ASK ATLAS
Ask Atlas

Heather Black, John Brunswick, Kevin Ford, Kerry Keegan, Stephanie Spires
Agenda

• **Print Filters** with Heather Black

• **Addons** with John Brunswick

• **Database Projects** with Kevin Ford

• **Routing Rules** with Kerry Keegan
Ask Atlas: Heather Black

PRINT FILTERS
Filtering Print Jobs

Are you printing too much?

Print Only What You Need!
Filter out records to print based on values in the ILLiad record.
Examples

Address labels for USPS delivery only.
Print different templates for different requests.
Example

Distance Ed Home Delivery

Hall, Don
TN: 1990
University ID: 203948
Phone: 878-288-2983
dhall@poetyssymposium.org

Title: Keynotes /
Author: Egerton, George, 1859-1945.

DUE DATE: 1/1/2017

Distance Ed Home Delivery

Hall, Don
TN: 2374
University ID: 203948
Phone: 878-288-2983
dhall@poetyssymposium.org

Title: The moral intelligence of children /
Author: Cole, Robert.

DUE DATE: 1/1/2017

Humboldt State University
Don Hall
456 County Rd 228
Windham, NH 02883

Distance Ed Labels
<table>
<thead>
<tr>
<th>Courier Labels</th>
</tr>
</thead>
<tbody>
<tr>
<td>2138</td>
</tr>
<tr>
<td>2129</td>
</tr>
<tr>
<td>2133</td>
</tr>
<tr>
<td>2155</td>
</tr>
<tr>
<td>2207</td>
</tr>
<tr>
<td>2225</td>
</tr>
<tr>
<td>2226</td>
</tr>
<tr>
<td>2227</td>
</tr>
</tbody>
</table>
How To Configure

1. Identify the Template
2. Add the Filter
3. Configure on each computer
Filter Syntax

Table Name: LenderAddresses_DefaultShippingMethodLoan
Field Name
Field Value: 'COKAMO'

**OPERATOR**

- **=** Print those records with this value
- **<>** Exclude those records with this value
- **OR** Print those records with either value
Ask Atlas: John Brunswick

ADDONS
ILLiad Addons

• What is an addon?
  • An addon is a feature that extends the use of the client or the system as a whole
    • Adds functionality
    • Allows for increased automation
    • Helps streamline workflow processes
    • Better, faster, stronger
  • Addons are written in Lua script and stored on the local client machine or in the Customization Manager
  • Addon code can be modified as situations or systems change
ILLiad Addons

• What kinds of addons are there?
  • Client addon
    • Relies on action by staff, live on the local client machine
      • Google
      • Powell’s
  • Server addon
    • Runs in the background, lives on the server
    • Accessed through the ILLiad Customization Manager
      • Twilio SMS Notifications
      • Electronic Delivery Reminder Addon
**General Request Information**

- **Transaction Number**: 1174
- **Username**: JohnB
- **Transaction Date**: 9/15/2016 1:54 PM
- **Delivery Method**: Hold for Pickup
- **Service Level**: Regular
- **Billing Account**: Doc Type
- **Article**: Scarlett: the sequel to Margaret Mitchell's Gone with the wind / Ripley, Alexandra.
- **Publisher**: Ripley, Alexandr
- **Place**: Site
- **Article Info**: Loan
- **Loan Info**: 05/12/2015
- **OCLC Information**: 144792458
- **OCLC Number**: 23070219
- **Lending String**: TRNA
- **System**: System
- **System ID**: OCLC
- **OCLC Status**: Record not found

**Item Information**

- **Call Number**: 
- **Location**: 
- **Due Date**: 
- **Reason For Cancellation**: 
- **Item Num/Ref Num**: 
- **ISXN**: 
- **Special Instructions**: 
- **Max. Cost/Pieces**: 

**Citation Information**

- **Cited In**: 
- **Title**: 
- **Date**: 
- **Volume/Pages**: 

**Awaiting Request Processing**

- **3/20/2015 12:34 AM**: Checked out
- **3/13/2015 3:43 PM**: Check out to John B.
- **3/16/2015 11:56 PM**: TRNA: Checked out
<table>
<thead>
<tr>
<th>Name</th>
<th>Author</th>
<th>Version</th>
<th>Active</th>
<th>Last Updated</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twilio SMS Notifications Addon</td>
<td>Atlas Systems, Inc.</td>
<td>1.1.0</td>
<td>Inactive</td>
<td>10/27/2016 11:13 AM</td>
<td>Sends SMS Notifications using the Twilio API</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Value</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AccountSID</td>
<td></td>
<td>string</td>
<td>The Twilio Account SID provided in your Twilio account settings.</td>
</tr>
<tr>
<td>AuthToken</td>
<td></td>
<td>string</td>
<td>The Twilio AuthToken provided in your Twilio account settings.</td>
</tr>
<tr>
<td>FromNumber</td>
<td></td>
<td>string</td>
<td>A Twilio phone number enabled for the type of message you wish to send. Only phone numbers or short codes purchased from Twilio work here.</td>
</tr>
<tr>
<td>ActiveNVTGC</td>
<td></td>
<td>string</td>
<td>If shared server, a comma separated list of NVTGCs that use this addon for sending SMS notifications. This setting is ignored for single server instances.</td>
</tr>
</tbody>
</table>
ILLiad Addons

• What addons are available?
  • To find the Addon Directory go to the Atlas Systems Product Documentation page
  • Click on Atlas Addons under Site Spaces on the left side of the page
  • Under Popular Topics click on ILLiad Addon Directory
    • From there select the addon you are interested in to download it
    • Client addons are downloaded and unzipped to the Addons folder on the local client machine, for example C:\Program Files (x86)\ILLiad\Addons
    • Server addons are saved somewhere local and then imported into the Customization Manager
Popular Topics

1. ILLiad Addon Directory
2. Atlas Addons
3. ILLiad A-Z DocDel by Reprints Desk Addon
4. Addon Technical Details
5. Creating Addons
6. Installing Addons
7. Addon Directory
8. ILLiad EBSCO Publication Finder Addon
9. Client Addons
10. Installing and Configuring Ares Server Addons

Default Addons

- Amazon Book Searches (ILLiad)
- Atlas Training (ILLiad)
- Google Scholar Search (ILLiad)
- Google Search (ILLiad)
- Shipment Tracking (ILLiad)
- Amazon Book Searches (Ares)
- GOBI Addon (Ares)
- Hathi Trust Catalog (Ares)
Addons with * are included with default ILLiad installations.

- *ILLiad Amazon Book Searches Addon
- *ILLiad Atlas Training Addon
- *ILLiad Google Scholar Search Addon
- *ILLiad Google Search Addon
- *ILLiad Shipment Tracking Addon
- ILLiad 360Core Search Addon
- ILLiad Aleph Catalog Addon
- ILLiad Alibris Book Searches Addon
- ILLiad Alma NCIP Borrowing Renewal
- ILLiad ALMA NCIP Client Addon
- ILLiad Alma NCIP Lending Only Addon
- ILLiad Aquatic Commons Search Addon
- ILLiad A-Z DocDel by Reprints Desk Addon
- ILLiad Barnes & Noble Addon
- ILLiad Better World Books Addon
- ILLiad Bing Addon
- ILLiad Bing Images Addon
- ILLiad BL on Demand Addon
- **ILLiad BN College Textbook Search Addon**
- ILLiad CCC GetItNow Service Addon
- ILLiad Clipboard Wizard Addon
- ILLiad Clusty Addon
- ILLiad Document Addon
ILLiad BN College Textbook Search Addon

updated by Caitlin Ankney (Mar 18, 2016)

<table>
<thead>
<tr>
<th>Name</th>
<th>BN College Textbook Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version</td>
<td>1.2</td>
</tr>
<tr>
<td>Author</td>
<td>Logan Rath, IDS Project</td>
</tr>
<tr>
<td>Description</td>
<td>The BN College Textbook Search addon does an ISBN or Title search. ISBN will be run if one is available.</td>
</tr>
</tbody>
</table>

Download

Download zip file: BNCollege.zip

Configuration

Addon settings are configured in the Manage Addons form.

<table>
<thead>
<tr>
<th>Name</th>
<th>Default</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AutoSearch</td>
<td>true</td>
<td>Boolean</td>
<td>Defines whether the search should be automatically performed when the form opens.</td>
</tr>
<tr>
<td>BookstoreURL</td>
<td></td>
<td>String</td>
<td>The URL for your bookstore xxxx.bncollege.com/. Only the part before .bncollege.com (e.g. brockport)</td>
</tr>
<tr>
<td>StoreID</td>
<td></td>
<td>String</td>
<td>Store ID from the URL String on bookstore’s main page.</td>
</tr>
<tr>
<td>Name</td>
<td>Date Modified</td>
<td>Type</td>
<td>Size</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------</td>
<td>--------------</td>
<td>------</td>
</tr>
<tr>
<td>Atlas</td>
<td>9/20/2016 3:34 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>AtlasAmazonSearch</td>
<td>9/20/2016 3:34 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>AtlasGoogleScholarSearch</td>
<td>9/20/2016 3:34 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>AtlasGoogleSearch</td>
<td>9/20/2016 3:34 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>AtlasTrackShipping</td>
<td>9/20/2016 3:34 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>AtlasTraining</td>
<td>9/20/2016 3:34 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>AtlasWorldcatLocalSearch</td>
<td>9/20/2016 3:34 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>CCC</td>
<td>3/10/2013 3:04 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>Discovery</td>
<td>10/27/2016 9:39 AM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>Innovative</td>
<td>3/18/2013 9:58 AM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>NLMAutoFill</td>
<td>3/19/2013 1:22 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>OCLCAE</td>
<td>5/7/2013 2:27 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>Powells</td>
<td>3/17/2013 11:32 AM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>SerialsSolutions_ALIAS</td>
<td>9/7/2012 3:21 PM</td>
<td>File Folder</td>
<td></td>
</tr>
<tr>
<td>LocalSettings</td>
<td>10/27/2016 9:48 AM</td>
<td>XML Document</td>
<td>4 KB</td>
</tr>
</tbody>
</table>
ILLiad Addons

• Where do I configure Addons
  • Server Addons are configured in the Customization Manager
    • You need access to the Customization Manager, assigned in the Staff Manager
  • Client Addons are configured in the Client
    • You need permission to Manage Addons, assigned in the Staff Manager
<table>
<thead>
<tr>
<th>Name</th>
<th>Author</th>
<th>Version</th>
<th>Active</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Book Searches</td>
<td>Atlas Systems, Inc.</td>
<td>1.1</td>
<td></td>
<td>Performs an Amazon search for the LoanTitle for loans.</td>
</tr>
<tr>
<td>CCC GetItNow Service</td>
<td>IDS Project</td>
<td>1.60</td>
<td></td>
<td>Performs a price lookup of the article using the CCC GetItNow Service.</td>
</tr>
<tr>
<td>Google Search</td>
<td>Atlas Systems, Inc.</td>
<td>1.1</td>
<td></td>
<td>Performs a generic Google search for the LoanTitle for loans and the PhotoArticleTitle for articles.</td>
</tr>
<tr>
<td>Innovative</td>
<td>IDS Project</td>
<td>1.0</td>
<td></td>
<td>Innovative Catalog</td>
</tr>
<tr>
<td>NLM Form</td>
<td>California Polytech...</td>
<td>1.2</td>
<td></td>
<td>Populates the NLM web form for an Inter-library loan request when you select &quot;Import Fields&quot; from the ribbon inside the Add-on.</td>
</tr>
<tr>
<td>OCLC Article Exchange</td>
<td>Atlas Systems, Inc.</td>
<td>1.6</td>
<td></td>
<td>Opens OCLC Article Exchange</td>
</tr>
<tr>
<td>Powells</td>
<td>IDS Project</td>
<td>1.1</td>
<td></td>
<td>This Addon does an ISBN or Title search. ISBN will be run if one is available.</td>
</tr>
</tbody>
</table>

**Setting Name**: AutoSearch, PriceField

**Type**: boolean, string

**Description**: Defines whether the search should be automatically performed when the form opens. Defines what field in the transactions table the price should be saved to.
ILLiad Addons

• What exactly does an addon do?
  • An addon is a feature that extends the use of the client or the system as a whole
  • Varies by the purpose of the addon
  • One quick example – Google Search Addon
    • Does a search in the background
    • Click on the Goggle Search tab, see the results
Scout: the sequel to Margaret Mitchell's Gone with the Wind

Scarlett
Novel by Alexandra Ripley
4/5 - Barnes & Noble
3/4 - Goodreads

Scarlett is a 1991 novel by Alexandra Ripley, written as a sequel to Margaret Mitchell's 1936 novel, Gone with the Wind. Wikipedia

Originally published: September 1991
Author: Alexandra Ripley
Adaptations: Scarlett (1994)
ISBN: 0-446-51507-8
Publisher: Grand Central Publishing
ILLiad Addons

• Please Note:
  • The client addon needs to be on each machine where you would like to use it
  • You do not need permission to Manage Addons in order to USE addons
  • Do not install more addons than you need, some do background searches and can slow performance if there are too many
ILLiad Addons

• However, addons can be very useful time-savers
• My suggestion is go over the list of addons
  • Managers, poll your staff
  • Staff, talk to your manager
• And, above all, remember if you do not like how an addon performs or if it ends up not being as useful as you thought it would be you can always uninstall it
Ask Atlas: Kevin Ford

DATABASE PROJECTS
The Wizard Behind the Curtain

• Reporting
  • Read Only Accounts
    • [https://prometheus.atlas-sys.com/display/illiad/Setting+up+the+SQL+Server+User+Account](https://prometheus.atlas-sys.com/display/illiad/Setting+up+the+SQL+Server+User+Account)

• Query design
  • Where is the data you want?
  • Where is it (tables/fields in the database)?
  • Do you have to link to anything?
  • What’s the proper syntax? (Many resources available online.)
  • How do you want the results to display?
The Wizard Behind the Curtain

• SQL Database

If it’s in the database, and you know a bit about what you’re doing, it can be queried/reported on/pulled out/acted upon.

Find the proper tables, fields, and linkages involved and design a **SELECT** query to pull the desired data.

• Transactions
• Users / UsersALL
• LenderAddresses / LenderAddressesALL
• Customization
• LocalInfo Table

Just be careful, back things up, make sure you know what you’re doing, and **ASK FOR ASSISTANCE** when you don’t.
The Wizard Behind the Curtain

• SQL Database

What am I looking for?

```sql
SELECT ut.OldUsername, ut.NewUsername, u.LastChangedDate,
       ROW_NUMBER() OVER(PARTITION BY ut.NewUsername
       ORDER BY u.LastChangedDate DESC) AS Position
FROM UsersTemp ut
JOIN UsersALL u ON u.Username = ut.OldUsername
WHERE ut.NewUsername IN
  (
    SELECT Distinct NewUsername
    FROM UsersTemp
    GROUP BY NewUsername
    HAVING COUNT(NewUsername) > 1
  )
ORDER BY NewUsername, Position, u.LastChangedDate
```
The Wizard Behind the Curtain

• SQL Database

```
Select ut.OldUsername, ut.NewUsername, u.LastChangedDate, 
    ROW_NUMBER() OVER(PARTITION BY ut.NewUsername 
    ORDER BY u.LastChangedDate desc) Position 
from UsersTemp ut 
Join UsersALL u on u.Username = ut.OldUsername 
where ut.NewUsername in 
( 
    Select Distinct NewUsername 
    from UsersTemp 
    Group By NewUsername 
    Having COUNT(NewUsername) > 1 
)
Order by NewUsername, Position, u.LastChangedDate
```
The Wizard Behind the Curtain

- SQL Database

```
SELECT ut.OldUsername, ut.NewUsername, u.LastChangedDate,
    ROW_NUMBER() OVER(PARTITION BY ut.NewUsername
    ORDER BY u.LastChangedDate desc) Position

FROM UsersTemp ut
JOIN UsersALL u ON u.Username = ut.OldUsername

WHERE ut.NewUsername IN
    (SELECT Distinct NewUsername
    FROM UsersTemp
    GROUP BY NewUsername
    HAVING COUNT(NewUsername) > 1)

ORDER BY NewUsername, Position, u.LastChangedDate
```
The Wizard Behind the Curtain

**SQL Database**

```
Select ut.OldUsername, ut.NewUsername, u.LastChangedDate,
     ROW_NUMBER() OVER(PARTITION BY ut.NewUsername
     ORDER BY u.LastChangedDate desc) Position
from UsersTemp ut
Join UsersALL u on u.Username = ut.OldUsername

where ut.NewUsername in
   (Select Distinct NewUsername
    from UsersTemp
    Group By NewUsername
    Having COUNT(NewUsername) > 1
   )

Order by NewUsername, Position, u.LastChangedDate
```

**Questions**

- What am I looking for?
- Where is it?
- What conditions or requirements apply to what I’m looking for?
- How should it display the results?
The Wizard Behind the Curtain

• Changing stuff (not for the timid)
  • Finding and Fixing “Dirty” Data
    • Examples:
      • Version Mismatches in Multi-site systems
      • Inconsistencies in Terminology and Naming
      • Odd Entries in Key Tables
      • Imposing Standard Values
      • Cleaning up old data
The Wizard Behind the Curtain

- Changing stuff (not for the timid)
  - Finding and Fixing “Dirty” Data
    - Examples:
      - Version Mismatches in Multi-site systems
      - Inconsistencies in Terminology and Naming
      - Odd Entries in Key Tables
      - Imposing Standard Values
      - Cleaning up old data

```sql
declare NVTGC_cursor cursor for
select distinct NVTGC, CustKey, Value
from Customization
where CustKey in ('VersionClient', 'VersionDLL')
order by NVTGC;

-- local variables to store NVTGC, CustKey, and Value
declare @NVTGC nvarchar(20);
declare @CustKey nvarchar(30);
declare @Value nvarchar(255);
PRINT('INFO: Checking Client and DLL Version');
PRINT('');

open E_cursor into @NVTGC, @CustKey, @Value;
BEGIN
  IF @NVTGC = 'ENT' THEN
    IF @CustKey = 'VersionClient' THEN
      IF '8.6.0.0' = (@Value) THEN
        PRINT('ENT Client Version: 8.6.0.0');
      ELSE
        PRINT('ENT Client Version: 8.6.0.0');
      END IF;
    END IF;
    IF @CustKey = 'VersionDLL' THEN
      IF '8.6.2.0' = (@Value) THEN
        PRINT('ENT DLL Version: 8.6.2.0');
      ELSE
        PRINT('ENT DLL Version: 8.6.2.0');
      END IF;
    END IF;
  END IF;
  IF @NVTGC = 'FED' THEN
    IF @CustKey = 'VersionClient' THEN
      IF '8.6.0.0' = (@Value) THEN
        PRINT('FED Client Version: 8.6.0.0');
      ELSE
        PRINT('FED Client Version: 8.6.0.0');
      END IF;
    END IF;
    IF @CustKey = 'VersionDLL' THEN
      IF '8.6.2.0' = (@Value) THEN
        PRINT('FED DLL Version: 8.6.2.0');
      ELSE
        PRINT('FED DLL Version: 8.6.2.0');
      END IF;
    END IF;
  END IF;
  IF @NVTGC = 'ILL' THEN
    IF @CustKey = 'VersionClient' THEN
      IF '8.7.0.0' = (@Value) THEN
        PRINT('ILL Client Version: 8.7.0.0');
      ELSE
        PRINT('ILL Client Version: 8.7.0.0');
      END IF;
    END IF;
    IF @CustKey = 'VersionDLL' THEN
      IF '8.7.1.0' = (@Value) THEN
        PRINT('ILL DLL Version: 8.7.1.0');
      ELSE
        PRINT('ILL DLL Version: 8.7.1.0');
      END IF;
    END IF;
  END IF;
  IF @NVTGC = 'SFLT' THEN
    IF @CustKey = 'VersionClient' THEN
      IF '8.6.0.0' = (@Value) THEN
        PRINT('SFLT Client Version: 8.6.0.0');
      ELSE
        PRINT('SFLT Client Version: 8.6.0.0');
      END IF;
    END IF;
    IF @CustKey = 'VersionDLL' THEN
      IF '8.6.2.0' = (@Value) THEN
        PRINT('SFLT DLL Version: 8.6.2.0');
      ELSE
        PRINT('SFLT DLL Version: 8.6.2.0');
      END IF;
    END IF;
  END IF;
END;
```

Results Set:

INFO: Checking Client and DLL Version

ENT Client Version: 8.6.0.0
ENT DLL Version: 8.6.2.0
FED DLL Version: 8.6.2.0
FED Client Version: 8.6.0.0
ILL Client Version: 8.7.0.0
ILL DLL Version: 8.7.1.0
SFLT DLL Version: 8.6.2.0
SFLT Client Version: 8.6.0.0
The Wizard Behind the Curtain

• Changing stuff (not for the timid)
  • Finding and Fixing “Dirty” Data
  • Examples:
    • Version Mismatches in Multi-site systems
    • Inconsistencies in Terminology and Naming
    • Odd Entries in Key Tables
    • Imposing Standard Values

```sql
SELECT DISTINCT Department, COUNT(Department)
FROM Users
GROUP BY Department
ORDER BY Department;
```

```sql
SELECT DISTINCT Status, COUNT(Status)
FROM Users
GROUP BY Status
ORDER BY Status;
```

<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>NULL</td>
<td>0</td>
<td>NULL</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>Unaffiliated</td>
</tr>
<tr>
<td>AHEC</td>
<td>2878</td>
<td>Unaffiliated</td>
</tr>
<tr>
<td>AHEC - individu</td>
<td>1</td>
<td>Unaffiliated</td>
</tr>
<tr>
<td>Alumni</td>
<td>1</td>
<td>60 ICU</td>
</tr>
<tr>
<td>Charlotte MBA</td>
<td>26</td>
<td>Academic Computing</td>
</tr>
</tbody>
</table>

```
SELECT * FROM Customization
```

<table>
<thead>
<tr>
<th>CustKey</th>
<th>Value</th>
<th>NVTGC</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>934</td>
<td>6:00am</td>
<td>SFLT</td>
<td>The time each day at which the system manager sets the system up for the day</td>
</tr>
<tr>
<td>935</td>
<td>21</td>
<td>ENT</td>
<td>System value</td>
</tr>
<tr>
<td>936</td>
<td>21</td>
<td>FED</td>
<td>System value</td>
</tr>
<tr>
<td>937</td>
<td>21</td>
<td>ILL</td>
<td>System value</td>
</tr>
<tr>
<td>938</td>
<td>21</td>
<td>SFLT</td>
<td>System value</td>
</tr>
<tr>
<td>939</td>
<td>c:\ program files\vlad\print \</td>
<td>ENT</td>
<td>Default path for Word documents for auto-opening</td>
</tr>
<tr>
<td>940</td>
<td>c:\ program files\vlad\print \</td>
<td>FED</td>
<td>System value</td>
</tr>
<tr>
<td>941</td>
<td>c:\ program files\vlad\print \</td>
<td>ILL</td>
<td>System value</td>
</tr>
<tr>
<td>942</td>
<td>c:\ program files\vlad\print \</td>
<td>SFLT</td>
<td>System value</td>
</tr>
<tr>
<td>943</td>
<td>PrintDocumentsPath</td>
<td>c:\program files\vlad\print \</td>
<td>Default path for Word documents for auto-opening</td>
</tr>
<tr>
<td>944</td>
<td>PrintDocumentsPath</td>
<td>c:\program files\vlad\print \</td>
<td>Default path for Word documents for auto-opening</td>
</tr>
</tbody>
</table>
The Wizard Behind the Curtain

• Changing stuff (not for the timid)

• Finding and Fixing “Dirty” Data

• Examples:
  • Version Mismatches in Multi-site systems
  • Inconsistencies in Terminology and Naming
  • Odd Entries in Key Tables
  • Imposing Standard Values
  • Cleaning up old data

Select ESPShipTo, LTRIM(SUBSTRING(ESPShipTo, LEN(ESPShipTo)+1-CHARINDEX(' ', REVERSE(REPLACE(ESPShipTo,'-',''))), from LenderAddresses
where ((ESPShipTo IS NOT NULL) and (ESPShipTo > ''))
and ISNUMERIC(SUBSTRING(REVERSE(REPLACE(ESPShipTo,'-','')),-4),1,4) = 1
and LTRIM(SUBSTRING(ESPShipTo, LEN(ESPShipTo)+1-CHARINDEX(' ', REVERSE(REPLACE(ESPShipTo,'-',''))), LEN(ESPShipTo)
The Wizard Behind the Curtain

• Changing stuff (not for the timid)
  • Moving the system to new hardware
    • Example:
      • ILLiad Server/Database Migration
        • Lots of Moving Parts
          • Database Itself
          • Web Pages
          • Services
          • File Share(s)
          • Client
          • Addons

• Preparation
• Preparation
• Preparation
The Wizard Behind the Curtain

• Changing stuff (not for the timid)
  • Modifications required by Institutional Change
    • Example:
      • Mandated Authentication Changes
      • Adding/Subtracting Sites & Delivery Locations
The Wizard Behind the Curtain

- Changing stuff (not for the timid)
- Modifications required by Institutional Change
  - Example:
    - Mandated Authentication Changes
    - Adding/Subtracting Sites & Delivery Locations

```sql
-- cursor to iterate over all the user records that appear in UsersTemp multiple times and NewUsername already exists in Users

declare newusername_cursor cursor for

    Select ut.OldUsername, ut.NewUsername,
         ut.LastChangedDate,
         ROW_NUMBER() OVER(PARTITION BY ut.NewUsername ORDER BY ut.LastChangedDate DESC) Position
    from UsersTemp ut
    join Users u on u.Username = ut.OldUsername
    where ut.NewUsername in
      ( select Distinct NewUsername
        from UsersTemp
        group by NewUsername
        having COUNT(NewUsername) > 1
      )
    order by NewUsername, Position, ut.LastChangedDate;

-- local variables to store old username, new username, and Position

declare @oldusername nvarchar(100);
declare @newusername nvarchar(100);
declare @position Int;

open newusername_cursor;
fetch next from newusername_cursor into @oldusername, @newusername, @position;

while @@FETCH_STATUS = 0 begin
    begin
      -- update users: Disavow, storing OldUsername in the UserInfo3 field

      IF @position = 1
        BEGIN
            UPDATE Users
            set Username = @newusername,
               UserInfo = @oldusername
            where Username = @oldusername;
        END
      ELSE
        update users: Disavow, storing 'Disavowed via User Curl' in the UserInfo field, NewUsername in UserInfo field
```
The Wizard Behind the Curtain

- Changing stuff (not for the timid)
- Modifications required by Institutional Change
  - Example:
    - Mandated Authentication Changes
    - Adding/Subtracting Sites & Delivery Locations

```sql
DECLARE @deliloc nvarchar(10), @parentsitename nvarchar(10), @delilocdesc nvarchar(50);

-- Fill out the VALUES for the Parent Site (@parentsitename), the Delivery Location code (@deliloc), and the Delivery Location description (@delilocdesc). If a single server, and the parent site is ILL.

-- EDIT THESE VALUES BEFORE RUNNING SCRIPT --
SET @deliloc = '';
SET @parentsitename = '';
SET @delilocdesc = '';

-- DO NOT EDIT BELOW THIS LINE --

-- Insert value into DeliveryLocations table
INSERT INTO [dbo].[DeliveryLocations] ([Symbol], [Value]) VALUES (@deliloc, @delilocdesc);

-- Copy parent site OpenURLMapping entries for delivery location
INSERT INTO [dbo].[OpenURLMapping] ([NVTGC], [URL_Ver], [rfr_id], [ILLiadAction], [ILLiadFieldName], [OpenURLFieldVALUES], [ILLiadValue])
SELECT @deliloc, [URL_Ver], [rfr_id], [ILLiadAction], [ILLiadFieldName], [OpenURLFieldVALUES], [ILLiadValue] FROM [dbo].[OpenURLMapping] WHERE [NVTGC] = @parentsitename;

-- Copy parent site WorkFormMapping entries for delivery location
INSERT INTO [dbo].[WorkFormMapping] ([NVTGC], [WorkFormType], [OCLCFieldName], [ILLiadFields], [ConstantDataAction])
SELECT @deliloc, [WorkFormType], [OCLCFieldName], [ILLiadFields], [ConstantDataAction] FROM [dbo].[WorkFormMapping] WHERE [NVTGC] = @parentsitename;
```
The Wizard Behind the Curtain

• And the list goes on......
  • There are as many potential projects of this nature out there as there are people using ILLiad/Ares/Aeon systems.
ALERT
CONDITION: RED
Ask Atlas: Kerry Keegan

ROUTING RULES
Does it match?

Request Status is updated

If MatchString confirmed, original move blocked & status updated according to rule
Be Careful – Be Aware

• Skipping “normal” workflow steps can cause update problems
  • Ex. Skipping “Mark Item As Found” will result in items never being updated on OCLC as “Shipped”

• Skipping “normal” workflow steps can cause transactions to go unaccounted for in web reports

Use the illustrated workflow charts in our docs to identify these steps and help plan your rules.

https://prometheus.atlas-sys.com/display/illiad/ILLiad+User+Guides
Routing Table

- **RuleNo**: unique identifier
- **RuleActive**: Yes or No
- **ProcessType**: Borrowing, Lending, Doc Del
- **TransactionStatus**: initial request status
- **MatchString**: query parameters
- **NewProcessType**: Borrowing, Lending, Doc Del
- **NewTransactionStatus**: desired destination
- **RuleDescription**: free text
  - Date & initial changes and new rules!
Reminder:

- Tables for Lending Fields
  - Transactions $\rightarrow$ t.TransactionNumber
  - LenderAddresses/LenderAddressesALL $\rightarrow$ l.LenderString
- Tables for Borrowing Fields
  - Transactions $\rightarrow$ t.Username
  - Users/UsersALL $\rightarrow$ u.Status

Copy & Paste **WARNING!**

Curly quote: ’
Straight quote: ’
When requests from users that have a status of “Alumni” come in to ILLiad Borrowing, they will have their own queue called “Awaiting Alumni Request Processing.”
### Skip “In Transit” Status

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>RuleNo</td>
<td>0</td>
</tr>
<tr>
<td>RuleActive</td>
<td>Yes</td>
</tr>
<tr>
<td>ProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus</td>
<td>In Transit to Pickup Location</td>
</tr>
<tr>
<td>MatchString</td>
<td>t.RequestType = 'Loan'</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Awaiting Customer Contact</td>
</tr>
<tr>
<td>Rule Description</td>
<td>Skips in transit for loans</td>
</tr>
</tbody>
</table>

**Doc Del NewTransactionStatus is:**
Awaiting Doc Del Customer Contact
Similar Solutions

- Skip the **Customer Notified** queues in Borrowing & Doc Del
- Skip shipping labels in Lending
- **Request Conditionalized** to **Cancelled by ILL Staff** in Lending
- Alerting staff of Distance Education users
- Move thesis/dissertation requests to custom queues
Examples

**Item Available Online w/URL**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>RuleNo</td>
<td>0</td>
</tr>
<tr>
<td>RuleActive</td>
<td>Yes</td>
</tr>
<tr>
<td>ProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus</td>
<td>Item Available</td>
</tr>
<tr>
<td>MatchString</td>
<td>t.ProcessType = 'Borrowing'</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Doc Del</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Request Finished</td>
</tr>
<tr>
<td>Rule Description</td>
<td>Moves Borrowing items found available online or in stacks to Doc Del finished</td>
</tr>
</tbody>
</table>

**Note the switch in ProcessType**

Triggered by a Borrowing email that has a Default Status of “Item Available”
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>RuleNo</td>
<td>0</td>
</tr>
<tr>
<td>RuleActive</td>
<td>Yes</td>
</tr>
<tr>
<td>ProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus</td>
<td>Item Available</td>
</tr>
<tr>
<td>MatchString</td>
<td>t.ProcessType = 'Borrowing'</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Doc Del</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Request Finished</td>
</tr>
<tr>
<td>Rule Description</td>
<td>Moves Borrowing items found available online or in stacks to Doc Del finished</td>
</tr>
</tbody>
</table>
Same dropdown option, but for 2 templates!
Similar Solutions

- Recalled items: Borrowing & Lending
- Identifying potential purchase requests
- Notifying patron of international request
- Notifying patron of potential charges
- Notifying patron of renewal pending, approved, denied
- Moving unavailable Doc Del item requests to Borrowing
### Backwards “My Precious” Copyright

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>RuleNo</td>
<td>0</td>
</tr>
<tr>
<td>RuleActive</td>
<td>Yes</td>
</tr>
<tr>
<td>ProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus</td>
<td>Awaiting Copyright Clearance</td>
</tr>
<tr>
<td>MatchString</td>
<td>t.RequestType = 'Article' AND LEN(t.PhotoJournalYear) = 4 AND ISNUMERIC(t.PhotoJournalYear) = 1 AND ((t.PhotoJournalYear &gt; CONVERT(VARCHAR(4), (DATEPART(year,GETDATE())-6)) AND (t.PhotoJournalTitle IN (SELECT PhotoJournalTitle FROM Transactions GROUP BY PhotoJournalTitle HAVING COUNT(PhotoJournalTitle) &lt; 5)) AND DATEPART(year, CreationDate) = DATEPART(year, GETDATE()) OR (t.PhotoJournalYear &lt; CONVERT(VARCHAR(4), (DATEPART(year, GETDATE())-5))) AND ISNULL(CopyrightAlreadyPaid,'No') !='Yes')</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Awaiting Request Processing</td>
</tr>
<tr>
<td>Rule Description</td>
<td>Skips copyright for requests whose Jyear is newer than 5 years, but hasn’t occurred more than 5 times over the past 1 year and creationdate year = current year OR the Jyear is older than 5 years</td>
</tr>
</tbody>
</table>
## Duplicate – loan already in Awaiting Request Processing

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>RuleNo</td>
<td>0</td>
</tr>
<tr>
<td>RuleActive</td>
<td>Yes</td>
</tr>
<tr>
<td>ProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus</td>
<td>Awaiting Request Processing</td>
</tr>
<tr>
<td>MatchString</td>
<td>t.RequestType = 'Loan' AND t.LoanTitle IN (SELECT DISTINCT LoanTitle FROM Transactions WHERE TransactionNumber &lt;&gt; t.TransactionNumber AND Username = t.Username AND t.TransactionStatus IN ('Awaiting Request Processing'))</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Duplicate Loan Review</td>
</tr>
<tr>
<td>Rule Description</td>
<td>Moves potential duplicates to custom queue</td>
</tr>
</tbody>
</table>
### Duplicate – loan already in Checked out to Customer

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>RuleNo</td>
<td>0</td>
</tr>
<tr>
<td>RuleActive</td>
<td>Yes</td>
</tr>
<tr>
<td>ProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus</td>
<td>Awaiting Request Processing</td>
</tr>
<tr>
<td>MatchString</td>
<td>t.RequestType = 'Loan' AND t.LoanTitle IN (SELECT DISTINCT LoanTitle FROM Transactions WHERE TransactionNumber != t.TransactionNumber AND Username = t.Username AND t.TransactionStatus IN ('Request Sent', 'Checked Out to Customer'))</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Duplicate Loan Review</td>
</tr>
<tr>
<td>Rule Description</td>
<td>Moves potential duplicates to custom queue</td>
</tr>
</tbody>
</table>

### Duplicate – article title requested in last 90 days

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>RuleNo</td>
<td>0*</td>
</tr>
<tr>
<td>RuleActive</td>
<td>Yes</td>
</tr>
<tr>
<td>ProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus</td>
<td>Awaiting Copyright Clearance</td>
</tr>
<tr>
<td>MatchString</td>
<td>t.PhotoArticleTitle IN (SELECT PhotoArticleTitle FROM Transactions WHERE CreationDate &gt;= GETDATE()-90 AND TransactionNumber &lt;&gt; t.TransactionNumber AND Username = t.Username)</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Duplicate Article Review</td>
</tr>
<tr>
<td>Rule Description</td>
<td>Moves potential duplicates to custom queue</td>
</tr>
</tbody>
</table>

*Place BEFORE Copyright Routing Rule*
ASK ATLAS