Creating the Email

1. What should the email do? Ask yourself...
   a. Is this a Borrowing, Lending, or Document Delivery email?
   b. What information should be pulled from the request?
   c. What should the email say?
   d. Will the same text work for loans AND articles or should the email say something different if it’s an article rather than a loan?
   e. Does the queue to route the request to already exist?
      a. If the queue does not exist, will any other requests route to that queue or is it ONLY for this particular email?

2. Create the email using Email Templates in ILLiad Customization Manager
   a. Email Templates tab – “New”
Example Email – notifies the patron that a book was purchased

Template Details:
Name: notifybookpurchase.txt
Description: Email to notify patron we have ordered requested book for collection - 8/13/15 DMM

Dear <#FirstName> <#LastName>:

You recently requested to borrow the book on interlibrary loan:

<#LoanTitle>
<#LoanAuthor>
<#LoanDate>
<#LoanPublisher>

This book proved to be difficult to borrow and was a good fit for the ISU Library, so an order was placed to purchase it for the collection.
You will be notified when the item is available for checkout.

We hope you find this service beneficial to your academic pursuits. Please contact me with any comments you may have about our interlibrary loan-initiated purchase program.

Cordially,
Dawn Mick
Resource Sharing Librarian
Creating the Email Routing Rule

1. Click on Home tab – System – Email – Email Routing
2. Click on New Record

Notification that item was purchased

<table>
<thead>
<tr>
<th>ProcessType</th>
<th>Name</th>
<th>DefaultToAddress</th>
<th>DefaultToName</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing</td>
<td>Notification of Purchase</td>
<td>#EmailAddress</td>
<td></td>
</tr>
</tbody>
</table>

Notification that item has arrived

<table>
<thead>
<tr>
<th>ProcessType</th>
<th>Name</th>
<th>DefaultToAddress</th>
<th>DefaultToName</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing</td>
<td>Purchased Item has Arrived</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DefaultToAddress</th>
<th>DefaultToName</th>
</tr>
</thead>
<tbody>
<tr>
<td>#EmailAddress</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DefaultFromAddress</th>
<th>DefaultFromName</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:nickld@lastate.edu">nickld@lastate.edu</a></td>
<td>Mick, Dawn [LIB]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DefaultCCEAddress</th>
<th>DefaultCCEName</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DefaultSubject</th>
<th>DefaultCountry</th>
<th>DefaultState</th>
<th>DefaultCity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recent Request for &lt;#LoanTitle&gt;</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DefaultFromLocation</th>
<th>DefaultFromPostalCode</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FileNameLoan</th>
<th>FileNameArticle</th>
</tr>
</thead>
<tbody>
<tr>
<td>notifybookpurchase.txt</td>
<td>notifyarticlepurchase.txt</td>
</tr>
</tbody>
</table>
**Process Type** – Borrowing, Lending, or Doc Del

**Name** – Displays when the Send Email button is selected in ILLiad Client

**DefaultToAddress**: Email address message will be sent to. If left blank, will default to patron email.

🌟 Best practice is to input the Email tags in the DefaultToAddress and DefaultFromAddress fields.

**DefaultToName**: Will list the person’s name next to the email address

**DefaultCCAddress**: Email address to CC the message to

**DefaultSubject**: Subject of Email

**DefaultFromAddress**: Will default to the email set in the EmailFromAddress field

**DefaultFromName**: Will list this name next to the email address

**DefaultStatus**: The status (queue) the item should route to once the email is sent

**FileNameLoan**: Name of the Email Template used for loan requests

**FileNameArticle**: Name of the Email Template used for article requests

🌟 Both FileName fields are case AND space-sensitive, so enter the name **exactly** the same as the Email Template Name or the email and routing rule may not work correctly.
**Routing from Borrowing to Document Delivery**

1. Create a Custom Queue (if it doesn’t already exist) for the borrowing request to move to BEFORE it will move to Document Delivery.
2. Home tab – System – Custom Queues – CustomQueue
   a. Click the New button
Creating the Routing Rule

   a. Click New Record or Copy Record

**RuleNo** – Rules are run in numeric order. Be sure no 2 routing rules apply to the same transaction at the same time.

**RuleActive** – Yes or No

**Process Type** – Borrowing, Lending, or Doc Del

**TransactionStatus** – The queue/status the request is in when the routing rule is applied. Case Sensitive AND Space Sensitive

**MatchString**: Query string that uses a form of SQL language to direct ILLiad what to do with this particular routing rule. Uses the Users, Transactions, or Lender Addresses tables unless a compound rule is used.

★ More explanation can be found at [https://prometheus.atlas-sys.com/display/illiad/Example+Routing+Rules](https://prometheus.atlas-sys.com/display/illiad/Example+Routing+Rules)

**New Process Type** – Borrowing, Lending, or Doc Del (the process where the request lands)

**NewTransactionStatus** – The queue/status the request will end up in when the routing rule is applied. Case Sensitive AND Space Sensitive

**RuleDescription**: What the rule is for, name or initials, and date.
Resources Available in the ILLiad documentation

General Documentation link: https://prometheus.atlas-sys.com/dashboard.action

Email Templates: https://prometheus.atlas-sys.com/display/illiad/CreatingsAndEditingEmailTemplates#CreatingandEditingEmailTemplates-TemplateTagsandTableFieldsintheCustomizationManager

Email Routing Rules: https://prometheus.atlas-sys.com/display/illiad/AddingEmailRoutingRules

Custom Queues: https://prometheus.atlas-sys.com/display/illiad/CreatingCustomQueues

Routing Rules: https://prometheus.atlas-sys.com/display/illiad/ConfiguringRoutingRules

Match String Examples and Rules: https://prometheus.atlas-sys.com/display/illiad/ExampleRoutingRules