

# Introduction to the Workflow Toolkit

By: Tim Bowersox

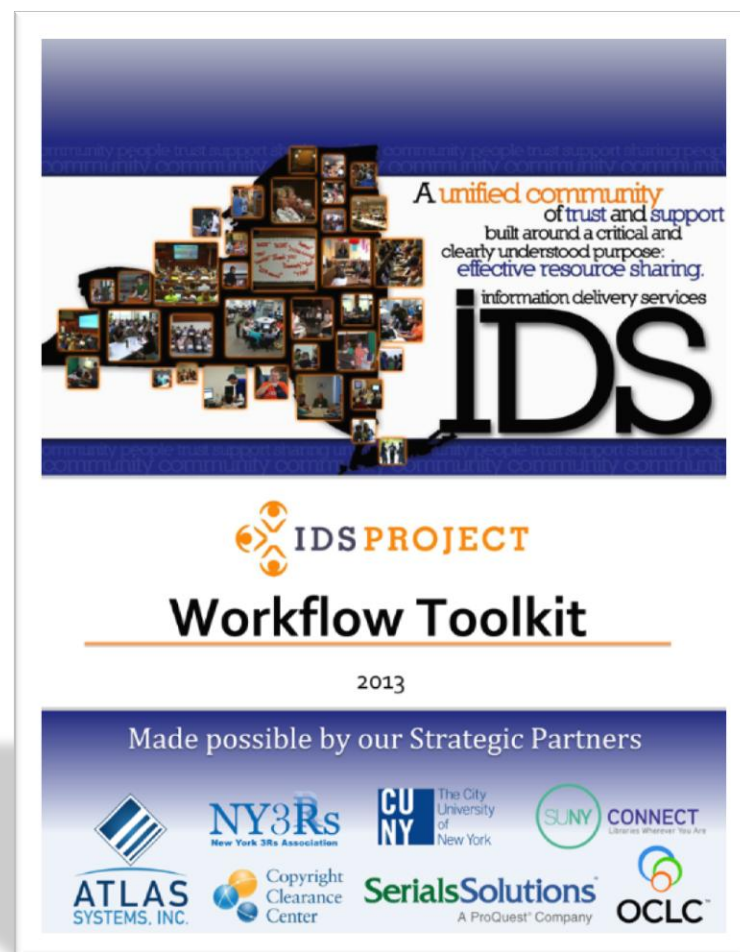
Access Services Librarian, SUNY Geneseo

# A compendium of customizations!

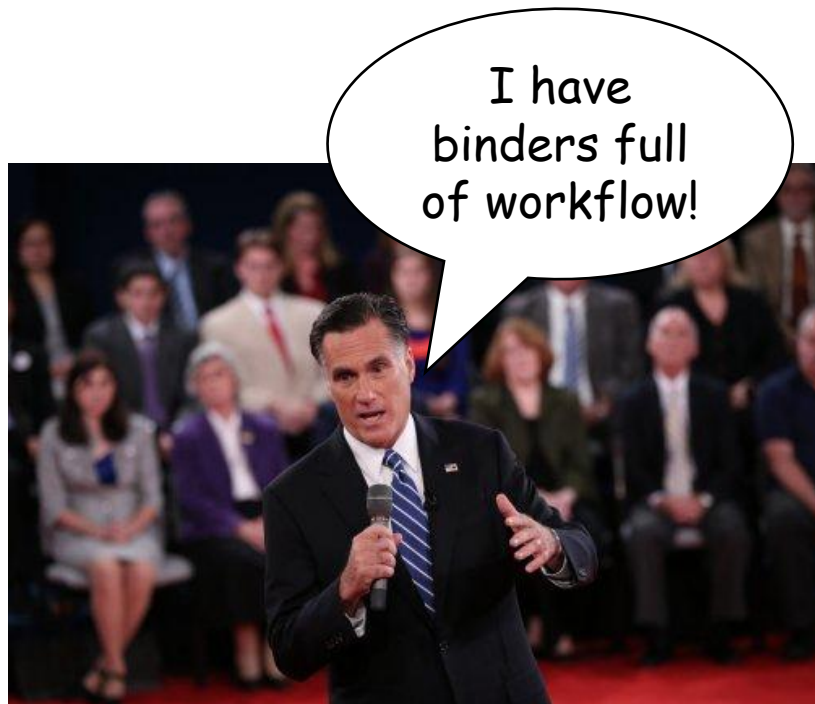
- How-to's
- Best practices
- Routing rules
- Email routing
- Templates
- Addons

Online at:

<http://toolkit.idsproject.org>



# Three rings of success



- Built to be bound
  1. Bookmark best practices you want to implement.
  2. Use the guided activities & take notes
  3. Loose leaf updates keep your binder smelling fresh

# Beyond the binder

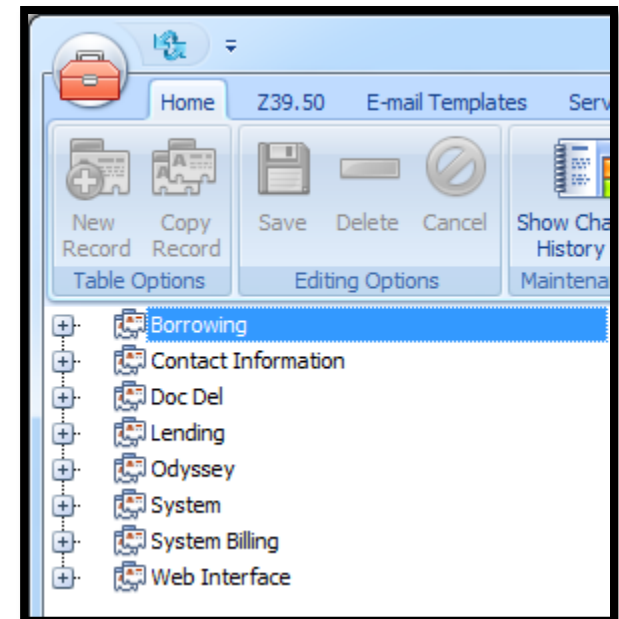
- WorkflowToolkit-L is a hub of the ILLiad user community
  - Help and advice are just an email away
  - Keep in the loop about Toolkit updates, ILLiad releases, & IDS Project news
  - Share your expertise and new ideas
- IDS Project Regional User Groups
  - Toolkit-centered workshops
  - Facilitated by IDS Project Mentors
  - Learn with (and from!) your fellow Projecteers

# Before you begin

What you need to know to get the most from the Toolkit

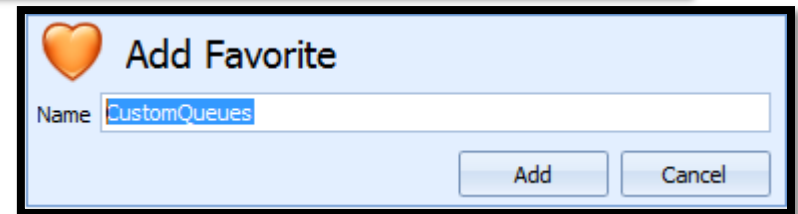
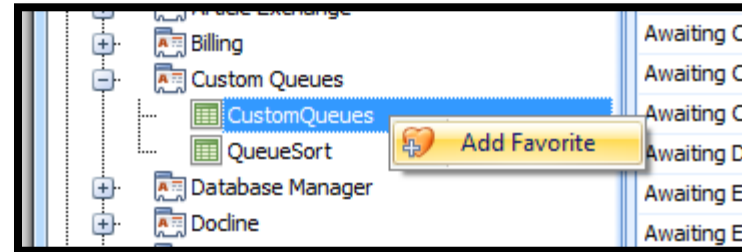
# Customization Manager

- Where the magic happens
  - Most Toolkit entries focus here
  - Becoming familiar with certain parts will help get you started
- Where is it?
  - It's the red toolbox shortcut installed along with the ILLiad client
  - Can't get in? Your ILLiad admin can give you access via the Staff Manager

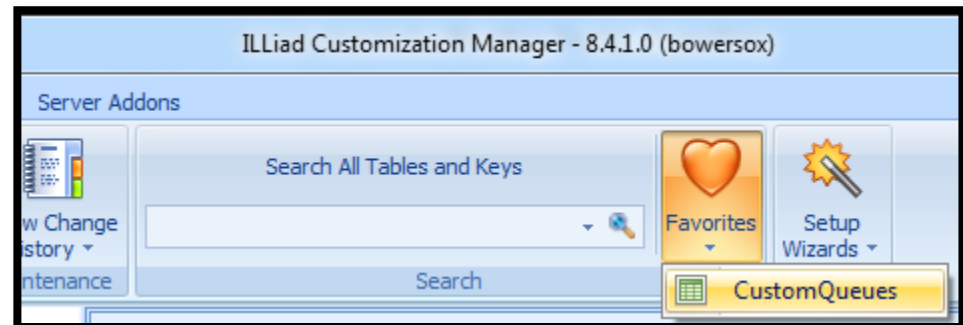


# Customization Manager

- Bookmark your favorites
  - This makes it easier to access oft-used settings
  - Simply right click on a table or setting and click “Add Favorite”

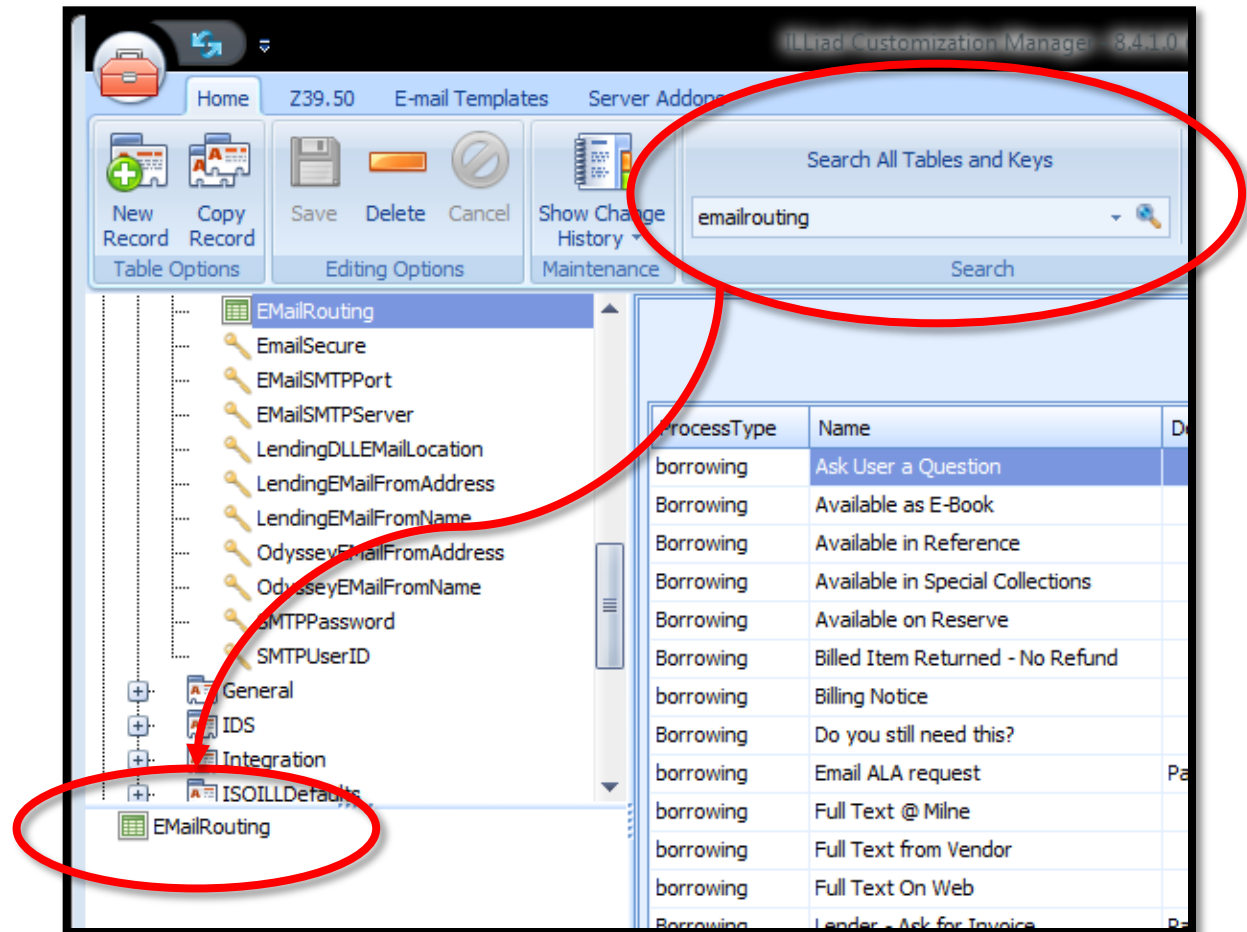


- Access your favorites from the Favorites button in the ribbon



# Customization Manager

- Some settings can be hard to find
- Try using the Search feature to find a setting by name





# Customization Manager

- When editing key values, you can undo changes.
- Just double-click on the old setting you wish to restore.

## LendingDueDateDays

**Settings**

Key Value  
90

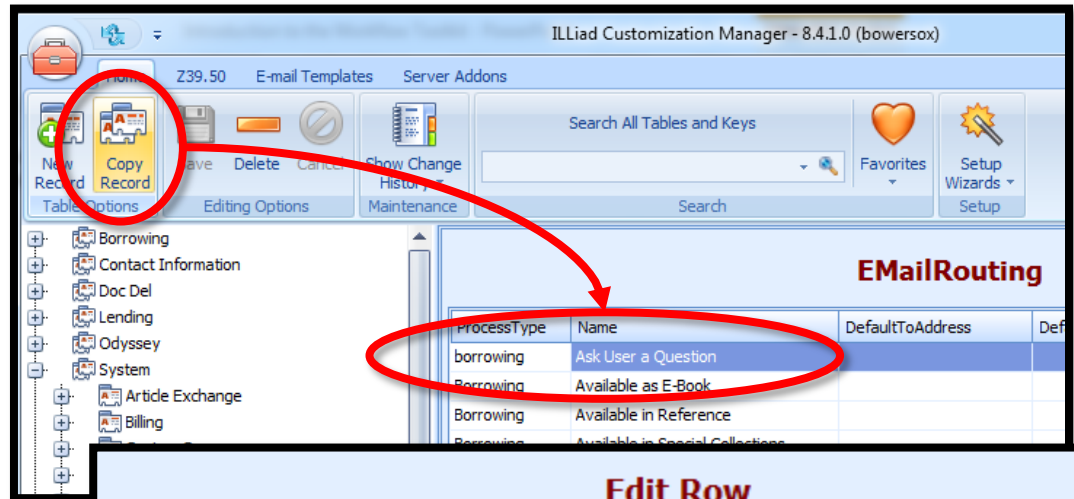
Description  
The default number of days to add to today's date when calculating the default due date on Lending returnables.

Value Changed From	Value Changed To	Changed Time	Changed By
45	90	11/18/2011 2:25 PM	bowersox
30	45	12/22/2010 1:21 PM	bowersox

Double-click a tracking row to revert to the previous value.

# Customization Manager

- When editing tables, save time by copying records



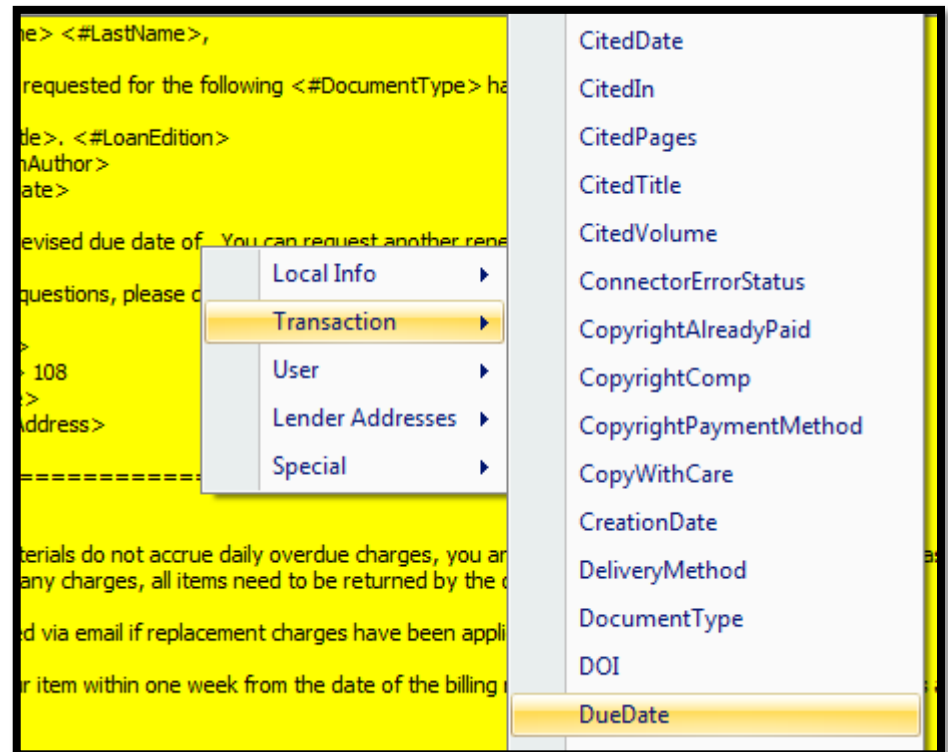
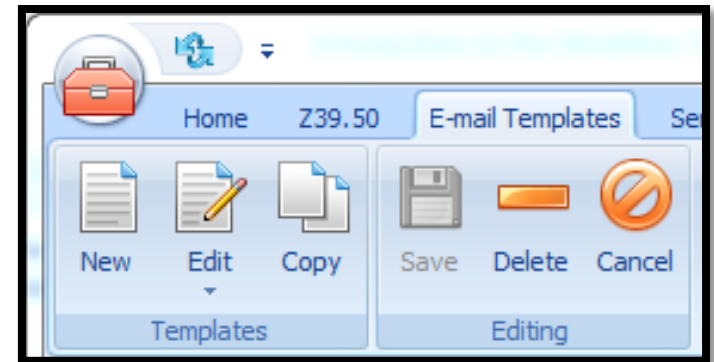
- This will spare you from retyping the same values

Edit Row	
ProcessType	borrowing
Name	Ask User a Question
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Question regarding your IDS request for "<#LoanTitle><#PhotoArticleTitle>"
DefaultFromAddress	ids@geneseo.edu
DefaultFromName	Milne Library IDS
DefaultStatus	Awaiting Response from User
FileNameLoan	Note
FileNameArticle	Note
NVTGC	ILL

# Customization Manager

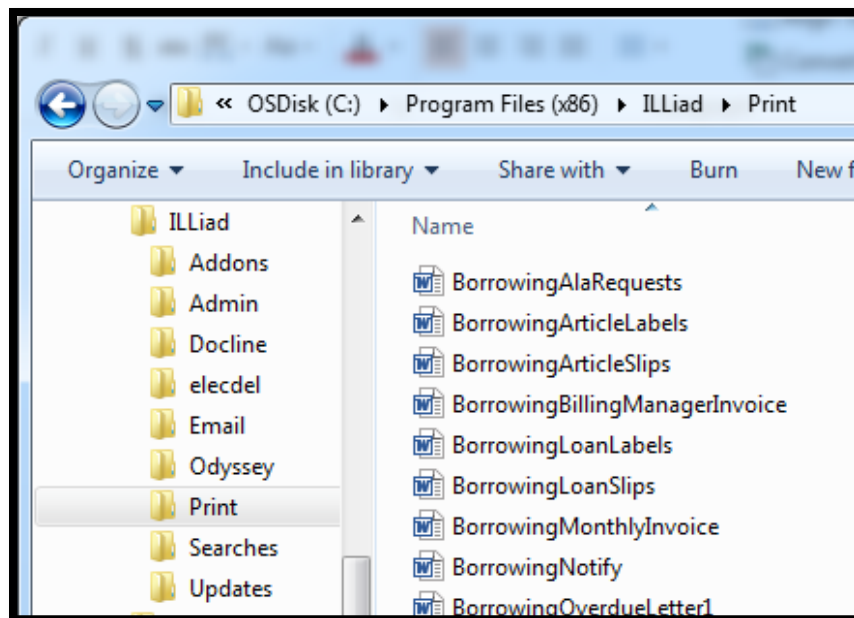
- Email templates are now stored in the Customization Manager
  - Edit default or custom emails
  - Create new templates

- Right-click in a template to insert a field tag



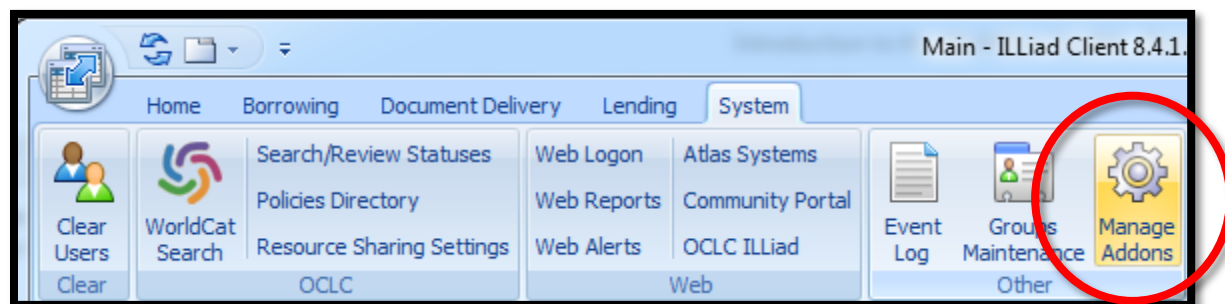
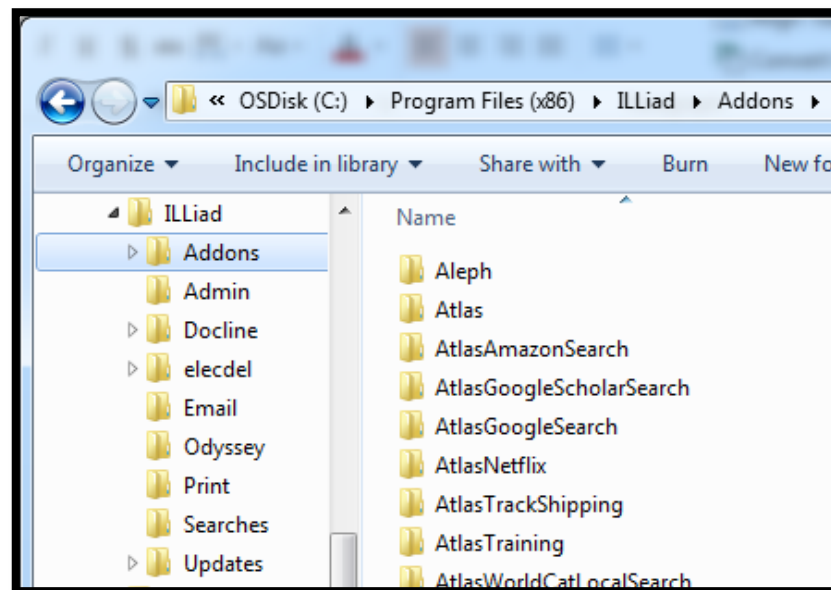
# Print templates

- By default, each workstation uses its own set of print templates
- These can be found in:  
**C:\Program Files (x86)\ILLiad\Print**
- Print templates can only be edited in MS Word



# Addons

- By default, each workstation has its own addons directory
- This can be found in **C:\Program Files (x86)\ILLiad\Addons**
- When downloading a new addon, extract it here
- Addons are configured in the ILLiad client



# Where to begin

High-impact best practices

# Borrowing

1. ALIAS, Direct Request for Articles, and/or RapidILL
2. Copyright Rule of 5 bypass (routing rule)
3. Odyssey Trusted Sender
4. Direct Request for Loans
5. Custom Holdings

# Lending

1. Article Exchange
2. Odyssey Helper
3. Serials Solutions or SFX addons w/ ALIAS
4. IFM Billing
5. Invoice borrowing library (Email Routing & Custom Queue)



What's next?

# Stay tuned!

- Priorities for the months ahead:
  - The Toolkit will be updated to reflect the latest improvements to ILLiad
  - More shout outs to Atlas' documentation and expanding video library
  - Continued improvements to the layout
- Feedback always welcome!
  - [Bowersox@geneseo.edu](mailto:Bowersox@geneseo.edu)

Questions?

# Thank you!

<http://toolkit.idsproject.org>