



OCLC ILLiad Users Group

ALA Annual Meeting
New Orleans
June 25th, 2006

OCLC ILLiad Version 7.2 Update

- New Web Interface—including borrowing, lending, and web reports
- New Authentication Options
- Custom Searching in the ILLiad Client
- Email Manager
- Database Manager
- OCLC Web Service enhancements
- Other enhancements including security, updating, and ISO compatibility

Atlas Review

- Subscription Training
<https://www.atlas-sys.com/training/>
- Community Portal
<http://www.atlas-sys.com/community/>
- Upcoming ILLiad User Survey
- New ILLiad Documentation
<http://www.atlas-sys.com/documentation/newdesign/>

OCLC Hosting

- Timeline for moving OCLC ILLiad licensees to OCLC for server hosting

OCLC ILLiad Annual Meeting in Virginia Beach

- March 15th—16th, 2007 at the Hilton Oceanfront in Virginia Beach
- 10th Anniversary of ILLiad
- Training Classes from Atlas on March 14th

OCLC ILLiad Version 7.2 Update

Completely Redesigned Web Interface

The new ILLiad 7.2 web interface has been completely redesigned and includes new web pages in 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 request they have put into the system from the main menu, and the ability to allow users to undelete electronic delivery items that they accidentally deleted.

The new interface design also allows you to edit 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.

Web Authentication Redesign

The ILLiad web authentication modules have been completely redesigned as well. ILLiad now offers LDAP, WebAuth, 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. Pre-release documentation is available to show the new methods and how they will affect how you currently authenticate.

Web Preview Release

With the complete changes in the web side of ILLiad, we've built in a way to test new pages both before you upgrade as well as testing new designs after you've implemented 7.2. This new Web Preview feature allows you to simply make a separate directory on your web server for the 7.2 web pages which gives you a live test bed for changing and testing to make sure any changes you make will work in the new system.

The Web Preview Release of the DLL will be available soon from the Atlas Community Portal, along with instructions on how to try it out on your current ILLiad system. This will give you time to edit the standard web pages so that you can be ready for ILLiad 7.2 when it becomes available. During the Web Preview release, support for the new web pages and questions on editing them will only be available through the Atlas Community Portal.

The screenshot shows the ILLiad web interface. At the top, there is a search bar and a status indicator (Active/All). Below the search bar, a message says "Choose an option from the choices below." The main content area is divided into a left sidebar menu and a central table. The sidebar menu includes sections for "Logoff jglover", "Main Menu", "New Request" (with sub-items like Photocopy, Book, Book Chapter, Conference Paper, Patent, Report, Thesis, Standards Document, Other), "View" (with sub-items like Outstanding Requests, Electronically Received Articles, Checked Out Items, Cancelled Requests, History Requests, All Requests, Notifications), "Tools" (with sub-items like Change User Information, Change Accounts, Change Password), and "About ILLiad". The central table is titled "Outstanding Requests" and has columns for Transaction, Type, Title, Author, and Status. It contains two rows of data. To the right of the table, there are two "Test System Alert" boxes, one for "System Alert 2" and one for "System Alert 1".

Transaction	Type	Title	Author	Status
1055	Article	This is a test title: Article Title		Awaiting Copyright Clearance
1050	Book	The Firm	John Grisham	Awaiting Request Processing

The screenshot shows the ILLiad web interface for a "Photocopy Request". The form is titled "Photocopy Request" and includes a search bar and a status indicator (Active/All). Below the search bar, there is a message: "Enter information below and press the Submit Information button to send." The form is divided into a left sidebar menu and a central form area. The sidebar menu is identical to the one in the previous screenshot. The central form area is titled "Describe the item you want" and contains several input fields with labels: "Title (Journal, Conference Proceedings, Anthology)", "Volume", "Issue Number or Designation", "Month", "Year", "Inclusive Pages", "ISSN/ISBN (International Standard Serial/Book Number)", "Call Number", "OCLC or Decline UI Number", "Article Author", and "Article Title". A note says "Please do not abbreviate unless your citation is abbreviated" and another says "If given will speed request processing". A red asterisk indicates required fields.

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.

PDF Processing for Odyssey

With ILLiad 7.2, you will be able to send PDF files through Odyssey without first converting them to TIFF files. Odyssey will support PDF and TIFF natively.

Email Manager

The new ILLiad Email Manager will be available on your ILLiad server. When using the Email Manager service, each individual client won't send emails to your email server. All emails are stored on the server in the EMailCopies table and are sent out by the service every few minutes. This makes securing your SMTP server easier because you can restrict access to a single IP since only the server sends emails. This also allows the error handling for emails to be removed from the processing steps in ILLiad.

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.

Security Enhancements

The logon.txt files are being replaced with an encrypted version of the file. This will allow easier changing of the ILLiad database password. We recommend everyone change the ILLiad database password and use the new encrypted version when 7.2 is available.

OCLC Web Service Updates

The OCLC Web Service is being updated to version 1.2 with the release of 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 will be 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 will be added, and the uploading and downloading processes will be made more efficient.

Lending Shipped updating will be changed so that ILLiad will update to Shipped during the lending processing in 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.

Support for Remote Circ will be offered in ILLiad with the release of 7.2 This offers a way to enable a vendor-neutral resource sharing brokering service using NCIP protocols between ILLiad and disparate ILS/ILL systems to facilitate patron initiated, unmediated resource sharing between and beyond library consortia.

Additional Updates

Updating will be improved in this release of ILLiad. You will be able to set up your clients to automatically download a new client file when it is available - either from the Atlas server or your local server. A single release update will now be available.

ISO ILL compatibility will be added for VDX in this release.

ILLiad 7.2 Release Date

We are currently targeting the release of ILLiad 7.2 this fall. The Web Preview Release will be available soon for sites wanting to get a head-start on customizing their web pages using the new system.

Atlas Items

Subscription Training

Subscription Training is now available for all Atlas training classes. You can create a user account and sign up for classes as well as review recorded sessions at any time with a subscription training account. To see a current list of upcoming classes, visit:

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

Atlas Community Portal

The Atlas Community Portal will be used for support for the 7.2 Web Preview release. A specific category called "Web Preview Release" is located under the ILLiad group. You can post questions there about the release and Atlas staff will endeavor to answer them.

Also, we will be posting links from the Community Portal to an ILLiad User survey with questions about how you use ILLiad as well as which systems you are interacting with currently. Please take the time to fill out the survey - some lucky survey participants will receive prizes!

New ILLiad Documentation

The ILLiad Documentation suite has undergone a redesign. With these changes, all help will now be available in the following formats:

- Adobe Acrobat PDF
- Microsoft Word
- Web-based via Atlas – google-able via the Atlas Systems website
- HTML Help (.chm) single file (Windows XP compatible)

A sample suite of 7.1 manuals is now available in all of these formats on the website at:

<http://www.atlas-sys.com/documentation/newdesign/>

Hosted Server Move from Atlas to OCLC

This summer, we will be migrating the hosted OCLC ILLiad servers to a new facility, hosted by OCLC directly. This move will provide you with new features and securities while continuing all the reliable hosted services you currently have.

With your OCLC ILLiad server in the OCLC facility itself, you will have 24/7 server support from OCLC's team of server administrators. Additionally, OCLC Customer Support will have easier access to your server to provide faster and more streamlined support. Your OCLC ILLiad server will also be sharing the same server space with OCLC WorldCat, giving your server the fastest connection possible to OCLC WorldCat Resource Sharing. The same backup systems and recovery plans used for maintaining WorldCat will all cover your ILLiad server.

We will begin this migration in July and continue moving servers until mid-August. Prior to moving to the OCLC facility you should be on version 7.1.8.0 of the ILLiad client. Because of the number of installations being migrated, we are moving the servers in batches over the course of six weeks. Each server migration, though, will only have downtime for one weekend during their move.

2007 OCLC ILLiad Annual Meeting

The 2007 OCLC ILLiad Annual meeting will be held in Virginia Beach at the Hilton Hotel Oceanfront Convention Center on March 15th and 16th, 2007. By moving to Virginia Beach, we're able to use a larger space to allow more people to participate in the conference.

Registration information will be provided soon. Price for registration will be \$100 per person. You won't be limited to the number of people who want to attend from a single ILLiad site.

Sites who have signed up for the new Atlas Subscription Training will receive one free registration for the conference. There will also be training classes on Wednesday, March 14th taught by Atlas staff.