

ILLiad-Alma Integration Working Session

March 4, 2019

Agenda

- February 19th session follow up
- New questions

Q: Can we configure just the transfer of unfilled resource sharing requests from Alma to ILLiad?

A: Yes! Here's what you'll need to configure.

In Alma:

1. Create ILLiad Resource Sharing Partner
2. Create a Rota Template
3. Create a Rota Assignment Rule
4. Create a Send Borrowing Request Rule
5. Configure Allowed Email

In ILLiad:

1. Configure and turn on the ILLiad Email Import feature

Q: How can we stop test requests from being processed by Direct Request?

A: Set the ILLiad email import feature to route requests to a test queue

EmailImport1LoanStatus ILL

Settings

Key Value
Email Import

Description

Q: Google is blocking ILLiad's access to the GMail account I created. How do I fix this?

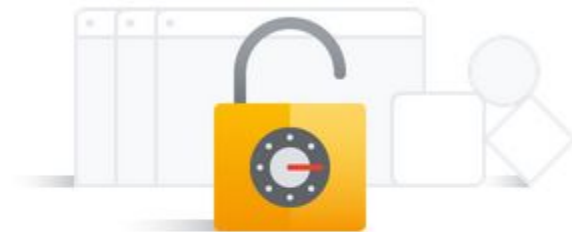
A: Turn on Less Secure App Access in the Security tab of the Google Account settings.

Less secure app access

Your account is vulnerable because you allow apps and devices that use less secure sign-in technology to access your account

 On

[Turn off access \(recommended\)](#)



Q: Will Gmail automatically delete the emails sent by Alma, or will I have to clean out the inbox manually?

A: Gmail can either delete or archive emails automatically. This can be configured in Gmail's Forwarding and IMAP/POP settings.

Settings

General Labels Inbox Accounts and Import Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat

Forwarding:

[Learn more](#)

Add a forwarding address

Tip: You can also forward only some of your mail by [creating a filter!](#)

POP download:

[Learn more](#)

1. Status: POP is enabled for all mail that has arrived since Feb 22

- Enable POP for **all mail** (even mail that's already been downloaded)
- Enable POP for **mail that arrives from now on**
- Disable** POP

2. When messages are accessed with POP

- archive Gmail's copy
- keep Gmail's copy in the Inbox
- mark Gmail's copy as read
- archive Gmail's copy**
- delete Gmail's copy

3. Configure your email client (e.g. Outlook)

[Configuration instructions](#)

IMAP access:

(access Gmail from other clients using IMAP)

[Learn more](#)

Status: IMAP is disabled

- Enable IMAP
- Disable IMAP**

Q: If I'm curiculating ILLiad borrowing loan requests in Alma, will ILLiad still send pick-up email notifications to the patron?

A: Yes, so you'll want to disable those notifications in ILLiad with a custom routing rule that bypasses the Awaiting Customer Contact queue.

Edit Row	
RuleNo	999
RuleActive	No
ProcessType	Borrowing
TransactionStatus	Awaiting Customer Contact
MatchString	t.RequestType='Loan'
NewProcessType	Borrowing
NewTransactionStatus	Circulating via Alma
RuleDescription	

Q: Where do I find the Alma library code(s) I need to enter into the NCIP addon's sublibraries.txt file?



A: I found them by navigating to Configuration|General|Add a Library or Edit Libraries Information, clicking the Libraries tab, and then looking in the Path field.

< List of libraries Cancel Save


University at Albany ▼

Organization Unit Type	Institution	Path	01SUNY.01SUNY_ALB
Code	01SUNY_ALB	Description	University at Albany

Summary Libraries Contact Information Calendar Management

1 - 18 of 18 + Add a Library  

Organization Unit Name	Description	Organization Unit Type	Path	ISIL Code
1 Dewey Library	-	Library	01SUNY.01SUNY_ALB.ALBN	-



Q: What if my library doesn't put our barcodes in the ItemNumber field?

A: You'll need to either edit the NCIP addon's lua file or ask the IDS Project to edit your Lending Availability Service settings.

To edit the lua file:

1. Open the lua file in an application like Notepad++ or Dreamweaver
2. Find and replace all instances of "ItemNumber" with the field you are using for your barcodes
3. Save the lua file

To change your Lending Availability Service settings

1. Submit help ticket to logic@idsproject.libanswers.com

Questions?

Next session

March 14th at 1:00pm