

OCLC ILLiad Version 7.2 Overview

Completely Redesigned Web Interface

The new ILLiad 7.2 web interface has been completely redesigned and includes new web pages for Borrowing, Lending, and for the ILLiad Web reports. The new interface is completely done in CSS, allowing you more control than ever in deciding how the web pages look for your customers. New abilities have also been added including RSS feeds for notifications, a search function that allows users to find any of their ILLiad requests from the main menu, the ability for users to reset their own passwords, and the ability to allow users to undelete electronic delivery items that they accidentally deleted.

The new Lending web interface is totally redesigned and now allows sites to register themselves via the web as well as resubmitting and renewing requests and viewing notifications.

The new interface design also allows you to customize information displayed down to the table and column level. You can add, remove, and rename columns in tables at will. The new main menu display in ILLiad gives your users quick access to all of their current request statuses as well as new ILLiad-based System Alerts that you can issue for the entire system all the way down to individual users.

Upon updating to ILLiad 7.2, you must use the new ILLiad web pages for the Lending module and for the ILLiad Web Reports. The current ILLiad Lending and Web Reports pages **will no longer work**. Your current ILLiad Borrowing web will continue to work with the new DLL. Any CSS you are currently using on your web pages will be automatically applied to the tables and other pieces of the ILLiad web pages, so you may want to preview your current pages using the ILLiad Web Previewer before updating. By default, the web pages are not replaced for any modules of ILLiad.

Once updated to 7.2, you can use the new Test Web feature to test web page edits on your ILLiad server without having to interrupt your service or have a backup server.

Web Authentication Redesign

The ILLiad web authentication modules have been completely redesigned as well. ILLiad now offers LDAP, RemoteAuth, PatronAPI, ILLiad Exclusive, and standard ILLiad authentication methods. All modules have been extended to allow for ILLiad exclusive and standard authentication methods in addition to the main authentication method.

The ILLiad web also allows for emails to be sent to customers who reset their passwords as well as customers who are automatically cleared during registration but still need a welcome email. These are provided with the update and are called PasswordReset.txt and AutoClearCust.txt and need to be placed in the email directory on the machine with the ILLiad web server.

ILLiad Web Previewer

With the complete changes in the web side of ILLiad, we've built in a way to test new pages before you upgrade as well as test new designs after you've implemented 7.2. The ILLiad Web Previewer allows you to view, edit, and generate ILLiad 7.2 specific web pages without using a web server. The application replaces all the ILLiad specific tags with plain HTML on a page by page basis so that you can edit the pages and the CSS files and view the results without having to replace pages on the ILLiad web server.

The Web Previewer includes the pages for ILLiad 7.2 in the DefaultBorrowing and DefaultLending folders. You can also choose a custom folder and select a separate set of ILLiad web pages (including prior version of ILLiad pages).

You can get more information about the Web Previewer and the download here:

<http://www.atlas-sys.com/community/index.php?topic=160>

Lender Address Updating

ILLiad version 7.2 allows you to better track current library addresses as well as any new addresses necessary. When OCLC or DOCLINE requests are imported, ILLiad verifies the ShipTo and BillTo information with specific fields stored in the address table to match up the appropriate address. If those fields match on the information provided by the library, ILLiad still uses the address format that you customized the first time you received a request. ILLiad also warns you if you attempt to add an address that is identical to an address already in the system for that symbol. This helps ensure that requests from symbols with multiple addresses are sent to the appropriate address and prevents duplicate addresses from being created.

If a library edits its address information, ILLiad will prompt you to either edit the address or create a new one. The address selection form has been modified and expanded to better copy information from the incoming request automatically.

Automatic Switching of Loan and Article Information

In ILLiad 7.2, when you switch a request from an article to a loan or vice versa, the system will automatically fill out the appropriate fields for you in ILLiad, prompting you for a review if information already exists in the fields. This works on any form where you can switch between an article and loan request type.

Lending Notifications via Email

The Lending Notification system has been rewritten to allow notifications of cancellations, renewals, and overdues through email for libraries with a valid email address. Notifications in both Borrowing and Lending are also available via a Notifications option on the web interface and via an RSS feed.

Sample emails for lending notifications are provided in the update as LendingCancel.txt, LendingOverdue1.txt, LendingOverdue2.txt, and LendingOverdue3.txt. You will need to put these in your local ILLiad email folder.

Custom Searching in the ILLiad Client

The Custom Searching interface in the ILLiad Client has been redesigned with this release. You will be able to create more complex queries and save them, along with the report structures for each one. These report packages will also be sharable via the Community Portal with other ILLiad sites.

Email Manager

The new ILLiad Email Manager will be available on your ILLiad server. When using the Email Manager service, each individual client will no longer send emails to your email server. Instead, all emails are stored on the server in the EMailCopies table and are sent out by the service every 2 minutes. This makes securing your SMTP server easier because you can restrict access to a single IP since only the server sends emails.

The Email Manager also allows the error handling for emails to be removed from the processing steps in ILLiad. A new tab on the System Information screen will show pending and failed emails and allow you to resend them. The red stop sign will appear when any email failures occur.

By default, the Email Manager service will be installed with the update, but will not be used. To use the Email Manager, you must set the EmailManagerSupport key to Yes. The Email Manager uses the EMail SMTP customization keys, so you may also need to edit these before switching.

Database Manager

The Database Manager has been revised and will be available as part of ILLiad 7.2. This tool will allow you to remove unwanted data from your tables as desired. You can also use it to clean out test requests from new system implementations.

OCLC Web Service Updates

The OCLC Web Service has been updated to version 1.2 in ILLiad 7.2. This includes both the OCLC SRW Web Service (that ILLiad uses for searching and displaying holdings from WorldCat) and the OCLC ILL Web Service (which ILLiad uses for sending and downloading requests and updating statuses).

Deflection has been added to the SRW service to allow for ILLiad sites to view filtered lender strings based on the Volume and Year in the ILLiad request.

The ability to search OCLC for the ILLiad TN is available and the uploading and downloading processes are more efficient, as the system checks for items that have changed and not every request in a category.

Lending Shipped updating is now real-time. If a mistake is made, there is a new option in ILLiad to “undo” a shipped message on OCLC that is available until the other site marks the item as received. If there is a connection error during the real-time updating, ILLiad will store the update and the Connection Manager will run it on its next scheduled connection time, currently every 10 minutes.

ISO Compatibility Update

The ISO system in ILLiad has been updated to allow compatibility with VDX.

Additional Updates

The update process will be improved in this release of ILLiad. A single release update will now be available, eliminating confusion over current components with different version numbers. Also, the backup process that is built into the Updater will only backup the SQL Database one time for the entire update process (instead of once for each ILLiad update step) - this will save disk space and time for sites with larger databases.

A web service that interfaces with the RAPID system will be available shortly after the general release of ILLiad 7.2. If you want to use this new RAPID web service, you must be on version 7.2 of ILLiad.

The Odyssey Helper application will be updated and be released as a new component of ILLiad shortly after the general release of ILLiad 7.2. This application allows you to take image files from other applications and easily send them through ILLiad and Odyssey to other ILLiad systems, including updating online systems (OCLC, DOCLINE) and billing.

ILLiad 7.2 Release Date

ILLiad 7.2 will be released on January 30th, 2007.

OCLC ILLiad Version 7.2 Release Notes

These release notes include a list of items that were changed and improved in ILLiad 7.2, including fixes for various issues. It is broken down into the major/minor component in ILLiad from a technical standpoint.

Before You Update

The following things must be completed to ensure a successful update to ILLiad 7.2.

- Fill out the three new web keys in the Customization Manager: WebURL, LendingWebURL, and ReportWebURL. If these keys do not have your web server address in them, ILLiad will not function correctly after the update. An example setting for a WebURL would be: <http://www.atlas-sys.com/illiad/>
- Copy the emails from the ClientUpdates (7.2.0.0) and DLLUpdates (7.2.0.0) to your local email folder, usually c:\illiad\email\. The following emails are new:

For the client

- LendingCancel.txt
- LendingOverdue1.txt
- LendingOverdue2.txt
- LendingOverdue3.txt

For the server

- LendPasswordReset.txt
 - PasswordReset.txt
 - AutoClearCust.txt
- No ILLiad web pages are replaced during the update. The sample 7.2 pages are included in the DLLUpdates folder in the ILLiadWebPages directory. After updating, your Lending web pages **will not work** until you make a lending subdirectory with the new pages in it and the new ILLiadLending.dll file. You will also have to add that DLL to the web service extensions for Windows 2003 server machines.
 - You must also replace the default ILLiad Web Reports pages after updating. The new ILLiadReports.DLL will not work with the old pages.

ILLiad Client

Add Request Form

- Accept Non-English now defaults to No on the Add Request form.
- List of options for ReceivedVia is determined by values in AddRequestReceivedViaOptions customization key and is no longer hard-coded.
- If there is a single quote in the Borrower Symbol, ILLiad will prompt staff to correct it and not submit the request to an incorrect status or give a syntax error.
- If staff attempt to add a request for a library that blocked, the client provides a warning but allows staff to override it and create the request.

Address Maintenance

- When clicking on the clear button to clear values from the Address maintenance form, all values will now clear. Previously several fields were not clearing out.
- On the Check in from Lending Library form, if no address exists for the lending symbol, or if a new address needs to be added, a new form is used to better complete the address information.
- If staff attempt to add an address that is identical to another address in the database, the client will warn them and ask if they want to add it. Staff can override the warning and add the address, but it defaults to No.

Alerts

- Alerts can be added in the ILLiad client for Borrowing/Lending, a user status, username, delivery location or borrowing symbol (for the lending web). These alerts show on the 7.2 ILLiad web pages.

Billing

- If billing is not active for the current module, the Show .. Billing menu option is disabled.
- If BillingActive or BillingActiveDocDel is set to Yes and there is no account number selected for a request, ILLiad warns staff and will not let them add any billing charges to the request until an account has been selected/created.

Borrowing Overdues

- Borrowing overdues allow staff to choose which overdues to send and if they want to send an email and/or print overdue letters. Borrowing overdue letter Word document templates can be entered into BorrowingOverdue1Docs, BorrowingOverdue2Docs and BorrowingOverdue3Docs customization keys and will auto open after printing if those documents exist in the PrintDocumentsPath location.

Cancellations

- EMailRouting entries can now have a name of Cancellation. Before it was a reserved word used in other parts of the client.
- Before allowing staff to cancel a request and send an email, the client verifies that the email address exists and is in a valid format. If not, it displays a warning message for staff to correct.
- Choosing to edit a cancellation email before sending before sending automatically checks the option to send the email. This prevents staff from accidentally turning off the option to send the email while attempting to edit it.

Check In from Customer

- If marking a request as In Transit, the cursor will return to the TransactionNumber after updating the request. ILLiad will also check that the request has only one piece and if there is more than one, it will warn the staff.
- When checking in items that are at status In Transit, it moves them to Awaiting Return Label Printing and not to Item Not Picked Up.
- ILLiad includes items at Awaiting Renewal Request to the list of transactions searched by default when checking in items from the customer.

Check In from Lending Library

- Notify Electronic Delivery button no longer gives errors of Missing Right Quote or Address number not found.
- Notify Electronic Delivery button moves the request to a transitory status for statistics before moving to Delivered to Web and marks the transaction as “copyright already paid” if filled by a copyright payer.
- Double-clicking on the notes section of the Check In from Lending Library form with no request selected no longer gives errors.
- If the pieces field has a very large number in it, ILLiad warns staff when checking in the request from the Lending Library. This is usually when staff type the ILL number into the pieces field and ILLiad would then try to print over a million copies of the labels.
- Check In from Lending Library form shows volume, year and pages information in addition to title and author.
- Search criteria can be cleared via a clear button on the Check In from Lending Library form.
- Clicking on Cancel Request from the Check Items in from Lending Library form now enables the cancellation form. Previously, it wouldn't do anything.

Check In from Returning Library

- Address fields are read only on the Check In from Returning Library form. In a later version this form will have an option to edit the address.
- On the Check In from Returning Library form, you can now view the entire record for a transaction by clicking on the View Record button.
- When checking in a request from the returning library, ILLiad adds a tracking and history entry that the request was checked in before moving it to Request Finished. This helps verify that it was checked in (and updated on OCLC) versus just changing the status manually.
- The OCLC status is now visible on the Check In from Returning Library form in Lending

Clear Customer Form

- If switching from one user to another, the NVTGC field will change along with all the others. This was only happening in a particular order of clicking on users.

Copyright Clearance Form

- If the PhotoJournalYear field holds more than just the year and can be parsed by the client, ILLiad will parse the month into the month field and display the old and new values on a pop up form for the staff to confirm.
- After saving copyright information, the next request in the list is selected and searched.
- If the list of items at Awaiting Copyright Clearance is in an order other than by TransactionNumber, after clearing a request, it will choose the next request in the list as opposed to the lowest TransactionNumber in the list.
- The copyright default query now takes into account the date the request was submitted as well as limits by shared server location by default.
- Before marking a request to change the status on the Copyright form (No Problem, Cancel, Save Copyright Information, etc.), ILLiad verifies that the request is still at status Awaiting Copyright Clearance. This is a safeguard in case two staff members try to process Copyright at the same time.
- MaxCost can be added to the list of fields to display on the list of item Awaiting Copyright Clearance. It does not display by default but can be added by right clicking and choosing Field Chooser.

Custom Queues

- If Awaiting Request Processing is in the CustomQueues table, it no longer opens two forms of those requests. Awaiting Request Processing is a standard processing queue and does not need to be in the CustomQueues table.

Customer Clearance

- When disavowing customers in the client, all active requests are cancelled and the ReasonforCancellation is set to "Customer Disavowed"

Doc Del Update Stacks Search Form

- The document delivery update stacks search form now has a check box to indicate if the customer prefers electronic delivery of articles.

DOCLINE Import

- When importing Docline requests from the web, ILLiad only grabs the symbol for ISO requests and not the symbol plus "ISO Borrower".
- When importing Docline requests from the web, it will not grab extra characters after the ISSN field.
- When importing Docline requests from the web, the client parses the ship to and bill to fields into the address fields and checks those against any new requests imported to auto select the appropriate address.

Edit Customer Form

- When editing a customer from the Show User Info form, it does an exact username search so only that one user record shows in the results. Previously it was searching by username but would show any results where the username was part of another username.
- Lending, Unmatched, site code symbols and other system users no longer display on the Edit Customer form or Clear New Customers form
- If the staff user cancels out of changing the user's delivery location, it redisplay the user information and does not clear the form
- All user account fields display in the account section at the bottom of the Edit Customer form and are editable by staff.
- Ctrl+S saves changes to the selected customer on the Edit Customer form.
- The Edit customer form has a check box to indicate if the customer uses ILLiad authentication or the value from WebAuthType in customization (LDAP, PatronAPI, etc.)
- Staff can now add a new user to ILLiad from the Edit Customer form without having to use the ILLiad web pages. The AuthType field for the user added through the client is always ILLiad and does not authenticate using LDAP or PatronAPI.
- Staff can edit customer accounts within the client on the Edit Customer form.
- Custom Search tab has been updated for all three modules to allow for unlimited conditions, customized results and the ability to save and open reports.

Edit Request Form

- Custom Search tab has been updated for all three modules to allow for unlimited conditions, customized results and the ability to save and open reports.

Electronic Delivery Form

- When checking for electronic delivery addresses from Ariel requests to choose a lending library symbol, ILLiad also verifies that the SystemID is the same. This ensures that if the same ip address is used by both an OCLC and Docline symbol, the correct symbol is assigned to each request.
- If the user is Exempt, the billing form will not display for requests delivered from the borrowing Electronic Delivery form.
- Printing a single page from the Electronic Delivery form no longer prints a second blank page afterwards.
- If there is no ArielPath key found (or it is blank), ILLiad does not give an error. This allows sites who do not use Ariel to leave that field blank.
- If a request imports from an Odyssey standalone client and the item does not match an ILLiad request, deleting the request marks the request as Deleted in the OdysseyReceived table and it will no longer import again as a dummy item.
- The lending library symbol displays at the top of the Electronic Delivery form with a button to view details about that lending library's address.
- The non-Odyssey method of sending requests from the local processing machine to the ILLiad web server has been removed. Files can only be transferred from the client to the server via Odyssey where they are converted to PDF on the server and emails are sent from there.

Email

- The carbon copy field for outgoing requests now sends as the cc field and not the bcc field. In previous versions the email was going to those addresses in the cc field, but as a blind carbon copy.
- Scheduling the Email Import will import emails as new requests to borrowing. Previously only choosing the menu option in the client would import those requests.
- If viewing emails sent under Show .. Email, there is an option to resend any emails in the list. It changes the status of that outgoing email to Pending and adds a note to history. This is only possible if EMailManagerSupport is set to Yes.

General Search Form

- If you right-click on a set of search results to change their status, a message dialogue verifies what status you are about to send those requests to.
- Right-clicking on the header of results gives the option to Remove All Columns (except the TransactionNumber). This makes it easier to add back the few fields you wish to display instead of removing the dozens of fields you don't need.
- In Lending, the user search fields have been replaced with library name, patron etc.

General Update Form

- On the General Update Form, there is no longer an option to Change Status To ... Item Returned. That status is no longer used.
- If importing call number and location from Z39.50, those fields will be saved by Save Changes (because they are now recognized as edited fields).
- If a request doesn't have a SystemID of ISO, the ISO tab does not show (as opposed to being disabled) so that if paging through requests that may or may not be ISO, the ISO tracking is not confusing.
- The dropdown for DocumentType is populated by the DocumentTypeOptions customization key and is no longer hard coded. Loan is no longer in that list.
- The EntryDate for invoices received from lending libraries now is entered by Staff and is not overwritten/updated by saving changes on the General Update Form.
- The [...] button next to the Lending Library symbol displays the address maintenance form with either that symbol or that specific symbol and address number selected. This allows staff to edit the address information from that form.
- On the General Update Form, staff can choose to remove the copyright payment information under the Process menu. This is to correct items that were marked for copyright payment by mistake without marking them as copyright already paid.
- Under Show .. User Info the form now has all the same fields as those on the Edit Customer form. There is still a button to edit the customer information from that form.
- In Document Delivery, if there is no billing account selected and BillingActiveDocDel is set to Yes, ILLiad will warn you to choose an account.

ISO ILL Processing

- ISO ILL requests that come back as conditional messages and are replied with a no will go to a status of Awaiting Conditional Reply No. Once the ISO Manager and ISO service have updated that request it will either move to the next lender and go to Request Sent or move to Awaiting Unfilled Processing if there are no more lenders.

Lender Address Form

- If SSSLenderAddressesALL is marked as Yes, ILLiad will only check that the address selected is being used by that site before allowing staff to delete it. Previously, it was checking all shared server processing sites.
- ILLiad will not allow staff to merge two addresses if there are any entries in InvoiceSessions for that address record that are not cancelled.
- ILLiad will not allow staff to add an address entry with a blank library symbol, library name or primary address field.
- When resetting a password for an address, ILLiad resets the password for all address numbers under that symbol and not just the one selected. It is assumed that they should all be reset because the Lending web doesn't allow different address numbers to login separately but only checks the password of the first entry in LenderAddresses for that symbol.

Lending Cancellations

- If there are no new notes added when processing a lending request, it does not take the imported borrowing note and add that to OCLC lending notes, but leaves lending notes blank.

Lending Overdues

- Overdue notices in Lending now allow for emailing borrowing libraries who have provided an email address. Overdue notices can also be printed for all items or only those items that don't have a valid email address provided. The Lending overdue letters are stored in three Customization keys - LendingOverdue1Docs, LendingOverdue2Docs and LendingOverdue3Docs - and will auto open after printing if those documents exist in the PrintDocumentsPath location.
- The dbf files used by the Word documents have changed slightly so that LIBRARYNAM now indicates your library name from LocallInfo and LIBRARYN_1 is the library name field from the borrowing library's LenderAddresses entry. You may need to edit your Word document templates to adjust those field names.

Lending Printing

- In addition to the StacksL.dbf and StacksP.dbf for Stacks Search printing, ILLiad also creates a Stacks.dbf file that is a combination of the two files. ILLiad also creates a ShpStks.dbf file that is a combination of the ShpStkL.dbf and ShpStkP.dbf files for Shipping Label Printing in lending.

Lending Request Form

- Reference number now displays on the Lending Request form.
- The Lending Request form has an option to view the OCLC status if an OCLC request.
- Before routing a request from one shared server site to another from the Lending Request form, the client saves the form (in particular the call number and location) before routing.
- The Address section of the Lending Request form has been redesigned to better fit all information. Any edits necessary can be made by clicking the Edit/Add Address button. ILLiad will automatically copy the BillTo and ShipTo information from OCLC or Docline into the address fields for a record. If the BillTo and ShipTo information matches that the ESPBillTo and ESPShipTo fields in LenderAddresses, the address is selected automatically. Otherwise, the address selection form automatically pops up for staff to choose the correct address.
- When receiving a request from a symbol not in LenderAddresses, the address from OCLC or DOCLINE automatically parses into the LibraryName and Address1-4 fields. Staff can then edit those fields before adding the new address to the database.
- The address form that pops up if no addresses are found to match has a link to the Policies Directory next to the symbol field labeled "PD."

Lending Update Stacks Search Form

- When marking items as found, ILLiad will verify that that library symbol *and* address number is not set to Exempt before skipping billing.
- There is now a button on the Update Stacks Search form in Lending allowing staff to mark an article as found and scan immediately for Odyssey sending instead of routing to Awaiting Odyssey Scanning.
- When returning to the Lending Update Stacks Search form after hitting the View Entire Record button, the update stacks search form refreshes.

Lending Web

- If a library is marked as blocked in ILLiad, they cannot submit a request over the Lending web.
- Requests submitted over the lending web can be sent using Odyssey based off of the address on file for that library. The request submitted automatically gets the BorrowerTN and BorrowerNVTGC fields filled out.
- All Lending Requests from the web pages have a SystemID of LWeb. Those items are not marked for updating on OCLC etc and are treated as their own SystemID.

- Lending web requests cannot be Conditionalized. They can be cancelled and then resubmitted by the requesting library via the lending web pages.

Logging

- All logs hold 100,000 entries for each service instead of 10,000 to prevent useful troubleshooting information from being removed too soon.

Main Menu

- Renew Item for Customer removed from the Check Out/In menu on the main menu. This menu option is no longer used.
- Under the maintenance menu on the Main menu, there is an option to open the ILLiad web reports that uses the key from ReportsWebURL.
- If staff double-click on a menu that is no longer valid (those requests are no longer at that status) the client will display an error message saying there are no requests at that status and will refresh the Main Menu. Previously it would give an index out of bounds error.
- Default menu options such as Search Faculty Express requests, NTIS requests, etc were removed from the requests menu. If using those options, they are accessible from the custom queues.

Notifications

- The email templates for Borrowing and Document Delivery multiple items notifications can contain LocalInfo tags.
- Lending emails use the LendingEMailFromAddress and LendingEMailFromName customization keys instead of the EMailFromAddress and EMailFromName keys.
- The <#LibraryName> tag in email templates now indicates your library name from your LocalInfo table. The <#LenderAddressLibraryName> tag is a new tag to indicate the library name field from the borrowing library's LenderAddresses entry. You may need to edit your email templates to adjust to this change.

OCLC Request Form

- Billing notes now displays on the OCLC request form to enter information from constant data, WorkFormMapping or manually. It also displays on the OCLC request to read later or in Lending.
- ILLiad no longer pre-loads the state holdings when using custom holdings. Previously, it would display the state holding first if that code matched one of your OCLC custom holdings groups names.
- If the request is at a Special Message status on OCLC, the Delete and Save menu options are greyed out.

OCLC Resource Sharing Settings

- If you attempt to add a custom holdings group, path or constant data entry that already exists, ILLiad gives an appropriate error that that entry already exists. Previously it was returning a generic error from OCLC.

OCLC Search Form

- If you tab to the Add button on the Manual entry form and then click Enter to add the symbol, it will now only add that symbol once instead of twice.
- If a library symbol is in the EMST table, it marks them with a 2 superscript, while still leaving them lowercase.
- When right-clicking on a symbol and choosing "View Policies Directory for ABC" it will only show that specific symbol and not any symbol that contains those letters.
- On the OCLC search form, there is a menu option to allow ILLiad to automatically suggest a lending string for serials based off of local holdings (volume and year). If this is unchecked, ILLiad will not suggest any lending string. This is also true for Direct Request.

Post Receipt Processing Form

- If there are multiple pieces for loans, both the loans and articles will auto open the Word documents. Previously the articles would not auto open if there were multiple pieces for loans.

Pre-Processing Form

- The pre-processing form (with the list of requests at a given status) shows the number of items at that status at the top of the form.

Request Forms - All

- Diacritics display correctly on all ILLiad forms.
- Change Status To ... menu option is now on the General Update form, the Lending Request form and the Borrowing Request form.

Request Types

- On the General Update form, Request form, Lending Request form, Check in from Lending Library and Update Stacks Search form, staff can change the request type from article to loan and vice versa and ILLiad will copy relevant fields to the corresponding citation fields.

Return Printing

- The Return1.dbf file will import into Word documents as an option instead of Returns.dbf. Return1.dbf only prints one label for each Transaction and not one for each piece.

Scanning Forms

- The Deliver button grays out while the request is processing to the client and the other fields (TN, ILL Number) are disabled to keep the request from changing. If staff would like to start over with a new request, they can click the reset button.
- The TWAIN source will stay after closing and reopening the client. Previously it would reset to the default each time the client was opened.
- On the scanning forms, staff can search by ILL Number in addition to Transaction Number.
- If viewing pages at less than 100%, the text is scaled better for improved readability on the form.

Update Script

- More OCLC workform fields are automatically populated for blank workforms from data in the ILLiad request. This can be edited or removed in the WorkFormMapping in the Customization Manager.

Z39.50 Search Form

- There is now a menu option to turn on or off the copying and pasting of call number and location information by single-clicking. If turned on, it requires a double-click to copy the call number and location information.

ISO ILL (ISO Manager and ISO Service)

General

- ILLiad verifies that when receiving messages on the receiving side of ISO the Transaction Number that was given exists in the database before adding notes etc.
- When replying No to an Conditional message as a borrower, the request temporarily moves to Awaiting ISO Conditional Reply No. After a minute, the ISO Manager moves the request to Request Sent for the next lender or back to Awaiting Unfilled Processing if that lender is the last in the string.
- ISO ILL within ILLiad is compatible with sending to and receiving from VDX systems.
- Log entries increased from 10,000 to 100,000

Connection Manager

General

- When importing OCLC requests, ILLiad also looks in the Email field for the Ariel tag to mark the request as an Ariel Shipping Method.

- ILLiad only looks in the ISxN field for the ISSN or ISBN and does not attempt to parse it from the Verified field. It has its own field in incoming requests now.
- The Connection Manager will only move a request to Awaiting Denied Renewal Processing if the current status is *not* Request Finished, In Transit or Awaiting Return Label Printing.
- Connection Manager checks every 10 minutes for any items that have changed on OCLC within the last 12 minutes to update information between OCLC and ILLiad. This is different than previous versions that would check categories such as Shipped on OCLC every two hours and verify every request in that category. This should make any discrepancy between OCLC and ILLiad minimal and reduce any load on the ILLiad and OCLC servers.
- Pending lending requests are still downloaded every 10 minutes, but as part of the timestamp downloads instead of a specific Pending download.
- When the Connection Manager service starts (usually at midnight) and approximately 12 hours after that, the service does a “re-sync” of all categories to ensure no requests are out of sync with those in ILLiad.
- If the Billing Notes is not blank for incoming lending requests, the Connection Manager will add a note to the request similar to Borrowing Notes with the billing notes for that request.
- When cancelling a lending request, only the last note with a notetype of Staff is added to the lendingnotes field in OCLC. This prevents the downloaded borrowing notes from being sent back as a lending note to the borrowing library.
- When importing lending requests, ILLiad compares the OCLC ShipTo and BillTo fields to the ESPShipTo and ESPBillTo fields in LenderAddresses to look for a matching address. Those fields don’t get filled out until staff select an address in the client, so the initial download of requests in lending after the update to Version 7.2 will require some address verification before any addresses will match up on subsequent Connection Manager downloads. It may sound like a pain, but pre-release sites have raved about it and it helps ensure much better address accuracy without losing any of your customized addresses you already have.
- The Connection Manager will attempt to update a borrowing request to Received 24 times by default (every 10 minutes). If there is an error, it will only mark that in the History table on the first and last attempt.
- Log entries increased from 10,000 to 100,000.

Odyssey Manager

General

- ILLiad can read and attach coversheets created using Adobe Acrobat version 7.
- The Odyssey Manager no longer uses a separate DLL (wPDF2000a.dll) for converting tiffs to PDF files but uses built-in components.
- Non-letter sized pages can be converted to PDF and retain their original dimensions.
- The lending library symbol used in the header for incoming requests is used to mark the lending library for borrowing requests instead of waiting for a Shipped message on the external system to update ILLiad.
- Log entries increased from 10,000 to 100,000.

Billing Manager

General

- I/O error 32 corrected when generating reports as text files (instead of the default dbf and report files)
- The Printer Setup button is no longer on the menu - it is not used.
- Additional fees 2 and 3 allow staff to add and edit those fees within the Billing Manager. Previously, those dropdowns were blank.
- Indexes added to the Transactions table make the Billing Manager display previous invoices must faster.
- Payment amounts can only be two decimal places to prevent non-monetary values.
- Staff can only void a payment once and not multiple times (which would add a credit to the balance).

Admin Tools

Auto Updater

- The Version 7.2 Auto Updater automatically selects all pending updates by default. If you do not use the ISO Service or ISO Manager, you can choose to not install the services during the update but will still get all the same database changes.
- The Auto Updater creates a backup of the database before each update. It uses the backup path and backup file name specified in the updater but also appends the date and time to the filename to ensure a unique name (i.e. ILLiadUpdaterBackup20070130113015). This will better define the date and time of the backup, but will also prevent the backup file from getting too large.
- If the backup fails, the Updater will return the backup error and allow staff to exit out of the update and not continue.
- The Replace Web DLL and Replace Lending Web DLL commands in the update replace all copies of the illiad.dll and illiadlending.dll files in any subfolders under the web path.
- The Add Web File, Add Reports File and Add Lending Web File commands in the update add the file specified to every subfolder under the web path where there is an illiad.dll, illiadreports.dll or illiadlending.dll, respectively.
- The Auto Updater has an UpdateStub.exe file added to the admin folder (where the ILLiadUpdate.exe file is). This file will allow the Updater to replace itself in future update releases.

Customization Manager

- Staff no longer receiving a duplicate 'Are you sure you want to discard your changes?' message after saving changes to the Z39.50 configuration.
- Error of 'Cannot focus a disabled or invisible window.' no longer appears when adding new Z39.50 servers, and clicking on New while the active tab is Searches.
- Staff can view and edit ILL entries for WebFormValues in Customization Manager if shared server.
- UserValidation and DefaultAccounts tables editable within Customization Manager to allow staff to edit entries in those tables. Shared server installations can only edit entries for their NVTGC codes.
- The More Information button in the Customization Manager searches the Atlas Systems Knowledge Base powered by Google.

Database Manager

- Database Manager deletes appropriate transactions for Lending, Borrowing and Document Delivery when deleting process type specific items.
- Database Manager allows staff to edit the starting invoice number and begin date for going live with the Billing Manager, override the default date based off of previous invoices.

Electronic Delivery Cleanup

- The Electronic Delivery Cleanup program cleans out alerts that are more than seven days expired.

Web DLL

Authentication

- ImportValidation has been changed to use a new table called UserValidation. It behaves similarly, but allows for more information by default to import from the UserValidation table during registration.
- Blocked customers can still login to ILLiad but can not submit any new requests. This allows them to view their overdue items or any other requests on their account, but not create new requests. Disavowed users are still not allowed into ILLiad at all.

- Users can register themselves through the web interface even if LDAP or RemoteAuth authentication is in place. This means that those authentication methods are no longer exclusive.
- For LDAP authentication, if the search filter contains more than one \$uid tag, they are all replaced with the username value.
- PatronAPI authentication allows customers to use any user field (i.e. the Username field instead of SSN or Number) to validate against the PatronAPI server.
- After an LDAP or RemoteAuth user has authenticated but doesn't exist in ILLiad, it first attempts to display a NewAuthRegistration.html page for the customer to edit information without selecting a username and password. If that page doesn't exist (it doesn't by default) the DLL sends the new customer to the ChangeUserInformation.html page to edit his/her information without creating a username and password.
- A customization key of AutoClearPreregisteredUsers determines if customers who register through LDAP, RemoteAuth or PatronAPI should be automatically cleared.
- If AutoClearPreregisteredUsers is set to Yes, ILLiad also checks that AutoClearSendEMail is set to Yes and that EMailManagerSupport is set to Yes before generating a welcome email for the Email Manager to send to the newly registered customer. AutoClearSendEMail is set to No by default when updating.

Billing

- When a new customer registers, if BillingActive *or* BillingActiveDocDel is set to Yes, ILLiad displays the EditAccountInformation.html page for the customer to create a billing account. Previously, it would only show the page if BillingActive was set to Yes.
- New customers can have a billing account automatically created when they register based off of his/her NVTGC and Status. Those accounts are added to the DefaultAccounts table in the Customization Manager and created for users when they register. If there is not an account specified for their NVTGC and status, ILLiad doesn't create a default account, but still displays the EditAccountInformation.html page. This new feature can be used in place of triggers on the Users table adding default accounts for registering users.

Email

- If using the Email Manager, customers who are automatically cleared (LDAP, PatronAPI, RemoteAuth) can have a welcome email sent to them automatically (by default the key of AutoClearSendEMail is set to No). The email template would live on the web server in the DLLEmailLocation and the Email Manager sends the email.

Formatting

- LocalInfo fields can be used as variables on any of the web pages. The format would be <#LOCALINFO field="OCLCSymbol">, as an example.
- All tables in the original web pages no longer have formatting hard coded into them so can be controlled via a CSS file. The formatting for tables in the new 7.2 web pages also allows for customizing which columns appear and what the headers are labeled.
- All status lines are customizable via Customization Keys in the Customization Manager and none are hard-coded.
- Tables can be sorted by any field displayed in ascending or descending order.
- On all web pages, tags can be added to show values from the Customization, LocalInfo, Users or Transactions tables.
- View request history shows both the journal and article titles in the title field.
- Generic requests save the document type from the web form instead of the name of the page itself.
- The delete button for Electronic Delivery articles is now a link instead of button to make it less tempting for customers to click. It also can be removed so that the requests stay available until the Electronic Delivery Cleanup program removes them.

Lending Web

- Lending web requests have their own SystemID of LWeb that separates them from requests entered through the client (that have a SystemID of OTH for Other). This allows for custom processing in the client as well as emails for notification.
- Lending web requests automatically get a BorrowerTN and BorrowerNVTGC value set in Transactions so that if the borrowing library provides an Odyssey IP address, ILLiad can send to them via Odyssey.
- The Lending Web allows for borrowing libraries to register themselves, reset their passwords, resubmit cancelled requests and cancel requests through the web interface.
- Patron field is available as an option for Lending web requests .
- The Lending Web uses its own web folder to separate itself from the Borrowing web pages. This allows sites using RemoteAuth to still authenticate lending users.
- WantedBy field can be added to Lending web request forms.
- AcceptAlternateEdition value is written for any new lending web requests submitted.

OpenURL

- The date value coming from OpenURL can be formatted in the OpenURLMapping table to strip out any values besides the year.
- The CallNumber field can be imported from an OpenURL resolver to an ILLiad request form by adding that to the OpenURLMapping table.
- If an OpenURL request has a list of authors instead of one, the tag is parsing correctly so that the request can be submitted and not stall. This was primarily happening with EBSCO requests and only for certain citations.
- Single quotes in the citation no longer give an error when submitting OpenURL requests.
- OpenURLLogon.html and OpenURLLogon2.html pages are no longer used and customers use the standard logon and logon2 forms. This is because the OpenURL citation remains in the URL and is no longer parsed into hidden fields on the OpenURLLogon form.
- The SLLogon customization key is used to determine the status line visible to customers logging in before submitting an OpenURL request. This displays on the Logon2.html page in the Status tag.

New Features

- When customers access a pdf file through the ILLiad web interface, it adds an entry to the History table for each time. This is only available if the customer access the file through the ILLiad web interface and not via a direct link sent in an email.
- On the 7.2 web pages, the size of pdfs at Delivered to Web shows in the table. This alerts customers to the size of the file before they attempt to view or download it.
- On the 7.2 web pages, customers can search on the Main Menu for a request by TransactionNumber, ILLNumber, Title or Author.
- There is an option on the menu to view all web requests, regardless of their status.
- On the Electronic Delivery form, if a customer clicks on the TN link it shows detailed information about that request. Clicking on the view link displays the PDF file.
- A test web folder can be added to the production web server to allow testing of web pages with live data while not affecting production web pages. The separate directory simply needs a webpath.txt file that tells the ILLiad DLL the name of that folder (i.e. c:\inetpub\wwwroot\illiad\testweb\). If using Windows 2003, the test ILLiad.DLL file would need to be added to the Web Service Extensions as well. This is an option for both self-hosted and hosted servers.
- The WebURL key allows shared server sites to have URL directories that don't necessarily match their NVTGC site code.
- Customers have the option (in all modules) to reset their password without contacting the ILL office. It sends an email to the address on file for their username with a password reset link. This allows them to reset the password without staff or customer having to know the old password, while still keeping the account secure.

Miscellaneous

- The tags for AcceptNonEnglish and AcceptAltEdition by default on the view detailed information form show the values chosen by the customer and not the web default.
- If the WebDefaultNotWantedAfterDays customization value is blank, ILLiad will display a blank field and no longer give an error from calculating the date.
- On the EditAccountInformation form, receiving a validation error no longer blanks out all fields on the form.
- Items at status In Transit are considered completed requests and show in the Request History rather than Outstanding Requests.
- The expiration date that displays for items delivered to web is calculated based off of the first date it was moved to Delivered to Web and not the date it was requested.
- OpenURL and LDAP no longer attempt to login more than once.
- In rare cases the text of the Main Menu would display twice. This no longer happens in the old or new web pages.
- When editing and resubmitting web requests, it decides whether to send it to Awaiting Copyright Clearance based off of the current request type.
- WebDefaultNVTGC is no longer used. The field was overwriting values from customers and was not necessary.
- PatronAPI authentication no longer writes any notes to the UserNotes table.
- The variables for submitting requests are re-initialized for each form. This should prevent any chance of one customer resubmitting a request and overwriting another transaction.
- If a customer cancels a request, the ReasonforCancellation is marked as "Cancelled by Customer" instead of blank. This makes statistics more specific.
- WebTNNotesFilter corrected so that the comma separated list (i.e. Lender,System) determines which note types are filtered out of the visible notes for customers on the web.
- The WebDefaultMaxCost key allows there to be a default value on the request forms for max cost.
- ILLiad first looks for Error.html as the error page to display. If that page does not exist, it attempts to display ErrorPage.html. The Error.html page is a newer format and has a variable to display the specific error.
- Error tags (for dancing exclamation points or other icons) are created dynamically based off of the field, so any field that is on a request form automatically has the option of showing an error tag.
- Web sessions and process threading within the DLL has been re-written to prevent "Webmodule1 already exists" errors.
- The form names used for the WebFormValues and WebValidation tables are the same as the formname in the html. Previously some of those form names did not match (i.e. the EditAccountForm was looking for AddUserAccount in the WebValidation table but now would look for EditAccountForm).
- On a shared server, if a customer attempts to login to the wrong web site, ILLiad will log them to the appropriate form. Previously it would redirect them to another form and force them to login a second time.

ILLiad Web Reports

All Reports

- The default web reports are in a new format to match the new ILLiad web pages. The old web reports buttons no longer work after the update, and you will need to replace your webreports folder with the folder provided during the update.
- Delivery Locations do not limit requests for single server. Also the NVTGC field for library addresses does not matter if the server is not shared server and the address table is not split.
- All reports take various SystemIDs into account, including OCLC, DOC, ISO, OTH and LWeb.
- The address information for shared server installations shows the correct address even if one site has an address #1 but another site does not for that symbol.

Delivery Time Distribution

- If limiting the report by sites, it will not give a syntax error about u.NVTGC not existing.

Electronic Delivery Turnaround Time

- Corrected syntax error if filtering by groups to match on lender string.

IF M Charges

- For shared server installations, the IFM charges report will not duplicate entries based on the split out LenderAddresses table.

Invoices Received

- The query for Invoices received doesn't require an address number in case the lending library was not completed.

Lending Requests Filled by Day

- Query for lending requests filled only counts Request Finished for articles and Item Shipped for loans. This prevents loans being counted twice.

Lending Turnaround Time

- For shipped items that are renewed, the turnaround time only counts the first time the request goes to Item Shipped and not the second or third time.

Most Loaned Journals

- Query edited to prevent duplicate entries when limiting by groups. It is matching the symbol to the value in Transactions and not LenderAddresses.

Most Requested Journals

- Query has been corrected so that showing the report for all sites gives the same results as choosing each NVTGC site code in combination.

Requests by Status and Department

- The values for certain departments and statuses corrected to show the number instead of a 0.

Turnaround Time

- Requests that have been resubmitted will only show the turnaround time based off the most recent date the request was submitted.
- Query edited for turnaround time to look for Request in Processing or Awaiting Direct Request to include Direct Request transactions.

Who We Lend To

- Single server installations can limit the Who We Lend To report by groups.