The Web Platform

So...what is a web platform and why do we need one?

- An instruction manual for what a program can do
- **API:** Agreed language where networks can talk to each other
- **Web service:** Interface for other computers to talk to that service, instead of needing a person
- Can use these list of commands to connect with other services and make ILLiad more flexible
The Web Platform

• ILLiad can now talk to the Policies Directory to look up more information

• Different colors can be used for Days to Respond (1, 2, 4, 8, 12, 16, and 20), and can be customized from the ILLiad Options form.
Time Saving Tip

The grid of Holdings symbols now shows you the Days to Respond

Copies on the top,
Loans on the bottom

Now you don’t have to hover and wait to see this information!
Electronic Delivery Utility

![Electronic Delivery Utility UI](image)

- **Process Type**: Lending
- **Transactions Log**:

<table>
<thead>
<tr>
<th>Process</th>
<th>Status</th>
<th>Transaction Number</th>
<th>ILL Number</th>
<th>Title</th>
<th>System ID</th>
<th>Pages</th>
<th>Borrower Symb</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ready to send</td>
<td>10</td>
<td>107899767</td>
<td></td>
<td>OCLC</td>
<td>0</td>
<td>TPINAB</td>
</tr>
<tr>
<td></td>
<td>Ready to send</td>
<td>11</td>
<td>107899807</td>
<td></td>
<td>OCLC</td>
<td>0</td>
<td>TPINAB</td>
</tr>
<tr>
<td></td>
<td>Ready to send</td>
<td>7</td>
<td>107886200</td>
<td></td>
<td>OCLC</td>
<td>0</td>
<td>TPINAB</td>
</tr>
<tr>
<td></td>
<td>Ready to send</td>
<td>8</td>
<td>107886845</td>
<td></td>
<td>OCLC</td>
<td>0</td>
<td>TPINAB</td>
</tr>
<tr>
<td></td>
<td>Ready to send</td>
<td>9</td>
<td>1078998651</td>
<td></td>
<td>OCLC</td>
<td>0</td>
<td>TPINAB</td>
</tr>
</tbody>
</table>

- **Category**:
  - Standard Charges:
  - Base Fee: 10.00
  - Per Page Fee: 0.00
  - Quantity: 0
  - Total: 10.00

- **Billing Notes**:
  - Total: 10.00

- **Found 5 transactions**
Electronic Delivery Utility

Changed name from “Odyssey Helper” to “Electronic Delivery Utility”

Can now send files using both Odyssey and Article Exchange
Electronic Delivery Utility

It will find:

- Lending requests at the status of In Stacks Searching and Doc Del Requests at the status of In DD Stacks Searching

- Transactions that have a PDF or TIFF file with a name matching the transaction number in the location specified in the ILLiad Customization Manager
Electronic Delivery Utility

Auto Mode checks for requests every minute and tries to send them automatically.

If successful, the request will move to Request Finished. If it fails, it will be moved back to In Stacks Searching/In DD Stacks Searching.
Time Saving Tip

Point the path keys:

- ElectronicDeliveryUtilityImagesPathDocDel
- ElectronicDeliveryUtilityImagesPathLending

to a share drive that both your scanner and ILLiad clients can access.

With AutoMode, the items will deliver straight from this folder, without ever having to see the client.
Time Saving Tip

Turn Article Exchange sending on using the SendArticleExchangeOnOdysseyFailure key.

If a request is sent via Odyssey and it fails, the Electronic Delivery Utility will then use Article Exchange to send the article.
Web Pages

Web aliases can be easily created, edited, and deleted in the ILLiad Customization Manager from the DisplayStatuses table.
### DisplayStatuses

<table>
<thead>
<tr>
<th>ID</th>
<th>NVTGC</th>
<th>ProcessType</th>
<th>TransactionStatus</th>
<th>WebDisplayStatus</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ILL</td>
<td>Borrowing</td>
<td>Request Sent</td>
<td>Waiting for Lender</td>
</tr>
<tr>
<td>2</td>
<td>ILL</td>
<td>Borrowing</td>
<td>Awaiting OCLC Sending</td>
<td>Waiting for Lender</td>
</tr>
<tr>
<td>3</td>
<td>ILL</td>
<td>Borrowing</td>
<td>Request Held Until (. +)</td>
<td>Held til $1</td>
</tr>
<tr>
<td>4</td>
<td>ILL</td>
<td>Borrowing</td>
<td>(Awaiting?)(. +) Processing</td>
<td>$1Some Super $2 Magic</td>
</tr>
<tr>
<td>5</td>
<td>ILL</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>This status won't be shown since #4 would be picked up</td>
</tr>
<tr>
<td>6</td>
<td>ILL</td>
<td>Lending</td>
<td>Awaiting LOCL Request Processing</td>
<td>Awaiting High Priority Lending Processing</td>
</tr>
</tbody>
</table>

### Edit Row

<table>
<thead>
<tr>
<th>ID</th>
<th>NVTGC</th>
<th>ProcessType</th>
<th>TransactionStatus</th>
<th>WebDisplayStatus</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ILL</td>
<td>Lending</td>
<td>Awaiting Recall Processing</td>
<td>Please send material back</td>
</tr>
</tbody>
</table>
Web Pages

You can set more complex password requirements for your patrons accounts.

This is for ILLiad authentication users and is regulated in the Customization Manager’s WebValidation table.

With the ILLiad default password requirement, passwords must contain:

- At least 8 characters
- At least 1 lowercase letter
- At least 1 uppercase letter
- At least 1 number
Web Pages

You can see all possible web Table customization options for the ILLiad web pages in the documentation

https://prometheus.atlas-sys.com/display/illiad/TABLE+Tags

<#TABLE name="ViewOutstandingRequests" headerText="Outstanding Requests" noDataAction="ShowMessageRow" noDataMessage="No Requests" column="TransactionNumber:Transaction" column="DocumentType:Type" column="Title" column="Author" column="TransactionStatus:Status" orderBy="RequestType,DocumentType, TransactionNumber DESC">
Time Saving Tip

Tired of “What does ‘Request Sent’ mean?” phone calls?
Users

You can now block patrons specifically for overdues

• You can choose whether or not to do this with the BorrowingBlockOnThirdOverdue key
• The block will happen automatically
• The block will be lifted once the overdue items are returned
Users

We’ve added new fields in the UserValidation table:

• UserInfo 1-5
• WebAuthType

This has allowed...
Users

...the ability to load patron information for RemoteAuth and LDAP users!
Users

Two ways to use:

1. **Auth** indicates that the User record will be used to authenticate a user. If a user successfully authenticates and their User record does not already exist, a User record will be created with information from the UserValidation data.

1. **Load** is only applicable when using a WebAuthType of LDAP or when Remote AuthSupport is enabled. If so, the default WebAuthType will be used and the UserValidation data is only used to populate a newly created User record after a user successfully authenticates.
Time Saving Tip

• Set up a recurring job that uploads patron information to the server.

• New, qualified users will be logged directly into ILLiad, without having to register

No more junky patron data!
Email Notifications

• The To, From, CC, BCC, and Subject fields now allow tags to be included.

• Templates can now include a Staff Username, First Name, Last Name, and Description. These fields will be populated based on the staff user who is sending the email.

• The Edit Email form will now display the From and BCC addresses. The From field is read-only.
Email Notifications

• In the EmailCopies table, the EmailTo, EmailFrom, EmailCC, and EmailBCC fields have been updated to nvarchar(max)

• The Subject field has increased to nvarchar(255). Email subjects larger than 255 characters will be truncated
Email Notifications

Cancellation email templates have been split based on request type. The following templates now exist:

- Borrowing Cancellation Article
- Borrowing Cancellation Loan
- Doc Del Cancellation Article
- Doc Del Cancellation Loan
- Lending Cancellation Article
- Lending Cancellation Loan
Time Saving Tip

Let the updater convert your templates for you!

• Make sure to use the file name from the Email Routing entry INCLUDING the .TXT. This will make the ILLiad updater recognized the template and that it will update your field tags.
  – For example, if you have an Email Routing template named Recall.txt, when you create the new template in the ILLiad Customization Manager you will need to name it Recall.txt.

• After you update, if you want to you can remove the .txt from the Template name and from the Email Routing entry. The .txt in the name is only needed when updating to make sure the tags are updated.
Text Notifications

• Users can now choose if they want to receive notifications specifically for electronic delivery items. These notifications are separate from loan notifications.

• All users will be automatically subscribed to electronic delivery notifications at first, but this can now be changed.

• A checkbox has been added to the User form to enable or disable notifications for electronic delivery.
Text Notifications

• Users' Notification Method will be changed from E-mail to Electronic.
• Staff and/or patrons can specify which notifications to send as Email and which to send as SMS.
• The Mobile Phone field has been added to the User record and will be used for SMS notifications.
• Text message templates can be created and edited in the ILLiad Customization Manager.
Text Notifications

In order for SMS/Text notifications to send successfully:

• Use the Atlas Twilio server addon (or create your own)
• You must have a subscription with Twilio [https://www.twilio.com/](https://www.twilio.com/)
• Set up SMS-specific templates
• Add phone numbers to the Mobile Number field in patron User records
• The user must have the desired notifications checked in the SMS Notifications section on their User record
Text Notifications

• A checkbox can also be added to your web pages for patrons

• The include_notification_preferences.html allows this to happen
Time Saving Tip

Make sure all your users have Electronic Delivery set to “Yes” before the 8.6 update.

This will ensure that their Notification Method is set to Electronic and that the right boxes are checked.
Database

• The History tab is now available for custom searching

• The MatchString field in the Routing table has been updated in the database to allow nvarchar(max) values, expanding the previous 250 character limit.
The DownloadInProcess routine will now be part of the 12 hour sync done by the ILLiad Connection Manager.

If you manually added DownloadInProcessOnNextRun customization key, it will be removed.

No more worries about items stuck in WorldShare “In Process”!
Time Saving Tip

No limits! Make those super crazy routing rules!

Combine multiple routing rules into single strings!
Print Templates

- Shipping Addresses table
- Can replace, if necessary, with LA_Address
Print Templates

Only the merged template now appears in MS Word
Time Saving Tip

No pop-ups when printing!

<table>
<thead>
<tr>
<th>Template</th>
<th>Printer</th>
<th>Filter</th>
<th>Sort Columns</th>
<th>Edit</th>
<th>Prompt</th>
</tr>
</thead>
<tbody>
<tr>
<td>BorrowingLoanLabels.doc</td>
<td>Canon R-ADV C5250/5255 UFR II</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BorrowingLoanSlips.doc</td>
<td>Canon R-ADV C5250/5255 UFR II</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BorrowingReturnSlips.doc</td>
<td>Canon R-ADV C5250/5255 UFR II</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LendingArticleSlips.doc</td>
<td>Canon R-ADV C5250/5255 UFR II</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LendingLoanLabels.doc</td>
<td>Snagit 11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LendingLoanSlips.doc</td>
<td>Snagit 11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BorrowingArticle_labels.doc</td>
<td>Canon R-ADV C5250/5255 UFR II</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LendingArticleSlips.doc</td>
<td>Canon R-ADV C5250/5255 UFR II</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>BorrowingArticle_slips.doc</td>
<td>Canon R-ADV C5250/5255 UFR II</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PrintRequest.doc</td>
<td>Snagit 11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Import into Resubmission

Clicking Import into Resubmission will now automatically delete the OCLC request for Unfilled requests.
Time Saving Tip

Make an email routing rule that Cancels first, but asks users if they still need it, instead of automatically resubmitting!

Example: “We have attempted to fill your request, but it was denied by several potential lending institutions. If this item is still needed, please respond to this email, letting us know to continue attempting to find your materials.”
Electronic Delivery

The Resend Request button that is enabled when Odyssey sending fails has moved to the new Odyssey processing ribbon in Lending.

There is now also the ability to enable and disable Odyssey for a specific request.
Electronic Delivery

All sites can now receive PDFs!

The requirement for sites to first communicate with another site to determine if the other site can receive PDFs is no longer required.
Time Saving Tip

You can deliver all articles at once!

On the Electronic Delivery form, click the Review All checkbox then click Deliver

NOTE: The BillingActive key must be set to No.
Thank You!!!!

Stop us for questions or comments!

Email us at:
chafen@atlas-sys.com
kkeegan@atlas-sys.com