Step Right Up!

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IDS Project Conference
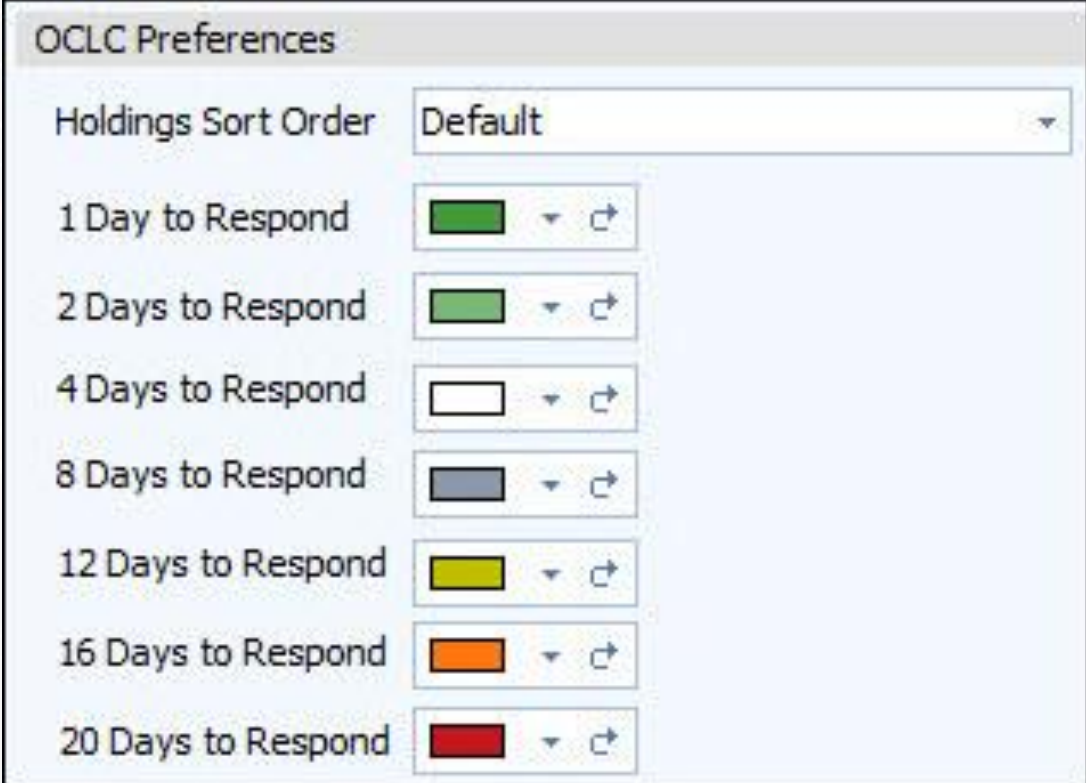
The Web Platform

So…what is a web platform and why do we need one?

- An instruction manual for what a program can do
- **API:** Agreed language where networks can talk to each other
- **Web service:** Interface for other computers to talk to that service, instead of needing a person
- Can use these list of commands to connect with other services and make ILLiad more flexible

The Web Platform

- ILLiad can now talk to the Policies Directory to look up more information

- Different colors can be used for Days to Respond (1, 2, 4, 8, 12, 16, and 20), and can be customized from the ILLiad Options form.

OCLC Preferences screen showing Holdings Sort Order: Default, and color settings for 1, 2, 4, 8, 12, 16, and 20 Days to Respond.

Time Saving Tip

The grid of Holdings
symbols now shows you
the Days to Respond

**Copies on the top,
Loans on the bottom**

Now you don't have to hover and wait to see this information!

Electronic Delivery Utility

Electronic Delivery Utility

**Changed name from "Odyssey Helper"
to "Electronic Delivery Utility"**
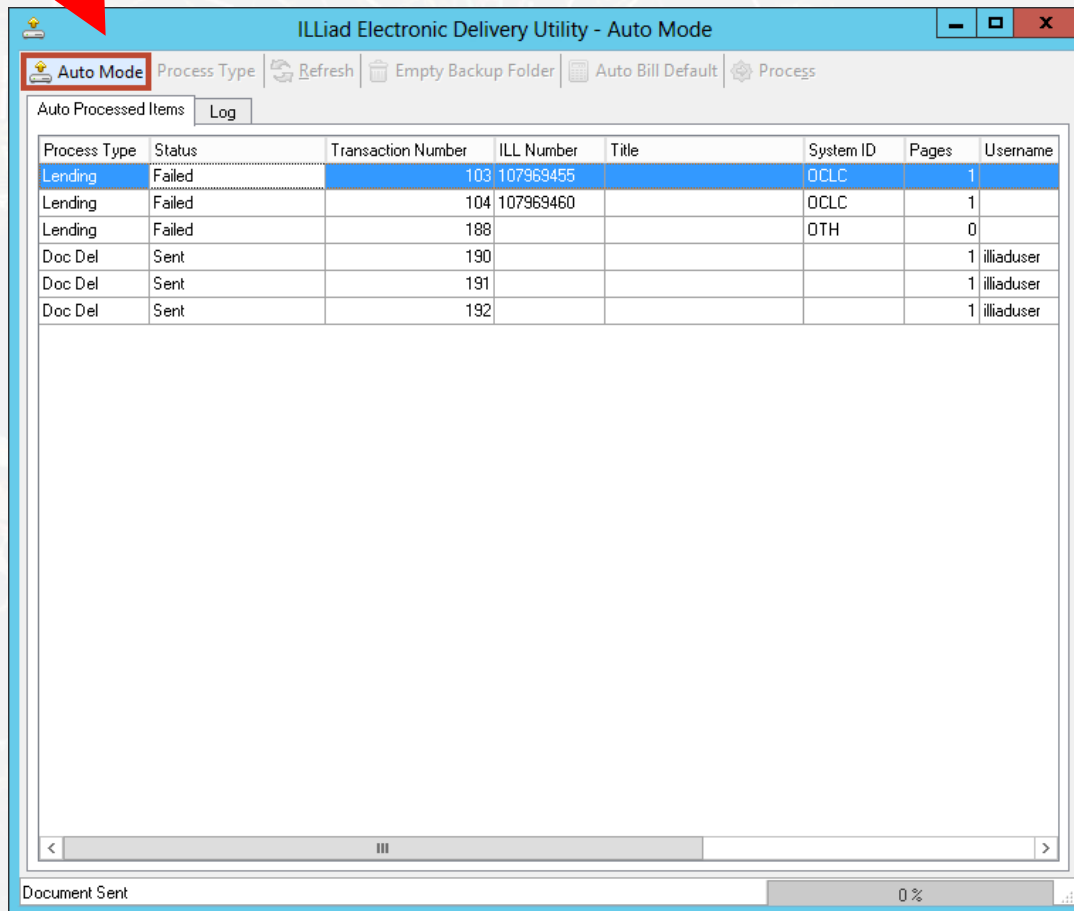
Can now send files using both
Odyssey and Article Exchange

Electronic Delivery Utility

It will find:

- Lending requests at the status of In Stacks Searching and Doc Del Requests at the status of In DD Stacks Searching

- Transactions that have a PDF or TIFF file with a name matching the transaction number in the location specified in the ILLiad Customization Manager

Electronic Delivery Utility

Auto Mode checks for requests every minute and tries to send them automatically

If successful, the request will move to Request Finished. If it fails, it will be moved back to In Stacks Searching/ In DD Stacks Searching

Time Saving Tip

Point the path keys:

- **ElectronicDeliveryUtilityImagesPathDocDel**
- **ElectronicDeliveryUtilityImagesPathLending**

to a share drive that both your scanner and ILLiad clients can access.

With AutoMode, the items will deliver straight from this folder, without ever having to see the client.

Time Saving Tip

Turn Article Exchange sending on using the **SendArticleExchangeOnOdysseyFailure** key

If a request is sent via Odyssey and it fails, the Electronic Delivery Utility will then use Article Exchange to send the article

Web Pages

Web aliases can be easily created, edited, and deleted in the ILLiad Customization Manager from the DisplayStatuses table

Web Pages

DisplayStatuses

ID	NVTGC	ProcessType	TransactionStatus	WebDisplayStatus
1	ILL	Borrowing	Request Sent	Waiting for Lender
2	ILL	Borrowing	Awaiting OCLC Sending	Waiting for Lender
3	ILL	Borrowing	Request Held Until (. +)	Held til $1
4	ILL	Borrowing	(Awaiting?)(. +) Processing	$1Some Super $2 Magic
5	ILL	Borrowing	Awaiting Request Processing	This status won't be shown since #4 would be picked up
6	ILL	Lending	Awaiting LOCL Request Processing	Awaiting High Priority Lending Processing

Edit Row

ID	
NVTGC	ILL
ProcessType	Lending
TransactionStatus	Awaiting Recall Processing
WebDisplayStatus	Please send material back

Web Pages

You can set more complex password requirements for your patrons accounts

This is for ILLiad authentication users and is regulated in the Customization Manager's WebValidation table

⊘ With the ILLiad default password requirement, passwords must contain:

- At least **8** characters
- At least **1** lowercase letter
- At least **1** uppercase letter
- At least **1** number

Web Pages

You can see all possible web Table customization options for the ILLiad web pages in the documentation

https://prometheus.atlas-sys.com/display/illiad/TABLE+Tags

```
<#TABLE name="ViewOutstandingRequests" headerText="Outstanding Requests"
noDataAction="ShowMessageRow"noDataMessage="No Requests"
column="TransactionNumber:Transaction" column="DocumentType:Type"
column="Title" column="Author" column="TransactionStatus:Status"
orderBy="RequestType,DocumentType, TransactionNumber DESC">
```
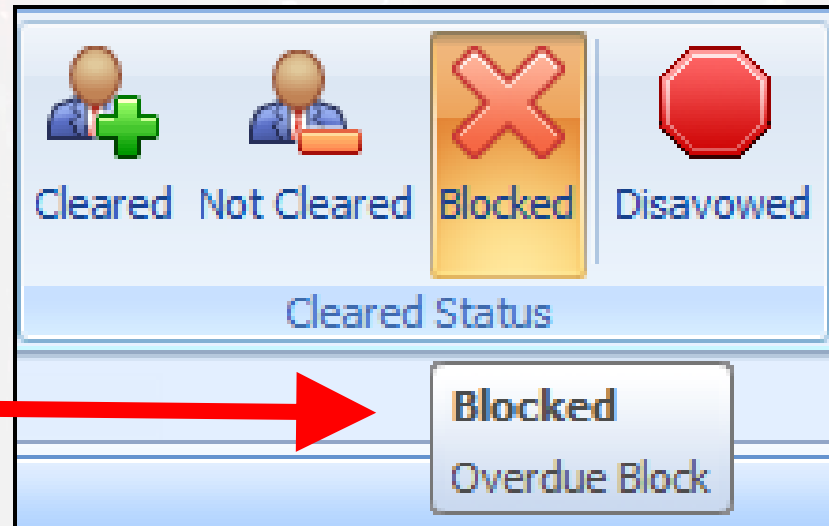
Time Saving Tip

Tired of "What does 'Request Sent' mean?" phone calls?

Users

You can now block patrons specifically for overdues

- You can choose whether or not to do this with the BorrowingBlockOnThirdOverdue key
- The block will happen automatically
- The block will be lifted once the overdue items are returned

Users

We've added new fields in the UserValidation table:
- UserInfo 1-5
- WebAuthType

This has allowed...

Users

...the ability to load patron information for RemoteAuth and LDAP users!

Users

Two ways to use:

1. **Auth** indicates that the User record will be used to authenticate a user. If a user successfully authenticates and their User record does not already exist, a User record will be created with information from the UserValidation data.

1. **Load** is only applicable when using a WebAuthType of LDAP or when Remote AuthSupport is enabled. If so, the default WebAuthType will be used and the UserValidation data is only used to populate a newly created User record after a user successfully authenticates.

Time Saving Tip

- Set up a recurring job that uploads patron information to the server.

- New, qualified users will be logged directly into ILLiad, without having to register

  No more junky patron data!

Email Notifications

- The To, From, CC, BCC, and Subject fields now allow tags to be included.

- Templates can now include a Staff Username, First Name, Last Name, and Description. These fields will be populated based on the staff user who is sending the email.

- The Edit Email form will now display the From and BCC addresses. The From field is read-only.

Email Notifications

- In the EmailCopies table, the EmailTo, EmailFrom, EmailCC, and EmailBCC fields have been updated to nvarchar(max)

- The Subject field has increased to nvarchar(255). Email subjects larger than 255 characters will be truncated

Email Notifications

Cancellation email templates have been split based on request type. The following templates now exist:

- Borrowing Cancellation Article
- Borrowing Cancellation Loan

- Doc Del Cancellation Article
- Doc Del Cancellation Loan

- Lending Cancellation Article
- Lending Cancellation Loan

Time Saving Tip

Let the updater convert your templates for you!

- Make sure to use the file name from the Email Routing entry INCLUDING the .TXT. This will make the ILLiad updater recognized the template and that it will update your field tags.
    - For example, if you have an Email Routing template named Recall.txt, when you create the new template in the ILLiad Customization Manager you will need to name it **Recall.txt**.
- After you update, if you want to you can remove the .txt from the Template name and from the Email Routing entry. The .txt in the name is only needed when updating to make sure the tags are updated.

Text Notifications

- Users can now choose if they want to receive notifications specifically for electronic delivery items. These notifications are separate from loan notifications.

- All users will be automatically subscribed to electronic delivery notifications at first, but this can now be changed.

- A checkbox has been added to the User form to enable or disable notifications for electronic delivery.

Text Notifications

- Users' Notification Method will be changed from E-mail to Electronic.

- Staff and/or patrons can specify which notifications to send as Email and which to send as SMS.

- The Mobile Phone field has been added to the User record and will be used for SMS notifications.

- Text message templates can be created and edited in the ILLiad Customization Manager.

Text Notifications

In order for SMS/Text notifications to send successfully:

- Use the Atlas Twilio server addon (or create your own)
- You must have a subscription with Twilio https://www.twilio.com/
- Set up SMS-specific templates
- Add phone numbers to the Mobile Number field in patron User records
- The user must have the desired notifications checked in the SMS Notifications section on their User record

Text Notifications

- A checkbox can also be added to your web pages for patrons

- The include_notification_preferences.html allows this to happen

Time Saving Tip

Make sure all your users have Electronic Delivery set to "Yes" before the 8.6 update

Electronic Delivery	Yes ▼

Notification Preferences

Notification Method	Electronic ▼

Email Notifications	SMS Notifications
☑ Account Cleared	☐ Account Cleared
☑ Password Reset	☐ Password Reset
☐ Item Pickup	☑ Item Pickup
☐ Item Shipped	☐ Item Shipped
☑ Electronic Delivery	☐ Electronic Delivery
☐ Overdue	☑ Overdue
☐ Cancelled	☐ Cancelled
☑ Other	☐ Other

This will ensure that their Notification Method is set to Electronic and that the right boxes are checked

Database

- The History tab is now available for custom searching

- The MatchString field in the Routing table has been updated in the database to allow nvarchar(max) values, expanding the previous 250 character limit.

Database

The DownloadInProcess routine will now be part of the 12 hour sync done by the ILLiad Connection Manager

If you manually added DownloadInProcessOnNextRun customization key, it will be removed

No more worries about items stuck in WorldShare "In Process"!

Time Saving Tip

No limits! Make those super crazy routing rules!

Combine multiple routing rules into single strings!

Print Templates

- Shipping Addresses table

- Can replace, if necessary, with LA_Address

Print Templates

Only the merged template now appears in MS Word

Time Saving Tip

No pop-ups when printing!

Import into Resubmission

Clicking Import into Resubmission
will now automatically delete the
OCLC request for Unfilled requests

Time Saving Tip

Make an email routing rule that Cancels first, but asks users if they still need it, instead of automatically resubmitting!

Example: *"We have attempted to fill your request, but it was denied by several potential lending institutions. If this item is still needed, please respond to this email, letting us know to continue attempting to find your materials."*

Electronic Delivery

The Resend Request button that is enabled when Odyssey sending fails has moved to the new Odyssey processing ribbon in Lending.

There is now also the ability to enable and disable Odyssey for a specific request.
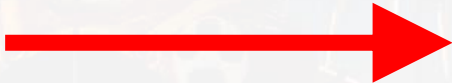
Electronic Delivery

All sites can now receive PDFs!

The requirement for sites to first communicate with another site to determine if the other site can receive PDFs is no longer required.

Time Saving Tip

You can deliver all articles at once!

On the Electronic Delivery form, click the Review All checkbox then click Deliver

Review ☑ All

NOTE: The BillingActive key must be set to No.

Thank You!!!!

Stop us for questions or comments!

Email us at:

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