The Routing Not Taken: Using Email and Routing Rule Customization to Streamline ILLiad Request Processing

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The Routing Not Taken: Using Email and Routing Rule Customization to Streamline ILLiad Request Processing

Abstract
Learn how to create customized emails & routing rules so you can focus on what matters: your patrons! The session will cover how Iowa State customized ILLiad to improve patron communication and streamline Borrowing request processing.

Disciplines
Library and Information Science

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Routing Not Taken

Using Email and Routing Rule Customization to Streamline ILLiad Request Processing

Dawn Mick
Resource Sharing & Monograph Acquisitions
Iowa State University
Agenda

• Routing at Iowa State
• How to:
  • Email Templates
  • Email Routing
  • Routing Rules
Creating an Email Template (ILLiad 8.5)

Name of email

Description of email along with name/initals and date

Right-click in the message body to get a list of fields mapped to the ILLiad request
Dear <#FirstName> <#LastName>:

You recently requested to borrow this 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 Nick
Resource Sharing Librarian
Creating the Email Routing Rule

Notification of Purchase

<table>
<thead>
<tr>
<th>Process Type</th>
<th>Name</th>
<th>Default To Address</th>
<th>Default To Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing</td>
<td>Borrowing Restrictions</td>
<td>&lt;#EmailAddress&gt;</td>
<td></td>
</tr>
<tr>
<td>Borrowing</td>
<td>Loan Recall</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Borrowing</td>
<td>More Information Needed</td>
<td>&lt;#EmailAddress&gt;</td>
<td></td>
</tr>
<tr>
<td>Borrowing</td>
<td>Notification of Purchase</td>
<td>&lt;#<a href="mailto:First.LastName@domain.com">First.LastName@domain.com</a>&gt;</td>
<td></td>
</tr>
<tr>
<td>Borrowing</td>
<td>NR Reminder</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Borrowing</td>
<td>Pre-Pub Purchase Request</td>
<td><a href="mailto:stepsie@orangtnp.edu">stepsie@orangtnp.edu</a></td>
<td></td>
</tr>
<tr>
<td>Acquisitons</td>
<td>Purchase Request</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Edit Row

<table>
<thead>
<tr>
<th>Process Type</th>
<th>Name</th>
<th>Default To Address</th>
<th>Default To Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing</td>
<td>Notification of Purchase</td>
<td>&lt;#<a href="mailto:First.LastName@domain.com">First.LastName@domain.com</a>&gt;</td>
<td></td>
</tr>
</tbody>
</table>

Date: 2022/04/15

Page: 1/1

Author: [Author Name]
Creating the Email Routing Rule continued

<table>
<thead>
<tr>
<th>Process Type</th>
<th>Borrowing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Purchased Item has Arrived</td>
</tr>
<tr>
<td>Default To Address</td>
<td>&lt;#EmailAddress&gt;</td>
</tr>
<tr>
<td>Default To Name</td>
<td></td>
</tr>
<tr>
<td>Default Cc Address</td>
<td></td>
</tr>
<tr>
<td>Default Subject</td>
<td>Recent Request for &lt;#LoanTitle&gt;</td>
</tr>
<tr>
<td>Default From Address</td>
<td><a href="mailto:mickd@iastate.edu">mickd@iastate.edu</a></td>
</tr>
<tr>
<td>Default From Name</td>
<td>Mick, Dawn [LIB]</td>
</tr>
<tr>
<td>Default Status</td>
<td>Route to DocDel Request Finished</td>
</tr>
<tr>
<td>File Name Loan</td>
<td>bookpurchase.txt</td>
</tr>
<tr>
<td>File Name Article</td>
<td></td>
</tr>
<tr>
<td>NVTGC</td>
<td>TLL</td>
</tr>
</tbody>
</table>
Creating a Custom Queue

**CustomQueues**

<table>
<thead>
<tr>
<th>QueueName</th>
<th>ProcessType</th>
<th>NVTGC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting Conditional</td>
<td>Borrowing</td>
<td>ILL</td>
</tr>
<tr>
<td>Processing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awaiting Conditional</td>
<td>Lending</td>
<td>Lending</td>
</tr>
<tr>
<td>Request Processing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awaiting Direct Request</td>
<td>Borrowing</td>
<td>ILL</td>
</tr>
<tr>
<td>Sending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awaiting DMM Review</td>
<td>Borrowing</td>
<td>ILL</td>
</tr>
<tr>
<td>Processing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awaiting ISO ILL Request</td>
<td>Lending</td>
<td>Lending</td>
</tr>
<tr>
<td>Processing</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Name of the queue the item will route to. Note spaces and capitalization**

**Edit Row**

- **QueueName**: Route to DocDel Request Finished
- **ProcessType**: Borrowing
- **NVTGC**: Will default to ILL

- **Borrowing, Lending, or Doc Del**
Creating a Routing Rule

<table>
<thead>
<tr>
<th>RuleNo</th>
<th>RuleActive</th>
<th>ProcessType</th>
<th>TransactionStatus</th>
<th>MatchString</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(LISSN &gt; ' or LESPNumber &gt;') and l.RequestType = 'l'</td>
</tr>
<tr>
<td>1</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Shipping Label Printing</td>
<td>l.RequestType = 'Article'</td>
</tr>
<tr>
<td>2</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Shipping Label Printing</td>
<td>l.RequestType = 'Loan' and l.PriorityShipping = 'Yes'</td>
</tr>
<tr>
<td>3</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Lending Request Processing</td>
<td>t.SystemID = RAPS and t.CallNumber NOT LIKE '%http'</td>
</tr>
<tr>
<td>4</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Lending Request Processing</td>
<td>t.CallNumber LIKE '%http' and t.SystemID = RAPS</td>
</tr>
<tr>
<td>5</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Lending Request Processing</td>
<td>l.RequestType = 'Article' AND t.LISSN &lt;&gt; NULL AND t.ISBN = NULL</td>
</tr>
<tr>
<td>6</td>
<td>Yes</td>
<td>Lending</td>
<td>Awaiting Lending Request Processing</td>
<td>t.TransactionDate in (select distinct TransactionNumber)</td>
</tr>
<tr>
<td>7</td>
<td>No</td>
<td>Lending</td>
<td>Lending</td>
<td>Lending Request Processing</td>
</tr>
</tbody>
</table>

**Edit Row**

<table>
<thead>
<tr>
<th>RuleNo</th>
<th>RuleActive</th>
<th>ProcessType</th>
<th>TransactionStatus</th>
<th>MatchString</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Route to DocDel Request Finished</td>
<td>t.RequestType = 'Loan'</td>
</tr>
</tbody>
</table>

**Description:** Moves all loan requests straight to Document Delivery Request Finished queue.
Thank you for your time!

- Email Templates: https://prometheus.atlas-sys.com/display/illiad/Creating+and+Editing+Email+Templates#CreatingandEditingEmailTemplates-TemplateTagsandTableFieldsintheCustomizationManager

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

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

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

- Match String Examples: https://prometheus.atlas-sys.com/display/illiad/Example+Routing+Rules