

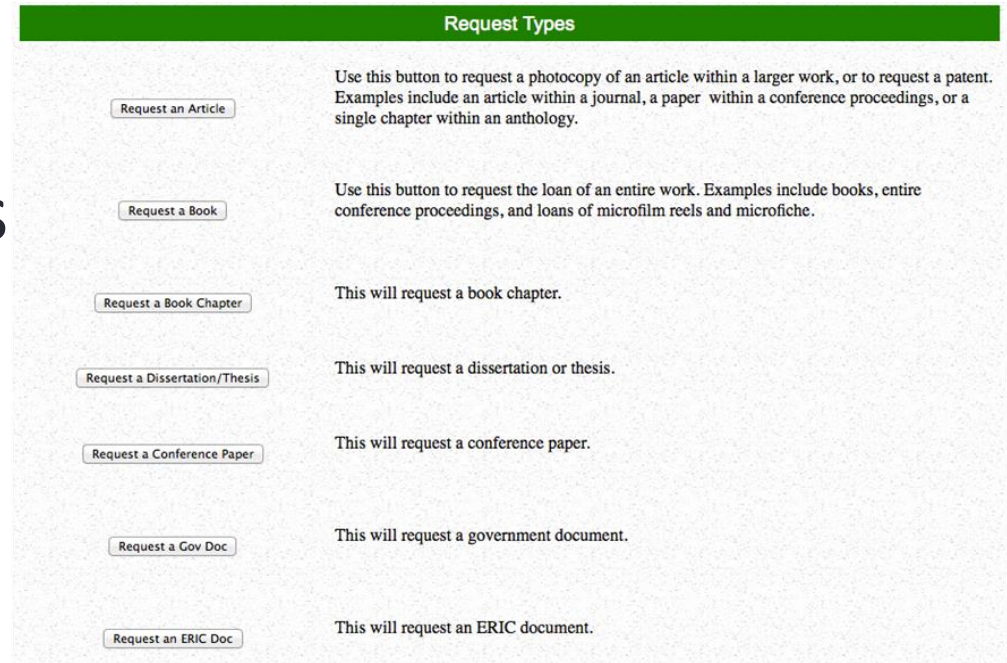
# **Adding and Modifying Document Request Forms**

Chris White, The Sage Colleges

Jay Kibby, The College of Saint Rose & The Sage Colleges

# Why am I doing this?

- ▶ Improve User Experience
- ▶ Requesting options did not match user needs
  - “How do I request a DVD?”
- ▶ Unattractive interface



Old Request Menu

# Types of Requests

- ▶ Loans:
  - Books
  - AV
  - Musical Scores
- ▶ Copies:
  - Articles
  - Book Chapters
- ▶ Dissertations/Theses  
(often requested and delivered as articles)

## **Main Menu**

---

### **New Request**

Article

Book

Book Chapter

ERIC Document

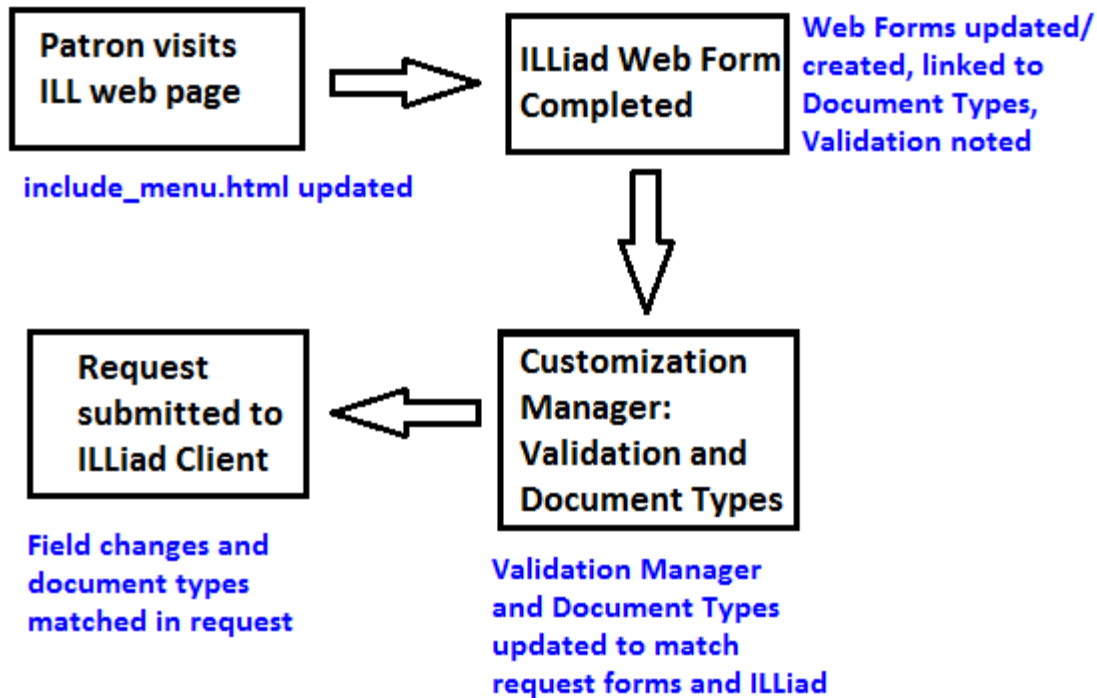
Audio Visual (CD,  
DVD, etc.)

Musical Score

Thesis/Dissertation

### **New Request Menu**

# What are we doing?



# New St. Rose ILL Homepage:

THE COLLEGE OF SAINT ROSE  
Neil Hellman Library  
WE EMPOWER CURIOUS MINDS.

[Library Home](#)

[Books](#)

[Research by Subject](#)

[Services](#)

[Archives](#)

[Curriculum Library](#)

[Get Help](#)

[Logoff ill](#)

[Main Menu](#)

[New Request](#)

[Article](#)

[Book](#)

[Book Chapter](#)

[ERIC Document](#)

[Audio Visual \(CD,  
DVD, etc.\)](#)

[Musical Score](#)

[Thesis/Dissertation](#)

[Existing Requests](#)

[Outstanding Requests](#)

[View/Download](#)

[Articles](#)

[View/Renew Checked](#)

[Out Items](#)

[Cancelled Requests](#)

[Finished Requests](#)

[All Requests](#)

[Notifications](#)

[Tools](#)

[Change User](#)

[Information](#)

[Change Accounts](#)

[Change Password](#)

[About ILLiad](#)

## Checked Out Items

Transaction Number	Document Type	Title	Author	Due Date	Status	Status Date
--------------------	---------------	-------	--------	----------	--------	-------------

No Items

## Electronically Received Articles

Transaction	View	Size	Title	Author	Expires	Delete
-------------	------	------	-------	--------	---------	--------

## Outstanding Requests

Transaction	Type	Title	Author	Status
-------------	------	-------	--------	--------

No Requests

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# Customization Manager

## ▶ Document Types

– Lending > General > Document Type Options

### DocumentTypeOptions

ILL  
**Settings**  
Key Value  
Article|Book|Book Chapter|ERIC|Thesis|AV|Musical Score|Other  
Description  
Default list of options for Received Via drop down on Add Request form.

# Customization Manager

## ► Web Form Values

- Web Interface > Labels > Web Form Values

**Note: Customization Manager can and should be updated first.**

WebFormValues			
NVTGC	Formname	SubmitButtonValue	SubmitButtonText
ILL	EditGenericRequestMusScore	Cancel - Return to Main Menu	Cancel - Return to Main Menu
ILL	EditGenericRequestMusScore	Exit to Main Menu	Exit to Main Menu
ILL	EditGenericRequestMusScore	Submit Request	Submit Request

Edit Row	
NVTGC	ILL
Formname	EditGenericRequestMusScore
SubmitButtonValue	Submit Request
SubmitButtonText	Submit Request



# Document Types in ILLiad Client

Service Level	Regular	Shipping Options	System
Billing Account		Doc Type	Musical Score

Article Info | Loan Info | Collections | Local Holdings | Imported Request | User | Copyrig

Title	Symphony in C /
Author	Bizet, Georges, 1838-1875.
Publisher	
Place	
Date	
Edition	
Original Loan Author	Bizet
Original Loan Title	Symphony in C

<input checked="" type="checkbox"/> Accept Alternate Edition
<input type="checkbox"/> Accept Non English
<input type="checkbox"/> Allow Copies?
<input type="checkbox"/> Copyright Already Paid?
<input type="checkbox"/> Allow Renewals?
<input type="checkbox"/> Library Use Only?
<input type="checkbox"/> Replacement Pages?
<input type="checkbox"/> Priority Shipping
<input type="checkbox"/> Ariel

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












# ILLiadForm Names

For Complete Works:

Duplicate **LoanRequest\EditLoanRequest**

As **GenericRequest[name]\EditGenericRequest[name]**













 viewDetailedBookInformation.html	7/24/2015 3:18 PM	HTML Document	2 KB
 <u>LoanRequest.html</u>	7/24/2015 6:56 PM	HTML Document	7 KB
 <u>EditLoanRequest.html</u>	7/24/2015 6:56 PM	HTML Document	7 KB
 includeMenu.html	7/24/2015 3:40 PM	HTML Document	2 KB
 ILLiad Main Menu.html	7/24/2015 3:30 PM	HTML Document	3 KB
 EditGenericRequestAV.html	7/24/2015 2:40 PM	HTML Document	7 KB
 GenericRequestAV.html	7/24/2015 2:14 PM	HTML Document	7 KB
 <u>EditGenericRequestMusScore.html</u>	7/24/2015 2:08 PM	HTML Document	7 KB
 <u>GenericRequestMusScore.html</u>	7/24/2015 1:53 PM	HTML Document	7 KB

# IlliadForm Names

For Parts of Works:

Duplicate **ArticleRequest\EditArticleRequest**

As **GenericRequest[name] \EditGenericRequest[name]**

 EditAccountInformation.html	7/24/2015 3:05 PM	HTML Document	3 KB
 AboutILLiad.html	7/24/2015 3:05 PM	HTML Document	2 KB
 ViewDetailedInformation.html	7/24/2015 3:13 PM	HTML Document	2 KB
 <u>ArticleRequest.html</u>	7/24/2015 6:57 PM	HTML Document	7 KB
 <u>EditArticleRequest.html</u>	7/24/2015 6:57 PM	HTML Document	7 KB
 DetailedInformation.html	7/24/2015 3:20 PM	HTML Document	2 KB
 EditBookChapterRequest.html	7/24/2015 3:22 PM	HTML Document	7 KB
 ILLiadMailMenu.html	7/24/2015 3:30 PM	HTML Document	3 KB
 include_menu.html	7/24/2015 3:40 PM	HTML Document	2 KB
 <u>EditGenericRequestScorePart.html</u>	7/24/2015 6:57 PM	HTML Document	7 KB
 <u>GenericRequestScorePart.html</u>	7/24/2015 6:57 PM	HTML Document	7 KB
 ChangeUserInformation.html	7/24/2015 3:03 PM	HTML Document	8 KB

# Tweak GenericRequest[name].html

## Add Three Lines

```
GenericRequestMusScore.html - Notepad
File Edit Format View Help
<html>
<head>
<title>Musical Score Request</title>
<link rel="stylesheet" type="text/css" href="css/main.css" media="screen" />
<link rel="stylesheet" type="text/css" href="css/print.css" media="print" />
<!--[if lte IE 6]>
<link rel="stylesheet" type="text/css" href="css/ie6_or_less.css" />
<![endif]-->
</head>
<body id="type-b">
<div id="wrap">
  <#INCLUDE filename="include_header_request.html">
  <div id="content-wrap">
    <#INCLUDE filename="include_menu.html">
    <div id="content">
      <form action="illiad.dll" method="post" name="GenericRequestMusScore" class="f-wrap-re
```

```
<input type="hidden" name="ILLiadForm" value="GenericRequestMusScore">
<input type="hidden" name="RequestType" value="Loan" > [or "Article"]
<input type="hidden" name="DocumentType" value="Musical Score">
<input type="hidden" name="username" value="<#PARAM name="username">">
<input type="hidden" name="sessionID" value="<#PARAM name="sessionID">">
```

**ADD AND EDIT  
THREE LINES**

# Copy and Paste:

- ▶ Copy and paste (and edit!) this code from the last slide:

```
<input type="hidden" name="ILLiadForm"
value="GenericRequestMusScore">
<input name="RequestType" type="hidden" id="RequestType"
value="Loan">
<input name="DocumentType" type="hidden" id="DocumentType"
value="Musical Score">
```

# Tweak GenericRequest[name].html

## Form Action Line

```
GenericRequestMusScore.html - Notepad
File Edit Format View Help
<html>
<head>
<title>Musical Score Request</title>
<link rel="stylesheet" type="text/css" href="css/main.css" media="screen" />
<link rel="stylesheet" type="text/css" href="css/print.css" media="print" />
<!--[if lte IE 6]>
<link rel="stylesheet" type="text/css" href="css/ie6_or_less.css" />
<![endif]-->
</head>
<body id="type-b">
<div id="wrap">
  <#INCLUDE filename="include_header_request.html">
  <div id="content-wrap">
    <#INCLUDE filename="include_menu.html">
    <div id="content">
      <form action="illiad.dll" method="post" name="GenericRequestMusscore" class="f-wrap-rec
<input type="hidden" name="ILLiadForm" value="GenericRequestMusscore">
<input type="hidden" name="RequestType" value="Loan">
<input type="hidden" name="DocumentType" value="Musical Score">
<input type="hidden" name="Username" value="<#PARAM name="Username">">
<input type="hidden" name="SessionID" value="<#PARAM name="SessionID">">
```

**TWEAK ONE LINE**  
**(Advisable But Probably Superfluous)**



# Tweak GenericRequest[name].html

## How It All Fits Together

```
<html>
<head>
<title>Musical Score Request</title>
<link rel="stylesheet" type="text/css" href="css/main.css" media="screen" />
<link rel="stylesheet" type="text/css" href="css/print.css" media="print" />
<!--[if lte IE 6]>
<link rel="stylesheet" type="text/css" href="css/ie6_or_less.css" />
<![endif]-->
</head>
<body id="type-b">
<div id="wrap">
  <#INCLUDE filename="include_header_request.html">
  <div id="content-wrap">
    <#INCLUDE filename="include_menu.html">
    <div id="content">
      <form action="illiad.dll" method="post" name="GenericRequestMusScore" class="f-wrap-request
<input type="hidden" name="ILLiadForm" value="GenericRequestMusScore">
<input type="hidden" name="RequestType" value="Loan">
<input type="hidden" name="DocumentType" value="Musical Score">
<input type="hidden" name="Username" value="#PARAM name="Username">
<input type="hidden" name="SessionID" value="#PARAM name="SessionID">
</div>
<div id="DocumentTypeOption">
  <h3>DocumentTypeOption</h3>
  <table border="1">
    <tr>
      <th>Settings</th>
    </tr>
    <tr>
      <td>Key Value</td>
    </tr>
    <tr>
      <td>Article|Book|Book Chapter|ERIC|Thesis|AV|Musical Score|Other</td>
    </tr>
    <tr>
      <td>Description</td>
    </tr>
    <tr>
      <td>Default list of options for Received Via drop down on Add Request form.</td>
    </tr>
  </table>
</div>
</div>
</div>
</body>
</html>
```

Indicates required field</div>  
Request</h3>



# Tweak EditGenericRequest[name].html

```
<html>
<head>
<title>Musical Score Request</title>
<link rel="stylesheet" type="text/css" href="css/main.css" media="screen" />
<link rel="stylesheet" type="text/css" href="css/print.css" media="print" />
<!--[if lte IE 6]>
<link rel="stylesheet" type="text/css" href="css/ie6_or_less.css" />
<![endif]-->
</head>
<body id="type-b">
<div id="wrap">
  <#INCLUDE filename="include_header_request.html">
  <div id="content-wrap">
    <#INCLUDE filename="include_menu.html">
    <div id="content">
      <form action="illiad.dll" method="post" name="GenericRequestMusscore" class="f-wrap-request
<input type="hidden" name="ILLiadForm" value="GenericRequestMusscore">
<input type="hidden" name="RequestType" value="Loan">
<input type="hidden" name="DocumentType" value="Musical Score">
<input type="hidden" name="Username" value="#PARAM name="Username">
<input type="hidden" name="SessionID" value="#PARAM name="SessionID">
</div>
</div>
</div>
</body>
</html>
```

**DocumentTypeOption**

Settings

Key Value	Article Book Book Chapter ERJC Thesis AV Musical Score Other
Description	Default list of options for Received Via drop down on Add Request form.

Indicates required field</div>  
Request</h3>



# Editing Title and Label Fields

```
GenericRequestMusScore.html - Notepad
File Edit Format View Help
<html>
<head>
<title>Musical Score Request</title>
<link rel="stylesheet" type="text/css" href="css/main.css" media="screen" />
<link rel="stylesheet" type="text/css" href="css/print.css" media="print" />
<!--[if lte IE 6]>
<link rel="stylesheet" type="text/css" href="css/ie6_or_less.css" />
<![endif]-->
</head>
<body id="type-b">
<div id="wrap">
  <#INCLUDE filename="include_header_request.html">
  <div id="content-wrap">
    <#INCLUDE filename="include_menu.html">
    <div id="content">
      <form action="illiad.dll" method="post" name="GenericRequestMusScore" class="f-wrap-request">
        <input type="hidden" name="ILLiadForm" value="GenericRequestMusScore">
        <input type="hidden" name="Username" value="#PARAM name="Username">
        <input type="hidden" name="SessionID" value="#PARAM name="SessionID">
        <input name="RequestType" type="hidden" id="RequestType" value="Loan">
        <input name="DocumentType" type="hidden" id="DocumentType" value="Musical Score">
        <div class="req"><b>*</b> Indicates required field</div>
        <fieldset>
          <h3>Musical Score Request</h3>
          <#STATUS>
          <h2>Describe the item you want</h2>
          <label for="LoanAuthor">
            <#ERROR name="ERRORLoanAuthor">
            <b>Composer</b>
            <input id="LoanAuthor" name="LoanAuthor" type="text" size="40" class="f-name" tabindex="1"
            value="#PARAM name="LoanAuthor"><br />
          </label>
          <label for="LoanTitle">
            <#ERROR name="ERRORLoanTitle">
            <b><span class="req">*</span>Title<br />
            <span class="note">Please do not abbreviate unless your citation is abbreviated</span></b>
            <textarea id="LoanTitle" name="LoanTitle" rows="2" cols="40" class="f-name" tabindex="2"><#PARAM
            name="LoanTitle"></textarea><br />
          </label>
          <label for="LoanPublisher">
            <#ERROR name="ERRORLoanPublisher">
            <b>Publisher</b>

```

# Editing Title and Label Fields

```
GenericRequestMusScorePart.html - Notepad
File Edit Format View Help
<html>
<head>
<title>Portion of Musical score</title>
<link rel="stylesheet" type="text/css" href="css/main.css" media="screen" />
<link rel="stylesheet" type="text/css" href="css/print.css" media="print" />
<!--[if lte IE 6]>
<link rel="stylesheet" type="text/css" href="css/ie6_or_less.css" />
<![endif]-->
</head>
<body id="type-b">
<div id="wrap">
  <#INCLUDE filename="include_header_request.html">
  <div id="content-wrap">
    <#INCLUDE filename="include_menu.html">
    <div id="content">
      <form action="illiad.dll" method="post" name="GenericRequestMusScorePart" class="f-wrap-request">
        <input type="hidden" name="ILLiadForm" value="GenericRequestMusScorePart">
        <input type="hidden" name="Username" value="#PARAM name="Username">
        <input type="hidden" name="SessionID" value="#PARAM name="SessionID">
        <div class="req"><b>*</b> Indicates required field</div>
        <fieldset>
          <h3>Portion of Musical score</h3>
          <#STATUS>
          <h2>Describe the item you want</h2>
          <label for="PhotoJournalTitle">
            <label for="PhotoArticleTitle">
              <span class="field">
                <span class="req">*</span>
                <span class="#ERROR name="ERRORPhotoArticleTitle"><b>Title of Part/Song/Movement</b></span>
                <span class="note">Enter as much information as you know. Include movement number or title of
                  instrumental part if needed.</span>
              </span>
            </label>
          </label>
          <label for="PhotoItemAuthor">
            <span class="field">
              <span class="#ERROR name="ERRORPhotoItemAuthor"><b>Composer</b></span>
              <input id="PhotoItemAuthor" name="PhotoItemAuthor" type="text" size="40"
            </span>
          </label>
          <label for="PhotoArticleAuthor">
            <span class="field">
              <span class="#ERROR name="ERRORPhotoArticleAuthor"><b>Title of work or
                </span>
              <input id="PhotoArticleAuthor" name="PhotoArticleAuthor" type="text" size="40"
            </span>
          </label>
        </div>
      </form>
    </div>
  </div>
</body>
</html>
```



# Editing Request Menu

Add Generic Requests to Menu:

```
1 <div id="utility">
2   <ul id="nav">
3     <li class="active"><a href="#ACTION action="99">Logoff <PARAM name="Username">/a>/li>
4     <li class="active"><a href="#ACTION action="10" form="10">Main Menu</a>/li>
5     <li class="active"><a href="#">New Request</a>
6   </ul>
7   <ul>
8     <li class="first"><a href="#ACTION action="10" form="22">Article</a>/li>
9     <li><a href="#ACTION action="10" form="21">Book</a>/li>
10    <li><a href="#ACTION action="10" form="23">Book Chapter</a>/li>
11    <li><a href="#ACTION action="10" form="26">ERIC Document</a>/li>
12    <li><a href="#ACTION action="10" form="20" value="GenericRequestAV">Audio Visual (CD, DVD, etc.)</a>/li>
13    <li><a href="#ACTION action="10" form="20" value="GenericRequestMusScore">Musical Score</a>/li>
14    <li><a href="#ACTION action="10" form="27">Thesis/Dissertation</a>/li>
```

- ▶ Form number 20 for Generic Requests
- ▶ Attribute required for Generic Requests, refers to file name.

# Copy and Paste:

- ▶ Copy and paste (and edit!) this code from the last slide:

```
<li><a href="#ACTION action="10" form="20" value="GenericRequestAV">">Audio Visual (CD, DVD, etc.)</a></li>
```

```
<li><a href="#ACTION action="10" form="20" value="GenericRequestMusScore">">Musical Score</a></li>
```

# WebValidation

## WebValidation


NVTGC	Formname	Fieldname	Validation	Err
ILL	GenericRequestAV	LoanTitle	.+	***
ILL	GenericRequestAV	NotWantedAfter	[^\d\d\.\d\d\.\d\d\d\d\$]	***
ILL	GenericRequestMusscore	LoanAuthor	.+	***
ILL	GenericRequestMusscore	LoanTitle	.+	***
ILL	GenericRequestMusscore	NotWantedAfter	.+	***
ILL	LendingGenericRequestArticle	PhotoArticleTitle	.+	***
ILL	LendingGenericRequestArticle	PhotoJournalInclusivePages	.+	***
ILL	LendingGenericRequestArticle	PhotoJournalTitle	.+	***
ILL	LendingGenericRequestLoan	LoanAuthor	.+	***
ILL	LendingGenericRequestLoan	LoanTitle	.+	***
ILL	LendingGenericRequestLoan	NotWantedAfter	.+	***
ILL	LoanRequest	LoanAuthor	.+	***
ILL	LoanRequest	LoanTitle	.+	***
ILL	LoanRequest	NotWantedAfter	.+	***
ILL	NewAuthRegistration	Address	*	***

**Duplicate Loan Request Rows As Needed**

# WebValidation

## Edit Row

NVTGC	ILL
Formname	GenericRequestMuscore
Fieldname	LoanAuthor
Validation	.+
Error	***Loan Author is a required field***
ErrorTag	ERRORLoanAuthor

 **Only Edit The Formname**



# WebValidation

Remember to Duplicate EditGenericRequest Rows

ILL	EditBookChapterRequest	NotWantedAfter	[^\d\d,\d\d,\d\d\d\d\$]	***
ILL	EditBookChapterRequest	PhotoJournalTitle	.+	***
ILL	EditConferencePaperRequest	NotWantedAfter	[^\d\d,\d\d,\d\d\d\d\$]	***
ILL	EditConferencePaperRequest	PhotoJournalTitle	.+	***
ILL	EditGenericRequestAV	LoanTitle	.+	***
ILL	EditGenericRequestAV	NotWantedAfter	[^\d\d,\d\d,\d\d\d\d\$]	***
ILL	EditGenericRequestMusscore	LoanAuthor	.+	***
ILL	EditGenericRequestMusscore	LoanTitle	.+	***
ILL	EditGenericRequestMusscore	NotWantedAfter	[^\d\d,\d\d,\d\d\d\d\$]	***
ILL	EditLoanRequest	LoanAuthor	.+	***
ILL	EditLoanRequest	LoanTitle	.+	***
ILL	EditLoanRequest	NotWantedAfter	[^\d\d,\d\d,\d\d\d\d\$]	***
ILL	EditOtherRequest	NotWantedAfter	[^\d\d,\d\d,\d\d\d\d\$]	***
ILL	EditOtherRequest	Other	.+	***
ILL	EditPatentRequest	NotWantedAfter	[^\d\d,\d\d,\d\d\d\d\$]	***
ILL	EditPatentRequest	PhotoJournalTitle	.+	***
ILL	EditReportRequest	LoanAuthor	.+	***

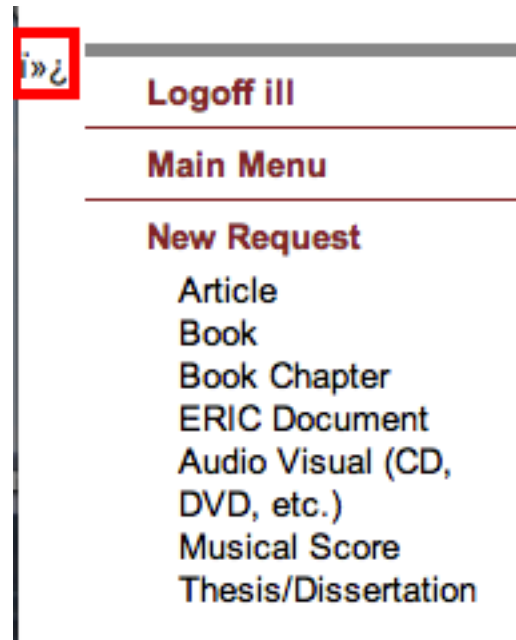
**Duplicate Loan Request Rows As Needed**



# Potential Problems

Using any encoding that is not UTF-8 in text editor generates this problem

**Note: We found it was best to use Notepad 2 for this process.**




# Potential Problems

Delivered GenericRequestTest.html generates this problem

Describe the item you want	
Artist (if known)	<input type="text"/> valid
*Title <small>Please do not abbreviate unless your citation is abbreviated</small>	<input type="text"/> valid
Publisher	<input type="text"/> valid
Place of Publication	<input type="text"/> valid
Date of Publication	<input type="text"/> valid
Edition	<input type="text"/> valid
ISBN (International Standard Book Number) <small>If given will speed request processing</small>	<input type="text"/> valid
OCLC or Docline UI Number	<input type="text"/> valid

**Results From Faulty Syntax With Error Codes**



# Potential Problems

Avoid Using Delivered GenericRequestTest.html Code

```
        <label for="LoanTitle">
          <#ERROR name="ERRORLoanTitle">
          <b><span class="req">*</span>Title<br />
          <span class="note">Please do not abbreviate unless your cita
          <textarea id="LoanTitle" name="LoanTitle" rows="2" cols="40"
          </label>
          </input name="LoanTitle"></textarea><br />
        </label>
```

**BAD SYNTAX**

```
        </span>
        <input id="LoanAuthor" name="LoanAuthor" type="text" size="40" class="f-name
        </input name="LoanAuthor"></br />
        <label for="LoanTitle">
        <span class="field">
        <span class="req">*</span>
        <span class="note"><#ERROR name="ERRORLoanTitle"><b>Title</b></span><br />
        <span class="note">Please do not abbreviate unless your citation is abbrev
        </span>
        <textarea id="LoanTitle" name="LoanTitle" rows="2" cols="40" class="f-name
        </label>
```

**GOOD SYNTAX**

# Best (Actually Only) Practices

## ▶ For Complete Works, duplicate

LoanRequest.html and EditLoanRequest.html

**AS**

GenericRequest[name].html AND EditGenericRequest[name].html

## ▶ For Parts of Works, duplicate

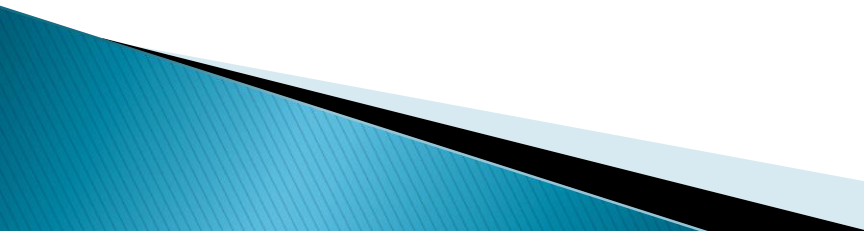
ArticleRequest.html and EditArticleRequest.html

**AS**

GenericRequest[name].html AND EditGenericRequest[name].html

Be Sure Not To Confuse document type with document name.

# Our Questions

- ▶ Automatic population of forms
    - Open URL may not populate document type
    - OCLC record includes document type
      - Map to Generic Request file
  
  - ▶ How do patrons request?
    - Opportunity for future study
    - OpenURL or manual ILLiad request
- 

**Your Questions?**





**fin.**

Please feel free to contact one of us if you have any questions:

**Chris White**

whitec2@sage.edu

**Jay Kibby**

kibbyj@strose.edu