area with the "UW · FORWARD" logo and the tagline "Search just got better". On the right side of this area, there is a "Features" section with a list of bullet points: "Improved relevancy", "Easier UW-System searching", and "Tools for citing, emailing, texting, and sharing items". On the left side of the screenshot, there is a vertical sidebar with the text "Our Experiment Feedback" and a blue "Feedback" button.

Locally-Owned Materials: Loans

The screenshot shows a web application interface for managing borrowing requests. At the top, there is a navigation bar with a 'Print Request' button and a title '1799156 - Borrowing Request'. Below this is a secondary navigation bar with tabs for 'System', 'Email', and 'Email'. A 'Process' button is visible on the left, with options for 'Send' and 'Change Status on Send'. A horizontal menu contains various search and database links: 'Detail', 'History', 'OCLC', 'Z39.50', 'PubMed/Docrine', 'UW MadCat', 'UW Forward', 'UW Find It', 'Proquest Dissertation Abstracts', 'LinkCat', 'Google Search', 'Amazon Books', and 'Edit Email Form'. The main content area is titled 'Email Editing' and contains an email form with the following fields:

- To:** AWINKELMAN@WISC.EDU
- CC:** (empty)
- Subject:** Interlibrary Loan Request Update

The email body contains the following text:

Dear AMY WINKELMAN,
A request you have placed:

VOYA interview with Nancy Garden
Chelton, Mary K
1990

Transaction Number: 1799156

is available from a UW System library. A request for it has been placed on your behalf using MadCat's UW System Search (<http://digital.library.wisc.edu/1711.web/uwsystemsearch>). You will be notified when the book is available.

is available from a UW-Madison library. A request for it has been placed on your behalf using MadCat's Place Requests button. You will be notified when the book is available.

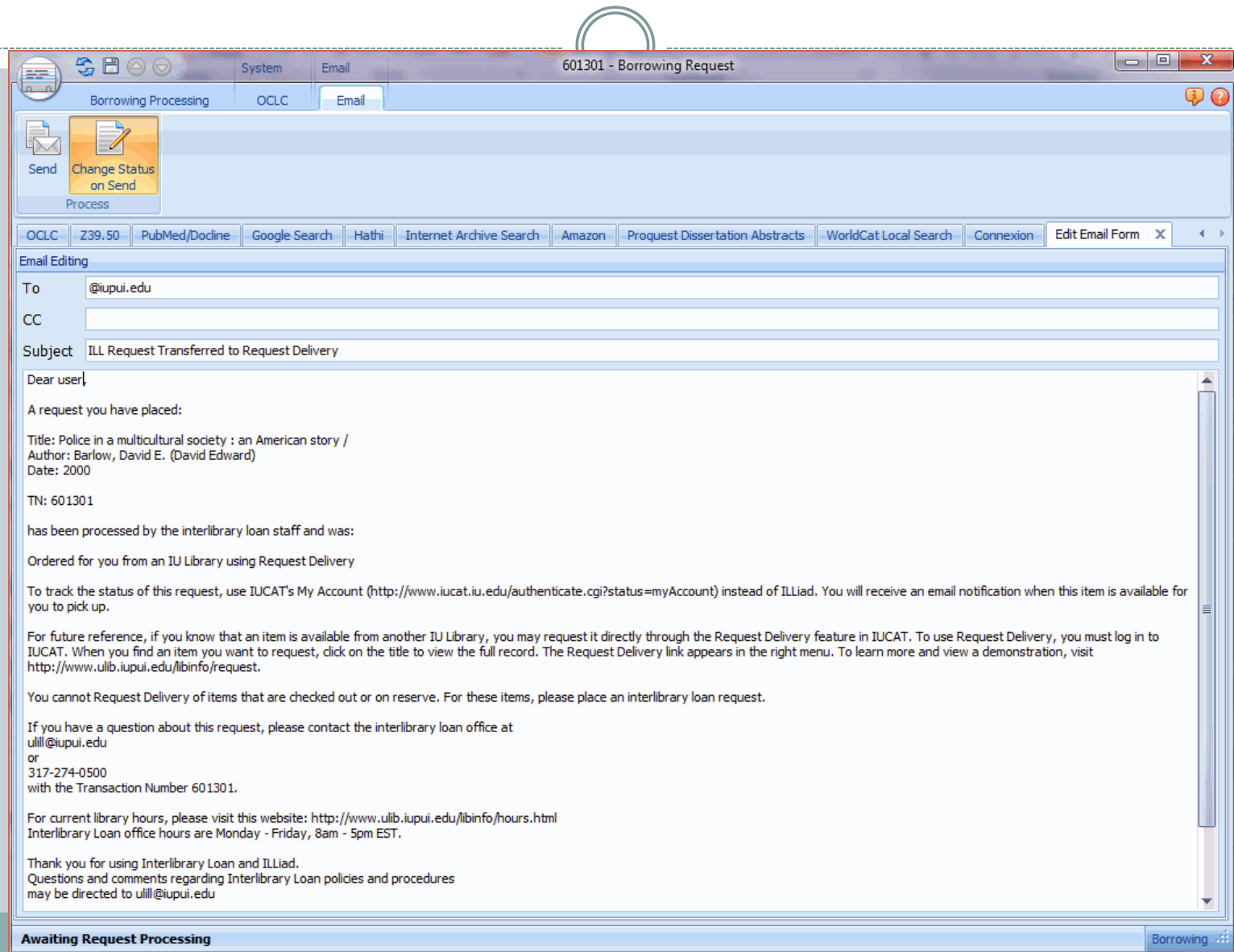
will be purchased by the library and added to its collection. You will be notified by e-mail when it is available.

If you have a question about this request, please contact the interlibrary loan office at gzmil@library.wisc.edu.

Sincerely,
University of Wisconsin-Interlibrary Loan Department

At the bottom of the page, there are two buttons: 'OAP1 ID Card' and 'Overdue - First'.

Locally-Owned Materials: Loans



The screenshot shows a web-based email interface. The window title is "601301 - Borrowing Request". The interface includes a toolbar with "Send" and "Change Status on Send" buttons, and a "Process" button. Below the toolbar is a navigation bar with various search and system links: OCLC, Z39.50, PubMed/Docline, Google Search, Hath, Internet Archive Search, Amazon, Proquest Dissertation Abstracts, WorldCat Local Search, Connexion, and Edit Email Form. The main content area is titled "Email Editing" and contains the following text:

To: @iupui.edu

CC:

Subject: ILL Request Transferred to Request Delivery

Dear user,

A request you have placed:

Title: Police in a multicultural society : an American story /
Author: Barlow, David E. (David Edward)
Date: 2000

TN: 601301

has been processed by the interlibrary loan staff and was:

Ordered for you from an IU Library using Request Delivery

To track the status of this request, use IUCAT's My Account (<http://www.iucats.iu.edu/authenticate.cgi?status=myAccount>) instead of ILLiad. You will receive an email notification when this item is available for you to pick up.

For future reference, if you know that an item is available from another IU Library, you may request it directly through the Request Delivery feature in IUCAT. To use Request Delivery, you must log in to IUCAT. When you find an item you want to request, click on the title to view the full record. The Request Delivery link appears in the right menu. To learn more and view a demonstration, visit <http://www.ulib.iupui.edu/libinfo/request>.

You cannot Request Delivery of items that are checked out or on reserve. For these items, please place an interlibrary loan request.

If you have a question about this request, please contact the interlibrary loan office at ulill@iupui.edu or 317-274-0500 with the Transaction Number 601301.

For current library hours, please visit this website: <http://www.ulib.iupui.edu/libinfo/hours.html>
Interlibrary Loan office hours are Monday - Friday, 8am - 5pm EST.

Thank you for using Interlibrary Loan and ILLiad.
Questions and comments regarding Interlibrary Loan policies and procedures may be directed to ulill@iupui.edu

At the bottom of the window, there is a status bar with "Awaiting Request Processing" on the left and "Borrowing" on the right.

Non-OCLC Requests: ALA

The screenshot displays the Borrowing Processing system interface. A central window titled "Email Editing" is open, showing the details of an email being composed. The "To" field is highlighted with a red oval. The email content includes request information, a loan request for a playbill, and a note about the request's compliance with copyright law.

System Navigation: Borrowing Processing, OCLC, Email, Process (Send, Change Status on Send)

Buttons: Cancel Request, Request Sent, Route, Route To Document Delivery, Next Step, Routing

Request Details: Transaction Number: 1799072, Username, Transaction Date: 2/21/2011 4:47 PM, Delivery Method: Hold for Pickup, Service Level: Regular, Billing Account

Article Info: Title: [Playbill for The woman hater's club], Author: Hobart, George V, Publisher: s.n., Place: [Boston], Date: 1912, Edition, Original Loan Author, Original Loan Title

Loan Info: Loan, Author: Hobart, George V, Title: [Playbill for The woman hater's club, newest European musical comedy, the biggest novel], Publication Information: Place: [Boston], Publisher: s.n., Date: 1912, Article, Journal Title, Article Author, Article Title, Volume, Issue, Date, Pages

Email Content:

Request sent on 2/22/2011 9:52:23 AM
Authorized by Heather Weltin

From: Memorial Library Interlibrary Loan
University of WI-Madison
728 State Street, Room b106d
Madison, Wisconsin 53706-1494

Phone: (608) 262-1193
Ariel: 128.104.63.200
OCLC Symbol: GZM
gzmill@library.wisc.edu

Please lend or copy the following item:
TN: 1799072

OCLC Number: 270900248

ISSN/ISBN:

Request Complies with: 108(g) (2) Guidelines (CCG) or Other provisions of copyright law (CCL)

MaxCost \$65.00.

Please contact us if you are not able to fill this request or with any questions you may have.

Sincerely,
University of Wisconsin Interlibrary Loan Department

Right Panel: Search, Amazon Books, 270900248, OCLC, Information, For Cancellation, n/Ref Num, Instructions, t/Pieces, Information, firstsearch.oclc.org:WorldCat

Non-OCLC Requests: NLM

Borrowing Request

Billing User Printing System

Print Request
Add to Print Queue
Print and Empty Queue

Pending Updates Import Resubmit

Serials Solution Citation WorldCat Local Search

Other Information

Record Number:

Bib Number: 9109791

Lending String: nlm

Lender: nlm

System ID: OTH

OCLC Status:

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

Added By: System

Item Information

Call Number: W1 MI642K

Location: General Collection

Due Date:

Reason For Cancellation:

Item Num/Ref Num:

ISxN: 1121421X

Special Instructions:

Max Cost/Pieces: 1

Citation Information

Cited In:

Title:

Date:

Volume/Pages:

Borrowing Processing

Email

Send Change Status on Send

Detail History OCLC Z39.50 PubMed/Dodline Google Search Google Scholar Search Serials Solution Citation

Email Editing

To: custserv@nlm.nih.gov

CC:

Subject: Interlibrary Loan Request

TN: 596349

Request Type: Article

From:
Interlibrary Loan
IUPUI University Library NLM LIBID: INUCJH OCLC: IUP
755 West Michigan St
Indianapolis, IN 46202-5195
Phone: 317-274-0500
ARIEL: 134.68.173.15
E-Mail: ulill@iupui.edu

Author: De Luca, L ,
Book or Journal Title: Minerva gastroenterologica e dietologica
Article Title: Is smoking a prognostic factor in patients with chronic hepatitis C?
Article Volume, No.: 55, 2
Article Year: 2009
Article Pages: 139-43

Verified In:
Call No.: W1 MI642K
Location: General Collection
NLM Unique ID: 9109791

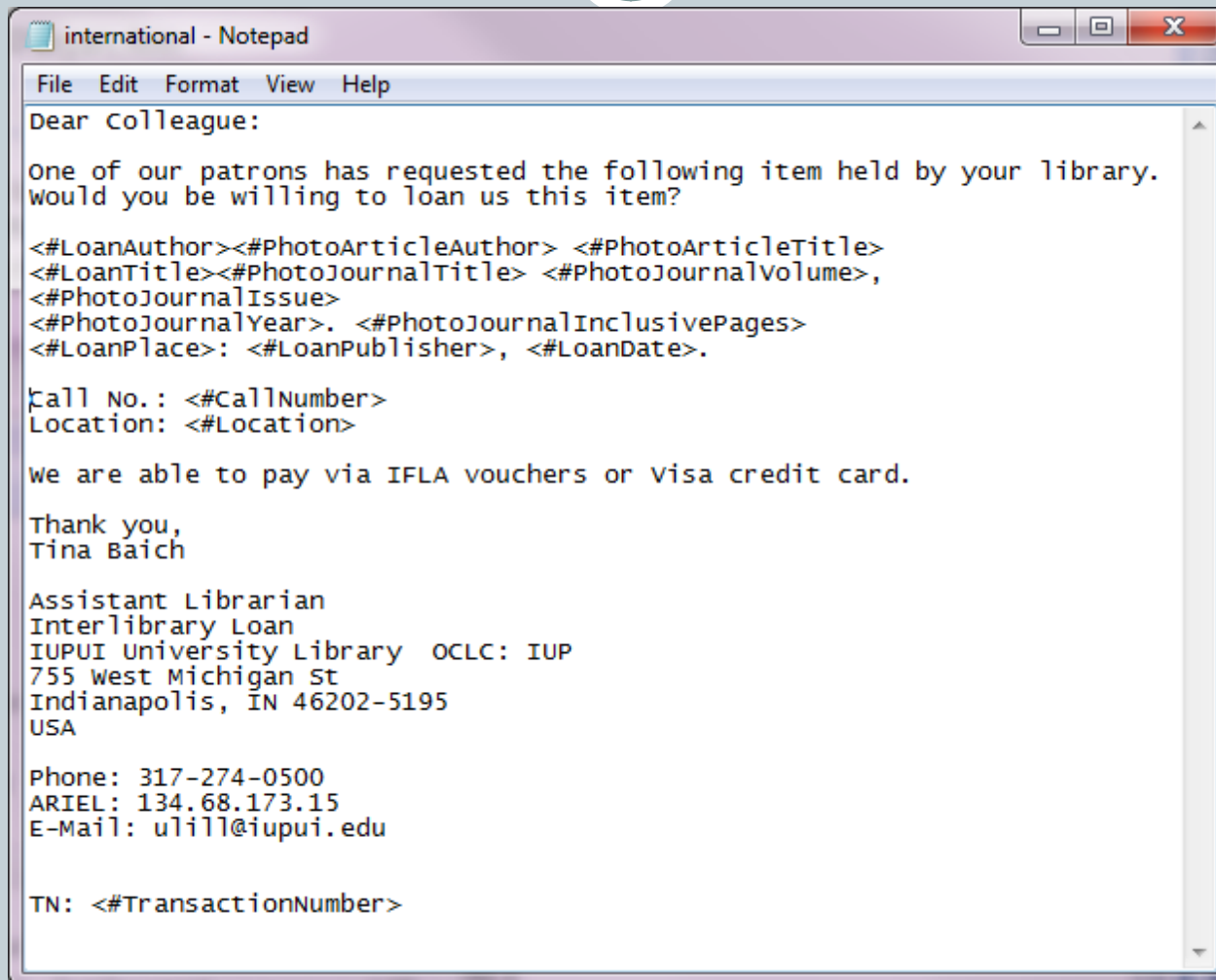
Copyright Compliance:
Can you provide?

Will Pay Maximum Cost of \$25.00

To:
National Library of Medicine
Circulation and Control Section
8600 Rockville Pike
Bethesda, MD 20209
Fax: 301-496-2809
E-Mail: custserv@nlm.nih.gov

Tina Baich, ILL Librarian, authorizes this interlibrary loan request.

Non-OCLC Requests: International



Non-OCLC Requests: Authors

Other Information

Record Number

Bib Number

Lending String

Lender

System ID

OCLC Status

author - Notepad

File Edit Format View Help

Dear <#PhotoArticleAuthor>:

I am writing from the interlibrary loan department of Indiana University-Purdue University Indianapolis. One of our patrons has requested your <#PhotoJournalYear> <#PhotoJournalTitle> paper, "<#PhotoArticleTitle>." Have you published this paper somewhere? If not, would you be willing to send an electronic copy for our patron's research use?

I appreciate any help you can offer.

Thank you,
Tina Baich

Assistant Librarian
Interlibrary Loan
IUPUI University Library
755 West Michigan St
Indianapolis, IN 46202-5195
Phone: 317-274-0500
E-Mail: ulill@iupui.edu

TN: <#TransactionNumber>

Book Series Custom Queue

System 1799607 - Borrowing Request Main - ILLiad Client 8.0.11.0

Borrowing Processing OCLC

Cancel Request Renew Request Send Delivery Notification Process Route Route To Document Delivery Routing Gateway Search Remove Payment Order Status Copyright Policies Directory OCLC Billing Billing View Send E-Mail User Print Request Add to Print Queue Print and Empty Queue Printing Pending Updates Import into Resubmission System

Detail History OCLC Z39.50 PubMed/Dodine UW MadCat UW Forward UW Find It Proquest Dissertation Abstracts Google Scholar Search Google Search

General Request Information

Transaction Number: 1799607 Article Loan Username: 90321701941 Wanted By: Transaction Date: 2/22/2011 11:08 AM Not Wanted After: Delivery Method: Hold for Pickup Site: Service Level: Regular Shipping Options: Billing Account: Doc Type: Article

OCLC Information

ILL Number: OCLC Number: 24839341 Lending String: Lender: System ID: OCLC OCLC Status:

Article Info Loan Info Collections Local Holdings Imported Request User Copyright

Journal Title: Methods in molecular biology. Volume/Issue: 563 Month/Year/Pages: 1984 Article Author: Article Title: Proben networks Original Journal Title: Item Author/Publisher: Item Place/Edition:

Priority Shipping Ariel Special Instructions Max Cost/Pieces 3745

Date Note Type Added By Citation Information

**Should really be
Protein Networks and
Pathways Analysis
(OCLC #310401023)**

Thesis Request Processing



The screenshot shows a web-based email interface. At the top, the window title is "601057 - Borrowing Request". Below the title bar, there are navigation tabs for "Borrowing Processing" and "Email". A toolbar contains icons for "Send" and "Change Status on Send". A search bar at the top lists various databases: OCLC, Z39.50, PubMed/Dodline, Google Search, Hathi, Internet Archive Search, Amazon, Proquest Dissertation Abstracts, WorldCat Local Search, Connexion, and Edit Email Form. The main content area is titled "Email Editing" and contains the following text:

To:

CC:

Subject: Interlibrary Services Delivery Notice

Dear Dave Taylor,

The following item that you requested through Interlibrary Services was found freely available on the internet:

Title: Hardiness and homelessness: A strengths-based perspective of service use by veterans who are homeless.
Author: Petrovich, James
Year: 2009

We have made it conveniently available for download from your ILLiad account. You can access it by clicking here: <https://ill.ulib.iupui.edu/IUPpdf/601057.pdf>
or by logging into your ILLiad account:
<https://ill.ulib.iupui.edu/ILLiad/IUP/logon.html>

You can also view the item at the following URL:

If you have any questions about this service, please contact us and refer to the Transaction Number TN: 601057.

Thank you for using the ILS Service, please let us know how we are doing, we appreciate your feedback.

Sincerely,
Interlibrary Services (ILS) Staff

Please email us at: ull@iupui.edu or Tel: 317-274-0500

At the bottom left, it says "Awaiting Thesis Processing" and at the bottom right, there is a "Borrowing" button.

Workflow/Project Support



- **Purchase on Demand/Unfilled Purchase Program**
- **Non-ILL Staff Processing Queues**
- **Special Returns**
- **Library Use Only Items**
- **Lost Billing Workflows**
- **Open Access Searching**

Purchase on Demand Program



- **IUPUI University Library Criteria**
 - Published in current year or 3 previous years
 - Price limit of \$100
 - Paperback and DVD are preferred format
 - Will purchase e-book if user indicates acceptable
 - Will not purchase textbooks, test prep or computer manuals, audio CDs, popular titles outside scope of collection

Purchase on Demand Custom Routing

Main - ILLiad Client 8.0.11.0

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

Find's Queues (02 items)

Awaiting ACQ Request Processing	2
Awaiting Doc Provider Processing	1
Awaiting Purchase	17
Awaiting Extensive Searching	1
Awaiting Open Access Searching	9
Awaiting Thesis Processing	1
Awaiting Email Response from Lender	8
Awaiting Email Response from Patron	12
Awaiting Unfilled Processing	10

Barometer Group

Group	Value
Group 1	97
Group 2	11
Group 3	85

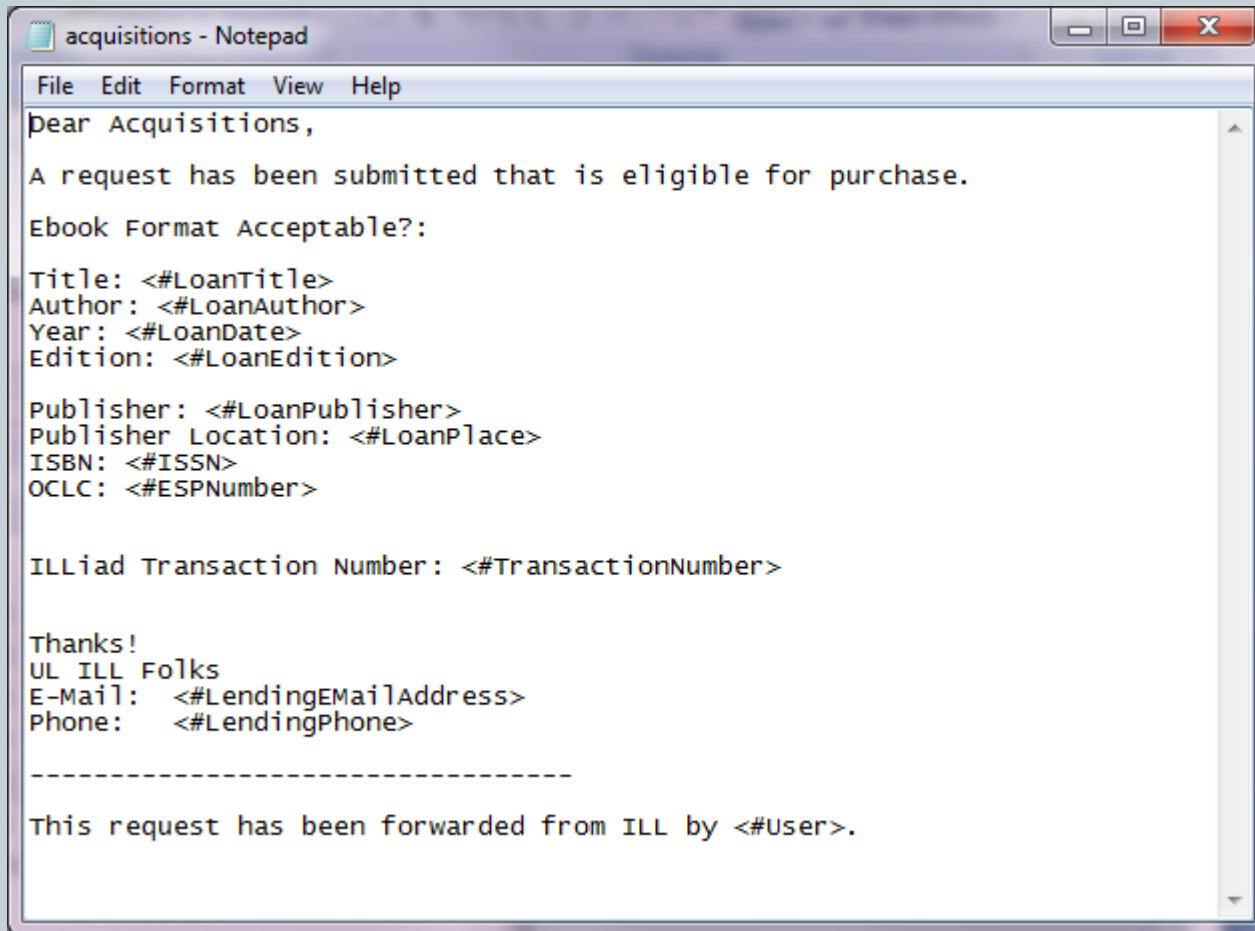
Edit Row

RuleNo	18
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	t.RequestType = 'Loan' and (t.LoanDate like '%2008%' or t.LoanDate like '%2009%' or t.LoanDate...
NewProcessType	Borrowing
NewTransactionStatus	Awaiting ACQ Request Processing
RuleDescription	This moves loan requests published in the current or last three years to a special queue for ACQ pur...

109408 14 0 45

tina/IUP

Purchase on Demand Custom Email to ACQ



```
acquisitions - Notepad
File Edit Format View Help
Dear Acquisitions,

A request has been submitted that is eligible for purchase.

Ebook Format Acceptable?:

Title: <#LoanTitle>
Author: <#LoanAuthor>
Year: <#LoanDate>
Edition: <#LoanEdition>

Publisher: <#LoanPublisher>
Publisher Location: <#LoanPlace>
ISBN: <#ISSN>
OCLC: <#ESPNumber>

ILLiad Transaction Number: <#TransactionNumber>

Thanks!
UL ILL Folks
E-mail: <#LendingEmailAddress>
Phone: <#LendingPhone>

-----

This request has been forwarded from ILL by <#User>.
```

Purchase on Demand Program



- Upon receipt, items are rush cataloged and processed in bindery
- ILL checks in item, places and traps hold in ILS, and notifies customer using custom email

Purchase on Demand Custom Email to User

purchase - Notepad

File Edit Format View Help

Dear <#FirstName> <#LastName>

Responding to your recent ILL request placed through ILLiad, University Library has acquired this book as part of a trial project for on-demand, rapid delivery book purchases.

The title you requested has arrived, has been cataloged, and is now available for checkout at the circulation desk on the 2nd floor of University Library. It will be held there for 14 days.

Loan Title: <#LoanTitle>

Loan Author: <#LoanAuthor>

TN: <#TransactionNumber>

You will be checking this book out like you would any other book in the library's collection, including requesting renewals through IUCAT's 'My Account' section.

You will now see this request in your request history in ILLiad.

Your feedback is important to us for determining the success of this project. You can reply to this email and leave your feedback, and if you would like to leave anonymous feedback, you may do so by sending it to us in campus mail, attn: Tina Baich, UL 1115R.

(1) Did this book arrive in time to meet your needs?

YES / NO

(2) In your opinion, what is the usefulness of this book as a permanent addition to University Library's collection?

Very Useful
Moderately Useful
Marginally Useful

(3) Other comments you have about this trial service, or any other comments relating to Interlibrary Loan:

Thank You!

For current library hours, please visit this website:
<http://www.ulib.iupui.edu/libinfo/hours.html>
Interlibrary Loan office hours are <#BorrowingHours>.

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

epurchase - Notepad

File Edit Format View Help

Dear <#FirstName> <#LastName>

Responding to your recent ILL request placed through ILLiad, University Library has acquired this book as part of a trial project for on-demand, rapid delivery book purchases.

An electronic version of the title you requested was purchased. You may access the item here: [PASTE URL HERE]

Loan Title: <#LoanTitle>

Loan Author: <#LoanAuthor>

TN: <#TransactionNumber>

You will now see this request in your request history in ILLiad.

Your feedback is important to us for determining the success of this project. You can reply to this email and leave your feedback, and if you would like to leave anonymous feedback, you may do so by sending it to us in campus mail, attn: Tina Baich, UL 1115R.

(1) Did this book arrive in time to meet your needs?

YES / NO

(2) Did the electronic version of this book meet your needs?

YES / NO

(2) In your opinion, what is the usefulness of this book as a permanent addition to University Library's collection?

Very Useful
Moderately Useful
Marginally Useful

(3) Other comments you have about this trial service, or any other comments relating to Interlibrary Loan:

Thank You!

For current library hours, please visit this website:
<http://www.ulib.iupui.edu/libinfo/hours.html>
Interlibrary Loan office hours are <#BorrowingHours>.

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

Unfilled Purchase Program



- **Unfilled material that:**
 - Does not circulate from any library
 - Costs under \$20 to purchase
 - Can be any format!

Unfilled Purchase Program

1796669 - Borrowing Request

Process

Send Change Status on Send

Detail History OCLC Z39.50 PubMed/Docline UW MadCat UW Forward UW Find It Proquest Dissertation Abstracts LinkCat Google Search Amazon Books Edit Email Form X

Email Editing

To: tsorders@library.wisc.edu

CC:

Subject: ILL Express

We would like the following item purchased for \$20 or under through the ILL Express Program:

Loan Author: Kingston, Maxine Hong.
 Loan Title: I love a broad margin to my life /
 OCLC number: 607975655
 Shelving Library: *UIU,IUL,GZG,JBL,IMD

Patron information:
 Patron Name:
 ID:
 Pickup Library:

This was ILLiad Transaction Number: 1796669

Thank you,
 University of Wisconsin-Interlibrary Loan Department

Law Document Delivery	Added By	Citation Information
Math Document Delivery	System	Cited In
Memorial Document Delivery	rcroushore	firstsearch.ocd.org:WorldCat
MFRIT Document Delivery		Title

rick MacIver

Non-ILL Staff Processing Queues



Borrowing Processing | Email | 1798742 - Borrowing Request

Send | Change Status on Send

Detail | History | OCLC | Z39.50 | PubMed/Docrine | UW MadCat | UW Forward | UW Find It | Proquest Dissertation Abstracts | Google Scholar Search | Google Search | Edit Email Form X

Email Editing

To: eblinglibx@library.wisc.edu

CC:

Subject: Memorial Document Delivery Request

Memorial Library received the following article:

Article Title: Subcortical functions in language: a working model.
Article Author: Crosson,
Journal Title: Brain and language
Journal Volume: 25
Journal Issue: 2
Journal Month/Date:
Journal Year: 1985
Pages: 257-292
TN: 1798742

Call Number: Q 7B721
Location: ebling

Instructions:
-Save this file in the R:\OdysseyHelper\Memorial\DocDel\

If you have questions please contact the ILL staff at gzmil@library.wisc.edu or 262-1193.

Thank you,

Memorial Library
University of Wisconsin-Interlibrary Loan Department

Volume/Pages | GZM

Give to Supervisor & Special Returns

The screenshot displays a library management software interface. At the top, there are tabs for 'Borrowing Processing' and 'OCLC'. Below these are various action buttons such as 'Cancel Request', 'Request Sent', 'Route', 'Route To Document Delivery', 'Gateway Search', 'Remove Payment', 'Order Status', 'Policies Directory', 'Billing', 'View', 'Send E-Mail', 'Print Request', 'Add to Print Queue', 'Print and Empty Queue', 'Pending Updates', and 'Import into Resubmission System'. A 'Route' dropdown menu is open, showing a list of processing options. The option 'Give to Supervisor' is highlighted in yellow. A red arrow points from the bottom of the menu to the 'Give to Supervisor' button at the bottom left of the interface. The main area of the interface contains a form for 'Article' information, including fields for 'Article', 'Lending String', 'Lender', 'System ID', 'OCLC Status', 'Item Information', and 'Citation Information'. A table at the bottom right shows a list of items with columns for 'Type' and 'Added By'.

Type	Added By
Staff	mumhoefer
System	System
User	90324780760

Library Use Only Items

The screenshot displays the ILLiad Customization Manager interface. The main window is titled "Custom Request Search - ILLiad Client 8.0.11.0". The interface includes a navigation pane on the left with various menu items like "Home", "Borrowing", "Document Delivery", "Lending", "System", and "Search". The "Search" tab is active, showing a search filter configuration. The filter is defined as:

And +

- [Transactions.Transaction Status] Equals In Special Collections
- [Transactions.Due Date] Is less than or equal to 4/20/2010

Below the filter configuration, there is a table of default values for the search results:

DefaultToName	
DefaultCCAddress	
DefaultSubject	Requested loan has arrived for library use only
DefaultFromAddress	ulill@iupui.edu
DefaultFromName	IUPUI University Library ILL
DefaultStatus	In Special Collections
FileNameLoan	illoanspeccol.txt
FileNameArticle	
NVTGC	IUP

Lost Billing Workflows



- **Borrowing**

- Replacement Estimate email
- Pre-bill User Notice email

- **Lending**

- Pre-bill Library Notice email
- Request Bill for Lost or Damaged Items email

Google Custom Queue



Main - ILLiad Client 8.0.11.1

Home Borrowing Document Delivery Lending System

Number TN
User Information ALL
Citation Information LT

Search Requests

Username
Name
ID

Search Users

Symbol
Name
Address

Main

Borrowing Document Delivery Lending

- Requests (7 items)

Check Google	1
Awaiting Doc Provider Processing	1
Awaiting Request Processing	3
Request in Processing	2

+ No Work Needed (399560 items)

- Author Emailed (1 items)

Awaiting Email Response from Author	1
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+ Circulation Staff (31 items)

Open Access Searching



Main - ILLiad Client 8.0.11.0

Home Borrowing Document Delivery Lending System

Number ALL Search Requests
 User Information ALL
 Citation Information ALL

Username Search Users
 Name Search
 ID Search

Symbol Search Addresses
 Name Search
 Address Search

Main

Borrowing Document Delivery Lending

Tina's Queues (147 items)

- Awaiting ACQ Request Processing 13
- Awaiting Conditional Processing 2
- Awaiting Doc Provider Processing 4
- Awaiting Secondary Searching 1
- Awaiting Purchase 13
- Awaiting Extensive Searching 16
- Awaiting Open Access Searching 10
- Awaiting Thesis Processing 3
- Awaiting Email Response from Lender 7
- Awaiting Email Response from Patron 6
- Awaiting Unfiled Processing 72

Need Attention (60 items)

- Awaiting Copyright Clearance 37
- Awaiting Request Processing 10
- In Special Collections 13

Requests (684 items)
 Complete (107734 items)

108625

Barometer Group

Group	Count
Borrowing	221
Document Delivery	10
Lending	133

System

Alert	B	D	L
Connection Manager	5	0	8
ISO Manager	0	0	0
Odyssey Manager	0	0	0
Outgoing E-Mail	0	0	0
Flagged Requests	6	0	0
RAPID Manager	0	0	0
Users To Clear	2	0	0

13 0 8

tina/IUP

Open Access Searching Using Addons

The screenshot shows the ILLiad Client 8.0.11.0 interface. The 'Manage Addons' window is open, displaying a list of addons and their settings. A red dashed box highlights the 'Manage Addons' button in the top menu and the 'Google Scholar Search' addon in the list. The 'Google Scholar Search' addon is selected, and its settings are displayed in the bottom panel.

Name	Author	Version	Active	Description
Getting It System Toolkit	IDS Project	1.0	<input type="checkbox"/>	The GIST addon does a GIST search for an ISBN for loans based on the LoanTitle.
Getting It System Toolkit	IDS Project	1.0	<input type="checkbox"/>	The GIST addon does a GIST search for an ISBN for loans based on the LoanTitle.
GOBI	IDS Project	1.0	<input type="checkbox"/>	The GOBI addon does a GOBI search for the ISBN for loans.
Google Scholar Search	Atlas Systems, Inc.	1.1	<input checked="" type="checkbox"/>	Performs a Google Scholar search for the PhotoArtideTitle for articles.
Google Search	Atlas Systems, Inc.	1.1	<input checked="" type="checkbox"/>	Performs a generic Google search for the LoanTitle for loans and the PhotoArtideTitle for articles.
Hathi Trust Catalog	IDS Project	1.1	<input checked="" type="checkbox"/>	This Addon does an ISBN or Title search. ISBN will be run if one is available.
Internet Archive Search	Simmons College Li...	1.1	<input checked="" type="checkbox"/>	Performs a search of internet archive for a loans' LoanTitle.
Netflix Search	Atlas Systems, Inc.	1.1	<input type="checkbox"/>	Searches Netflix for a request's Loan Title if the request is a Loan and has a process type of Borrowing or Doc Del.
Proquest Dissertation S...	University of Cincin...	1.1	<input checked="" type="checkbox"/>	Performs an Advanced title search for the LoanTitle for loans on Proquest Dissertation Abstracts.

Name	Author	Version	Active	Description
Alibris Book Searches	Atlas Systems, Inc.	1.0	<input type="radio"/> Yes <input checked="" type="radio"/> No	Performs an Alibris for Librarians search for loans.

Setting Name	Value	Type	Description
AutoSearch	<input checked="" type="checkbox"/>	boolean	Defines whether the search should be automatically performed when the form opens.
IncludeAuthor	<input checked="" type="checkbox"/>	boolean	Defines whether the search should include the author in addition to the title when searching.

Addons for Open Access

The screenshot shows a web browser window with the following elements:

- Browser Tabs:** System, Script, 600964 - Borrowing Request.
- Browser Address Bar:** Borrowing Processing, OCLC, Internet Archive Search.
- Browser Navigation:** Back, Forward, Stop, Refresh buttons.
- Browser Tabs:** Detail, History, OCLC, Z39.50, PubMed/Docline, Google Search, Hathi, Internet Archive Search, Amazon, Proquest Dissertation Abstracts, WorldCat Local Search.
- Internet Archive Header:** "Universal access to all knowledge" logo and navigation menu (Web, Moving Images, Texts, Audio, Software, Patron Info, About IA, Projects).
- Search Bar:** Search: A history of modern philosophy. Media Types: All Media Types. GO! button. Advanced Search link. Anonymous User (login or join us). Upload button.
- Search Results:**
 - Search Results:** Results: 1 through 16 of 16 (0.058 secs). You searched for: A history of modern philosophy. (From the renaissance to the present). [Advanced search](#)
 - Result 1:** [A History of Modern Philosophy: \(From the Renaissance to the Present\)](#) - Benjamin Chapman Burt. Book digitized by Google from the library of the University of Michigan and uploaded to the Internet Archive by user tpb. Downloads: 76.
 - Result 2:** [A History of Modern Philosophy: \(From the Renaissance to the Present\)](#) - Benjamin Chapman Burt. Book digitized by Google from the library of the University of California and uploaded to the Internet Archive by user tpb. Downloads: 74.
 - Result 3:** [A History of Modern Philosophy: \(From the Renaissance to the Present\)](#) - Benjamin Chapman Burt. Book digitized by Google from the library of the University of Michigan and uploaded to the Internet Archive by user tpb. Downloads: 96.
- Sort results by:** > Relevance, [Average rating](#), [Download count](#), [Date](#), [Date added](#).
- Group results by:** > Relevance, [Mediatype](#), [Collection](#).
- Define your search:** (partially visible)

At the bottom of the browser window, there is a status bar with the text "Awaiting Open Access Searching" and a "Borrowing" button.

Open Access Processing



- **Establish a lender address**
- **Create a custom email**
- **Create email routing rule**

Add Lender Address



Address

Import Docline Requests

Update Docline Requests

Print Stacks Search Items

Update Stacks Search Results

Odyssey Scanning

Print Shipping Labels

Print Secondary Items

Overdues

Lending Returns

Move Invoices to Print Queue

Empty Invoice Print Queue

Home

open (1) - Lender Address

Change Password

Add Request

Policies Directory

Delete

Append Address

Clear Print Queue

Lender Information

Requests

General Information

Symbol open Address Number 1

Library Blocked

Library Name Open Access

Phone Fax

Odyssey Address

Override Trusted Sender Override Outgoing

Ariel Address

EMail Address

Shipping Information

Shipping Address World Wide Web

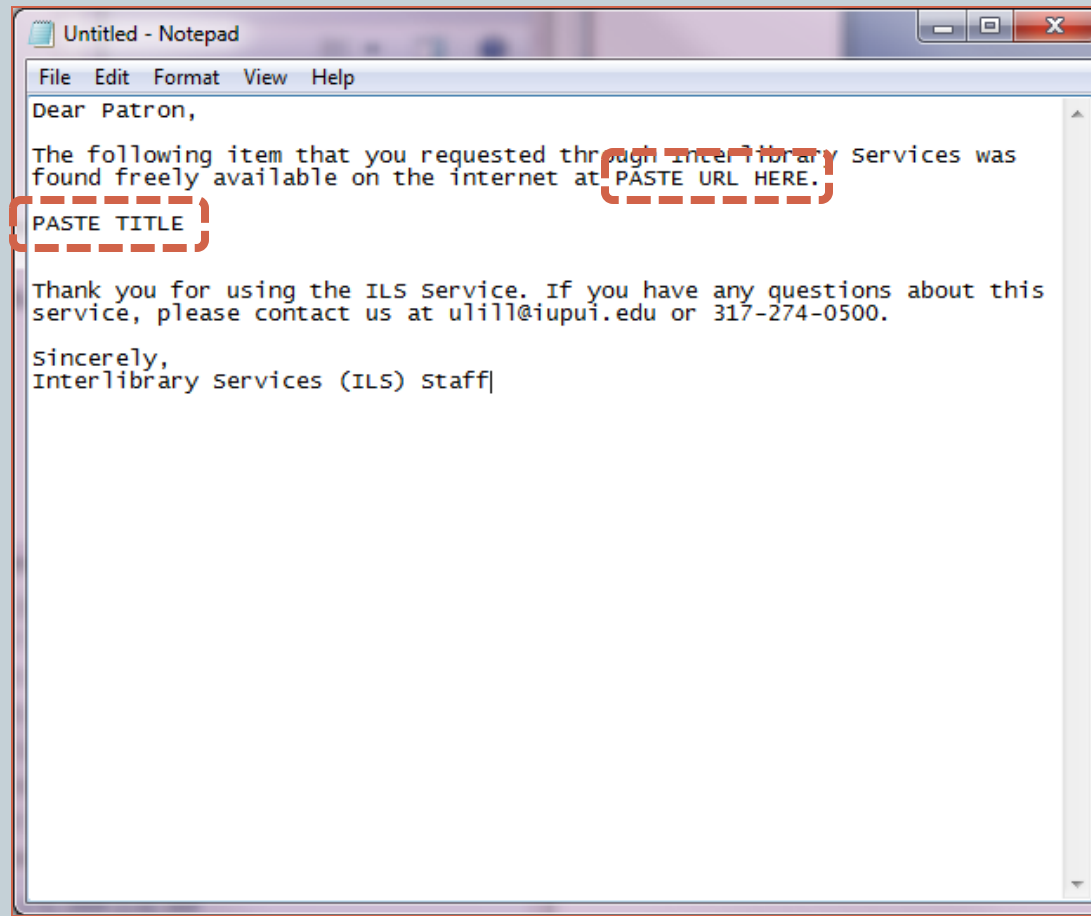
Default Shipping

Priority Shipping

ISO Information

ISO Enabled

Custom Email



Email Routing Rule



EmailRouting

ProcessType	Name	DefaultToAddress	DefaultToName	DefaultCCAddress	DefaultSubject
Lending	Special Collections Request	speccoll@iupui.edu			ILL Request
Borrowing	ACQ	acqdept@iupui.edu			ILL request
Borrowing	On Demand Notify				ILL Request
Lending	Lost or Damaged Items	mradican@iupui.edu	Matt Radican	cbaich@iupui.edu	Please bill fo
Lending	Web Lending Cancel				Request Ca
Borrowing	NLM Request	custserv@nlm.nih.gov	National Library of Medicine		Interlibrary

× [NVTGC] = 'IUP' Or [NVTGC] = 'HERRON' Edit Filter

Edit Row

ProcessType	Borrowing
Name	Open Access
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Interlibrary Services Delivery Notice
DefaultFromAddress	ulill@iupui.edu
DefaultFromName	University Library Interlibrary Services
DefaultStatus	Delivered to Web
FileNameLoan	openaccess.txt
FileNameArticle	openaccess.txt
NVTGC	IUP

Lender and System ID



432795 - Request

Borrowing Processing

Cancel Request, Renew Request, Send Delivery Notification, Route, Route To Document Delivery, Gateway Search, Remove Payment, Order Status, Policies Directory, Billing, View, Send E-Mail, Empty Queue and Print, Add to Print Queue, Pending Updates, Import into Resubmission System

Detail | History | OCLC | Z39.50 | PubMed/Dodine

Article Info | Loan Info | Imported Request | User | Copyright | Invoice | Additional | Library

Journal Title: Acta Biologica Szegediensis
Volume/Issue: 52 | 1
Month/Year/Pages: | 2008 | 181-182
Article Author: | |
Article Title: Comparative study on sensitivity of different physiological properties of Spirodela polyrrhiza (L.) S
Original Journal Title: | |
Item Author/Publisher: | |
Item Place/Edition: | |

Other Information

Record Number: |
Bib Number: |
Lending String: |
Lender: open | 1 | ...
System ID: OTH | |
OCLC Status: |

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

Date	Note	Type	Added By

Share your Workflow tips!



Questions?



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