

Customization Manager 501

Welcome

Customization Manager 501 is right for you if:

- You know what the Customization Manager is
- You have to troubleshoot ILLiad and have technical expertise.
- You understand the phrase “Change a Key Value”



Your Presenters



Tim Bowersox
Geneseo (YGM)



Chris Sisak
Nazareth (XNC)



Bill Jones
IDS Project (YGM)



Logan Rath
Brockport (XBM)

Who are you?

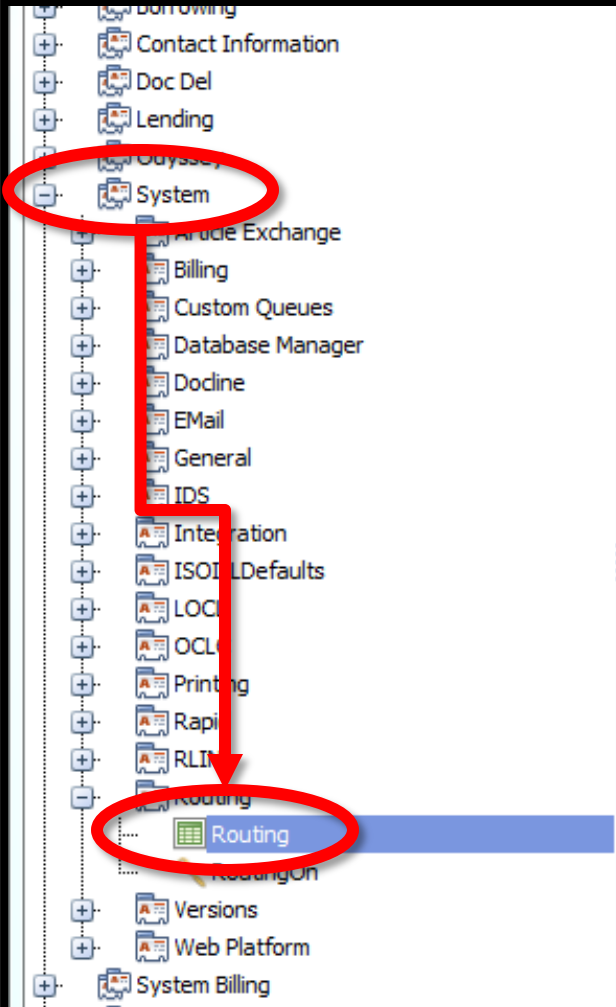
- Name
- Campus
- Customization Manager experience

Routing Rules

Or...

How to move a request from





Routing

RuleNo	RuleActive	ProcessType	TransactionStatus	MatchString
0	Yes	Borrowing	Awaiting Copyright Clearance	t.DocumentType = 'Eres' AND t.
1	Yes	Borrowing	Awaiting Copyright Clearance	t.RequestType='Article'
2	Yes	Borrowing	Awaiting Request Processing	t.RequestType='Article' AND t.L
3	Yes	Borrowing	Awaiting Request Processing	u.Status='GIST Guest'
5	Yes	Borrowing	Awaiting Request Processing	(select 1 FROM GISTWeb gw W
7	Yes	Borrowing	Awaiting Request Processing	(select 1 FROM GISTWeb gw W
8	Yes	Borrowing	Awaiting Request Processing	(select 1 FROM GISTWeb gw W
9	Yes	Borrowing	Awaiting Request Processing	(select 1 FROM GISTWeb gw W
10	Yes	Borrowing	Awaiting Request Processing	(select 1 FROM GISTWeb gw W
11	Yes	Borrowing	Awaiting Request Processing	len(t.LoanDate) = 4 and t.Loan
13	No	Borrowing	Awaiting Request Processing	(select 1 FROM GISTWeb gw W
14	Yes	Borrowing	Awaiting Request Processing	t.RequestType='Loan' AND ISN
15	Yes	Borrowing	Awaiting Request Processing	t.RequestType='Loan' AND t.Tr
16	Yes	Borrowing	Awaiting IDS Local Processing	u.Status=u.Status
17	Yes	Borrowing	Milne Delivered to Web	u.Status=u.Status
18	Yes	Borrowing	Available in Milne	u.Status=u.Status
19	Yes	Borrowing	Awaiting Document Delivery Processing	t.Location <> NULL AND t.Loca
23	Yes	Borrowing	Delivered to Web	t.DocumentType = 'Eres'
24	No	Borrowing	Awaiting Return Label Printing	t.TransactionNumber In (select
25	Yes	Doc Del	Purchase Request Denied	u.Status=u.Status
28	Yes	Lending	Awaiting Shipping Label Printing	t.RequestType = 'Loan'

RuleNo	14
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	t.RequestType='Loan' AND ISNULL(t.LendingString,"") not in ('Direct Request','RAPID','Manual Request',"")
NewProcessType	Borrowing
NewTransactionStatus	Awaiting OCLC Sending
RuleDescription	Routing rule for IDS Circulation Availability Service

Anatomy of a routing rule

- **RuleNo** = Each rule waits in line. This sets the order.
- **RuleActive** = The on/off switch.
- **ProcessType** = Apply this rule to Borrowing, Lending, or Doc Del.
- **TransactionStatus** = Apply this rule to a specific queue.
- **MatchString** = Apply this rule if it matches your criteria.
- **NewProcessType** = Move the request to Borrowing, Lending, or Doc Del.
- **NewTransactionStatus** = Move the request to a specific queue.
- **RuleDescription** = A brief note explaining what this rule does.



- You can't spell MatchString without SQL
 - Boolean operators: **AND, OR, NOT**
 - Comparison operators: =, <>, >, <, >=, <=
 - Use **NULL** to test for empty fields
 - Can incorporate advanced SQL functions (i.e. "select")
 - ***Never*** use double-quotes
 - All fields have table prefixes (i.e. "u.Status")
 - Don't exceed 255 characters



- MatchStrings can look at data from:
 - **Transactions** table
 - **Users** table (Borrowing & Doc Del)
 - **LenderAddresses** table (Lending)
- Route between Borrowing & Doc Del
- Move to any queue – including custom queues

- Routing rule rules to live by
 - Routing rules **cannot** update an OCLC status
 - No daisy chaining
 - Order is important
 - Requests can get stuck in loops
 - Too many rules will slow down ILLiad
 - Rube Goldbergs can break ILLiad

To the future!



System Addons will change routing forever!

- Route *and* change OCLC status!
- No character limits!
- Complex algorithms!
- Downloadable!
- They're bigger on the inside!

Email Templates in the Customization Manger

Discuss the following:

Talk with a partner and brainstorm one way you could make an email you send, better.

- Adding unique information from the request
- Changing the language of an email to sound like a human sent it



To copy over an email:

1. Open an email file that you currently use
2. Choose E-mail Templates in the ribbon.
3. Click New to add a new email
4. Give the email a name (.txt not required)
5. Give the email a description (not used anywhere)
6. Copy and paste the body of the email into the editor.

[Documentation](#)



Don't forget the Workflow Toolkit

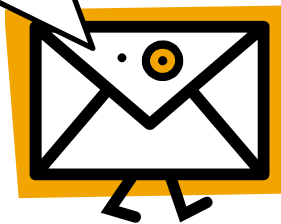
<http://idsproject.org/emailtemplates.aspx>

Tips and tricks

- Right-click to get a field name when typing
- There's no spell-check! (use Word first)
- Name: must match exactly in the EmailRouting table

When an email and a routing rule really love each other...

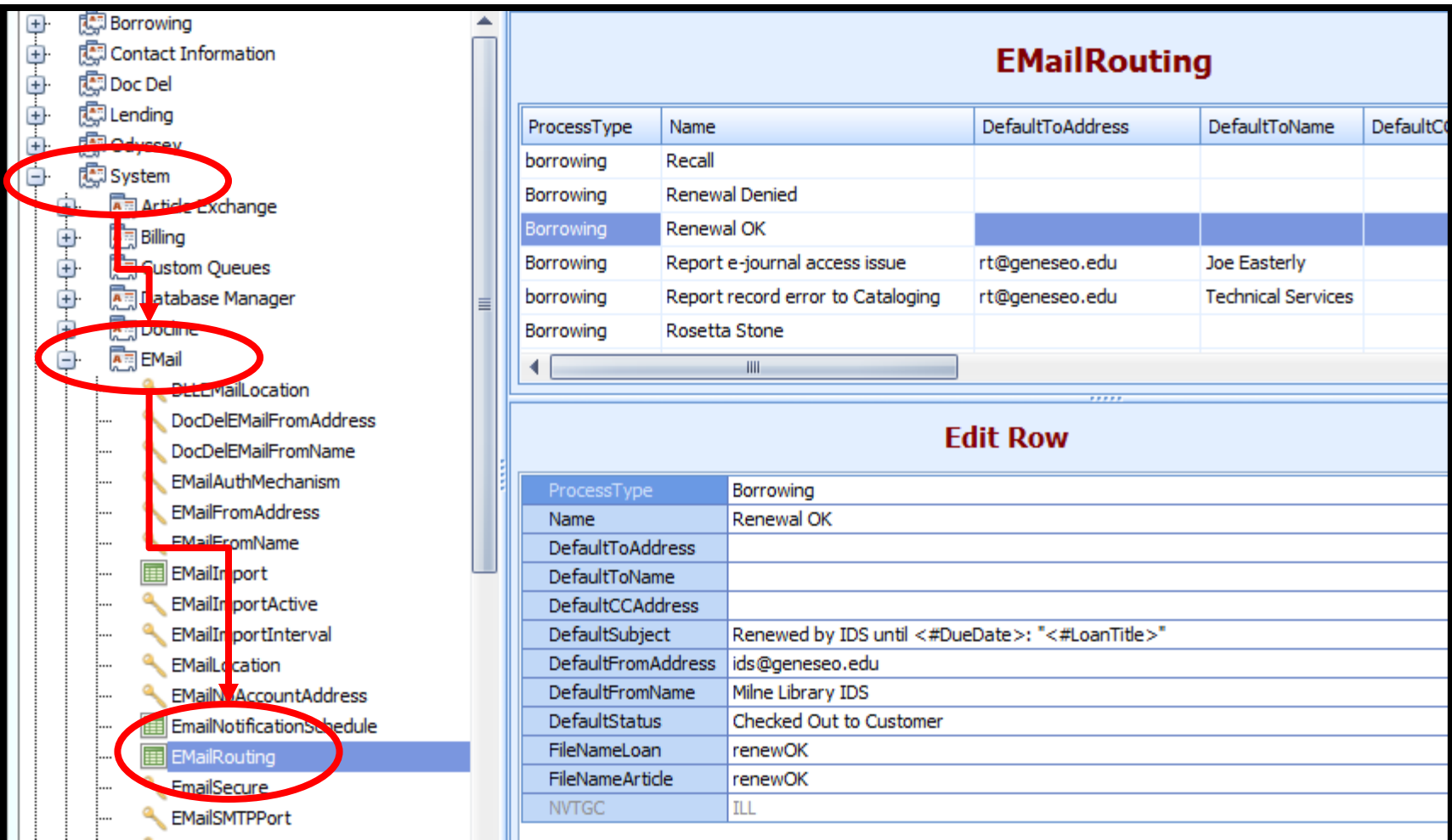
We're a perfect
MatchString, baby



Let's update our
Transaction Status

RuleNo
RuleActive
ProcessType
TransactionStatus
MatchString
NewProcessType
NewTransactionStatus
RuleDescription

They make something really special



EMailRouting

ProcessType	Name	DefaultToAddress	DefaultToName	DefaultCC
borrowing	Recall			
Borrowing	Renewal Denied			
Borrowing	Renewal OK			
Borrowing	Report e-journal access issue	rt@geneseo.edu	Joe Easterly	
borrowing	Report record error to Cataloging	rt@geneseo.edu	Technical Services	
Borrowing	Rosetta Stone			

Edit Row

ProcessType	Borrowing
Name	Renewal OK
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Renewed by IDS until <#DueDate>: "<#LoanTitle>"
DefaultFromAddress	ids@geneseo.edu
DefaultFromName	Milne Library IDS
DefaultStatus	Checked Out to Customer
FileNameLoan	renewOK
FileNameArticle	renewOK
NVTGC	ILL

Workform Mapping

1. What is it?
2. Where is it?
3. Fields you need to know about
4. Why do you need it?

Workform Mapping: What is it?

It tells ILLiad what information to import into the OCLC Work Form when requesting items via OCLC.

General Information							
ILL	106074967	Borrower	XNC	Req Date	20130620	Need Before	20130720
Status	RECEIVED 20130625	Patron	Sisak, Christine	Rec Date	20130625	Renewal Req	
OCLC	86109888	Source	ILLiad	Due Date	20130815	New Due Date	
Lending String	*SYB,BUF,NYG,NYG,RRR			Alert			

Bibliographic Information			
U Title		Title	Personal information management /
Author		Edition	
Article		Series	
Imprint	Seattle : University of Washington Press, c2007.		
Date			
Verified	<TN:382377> OCLC		

GENERAL RECORD INFORMATION	
Request Identifier: 106074967	Status: RECEIVED
Request Date: 20130620	Source: ILLiad
OCLC Number: 86109888	Need Before: 20130720
Borrower: XNC	Renewal Request:
Receive Date: 20130625	New Due Date:
Due Date: 20130815	
Lenders: *SYB, BUF, NYG, NYG, RRR	
Request Type: Loan	

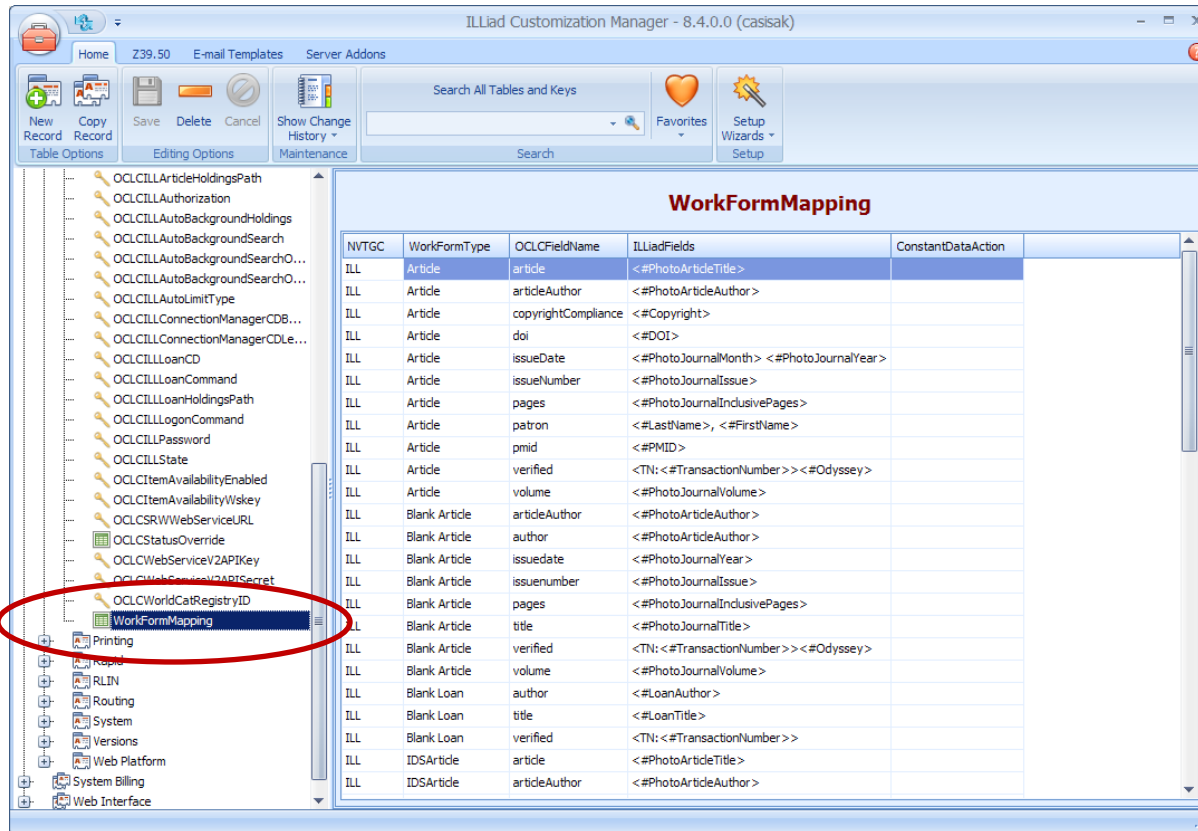
BIBLIOGRAPHIC INFORMATION	
Search the Naz Library Catalog	
Title: Personal information management /	
ISBN: 9780295987552 (hc : alk. paper)	
Imprint: Seattle : University of Washington Press, c2007.	
Verified: <TN:382377> OCLC	

MY LIBRARY'S HOLDINGS INFORMATION	

BORROWING INFORMATION	
Patron: Sisak, Christine	

Workform Mapping: Where is it?

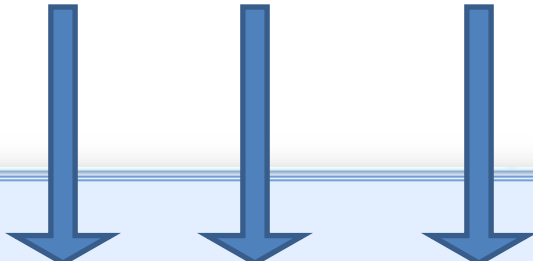
System | OCLC | WorkFormMapping



The screenshot shows the ILLiad Customization Manager interface. The left sidebar contains a tree view of system components, with 'WorkFormMapping' highlighted. The main window displays a table titled 'WorkFormMapping' with the following data:

NVTGC	WorkFormType	OCLCFieldName	ILLiadFields	ConstantDataAction
ILL	Article	article	<#PhotoArticleTitle>	
ILL	Article	articleAuthor	<#PhotoArticleAuthor>	
ILL	Article	copyrightCompliance	<#Copyright>	
ILL	Article	doi	<#DOI>	
ILL	Article	issueDate	<#PhotoJournalMonth> <#PhotoJournalYear>	
ILL	Article	issueNumber	<#PhotoJournalIssue>	
ILL	Article	pages	<#PhotoJournalInclusivePages>	
ILL	Article	patron	<#LastName>, <#FirstName>	
ILL	Article	pmid	<#PMID>	
ILL	Article	verified	<TN: <#TransactionNumber>> <#Odyssey>	
ILL	Article	volume	<#PhotoJournalVolume>	
ILL	Blank Article	articleAuthor	<#PhotoArticleAuthor>	
ILL	Blank Article	author	<#PhotoArticleAuthor>	
ILL	Blank Article	issuedate	<#PhotoJournalYear>	
ILL	Blank Article	issuenumber	<#PhotoJournalIssue>	
ILL	Blank Article	pages	<#PhotoJournalInclusivePages>	
ILL	Blank Article	title	<#PhotoJournalTitle>	
ILL	Blank Article	verified	<TN: <#TransactionNumber>> <#Odyssey>	
ILL	Blank Article	volume	<#PhotoJournalVolume>	
ILL	Blank Loan	author	<#LoanAuthor>	
ILL	Blank Loan	title	<#LoanTitle>	
ILL	Blank Loan	verified	<TN: <#TransactionNumber>>	
ILL	IDSArticle	article	<#PhotoArticleTitle>	
ILL	IDSArticle	articleAuthor	<#PhotoArticleAuthor>	

Workform Mapping: Fields



WorkFormMapping				
NVTGC	WorkFormType	OCLCFieldName	ILLiadFields	ConstantDataAction
ILL	IDSArticle	issueNumber	<#PhotoJournalIssue>	
ILL	IDSArticle	pages	<#PhotoJournalInclusivePages>	
ILL	IDSArticle	patron	<#LastName>, <#FirstName>	
ILL	IDSArticle	pmid	<#PMID>	
ILL	IDSArticle	title	<#PhotoJournalTitle>	
ILL	IDSArticle	verified	<TN: <#TransactionNumber>><#Odyssey>	
ILL	IDSArticle	volume	<#PhotoJournalVolume>	
ILL	Loan	doi	<#DOI>	
ILL	Loan	patron	<#LastName>, <#FirstName>	
ILL	Loan	pmid	<#PMID>	
ILL	Loan	verified	<TN: <#TransactionNumber>>	
ILL	OCLC Article	artideAuthor	<#PhotoArticleAuthor>	
ILL	OCLC Article	author	<#PhotoArticleAuthor>	
ILL	OCLC Article	doi	<#DOI>	
ILL	OCLC Article	issuedate	<#PhotoJournalYear>	

Workform Mapping: Fields

ILL	Blank Loan	title	<#LoanTitle>
ILL	Blank Loan	verified	<TN:<#TransactionNumber>>
ILL	IDSArticle	article	<#PhotoArticleTitle>
ILL	IDSArticle	articleAuthor	<#PhotoArticleAuthor>
ILL	IDSArticle	copyrightCompliance	<#Copyright>
ILL	IDSArticle	doi	<#DOI>
ILL	IDSArticle	issuedate	<#PhotoJournalMonth> <#PhotoJournalYear>
ILL	IDSArticle	issueNumber	<#PhotoJournalIssue>
ILL	IDSArticle	pages	<#PhotoJournalInclusivePages>
ILL	IDSArticle	patron	<#LastName> <#FirstName>

Can only be one OCLCFieldName per entry,
but can have multiple ILLiad field names per entry

Workform Mapping: OCLC Fields

- affiliation
- article
- articleauthor
- author
- billingnotes
- billto
- borrowingnotes
- callnumber
- copyrightcompliance
- dissertation
- doi
- edition
- email
- fax
- Imprint
- Insurance
- isbn
- issn
- issuedate
- issuenumber
- locations
- maxcostamount
- maxcosttype
- needbeforedate
- pages
- patron
- patronaddress
- patrondepartment
- patronemail
- patronfax
- patronid
- patronnotes
- patronphone
- patronpickuplocation
- patronstatus
- pmid
- series
- shipto
- shipvia
- title
- uniformtitle
- verified
- volume



Workform Mapping: Why?

- Adding or deleting fields you no longer wish imported into the OCLC request

Example: Deleting/Editing Patron information

ILL	IDSArticle	volume	<#PhotoJournalVolume>
ILL	Loan	doi	<#DOI>
ILL	Loan	patron	<#LastName>, <#FirstName>
ILL	Loan	pmid	<#PMID>

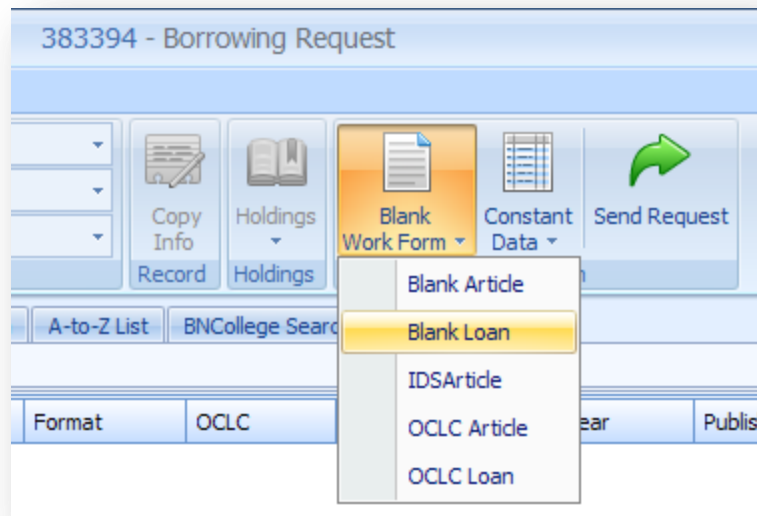
Switch out <#LastName>, <#FirstName> and leave blank or insert <#Username>

Workform Mapping: Why?

- Having Appropriate fields filling in when using the Blank Workform Requests

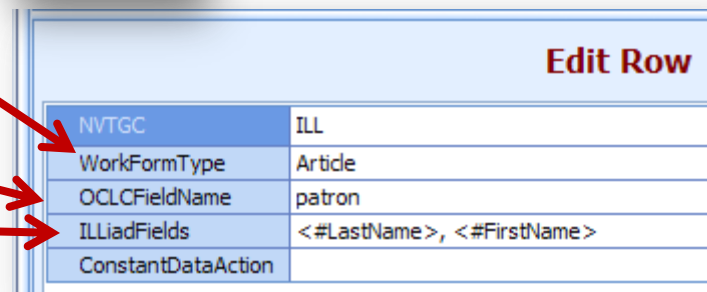
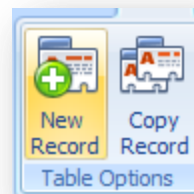
Example: Adding/fixing the blank Article/blank Loan workforms

- Non-cataloged items
 - Honors' Theses
 - Specialized collection material
 - ERIC docs



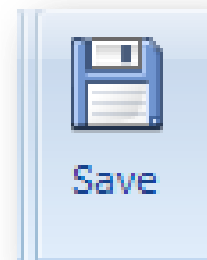
Workform Mapping: Adding Entries

- New Record icon
- Identify the WorkFormType
- Identify the OCLC field name
- Map to it:
 - any fields in the ILLiad Transactions, Users or LocalInfo tables
 - Any text message you wish to add



Edit Row

NVTGC	ILL
WorkFormType	Article
OCLCFieldName	patron
ILLiadFields	<#LastName>, <#FirstName>
ConstantDataAction	



Don't forget to save!



Workform Mapping: More Info

- <https://prometheus.atlas-sys.com/display/illiad/The+WorkFormMapping+Table>



ILLiad Web Forms

- Creating generic request forms
- Customizing current forms
- Understanding the deployment package
- Knowing what files you need to change

Where can I download the “Out of the Box”
version of ILLiad Web Forms?

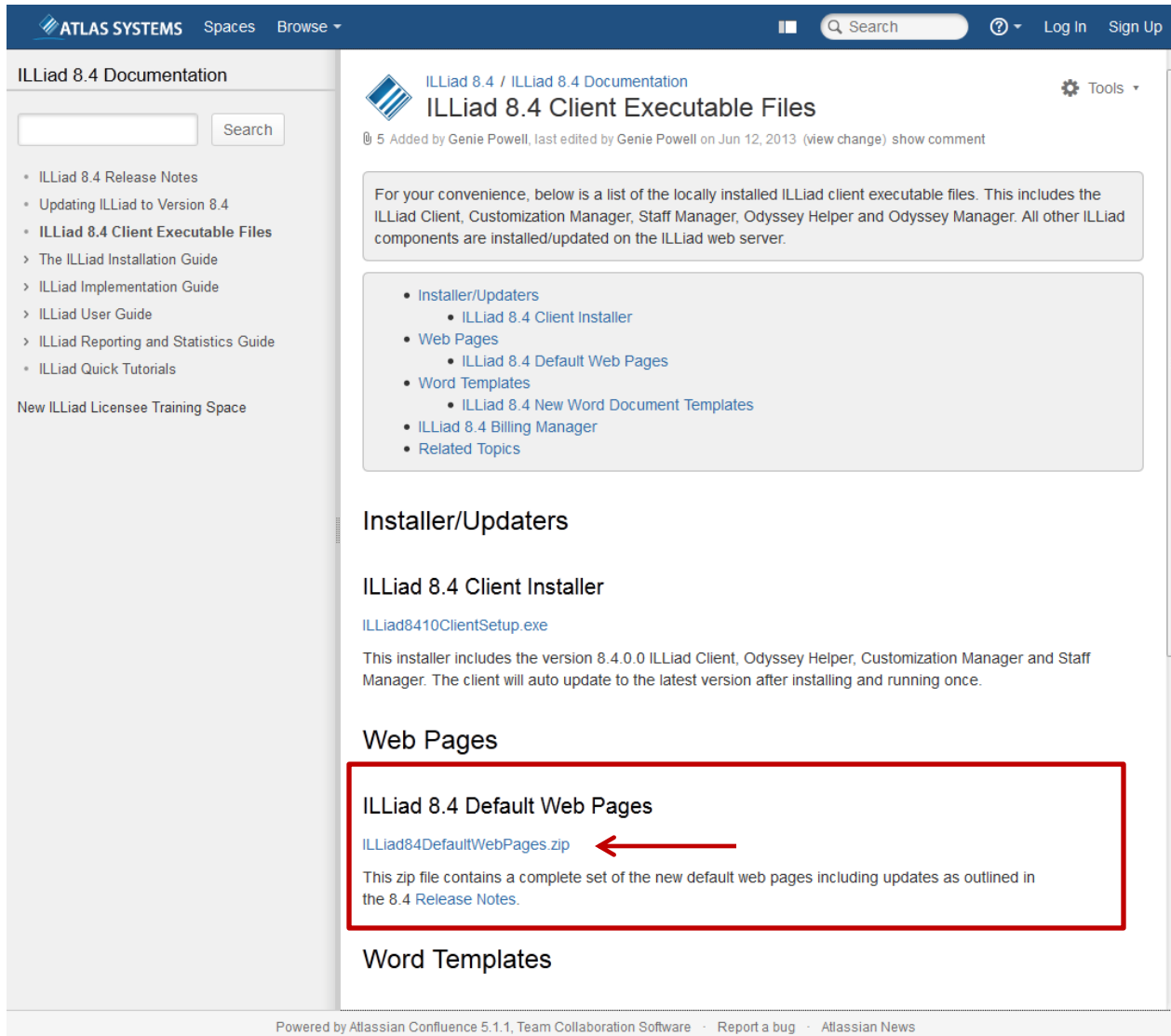
[https://prometheus.atlas-sys.com/display/illiad/
ILLiad+8.4+Client+Executable+Files#ILLiad8.4ClientExecutableFiles-WebPages](https://prometheus.atlas-sys.com/display/illiad/ILLiad+8.4+Client+Executable+Files#ILLiad8.4ClientExecutableFiles-WebPages)

Or ... use  and search

ILLiad executable

Quoted phrase search not necessary (librarian joke)





ATLAS SYSTEMS Spaces Browse

ILLiad 8.4 Documentation

Search

- ILLiad 8.4 Release Notes
- Updating ILLiad to Version 8.4
- **ILLiad 8.4 Client Executable Files**
 - › The ILLiad Installation Guide
 - › ILLiad Implementation Guide
 - › ILLiad User Guide
 - › ILLiad Reporting and Statistics Guide
- ILLiad Quick Tutorials

New ILLiad Licensee Training Space

ILLiad 8.4 / ILLiad 8.4 Documentation

ILLiad 8.4 Client Executable Files

5 Added by Genie Powell, last edited by Genie Powell on Jun 12, 2013 (view change) show comment

For your convenience, below is a list of the locally installed ILLiad client executable files. This includes the ILLiad Client, Customization Manager, Staff Manager, Odyssey Helper and Odyssey Manager. All other ILLiad components are installed/updated on the ILLiad web server.

- **Installer/Updaters**
 - [ILLiad 8.4 Client Installer](#)
- **Web Pages**
 - [ILLiad 8.4 Default Web Pages](#)
- **Word Templates**
 - [ILLiad 8.4 New Word Document Templates](#)
- [ILLiad 8.4 Billing Manager](#)
- [Related Topics](#)

Installer/Updaters

ILLiad 8.4 Client Installer

[ILLiad8410ClientSetup.exe](#)

This installer includes the version 8.4.0.0 ILLiad Client, Odyssey Helper, Customization Manager and Staff Manager. The client will auto update to the latest version after installing and running once.

Web Pages

ILLiad 8.4 Default Web Pages
































































[ILLiad84DefaultWebPages.zip](#)

This zip file contains a complete set of the new default web pages including updates as outlined in the 8.4 [Release Notes](#).













Word Templates

Powered by Atlassian Confluence 5.1.1, Team Collaboration Software · Report a bug · Atlassian News



 css	 include_footer	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 js	 include_head	3/16/2013 3:23 PM	Firefox HTML Doc...	2 KB
 Lending	 include_header	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 AboutLLiad	 include_header_request	3/16/2013 3:23 PM	Firefox HTML Doc...	2 KB
 ArticleRequest	 include_menu	3/16/2013 3:23 PM	Firefox HTML Doc...	3 KB
 Blocked	 include_request_buttons	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 BookChapterRequest	 include_request_cited	3/16/2013 3:23 PM	Firefox HTML Doc...	2 KB
 ChangePassword	 LoanRequest	3/16/2013 3:23 PM	Firefox HTML Doc...	9 KB
 ChangeUserInformation	 Logon	3/16/2013 3:23 PM	Firefox HTML Doc...	3 KB
 ConferencePaperRequest	 Logon2	3/16/2013 3:23 PM	Firefox HTML Doc...	2 KB
 DetailedInformation	 NewAuthRegistration	3/16/2013 3:23 PM	Firefox HTML Doc...	10 KB
 DisavowedUsername	 NewPassword	3/16/2013 3:23 PM	Firefox HTML Doc...	2 KB
 EditAccountInformation	 NewUserRegistration	3/16/2013 3:23 PM	Firefox HTML Doc...	11 KB
 EditArticleRequest	 NLMDDSRequest	3/16/2013 3:23 PM	Firefox HTML Doc...	2 KB
 EditBookChapterRequest	 OtherRequest	3/16/2013 3:23 PM	Firefox HTML Doc...	4 KB
 EditConferencePaperRequest	 PatentRequest	3/16/2013 3:23 PM	Firefox HTML Doc...	6 KB
 EditGenericRequestTesting	 ReportRequest	3/16/2013 3:23 PM	Firefox HTML Doc...	6 KB
 EditLoanRequest	 StandardsDocumentRequest	3/16/2013 3:23 PM	Firefox HTML Doc...	5 KB
 EditOtherRequest	 ThesisRequest	3/16/2013 3:23 PM	Firefox HTML Doc...	6 KB
 EditPatentRequest	 ViewAllRequests	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 EditReportRequest	 ViewDefaultDetailed	3/16/2013 3:23 PM	Firefox HTML Doc...	2 KB
 EditStandardsDocumentRequest	 ViewDetailedInformation	3/16/2013 3:23 PM	Firefox HTML Doc...	2 KB
 EditThesisRequest	 ViewNotifications	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 ElectronicDelivery	 ViewNotificationsDetail	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 ElectronicDeliveryInformation	 ViewOutstandingRequests	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 ElectronicDeliveryUndelete	 ViewRenewCheckedOutDetailedInformat...	3/16/2013 3:23 PM	Firefox HTML Doc...	2 KB
 Error	 ViewRenewCheckedOutItems	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 FAQ	 ViewRequestHistory	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 FirstTime	 ViewResubmitCancelledRequests	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 ForgotPassword	 ViewResubmitDetailedInformation	3/16/2013 3:23 PM	Firefox HTML Doc...	2 KB
 GenericRequestTesting	 ViewSearchResults	3/16/2013 3:23 PM	Firefox HTML Doc...	1 KB
 ILLiadMainMenu				

View Pages

-  [ViewAllRequests](#)
-  [ViewDefaultDetailed](#)
-  [ViewDetailedInformation](#)
-  [ViewNotifications](#)
-  [ViewNotificationsDetail](#)
-  [ViewOutstandingRequests](#)
-  [ViewRenewCheckedOutDetailedInformation](#)
-  [ViewRenewCheckedOutItems](#)
-  [ViewRequestHistory](#)
-  [ViewResubmitCancelledRequests](#)
-  [ViewResubmitDetailedInformation](#)
-  [ViewSearchResults](#)

ILLiad

Choose an option from the choices below.

☒ Active ☐ All

- Logoff genie
- Main Menu
- New Request
 - Photocopy
 - Book
 - Book Chapter
 - Conference Paper
 - Patent
 - Report
 - Thesis
 - Standards Document
 - Other (Free Text)
- View**
 - Outstanding Requests
 - Electronically Received Articles
 - Checked Out Items
 - Cancelled Requests
 - History Requests
 - All Requests
 - Notifications
- Tools
 - Change User Information
 - Change Accounts
 - Change Password
- About ILLiad

Outstanding Requests













Transaction	Type	Title	Author	Status
No Requests				

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Subscribe to Alerts Feed

No Alerts

View Pages

-  [ViewAllRequests](#)
-  [ViewDefaultDetailed](#)
-  [ViewDetailedInformation](#)
-  [ViewNotifications](#)
-  [ViewNotificationsDetail](#)
-  [ViewOutstandingRequests](#)
-  [ViewRenewCheckedOutDetailedInformation](#)
-  [ViewRenewCheckedOutItems](#)
-  [ViewRequestHistory](#)
-  [ViewResubmitCancelledRequests](#)
-  [ViewResubmitDetailedInformation](#)
-  [ViewSearchResults](#)



MILNE Library
 State University of New York at Geneseo

GENESEO
Google Custom Search [Site Search](#)

[Find Books & Media](#)
[Find Articles](#)
[Requests & Services](#)
[Research Help](#)
[About Milne Library](#)

Wed, July 17, 2013
Today's library hours:
8:00am to 9:00pm

IDS Office
Milne 108
585-245-5589
ids@geneseo.edu

Semester Hours
M-Th: 8am-10pm
Fri: 8am-4pm
Sat: Closed
Sun: 2pm-10pm

[View Reference Calendar](#)

IM a Librarian
ONLINE

Support Milne Library

- » Friends of Milne
- » Make a Gift
- » Donate Materials

Connect w/ Milne

- Facebook
- Twitter
- Flickr
- WordPress

Milne Library » Information Delivery Services

Information Delivery Services (IDS)

MAIN MENU

You are signed in as jonesw

- Account Settings
- Recent Account Notifications
- Logout

Place a New Request

Book or Media

- Request to borrow a book or media material.

Journal Article

- Request a copy of an article from a journal or magazine.

Book Chapter

- Request a copy of a book chapter.

ANNOUNCEMENTS

Requesting your textbooks through IDS?

Milne Library has greatly expanded its Textbook Reserve program. This means that a larger number of your textbooks are available at the Service Desk for 4-hour loans, allowing as many students as possible to benefit from this collection.

Although we understand your need to have a textbook for the entire semester, **please note that IDS will not borrow a copy of items on Textbook Reserve from other libraries.** This is due to our agreement with other libraries to not request materials that we already have available.

Please also note the following:

- If you do request a textbook that we have on reserve, we will notify you via email that it is available for use at the Service Desk. It may be helpful to bring this email with you, as it will help the Service Desk staff locate the item.
- The latest edition of textbooks are extremely hard to borrow.** If we don't already own a copy of a recent edition, we will try our best to borrow one for you.
- You are typically unable to borrow textbooks through IDS for an entire semester. **Many libraries only allow 4-6 week loan periods.**
- Please do not mark in borrowed textbooks** (or any books for that matter) or you may be responsible for replacement charges.

How does IDS work?

Place a request wherever you see the blue "Get It" button or by logging into your IDS account.

- If Milne has it, we'll get it and deliver it to you (usually within 1-2 days).
- Otherwise, we'll try to get it from another library or vendor (usually within 3-7 days).

We'll notify you via email when your items arrive, or if we run into any difficulties.

How do I renew my IDS materials?

The easy way: log into your IDS Account and view your checked out items. Then click on the transaction number for the item you need to renew and click the "Renew" link at the top of the page.

View Your Account Activity

Active Requests

- Track the status of your active requests.

Checked Out Items

- View and renew items you have borrowed through IDS.











Received Articles

- Download articles and book chapters that you have received.

Request History

- View all of your IDS requests.

Request Forms

-  ArticleRequest
-  BookChapterRequest
-  ConferencePaperRequest
-  GenericRequestTesting
-  LoanRequest
-  OtherRequest
-  PatentRequest
-  ReportRequest
-  StandardsDocumentRequest
-  ThesisRequest

ILLiad

Choose an option from the choices below.

☒ Active ☐ All

- Logoff genie
- Main Menu
- New Request
 - Photocopy
 - Book
 - Book Chapter
 - Conference Paper
 - Patent
 - Report
 - Thesis
 - Standards Document
 - Other (Free Text)
- View
 - Outstanding Requests
 - Electronically Received Articles
 - Checked Out Items
 - Cancelled Requests
 - History Requests
 - All Requests
 - Notifications
- Tools
 - Change User Information
 - Change Accounts
 - Change Password
- About ILLiad

Outstanding Requests











Transaction	Type	Title	Author	Status
No Requests				

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Subscribe to Alerts Feed

No Alerts











Edit Forms


-  EditArticleRequest
-  EditBookChapterRequest
-  EditConferencePaperRequest
-  EditGenericRequestTesting
-  EditLoanRequest
-  EditOtherRequest
-  EditPatentRequest
-  EditReportRequest
-  EditStandardsDocumentRequest
-  EditThesisRequest

Request Forms

-  [ArticleRequest](#)
-  [BookChapterRequest](#)
-  [ConferencePaperRequest](#)
-  [GenericRequestTesting](#)
-  [LoanRequest](#)
-  [OtherRequest](#)
-  [PatentRequest](#)
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-  [EditThesisRequest](#)


MILNE Library
 State University of New York at Geneseo

GENESEO
 Google™ Custom Search Site Search

[Find Books & Media](#)
[Find Articles](#)
[Requests & Services](#)
[Research Help](#)
[About Milne Library](#)

Milne Library » Information Delivery Services

Wed, July 17, 2013
 Today's library hours:
 8:00am to 9:00pm

IDS Office
 Milne 108
 585-245-5589
ids@geneseo.edu

Semester Hours
 M-Th: 8am-10pm
 Fri: 8am-4pm
 Sat: Closed
 Sun: 2pm-10pm

[View Reference Calendar](#)
IM a Librarian
OFFLINE
 a Librarian Chat is Closed.
 See additional options.

Support Milne Library
 » Friends of Milne
 » Make a Gift
 » Donate Materials

Connect w/ Milne
 Facebook
 Twitter
 Flickr
 WordPress

Information Delivery Services (IDS)

BORROW A BOOK OR MEDIA
 You are signed in as jonesw
 • [Return to Main Menu](#)
 • [Logout](#)

ITEM INFORMATION

* Title:
 Libraries / by Lucia Raatma.

Author:
 Raatma, Lucia.

Publisher:
 Children's Press

Pub. Date:

Edition:

* Format:

ISBN:

Amazon.com Description
 Average Customer Review: ☆☆☆☆
[Go to Amazon](#)

Description:
 Provides a brief look at the history of libraries, some different types of libraries, and the services they provide.



GET IT

From Google Books

 Table of Contents

 Book Preview

From Book Sellers
 Amazon: \$25 (Lowest Affiliate Price: \$1.49)
 Better World Books: \$7.73 (shipping included)

From IDS
 * By when do you need this?

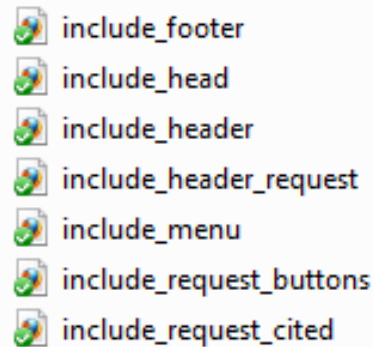
Should Milne purchase or borrow this?
 Borrow

Will you accept...
 Non-English versions?
 Alternate editions?
 Alternate formats?

Comments:

Held by 1 IDS Project Libraries: Estimated delivery by Jul 22, 2013
 SITE USES

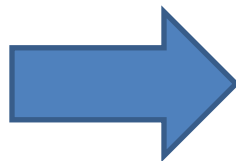
Includes



Includes are replicable elements (sets of code) that save coding time.

You could think of these as analogous to a “class” or “ID” in .css












What if I wanted dropshadow on 1000 pictures? I could just make one class called “.dropshadow” and apply that class to every image, instead of writing the style for each image every time.

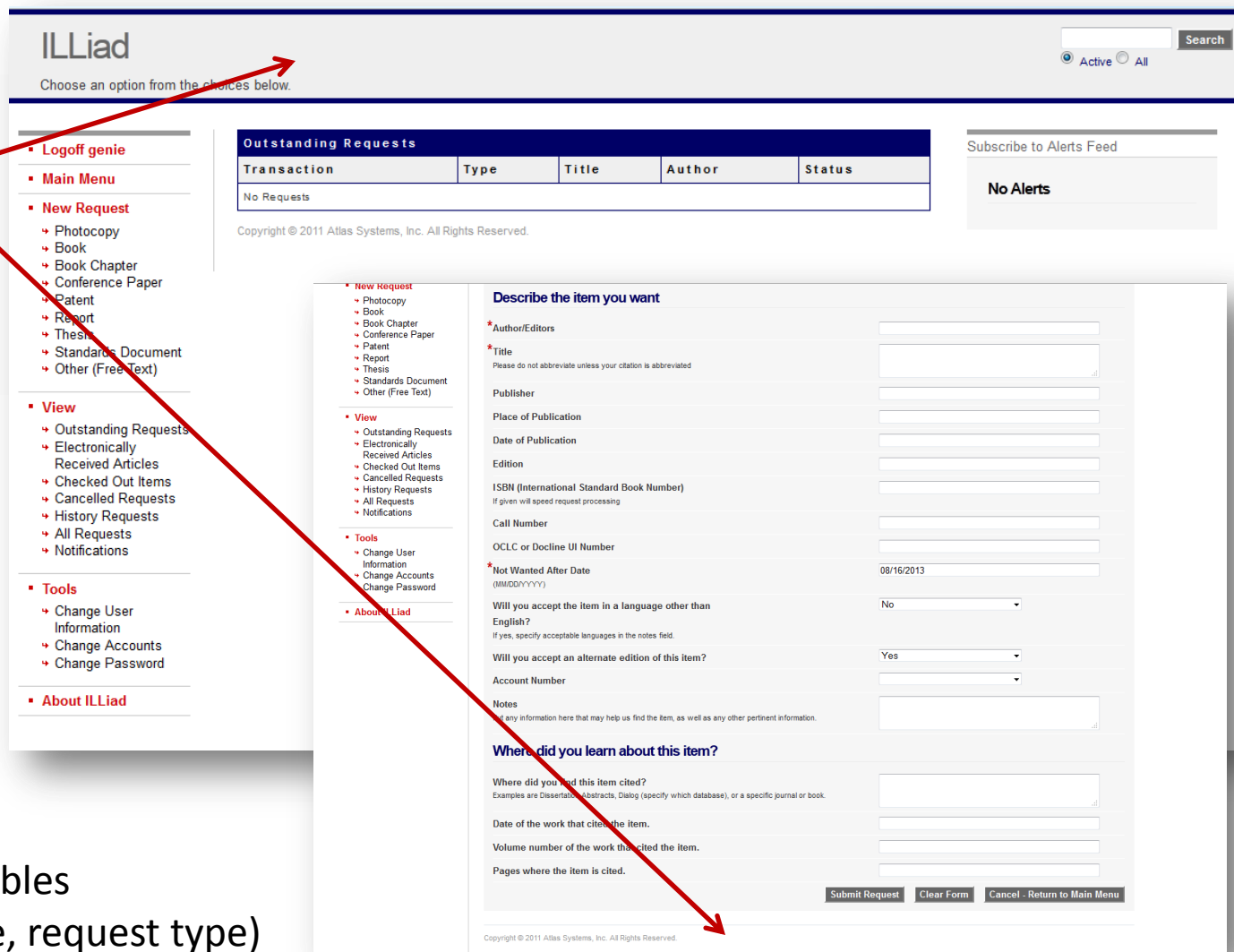
```
1 .dropshadow {  
2   -moz-box-shadow: 3px 3px 4px #000;  
3   -webkit-box-shadow: 3px 3px 4px #000;  
4   box-shadow: 3px 3px 4px #000;  
5   /* For IE 8 */  
6   -ms-filter: "progid:DXImageTransform.Microsoft.Shadow(Strength=4, Direction=135, Color='#000000')";  
7   /* For IE 5.5 - 7 */  
8   filter: progid:DXImageTransform.Microsoft.Shadow(Strength=4, Direction=135, Color='#000000');  
9 }
```


Includes

-  include_footer
-  include_head
-  include_header
-  include_header_request
-  include_menu
-  include_request_buttons
-  include_request_cited

Elements that would normally exist within the <head> tag

Hidden code for variables (status, user, doc type, request type)



ILLiad

Choose an option from the choices below.

- Logoff genie
- Main Menu
- New Request
 - Photocopy
 - Book
 - Book Chapter
 - Conference Paper
 - Patent
 - Report
 - Thesis
 - Standards Document
 - Other (Free Text)
- View
 - Outstanding Requests
 - Electronically Received Articles
 - Checked Out Items
 - Cancelled Requests
 - History Requests
 - All Requests
 - Notifications
- Tools
 - Change User Information
 - Change Accounts
 - Change Password
- About ILLiad

Outstanding Requests

Transaction	Type	Title	Author	Status
No Requests				

Copyright © 2011 Atlas Systems, Inc. All Rights Reserved.

Describe the item you want

* Author/Editors

* Title
Please do not abbreviate unless your citation is abbreviated

Publisher

Place of Publication

Date of Publication

Edition

ISBN (International Standard Book Number)
If given will speed request processing

Call Number

OCLC or Docline UI Number

* Not Wanted After Date
(MMDD/YYYY)

08/16/2013

Will you accept the item in a language other than English?
If yes, specify acceptable languages in the notes field.

Will you accept an alternate edition of this item?

Account Number

Notes
Add any information here that may help us find the item, as well as any other pertinent information.

Where did you learn about this item?

Where did you find this item cited?
Examples are Dissertation Abstracts, Dialog (specify which database), or a specific journal or book.

Date of the work that cited the item.








Volume number of the work that cited the item.

Pages where the item is cited.

Submit Request Clear Form Cancel - Return to Main Menu

Copyright © 2011 Atlas Systems, Inc. All Rights Reserved.

Includes

-  include_footer
-  include_head
-  include_header
-  include_header_request
-  include_menu
-  include_request_buttons
-  include_request_cited

ILLiad

Choose an option from the choices below.

Logoff genie

Main Menu

New Request

- Photocopy
- Book
- Book Chapter
- Conference Paper
- Patent
- Report
- Thesis
- Standards Document
- Other (Free Text)

View

- Outstanding Requests
- Electronically Received Articles
- Checked Out Items
- Cancelled Requests
- History Requests
- All Requests
- Notifications

Tools

- Change User Information
- Change Accounts
- Change Password

About ILLiad

Outstanding Requests

Transaction	Type	Title	Author	Status
No Requests				

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Subscribe to Alerts Feed

No Alerts

new request

- Photocopy
- Book
- Book Chapter
- Conference Paper
- Patent
- Report
- Thesis
- Standards Document
- Other (Free Text)

View

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Yes

Account Number

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Date of the work that cited the item.

Volume number of the work that cited the item.

Pages where the item is cited.

Submit Request

Clear Form

Cancel - Return to Main Menu

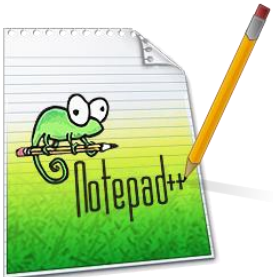
Copyright © 2011 Atlas Systems, Inc. All Rights Reserved.

ILLiad .dll

Turns <#Command> into real text



How Can I Edit These Files?



Resources: W3C Schools,
Stackoverflow, Codeproject

ENTER: LOGAN RATH!

Where are the files located?

- Directly in the ILLiad folder (inet pub)

You can ...

- Use the same include for Article request faculty and Article request student
- Create a Form includes folder
- Status will work with includes the same way that they work with webpages
- You can take them to the web person in your library to make these changes

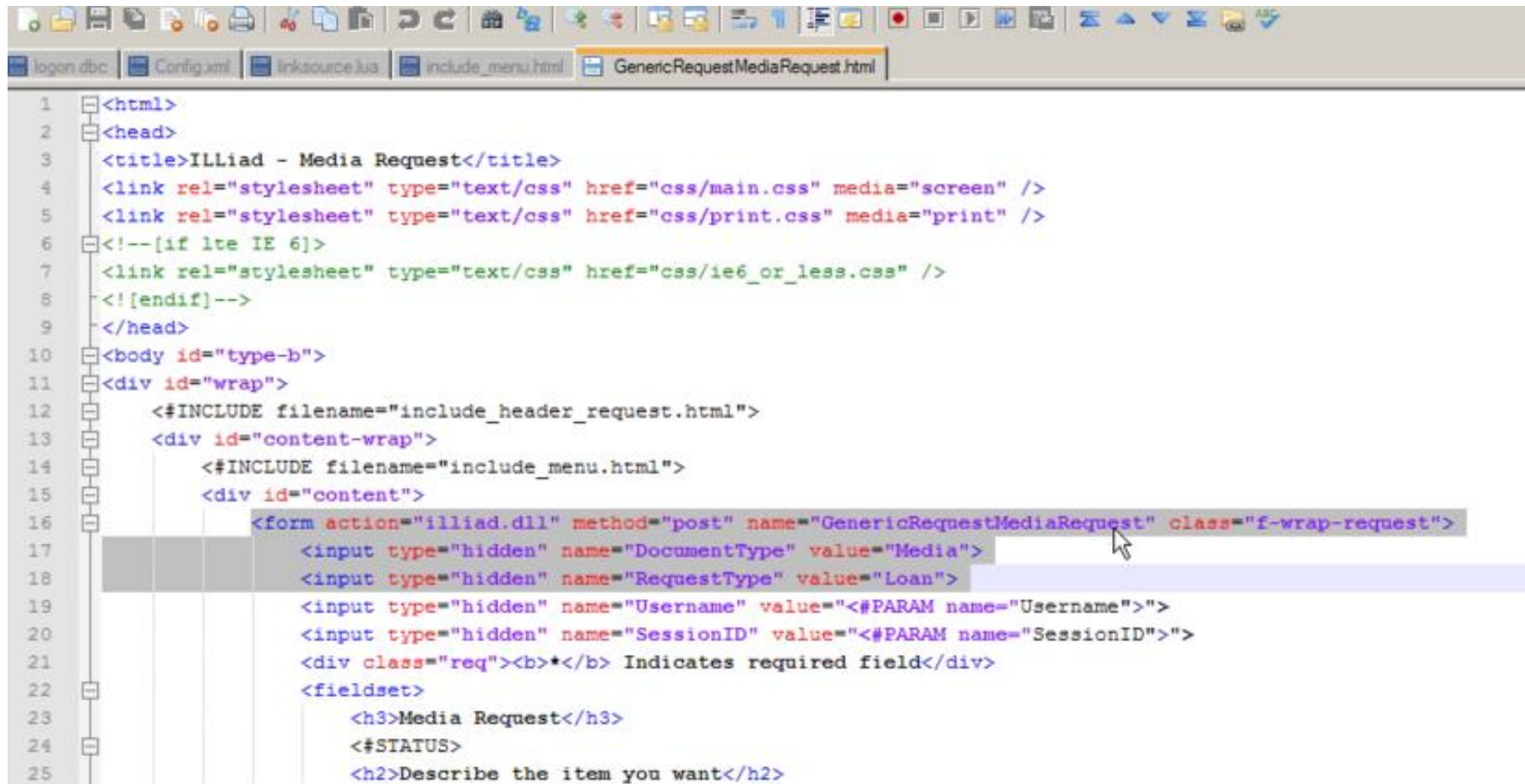
Creating new files on the server:
Using the name conventions

GenericRequestMediaRequest
EditGenericRequestMediaRequest

You need to have both the
Request and Edit for the Request!



Change Form name, change DocumentType and RequestType



```
1 <html>
2 <head>
3   <title>ILLiad - Media Request</title>
4   <link rel="stylesheet" type="text/css" href="css/main.css" media="screen" />
5   <link rel="stylesheet" type="text/css" href="css/print.css" media="print" />
6   <!--[if lte IE 6]>
7     <link rel="stylesheet" type="text/css" href="css/ie6_or_less.css" />
8   <![endif]-->
9 </head>
10 <body id="type-b">
11   <div id="wrap">
12     <#INCLUDE filename="include_header_request.html">
13     <div id="content-wrap">
14       <#INCLUDE filename="include_menu.html">
15       <div id="content">
16         <form action="illiad.dll" method="post" name="GenericRequestMediaRequest" class="f-wrap-request">
17           <input type="hidden" name="DocumentType" value="Media">
18           <input type="hidden" name="RequestType" value="Loan">
19           <input type="hidden" name="Username" value="#PARAM name="Username">
20           <input type="hidden" name="SessionID" value="#PARAM name="SessionID">
21           <div class="req"><b>*</b> Indicates required field</div>
22           <fieldset>
23             <h3>Media Request</h3>
24             <#STATUS>
25             <h2>Describe the item you want</h2>
```


You need to specify in the CM that movie title is a required field

Web Validation Table

Regular expression match

Web Interface

Formname: GenericRequestMedia

Fieldname: LoanTitle

Validation: .+

Error: Please enter movie title

ErrorTag: ERRORLoanTitle

Edit Row	
NVTGC	ILL
Formname	EditThesisRequest
Fieldname	NotWantedAfter
Validation	[^\d\d\d\d\d\d\d\d]
Error	Not Wanted After is a required field.
ErrorTag	ERRORNotWantedAfter

Values for ErrorTag needs to match Fieldname

The beginning of the field will be different LoanTitle vs. ERRORLoanTitle

.+ means that it needs to be filled out

Things with dates, \d is digit, brace is length

ie	^\d
+	.+
WantedAfter	^\d{4,5}\$^\d{5,5})-(\d{4,4})\$
oJournalTitle	[^\d\d\d\d\d\d\d\d]
ess	.+

No Radio Buttons!

No Check Boxes!

If you need more in-depth information, go to:

“Flex Your ILLiad Muscles: Maximizing the Strength of Your Online Web Presence”

(L. Rath, K. Keegan) Thurs. 10:30am – 11:20am



- **Testweb** – for the development sandbox
- **Atlas Training videos** – find these through the ILLiad
- **IDS Mentors** have access to those training videos



OpenURL Mapping

1. What is it?
2. Where is it?
3. Fields
4. Why do you need it?

OpenURL Mapping: What is it?

OpenURL tells ILLiad what information to import into the Web Request form from a database.

https://brockport.illiad.oclc.org/illiad/illiad.dll?Action=10&Form=30&sid=EBSCO%3APsycINFO&genre=article&artnum=&title=Perceptions+of+high+school+library+media+specialists
http://uh4jnted5mar.yeah.net/searchochicel%20n/P/rges+R.&article&ssn=&ist=&04194-217&title
1D&seriation=&abstracts+Internat%20nB18&Volume=53&issu&date=1992-11-
A&&Photo19921110In&usivePages=&pages&coveritor&imfidb=&predat&st&sbwa&ss
nt&04194-217&iss&h=&24194-207&iss&re=Phyllis+R.&spage=&sid=EBSCO:PsycINFO&pid=
a&number=&part=&place=&pmid=&pub=&quarter=&sici=&PhotoJournalInclusivePages=-
&ssn=&title=Dissertation+Abstracts+International&volume=53

OpenURL Mapping: Where is it?

Web Interface | OpenURL | OpenURL Mapping

OpenURLMapping							
Id	NVTGC	URL_Ver	rft_id	ILLiadAction	ILLiadFieldName	OpenURLFieldValues	ILLiadValue
19	ILL	Default	Default	Replace	PhotoJournalVolume	<#rft.volume> <#volume>	
20	ILL	Default	Default	Replace	PhotoJournalYear	<#rft.date> <#date>	DATE yyyy
21	ILL	Default	Default	Substitute:genre	RequestType	article	Article:Article:ArticleRequest.html
22	ILL	Default	Default	Substitute:genre	RequestType	book	Loan:Book:LoanRequest.html
23	ILL	Default	Default	Substitute:genre	RequestType	bookitem	Article:Book Chapter:BookChapterRequest.html
24	ILL	Default	Default	Substitute:genre	RequestType	conference	Article:Conference:ConferencePaperRequest.html
25	ILL	Default	Default	Substitute:genre	RequestType	default	Loan:Book:LoanRequest.html
26	ILL	Default	Default	Substitute:genre	RequestType	dissertation	Loan:Loan:ThesisRequest.html
27	ILL	Default	Default	Substitute:genre	RequestType	journal	Loan:Book:LoanRequest.html
28	ILL	Default	Default	Substitute:genre	RequestType	preprint	Article:Article:ArticleRequest.html
29	ILL	Default	Default	Substitute:genre	RequestType	proceeding	Article:Conference:ConferencePaperRequest.html
30	ILL	Default	Default	Substitute:genre	RequestType	reservesarticle	Article:Article:GenericRequestReservesArticle.html
31	ILL	Default	Default	Substitute:genre	RequestType	reserveschapter	Article:Article:GenericRequestReservesChapter.html
32	ILL	Default	Default	Substitute:genre	RequestType	reservesloan	Article:Article:GenericRequestReservesLoan.html
33	ILL	Default	Default	Substitute:genre	RequestType	unknown	Article:Article:ArticleRequest.html
34	ILL	Default	Default	Substitute:rft.genre	RequestType	article	Article:Article:ArticleRequest.html
35	ILL	Default	Default	Substitute:rft.genre	RequestType	book	Loan:Book:LoanRequest.html
36	ILL	Default	Default	Substitute:rft.genre	RequestType	bookitem	Article:Book Chapter:BookChapterRequest.html
37	ILL	Default	Default	Substitute:rft.genre	RequestType	conference	Article:Conference:ConferencePaperRequest.html
38	ILL	Default	Default	Substitute:rft.genre	RequestType	default	Loan:Book:LoanRequest.html
39	ILL	Default	Default	Substitute:rft.genre	RequestType	journal	Loan:Book:LoanRequest.html
40	ILL	Default	Default	Substitute:rft.genre	RequestType	preprint	Article:Article:ArticleRequest.html
41	ILL	Default	Default	Substitute:rft.genre	RequestType	proceeding	Article:Conference:ConferencePaperRequest.html
42	ILL	Default	Default	Substitute:rft.genre	RequestType	unknown	Loan:Book:LoanRequest.html



OpenURL Mapping: Where is it?

Entries for Custom Request Types

OpenURLMapping							
Id	NVTGC	URL_Ver	rft_id	ILLiadAction	ILLiadFieldName	OpenURLFieldValues	ILLiadValue
19	ILL	Default	Default	Replace	PhotoJournalVolume	<#rft.volume> <#volume>	
20	ILL	Default	Default	Replace	PhotoJournalYear	<#rft.date> <#date>	DATE yyyy
21	ILL	Default	Default	Substitute:genre	RequestType	article	Article:Article:ArticleRequest.html
22	ILL	Default	Default	Substitute:genre	RequestType	book	Loan:Book:LoanRequest.html
23	ILL	Default	Default	Substitute:genre	RequestType	bookitem	Article:Book Chapter:BookChapterRequest.html
24	ILL	Default	Default	Substitute:genre	RequestType	conference	Article:Conference:ConferencePaperRequest.html
25	ILL	Default	Default	Substitute:genre	RequestType	default	Loan:Book:LoanRequest.html
26	ILL	Default	Default	Substitute:genre	RequestType	dissertation	Loan:Loan:ThesisRequest.html
27	ILL	Default	Default	Substitute:genre	RequestType	journal	Loan:Book:LoanRequest.html
28	ILL	Default	Default	Substitute:genre	RequestType	preprint	Article:Article:ArticleRequest.html
29	ILL	Default	Default	Substitute:genre	RequestType	proceeding	Article:Conference:ConferencePaperRequest.html
30	ILL	Default	Default	Substitute:genre	RequestType	reservesarticle	Article:Article:GenericRequestReservesArticle.html
31	ILL	Default	Default	Substitute:genre	RequestType	reserveschapter	Article:Article:GenericRequestReservesChapter.html
32	ILL	Default	Default	Substitute:genre	RequestType	reservesloan	Article:Article:GenericRequestReservesLoan.html
33	ILL	Default	Default	Substitute:genre	RequestType	unknown	Article:Article:ArticleRequest.html
34	ILL	Default	Default	Substitute:rft.genre	RequestType	article	Article:Article:ArticleRequest.html
35	ILL	Default	Default	Substitute:rft.genre	RequestType	book	Loan:Book:LoanRequest.html
36	ILL	Default	Default	Substitute:rft.genre	RequestType	bookitem	Article:Book Chapter:BookChapterRequest.html
37	ILL	Default	Default	Substitute:rft.genre	RequestType	conference	Article:Conference:ConferencePaperRequest.html
38	ILL	Default	Default	Substitute:rft.genre	RequestType	default	Loan:Book:LoanRequest.html
39	ILL	Default	Default	Substitute:rft.genre	RequestType	journal	Loan:Book:LoanRequest.html
40	ILL	Default	Default	Substitute:rft.genre	RequestType	preprint	Article:Article:ArticleRequest.html
41	ILL	Default	Default	Substitute:rft.genre	RequestType	proceeding	Article:Conference:ConferencePaperRequest.html
42	ILL	Default	Default	Substitute:rft.genre	RequestType	unknown	Loan:Book:LoanRequest.html



OpenURL Mapping: Fields

This table translates a URL string into values that ILLiad can understand (<#PARAM>).

OpenURLFieldValues
proceeding
unknown
<#rft_id> <#sid>
<#rft_dat>
<#rft.isbn> <#rft.issn> <#r...
<#rft.au> <#rft.aulast>, <#...
<#rft.date> <#date>
<#rft.edition>
<#rft.place>
<#rft.pub>
<#rft.btitle> <#rft.title> <#...
<#rft.au> <#rft.aulast>, <#...
<#rft.atitle> <#atitle>
<#rft.au> <#rft.aulast>, <#...
<#rft.edition>
<#rft.place>
<#rft.pub>
<#rft.pages> <#rft.page>-...
<#rft.issue> <#issue>
<#rft.jtitle> <#rft.title> <#ti...
<#rft.volume> <#volume>
<#rft.date> <#date>

rft_val_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Abook

rft.genre=book

rfr_id=info:sid/idsproject.org:library

pid=MARC_001%3DBRO01-

000060325%26MARC_035%3D496078%26OCLC_NUMBER%3D28798175

rft.au=Mincy%2C+Ronald+B.

rft.isbn=0877665982

rft.title=Nurturing+young+Black+males+%3A+challenges+to+agencies%2C+progr
ams%2C+and+social+policy+%2F+Ronald+B.+Mincy%2C+editor.

rft.date=c1994.

rft.pub=Urban+Institute+Press+%3B

ESPNumber=28798175



Troubleshooting an OpenURL problem

- Find a [decoder](#) (I like the one on meyerweb.com)
- Use a text program to split out the pieces of OpenURL and examine them.
- Check ALL the OpenURL links.

What's going on?	Who you going to call?
Wrong OpenURL string going to link resolver	Database customer support
Wrong OpenURL string into ILLiad	Link Resolver support
Wrong ILLiad page being loaded (w/ good link)?	ILLiad support (OCLC)
Something weird and it don't look good?	Ghostbusters!



Questions?

- Any issues you'd like help with?
- Want to know if something's possible?
- Have a crazy idea that just might work?

