Having Fun with ILLiad: Tricks to Customize & Simplify Your Workflows

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OCLC ILLIAD INTERNATIONAL CONFERENCE
MARCH 24, 2011
Day-to-Day Workflows
Workflow/Project Support
Your Customizations?
Day-to-Day Workflows

- Locally-Owned Materials
- Non-OCLC Requests
- Add-ons
- Book Series Queue
Locally-Owned Materials: Electronic Copies

[Image of a computer window showing a menu with options such as "ACQ", "ALA Request", "Email Author", "Full Text @ UL", and a section of text about filling out request forms and accessing full text.]

[Text snippet: "Locally-Owned Materials: Electronic Copies. Full Text @ UL option highlighted in a menu.]

[Further text: "Google Search", "Google Scholar Search", "Send Request Citation", "WorldCat Local Search", "Edit Email Form"]

[Note: This appears to be an interface for requesting electronic copies of materials, with options for different types of requests and access to full text if available.]
Locally-Owned Materials: Electronic Copies

Dear PATRON,
A request you have placed:
SAE 952314 Swirl, fuel composition, localized heating, and deposit effects on engine knock location
[SAE 952314
1993
Swirl, fuel composition, localized heating, and deposit effects on engine knock location
SAE International
Transaction Number: 1793763
is available electronically. To obtain the full text, please follow the directions below:
This item is available electronically through FindIt. To obtain the full-text, search the Find It menu at [http://digital.library].
This item is available electronically through MacCat. Search MacCat for the journal title and select the electronic record. Once in that, use the FindIt link from within MacCat to access your article.
The article is available in IEEE Xplore. Go to [http://www.library.wisc.edu], click on the databases tab, enter "IEEE" in the search box and click on IEEE Xplore. Click on Advanced Search and search for your article.
This item is available in Dissertations & Theses Full Text. Go to [http://www.library.wisc.edu], click on the databases tab, enter "Dissertations & Theses Full Text" in the search box. From there you can search for the title.
This article is available through the SAE Digital Library. Go to [http://www.library.wisc.edu], click on the databases tab, enter SAE in the search box and click on SAE Digital Library.
This article is available for free at the following website: [ENTER WEBSITE]
If you have a question about this request, please contact the interlibrary loan office at gonzilibrary@library.wisc.edu.

Sincerely,
University of Wisconsin-Interlibrary Loan Department
Locally-Owned Materials: Loans

- The University of Wisconsin Madison has over 40 libraries across the campus.
Locally-Owned Materials: Loans

- We are also part of the University of Wisconsin System which has an additional 26 libraries.
Locally-Owned Materials: Loans

- We are able to get materials from any of these libraries using our shared catalog!
Locally-Owned Materials: Loans

Dear AMY WINKELMAN,

A request you have placed:

YOYA interview with Nancy Garden
Chelton, Mary K
1990

Transaction Number: 1799156

is available from a UW System library. A request for it has been placed on your behalf using MadCat’s UW System Search (http://digital.library.wisc.edu/1711.web/uwsystemsearch). You will be notified when the book is available.

is available from a UW-Madison library. A request for it has been placed on your behalf using MadCat’s Place Requests button. You will be notified when the book is available.

will be purchased by the library and added to its collection. You will be notified by e-mail when it is available.

If you have a question about this request, please contact the interlibrary loan office at gzmil@library.wisc.edu.

Sincerely,
University of Wisconsin-Interlibrary Loan Department
Locally-Owned Materials: Loans

Email Editing

To: upui.edu

CC:

Subject: ILL Request Transferred to Request Delivery

Dear [Recipient],

A request you have placed:

Title: Police in a multicultural society: an American story / Author: Barlow, David E. (David Edward)

Date: 2000

OCLC: 601301

has been processed by the Interlibrary loan staff and was:

Ordered for you from an IU Library using Request Delivery.

To track the status of this request, use IUCAT's My Account (http://www.iucat.iu.edu/authenticate.cgi?status=myAccount) instead of ILLiad. You will receive an email notification when this item is available for you to pick up.

For future reference, if you know that an item is available from another IU Library, you may request it directly through the Request Delivery feature in ILLiad. To use Request Delivery, you must log in to IUCAT. When you find an item you want to request, click on the title to view the full record. The Request Delivery link appears in the right menu. To learn more and view a demonstration, visit http://www.iub.upui.edu/ill/info/request.

You cannot Request Delivery of items that are checked out or on reserve. For these items, please place an interlibrary loan request.

If you have a question about this request, please contact the interlibrary loan office at upui@upui.edu.

9137-274-9000

with the Transaction Number 601301.

For current library hours, please visit this website: http://www.iub.upui.edu/illinfo/hours.html

Interlibrary Loan office hours are Monday - Friday, 8am - 5pm EST.

Thank you for using Interlibrary Loan and ILLiad.

Questions and comments regarding Interlibrary Loan policies and procedures may be directed to upui@upui.edu.

Awaiting Request Processing
Non-OCLC Requests: ALA

Request sent on 2/22/2011 9:52:23 AM
Authorized by Heather Wellin

From: Memorial Library Interlibrary Loan
University of WI-Madison
720 State Street, Room b106d
Madison, Wisconsin 53706-1494
Phone: (608) 262-1193
Fax: 608.262.6300
OCLC Symbol: G2M
gzmill@library.wisc.edu

Please lend or copy the following item:

Title: Playbill for The woman hater's club, newest European musical comedy, the biggest novel

Please contact us if you are not able to fill this request or with any questions you may have.

Sincerely,
University of Wisconsin Interlibrary Loan Department
Non-OCLC Requests: NLM

Subject: Interlibrary Loan Request

TN: 596349

Request Type: Article

From:
Interlibrary Loan
IUPUI University Library
NLMLIBED: INUICJH OCLC: IUP
725 West Michigan St.
Indianapolis, IN 46202-5195
Phone: 317-274-0500
ARIEL: 134:68:173:15
E-Mail: ull@iupui.edu

Author: De Luca, L.
Book or Journal Title: Minerva gastroenterologica e dietologica
Article Title: Is smoking a prognostic factor in patients with chronic hepatitis C?
Article Volume, No.: 55, 2
Article Year: 2009
Article Pages: 139-143

Verified In:

Copyright Compliance:

Will Pay Maximum Cost of $25.00

TO:
National Library of Medicine
Circulation and Control Section
8600 Rockville Pike
Bethesda, MD 20890
Fax: 301-496-2809
E-Mail: custserv@nlm.nih.gov

Tina Bach, ILL Librarian, authorizes this interlibrary loan request.
Dear Colleague:

One of our patrons has requested the following item held by your library. Would you be willing to loan us this item?

\(<\!\#\text{LoanAuthor}\!\>\!\<\!\#\text{PhotoArticleAuthor}\!\>\!\<\!\#\text{PhotoArticleTitle}\!\>\!\<\!\#\text{LoanTitle}\!\>\!\<\!\#\text{PhotoJournalTitle}\!\>\!\<\!\#\text{PhotoJournalVolume}\!\>\!\<\!\#\text{PhotoJournalIssue}\!\>\!\<\!\#\text{PhotoJournalYear}\!\>\!\<\!\#\text{PhotoJournalInclusivePages}\!\>\!\<\!\#\text{LoanPlace}\!\>\!\<\!\#\text{LoanPublisher}\!\>\!\<\!\#\text{LoanNumber}\!\>\!\<\!\#\text{LoanDate}\!\>\!\<\!\#\text{CallNumber}\!\>\!\<\!\#\text{Location}\!\>\!

We are able to pay via IFLA vouchers or Visa credit card.

Thank you,
Tina Baich

Assistant Librarian
Interlibrary Loan
IUPUI University Library  OCLC: IUP
755 West Michigan St
Indianapolis, IN 46202-5195
USA

Phone: 317-274-0500
ARIEL: 134.68.173.15
E-Mail: ulill@iupui.edu

TN: <\!\#\text{TransactionNumber}\!\>
Dear <#PhotoArticleAuthor>:

I am writing from the interlibrary loan department of Indiana University-Purdue University Indianapolis. One of our patrons has requested your <#PhotoJournalYear> <#PhotoJournalTitle> paper, "<#PhotoArticleTitle>.

Have you published this paper somewhere? If not, would you be willing to send an electronic copy for our patron's research use?

I appreciate any help you can offer.

Thank you,
Tina Baich

Assistant Librarian
Interlibrary Loan
IUPUI University Library
755 West Michigan St
Indianapolis, IN 46202-5195
Phone: 317-274-0500
E-Mail: ulill@iupui.edu

TN: <#TransactionNumber>
Book Series Custom Queue

Should really be Protein Networks and Pathways Analysis (OCLC #310401023)
Thesis Request Processing

Dear Dave Taylor,

The following item that you requested through Interlibrary Services was found freely available on the internet:

Title: Hardness and homelessness: A strengths-based perspective of service use by veterans who are homeless.
Author: Petrovich, James
Year: 2009

We have made it conveniently available for download from your ILLiad account. You can access it by clicking here: https://illib.iupui.edu/ILLpdf/601057.pdf or by logging into your ILLiad account: https://illib.iupui.edu/ILL/illlogin.html

You can also view the item at the following URL: [URL]

If you have any questions about this service, please contact us and refer to the Transaction Number: 601057.

Thank you for using the ILS Service, please let us know how we are doing, we appreciate your feedback.

Sincerely,
Interlibrary Services (ILS) Staff

Please email us at ill@iupui.edu or Tel 317-274-3560
Workflow/Project Support

- Purchase on Demand/Unfilled Purchase Program
- Non-ILL Staff Processing Queues
- Special Returns
- Library Use Only Items
- Lost Billing Workflows
- Open Access Searching
Purchase on Demand Program

- **IUPUI University Library Criteria**
  - Published in current year or 3 previous years
  - Price limit of $100
  - Paperback and DVD are preferred format
  - Will purchase e-book if user indicates acceptable
  - Will not purchase textbooks, test prep or computer manuals, audio CDs, popular titles outside scope of collection
Purchase on Demand Custom Routing
Dear Acquisitions,
A request has been submitted that is eligible for purchase.
Ebook Format Acceptable?:
Title: <#LoanTitle>
Author: <#LoanAuthor>
Year: <#LoanDate>
Edition: <#LoanEdition>
Publisher: <#LoanPublisher>
Publisher Location: <#LoanPlace>
ISBN: <#ISSN>
OCLC: <#ESPNumber>
ILLiad Transaction Number: <#TransactionNumber>

Thanks!
UL ILL Folks
E-Mail: <#LendingEmailAddress>
Phone: <#LendingPhone>

This request has been forwarded from ILL by <#User>.
Purchase on Demand Program

- Upon receipt, items are rush cataloged and processed in bindery
- ILL checks in item, places and traps hold in ILS, and notifies customer using custom email
Purchase on Demand Custom Email to User

Dear <FirstName> <LastName>

Responding to your recent ILL request placed through ILLiad, University Library has acquired this book as part of a trial project for on-demand, rapid delivery book purchases.

The title you requested has arrived, has been cataloged, and is now available for checkout at the Circulation desk on the 2nd floor of University Library. It will be held there for 14 days.

Loan Title: <LoanTitle>
Loan Author: <LoanAuthor>
TN: <TransactionNumber>

You will be checking this book out like you would any other book in the library’s collection, including requesting renewals through IUCAT’s ‘My Account’ section.

You will now see this request in your request history in ILLiad.

Your feedback is important to us for determining the success of this project. You can reply to this email and leave your feedback, and if you would like to leave anonymous feedback, you may do so by sending it to us in campus mail, attn: Tina Balch, UL 1115.

(1) Did this book arrive in time to meet your needs?
YES / NO

(2) In your opinion, what is the usefulness of this book as a permanent addition to University Library’s collection?
Very Useful / Moderately Useful / Marginally Useful

(3) Other comments you have about this trial service, or any other comments relating to Interlibrary Loan:

Thank you!

For current library hours, please visit this website:
http://www.ulib.iupui.edu/libinfo/hours.html

Interlibrary Loan office hours are <BorrowingHours>.

Thank you for using Interlibrary Loan and <SystemName>. Questions and comments regarding Interlibrary Loan policies and procedures may be directed to <GeneralEmailAddress>
Our office phone number is <GeneralPhone>.
Unfilled Purchase Program

- Unfilled material that:
  - Does not circulate from any library
  - Costs under $20 to purchase
  - Can be any format!
Unfilled Purchase Program

To: corders@library.wisc.edu

CC: 

Subject: ILL Express

We would like the following item purchased for $20 or under through the ILL Express Program:

Loan Author: Kingston, Maxine Hong.
Loan Title: I love a broad margin to my life /
OCLC number: 667975595
Shelving Library: *UWIL, G26, JL, IM2D

Patron information:
Patron Name:
ID: 123456789
Pick Up Library: 

This was ILLiad Transaction Number: 1796669

Thank you,

University of Wisconsin-Interlibrary Loan Department
Non-ILL Staff Processing Queues

Memorial Library received the following article:

Article Title: Subcortical functions in language: a working model.
Article Author: Croceon.
Journal Title: Brain and language
Journal Volume: 25
Journal Issue: 2
Journal Month/Date: 1985
Pages: 257-292
TN: 1798742

Call Number: Q 78721
Location: ebling

Instructions:
- Save this file in the R:\Odyssey\help\Memorial\DocDel\.

If you have questions please contact the ILL staff at gzmill@library.wisc.edu or 262-1193.

Thank you,

Memorial Library
University of Wisconsin-Interlibrary Loan Department
Give to Supervisor & Special Returns
Lost Billing Workflows

- **Borrowing**
  - Replacement Estimate email
  - Pre-bill User Notice email

- **Lending**
  - Pre-bill Library Notice email
  - Request Bill for Lost or Damaged Items email
Google Custom Queue

[Diagram of a software interface with options for Borrowing, Document Delivery, Lending, and System. The interface shows a list of requests including 'Check Google', 'Awaiting Doc Provider Processing', 'Awaiting Request Processing', 'Request in Processing', 'No Work Needed', 'Author Emailed', and 'Awaiting Email Response from Author'.]
Open Access Searching
Open Access Searching Using Addons
Addons for Open Access
Open Access Processing

- Establish a lender address
- Create a custom email
- Create email routing rule
Add Lender Address
Dear Patron,

The following item that you requested through Interlibrary Services was found freely available on the internet at [PASTE URL HERE].

Thank you for using the ILS Service. If you have any questions about this service, please contact us at ulill@iupui.edu or 317-274-0500.

Sincerely,
Interlibrary Services (ILS) Staff
Email Routing Rule

![Email Routing Rule Diagram](image)

The diagram shows a table titled **EMailRouting** with columns for **ProcessType**, **Name**, **DefaultToAddress**, **DefaultToName**, **DefaultCCAddress**, and **DefaultSub**. The rows detail various routing rules for different processes, such as Lending, Borrowing, and NLM Request, with corresponding actions like ILL Request, Open Access, and Interlibrary Services Delivery Notice.
Lender and System ID
Share your Workflow tips!
Questions?

TINA BAICH
CBAICH@IUPUI.EDU

HEATHER WELTIN
HWELTIN@LIBRARY.WISC.EDU