



The

# OCLC ILLiad Newsletter



Welcome New OCLC ILLiad Licensees!

Clinton Community College  
Library of Congress Sullivan County Community College  
SUNY College of Optometry  
Claremont University Consortium  
SUNY Canton  
Cayuga Community College  
SUNY Delhi  
Hudson Valley Community College  
Adirondack Community College  
College at Old Westbury  
Morrisville State College  
Suffolk Community College  
Westchester Community College  
Tompkins Cortland Community College  
Rockland Community College  
Liberty University  
University of Illinois, Chicago  
Corning Community College  
Baptist Bible College and Graduate School  
SUNY Orange  
South Texas College of Law

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## What's New at Atlas Systems?

### Ares

Ares 2.3.2 is now available. The biggest part of the release is the Blackboard™ integration as we have discussed in past newsletters. In addition, a variety of customer suggested enhancements and modifications were rolled out.

To learn more about Ares start at our website [www.atlas-sys.com/products/ares](http://www.atlas-sys.com/products/ares). Here you can sign up for one of our web demos – these are held every two weeks for your convenience. In addition, you can see the full list of all of our Regional Network Distribution partners. By purchasing through your regional network you benefit from special discounts based on the buying power of the network – and as an OCLC ILLiad user you save an additional 5%.

Join the growing list of libraries taking control of their reserves processing with Ares.

### Aeon

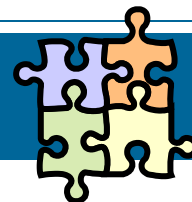
Aeon, the newest library software application from Atlas Systems, is making its way toward general distribution.

Aeon fittingly is designed to manage the operations of a Special Collections library – where the rarest and most valuable items are stored for all eternity! It has been designed in consultation with the staff of the Small Special Collections Library at the University of Virginia.

More details about Aeon will be available in the next newsletter and demonstrations will be available at ALA Midwinter in Philadelphia.

## At Your Service - Helping You Put the Pieces Together

By Kevin Ford, Customer Support Technician and New Licensee Coordinator



## Don't Panic: Basic ILLiad Troubleshooting Part 3

Greetings All. The last couple of these columns have dealt specifically with interpreting some more or less random ILLiad error messages with the intended goal of determining the nature of and correcting whatever problems might be interfering with ILLiad functionality.

This time around, I want to focus specifically on Client Connectivity issues, or in other words, problems seeing the database from the ILLiad client machine (or possibly the ILLiad web server). Problems of the client connectivity sort typically result in the appearance of this type of error message when you attempt to open the ILLiad Client:



(Continued on page 3)

Please join us in welcoming Travis Stokes who has joined the development team at Atlas!

## The OCLC ILLiad Users Forum

A quarterly feature highlighting innovations in the field of Interlibrary Loan



### To Trust or Not To Trust?

**Cheryl Hoover, ILL Supervisor, Montana State University, Billings**

The Montana State University Billings Library is a small academic library in Montana's largest city. During the last fiscal year, our interlibrary loan department processed 6,714 requests (3,171 lending and 3,543 borrowing). Of the borrowing requests 1,932 were articles. We administer a shared ILLiad server site with MSU sister campuses located in Great Falls and Havre, Montana.

In March 2006, we implemented the use of Odyssey but still previewed every incoming article before forwarding electronically to our patrons. In March 2007, I attended the ILLiad conference in Virginia Beach and returned to work committed to the idea of unilaterally designating all libraries as Trusted Senders. Now, every article sent to us by an Odyssey library routes electronically to our patrons without staff review.

Why did we make this decision?

One measure of ILL efficiency is turnaround time. Many ILL users want their requests as quickly as possible and by eliminating staff review of articles received via Odyssey we felt we could improve turnaround times. However, sending an article without review does increase the risk of the patron receiving an imperfect, incomplete or incorrect article. We created an Odyssey coversheet stating our commitment to customer satisfaction and included our contact information in case the patron found the article unacceptable in any way. While it would be ideal to send an absolutely perfect article to the patron, the reality is that the patron does not always need that level of accuracy. Sometimes they only need the references, page numbers, graphs, or to see how the article title was capitalized. We felt were spending too much staff time previewing suitable articles and that it would be worth the risk to increase the speed of desktop delivery.

With Trusted Sender in place, Odyssey requests now route magically to our patrons without us even being aware they are doing so – or even being in the office! But giving up control is not always easy for ILL people to do. We felt the savings in staff time could be better allocated elsewhere. We would handle article problems as they arose and individually remove libraries from the Trusted Sender status that frequently send articles of poor quality.

Implementing Trusted Sender required a simple change in the Customization Manager, and I also created a Custom Holdings path to include a group of free libraries who use Odyssey. We now consider libraries who send via Odyssey to be preferred over libraries that only deliver via Ariel or other means.

How is it going?

Since implementing the Trusted Sender change in April 2007, we have been notified of problems four times by patrons and feel most comfortable with that number. Interestingly, we have also discovered a change in mindset regarding our lending practices. While we strive to give fast service to all borrowing libraries, we started moving Odyssey requests to the top of the process queue in case the borrowing library is also using Trusted Sender. If the article we are scanning is of questionable quality and we feel an ILL staff person should review it before forwarding to their patron, we simply select "Disable Trusted Sender" on the Odyssey screen before sending the article. This article then goes to the ILL staff for review instead of routing directly to the patron.

We hope more libraries will begin utilizing the Odyssey software so that more and more of our articles will transmit automatically to our patrons. There really is very little risk in making all libraries Trusted Senders. If you try it and it doesn't work for you, you can always turn it off. However, I bet you will be happy you did!

### Denver Public Library Saves Paper with OCLC ILLiad

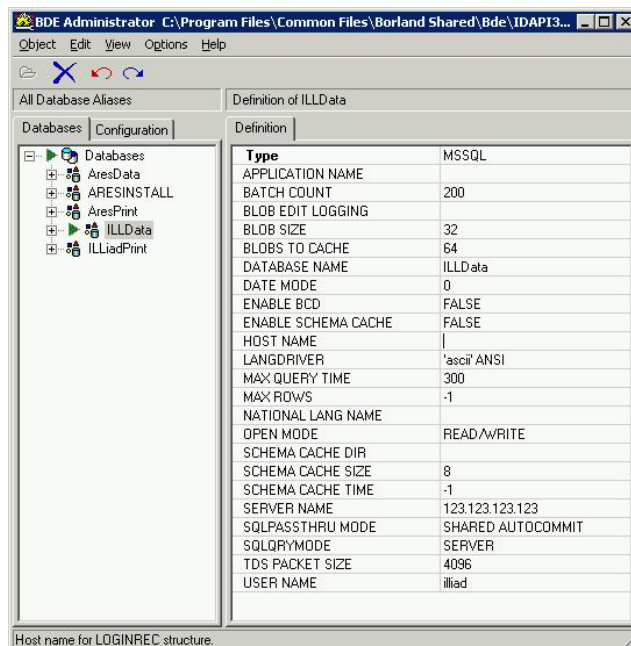
Well, ALL libraries should be saving paper with OCLC ILLiad. The one thing different about Denver Public is that they have publicized their efforts in *City InSight*, the newsletter for employees of the city and county of Denver. The Interlibrary Loan Department joined the PaperSmart campaign to reduce the use of paper at work, and they are getting great results. Instead of using 10,000 pieces of paper every month, they have cut back to 1,500 pieces of paper every two weeks, with more savings projected down the road. For the whole story, with a nice visual of the amount of paper being saved featuring two members of the Denver Public Library's ILL staff, go to <http://www.denvergov.org/Portals/14/documents/March%2007%20Insight.pdf> and check out page 4. Congratulations to the Denver Public Library for doing such a great job!

## Don't Panic: Basic ILLiad Troubleshooting Part 3 (Cont.)

When you see this error message, what it REALLY means is this: The Client machine from which you are attempting to launch the ILLiad client (where you are) is unable to see the ILLiad SQL server machine (the SQL server machine where the ILLData database is) using the specified SQL port (usually port 1433, unless this has been changed for your system) and the "illiad" SQL user account (the SQL account used by ILLiad to access the database).

If you understand what the system is attempting to do when this error is generated, you can reasonably assume that one of the following is likely the cause of the problem:

- There is some sort of network connectivity issue between the ILLiad Client machine and the ILLiad SQL Server machine on the SQL port. Please note: Even if the SQL port is blocked, other ports may be completely accessible, so make sure you specifically check connectivity on port 1433 (or whatever alternative SQL port you may be using). Port scanners can be your friend in cases like this.
- This kind of blockage could be related to firewall settings (don't forget to check the client machine's Windows firewall as well, if applicable), or some other network restrictions, or possibly some sort of network outage or downtime issue. If everything was working fine previously, if nothing has changed from an ILLiad settings point of view, and you suddenly see this error, you can usually bet on some sort of network/firewall problem. Bear in mind that this won't ALWAYS explain what might be going on, but it probably will be most of the time. Check with your local IT/Network/Firewall folks to see if anything might be going on in their realm before doing anything else.
- The instructions to the system as to where to look for the ILLData database are incorrect. These instructions are set in something called the BDE Administrator (Borland Database Engine - see image). This is not usually going to be the cause of any sudden random dysfunction in a formerly functional ILLiad system, at least not without some "help." This type of problem is usually encountered either during the initial ILLiad client setup process or as a result of someone making some rather ill-advised changes to the BDE settings (if happens). While I'm at it, unless we're talking about the ILLiad web server here, BDE configuration problems are going to be specific to the machine on which you are having the problem, so if only one client machine is affected, this is very possibly the issue. Note: If you ARE on a hosted ILLiad system and you don't know what the hosted server setup page is, it's probably best to leave the BDE alone and back away slowly. :)



The "Database Definition" for ILLData in the BDE (the right side of the image above) is what tells ILLiad where to look for the database. The important values here for our purposes today are the DATABASE NAME, SERVER NAME, and the USER NAME.

The DATABASE NAME is just that. It's the name of the database to which your ILLiad system is connected. This value for everyone NOT using a hosted ILLiad system will be ILLData. (Please note the capitalization. This is not an accident.) For hosted systems (regardless of who might be hosting them), this value varies a bit, but you should be able to find the appropriate database name for your system easily on your hosted server setup page.

The SERVER NAME is what identifies the ILLiad SQL server to the system. This value is going to be either the IP address or the name of your ILLiad SQL server. So something in the format of "123.123.123.123" is just as good as (and may actually sometimes be better than) something like "servername.institutionname.edu". To explain: Using the IP address eliminates the DNS server from the loop, so you may notice a slightly quicker response time using the IP address, particularly on slow networks. Because this is dependent upon the speed of your network though, your mileage may vary here.

The USER NAME is what tells the system what SQL user it's supposed to be using to run queries against the SQL database. This value should ALWAYS be "illiad" (lower case). No exceptions.

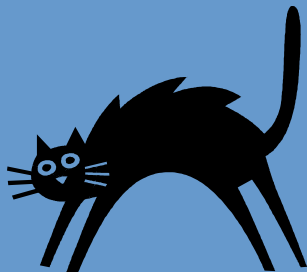
Ok folks, that appears to be all that we have time for today. Join us next time. Same ILLiad time, same ILLiad channel. Until then, always remember to have a day. K



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The OCLC ILLiad Newsletter is published quarterly by Atlas Systems, Inc. and edited by John R. Brunswick. Please send comments and suggestions to [jbrunswick@atlas-sys.com](mailto:jbrunswick@atlas-sys.com).

Atlas Systems was founded in July of 1995 primarily to work with computerized parking systems. While the company continues to do special projects in this area, after the launch of ILLiad in 1999, Atlas has been primarily focused on the development and support of the ILLiad Interlibrary Loan System. In October of 2000, OCLC licensed the ILLiad software from Atlas and Virginia Tech (where it was originally designed). Atlas continues to be the authorized service, support, and development arm of OCLC ILLiad.

Atlas Systems also does specialty database development projects, mainly related to workflow automation. Atlas's development background of utilizing pre-design operational flowcharting and analysis, as well as our common sense approach to programming produce easy to understand and maintain applications.

OCLC is a nonprofit membership organization serving 42,489 libraries in 86 countries and territories around the world. Membership in OCLC is a unique cooperative venture, giving your library global access to all our services and databases, including WorldCat. Together OCLC member libraries make up the world's largest consortium.

Founded in 1967 by university presidents to share library resources and reduce library costs, OCLC introduced an online shared cataloging system for libraries in 1971 that today is used by libraries around the world. The Interlibrary Loan service was introduced in 1979 and since then has been used for more than 122 million loans among 6,928 libraries around the world.

## T.I.P.S. - Training Information Per Stephanie

By Stephanie Spires, Training and Technical Support Specialist



### OCLC ILLiad Certified Operator Training

Atlas Systems, Inc. will once again provide an opportunity to complete all of the required courses to obtain OCLC ILLiad Certified Operator status over the upcoming coming fall and winter months. Designed by Atlas Systems, Inc., the OCLC ILLiad Certified Operator Program includes targeted courses designed to provide basic through advanced training in operation and configuration of the OCLC ILLiad software. Courses for this certification are completed primarily online. More information can be found at:

- Customizing OCLC ILLiad, September 19th onsite, Portland State University (online Winter 2008)
- OCLC ILLiad Custom Report Design, Winter 2008
- OCLC ILLiad Billing, Winter 2008
- OCLC ILLiad Electronic Delivery Using Odyssey, October 30th – November 1st online

<http://www.atlas-sys.com/training/handouts/certified.pdf>

Class schedules and registration details are available at:

<https://www.atlas-sys.com/training/>

We also offer Subscription Training, which is a great way to complete the certification program. For more information. Go to:

<https://www.atlas-sys.com/training/atlasevents.dll?do=22>

The training curriculum includes:

- Introduction to OCLC ILLiad, November 27th – 29th online.

Additional classes including new offerings are now available for registration as well, including the popular Customizing the OCLC ILLiad 7.2 Web Interface class.

Watch the ILLiad-L list and Atlas Community Portal for training schedule announcements. Please join us in a class soon and make the most of your investment in OCLC ILLiad. Registration is available online at [www.atlas-sys.com](http://www.atlas-sys.com). If you have ideas for future OCLC ILLiad Quick Course topics or have other training needs, please send them to [training@atlas-sys.com](mailto:training@atlas-sys.com).

Stephanie is Training Coordinator for Atlas Systems. If you would like to suggest a topic for T.I.P.S., please e-mail her at [sspires@atlas-sys.com](mailto:sspires@atlas-sys.com).