IDS Logic

Development Update

Bill Jones and Michael C. Mulligan
A New Era of Workflow
How workflow may/may not improve with Apple Watch
● Rulekit
  ○ Our collection of custom rules for workflow
  ○ Based on trends of custom rules requested
Rulekit

- Borrowing Loan Due On Shelf (10/2014)
  - Checks for items waiting to be picked up
  - Adds a flag indicating which items need to be sent back
  - Optional email notifies patron that item was returned
Rulekit

- Borrowing Loan Renewal OK (1/2014)
  - Adds new due date
  - Emails patron
  - Routes back to “Checked Out To Customer”

- Borrowing Loan Renewal Denied (1/2014)
  - Adds new due date
  - Emails patron
  - Routes to specified queue
● Rulekit
  ○ Borrowing Loan Delay Received (6/2014)
    ■ Looks in “In Transit to Pickup Location”
    ■ Waits based on minutes in configuration
    ■ Routes to “Awaiting Customer Contact”
Rulekit
  - Borrowing Stale Unfilled Flagger (8/2014)
    - Looks for TNs created 7 days ago
    - Adds flag
    - Routes to custom status
    - Emails patron
• Rulekit
  ○ Lending Expiring Soon (3/2015)
    ■ Looks in “Awaiting Stacks Searching”
    ■ Checks if created more than 3 days ago
    ■ Adds flag
    ■ Routes to custom status
    ■ Adds note
    ■ Adds custom text for pull slips
Rulekit

- Loan Pickup Reminder 1 & 2 (10/2014)
  - Looks in “Customer Notified by E-Mail”
  - Waits the number of days set in config
  - Sends patron a reminder email
  - Has 2 stages (New)
    - First reminder
    - Second reminder (for the final countdown)
Rulekit

- Long Overdue Check Shelves (8/2014)
  - Checks for items long overdue
  - Adds custom flag
  - Routes to custom queue
  - Emails borrowing library
● Logic Services
  ○ More advanced and complex rules
    ■ Often several rules that work in tandem
  ○ Usually utilize external data sources
    ■ Utilize external API and services to pull in information for updating TNs and streamlining workflow
ILLiad Server Addon

- Available (get from shelf)
- No Results (move for review)
- Unavailable (cancel transaction)

Z39.50
ALIAS
OCLC APIs
● Logic Services
  ○ Lending Loan Availability Service
    ■ Looks at loan requests in lending
    ■ Pulls in loan availability from local catalog
    ■ Routes to new status based on availability
    ■ Cancels OCLC request if unavailable
Logic Services

- Lending Book Chapter Availability Service
  - Looks at article requests in lending
  - Identifies article requests with ISBN
  - Pulls in loan availability from local catalog
  - Routes to new status based on availability
  - Cancels in OCLC if unavailable
Logic Services

- Borrowing Loan Availability Service
  - Looks at loan requests in borrowing
  - Pulls in loan availability from local catalog
  - Routes to new status based on availability
    - Has the option to route to Doc Del
Logic Services

- Book Chapter Direct Requester
  - Looks at article requests in borrowing
  - Identifies article requests with ISBN
  - Searches OCLC for potential lenders
    - Fills in the lending string
  - Routes to “Awaiting OCLC Sending”
● Logic Services
  ○ Direct Request Enhancer - In Beta!
    ■ Looks at loan requests in borrowing
    ■ Identifies requests that failed direct request
    ■ Searches OCLC for most relevant alt. edition
      • Starts with item with the most holdings
    ■ Routes to “Awaiting Direct Request Sending”
  ○ Ask #theBillJones for details!
● Logic Services
  ○ ALIAS V2.0
    ■ Looks at article requests in borrowing
    ■ Searches ALIAS holdings database for lenders
      ● Fills in the lending string
      ● Now has the ability for lenders to deflect requests *(New)*
        ○ Journal / Journal Collection / Journal Provider
      ● Routes to “Awaiting OCLC Sending”
    ■ ALIAS DB is indexed weekly
      ● We can now import MaRC files for prints
Logic Services

- Custom Logic Rules
  - Custom Ad-Hoc workflow rules
  - Highly configurable
    - Search Request Type
    - Search Process Type / Change Process Type
    - Search Status / Change Status
    - Search Flags / Add Flags
    - Custom Query (more than 250 characters)
    - Send Emails
What’s Next?
• IDS Central
  ○ Communication embedded into ILLiad Main Form
    ■ IDS Chatrooms and IDS Forums
    ■ Popular ILL Bookmarks
    ■ Conference registration
    ■ News / Twitter feeds

• IDS Batch Processing
  ○ Run IDS Logic Services on many requests at once
    ■ Streamlined article batch processing with 1 tab
THE IDS AddOn

- Smarter Monolithic Transaction Addon
  - Only 1 Addon tab per request
  - Changes behavior based on process type
  - Changes behavior based on request type
● IDS System AddOn
  ○ Deliver our NCIP Addon with a switch
● Logic Rules based on events
  ○ What events?
Borrowing Accept Item

Borrowing Check In Item
Lending Check In Item

Lending Check Out Item
IDS Custom CSS
  ○ CSS configured and delivered by IDS

IDS Custom JavaScript
  ○ JavaScript configured and delivered by IDS

Smarter web request forms
  ○ Auto-complete search within TN request form
  ○ Notify user if article/loan is available before submit
  ○ Install GIST with the flip of a switch
● Contact us
  ○ #theBillJones
  ○ logic@idsproject.org

● Join the next session
  ○ IDS Logic: Help Us Help You
    ■ Bill Jones & Michael C. Mulligan