Addons

Information on Addons that enhance SCF processing of both physical and digitial requests.

- Alma Digitization Request Addon
- Alma Physical Item Request Addon

Alma Digitization Request Addon

RSAC decided that all digitization request be made though ILLiad. To facilitate requests for material held at the SCF, the Alma digitization addon for ILLiad was created. This Addon takes an ILLiad digitization request and creates an Alma digitization request that is sent to the SCF IZ.

The source code and installation instructions can be found on github here:

Alma_Digitization_Addon.

TO BE COMPLETED.

Alma Physical Item Request Addon

SCF request processing is transitioning from using emails for items to be sent to fill an ILLiad request for our partners to requests generated in Alma by the Alma_Physical_Addon. This new request path provides for more accountability and documentation. It will also be easier to see when an item is sent to fill a request.

The source code and installation instructions can be found on github here: **Alma_Physical_Addon** .

Set up, Installation and Configuration

User/Account Set Up:

You will need to identify or create an ILL user in your Alma instance that will be the requesting patron. This may be the same or similar to the account used for ILLiad Addon Digitization. This user must have a Job Category of "ILL Staff", a local user group that is allowed to request items from the SCF. Make note of the Primary ID as you will need this for Configuration (see below).

Once you have this user created, please forward the Primary ID to WRLC (kilduff@wrlc.org) so that we can make sure a linked account is created in the SCF. We will also need your return address that will be printed on the slip that will be sent with the item. This should be the same return address that prints on your ILLiad slip.

Installation:

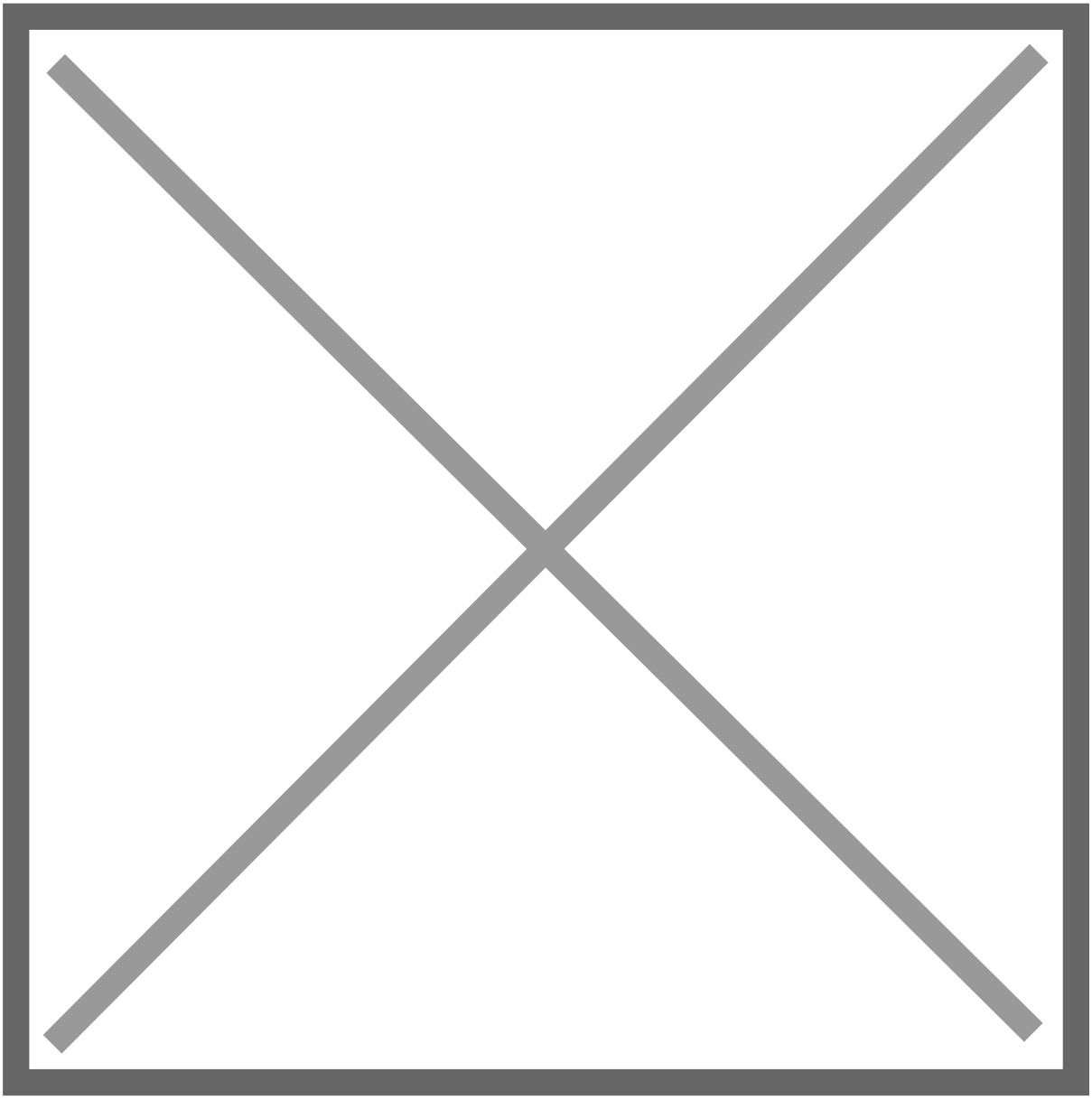
Download and install the Addon in your ILLiad client. See: Installing the ILLiad Client Addon

Configuration:

Configure these settings in the ILLiad client's 'Manage Addons' form:

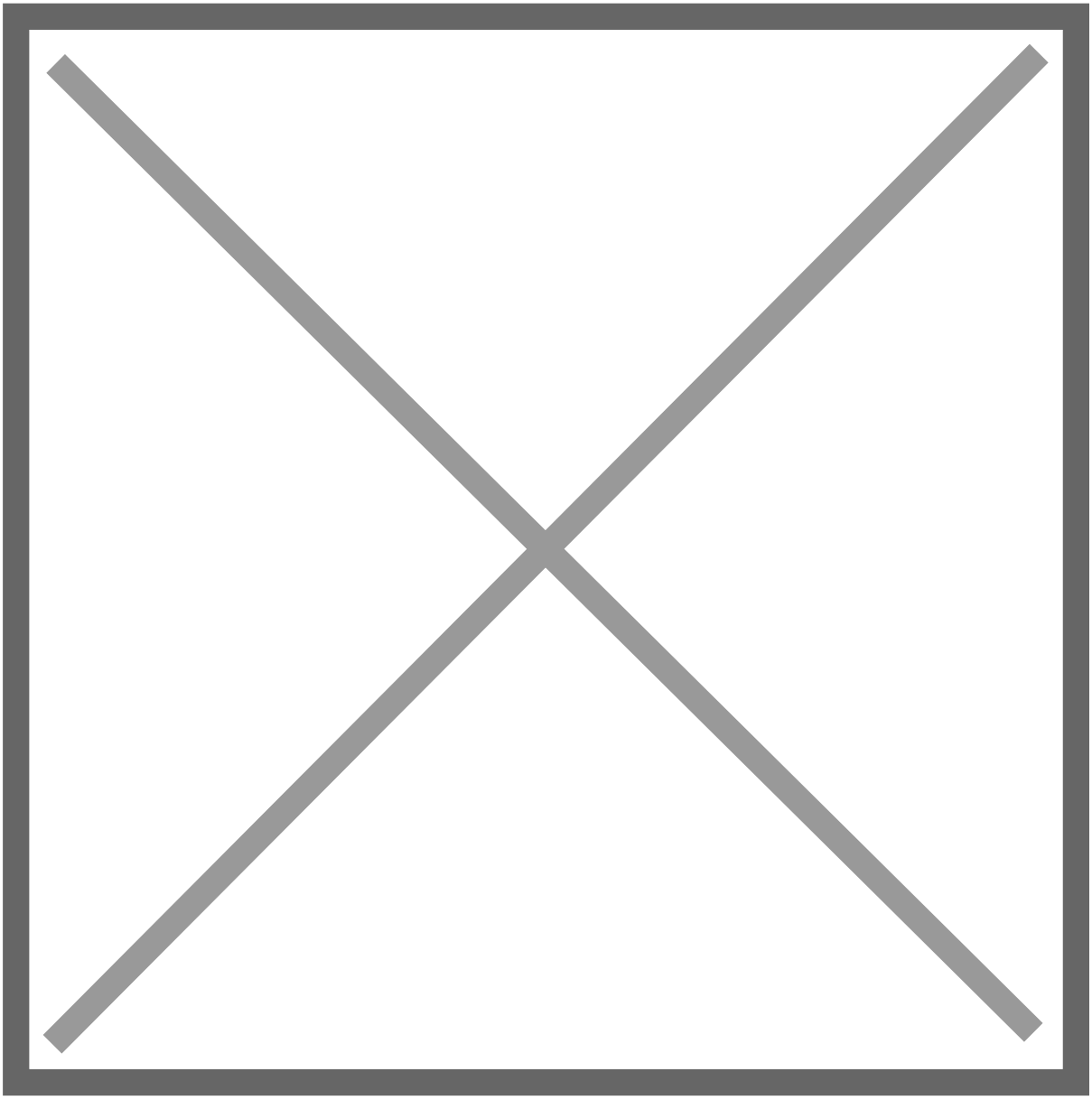
- ○ ○ Institution Code = 01WRLC_GML (Be sure to use your own code!)
  ○ UserId = this is the Primary ID of the user from “User/Account Set Up”
  ○ IlliadClientSecret = (same secret as Digitization Addon, contact WRLC for secret)

(Main ILLiad → Manage Addons → Select “Alma-Physical-Request Addon”)

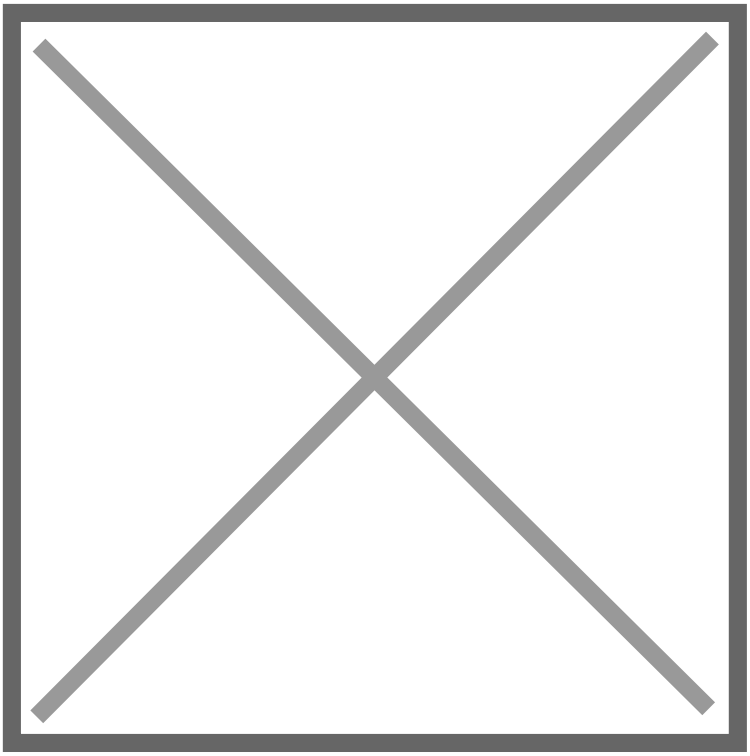


ILL Staff Addon Instructions

1. Once a request has been received in ILLiad for a physical item that is located at the SCF you will need certain item information. You will need to get the item’s “Item ID” and “MMS ID”. This can be accomplished using an Alma Physical item search.

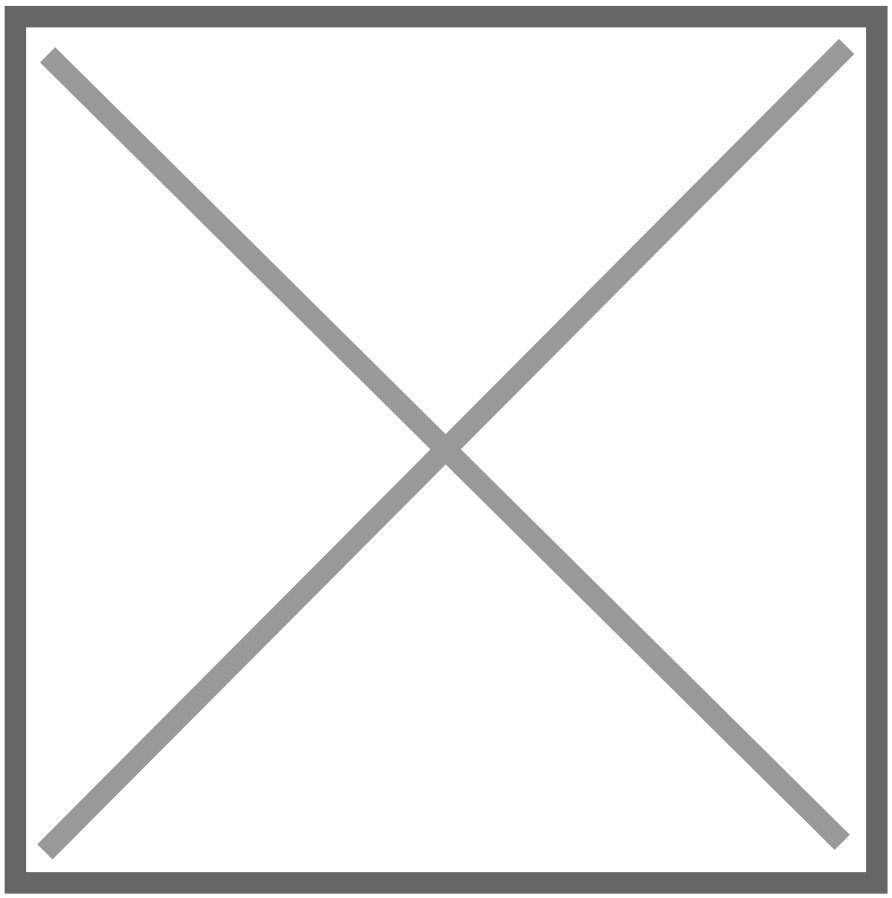


2. These two ID numbers need to be inserted into the ILLiad transaction form. The MMS ID goes in the “Call Number” field, and the Item ID goes under the “Reference Number” field (Reference number is used instead of item number because ILLiad truncated item number to 10 characters, but Alma’s Item IDs can be longer than 10 digits).

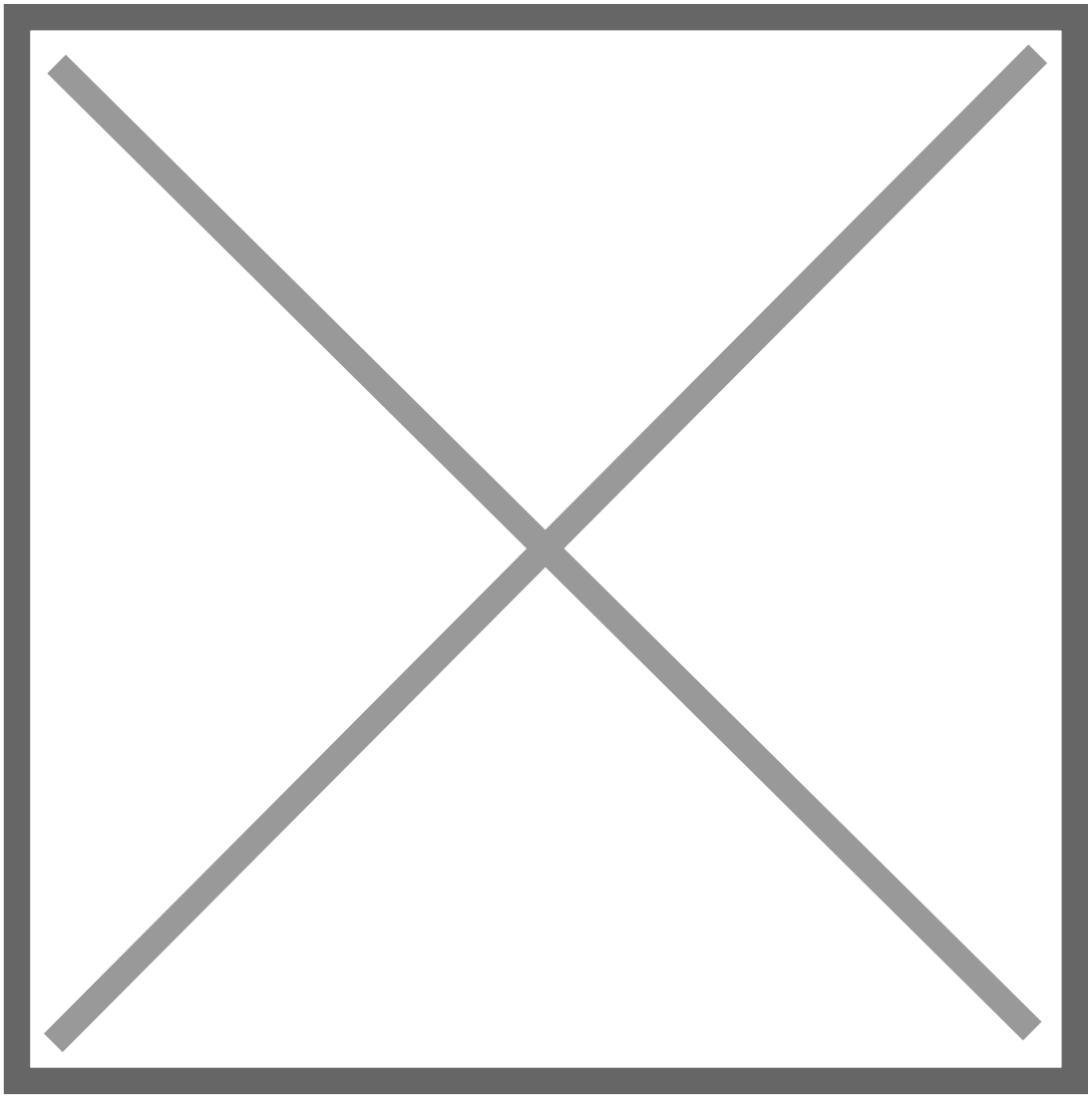


Note: You could also enter the MMS ID and Item ID on the ILLiad Physical Item Request form that is loaded in a following step.

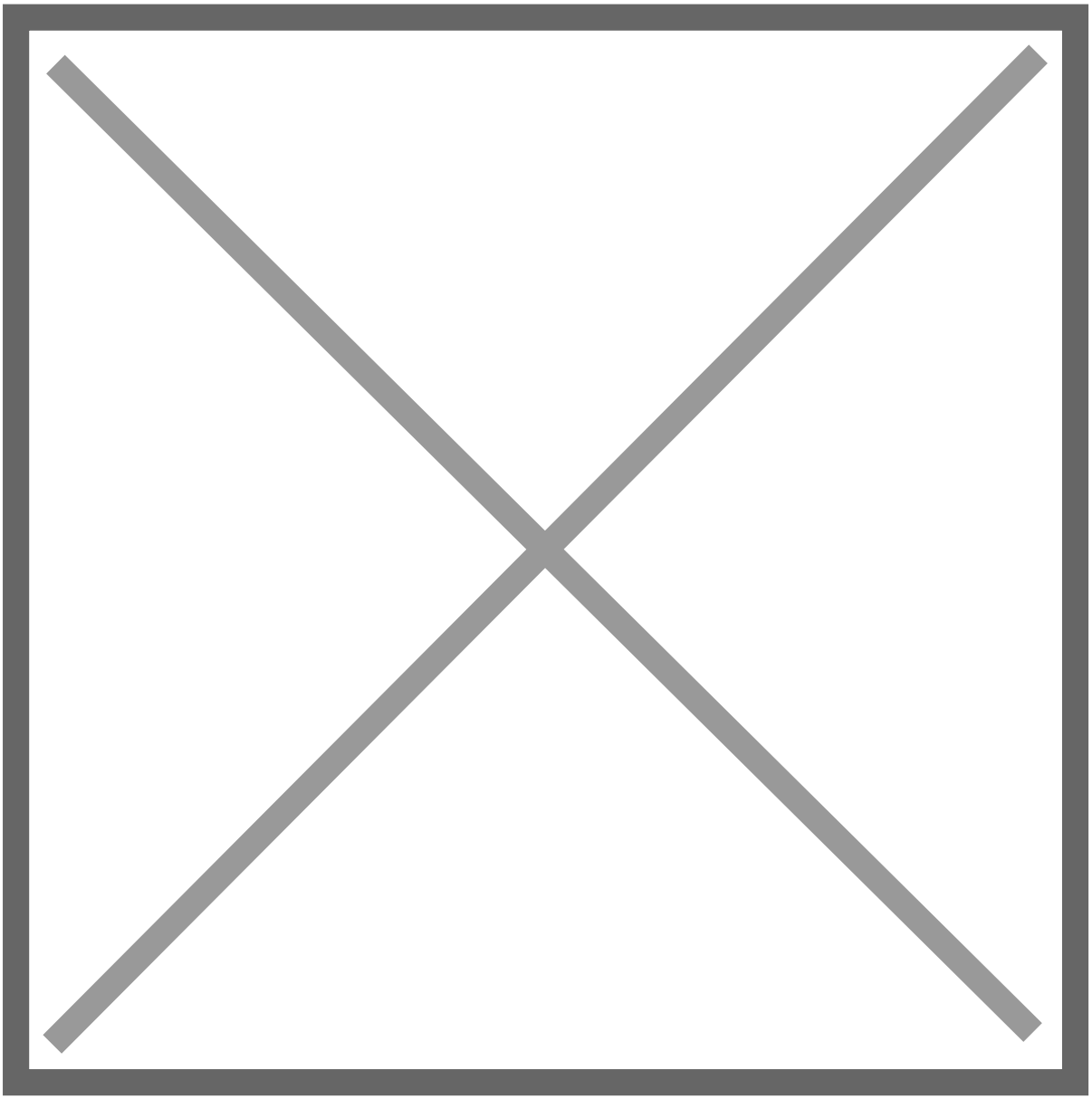
3. Select the WRLC Physical Request plugin tab.



4. Once on the plugin tab, select the Load Request Page button for the WRLC Physical Request form. This will load the form with information pre-populated from ILLIad. You will still need to enter some data.

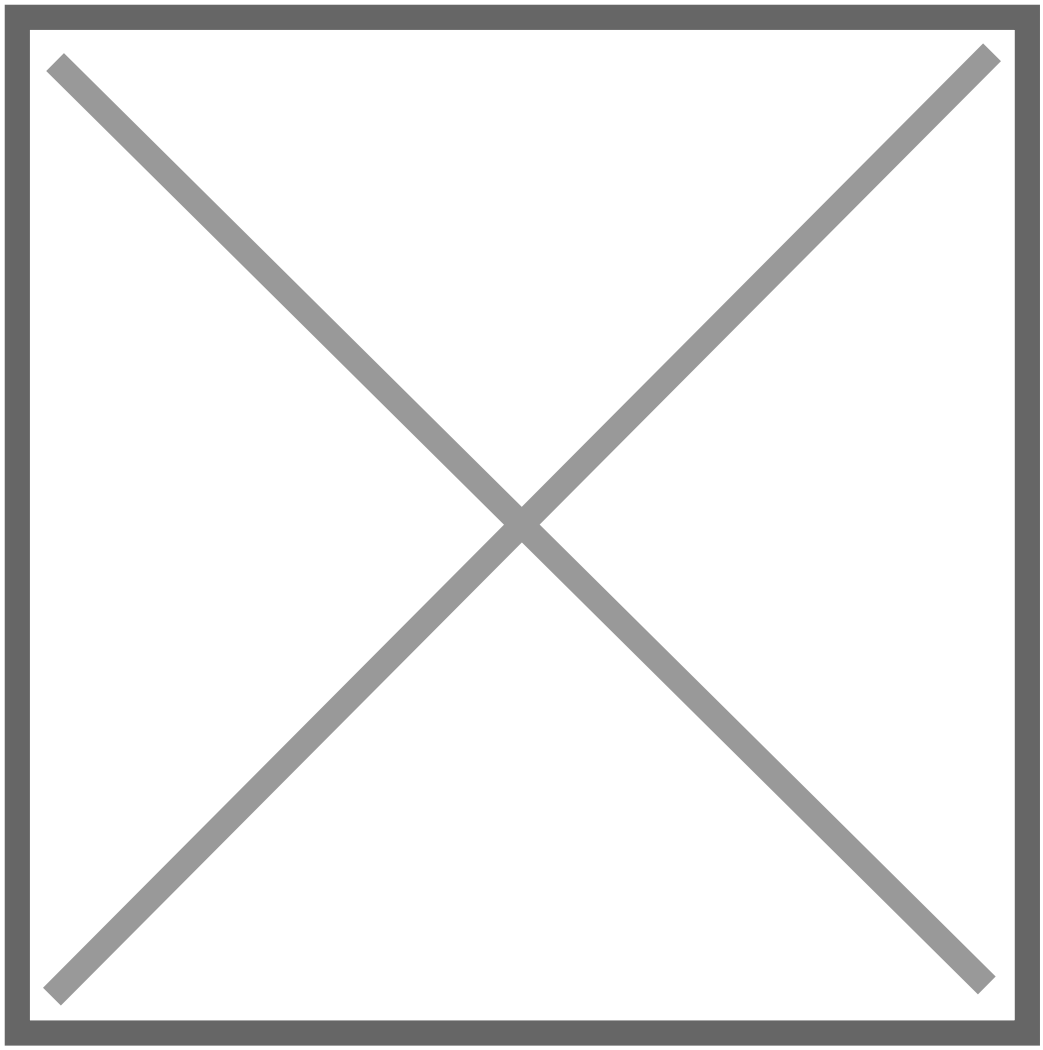


5. The WRLC Physical Request Addon Form



6. You must complete the “WRLC mails item (Y or N)” field.

- ○ ○ Yes
    - ○ ○ WRLC will mail the item if the address information is complete. (We may contact you if there are any questions.)
    - ○ We will insert a pull slip similar to this in the book (see below).
    - ○ We will scan the item in the SCF to put it “in transit” and then scan the item into the owning IZ. (This should put the item on the hold shelf for the requesting ILL patron. This will allow you to see when the item was pulled and sent to the requestor.)
  - ○ No
    - ○ ○ WRLC will scan the item “in transit” and send it to the owning library via the courier.

7. If you did not enter the Item ID and MMS ID in the “Transaction form, then you must do so now. Be sure that both IDs are correct and one or both are not numbers from the original request.

8. All items will have instructions on the Pull Slip to return the item to the owning library. (See example below.)