



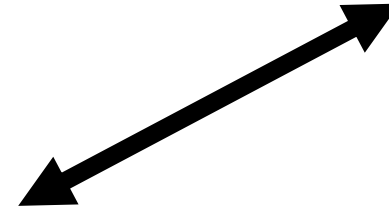
IDS Project Regional User Groups

How Does IDS Logic Work?

ILLiad



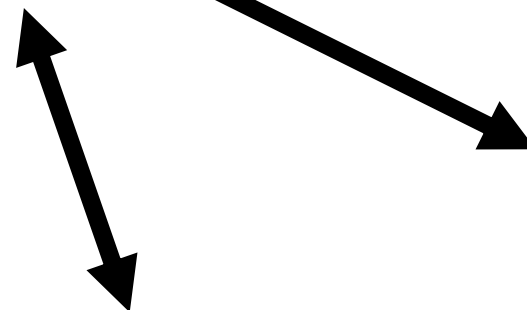
Libraries Configure Logic Rules and Services to best automate workflows, getting data from APIs, web services, and other sources



Z39.50



ALIAS

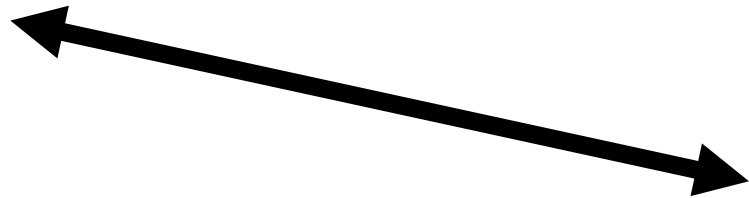


IDS Logic Connection to ILLiad

ILLiad



Server Addon allows full
Read-Write Access to
ILLiad database

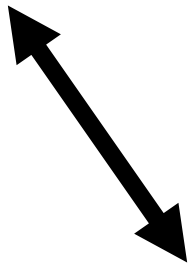


IDS Logic Server Addon
installed in ILLiad
Customization Manager

IDS Logic Server



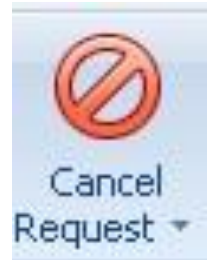
ILLiad will then send
selected commands to
OCLC (i.e. cancel, etc)



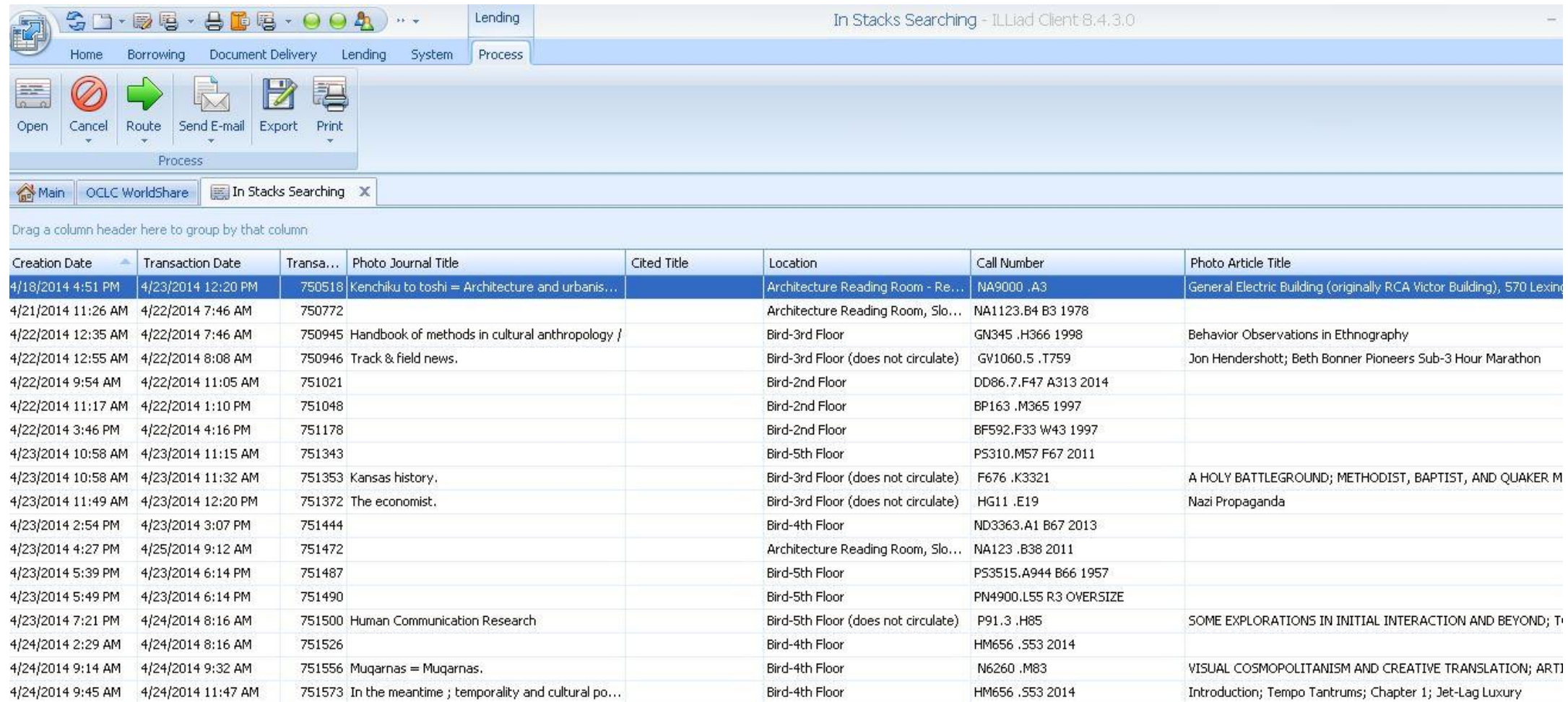
What does this mean to me?

- IDS Logic can insert information into transactions.
- IDS Logic can route transactions.
- IDS Logic can cancel and update transactions in ILLiad and WCRS/Worldshare.
- IDS Logic can send emails to patrons or other libraries based on criteria you give it.
- IDS Logic can read information in transactions and take actions based on criteria.

Terminate the parts of your workflow that are depressing.



The philosophy of IDS Logic is that big queues shouldn't be depressing.



The screenshot shows the 'In Stacks Searching' window of the ILLiad Client 8.4.3.0. The interface includes a top menu bar with 'Home', 'Borrowing', 'Document Delivery', 'Lending', 'System', and 'Process'. Below the menu is a toolbar with icons for 'Open', 'Cancel', 'Route', 'Send E-mail', 'Export', and 'Print'. The main area displays a table of document transactions. The table has columns for 'Creation Date', 'Transaction Date', 'Transa...', 'Photo Journal Title', 'Cited Title', 'Location', 'Call Number', and 'Photo Article Title'. The data rows show various transactions from April 18, 2014, to April 24, 2014, with details on document titles, locations, and call numbers.

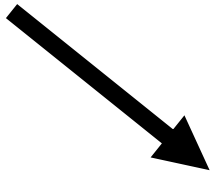
Creation Date	Transaction Date	Transa...	Photo Journal Title	Cited Title	Location	Call Number	Photo Article Title
4/18/2014 4:51 PM	4/23/2014 12:20 PM	750518	Kenchiku to toshi = Architecture and urbanis...		Architecture Reading Room - Re...	NA9000 .A3	General Electric Building (originally RCA Victor Building), 570 Lexing
4/21/2014 11:26 AM	4/22/2014 7:46 AM	750772			Architecture Reading Room, Slo...	NA1123.B4 B3 1978	
4/22/2014 12:35 AM	4/22/2014 7:46 AM	750945	Handbook of methods in cultural anthropology /		Bird-3rd Floor	GN345 .H366 1998	Behavior Observations in Ethnography
4/22/2014 12:55 AM	4/22/2014 8:08 AM	750946	Track & field news.		Bird-3rd Floor (does not circulate)	GV1060.5 .T759	Jon Hendershott; Beth Bonner Pioneers Sub-3 Hour Marathon
4/22/2014 9:54 AM	4/22/2014 11:05 AM	751021			Bird-2nd Floor	DD86.7.F47 A313 2014	
4/22/2014 11:17 AM	4/22/2014 1:10 PM	751048			Bird-2nd Floor	BP163 .M365 1997	
4/22/2014 3:46 PM	4/22/2014 4:16 PM	751178			Bird-2nd Floor	BF592.F33 W43 1997	
4/23/2014 10:58 AM	4/23/2014 11:15 AM	751343			Bird-5th Floor	PS310.M57 F67 2011	
4/23/2014 10:58 AM	4/23/2014 11:32 AM	751353	Kansas history.		Bird-3rd Floor (does not circulate)	F676 .K3321	A HOLY BATTLEGROUND; METHODIST, BAPTIST, AND QUAKER M
4/23/2014 11:49 AM	4/23/2014 12:20 PM	751372	The economist.		Bird-3rd Floor (does not circulate)	HG11 .E19	Nazi Propaganda
4/23/2014 2:54 PM	4/23/2014 3:07 PM	751444			Bird-4th Floor	ND3363.A1 B67 2013	
4/23/2014 4:27 PM	4/25/2014 9:12 AM	751472			Architecture Reading Room, Slo...	NA123 .B38 2011	
4/23/2014 5:39 PM	4/23/2014 6:14 PM	751487			Bird-5th Floor	PS3515.A944 B66 1957	
4/23/2014 5:49 PM	4/23/2014 6:14 PM	751490			Bird-5th Floor	PN4900.L55 R3 OVERSIZE	
4/23/2014 7:21 PM	4/24/2014 8:16 AM	751500	Human Communication Research		Bird-5th Floor (does not circulate)	P91.3 .H85	SOME EXPLORATIONS IN INITIAL INTERACTION AND BEYOND; T
4/24/2014 2:29 AM	4/24/2014 8:16 AM	751526			Bird-4th Floor	HM656 .S53 2014	
4/24/2014 9:14 AM	4/24/2014 9:32 AM	751556	Muqarnas = Muqarnas.		Bird-4th Floor	N6260 .M83	VISUAL COSMOPOLITANISM AND CREATIVE TRANSLATION; ARTI
4/24/2014 9:45 AM	4/24/2014 11:47 AM	751573	In the meantime ; temporality and cultural po...		Bird-4th Floor	HM656 .S53 2014	Introduction; Tempo Tantrums; Chapter 1; Jet-Lag Luxury

Lending Availability Service

ILLiad



Z39.50



Logic stores complex availability settings and rules and interacts between ILLiad and the libraries Z39.50 server to check availability and import all needed information.

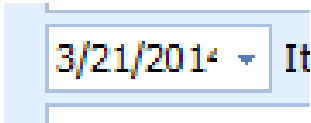
IDS Logic Rules



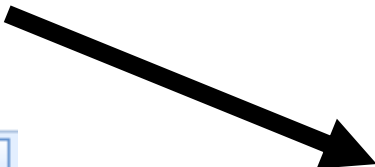
IDS Logic looks for information that is reliably acted upon and takes actions, including notifying patrons



Reformats information



Emails Patron



Updates/Routes Transaction

Date	Type	Added By	Note
3/4/2014 11:48 AM	System	System	Renewal Due Date: 20140321

Release the MicroManagers! (In a Good Way).



In Stacks Searching - ILLiud Client 8.4.3.0

Home Borrowing Document Delivery Lending System Process

Open Cancel Route Send E-mail Export Print

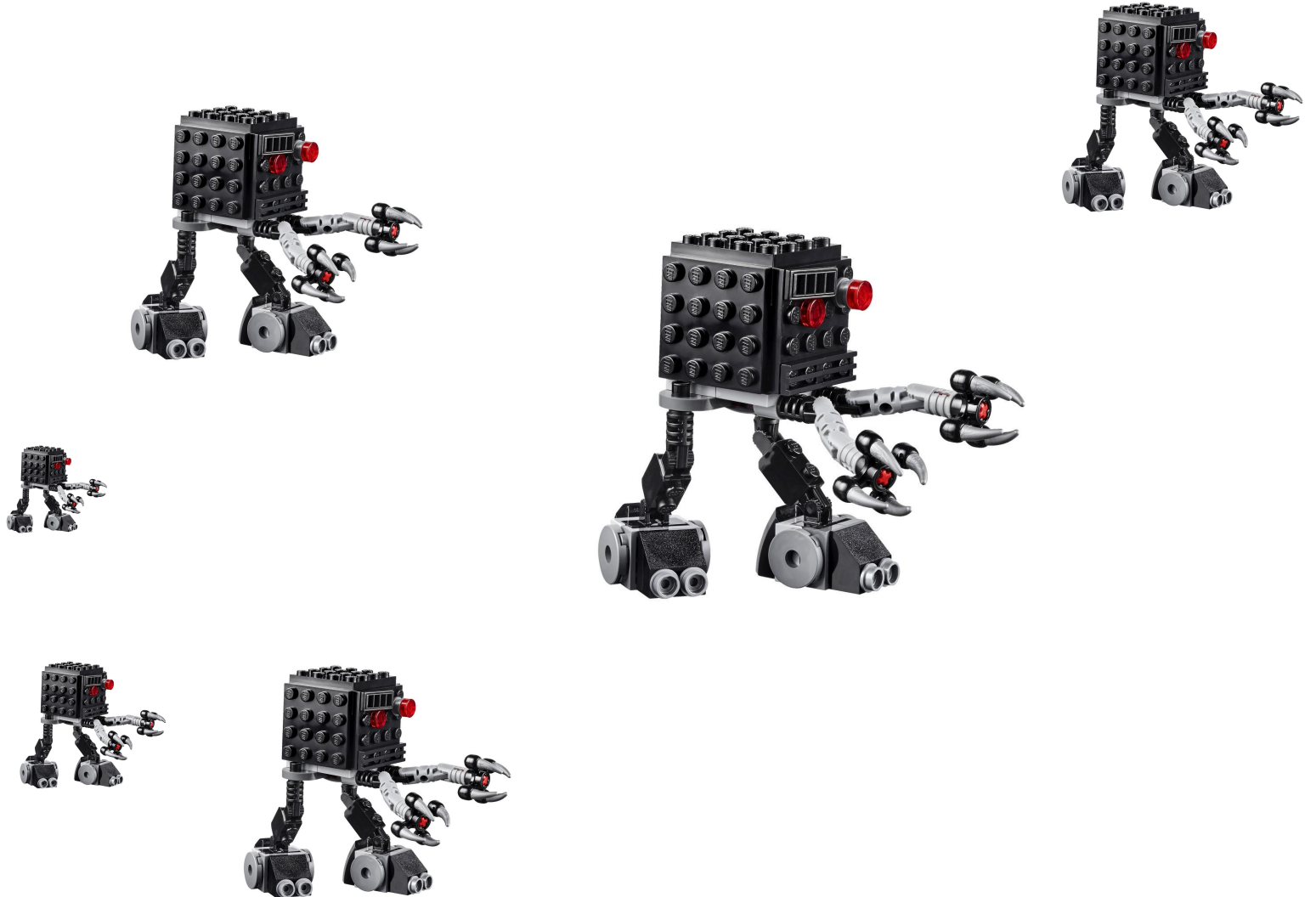
Man OOLC Workshare In Stacks Searching X

Drag a column header here to group by that column.

Creation Date	Transaction Date	Trans...	Photo Journal Title	Qled Title	Location	Call Number	Photo Article Title
4/19/2014 8:51 PM	4/23/2014 12:38 PM	759816	Interview to talk = Architecture and urban...		Architecture Reading Room, 5th...	NA1123.B4 B3 1978	General Electric Building (originally RCA Victor Building), 570 Lexin...
4/22/2014 11:26 AM	4/22/2014 7:46 AM	750772			Architecture Reading Room, 5th...	NA1123.B4 B3 1978	
4/22/2014 12:35 AM	4/22/2014 7:46 AM	750945	Handbook of methods in cultural anthropology /		Brd-3rd Floor	GN4H5 .J4566 1998	Behavior Observations in Ethnography
4/22/2014 12:55 AM	4/22/2014 8:08 AM	750946	Track & field news.		Brd-3rd Floor (does not circulate)	GV1060.5 .T759	Jon Hendershot; Beth Bonner Pioneers Sub-3 Hour Marathon
4/22/2014 9:54 AM	4/22/2014 11:05 AM	751021			Brd-2nd Floor	DD66.7 .F47 A313 2014	
4/22/2014 11:17 AM	4/22/2014 1:10 PM	751048			Brd-2nd Floor	BP163 .J9365 1997	
4/22/2014 9:46 PM	4/22/2014 4:16 PM	751178			Brd-2nd Floor	BP592.P323 W43 1997	
4/22/2014 10:58 AM	4/23/2014 11:15 AM	751343			Brd-5th Floor	PS310.M67 P67 2011	
4/23/2014 10:56 AM	4/23/2014 11:32 AM	751353	Kansas history.		Brd-3rd Floor (does not circulate)	F676 .K3321	A HOLY BATTLEGROUND; METHODIST, BAPTIST, AND QUAKER M...
4/23/2014 11:49 AM	4/23/2014 12:20 PM	751372	The economist.		Brd-3rd Floor (does not circulate)	H211 .E19	Nazi Propaganda
4/23/2014 2:54 PM	4/23/2014 3:07 PM	751444			Brd-4th Floor	ND3363.A1 B67 2013	
4/23/2014 4:27 PM	4/25/2014 9:12 AM	751472			Architecture Reading Room, 5th...	NA1123 .B38 2011	
4/23/2014 5:39 PM	4/23/2014 6:14 PM	751487			Brd-5th Floor	PS3515.A944 B66 1957	
4/23/2014 9:49 PM	4/23/2014 6:14 PM	751490			Brd-5th Floor	PN4960.L53 R3 OVERSIZE	
4/23/2014 7:21 PM	4/24/2014 8:16 AM	751500	Human Communication Research		Brd-5th Floor (does not circulate)	P91 .3 .J485	SOME EXPLORATIONS IN INITIAL INTERACTION AND BEYOND; T...
4/24/2014 2:29 AM	4/24/2014 8:16 AM	751526			Brd-4th Floor	HM656 .S53 2014	
4/24/2014 9:14 AM	4/24/2014 9:32 AM	751556	Mujamas = Mujamas.		Brd-4th Floor	N6260 .M83	VISUAL COSMOPOLITANISM AND CREATIVE TRANSLATION; ARTI...
4/24/2014 9:45 AM	4/24/2014 11:47 AM	751573	In the meantime ; temporality and cultural po...		Brd-4th Floor	HM656 .S53 2014	Introduction; Tempo Tantrums; Chapter 1; Jet-Lag Luxury

Future Development: The Rules are Multiplying!

- Build more rules to help manage your workflow—some rules big, some small.
- Will need input on priorities of rules to build.



If you want a unicorn, you might have to pay for it.

- It's not that IDS Logic can't build unicorns, it's just that everyone can't benefit from unicorns.
- Custom dev. that will benefit only your workflow can be contracted.



How we will develop.

- Logic can't turn back time yet.
- We'll need to prioritize rules, services, and projects.
- Members will be asked for ideas on rules and those that can be developed and have the most impact will be chosen.



We'll try to build rules that everyone can benefit from based on the principles of the Workflow Toolkit.



IDS PROJECT

A unified community of trust and support built around a critical and clearly understood purpose: effective resource sharing.

trust support sharing unified community people support sharing people

Workflow Toolkit Links

[Download Full Workflow Toolkit](#)

Intro Materials

[Quick Reference](#)
[Notes from Your Library Visit](#)
[Collaborative Technologies](#)

Borrowing

[Buy vs. Borrow](#)
[Copyright](#)
[Custom Holdings](#)
[Direct Request](#)
[Email Notifications](#)
[Lender Address Maintenance](#)
[Odyssey Trusted Sender](#)
[Patron Authentication](#)
[Web Circulation](#)

Document Delivery

[Delivering Items in Your Physical Collection](#)
[Delivering Locally Held E-Journal Articles](#)

Lending Best Practices

[Article Exchange](#)
[Effective Billing: IFM & Billing Manager](#)
[Lending E-Journal Articles](#)

Workflow Toolkit


Truly effective resource sharing depends upon each library running at peak efficiency. The goal of the Workflow Toolkit is to help ILL staff implement best practices that will save valuable turnaround time, while also cutting the costs of doing business. Maintained by the IDS Project's Mentors, in partnership with Atlas Systems, the Toolkit provides best practices that can enhance all aspects of borrowing, lending, and document delivery services through ILLiad customizations, resource sharing strategies, and workflow improvements.

Join the conversation on WorkflowToolkit-L

The IDS Project is proud to host the WorkflowToolkit-L listserv, the ILLiad community's hub for sharing news, support, ideas, and best practices. [Sign up today](#) and [join the conversation](#)!

Get the Toolkit

The Workflow Toolkit is available from the [IDS Project Press](#) as a downloadable PDF. View it on your PC or tablet, though we highly recommend printing it for use in a 3-ring binder. This will allow you to bookmark sections, take notes, and complete the planning activities through the Toolkit. New sections will be released as loose leaf updates, allowing you to easily keep your Toolkit up-to-date.



IDS LOGIC

IDS Logic Rulekit Links

Workflow Documentation

[Lending Availability Service](#)
[Lending Availability Service Preparation](#)

Logic Rules

[Article Copyright Query](#)
[Book Chapter Availability Lookup](#)
[Borrowing Loan Renewal OK](#)
[Borrowing Loan Renewal Denied](#)
[Custom Transaction Router Emailer](#)
[Lending Availability Service](#)
[Lending Site Switcher](#)

IDS Logic Rulekit

What is IDS Logic?

IDS Logic is a service that helps automate ILL workflows for libraries using ILLiad. IDS Logic creates a connection to a library's ILLiad database through a Server Addon, which communicates with the IDS Logic service. IDS Logic can help improve and automate ILL workflows by:

- Performing automated actions on ILL requests based on complex criteria executed through server-based rules.
- Sending automated notifications to patrons regarding ILL transactions.
- Automating time consuming steps in ILL that require making decisions on information that is contained in the ILL transaction compared to ILL policies or settings.
- Conducting automated searches of internal library services such as the catalog (via the Z39.50 server) with information contained in ILL transactions to automate time consuming steps such as looking up call numbers for book chapter or loan requests, or cancelling checked out items or items from restricted collections.

Toolkit, meet Rulekit.

Toolkit is to Ipod as Rulekit is to Iphone



Logic is a platform that will continue to be built upon to facilitate the most effective resource sharing possible through ILLiad automation.



3/4/2014 11:48 AM	Awaiting Renewal OK Processing	System
3/4/2014 11:49 AM	Checked Out to Customer	System

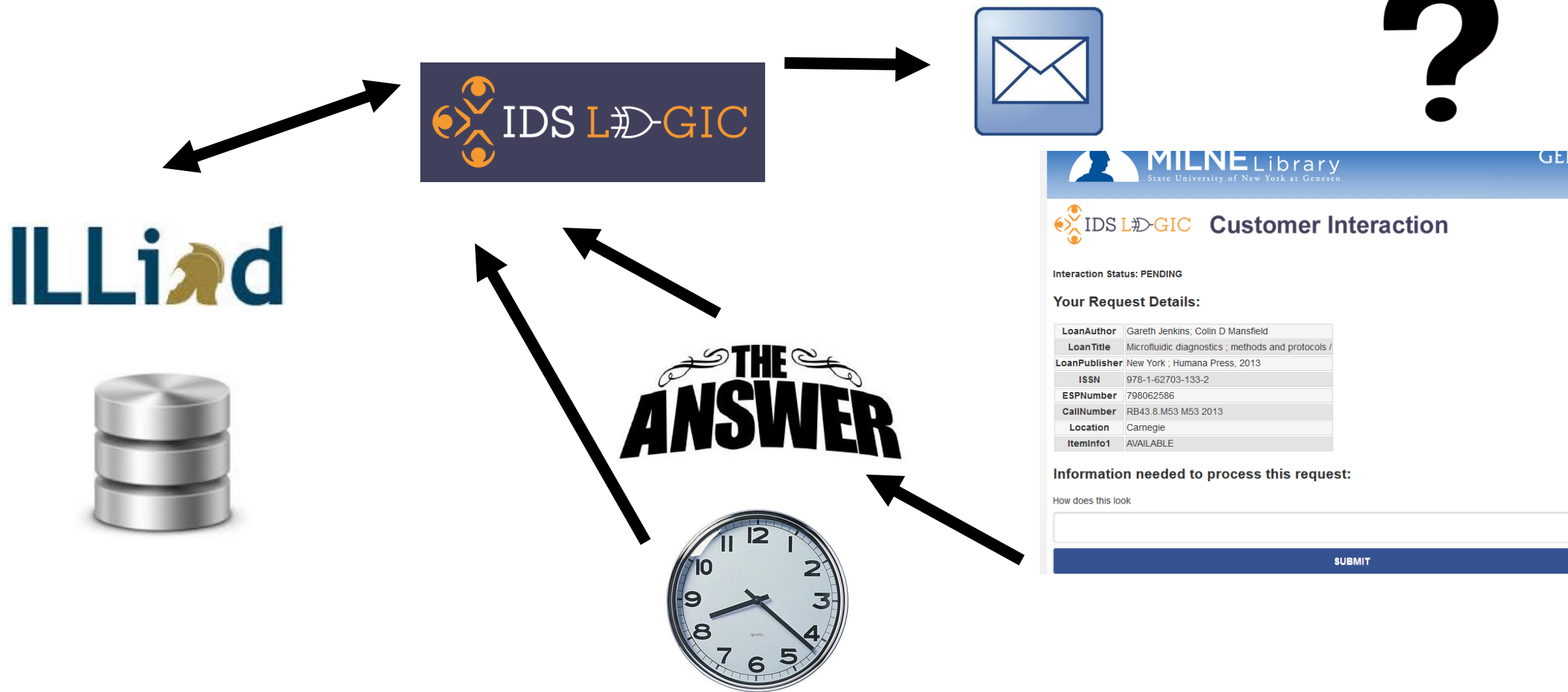
432624	733398	3/4/2014 11:49 AM	Transaction	733398	"ILLiad System" <ill@syr....
--------	--------	-------------------	-------------	--------	------------------------------

Future Developments: Textbook Sniffer.

- Ability to exclude textbooks from direct request and automatically cancel or route for purchase.
- Offer consortial textbook detection.
- Find variations of ISBNs for textbooks.
- Estimated rollout—6 mos.



Future Developments: Patron Interaction



Future Developments: a New Dashboard

- TPAM will be improved and re-released as Dashboard using Logic as the method for gathering data.
- Dashboard releasing in next 6 -9 months



Future Developments

- More is planned, dependent on development time available.
- IDS Members will be asked to install Logic Addon this Summer.
- Come to the conference and let us know what to build.

