Preparing for Fall 2020: ILLiad Mail to Address

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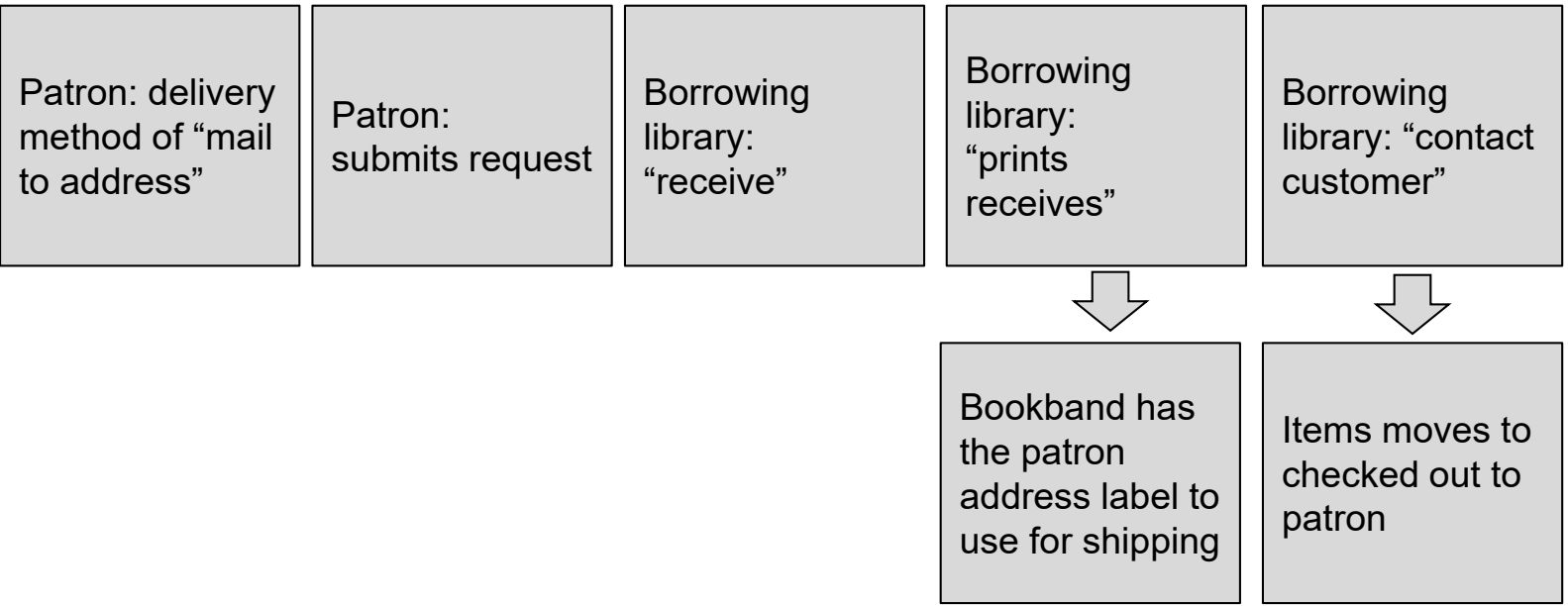
Lifecycle:using mail to address workflow

Heather Black from Atlas did a video on ILLiad's mail to address functionality:
https://training.atlas-sys.com/Course/Details/4340



Setting up mail to for ILLiad Checklist

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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,expirng 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

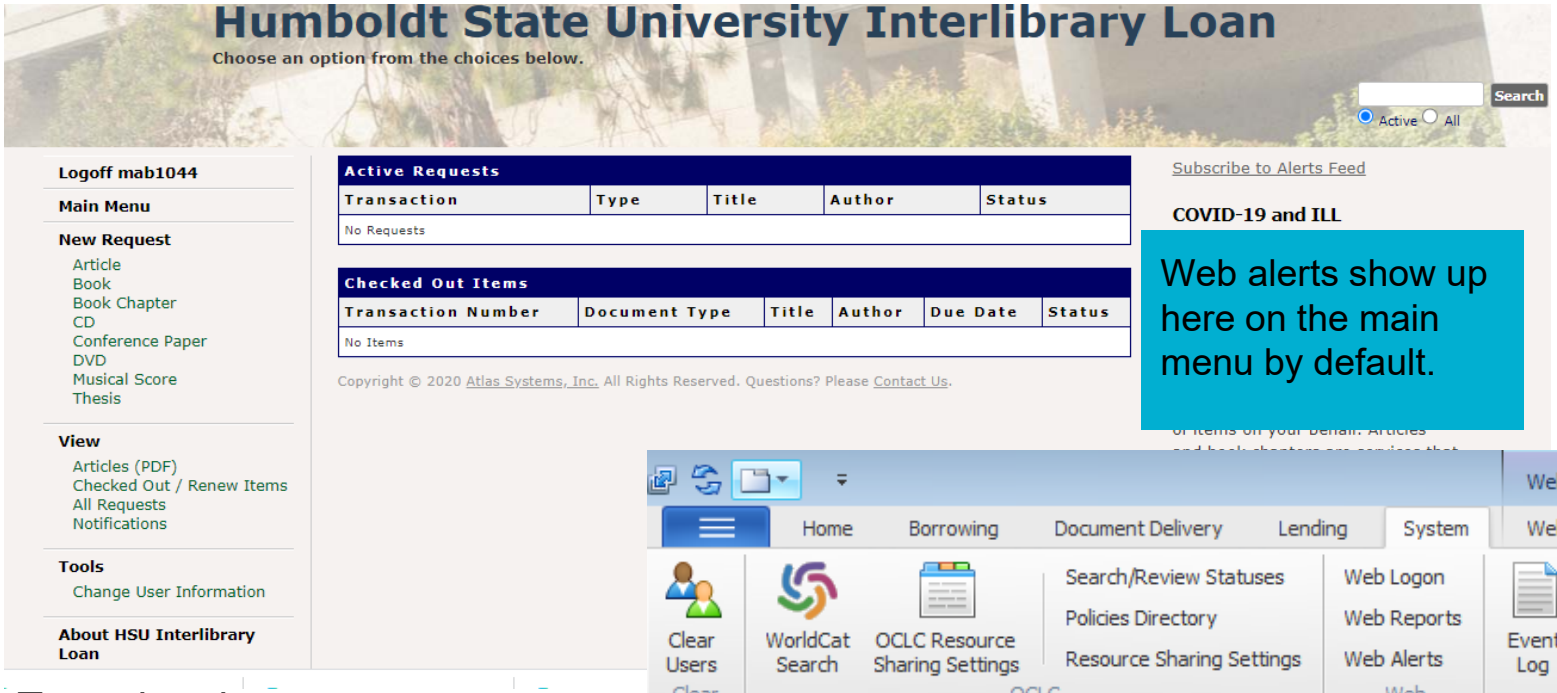
2. Make sure your changeuserinformation.html has all the fields you want to collect

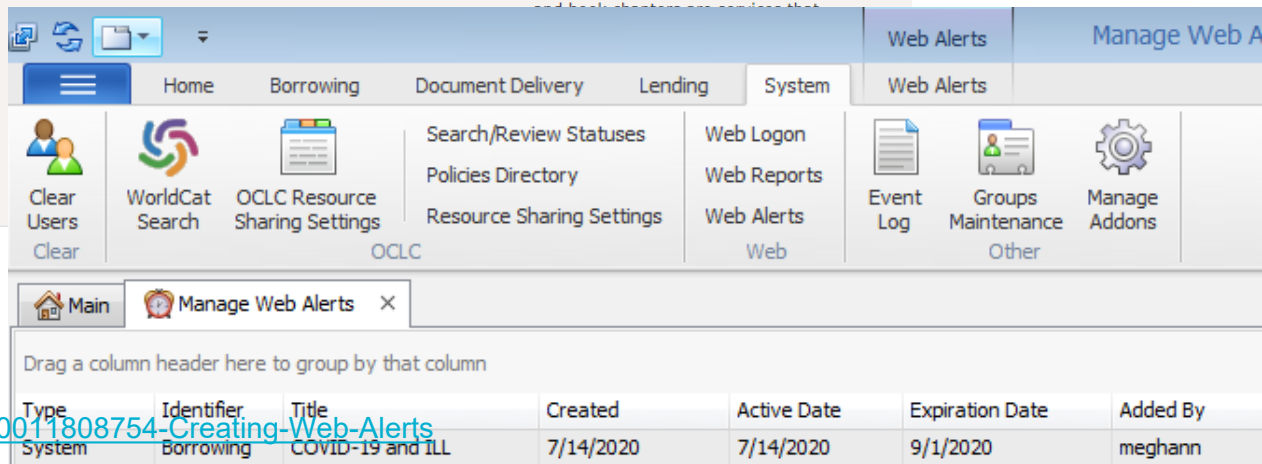
Who is already using ILLiad 9.1?

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





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

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

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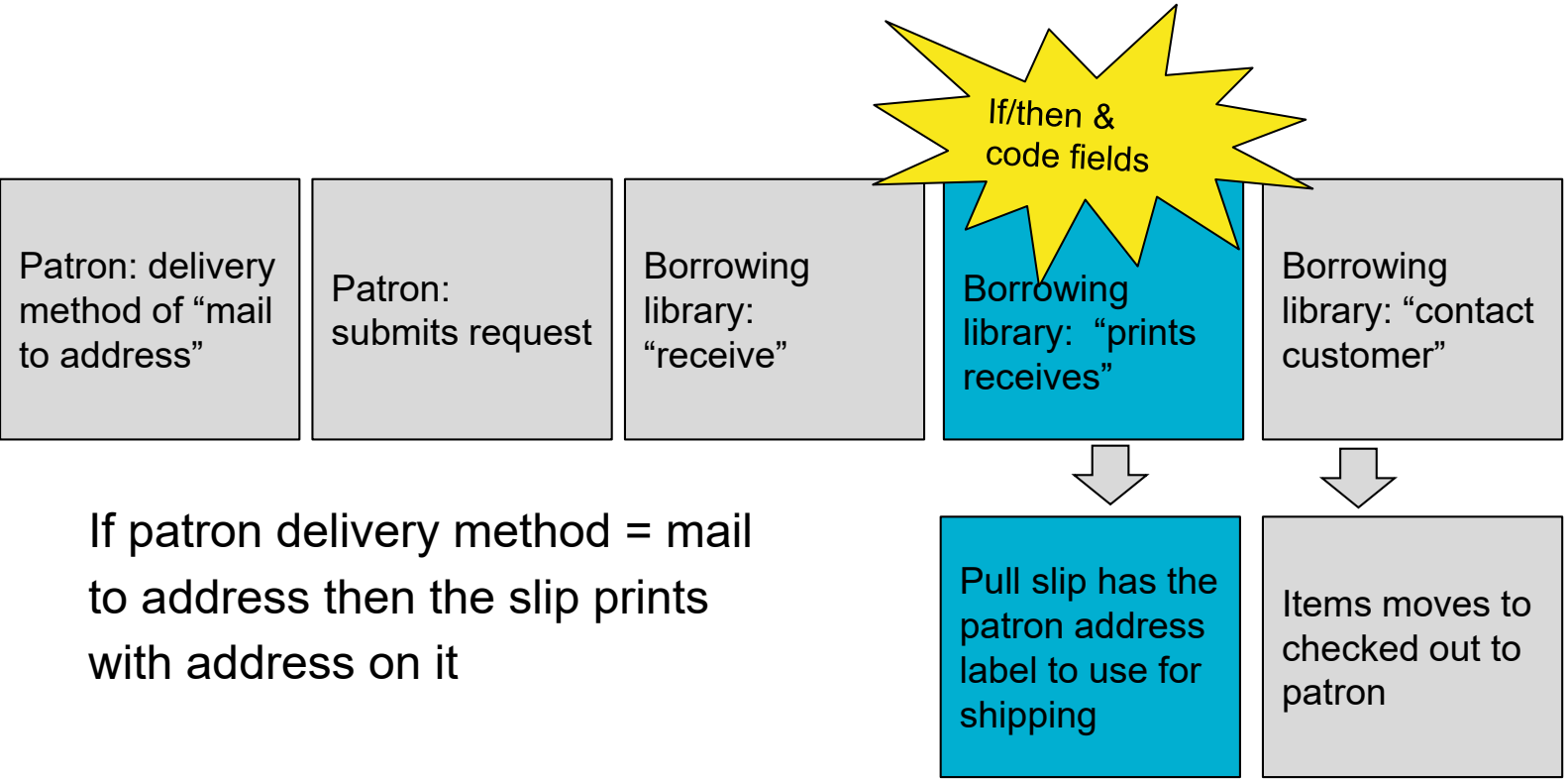


If patron delivery method = mail to address then the slip prints with address on it

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 q ueue 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 va lues 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/360044611673-How-to-edit-an-ILLiad-print-template

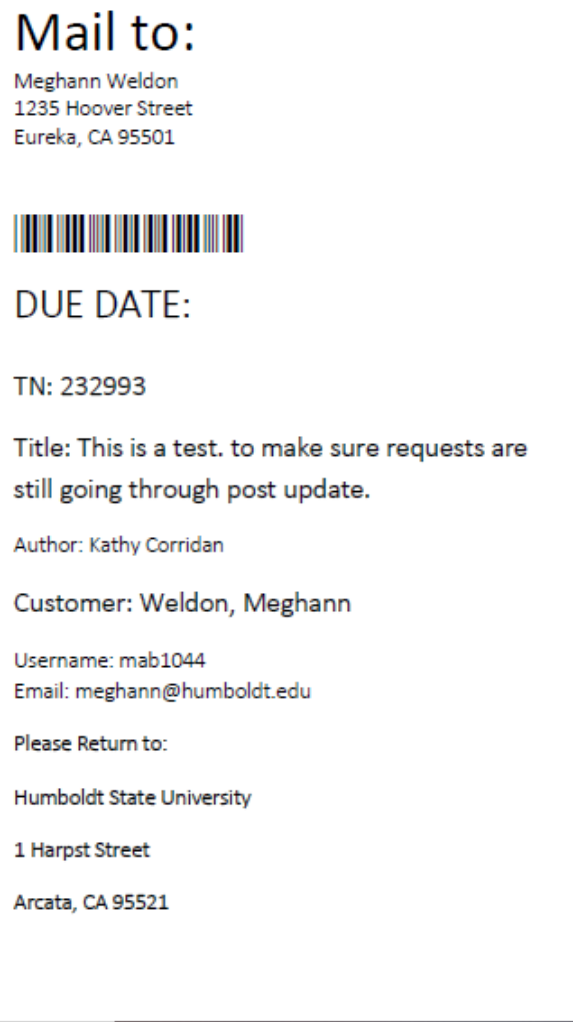
https://support.atlas-sys.com/hc/en-us/articles/360011807874-Hidden-Field-Codes

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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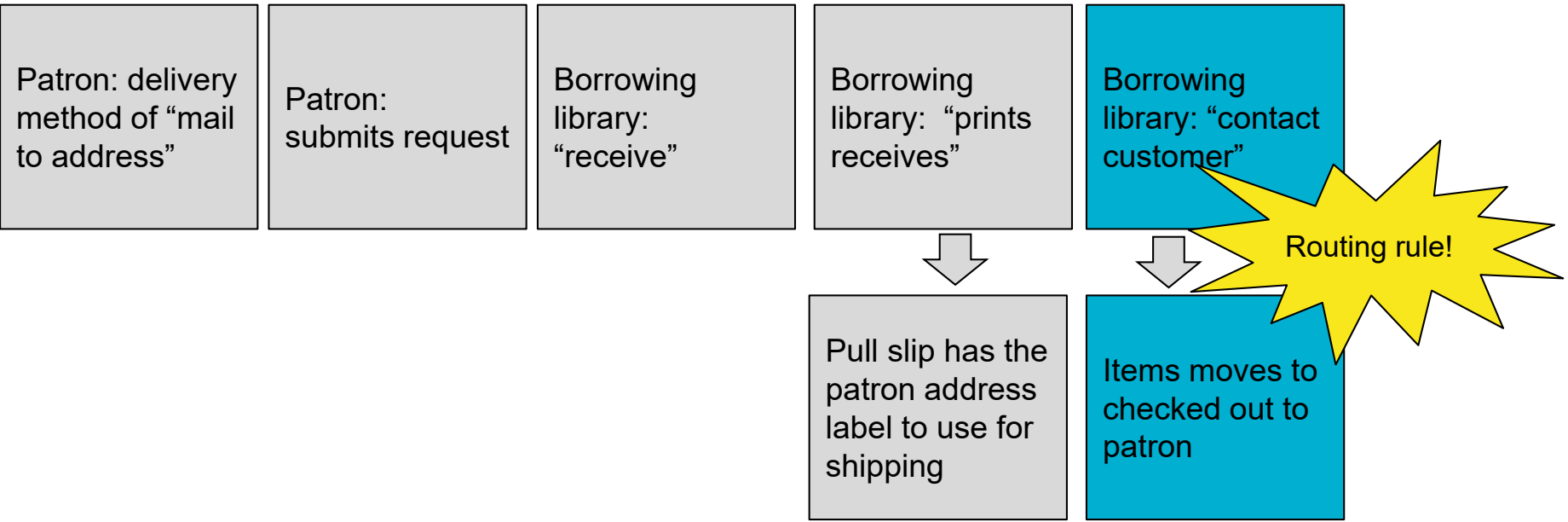

ILLiad Mail to Routing Rule

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 eas

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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

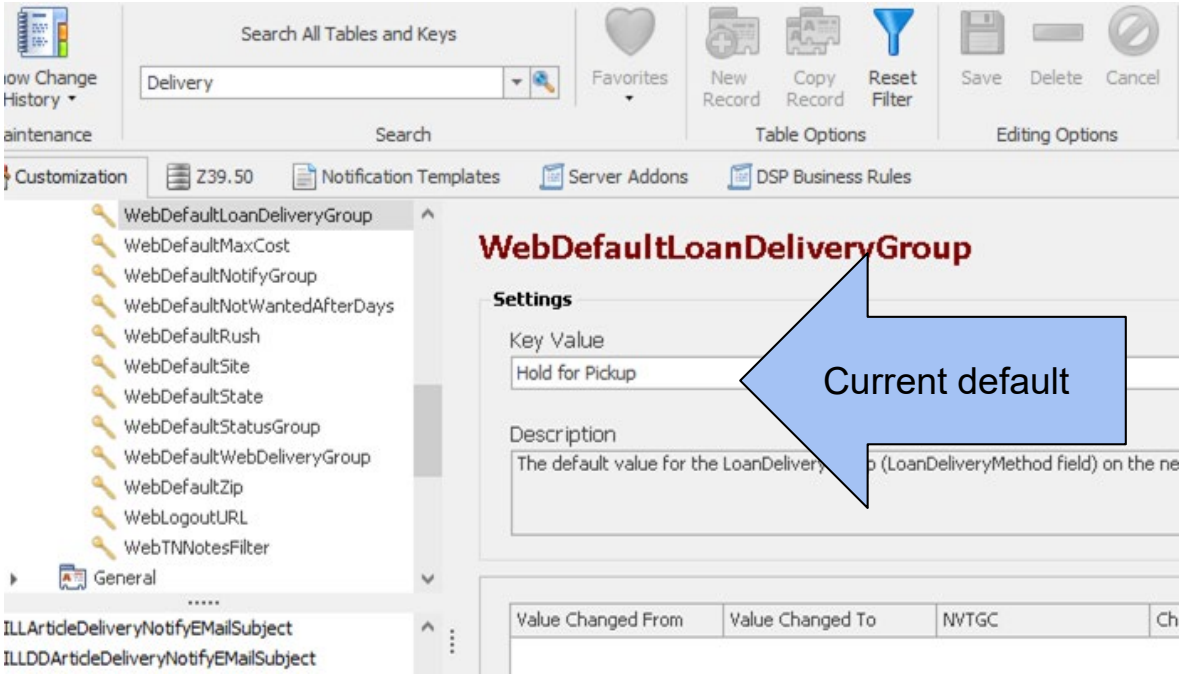
```
            <section name="delivery-method-info" >
                    <h3>Delivery Methods</h3>



                    <div class="form-group col-md-5">
                            <label for="LoanDeliveryGroup">
        <span class="field">
            <span class="<#ERROR name='ERRORLoanDeliveryGroup'>">
                Preferred Loan Delivery Method
            </span>
        </span>
        <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 new users?

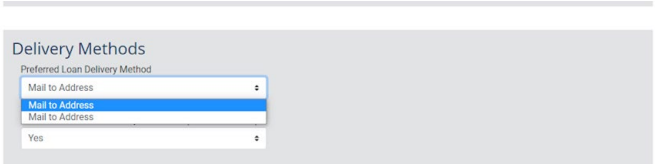
The easiest way it to change the

WebDefaultLoanDeliveryGroup in the customization manager:

Mail to Address



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



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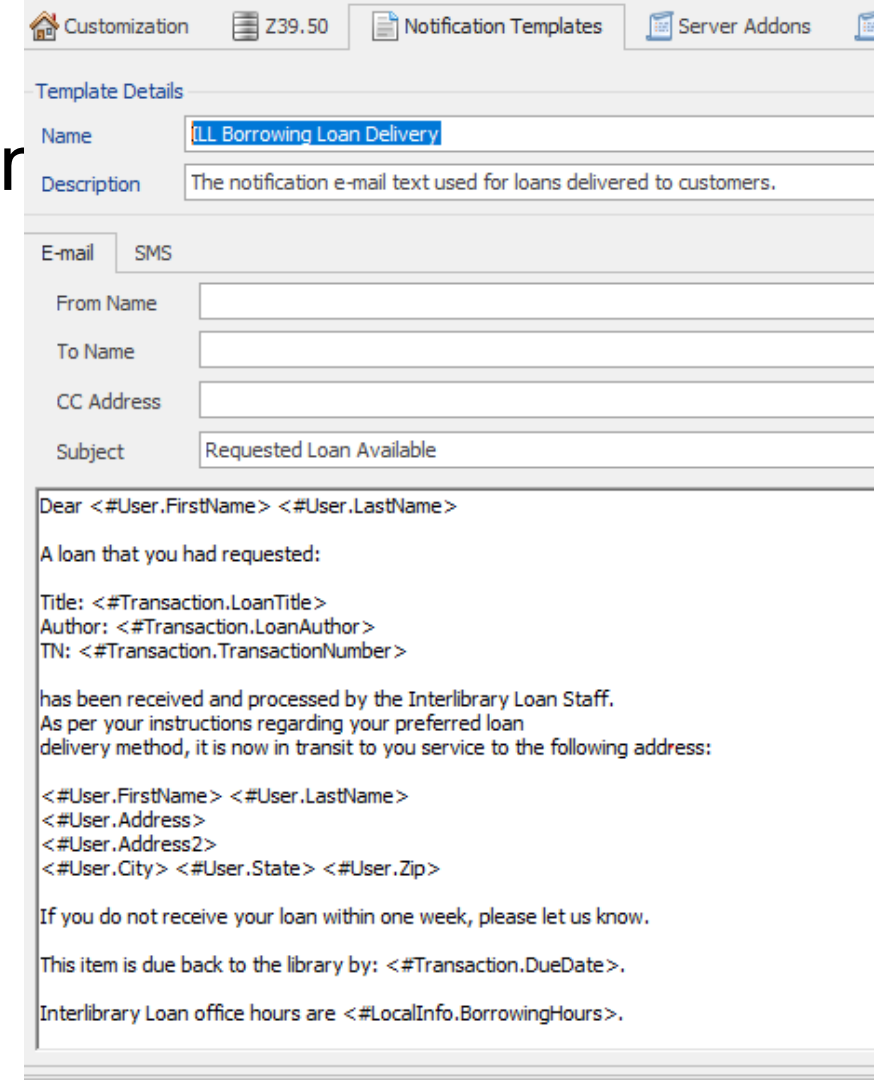
Patron notification messagir

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



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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