

Resource Sharing Workflows for Lockers

Presented by:
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- Identifying CSU+ items destined for lockers and other locations.
 - If different libraries/circ desks were configured in order to offer different pickup locations, the pickup location will display when the CSU+ request is received in 'Receiving Items'.

Received Items

Identifier type Barcode External identifier



Received format Physical Digital Physical non-returnable

Automatically notify patron

Internal note

Note to partner

Barcode

[Clear List](#)  

Activated	Title	Destination	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In
<input checked="" type="checkbox"/>	Handbook of research on digital media and advertising : user generated content consumption /	University Library Lockers	Borrowing Request	<input type="text"/>	000555669	1	<input type="button" value="..."/>

Using SpineSlips

At some libraries new locations for loans have become necessary in response to covid-19.

Locations:

- Hold Shelf
- Lockers
- Roadside pickup
- Home Delivery



ILLiad – Overview

- Identifying ILLiad items destined for lockers and other locations.
 - Edit ILL request form
 - Edit loan labels (straps or stickers)
- ILL notifications
- ILLiad and Luxer Lockers

Not Wanted After Date

*

(The date after which you no longer want us to ship the item to you.)

Will you accept the item in a language other than English?

If yes, specify acceptable languages in the notes field.

If digital access is unavailable, what is your preferred delivery method?

*

If you selected home delivery, please provide your mailing address.

Street/Apt Address:

We cannot deliver to P.O. Boxes.

City, State Zip:

The ILL Book Request Form

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<label for="AcceptNonEnglish">
  <span class="field">
    <span class="valid"><b>Will you accept the item in a language other than English?</b></span><br />
    <span class="note">If yes, specify acceptable languages in the notes field.</span>
  </span>
  <select id="AcceptNonEnglish" name="AcceptNonEnglish" size="1" class="f-name" tabindex="11">
    <option selected="selected">
      No
    </option>
    <option>No</option>
    <option>Yes</option>
  </select>
<br />
</label>
<label for="ItemInfo1">
  <span class="field">
    <span class="req">*</span><span class="valid" tabindex="11"><b>If digital access is unavailable, what is your preferred delivery method?</b></span><br />
  </span>
  <select id="ItemInfo1" name="ItemInfo1" size="1" class="f-name">
    <option selected>Home Delivery</option>
    <option>Locker Pickup</option>
  </select>
<br />
</label>
<label for="ItemInfo2">
  <span class="field">
    <span class="valid" tabindex="12"><b>If you selected home delivery, please provide your mailing address.</b></span><br><br><div class="alert alert-info" style="font-size:14px;co
  </span>

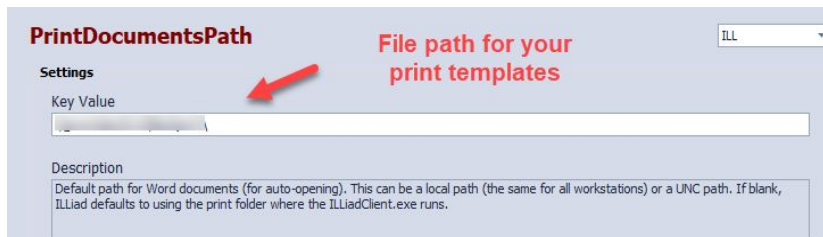
  <div class="pull-left">
  <div style="margin: 0 0 10px 10px">Street/Apt Address:</div>
  <input id="ItemInfo2" name="ItemInfo2" size="40" type="text" class="f-name">
  <br/><br/>
  <div style="margin: 0 0 10px 10px">City, State Zip:</div> <input id="ItemInfo3" name="ItemInfo3" size="40" type="text" class="f-name">
  </div>
<br />

```

Editing the ILL Request Form

ILLiad – Loan Labels

1. Find out where your print templates are stored (this is where you'll want to save your new template).
 - a. Open the Customization Manager
 - b. System → General → PrintDocumentsPath



2. Modify your book straps/stickers (BorrowingLoanLabels) to include delivery method selected by user.
 - a. Open the Word Doc for the template
 - b. A pop up appears - select no
 - c. Mailings → Select Recipients → Use an Existing List → Documents → ILLiad → Print → select 'Loan' → PrintQueue\$ or LegacyQueue\$
 - d. To enter new fields: Mailings → Insert Merge Field
 - e. Edit text as needed.
 - f. Save



UNIVERSITY LIBRARY

Library - Resource Sharing
Interlibrary Loan

Office Hours: Monday - Friday, 8am - 5pm
Email: ill@csusm.edu

«Users_LastName», «Users_FirstName»

Due Date: «Transactions_DueDate»

Pieces: «Transactions_Pieces»

Special Restrictions:

Delivery Method: «Transactions_ItemInfo1»



TN: «Transactions_TransactionNumber»

Author: «Transactions_LoanAuthor»

Title: «Transactions_LoanTitle»

To request a renewal, visit
<https://illiad.csusm.edu>

This material was loaned to you courtesy of:
«Transactions_LendingLibrary»

Please do not remove this book strap!!

«Next Record»



UNIVERSITY LIBRARY

Library - Resource Sharing
Interlibrary Loan

Office Hours: Monday - Friday, 8am - 5pm
Email: ill@csusm.edu

Magazino, Natalya

Due Date: 11/27/2020

Pieces: 1

Special Restrictions:

Delivery Method: Locker Pickup



TN: 252904

Author: Stewart, James Michael, author.

Title: CISSP : certified information systems security
professional study guide /

To request a renewal, visit
<https://illiad.csusm.edu>

This material was loaned to you courtesy of: ECC

Please do not remove this book strap!!

ILLiad Notifications

If you use ILLiad notifications, you will want to do one of the following:

- Revise 'Contact Customers' notification, making it more general.
- Use email routing to notify based on delivery method.
- If you have IDS, have them configure for you.
 - IDS can configure different notifications to send based on queues and values in item info fields.

Notification Templates - ILLiad Customization Manager (nserge)

Home Notification Templates

New Edit Copy Save Delete Cancel

Templates Editing

Customization Z39.50 Notification Templates Server Addons DSP Business Rules

Template Details

Name ILL Borrowing Loan Pickup NVTGC ILL

Description The notification e-mail text used for loans available for customer pickup.

E-mail SMS

From Name From Address

To Name To Address

CC Address BCC Address

Subject Requested loan has arrived

Dear <#User.FirstName> <#User.LastName>

A loan that you had requested:

Title: <#Transaction.LoanTitle>
Author: <#Transaction.LoanAuthor>
TN: <#Transaction.TransactionNumber>

has been received and processed by Interlibrary Loan Staff.

You selected <#Transaction.ItemInfo1> as your preferred delivery method.

If you selected Locker Pickup, you will receive instructions shortly in regard to how to pick up your request.

If you selected Home Delivery, the request is in transit to your address. If you do not receive your request within 10 days, please let us know.

This item is due back to the library by: <#Transaction.DueDate>.

Thank you for using Interlibrary Loan.
Questions may be directed to <#LocalInfo.GeneralEmailAddress>

1. Create a new notification template in ILLiad customization manager for each email routing rule you wish to create.
2. In the Customization Manager, go to System → Email → Email Routing.
3. Click 'New Record'.
4. Enter the following:
 - a. Process Type: Borrowing
 - b. Name:
 - c. DefaultStatus: Checked Out to Customer
 - d. LoanTemplate: name of the the notification template you created

<https://support.atlas-sys.com/hc/en-us/articles/360011808034-Email-Routing>

Edit Row	
ProcessType	Borrowing
Name	ILL Locker Delivery
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	ILL Locker Delivery
DefaultFromAddress	ill@csusm.edu
DefaultFromName	ILL Department
DefaultStatus	Checked Out to Customer
LoanTemplate	ILL Locker Delivery
ArticleTemplate	
NVTGC	ILL

243469 - Borrowing Request

The screenshot shows the ILLiad interface for a borrowing request (ID: 243469). A 'Send Notification' dropdown menu is open, displaying a list of notification templates. The 'ILL Locker Delivery' option is highlighted in yellow. Other options in the menu include Address Confirmation, Borrowing Overdue 3, CSU+ to ILLiad, ILL Borrowing Mail, Loan Recall, Received After Not Wanted By, and Request Digital Purchase. The background interface includes navigation tabs (Policies Directory, Billing, View), a 'Send Notification' button, and a right-hand panel with OCLC information (ILL Number, OCLC Number, Lending String, Lender, Item ID).

Luxer Lockers

- Users are uploaded into the Luxer system when requests are placed in Alma.
 - Unless you have Alma and ILLiad integrated via NCIP, users will have to be entered manually.
- If you have ILLiad and Alma integrated via NCIP and use Alma letters instead of ILLiad notifications, you will have to edit Alma letters instead. You can use if/then logic to configure different versions letters to go out.



Thank You!

If you have questions:

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