**ILLiad Ver. 8**

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Not yet out for public release.

Many changes. All to staff client. None to web interface, web reports, etc. Why? It’s been forever since they’d made changes to staff client and they wanted to do a thorough job of it all at once. Wanted to make it so staff could play with it without worrying about effects on users.

To use ILLiad 8, you have to be at 7.4 or higher to upgrade. Why? Database changes in that release (customization keys and tables.)

7.4.1.0 is a maintenance release coming out soon.

ILLiad 8 is being released in parallel. As long as you have 7.4, you can run version 8 on the same workstation – both at once. Why? Changes are big and someone will need time to migrate customizations and unique local practices. Not to mention, get used to it. You will be able to fall back and use the 7.4 client while you adjust.

You don’t have to make any changes to your ILLiad server to upgrade to ILLiad 8 (good news for OCLC hosted set-ups.)

You need local administrator privileges to be able to install ILLiad 8. This allows individuals to adopt it ahead of their colleagues without any disruptions.

Currently at “premium stage” – small number of people are using the client in order to shake out any issues. On 8.0.0.12. New releases almost every week at this stage. Will auto-update itself unless you don’t have local administrator privileges on your workstation.

ILLiad 8 puts 3 shortcuts on your desktop – the client (Labeled ILLiad **8** client), the Atlas SQL Alias Manager (you shouldn’t have to do anything here), and the Staff Manager (formerly known as User Manager – manages staff permissions.) User Manager = old = you install it and use it to create staff usernames so they can get into the client, web reports, customization manager, etc.) Staff Manager = new = no more confusing “user” language, same functionality but simpler permissions set-up.

(It looks kind of Microsoft Office 2007 up at the top menus. There’s a left pane where you select the user and a right pane where you can see and change the user info, module permissions, and transaction permissions.) New stuff – option to specify whether the staff member can customize layouts in the client.

IMPORTANT New Stuff – you need to go into staff manager and get permission to access things specific to the ILLiad 8 client before you can log into the ILLiad 8 client!!! That is, the transaction permissions. Any or all of the above: Borrowing Read, Doc Delivery Read, Lending Read, Borrowing Write, Doc Delivery Write, Lending Write. (Read = look but don’t touch. Write = can do things.)

Staff Manager lets you pick an initial password for new staff-users (isn’t automatically “ill”.)

ILLiad 8 uses same customization manager keys to look for templates, and it uses the same e-mail templates as 7.4. There is no way to use 8 and play around with the keys and templates without affecting 7.4! (But you will be ok.)

Documentation server is now on <http://atlas.sys.com/documentation> (a supercool wiki - it allows multiple versions of a document to coexist - on the new Prometheus server) - has both 7.4 and 8 preview documentation. Searchable Wiki. Overview of ILLiad 8.0, including screen caps. Everything Genie says in this presentation is also available in the documentation. (Now don’t I feel silly typing like a maniac! ☺) Log in to the wiki so that you can export to PDF/Word, see history of a post, watch a post (you’ll be e-mailed when the page is changed.)

Read the documentation before you install 8.0.

***Nothing changes on the server!!!***

31 libraries currently using ILLiad 8 at the moment. Many of them are IDS participants. All on a special listserv. (Find out who they are and make friends!)

Still unfinished – docline lending updating, docline borrowing processing. (Docline is very different.)

List of known issues is shrinking.

OCLC support is going to be thoroughly familiar with the client by the time of the general release.

What the client looks like:

Bottom left corner – your staff username.

Top left corner – big button for application menu (printer stuff, password stuff, login as)

Permissions affect what your client looks like when you log in. Different users can use same workstation – they don’t even have to close and reopen the client, just log in as a different user. No more ILLstud generic accounts!

Tabs – what you can look at - and Ribbons – what you can process (I think.)

Top right question mark = knowledge base (takes you to the documentation page.)

Top right i = feedback form. NOT for asking tech support questions! Just to let Atlas know what they need to work on in documentation and development process. (It automatically includes your username and permissions info, a screenshot of the page you were on, logs, and system info.)

What you can change:

The more you change, the more you have to keep track of!

Create Categories and add queues to them. For example, if you made a category called New Requests, it could hold Awaiting Request Processing and Awaiting Copyright Verification.

Right click form -> customize layout (only if you have permission to do this.) Can change sizes of panes, add reports, etc.

Customizing layouts makes changes to the user’s settings in the database. So the changes will take effect at any client on any workstation that user logs into.

You can use Staff Manager to give everybody the same customized layout (and optionally, take away their permission to change it.) For example, you can make categories of queues – “Student Work,” “Ignore” for all your student workers.

Can move straight through from copyright verification to request processing for an article request.

You can work on multiple requests at once. You can do different things at once. No bonks, no having to close one thing to get to another. One big form. Rarely does another form pop up on top of it. Tabs and ribbons mean you don’t have to close anything and you can switch between views. Can use tabs to navigate, or tab button at top, or **F12 takes you back to Main**. Shift F12 closes everything but Main (beware: it will lose your custom search unless you saved it.)

Don’t go nuts keeping multiple requests open because it prevents anyone else working on them. (Two people can’t process a request at once.)

**Closing a request is the same as Leave Request In Queue.**

OCLC processing – has its own tab.

There are ribbons within the request form (and those ribbons have tabs)! They are context-sensitive. (Nesting.) Context-sensitive ribbons show up when they are relevant and disappear when you are doing something else.

Context sensitive menus = work the same as Office 2007.

When you send a request, the Request Sent button is on the left now, because **the left side of the menu up top is for the logical “Next Step.”**

Printing is different! When you print the first time, it will ask you whether you want to look at/edit the document each time and whether you want to be asked which printer to use each time. If you tell it “don’t,” it will just spit things out automatically. You can also tell it to prompt you only for labels (for example.) This is a setting on the local machine, not attached to the staff member’s user account.

Things that will confuse you

How do I get into it? Install, then edit Staff Manager.

My screen looks different than somebody else’s screen! Customizable screens and restore to default layout.

Printing