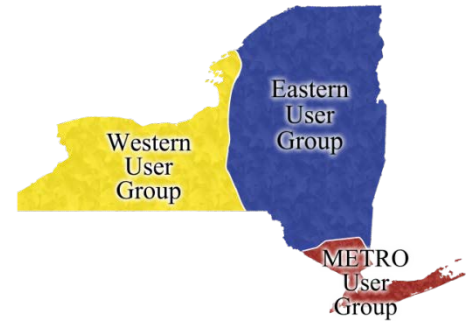




IDS PROJECT



Customization Manager 101

Welcome!

Customization Manager 101 is right for you if:

- You don't know what the Customization Manager is
- You have never used Customization Manager
- You have never made changes in Customization Manager

Agenda

- What is the Customization Manager
- Permissions
- Basic Settings/Best Practices
- Navigating the Customization Manager
- Reasons for Cancellations
- Timelines & Due Dates
- Custom Queues
- Emails

What is the Customization Manager?

- The Customization Manager is a toolbox full of ways to make ILLiad perform the way *you* want it to.
- Access the Customization Manager is gained via the shortcut that should be installed on your desktop. If you don't have a shortcut, CM can be found in your C:\Program Files\ILLiad\Admin folder.
- Changes you make in the Customization Manager are *global* – remember that whatever changes you make will affect everyone at your site.
- With great power comes great responsibility – permission to make changes in the Customization Manager should be given only to supervisors or other trusted users.



Why Should I Make Changes to the Customization Manager?

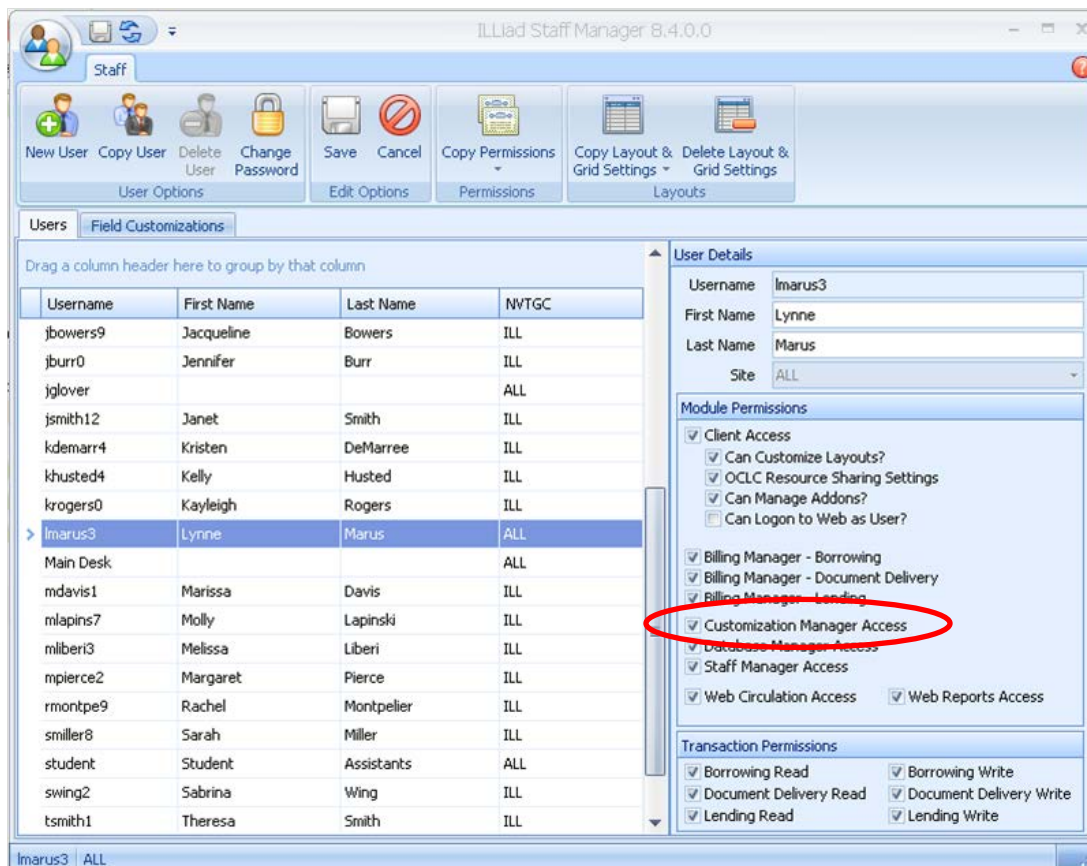
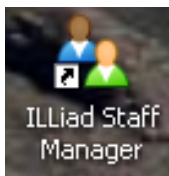
- The Customization Manager puts *you* in the driver's seat.
- Keys can be set to optimize your workflow, saving you time and ensuring that items are delivered quickly and seamlessly.
- Creating Custom Queues and Routing Rules streamlines processing – allowing you to highlight requests requiring special processing and eliminating the need to manually change statuses and sending emails outside of the ILLiad client.



Where Do I Get Permission to Access the Customization Manager?

■ In order to make changes in the Customization Manager, you must have permission.

■ Permissions are granted in the ILLiad Staff Manager.



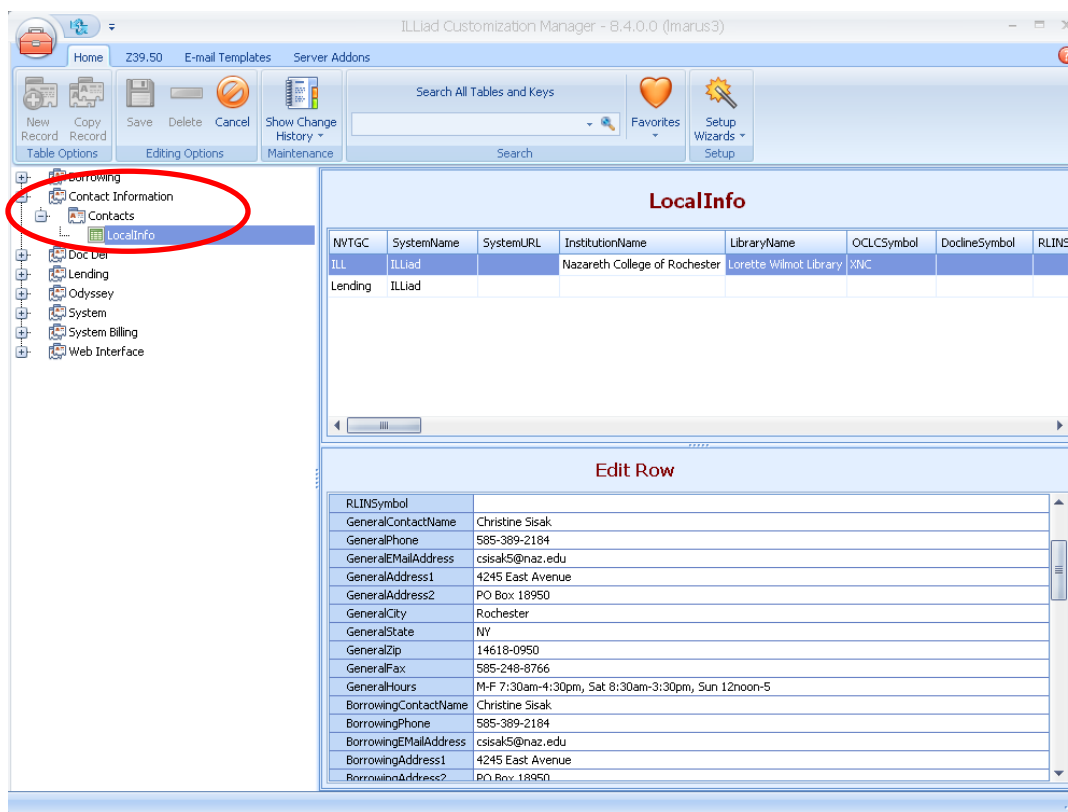
Contact Information – Who are You?

■ Contact Information Tables let people know who and where you are, and how to get in touch with you. Information in these tables is used to populate your emails and printed forms.

■ Two Contact Information tables:

ILL – Borrowing lets your lenders know who to contact, hours, and mailing address.

Lending – who does a borrowing library contact for information?

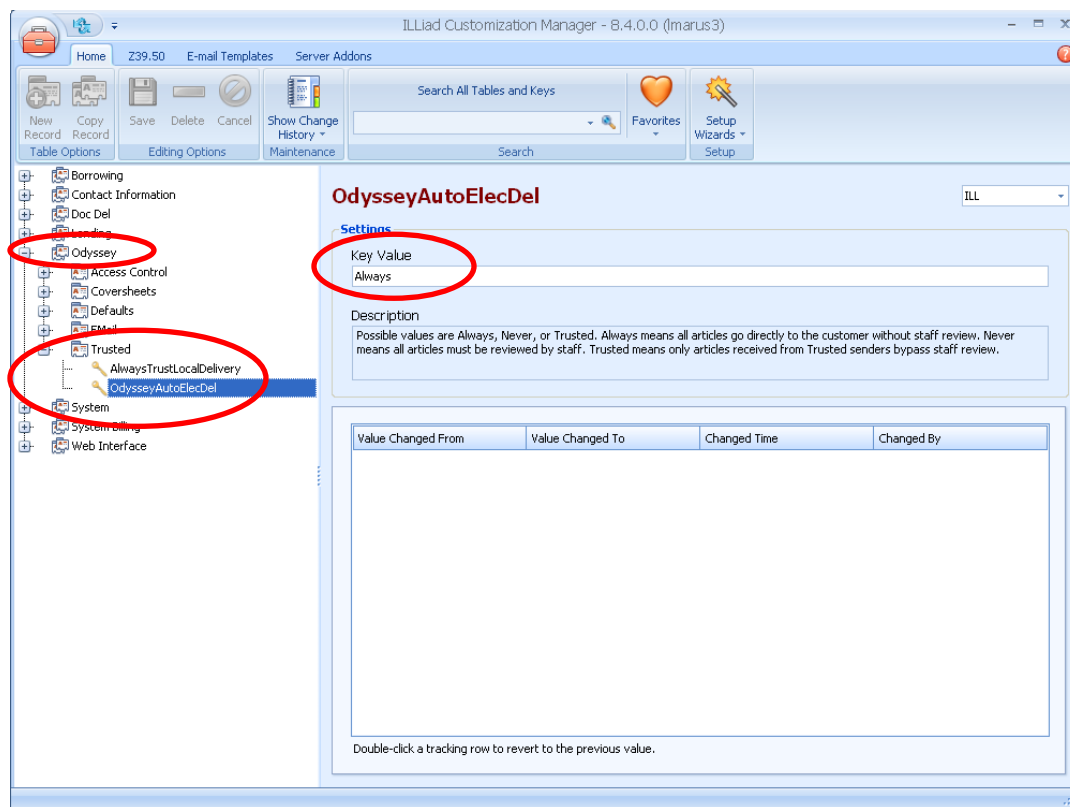


| NVTGC | SystemName | SystemURL | InstitutionName | LibraryName | OCLCSymbol | DoclineSymbol | RLIN |
|---------|------------|-----------|-------------------------------|------------------------|------------|---------------|------|
| ILL | ILLiad | | Nazareth College of Rochester | Lorette Wilnot Library | XNC | | |
| Lending | ILLiad | | | | | | |

| RLINSymbol | GeneralContactName | GeneralPhone | GeneralEmailAddress | GeneralAddress1 | GeneralAddress2 | GeneralCity | GeneralState | GeneralZip | GeneralFax | GeneralHours | BorrowingContactName | BorrowingPhone | BorrowingEmailAddress | BorrowingAddress1 | BorrowingAddress2 |
|------------|--------------------|--------------|---------------------|------------------|-----------------|-------------|--------------|------------|--------------|--|----------------------|----------------|-----------------------|-------------------|-------------------|
| | Christine Sisak | 585-389-2184 | csisak5@naz.edu | 4245 East Avenue | PO Box 18950 | Rochester | NY | 14618-0950 | 585-248-8766 | M-F 7:30am-4:30pm, Sat 8:30am-3:30pm, Sun 12noon-5 | Christine Sisak | 585-389-2184 | csisak5@naz.edu | 4245 East Avenue | PO Box 18950 |

Odyssey Trusted Sender

- Automates delivery of electronic document copies
- Eliminates the need to visually inspect each incoming document
- Documents are delivered directly to the Web
- Patrons are automatically notified
- Three settings:
 - Always
 - Never
 - Trusted



Borrowing Direct Request

▪ Enabling Direct Request in ILLiad allows you to automate routine processing.

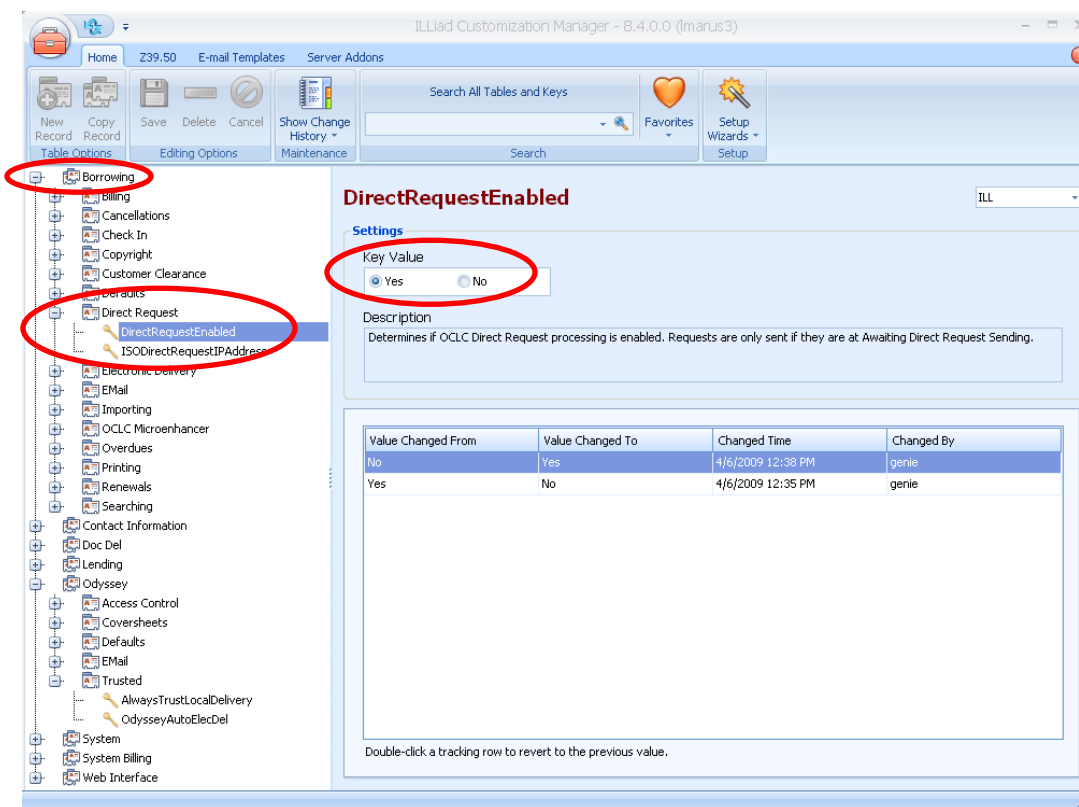
▪ Direct Request currently is used mainly for loans

▪ Two steps you must follow in order for Direct Request to work:

1. Create your Direct Request Profile
2. Activate the Direct Request Routing Rule and Key

Detailed instructions are found in your IDS Project Workflow Toolkit binder or on the Workflow Toolkit page at the IDS Project Website:

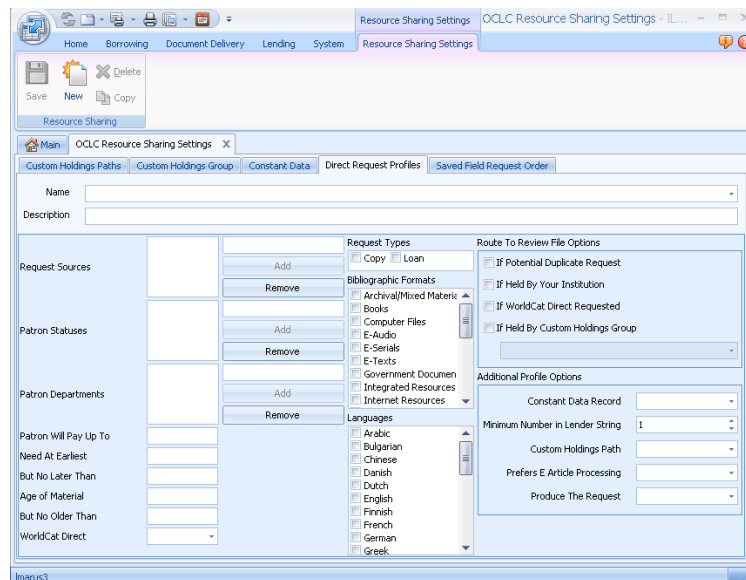
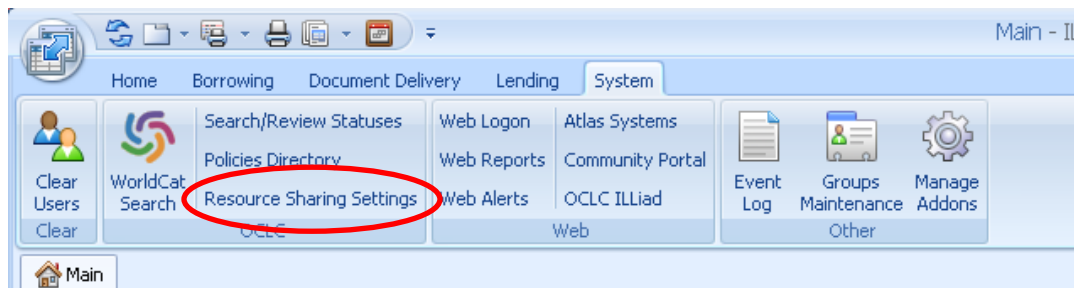
<http://www.idsproject.org/>



Direct Request Profile

Access to your Direct Request Profile is through the client, under “System” and Resource Sharing Settings.

This opens up a form that guides you through setting up your Direct Request Profile.



Direct Request Routing

ILLiad Customization Manager - 8.4.0.0 (Imarus3)

Home Z39.50 E-mail Templates Server Addons

New Record Copy Record Save Delete Cancel Show Change History Maintenance Search All Tables and Keys Favorites Setup Wizards Setup

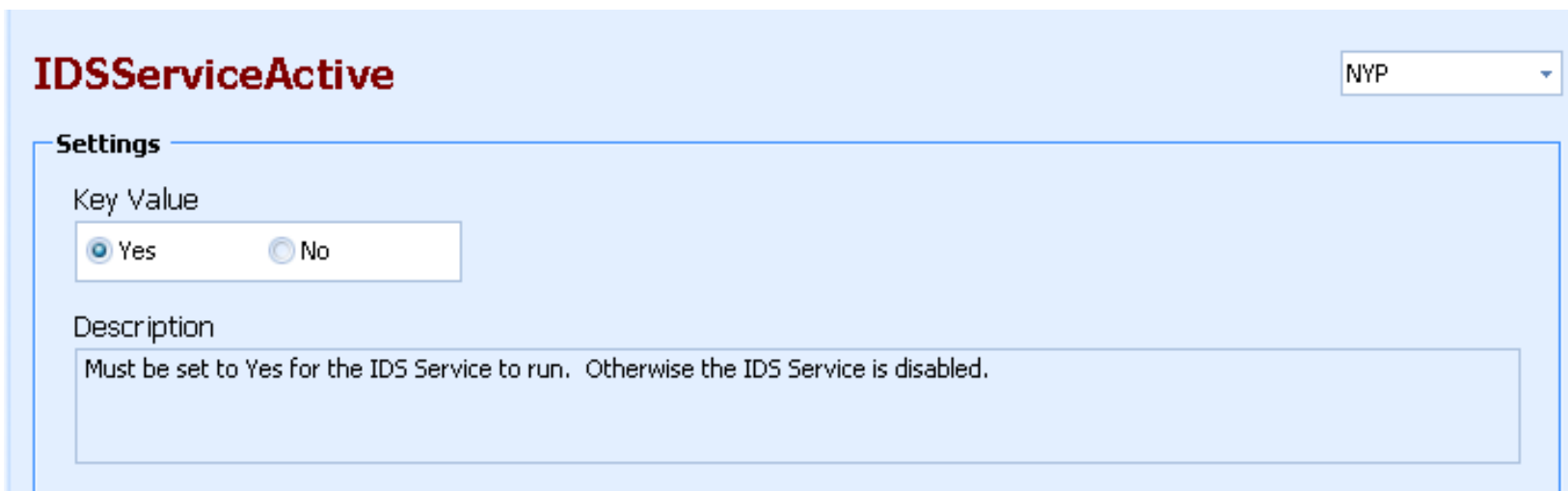
Routing

| Rul... | RuleActive | ProcessType | TransactionStatus | Matchstring | NewProcessType | NewTransactionStatus | RuleDescription |
|--------|------------|-------------|---------------------------------------|------------------|----------------|---|--|
| 1 | Yes | Borrowing | Awaiting Request Processing | t.RequestT... | Borrowing | Awaiting OCLC Sending | Routing rule for IDS Circulation Availi |
| 2 | Yes | Borrowing | Awaiting Request Processing | t.ISSN >" a... | Borrowing | Awaiting Direct Request Sending | Default Direct Request rule |
| 3 | Yes | Lending | Awaiting Lending Request Processing | t.lendinglibr... | Lending | Awaiting IDS Agreement Processing | For all IDS requests |
| 4 | Yes | Lending | Awaiting Lending Request Processing | t.lendinglibr... | Lending | Awaiting CHARGE Processing | Charge libraries routing rule |
| 5 | Yes | Lending | Awaiting Shipping Label Printing | t.RequestT... | Lending | Request Finished | No Shipping Labels Printed for Articles. I |
| 12 | Yes | Lending | Awaiting Lending Request Processing | t.lendinglibr... | Lending | Awaiting ALL RECIP Agreement Processing | IDS Lending Rule |
| 15 | Yes | Borrowing | In Doc Del Stacks Searching | t.RequestT... | Doc Del | In DD Stacks Searching | Direct routing of e-journal article requ |
| 16 | Yes | Borrowing | To Purchasing | t.RequestT... | Doc Del | Awaiting Acquisitions Purchase Decision | Direct routing of e-journal article requ |
| 20 | Yes | Borrowing | Awaiting Copyright Clearance | t.RequestT... | Borrowing | Awaiting IDS Sending | Rule to bypass copyright clearance |
| 25 | Yes | Borrowing | Awaiting Request Processing | t.ISSN >" a... | Borrowing | Awaiting IDS Sending | Default: IDS Request |
| 30 | Yes | Borrowing | Awaiting IDS Local Processing | t.ISSN >" a... | Borrowing | Awaiting Request Processing | Rule to route the failed IDS Sendings in |
| 35 | Yes | Borrowing | Cancelled by Customer | t.ILLNumber... | Borrowing | Cancelled by ILL Staff | Automatically update all requests Cance |
| 40 | Yes | Doc Del | Awaiting Document Delivery Processing | t.RequestT... | Doc Del | Awaiting DD Stacks Searching | Direct routing of journal and book requ |
| 45 | Yes | Doc Del | Awaiting Document Delivery Processing | t.RequestT... | Doc Del | Awaiting DD Stacks Searching | Direct routing of journal and book requ |
| 50 | Yes | Lending | Awaiting Shipping Label Printing | t.RequestT... | Lending | Item Shipped | No Shipping Labels Printed for Loans. M |
| 55 | Yes | Lending | Awaiting Shipping Label Printing | t.CallNumbe... | Lending | Request Finished | Skips Shipping Label Printing for Articles |
| 60 | Yes | Borrowing | Awaiting Return Label Printing | t.RequestT... | Borrowing | Request Finished | Bypass return label printing for loans in |

RoutingOn

Keys

- There are two different types of keys in CM
 1. Yes or No switch
 - Allows the user to activate or deactivate specific elements for the ILLiad Client, Billing, and/or Web Interface



IDSServiceActive NYP

Settings

Key Value

☒ Yes ☐ No

Description

Must be set to Yes for the IDS Service to run. Otherwise the IDS Service is disabled.

Keys

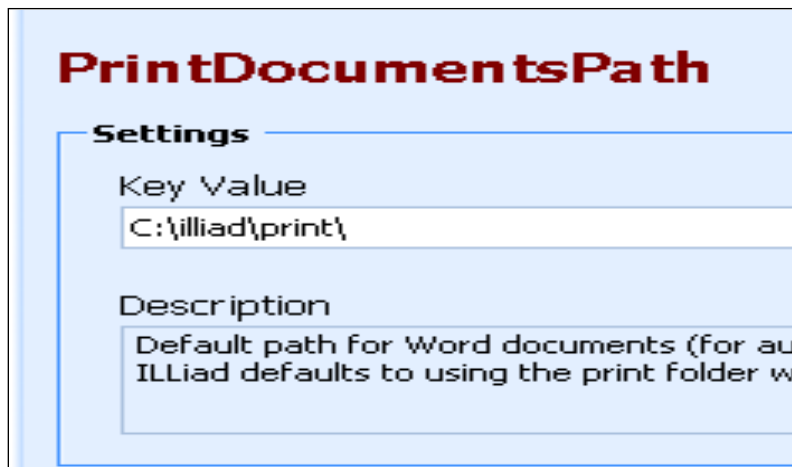


2. Data transferring

- CM acts as the middle man between ILLiad and the user's computer

Keys – Data Transferring

- ILLiad → Computer
 - Example: Print Documents Path
 - Assign a folder location for ILLiad to know where to send the information

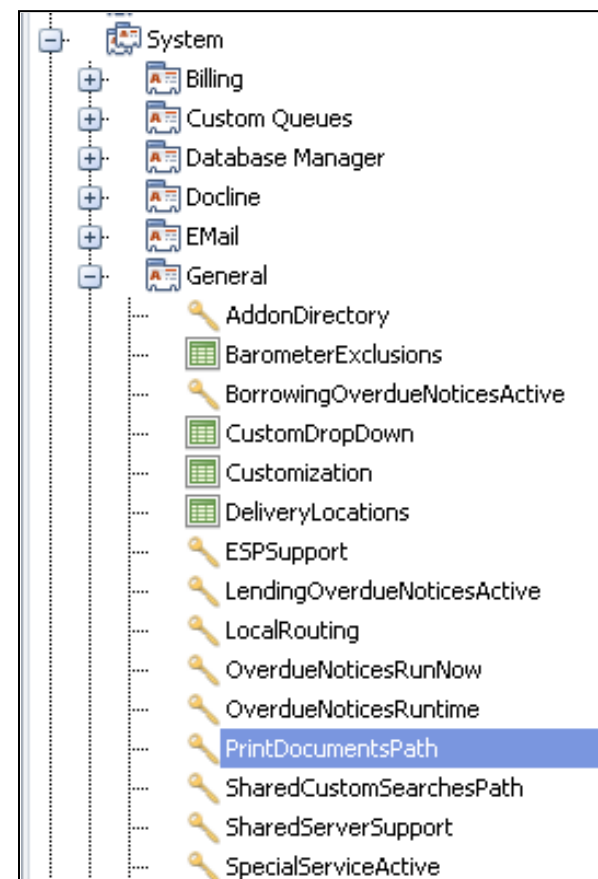


PrintDocumentsPath

Settings

Key Value
C:\illiad\print\

Description
Default path for Word documents (for au
ILLiad defaults to using the print folder w



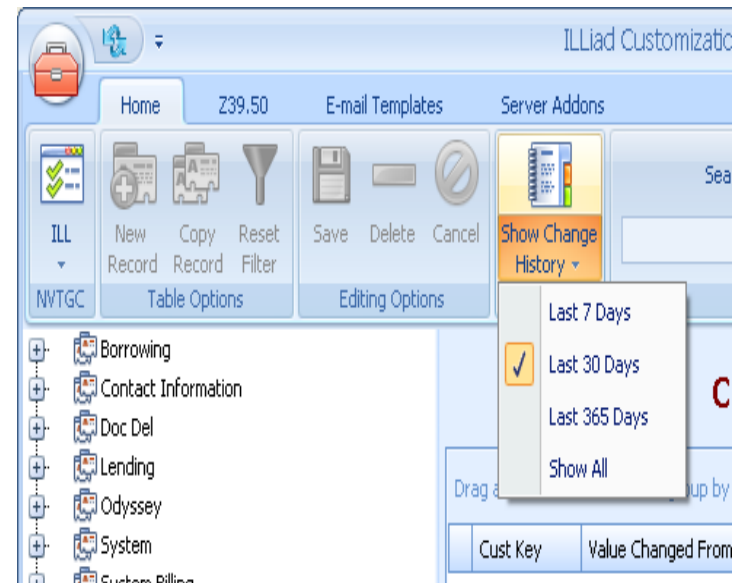
Keys

- If the change is not satisfying or incorrect to the previous setting, double-click on the previous setting to change back.

<http://screencast.com/t/69oPga32p>

History

- Changes can be tracked
 - Optional to track the changes made within a certain amount of days
 - 7 days (1 week)
 - 30 days (1 month)
 - 365 days (1 year)
 - Show All (From beginning)
- Only Keys can be tracked!



Tables

- There are two different types of tables
 1. Creating information that will be displayed for ILLiad users
 - Example: Reasons for Cancellation and Custom Queue
 2. Creating commands to streamline through ILLiad
 - Example: Routing Rules and Email Routing
 - ILLiad will perform accordingly to the specific situation

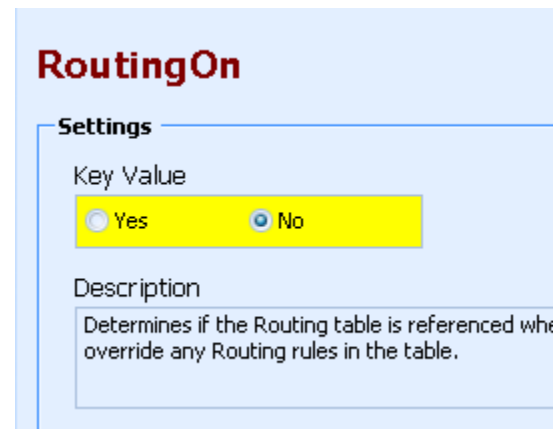
<http://workflowtoolkit.wordpress.com/lending-workflow/routing-rules-lending/>

<http://workflowtoolkit.wordpress.com/borrowing-workflow/routing-rules-borrowing/>



Changes

- Whenever any change occurs in CM, the information will have a yellow background.
 - The yellow indicates the change has not been saved yet
 - If you don't want the change, choose cancel instead.



RoutingOn

Settings

Key Value

☐ Yes ☒ No

Description

Determines if the Routing table is referenced when override any Routing rules in the table.



Favorites



- Are there any specific key or table information the user looks up frequently?
 - Avoid extra time spent on locating the information by bookmarking the information as a favorite
 - Right-click on the item and select “Add Favorite”
 - A dialogue box will appear if the user wants to customize the bookmark’s name
 - If the bookmarked information needs to be removed, right-click on the information and select “Remove Favorite”

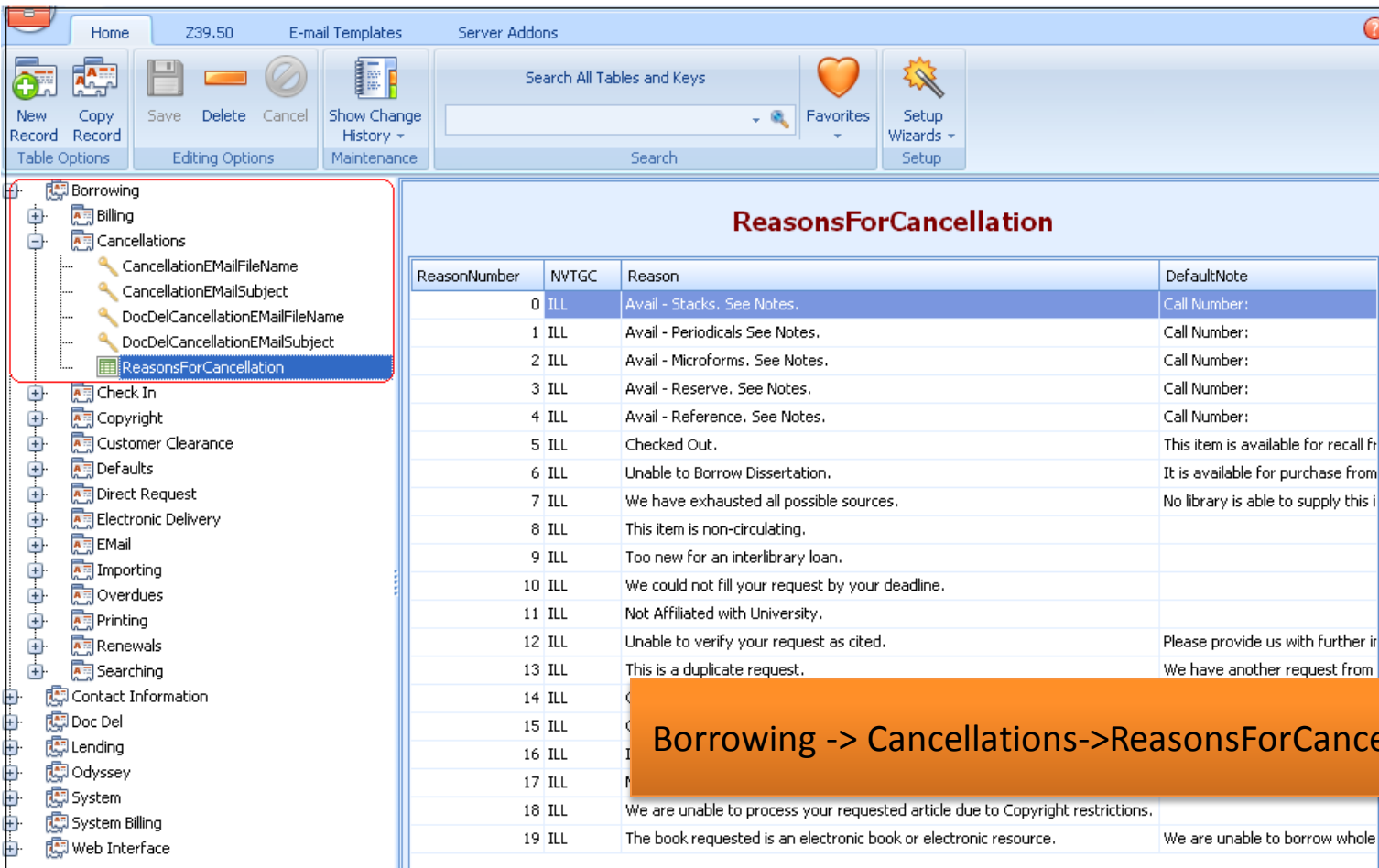
Favorites (Video)

<http://screencast.com/t/dnxAoknc>

Search

- You know what you're looking for but don't know the location?
 - Use the search bar next to the Favorites tab
- <http://screencast.com/t/yewixlCPpqil>

Borrowing Reasons for Cancellation



The screenshot shows the IDS PROJECT software interface. On the left is a navigation tree with categories like Borrowing, Billing, Cancellations, Check In, Copyright, Customer Clearance, Defaults, Direct Request, Electronic Delivery, EMail, Importing, Overdues, Printing, Renewals, Searching, Contact Information, Doc Del, Lending, Odyssey, System, System Billing, and Web Interface. The 'Cancellations' category is expanded, and 'ReasonsForCancellation' is selected. The main area displays a table titled 'ReasonsForCancellation' with columns: ReasonNumber, NVTGC, Reason, and DefaultNote. The table lists 19 reasons for cancellation, such as 'Avail - Stacks. See Notes.', 'Avail - Periodicals See Notes.', 'Avail - Microforms. See Notes.', 'Avail - Reserve. See Notes.', 'Avail - Reference. See Notes.', 'Checked Out.', 'Unable to Borrow Dissertation.', 'We have exhausted all possible sources.', 'This item is non-circulating.', 'Too new for an interlibrary loan.', 'We could not fill your request by your deadline.', 'Not Affiliated with University.', 'Unable to verify your request as cited.', 'This is a duplicate request.', 'We are unable to process your requested article due to Copyright restrictions.', and 'The book requested is an electronic book or electronic resource.'.

| ReasonNumber | NVTGC | Reason | DefaultNote |
|--------------|-------|--|--------------------------------------|
| 0 | ILL | Avail - Stacks. See Notes. | Call Number: |
| 1 | ILL | Avail - Periodicals See Notes. | Call Number: |
| 2 | ILL | Avail - Microforms. See Notes. | Call Number: |
| 3 | ILL | Avail - Reserve. See Notes. | Call Number: |
| 4 | ILL | Avail - Reference. See Notes. | Call Number: |
| 5 | ILL | Checked Out. | This item is available for recall fr |
| 6 | ILL | Unable to Borrow Dissertation. | It is available for purchase from |
| 7 | ILL | We have exhausted all possible sources. | No library is able to supply this i |
| 8 | ILL | This item is non-circulating. | |
| 9 | ILL | Too new for an interlibrary loan. | |
| 10 | ILL | We could not fill your request by your deadline. | |
| 11 | ILL | Not Affiliated with University. | |
| 12 | ILL | Unable to verify your request as cited. | Please provide us with further ir |
| 13 | ILL | This is a duplicate request. | We have another request from |
| 14 | ILL | | |
| 15 | ILL | | |
| 16 | ILL | | |
| 17 | ILL | | |
| 18 | ILL | We are unable to process your requested article due to Copyright restrictions. | |
| 19 | ILL | The book requested is an electronic book or electronic resource. | We are unable to borrow whole |

Borrowing -> Cancellations->ReasonsForCancellation

Editing

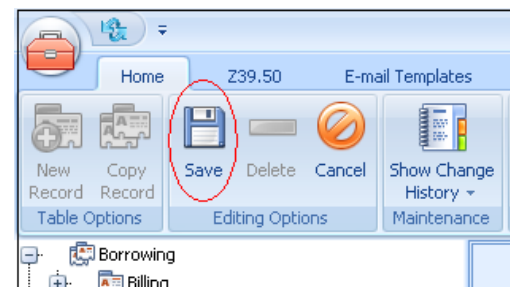
ReasonsForCancellation

| ReasonNumber | NVTGC | Reason | DefaultNote |
|--------------|-------|--|---|
| 13 | ILL | This is a duplicate request. | We have another request from you for the same piece. |
| 14 | ILL | Owned by Special Collections. | |
| 15 | ILL | Other. | |
| 16 | ILL | Item requested is a textbook or is required reading. | The HVCC Interlibrary Loan(ILL) policy states that textbooks or |
| 17 | ILL | Media item (DVDs, CDs, etc.) requested. | The HVCC Interlibrary Loan(ILL) policy states that Media items |
| 18 | ILL | We are unable to process your requested article due to Copyright restrictions. | |
| 19 | ILL | The book requested is an electronic book or electronic resource. | We are unable to borrow whole e-books. Please request another |

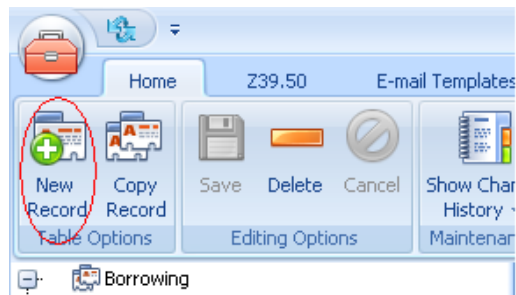
Edit Row

| | |
|---------------|--|
| Reason Number | 16 |
| NVTGC | ILL |
| Reason | Item requested is a textbook or is required reading. |
| Default Note | The HVCC Interlibrary Loan(ILL) policy states that textbooks or required reading are not requested through ILL. See our ILL policy on our website at https://www.hvcc.edu/library/interlibrary-loan/ |

Double click on the Reason Number
Edit the Reason and/or Default Note
Don't Forget to click Save



Creating a New Reason



Click New Record

Enter the next sequential number


Add the Reason

Add a Default Note (optional)

Don't forget to click Save

ReasonsForCancellation

| ReasonNumber | NVTGC | Reason | DefaultNote |
|--------------|-------|--|-----------------------------|
| 13 | ILL | This is a duplicate request. | We have another request fr |
| 14 | ILL | Owned by Special Collections. | |
| 15 | ILL | Other. | |
| 16 | ILL | Item requested is a textbook or is required reading. | The HVCC Interlibrary Loan(|
| 17 | ILL | Media item (DVDs, CDs, etc.) requested. | The HVCC Interlibrary Loan(|
| 18 | ILL | We are unable to process your requested article due to Copyright restrictions. | |
| 19 | ILL | The book requested is an electronic book or electronic resource. | We are unable to borrow wh |



Edit Row

| | |
|---------------|----------------------|
| Reason Number | <input type="text"/> |
| NVTGC | ILL |
| Reason | <input type="text"/> |
| Default Note | <input type="text"/> |

Example

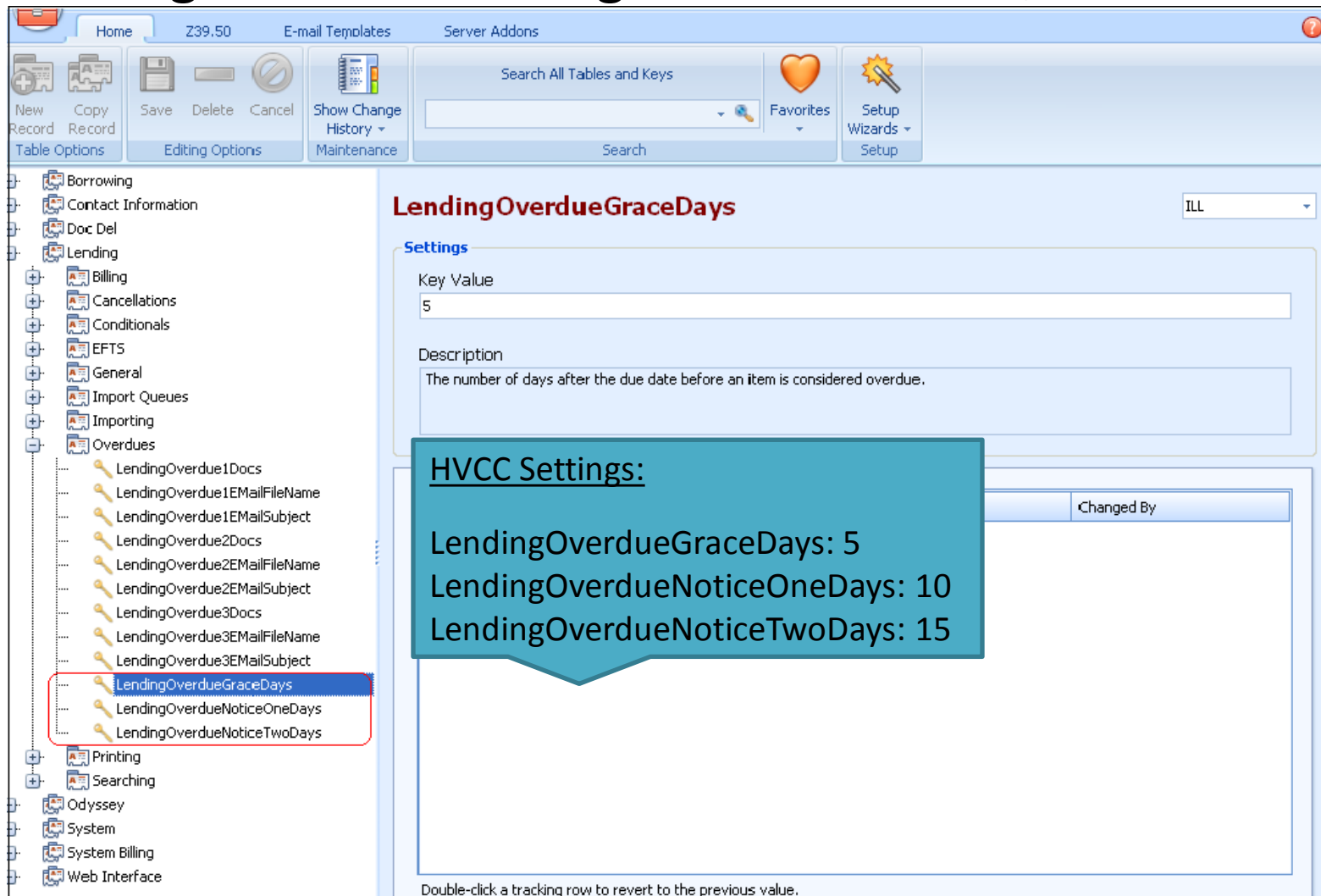
| ReasonsForCancellation | | | |
|------------------------|-------|--|---|
| ReasonNumber | NVTGC | Reason | DefaultNote |
| 13 | ILL | This is a duplicate request. | We have another request from you for the same piece. |
| 14 | ILL | Owned by Special Collections. | |
| 15 | ILL | Other. | |
| 16 | ILL | Item requested is a textbook or is required reading. | The HVCC Interlibrary Loan(ILL) policy states that textbooks or |
| 17 | ILL | Media item (DVDs, CDs, etc.) requested. | The HVCC Interlibrary Loan(ILL) policy states that Media items |
| 18 | ILL | We are unable to process your requested article due to Copyright restrictions. | |
| 19 | ILL | The book requested is an electronic book or electronic resource. | We are unable to borrow whole e-books. Please request another |

III

| Edit Row | |
|---------------|---|
| Reason Number | 19 |
| NVTGC | ILL |
| Reason | The book requested is an electronic book or electronic resource. |
| Default Note | We are unable to borrow whole e-books. Please request another book that does not have [electronic book or electronic resource] in the title. Thank you! |

System->General

Lending Overdue Settings (Customization Manager 8.3.5.0)



The screenshot displays the IDS PROJECT Customization Manager 8.3.5.0 interface. The left sidebar shows a tree view of settings categories, with 'Lending' expanded and 'LendingOverdueGraceDays' selected. The main panel shows the 'LendingOverdueGraceDays' settings, including a 'Key Value' of 5 and a description: 'The number of days after the due date before an item is considered overdue.' A blue callout box highlights the 'HVCC Settings' section, listing: 'LendingOverdueGraceDays: 5', 'LendingOverdueNoticeOneDays: 10', and 'LendingOverdueNoticeTwoDays: 15'.

LendingOverdueGraceDays

Settings

Key Value
5

Description
The number of days after the due date before an item is considered overdue.

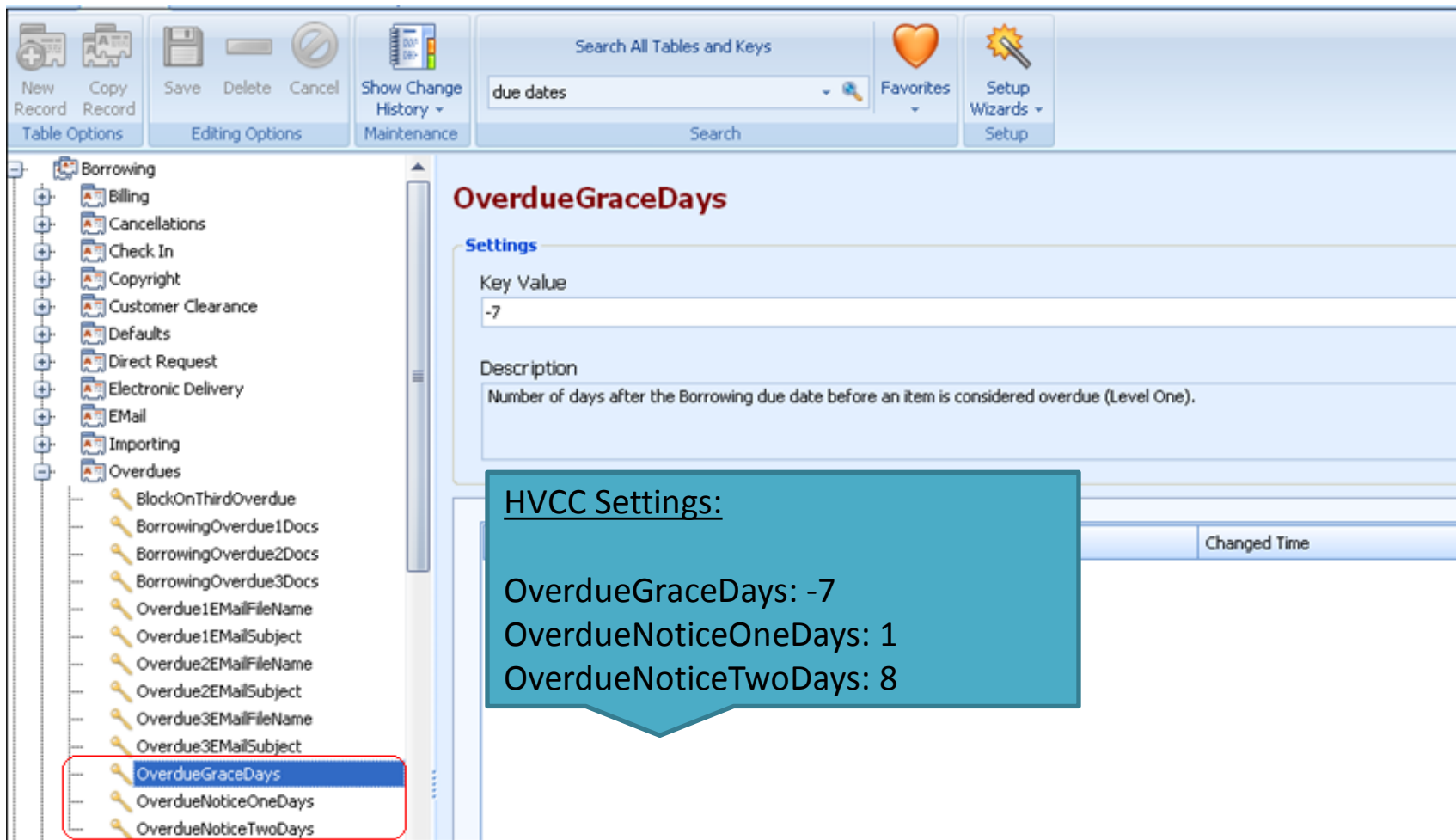
HVCC Settings:

- LendingOverdueGraceDays: 5
- LendingOverdueNoticeOneDays: 10
- LendingOverdueNoticeTwoDays: 15

Changed By

Double-click a tracking row to revert to the previous value.

Borrowing Overdue Settings (Customization Manager 8.3.5.0)



The screenshot displays the Customization Manager 8.3.5.0 interface. The left sidebar shows a tree view of settings categories, with 'Borrowing' expanded and 'OverdueGraceDays' selected. The main panel shows the 'OverdueGraceDays' settings, including a 'Key Value' of -7 and a 'Description' of 'Number of days after the Borrowing due date before an item is considered overdue (Level One)'. A blue callout box highlights the 'HVCC Settings' section, listing 'OverdueGraceDays: -7', 'OverdueNoticeOneDays: 1', and 'OverdueNoticeTwoDays: 8'.

OverdueGraceDays

Settings

Key Value
-7

Description
Number of days after the Borrowing due date before an item is considered overdue (Level One).

HVCC Settings:

- OverdueGraceDays: -7
- OverdueNoticeOneDays: 1
- OverdueNoticeTwoDays: 8

Custom Queues

What are they?

- Holding queues for routing transactions
- Available for borrowing and lending
- Appear in Request Groups, Route menu and patron accounts
- Destination for email routing and routing rules
- Examples: Invoice sent; Extensive search; Waiting for patron's reply, etc.

Custom Queues

Main - ILLiad Client 8.4.1.0

Home Borrowing Document Delivery Lending System

Number ALL

User Information ALL

Citation Information ALL

Search Requests

Username Search

Name Search

ID Search

Main

Borrowing Document Delivery Lending

Requests (7 items)

| | |
|--------------------------------|---|
| Awaiting Request Processing | 1 |
| Awaiting Unfilled Processing | 3 |
| Request in Processing | 1 |
| Awaiting Renewal OK Processing | 1 |
| Under ILL supervisor's review | 1 |

| Tracking | | |
|----------------------|----------------------------------|------------|
| Date/Time | Status | Changed By |
| 4/1/2010 3:16:23 PM | Submitted by Customer | kokamoto |
| 4/1/2010 3:16:23 PM | Awaiting Request Processing | kokamoto |
| 4/1/2010 4:22:55 PM | Request in Processing | daikens |
| 4/1/2010 4:23:53 PM | Request Sent | daikens |
| 4/9/2010 11:35:06 AM | Awaiting Post Receipt Processing | daikens |
| 4/9/2010 11:35:13 AM | Awaiting Customer Contact | daikens |
| 4/9/2010 4:32:24 PM | Customer Notified via E-Mail | daikens |
| 4/9/2010 4:32:25 PM | Checked Out to Customer | daikens |
| 5/3/2010 10:57:27 AM | Renewed by Customer to 5/20/2010 | kokamoto |

54361 - Lending Request

Route Policies Directory Resend Request Billing View Send

Awaiting Lending Request Processing

Awaiting Rush Request Processing

Awaiting Conditional Request Processing

Awaiting Renewal Request Processing

Awaiting Stacks Searching

In Stacks Searching

Awaiting Lending Scanning

Awaiting Shipping Label Printing

In Shipping Label Print Queue

Item Shipped

Request Conditionalized

Cancelled by ILL Staff

Request Finished

Hold Request

Awaiting IDS Lending Request Process

Awaiting ISO ILL Request Processing

Awaiting RUSH Request Processing

EJS periodical/journal title

Invoice sent

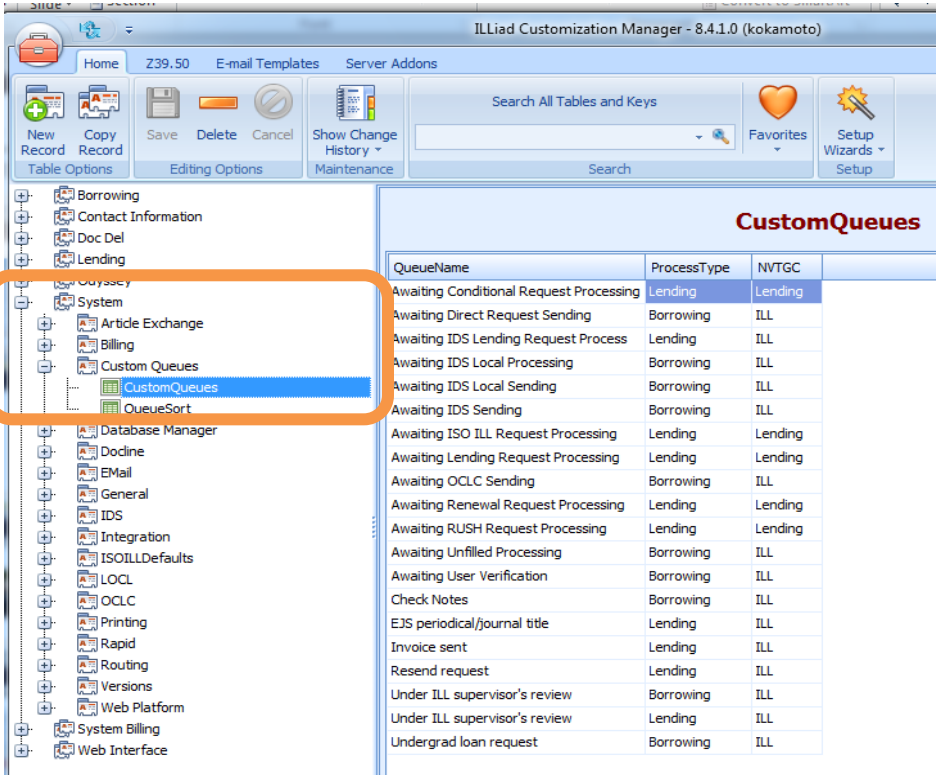
Resend request

Under ILL supervisor's review

Custom Queues

Where are they?

System | Custom Queues

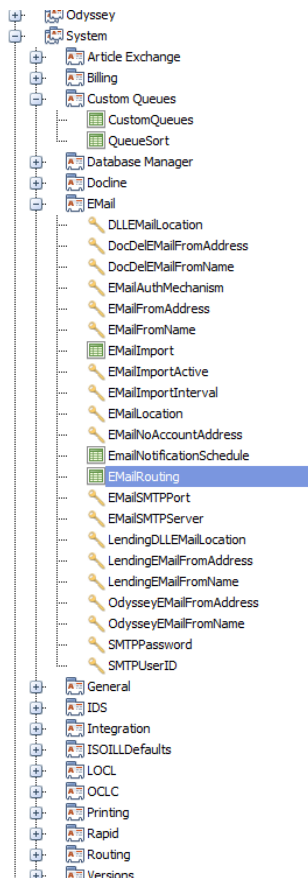


The screenshot shows the ILLiad Customization Manager - 8.4.1.0 (kokamoto) interface. The left sidebar contains a tree view of system components. The 'Custom Queues' item is highlighted with an orange box. The main panel displays a table of custom queues.

| QueueName | ProcessType | NVTGC |
|---|-------------|---------|
| Awaiting Conditional Request Processing | Lending | Lending |
| Awaiting Direct Request Sending | Borrowing | ILL |
| Awaiting IDS Lending Request Process | Lending | ILL |
| Awaiting IDS Local Processing | Borrowing | ILL |
| Awaiting IDS Local Sending | Borrowing | ILL |
| Awaiting IDS Sending | Borrowing | ILL |
| Awaiting ISO ILL Request Processing | Lending | Lending |
| Awaiting Lending Request Processing | Lending | Lending |
| Awaiting OCLC Sending | Borrowing | ILL |
| Awaiting Renewal Request Processing | Lending | Lending |
| Awaiting RUSH Request Processing | Lending | Lending |
| Awaiting Unfilled Processing | Borrowing | ILL |
| Awaiting User Verification | Borrowing | ILL |
| Check Notes | Borrowing | ILL |
| EJS periodical/journal title | Lending | ILL |
| Invoice sent | Lending | ILL |
| Resend request | Lending | ILL |
| Under ILL supervisor's review | Borrowing | ILL |
| Under ILL supervisor's review | Lending | ILL |
| Undergrad loan request | Borrowing | ILL |

Custom Queues

Can be combined with emailing routing



EmailRouting

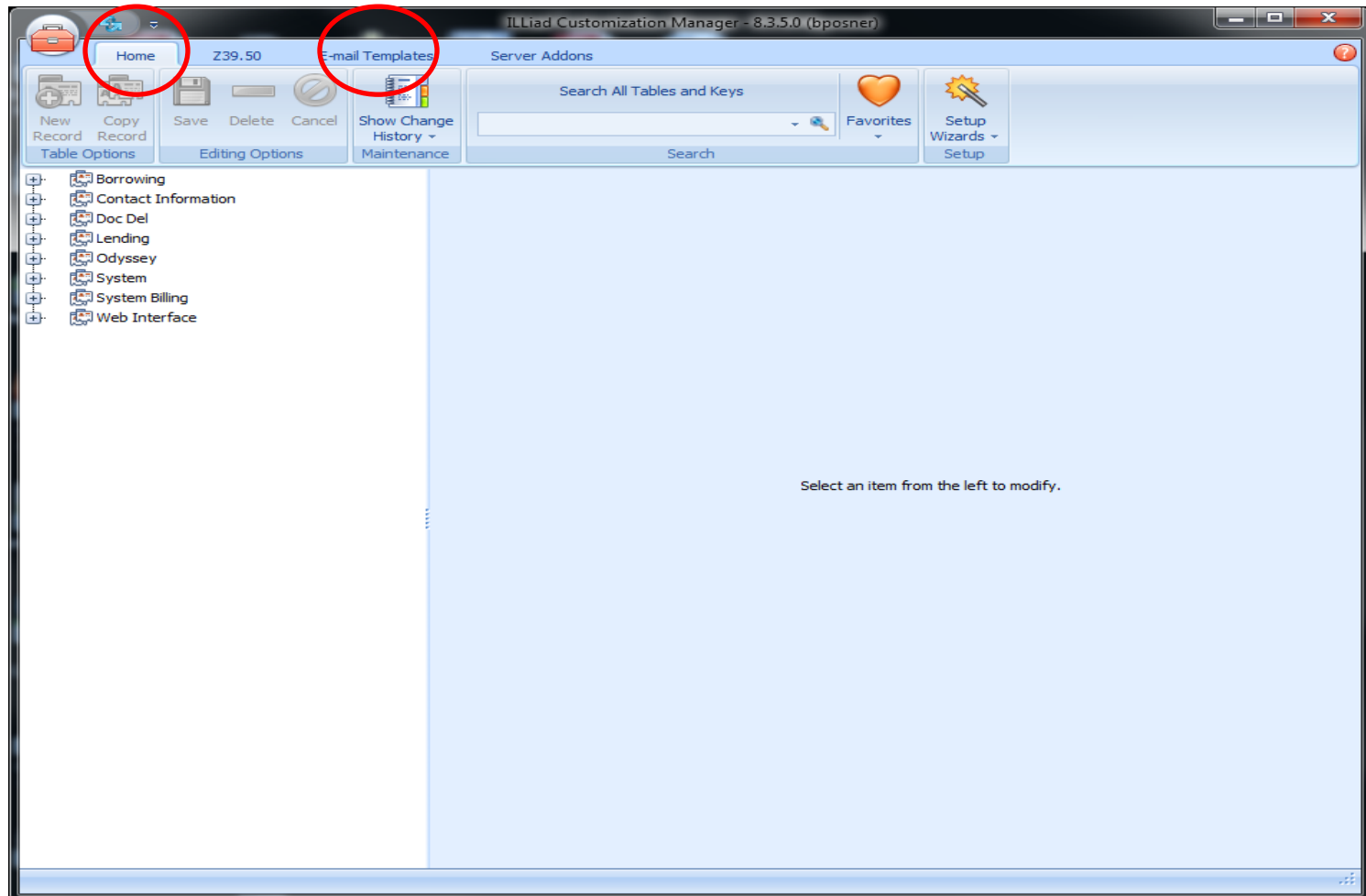
| ProcessType | Name | DefaultToAddress | DefaultToName | DefaultCCAddress | DefaultSubject |
|-------------|-----------------------------|--|---------------|------------------------|---|
| Borrowing | Borrowing Courtesy Notice | | | | Your ILL item is coming due |
| Borrowing | Borrowing Overdue 1 | | | | Your ILL item is overdue |
| Borrowing | Borrowing Overdue 2 | | | | Your ILL item is overdue |
| Borrowing | Borrowing Overdue 3 | | | | Your ILL item is very overdue |
| Borrowing | Item picked up? | | | libill@jjay.cuny.edu | Your interlibrary loan request |
| Borrowing | Library Faculty | | | libill@jjay.cuny.edu | Your ILL request has arrived |
| Borrowing | Limit of 5 journal articles | | | libill@jjay.cuny.edu | Your ILL article requests |
| Borrowing | Loan Recall | | | | Notice of Recalled Item: |
| Borrowing | Patron email | | | libill@jjay.cuny.edu | Your ILL request (#<#TransactionNumber>) |
| Borrowing | Periodical email for Nancy | negan@jjay.cuny.edu | Nancy Egan | kokamoto@jjay.cuny.edu | Journal access problem |
| borrowing | Pick-up reminder | | | | Interlibrary Loan Pick-up Reminder |
| borrowing | Renewal Denied | | | | Your Interlibrary Loan request (#<#TransactionNumber>) |
| borrowing | Renewal OK | | | | Your ILL request (#<#TransactionNumber>) has been renewed |
| Borrowing | Resend article request | <#LenderAddressBorrowingDepartmentEmail> | | libill@jjay.cuny.edu | ILL resend request |
| Borrowing | Same journal issue email | | | libill@jjay.cuny.edu | Your ILL request for articles |
| Borrowing | Undergrad loan request | | | | Your ILL book request |
| Lending | Article Exchange | <#LenderAddressBorrowingDepartmentEmail> | | | ILL article request <#ILLNumber> from VVJ |
| Lending | Invoice | | | | Invoice for ILL <#ILLNumber> |
| Lending | Lending Overdue 2 | | | | ILL Overdue Notice |

Edit Row

| | |
|--------------------|--|
| ProcessType | Borrowing |
| Name | Patron email |
| DefaultToAddress | |
| DefaultToName | |
| DefaultCCAddress | libill@jjay.cuny.edu |
| DefaultSubject | Your ILL request (#<#TransactionNumber>) |
| DefaultFromAddress | libill@jjay.cuny.edu |
| DefaultFromName | John Jay ILL |
| DefaultStatus | Waiting for patron email reply |
| FileNameLoan | borrowing_patron_email.txt |
| FileNameArticle | borrowing_patron_email.txt |
| NVTGC | ILL |

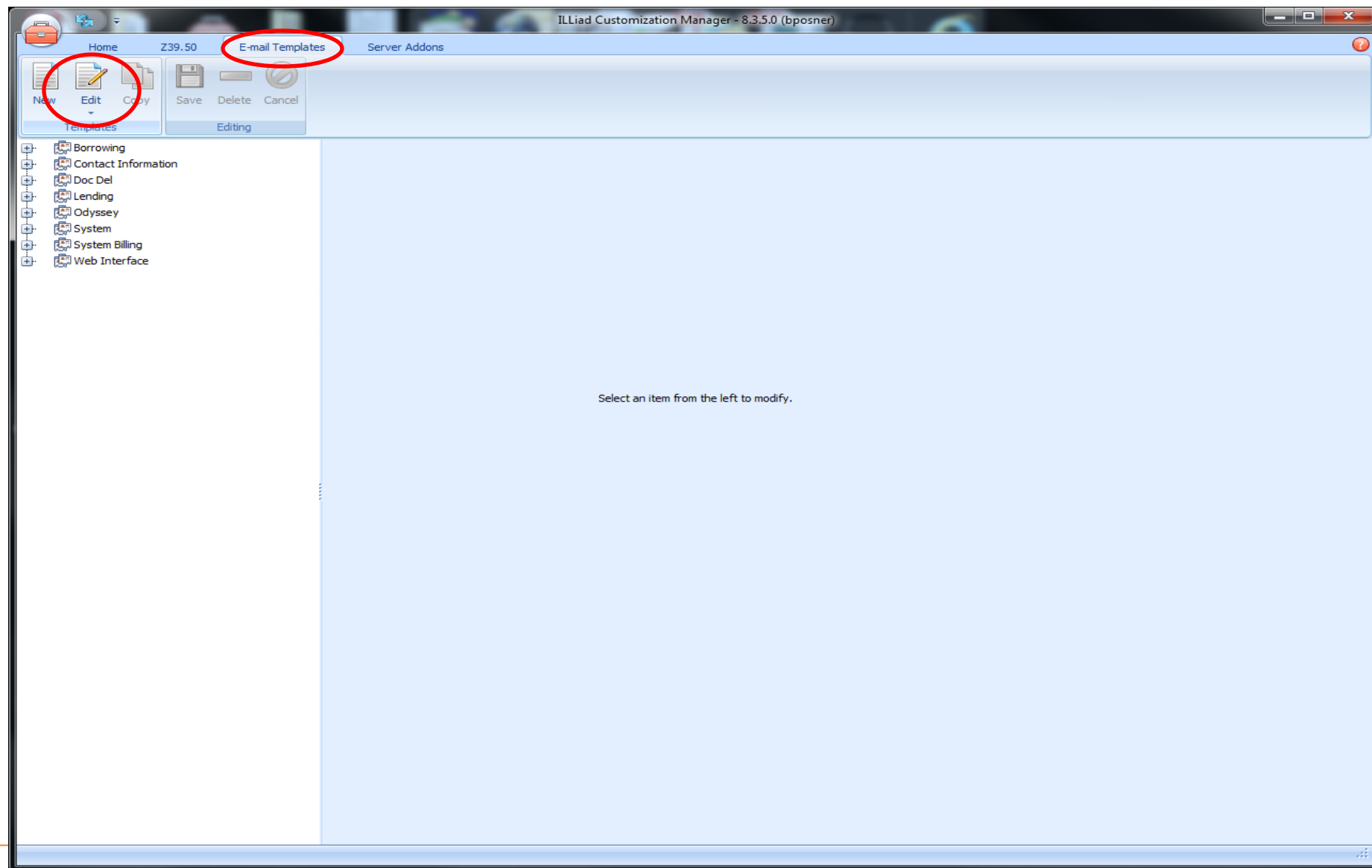


Customization Manager...EMAILS



Customization Manager...EMAILS

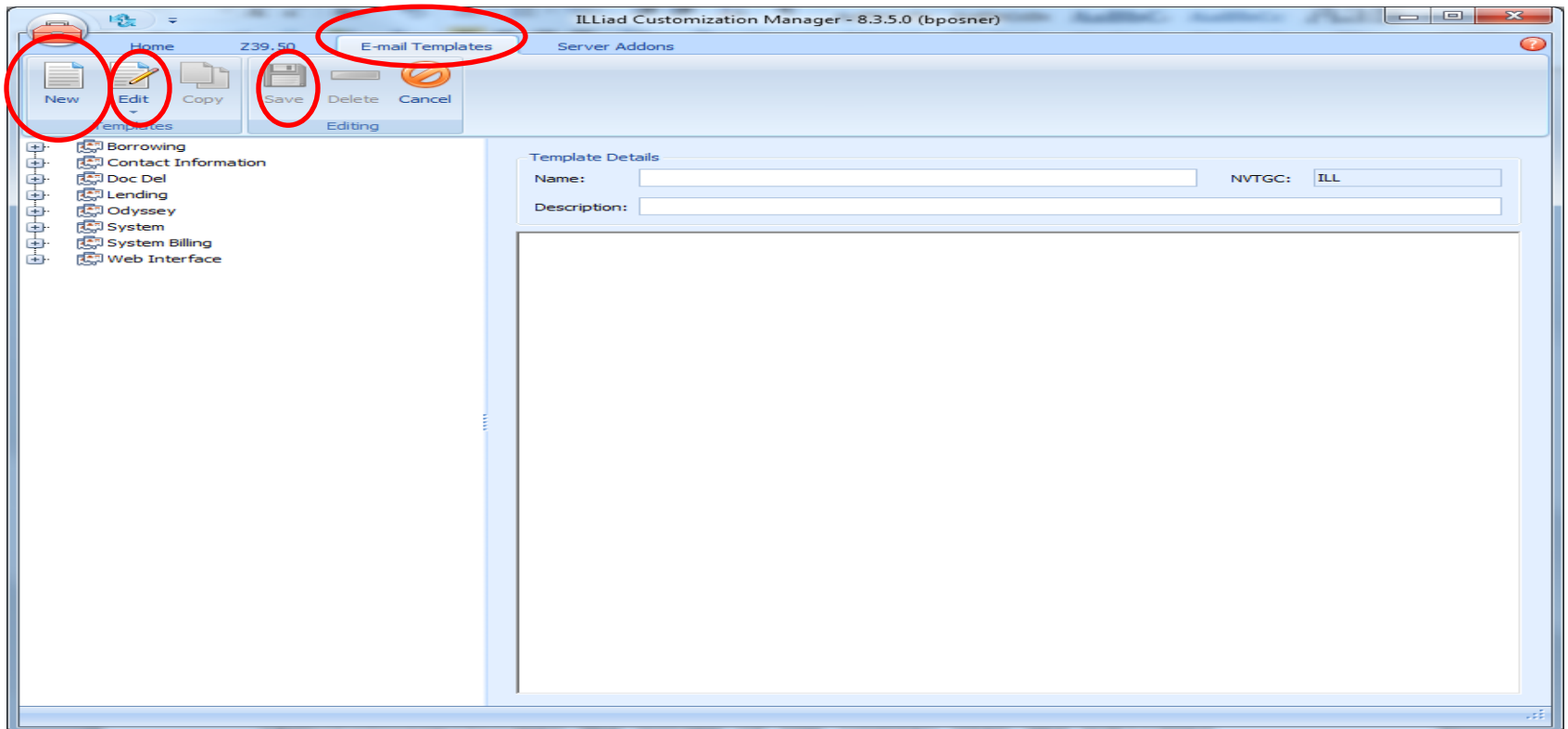
- You can move any **additional** emails that you have created to the CM once you're on 8.3 or 8.4
 - Check under System->E-mail->EMailLocation key to see if you placed them elsewhere
 - Originally they were in the client relative path (C:\Program Files\ILLiad\Email) and they may still be there
 - It is easier for future editing if they are in CM
 - It is easier to manage them if they are all in one place.
 - But, if you do not move them, ILLiad will still look wherever you specified in ILLiad under System->E-mail->EMailLocation key, and lastly searches the client relative path(C:\Program Files\ILLiad\Email).



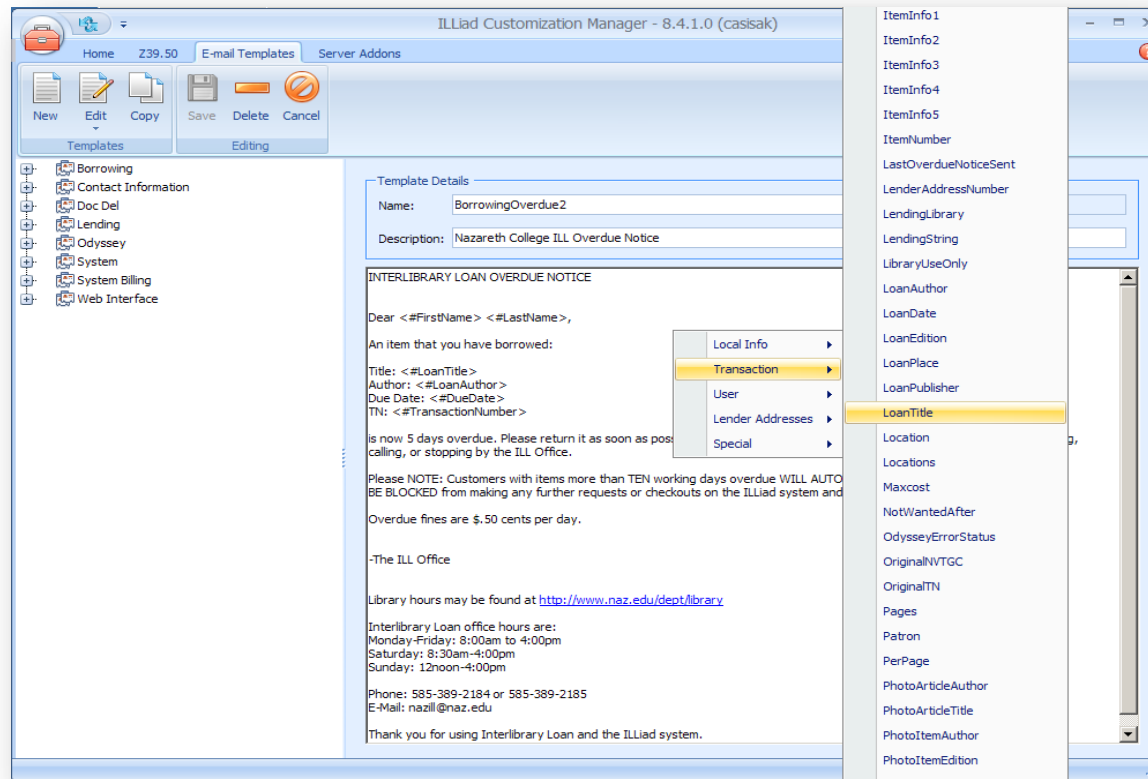
Customization Manager...

EMAILS

- To Create New Emails
 - click on E-mail Templates and then New



Customization Manager...EMAILS



Customization Manager...EMAILS

- You can also look up field names at <http://www.atlas-sys.com/documentation/illiad/content/ILLiadDatabaseDiagram.pdf>
- Or, IDS has a cheat sheet will allow you to make basic adjustments to your email templates, or new additions to your email templates with ease, as well as a list of basic email templates
 - <http://idsproject.org/emailtemplates.aspx>

Customization Manager...EMAILS

- **Basic book and journal information**
- <#LoanTitle> The title of the book
- <#LoanAuthor> The Author of the book
- <#LoanEdition> The edition of the book
- <#PhotoJournalTitle> The title of the journal
- <#PhotoJournalYear> The year that the journal was published
- <#PhotoJournalVolume> The volume of the journal that was published
- <#PhotoJournalIssue> The issue of the journal that was published
- <#PhotoJournalInclusivePages> Pages from the item that the patron is requesting. This includes book chapters, or journal articles.
- <#PhotoArticleTitle> The title of the article or book chapter that a patron is requesting
- <#LoanAuthor> The author of a book or monograph
- <#PhotoArticleAuthor> The author of an article or book chapter

Customization Manager...EMAILS

- **Basic contact information for the patron:**
- <#FirstName> The patrons first name
- <#LastName> The Patrons last name
- **Your library's contact information**
- <#SystemName> This is your library's name.
- <#LibraryName> This is also the library's name <#GeneralEMailAddress> The libraries general ILL email address. <#GeneralPhone> The Libraries general ILL Phone Number
- **Borrowing**<#BorrowingHours> The time that you are open for business with regards to borrowing<#BorrowingEMailAddress> The email address of the person who handles your borrowing. This could be the same as your lending and your general email address depending on how big your department is.<#BorrowingPhone> This is the phone number of your person in charge of borrowing. It could be the same as your general phone number and your lending phone number.<#BorrowingContactName> The person in charge of borrowing. This could also be the same as the lending contact person <#LoanDate> The Date that the item was loaned out<#DueDate> The date that the item is due <#DocumentType> Type of loan request.
- <#ILLNumber> ILLiad Transaction Number
- <#TransactionNumber> Transaction Number
- <#OCLCSymbol> The OCLC Symbol of the library
- <#RenewalsAllowed> If renewals are allowed. This is a Yes or No Field



Questions and Discussion

Thank you!

Further information can be found in the IDS Project Workflow Toolkit at:

<http://toolkit.idsproject.org/>

Or

Atlas Systems:

<https://prometheus.atlas-sys.com/display/illiad/ILLiad+Customization+Manager>

(Version 8.4)