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

I have binders full of workflow!
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.
Customization Manager

- When editing tables, save time by copying records
- This will spare you from retyping the same values
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
Questions?
Thank you!

http://toolkit.idsproject.org