

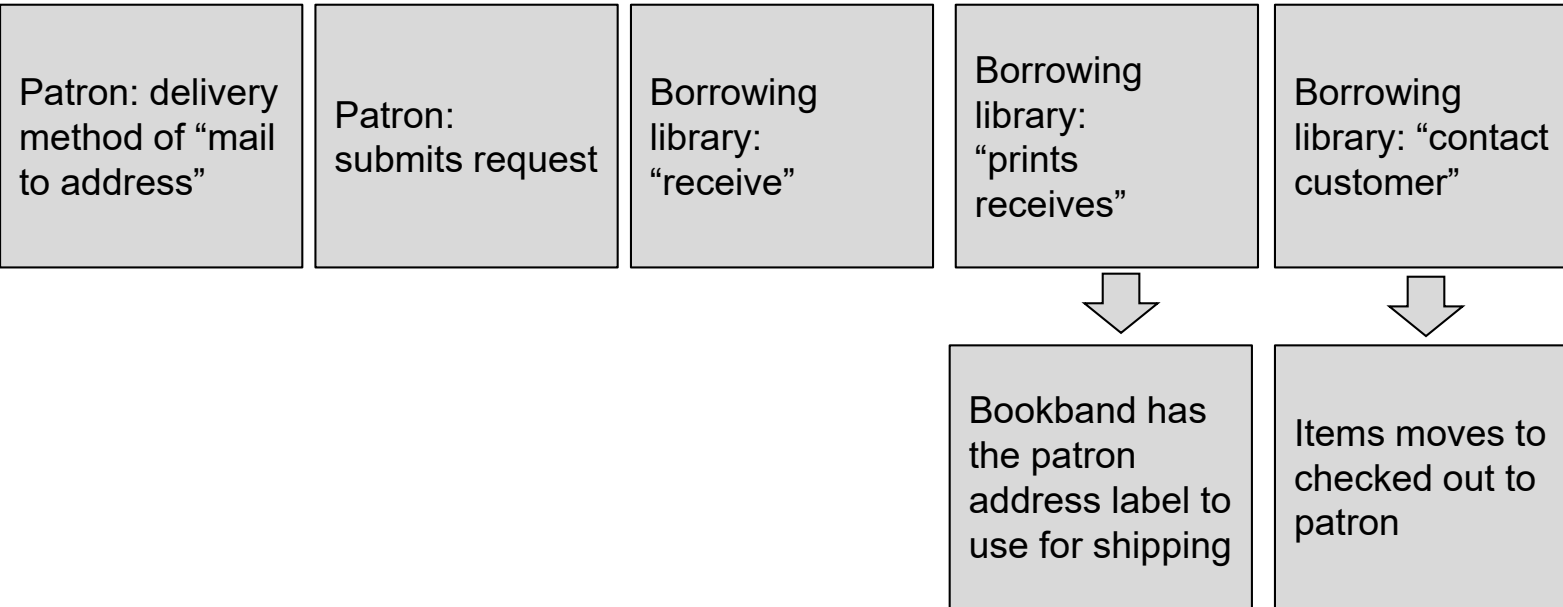
Preparing for Fall 2020: ILLiad Mail to Address

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Lifecycle:using mail to address workflow

Heather Black from Atlas did a video on ILLiad's mail to address functionality:

<https://training.atlas-sys.com/Course/Details/4340>



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ILLiad 9.1???

FAQ from Atlas: <https://support.atlas-sys.com/hc/en-us/articles/360035069534-ILLiad-9-1-FAQ>

Release notes: <https://support.atlas-sys.com/hc/en-us/articles/360034431633-ILLiad-9-1-Release-Notes>

My review: 9.1 update went smoothly

Why did I update to ILLiad 9.1???

ILLiad 9.1 has new webpages....

They're responsive and better for your users!

Also I don't want to edit my pages in 8.whatever and have to redo it again...

Why did I update to ILLiad 9.1?

To complete step 6 on my checklist, expiring user records is a new feature

Expire to collect updated information when the user logs in for the first time after the expiration goes through

[More on expire users from Atlas](#) and in summary:

1. make your configs match slide 16 (or 17) from Heather's presentation. The configs of slide 17 lead to more work for staff long term
2. Make sure your changeuserinformation.html has all the fields you want to collect

Who is already using ILLiad 9.1?

Who gets to join us on ILLiad 9.1?

Mildly okay alternative to 9.1...

web alert: ask folks to update their user info, and embed web alert on all webpages not just main menu

Humboldt State University Interlibrary Loan

Choose an option from the choices below.

 Active All

Logoff mab1044

Main Menu

New Request

- Article
- Book
- Book Chapter
- CD
- Conference Paper
- DVD
- Musical Score
- Thesis

View

- Articles (PDF)
- Checked Out / Renew Items
- All Requests
- Notifications

Tools

- Change User Information

About HSU Interlibrary Loan

Active Requests

Transaction	Type	Title	Author	Status
No Requests				

Checked Out Items

Transaction Number	Document Type	Title	Author	Due Date	Status
No Items					

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[Subscribe to Alerts Feed](#)

COVID-19 and ILL

Web alerts show up here on the main menu by default.

To make alert:
Client/system/web alerts and just type the message.

Web Alerts

Web Alerts

Clear Users

WorldCat Search

OCLC Resource Sharing Settings

Search/Review Statuses

Policies Directory

Resource Sharing Settings

Web Logon

Web Reports

Web Alerts

Event Log

Groups Maintenance

Manage Addons

Drag a column header here to group by that column

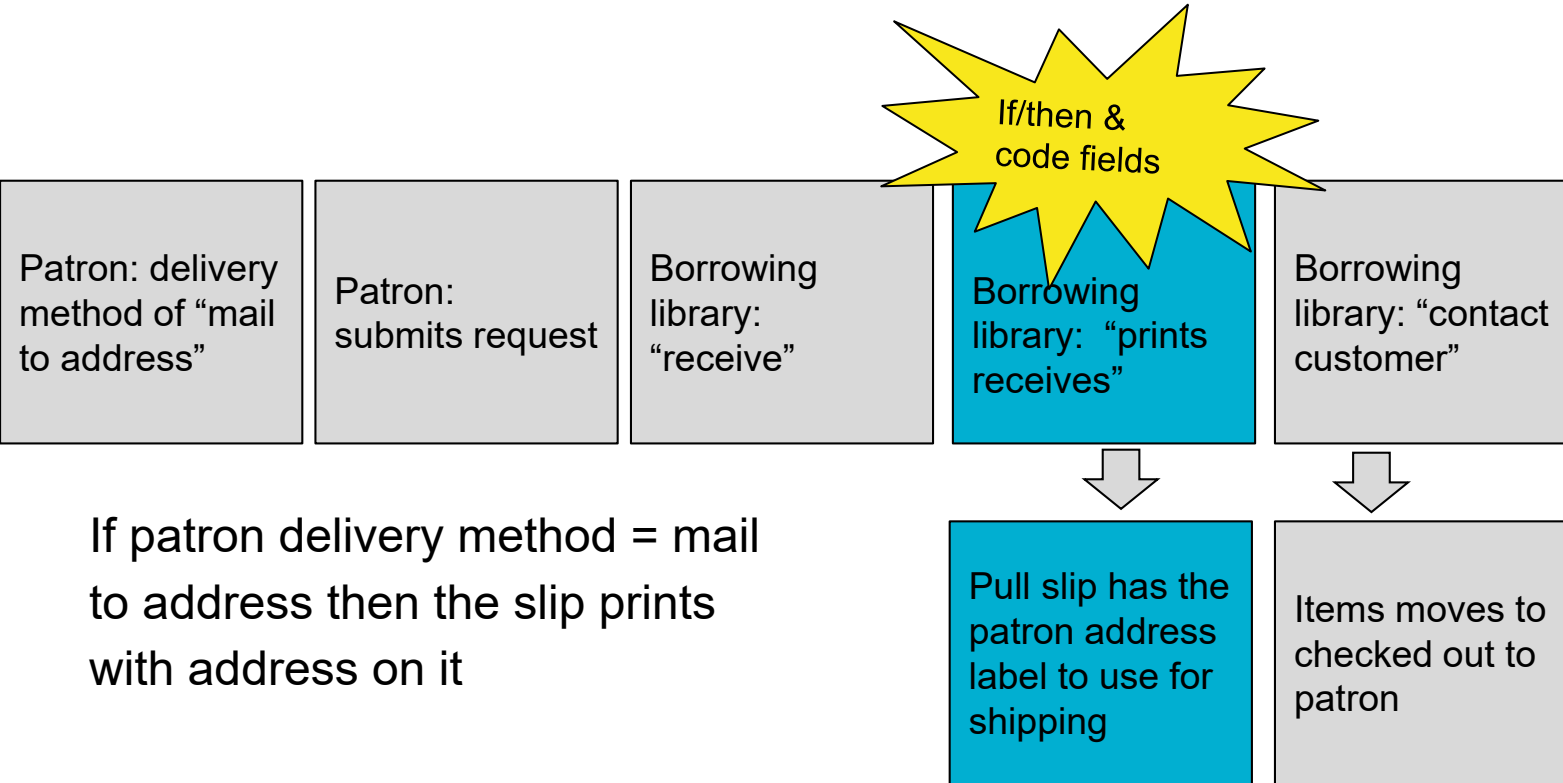
Type	Identifier	Title	Created	Active Date	Expiration Date	Added By
System	Borrowing	COVID-19 and ILL	7/14/2020	7/14/2020	9/1/2020	meghann

<https://support.atlas-sys.com/hc/en-us/articles/360011808754-Creating-Web-Alerts>

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ILLiad Borrowing Slips

edit to have shipping label for mail to address patrons

[Watch this quick video where I make slips work at Humboldt](#)

In video you see: select no to SQL, Making all field codes visible, connect the right datasource, select the correct format of data source

Learning moment : if after merge data source you get a pop up to change fields.. Then selected wrong datasource format. After you hit merge with exist you'll have the option to select legacy queue or print queue if your fields have underscores in them select the print queue if you fields don't have underscores select the legacy queue.

Learning moment: staff testing pull slips edit will need to have "printed" a pullslip on their computer to test that these values merge with their template. "Reprint" from ILLiad's print session history and then you'll have a slip for it to pull real data from.

Atlas on pullslips template: <https://support.atlas-sys.com/hc/en-us/articles/360044611673How-to-edit-an-ILLiad-print-template>

<https://support.atlas-sys.com/hc/en-us/articles/360011807874-Hidden-Field-Codes>

ILLiad Borrowing Loan slips: succe

[Use this template or the parts that you like](#)

or find it and more at:

<https://idsproject.libanswers.com/faq/142532>

Mail to:

Meghann Weldon
1235 Hoover Street
Eureka, CA 95501



DUE DATE:

TN: 232993

Title: This is a test. to make sure requests are still going through post update.

Author: Kathy Corridan

Customer: Weldon, Meghann

Username: mab1044

Email: meghann@humboldt.edu

Please Return to:

Humboldt State University

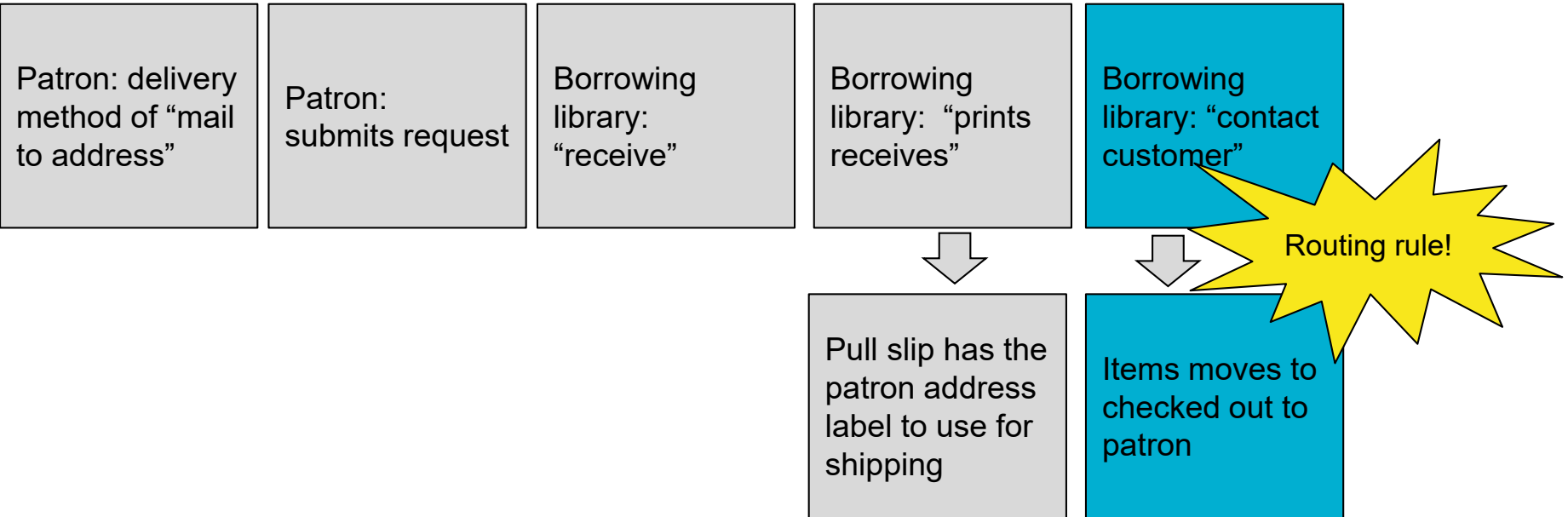
1 Harpst Street

Arcata, CA 95521

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ILLiad Mail to Routing Rule

You can copy the routing rule from Heather Black's presentation, it is the same rule I used... step 3 is that easy.

RuleNo	251
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Customer Notified via E-Mail
MatchString	u.LoanDeliveryMethod = 'Mail to Address'
NewProcessType	Borrowing
NewTransactionStatus	Checked Out to Customer
RuleDescription	Home delivery check out after email is sent

Yes it's that easy

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Website changes

Need a way to connect to server they're on (WinSCP) + username and password

Get the new pages in the folder on your server from Atlas or OCLC

Good practice: edit the templates in the test web folder, before you bring the edited template to “live ILLiad” make a copy of the form you are replacing and save the unedited as a backup somewhere.

To view your edits to the test form you go to your regular ILLiad site and then insert testweb to have it route to that page in the testweb folder vs your live folder.

Example:

<https://humboldt-illiad-oclc-org.ezproxy.humboldt.edu/illiad/illiad.dll>

<https://humboldt-illiad-oclc-org.ezproxy.humboldt.edu/illiad/testweb/illiad.dll>

Unhide: mail to address

Under preferred loan delivery method on changeuserinformation.html and newuserregistration.html

```
<section name="delivery-method-info" >
  <h3>Delivery Methods</h3>

  <div class="form-group col-md-5">
    <label for="LoanDeliveryGroup">
      <span class="field">
        <span class="#ERROR name='ERRORLoanDeliveryGroup'">
          Preferred Loan Delivery Method
        </span>
      </span>
    </span>
    <select id="LoanDeliveryGroup" name="LoanDeliveryGroup" size="1" class="custom-select mr-sm-2">
      <option selected><#PARAM name='LoanDeliveryGroup'></option>
      <option>Mail to Address</option>
    </select>
    <br>
  </label>
</div>
```


What if I want to make it so mail to is my only option for new users?

The easiest way to change the WebDefaultLoanDeliveryGroup in the customization manager:
Mail to Address

The screenshot shows the customization manager interface. The search bar contains 'Delivery'. The left sidebar lists various customization items, with 'WebDefaultLoanDeliveryGroup' selected. The main panel displays the settings for 'WebDefaultLoanDeliveryGroup'. The 'Settings' section has a 'Key Value' field set to 'Hold for Pickup' and a 'Description' field. A blue arrow points to the 'Key Value' field with the text 'Current default'. Below the settings is a table with columns 'Value Changed From', 'Value Changed To', and 'NVTGC'.

This change impacts options on webpages under delivery method options for my users

The screenshot shows a dropdown menu titled 'Delivery Methods'. The selected option is 'Mail to Address'. Other visible options include 'Yes'.

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Patron notification message

Customization manager/notifications/edit/ILL
Borrowing Loan Delivery

Check that the default letter they'll get as a mail to address patron works for you and includes everything you want it to.

Read through the template and make any changes that you want...

The very last line tells the user their phone number which is odd so I deleted it

The screenshot shows a web-based interface for editing a notification template. At the top, there are navigation tabs for 'Customization', 'Z39.50', 'Notification Templates', and 'Server Addons'. The main section is titled 'Template Details' and contains the following fields:

- Name:** ILL Borrowing Loan Delivery
- Description:** The notification e-mail text used for loans delivered to customers.
- E-mail / SMS:** Two tabs are present, with 'E-mail' selected.
- From Name:** (Empty text box)
- To Name:** (Empty text box)
- CC Address:** (Empty text box)
- Subject:** Requested Loan Available

Below the form fields is a preview of the email template text:

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 the Interlibrary Loan Staff.
As per your instructions regarding your preferred loan delivery method, it is now in transit to you service to the following address:
<#User.FirstName> <#User.LastName>
<#User.Address>
<#User.Address2>
<#User.City> <#User.State> <#User.Zip>
If you do not receive your loan within one week, please let us know.
This item is due back to the library by: <#Transaction.DueDate>.
Interlibrary Loan office hours are <#LocalInfo.BorrowingHours>.

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Expiring Users

Before you watch the ILLiad Power up by Atlas (about an hour)

1. read through their FAQs page
2. Download the slides on their page, you'll be copying configurations on slide 16 or 17
3. Watch the video if you like or just dive in and make the keys in your customization manager match that of slide 16...

<https://support.atlas-sys.com/hc/en-us/articles/360045229454-ILLiad-Power-Up-User-Expiration-Q-A>

For help along the way:

Connect with me: Meghann@humboldt.edu