

IDS Logic

Development Update

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A New Era of Workflow

How workflow may/may not improve with
Apple Watch

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



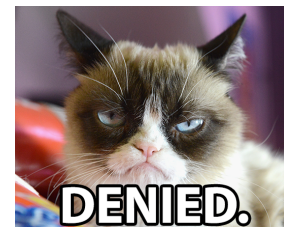
- Rulekit

- 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



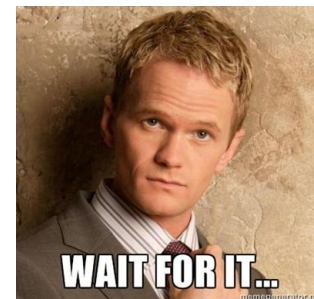
● Rulekit

- 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



- 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”



- Rulekit

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



- 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



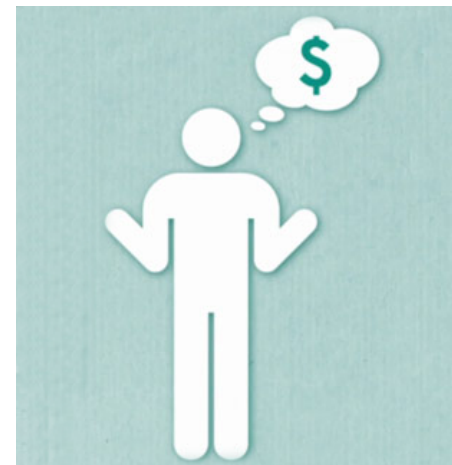
- Rulekit

- 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)

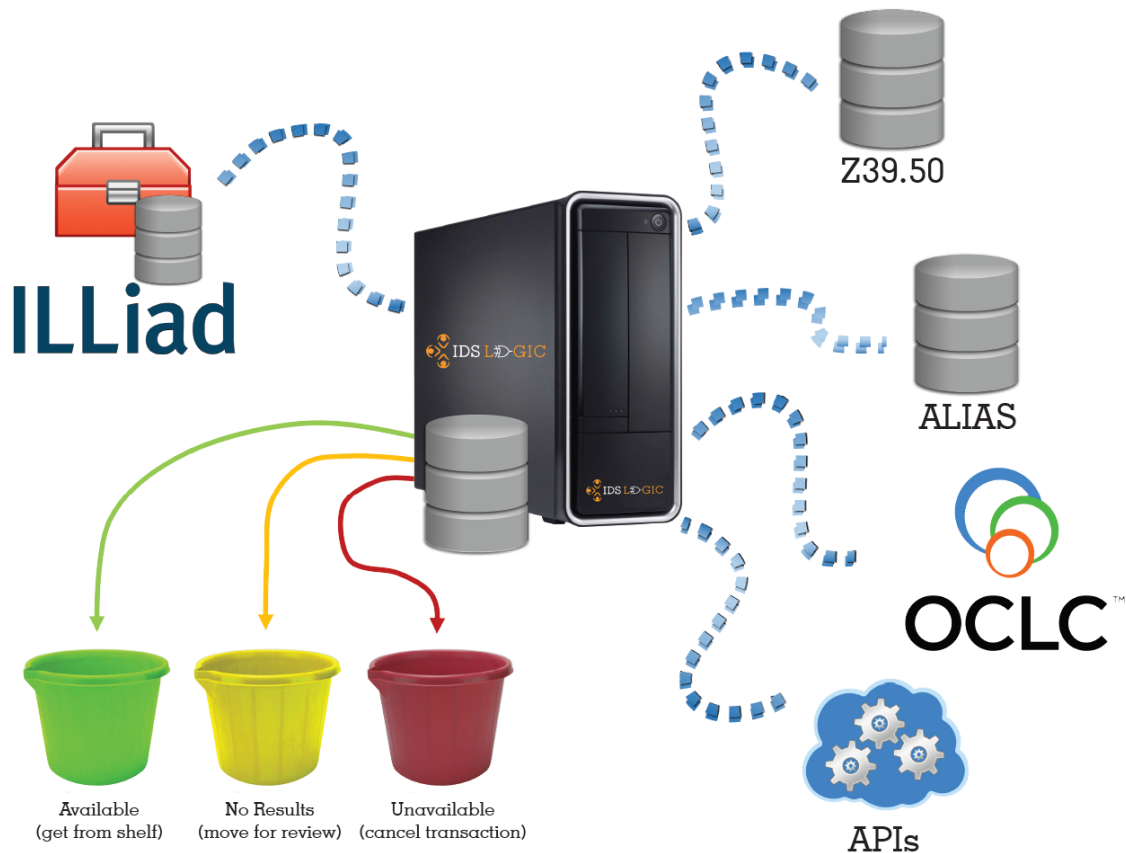
It's me.
I've been waiting.



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



- 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



- 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

- 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

- 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

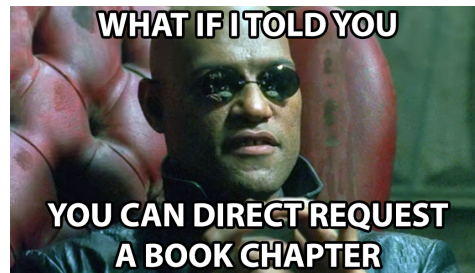
This was here
all along...



- 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”



- 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!*



- 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

- 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?

- **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



The screenshot shows a web browser window titled "IDS Central - ILLiad Client". The browser's address bar and navigation tools are visible at the top. The website content includes:

- Header:** "IDS PROJECT" logo and a tagline: "A unified community of trust and support built around a critical and clearly understood purpose: effective resource sharing." A collage of small images is positioned to the right of the tagline.
- Navigation:** A horizontal menu with links: Home, About, Join, Efficiency Tools, Conferences, Professional Development, Best Practices, Resources.
- Member Login:** A form on the left with fields for "Email Address:" and "Password:", a "Login" button, and a "Forgot Password?" link.
- News & Announcements:** A central section featuring a large graphic with the "IDS L-D-GIC Automation" logo.
- Highlighted Tools:** A section on the right with two tool cards:
 - IDS PROJECT PRESS**: A card with the IDS PROJECT logo and the text "community people trust support" and "trust support sharing unified".
 - IDS SEARCH**: A card with the IDS PROJECT logo and the text "IDS Search is a new searching tool for books and media. IDS Search helps users to find & get items fast. More..."
- Footer:** "IDS Project Sponsors" with logos for ATLAS, Copyright Clearance Center, and OCLC. It also includes "About Us | Join IDS Project | Contact Us", "Copyright 2015 Information Delivery Services Project All Rights Reserved", and a "Rethinking Resource Sharing" award badge (2008 and 2013 Innovation Award Winner).

- 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

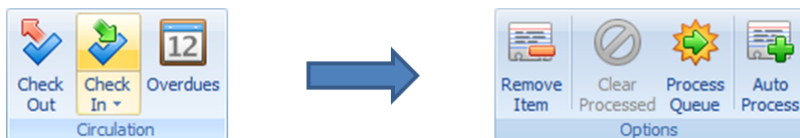


- IDS System AddOn
 - Deliver our NCIP Addon with a switch
- Logic Rules based on events
 - What events?

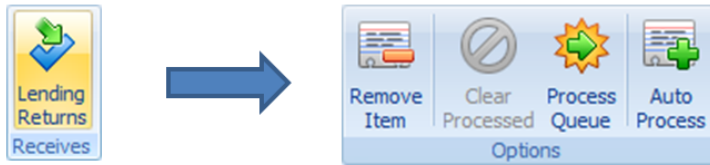
Borrowing Accept Item



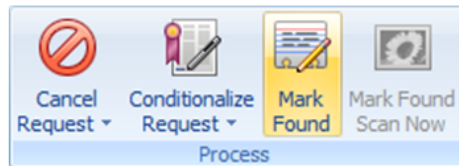
Borrowing Check In Item



Lending Check In Item



Lending Check Out Item



- **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

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