



New Method for Exporting Unfilled RS Requests from Alma to ILLiad

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New Method for Exporting Unfilled RS Requests from Alma to ILLiad

- Included with November 2019 Alma release, so it is currently available to all SUNY libraries
- Uses an API instead of an Alma email & ILLiad's Email Import feature
- Has no impact on borrowing and lending NCIP addons

How do I configure this new export method?

- Still uses the resource sharing partner, rota template, rota assignment rule, and send borrowing request rule used by the previous export method
- If you never configured the old method, please see:
 - RS Partner: <https://slcny.libanswers.com/faq/260794>
 - Rota Template: <https://slcny.libanswers.com/faq/260795>
 - Rota Assignment Rule: <https://slcny.libanswers.com/faq/260796>
 - Send Borrowing Req. Rule: <https://slcny.libanswers.com/faq/260797>

How do I configure this new export method?

- Configure a new API Key in the WebPlatformConfig table of the ILLiad Customization Manager

WebPlatformConfig					
ID	NVTGC	APIKey	BaseWebserviceUrl	Description	ExternalUserIdMapping
2	ILL	c5e7a20d-e934-45cd-52-98-691402bf46ff	https://[REDACTED].illiad.odc.org/illiadwebplatform/	Illiad Web Platform	Username

- Atlas Systems documentation:
<https://support.atlas-sys.com/hc/en-us/articles/360011809334>
- Must restart the IIS and Odyssey Manager services!

How do I configure this new export method?

- Edit ILLiad resource sharing partner in Alma
 - Change the Export to Third Party setting to “Using API”
 - Enter BaseWebservicesUrl + “/transaction” into the URL field
 - Enter API Key into API Key field
 - Enter an ILLiad field name into Export Request ID Name Tag field
 - Can leave Close Request When Exported box unchecked

How do I configure this new export method?

EXPORT TO THIRD PARTY

Export to third party No Using email Using API

URL *

API key *

Export request ID name tag

Close request when exported

How do I configure this new export method?

- ILLiad will put the exported request in the Awaiting Request Processing queue
- You may want to create an custom routing rule to move these requests to their own queue
- Make sure this rule is the first rule acting on the Awaiting Request Processing queue
- Atlas Systems Documentation:
<https://support.atlas-sys.com/hc/en-us/articles/360011908893-Configuring-Routing-Rules>

How do I configure this new export method?

Edit Row

RuleNo	0
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	t.CitedIn LIKE '01SUNY%'
NewProcessType	Borrowing
NewTransactionStatus	Request Imported from Alma
RuleDescription	

How does this new export method work?

- The first thing Alma does when it attempts to export an unfilled resource sharing request to Alma is check to see if the user who submitted the request has an ILLiad account
- Alma searches the ILLiad user table for the identifier listed in the ILLiad resource sharing partner's User Identifier Type setting
- How the new integration method behaves depends on the results of that check

How does this new export method work?


- If the user has an ILLiad account:
 - A request is created in ILLiad and routed to Awaiting Request Processing
 - The External ID of the Alma request is placed in the ILLiad field listed in the ILLiad resource sharing partner's Export request ID name tag setting
 - The Alma request is assigned to the ILLiad resource sharing partner, and the status is changed to Request Sent to Partner

How does this new export method work?

4 **Peaks and people of the Adirondacks.** Edit View Local Resources ...


Book By Carson, Russell M. L.
(Adirondack Mountain Club 1973
[©1927])

OCLC Number: 01086217
LCCN: 74181585
Pages: xciv, 280 pages
MMS ID: 991668859404836

External identifier: 01SUNYINS0000597
Internal Identifier: 615362830004836
Request Status: Request sent to partner
Partner: ILLiad Requests
Requested Media: Any
Requester: Jackson, Timothy 

Pickup At: Peter J. Cayan Library, SUNY
Polytechnic Institute
Requested Format: Physical
Creation Date: 11/04/2019
Update Date: 11/04/2019

[Other details](#)




How does this new export method work?

- If the user does not have an ILLiad account:
 - No request is created in ILLiad.
 - The Alma request is assigned to the ILLiad resource sharing partner
 - Status is changed to Ready to be Sent
 - Active note is left on the request that states "Failed to send Send Request message to ILLiad Requests, Reason is: The request is invalid. [USERNAME] is not a valid username."

How does this new export method work?

6 [The Adirondacks : a history of America's first wilderness /](#)

Book By Schneider, Paul, (H Holt and Co 1997.)
ISBN: 0805034900
OCLC Number: 36029651
LCCN: 96039844
Pages: xiii, 368 pages :
MMS ID: 991668859304836


External identifier: 01SUNYINS0000598
Internal Identifier: 615367310004836
Request Status: Ready to be sent
Partner: ILLiad Requests
Requested Media: Any
Requester: SUNY, SLC 

Pickup At: Peter J. Cayan Library, SUNY Polytechnic Institute
Requested Format: Physical
Creation Date: 11/04/2019
Update Date: 11/04/2019

Request with active notes

[Edit](#) [View Local Resources](#) [...](#)

[Other details](#)



How do I process a request that couldn't be exported to ILLiad?

- Cancel the request in Alma
 - Add text about creating an ILLiad account to the FulCancelRequestLetter notice

OR

- Manually create an ILLiad account for the user and then resend the request in Alma
 - Atlas Systems documentation:
<https://support.atlas-sys.com/hc/en-us/articles/360011811174-Adding-New-Users-Manually>

How do I process a request that couldn't be exported to ILLiad?

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Book By Schneider, Paul, (H Holt and Co 1997.)

ISBN: 0805034900

OCLC Number: 36029651

LCCN: 96039844

Pages: xiii, 368 pages :

MMS ID: 991668859304836

External identifier: 01SUNYINS0000598

Internal Identifier: 615367310004836

Request Status: Ready to be sent

Partner: ILLiad Requests

Requested Media: Any

Requester: SUNY, SLC 

Pickup At: Peter J. Cayan Library, SUNY Polytechnic Institute

Requested Format: Physical

Creation Date: 11/04/2019

Update Date: 11/04/2019

Request with active notes

[Other details](#)

Edit View Local Resources ...

- View Network Resources
- Cancel
- Duplicate
- Send
- Send query to patron
- Receive
- Edit Shipping Cost
- Reject
- Locate Resource
- Reassign

