IDS Logic

Development Update

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A New Era of Workflow

How workflow may/may not improve with Apple Watch

// ILLiad Server Addon

- Rulekit
  - Our collection of custom rules for workflow
  - Based on trends of custom rules requested

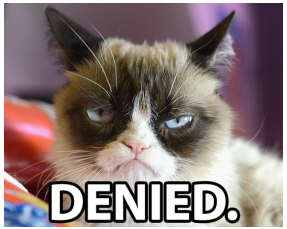
// ILLiad Server Addon

- Rulekit
  - Borrowing Loan Due On Shelf (10/2014)
    - Checks for items waiting to be picked up
    - Adds a flag indicating which items need to be sent back
    - Optional email notifies patron that item was returned

// ILLiad Server Addon

- Rulekit
  - Borrowing Loan Renewal OK (1/2014)
    - Adds new due date
    - Emails patron
    - Routes back to “Checked Out To Customer”

  - Borrowing Loan Renewal Denied (1/2014)
    - Adds new due date
    - Emails patron
    - Routes to specified queue



// ILLiad Server Addon

- Rulekit
  - Borrowing Loan Delay Received (6/2014)
    - Looks in “In Transit to Pickup Location”
    - Waits based on minutes in configuration
    - Routes to “Awaiting Customer Contact”

// ILLiad Server Addon

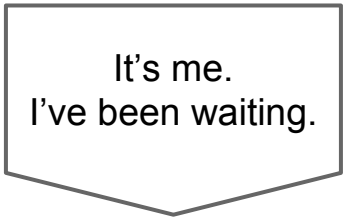
- Rulekit
  - Borrowing Stale Unfilled Flagger (8/2014)
    - Looks for TNs created 7 days ago
    - Adds flag
    - Routes to custom status
    - Emails patron

// ILLiad Server Addon

- Rulekit
  - Lending Expiring Soon (3/2015)
    - Looks in “Awaiting Stacks Searching”
    - Checks if created more than 3 days ago
    - Adds flag
    - Routes to custom status
    - Adds note
    - Adds custom text for pull slips

// ILLiad Server Addon

- Rulekit
  - Loan Pickup Reminder 1 & 2 (10/2014)
    - Looks in “Customer Notified by E-Mail”
    - Waits the number of days set in config
    - Sends patron a reminder email
    - Has 2 stages (New)
      - First reminder
      - Second reminder (for the final countdown)



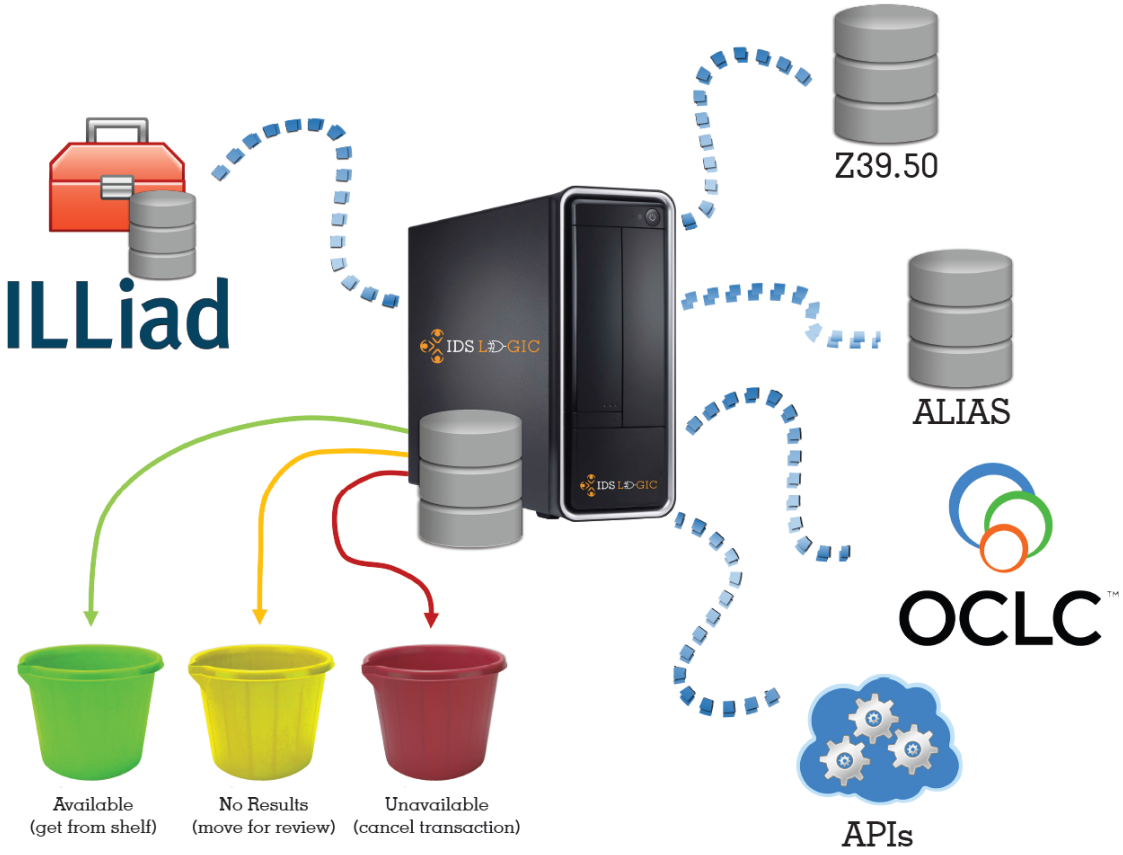
// ILLiad Server Addon

- Rulekit
  - Long Overdue Check Shelves (8/2014)
    - Checks for items long overdue
    - Adds custom flag
    - Routes to custom queue
    - Emails borrowing library

// ILLiad Server Addon

- Logic Services
  - More advanced and complex rules
    - Often several rules that work in tandem
  - Usually utilize external data sources
    - Utilize external API and services to pull in information for updating TNs and streamlining workflow

// ILLiad Server Addon



// ILLiad Server Addon

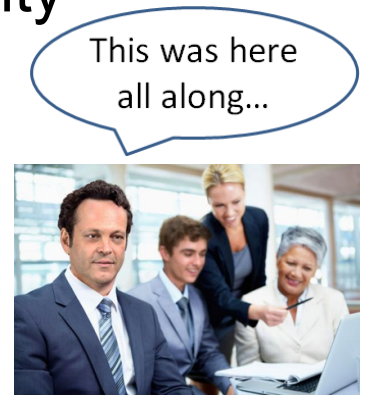
- Logic Services
  - Lending Loan Availability Service
    - Looks at loan requests in lending
    - Pulls in loan availability from local catalog
    - Routes to new status based on availability
    - Cancels OCLC request if unavailable

// ILLiad Server Addon

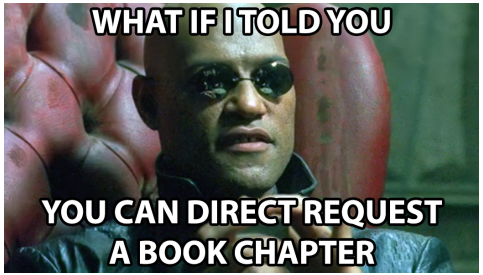
- Logic Services
  - Lending Book Chapter Availability Service
    - Looks at article requests in lending
    - Identifies article requests with ISBN
    - Pulls in loan availability from local catalog
    - Routes to new status based on availability
    - Cancels in OCLC if unavailable

// ILLiad Server Addon

- Logic Services
  - Borrowing Loan Availability Service
    - Looks at loan requests in borrowing
    - Pulls in loan availability from local catalog
    - Routes to new status based on availability
      - Has the option to route to Doc Del



// ILLiad Server Addon



- Logic Services
  - Book Chapter Direct Requester
    - Looks at article requests in borrowing
    - Identifies article requests with ISBN
    - Searches OCLC for potential lenders
      - Fills in the lending string
    - Routes to “Awaiting OCLC Sending”

// ILLiad Server Addon

- Logic Services
  - Direct Request Enhancer - In Beta!
    - Looks at loan requests in borrowing
    - Identifies requests that failed direct request
    - Searches OCLC for most relevant alt. edition
      - Starts with item with the most holdings
    - Routes to “Awaiting Direct Request Sending”
  - *Ask #theBillJones for details!*

// ILLiad Server Addon

- Logic Services
  - ALIAS V2.0
    - Looks at article requests in borrowing
    - Searches ALIAS holdings database for lenders
      - Fills in the lending string
      - Now has the ability for lenders to deflect requests (New)
        - Journal / Journal Collection / Journal Provider
      - Routes to “Awaiting OCLC Sending”
    - ALIAS DB is indexed weekly
      - We can now import MaRC files for prints

// ILLiad Server Addon

- Logic Services
  - Custom Logic Rules
    - Custom Ad-Hoc workflow rules
    - Highly configurable
      - Search Request Type
      - Search Process Type / Change Process Type
      - Search Status / Change Status
      - Search Flags / Add Flags
      - Custom Query (more than 250 characters)
      - Send Emails

What's Next?

// Main Form Addon

- IDS Central
  - Communication embedded into ILLiad Main Form
    - IDS Chatrooms and IDS Forums
    - Popular ILL Bookmarks
    - Conference registration
    - News / Twitter feeds
- IDS Batch Processing
  - Run IDS Logic Services on many requests at once
    - Streamlined article batch processing with 1 tab

// Main Form Addon

// Request Form Addon

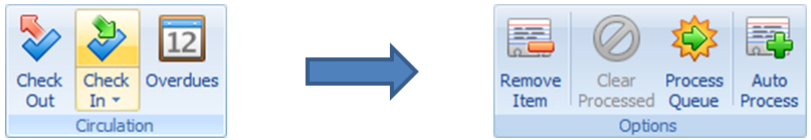
- THE IDS AddOn
  - Smarter Monolithic Transaction Addon
    - Only 1 Addon tab per request
    - Changes behavior based on process type
    - Changes behavior based on request type

// System Level Addon

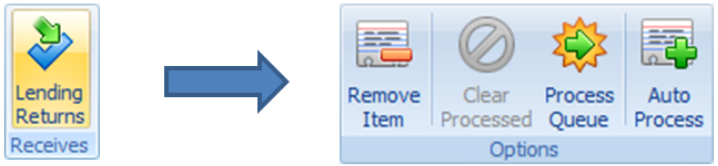
- IDS System AddOn
  - Deliver our NCIP Addon with a switch
- Logic Rules based on events
  - What events?

Borrowing Accept Item

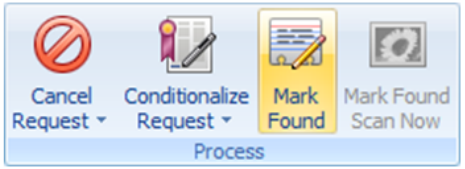
Borrowing Check In Item



Lending Check In Item



Lending Check Out Item



// ILLiad Web Page Addon

- IDS Custom CSS
  - CSS configured and delivered by IDS
- IDS Custom JavaScript
  - JavaScript configured and delivered by IDS
- Smarter web request forms
  - Auto-complete search within TN request form
  - Notify user if article/loan is available before submit
  - Install GIST with the flip of a switch

// Let Us Know

- Contact us
  - #theBillJones
  - logic@idsproject.org
- Join the next session
  - IDS Logic: Help Us Help You
    - Bill Jones & Michael C. Mulligan