

What are routing rules/what do they do?

Routing rules allows you to affect the route a request takes through ILLiad.

The request can skip an existing queue or go to a custom queue you have created.

You do this by defining a set of criteria that will trigger the rule.

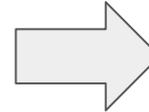
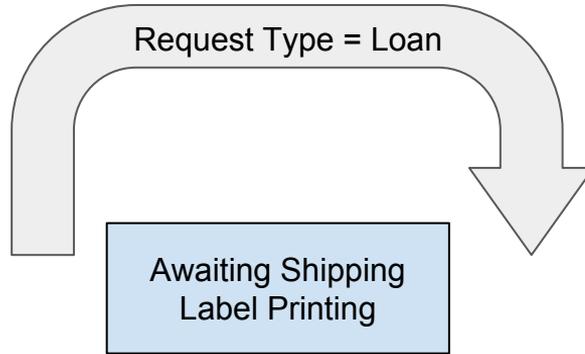
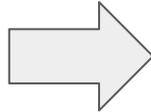


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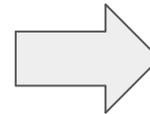
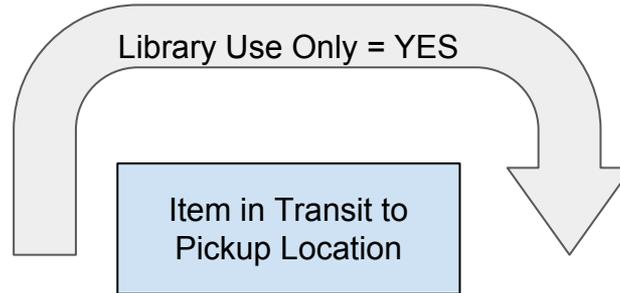
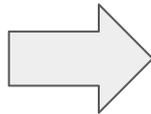
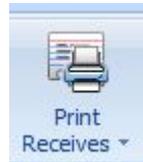
Think: Train Switching Yard.

Skip Existing Queue:
Lending: *Awaiting Shipping Label Printing*

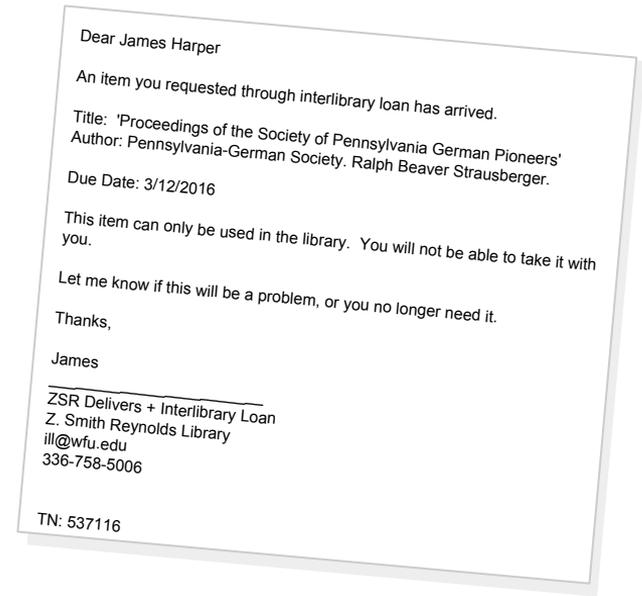


Send to New Queue

Borrowing: *Library Use Only*



Library Use Only

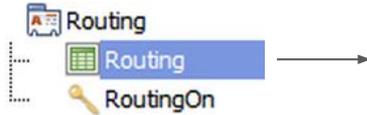


How do I create one?



Customization Manager

SYSTEM



Rule Number matters!!

The number determines in what order the rules are applied.

more later...

Routing

RuleNo	Rule...	ProcessType	TransactionStatus	MatchString	NewProcessType	NewTransactionStatus	RuleDescription
0	Yes	Borrowing	Awaiting Request Processing	(t.ISSN > " or t.ESPNumber ...	Borrowing	Awaiting Direct Request Sending	Direct request for all patrons
1	no	Borrowing	Awaiting Request Processing	(t.ISSN > " or t.ESPNumber ...	Borrowing	Awaiting Direct Request Sending	direct request for copies
2	Yes	Borrowing	Awaiting Copyright Clearance	t.CitedTitle = 'Offsite'	Doc Del	Offsite Storage	Rule to move requests to Offsite
4	Yes	Borrowing	Awaiting Copyright Clearance	t.CitedTitle = 'DDArticle'	Doc Del	Awaiting DD Stacks Searching	Rule to move articles to doc deliv
6	Yes	Borrowing	Awaiting Request Processing	t.CitedTitle = 'DDLoan'	Doc Del	Awaiting DD Stacks Searching	Rule to move Doc Del loan reques
7	Yes	Borrowing	Awaiting Copyright Clearance	u.NVTGC='EWF' and t.Requ...	Borrowing	Awaiting Request Processing	moves journal older than 5 years
13	Yes	Borrowing	Awaiting Request Processing	t.Rush = 'Rush'	Borrowing	Awaiting Rush Request Processing	moves Rush items to the Rush pr
14	Yes	Borrowing	Awaiting Request Processing	u.NVTGC='EWF' and t.Locat...	Doc Del	Offsite Storage	routing borrowing offsite ill to do
17	Yes	Borrowing	Awaiting Copyright Clearance	u.NVTGC='EWF' and t.Doc...	Borrowing	Awaiting Request Processing	bypass copyright clearance for b
18	Yes	Borrowing	Customer Notified via E-Mail	u.NVTGC='EWF' AND t.Req...	Borrowing	Checked Out to Customer	Skipping the Checkout slip step
19	Yes	Borrowing	Awaiting Return Label Printing	u.NVTGC = 'EWF' and Reque...	Borrowing	Request Finished	skip shipping label printing
27	Yes	Doc Del	Request Routed to ILL	u.NVTGC='EWF'	Borrowing	Awaiting Request Processing	move Doc Del to Borrowing
28	Yes	Doc Del	In Transit to Pickup Location	u.NVTGC='EWF' and u.Stat...	Doc Del	Home Delivery	moving ZSR books to special que
29	Yes	Doc Del	In Transit to Pickup Location	u.NVTGC='EWF' and u.Stat...	Doc Del	Home Delivery	moving ZSR books to special que
30	Yes	Doc Del	Awaiting Document Delivery Processing	u.NVTGC='EWF' and t.Locat...	Doc Del	Offsite Storage	
31	Yes	Doc Del	In Transit to Pickup Location	u.NVTGC='EWF' and t.Req...	Doc Del	Request Finished	moving Doc Del requests past Cu
49	Yes	Borrowing	In Transit to Pickup Location	u.NVTGC='EWF' and t.Requ...	Borrowing	Library Use Only	move Library Use Only books to c
50	Yes	Borrowing	In Transit to Pickup Location	u.NVTGC='EWF' and u.Stat...	Borrowing	Home Delivery	moving ill books to special queue
51	Yes	Borrowing	In Transit to Pickup Location	u.NVTGC='EWF' and u.Stat...	Borrowing	Home Delivery	moving ill books to special queue
55	Yes	Borrowing	In Transit to Pickup Location	u.NVTGC='EWF' and u.Loan...	Borrowing	Checked Out to Customer	skips email step for office deliver
87	Yes	Lending	Awaiting Shipping Label Printing	t.Username = 'EWF' and t.R...	Lending	Item Shipped	Skipping printing shipping labels f
88	Yes	Lending	Awaiting Shipping Label Printing	t.Username = 'EWF' and t.R...	Lending	Request Finished	Skipping printing shipping labels f
89	Yes	Lending	Awaiting Shipping Label Printing	u.NVTGC = 'EWF' and t.Req...	Lending	Item Shipped	Skipping printing shipping labels f
91	Yes	Lending	Priority-Loan	t.Username = 'EWF' and t.R...	Lending	Priority-Article	Putting Priority Article requests in
600	Yes	Borrowing	Cancelled by Customer	t.ILLNumber is NULL	Borrowing	Cancelled by ILL Staff	Automatically update all requests
700	Yes	Doc Del	Cancelled by Customer	t.ILLNumber is NULL	Doc Del	Cancelled by ILL Staff	Automatically update all requests

Edit Row

RuleNo	89
RuleActive	Yes
ProcessType	Lending
TransactionStatus	Awaiting Shipping Label Printing
MatchString	u.NVTGC = 'EWF' and t.RequestType='Loan'
NewProcessType	Lending
NewTransactionStatus	Item Shipped
RuleDescription	Skipping printing shipping labels for Loans



Warning: Shared Server

The routing table is shared so add your **NVTGC** code to any MatchString. Also, be careful with rule numbers. They have to be unique across the whole server.

Edit Row	
RuleNo	49
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	In Transit to Pickup Location
MatchString	u.NVTGC='EWF' and t.RequestType='Loan' and t.LibraryUseOnly='Yes'
NewProcessType	Borrowing
NewTransactionStatus	Library Use Only
RuleDescription	<input type="radio"/> move Library Use Only books to custom queue.

Transaction Status
BEFORE rule is applied.

Transaction Status
AFTER rule is applied.

'What the heck was
this rule for again?'

MatchString - criteria for the rule.

****Use single quotes NOT double****

Tables

u. = User Table

t. = Transaction Table

l. = Lender Address Table

= means equal

!= means does NOT equal

< less than

<= less than or equal to

> greater than

>= greater than or equal to

Multiple values using IN

u.Status in ('Faculty','Staff','Retired')



Rule Numbers Matter!!

RuleNo	Rule...	Process...	TransactionStatus	MatchString	NewProces...	NewTransactionStatus	RuleDe
49	Yes	Borrowing	In Transit to Pickup Location	u.NVTGC='EWF' and t.RequestType='Loan' and t.LibraryUseOnly=...	Borrowing	Library Use Only	move L
55	Yes	Borrowing	In Transit to Pickup Location	u.NVTGC='EWF' and u.LoanDeliveryMethod='OFFICE DELIVERY' a...	Borrowing	Checked Out to Customer	skips e

I want to apply the **Library Use Only** rule (#49) before I apply the **Office Delivery** rule (#55).

Because if a book is library use only, it can't be delivered to a professor's office.

Note: you can skip numbers.



Questions so far?



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