

# ILLiad Version 7.2 FAQ

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## Update Process

### *Is the update to Version 7.2 mandatory? When is the deadline for updating?*

No, the update to Version 7.2 is not mandatory immediately. While we always want you to update to get the latest improvements and features, you can choose a time to update that's convenient for you and your institution. Eventually older versions of ILLiad will not be supported because the version of the OCLC web services that they are communicating to will be phased out. But this is a matter of months away and only would affect Version 7.0.x at this point.

### *When will we have to update our pages to the new format?*

Again, we would like you to update to the new format for the ILLiad pages soon so that you can have all the improvements and features that come with them (i.e. RSS feeds, CSS files for customizing, searching active requests). But your current Borrowing/Document Delivery pages will continue to work for the foreseeable future with the translation code added to the web DLL. You will need to use the new Lending and Reports pages immediately, but can take your time customizing the Borrowing interface to look how you would like.

If you are not yet live with Borrowing, this would be a great time to update to Version 7.2 and start out with the new web pages instead of customizing them after you're live.

## The 7.2 Web Interface

### *Will the Web Previewer allow me to see what my current web pages will look like in version 7.2?*

Yes. The Web Previewer replaces the old and new tag formats with sample data so that you have some outstanding requests or some basic user information to view. This is helpful for viewing your current pages as well as the new pages for 7.2. The only significant change in how your 7.1 web pages would look with the 7.2 DLL is that the tables are no longer hard-coded with formatting and would use a CSS file for any color, text or size customizations you wanted to make. On the default pages, though, it's not a noticeable change.

### *Should I use the Web Previewer or Dreamweaver to edit my pages?*

What you use to edit your web pages is up to your personal preference. We have had issues in the past with Microsoft FrontPage removing tags from the web pages, but we use Dreamweaver and several plain text editors (i.e. Notepad) without any problems. The advantage of Dreamweaver is site maintenance and a familiar interface for editing pages in a WYSIWYG display, while the advantage of the Web Previewer is viewing pages with sample data. Realistically, both are great tools for editing your ILLiad web, but use whatever you're comfortable with.

### *Can users sort the tables by columns of their choosing or is that controlled by staff setup?*

In the 7.2 Web, staff can choose the field for sorting records in a table and if that field sorts ascending or descending. Once this value is set in the table parameters, though, it can't be edited by customers using the web. This is something we will look into for a future release.

### *Can we edit the wording of the Transaction Statuses in addition to the column names on the web?*

While staff can customize which columns display in tables and the text for those column headers, the data in the table is coming from the database and can't be edited for the web. In particular, several sites have requested the ability to edit the Transaction Statuses that show in Tracking to better explain them to customers. This is a more complicated feature to implement but one we will still look at for a future release.

### *How many CSS files are there for the new web?*

Each ILLiad folder has its own CSS file to customize the look and feel. This includes a file for Borrowing/Doc Del pages, Lending pages and Web Reports pages. If you implement a test web folder after updating to version 7.2, those folders will have their own CSS files. In a shared server installation, each site's folder has its own CSS files as well.

### *What are some of the things we would use Alerts for on the web pages? How do patrons get their alerts?*

What you choose to use Alerts for in the 7.2 web is really up to you and the great ideas you have. Some common uses we have thought of were to post any irregular office hours, closings or new services that you're offering to certain customers. But you can also use it for any news or announcements you would like your customers to receive. Customers can view the alerts on the main menu of the 7.2 web interface or via an RSS reader if they subscribe to the RSS feed for Alerts. Alerts are not emailed to your customers or borrowing libraries.

### *Do shared server installations use one set of Lending web pages or a separate set for each site?*

The format for your Lending web pages is dependent on how your office processes incoming lending requests as well as if your institution shares an address database. If you have split out your address database into separate views (SSSLenderAddressesALL is set to Yes), each site can have its own set of Lending web pages that is independent of other sites on the same server. If a borrowing library requests something from site ABC, that library can fill the request or cancel it. They cannot route the request to another library on the same server, though, as each site's set of addresses is independent.

If a shared server institution also shares its address database (SSSLenderAddressesALL is set to No), it can also share a Lending web interface. All incoming requests would start at one of the processing sites (based off of the LendingWebDefaultNVTGC value) and can be routed to other libraries on the same server for fulfillment. Since there is only one web interface, the borrowing customer continues to see the requests via the web, regardless of which processing library is handling the request.

As a note, be sure that your LendingWebDefaultNVTGC customization key is set to your side code if you are shared server or the site code of the main site where all incoming lending requests start. Do not leave the value as Lending if you are shared server, or your lending requests will be submitted with a username that no site can see. Lending is only a valid value for single server installations.

### *Can each site on a shared server installation have its own test web?*

Yes, each library on a shared server installation can have its own set of test web pages. You can even set up more than one test web on a web server, if you'd like to test a variety of page formats. While you can use the Web Previewer before updating to Version 7.2 to edit your web pages, the test web only works in Version 7.2. OCLC and Atlas hosted servers will create test webs for your sites as part of the upgrade process. But you can create your own pretty easily after updating to Version 7.2.

### *Does the password reset option work if I used LDAP/ILLiad Exclusive/Remote Auth?*

While the link exists to reset your password on all default 7.2 web pages, it would not be of use to a site using LDAP, ILLiad Exclusive or Remote Auth authentication. In those cases, the password is set and maintained by an outside system and shouldn't be reset or edited by an ILLiad customer. You can remove the "forgot password?" link on the Logon.html and Logon2.html pages.

### *Can we resubmit/cancel/renew multiple requests at once with one click?*

While you can perform specific tasks on a transaction regardless of how you found it (search request on web, viewing all active requests, viewing specific menus), you cannot select multiple requests and perform a single action on them all.

## **E-Mail**

### *If you turn on the Email Manager, will the email templates still live on the local client machine (or wherever the EMailLocation customization key indicates)?*

Yes, e-mail templates still live wherever the EMailLocation customization key points, either in a local folder (c:\illiad\email\) or a shared folder (\\servername\illiad\email\). The templates are used by each individual component to create the entry for the EMailCopies table and the Email Manager uses the customization keys to send the e-mail from the server. DLL e-mail templates and Odyssey Manager e-mail templates would still live on the web server.

### *Will emails that we sent to users previous to the update be visible on the Notifications page once we update to version 7.2?*

Yes, your customers will be able to view the most recent 20 e-mails sent from the Notifications page, regardless of turning on the Email Manager for sending future emails.

### *If our server is hosted, can we use the Email Manager?*

Yes, if your server is hosted by OCLC or Atlas, you can still use the Email Manager. During the update, your Email Manager is installed and the service is started, but ILLiad will not use the Email Manager to send emails until EMailManagerSupport is set to Yes in the Customization Manager. If your SMTP mail server will not allow you to send emails from a remote location (i.e. your hosted ILLiad web server), it's possible for you to setup the Email Manager service on a machine locally instead. Use this option with caution, though, as you'll be taking on the upkeep of that service for all your outgoing emails to function and it may defeat part of the purpose of having a hosted server in the first place. ☺

### *Can we re-send emails that fail?*

Yes. This is one of the great features of the Email Manager is that you can cancel or resend failed emails. If an email does not successfully send, it displays in the failed tab of the Email Manager log under System Information as well as the “stop sign” appears on the Main Menu. You can cancel or resend individual emails (with the option to edit the email before resending) as well as resend all failed emails.

### *Can we customize the welcome email based off of status or department?*

No, but this is a great idea. 😊 Currently, both in the ILLiad Client and the ILLiad web DLL, the emails sent to newly registered and cleared customers use the same template for all users. In a future release we will look at being able to customize those templates based off of delivery location and/or status.

## Library Addresses

### *Since I have to match addresses that come in after the update to 7.2, will I lose my current address information, billing categories or groups?*

You will not lose any of your current address information when you update to Version 7.2. After updating to 7.2, you will need to assign ShipTo and BillTo values for the addresses associated with any new requests you download. This is not nearly as tedious as it seems, and after assigning the ShipTo and BillTo information in ILLiad for a particular requesting library, you won't have to match that library the next time you download requests from them and ILLiad will automatically select that address record. This will make your addresses more accurate while also making the address verification process easier and faster.

### *Can we have separate email addresses for an address record – one for borrowing and one for lending?*

Not yet, but that's another great idea. We will look at allowing staff to set a borrowing email address as well as a lending email address for all address records in ILLiad. Currently, though, there is only one email address field for each library

## OCLC Interfaces

### *How do incoming OCLC or DOCLINE requests match addresses to fields in ILLiad?*

When new requests are imported into Lending from either OCLC or Docline, ILLiad checks the shipping and billing information provided with the request to the ESPShipTo and ESPBillTo fields for that OCLC or Docline symbol in your local address table. If the two match \*exactly\*, ILLiad selects that address number as the appropriate address record. If ILLiad cannot find a match, it does not select an address number and staff is prompted to choose an address on the new address pop-up form after opening the request. Once staff selects that address, ILLiad records the shipping and billing information into the ESPShipTo and ESPBillTo fields for that address record. Those fields are used only for verifying the correct address and do not affect your actual shipping and billing addresses used.

### *Will Version 7.2 automatically correct any duplicate entries we make have in our address table?*

Unfortunately, while ILLiad 7.2 can help prevent future duplicates of library addresses, it cannot automatically remove the duplicates you already have. You can merge the address records from the Lender Address Maintenance form in the Client, or if your duplicates are rampant, contact OCLC customer support for help with a database query to help clean them up.

### *When ILLiad marks a request as Shipped on OCLC, how long does the lending library have to “undo” that shipped message and return it to Pending status?*

Currently, OCLC allows the “undo shipped” message to be sent on a shipped request up until the borrowing library marks it as received or until the end of the day you shipped it.

### *Will there be an “undo” option for the OCLC Received status on the Borrowing side of ILLiad?*

This topic came up at the OCLC WorldCat Resource Sharing User Group in Seattle. While it doesn't exist yet, it is something that Atlas and OCLC development staff will look into for a future release soon.

### *How often does the 7.2 Connection Manager download from and update to OCLC?*

The 7.2 Connection Manager still downloads lending requests every 10 minutes from OCLC. The major change in processing timers is that the Connection Manager no longer downloads all requests in OCLC categories every two hours, but requests all items that have changed on OCLC in the last 12 minutes every 10 minutes (to make sure none slip through the cracks). The Connection Manager then does a “re-sync” of requests at midnight and noon local time to make very sure no requests have slipped through the cracks. Lending Shipped updates are the only updates that happen immediately because those can be un-done within the client.

## **Overdues**

### *Are e-mail and print available for both Borrowing and Lending overdues?*

Yes, you can choose to email and/or print overdues for each of the 3 overdue severities in both Borrowing and Lending. The settings for those checkboxes are saved on each local machine, so once you change a setting, it will remain that way the next time you open the client on that machine.

### *Can the first overdue be a courtesy notice warning that the item is due soon?*

Yes, in both Borrowing and Lending, you can set the first notice to be a courtesy reminder instead of an overdue notice. The grace days customization key would be set to a negative number to subtract those number of days from the due date and start sending emails \*before\* the item is due, while the one and two days (for second and third overdues) would still be 0 or a positive number.

### *Does ILLiad attempt to e-mail all libraries regarding their overdues or just those with valid email addresses?*

ILLiad will only attempt to email those users or borrowing libraries with a properly formatted email address.

## Miscellaneous

### *Will Version 7.2 of the Odyssey Manager handle pdf files in addition to tiff files?*

Because of compatibility issues with previous versions of the Odyssey Manager, the option to allow Odyssey to transport pdf files in addition to tiff files has not yet been added. This is something we know you all are excited to use and we hope to include it in a future Odyssey Manager release very soon.

### *Is ILLiad 7.2 still compatible with Ariel 3.3?*

No changes have been made to affect ILLiad/Ariel compatibility, so you shouldn't see any changes with importing Ariel files into ILLiad.

### *Can we route to Document Delivery from the Copyright Clearance form?*

No, but that's the third great idea in this FAQ so far! It's on our development list to look at for a future release to make that process easier for staff.

### *Will the reports we've created in Microsoft Access still work after the upgrade?*

While ILLiad 7.2 does have some new fields in tables, no current fields have been edited. Your Microsoft Access reports will still work after upgrading to ILLiad 7.2. We also encourage you to experiment with the Custom Search tab on the General Search form to create simple queries that you can easily share with your colleagues.