

OCLC ILLiad Version 7.3 Overview

This document is a synopsis of all the changes in Version 7.3.0.0 of the ILLiad system (released April 1, 2008). Nearly every component has some change to it, some more so than others. The first section of the document describes the noticeable changes in each component and the next section has a detailed list of every change (most of them transparent to the user interface).

Microsoft .NET 2.0

As part of the move to ILLiad 8, some components of ILLiad 7.3 utilize Microsoft .NET 2.0. They include the web reports, System Manager service, Web Circ module, Customization Manager, and Rapid Manager. In order for these applications to function, you must have Microsoft .NET 2.0 installed on your ILLiad server as well as any machines that will be accessing the new Customization Manager. The .NET 2.0 Framework is a free download from Microsoft and your IT staff can help you verify if you already have it installed.

ILLiad Server Files Needed

You will need both Microsoft .NET 2.0 as well as the AJAX 1.0 extensions for .NET installed on your server for ILLiad 7.3 to function:

Microsoft .NET Framework Version 2.0 Redistributable Package

<http://www.microsoft.com/downloads/details.aspx?FamilyID=0856EACB-4362-4B0D-8EDD-AAB15C5E04F5&displaylang=en>

ASP.NET AJAX 1.0

<http://go.microsoft.com/fwlink/?LinkID=77296>

ILLiad Client Files Needed

You will need the Microsoft .NET 2.0 framework installed on any machine where you want to run the new Customization Manager. You will also need this for the ILLiad 8 Client when it is released, so upgrading now is recommended.

Other Versions of .NET

If you have a different version of .NET installed, you will need to also install the versions listed here. Microsoft has designed the .NET package to allow different versions to be installed simultaneously.

All New ILLiad Web Reports

All new ILLiad web reports are included with ILLiad 7.3. These reports have been entirely rewritten, allowing for many new features including all new graphics, the ability to dynamically interact with the resulting data and exporting the results to Microsoft Excel.

Access Restrictions

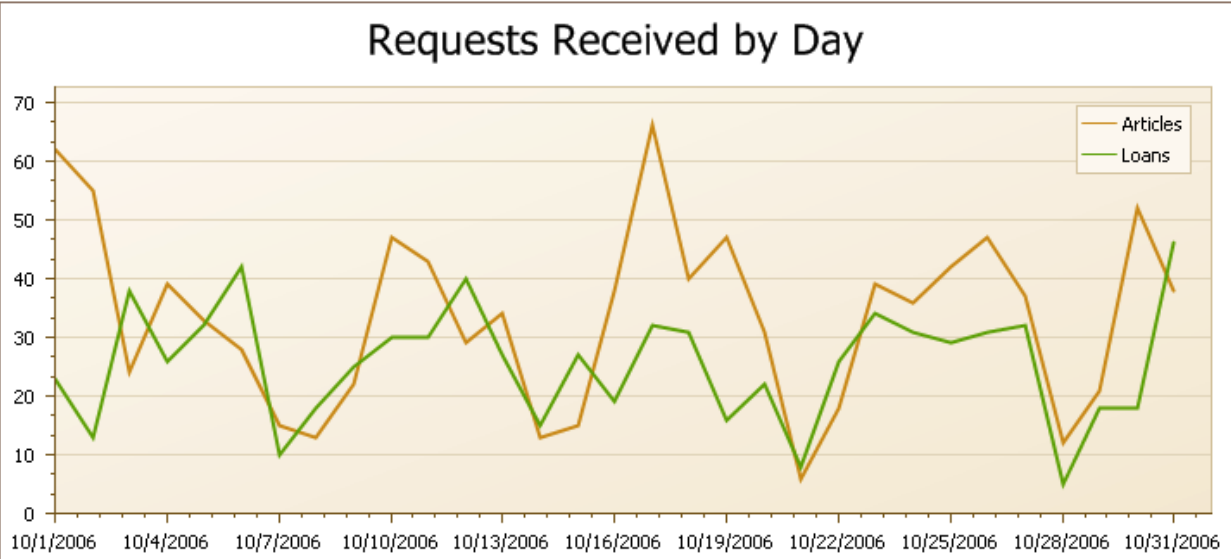
You must log into the ILLiad web reports using your ILLiad staff username and password now to gain access. Staff access must also be enabled through the User Manager.

All New Graphics

All of the graphics are standard PNG images once they are displayed on the page, allowing you to easily save or print the graphs to include in other presentations. These graphs also allow you in many instances to switch the type of graph displayed or the way the information is shown without regenerating the report. Pie charts can be turned into doughnut charts and points can be exploded to better show differences; line charts can be switched from 2-D to 3-D on the fly.

Line Graph Options ([Change to 3D Line Graph](#))

Show Labels
 Label Angle:
 Marker Kind:
 Marker Size:



Interactive

Data grids within the reports are able to be resorted and grouped on the fly without regenerating the report. You can also view subtotals within groupings, allow calculations to be reviewed within the report.

Reports with the ability to allow grouping will have the group header as in the following example:

Finished Requests with Copyright Fees								
Drag a column header here to group by that column								
Journal Name	Transaction Number	ISSN Number	CCC Number	CCC Order	Year	Pages	Copies	Total Fees
Anticancer Research	491756	02507005		Yes	2005	8	1	\$8.20
Biofouling	490917	08927014		Yes	2006	22	1	\$25.00
Biofouling	490919	08927014		Yes	2006	13	1	\$25.00

Grouping this report on the Journal Name is as simple as dragging that field up into the header bar. Doing this allows you to see each Journal Name as a group along with the number of requests with that Journal Name and the total fees associated with it:

Finished Requests with Copyright Fees									
Journal Name <input type="text"/>									
Journal Name	Transaction Number	ISSN Number	CCC Number	CCC Order	Year	Pages	Copies	Total Fees	
Journal Name: Anticancer Research (Total Fees: \$8.20, Count: 1)									
Journal Name: Biofouling (Total Fees: \$100.00, Count: 4)									

Clicking on any column header will also allow you to sort the report results by that value.

Reports that are long will show automatic paging controls. You can page through the results or choose All and see the entire report on a single page.

10/10/2006	47	30	77
Total	1,042	794	1,836
Page 1 of 4 (31 items) < [1] 2 3 4 > All			

Export to Microsoft Excel

Each report has the option to export all results with a single click. This includes the parameters, graphs, and results after you've grouped or resorted to a Microsoft Excel spreadsheet.

Export Options

Exporting to Microsoft Excel creates a multi-sheet workbook for this report with parameters, graphs (if applicable) and grids of all data. Any grouping or sorting you do before clicking export will change the display of the data in Excel.

New Report: Borrowing - Requests Sent by Hour

This new borrowing report allows you to select a single day, then shows requests sent out on various systems broken down by hour.

New Report: Borrowing - WorldCat Information

As requests are sent out on OCLC using ILLiad, ILLiad stores the following numbers if available for the selected OCLC record: LC, NAL, NLM, DEWEY, GOVDOC. This new borrowing report allows you to select a date range as well as choose a subset of those listed call number/classification numbers and show the requests that match the selection.

New Report: Lending - Most Loaned Monographs

This report shows monographs that are loaned over X number of times during a specified time period.

New Report: Lending - Most Unfilled Journals

This report shows journals that went unfilled over X number of times during a specified time period.

New Report: Lending - Requests Submitted via Lending Web Pages

This report displays requests that were submitted via the Lending Web Pages and to which lending string they were sent.

New Report: Doc Del - Fill Rate Statistics

This new document delivery report allows you to choose display items that were submitted, cancelled, still in process, or filled during a specified time period along with totals. You can also limit this by the user's status.

New Report: Doc Del - Reasons for Cancellation

This document delivery report shows requests for a specified time period that were cancelled and the reason, percentage and number cancelled.

New Report: Doc Del - Requests Finished and Cancelled

This report displays requests as either finished or cancelled during a specified time period and the percentage. It also shows the reasons that requests were cancelled.

New Report: Admin - Staff Activity by Username

This report shows different ILLiad statuses and the number of requests handled per status by each staff username during a specified time period.

Scheduled Emails

Borrowing notification emails (the emails under Contact Customers) can now be scheduled in ILLiad 7.3. You can schedule notification emails one of two ways: you can set a specific time of day (i.e. 5pm) for the email to be delivered, or you can delay sending for a certain amount of time from when it was "sent" in ILLiad (i.e. 2 hours delay on all notification emails). While the staff click the button to "send" notifications, they may be delayed and not be sent for several hours. From the tracking and client interface perspective, though, the notification has been sent. This flexible feature also allows you to have different rules for different types of customers or requests based on a match string similar to the one used in the Routing table.

A new table has been added called EmailNotificationSchedule which is structured like the Routing table.

- **ScheduleID:** This is the number of the notification rule. Only one rule will be applied to each email starting at 1 and going up. These numbers do not need to be consecutive.
- **ScheduleActive:** This is **Yes** or **No** to set whether the rule is active or not.
- **ScheduleName:** A user-assigned name for the notification rule.
- **Description:** A user-assigned description for the notification rule.
- **ProcessType:** This is either **Borrowing** or **Doc Del**.
- **MatchString:** This string following the same matchstring rules as the Routing table. The Transactions table (t) and the Users table (u) are both available.
- **TimeValue:** This value is either a time in 24 hour format (i.e. 5pm is 17:00) or a number of minutes to wait before sending the email (i.e. 120 for 2 hours). If the value is a time in 24 hour format and you are sending the email in ILLiad after that time, it will be sent the next day at the specified time.

An example of scheduling a notification email to send at 5:00pm for faculty members who are at the MED delivery location only for (non-electronically delivered) articles in ILLiad would be:

Field Name	Value
ScheduleID	1
ScheduleActive	Yes
ScheduleName	Medical5
Description	Send article notification emails for medical library faculty at 5pm.
ProcessType	Borrowing
MatchString	u.NVTGC = 'MED' and u.Status = 'Faculty' and t.RequestType = 'Article'
TimeValue	17:00

An example of scheduling a notification email to send 2 hours after processing for items at the LAW delivery location would be:

Field Name	Value
ScheduleID	2
ScheduleActive	Yes
ScheduleName	LAW2
Description	Send notification emails for LAW location 2 hours after processing.
ProcessType	Borrowing

MatchString	u.NVTGC = 'LAW'
TimeValue	120

An example of scheduling all borrowing notification emails to send 30 minutes after processing for all items would be:

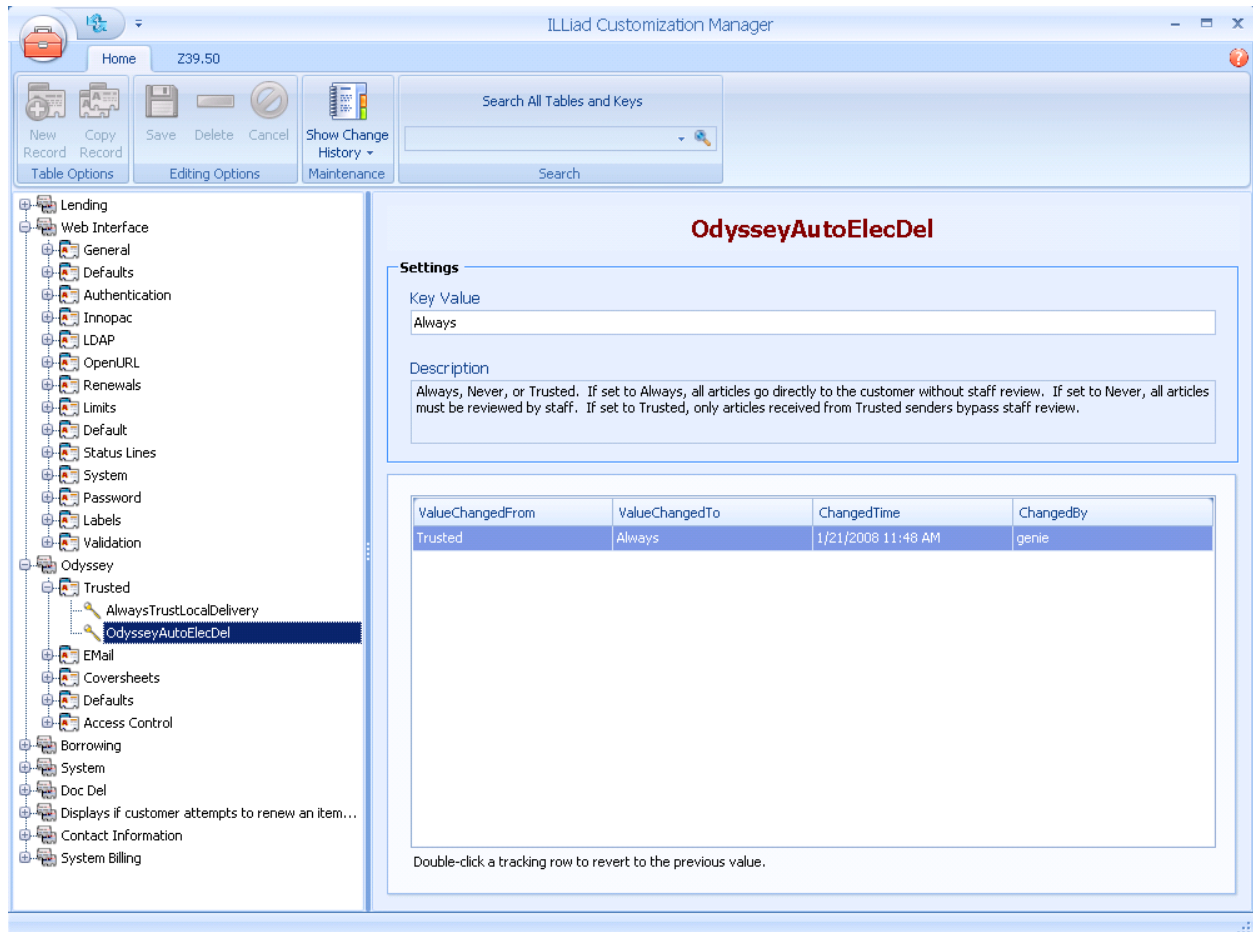
Field Name	Value
ScheduleID	3
ScheduleActive	Yes
ScheduleName	30MinDelay
Description	Delay all notification emails by 30 minutes.
ProcessType	Borrowing
MatchString	
TimeValue	30

System Manager

The new System Manager replaces the ILLiad Cleanup program and the Email Manager with a single service. Note that when you update to version 7.3, there is no longer an option to have emails originate from the ILLiad clients themselves. The previous customization key for EMailManagerSupport is ignored as all components default to using the System Manager for sending emails. Before upgrading to 7.3, be sure that your current system can send emails with the EMailManagerSupport customization key set to Yes and the EMail Manager service running on your server.

Customization Manager

The Customization Manager has an entirely new ribbon interface in ILLiad 7.3, allowing for easier searching and updating of keys and administrative information. Also, any key changes made are tracked within the Customization Manager for easy review, allowing a view of recent configuration changes to the system and the ability to revert to prior settings with a click of the mouse. The list of recent changes can also be exported to an Excel file or HTML to help with troubleshooting an issue.



Client Side Installer

While the server updater will install the Customization Manager and necessary system updates on the server to run it there, if you want to run the Customization Manager on a non-server machine, you will need to run the Customization Manager installer. This will update your client machine with the executable and all the other necessary system files to run the new Customization Manager. This file is named CustomizationManager73Installer.exe and is located on the server in the c:\ILLiad\setup folder.

User Manager

The User Manager has been updated with new fields in the Staff table called StaffFirstName, StaffLastName, and StaffDescription for identifying usernames in ILLiad. The ability to export the list of users into an Excel spreadsheet or HTML has also been added.

This is also where you can customize which staff users have access to the Web Reports, Web Circulation and ILLiad client. All three of those access options are enabled by default during the upgrade for any current staff users in the Staff table.

Web Circ

The new ILLiad Web Circ module allows sites that use a remote desk for circulating ILL materials to have access to ILLiad circulation functions without having the ILLiad Client installed on circulation workstations. With the Web Circ module, users can log into a restricted web view of ILLiad and check items out, check items in, renew, and mark an item as In Transit. Permissions can be restricted so the staff using the Web Circ module only have access to that module and cannot use the ILLiad Client, Web Reports or any ILLiad administrative tools.

ILLiad Web Circulation

Main	General Information	
Home Logoff genie	Transaction 10 Customer Notified via E-Mail Loan / Book ISSN: Due: 1/27/2007 12:00:00 AM Renewals Allowed: No Library Use Only: No Allow Photocopies: Yes Pieces: 1	Disavowed Genie Powell (genie) Library ID: 123121234 Faculty
Transaction Tasks		
Check Out Mark In Transit Check In Renew		
	Bibliographic Information	
	The world's cats : proceedings of the third International Symposium on the World's Cats, April 26-28, 1974 / International Symposium on the World's Cats (3rd : 1974 : Seattle) Dept. of Zoology University o Seattle Volume Issue Pages:	

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Main Menu

The "Home" link will bring a staff member back to the main page that allows quick tasks (basic circ tasks from the home menu without having to look up the request first) and searching of requests or users.

If on a Shared Server system, a link will display allowing the staff member to change the current site if the staff user has access to all sites. The link will also display the current site.

Shared Server Sites

All sites will use the same Web Circulation URL. Upon login, the staff user will only be allowed to process and search requests and users for the current site. If a staff member has access to all sites (their NVTGC in the Staff table is set to ALL), he or she has the ability to change the current site from the Main menu.

Quick Tasks

Quick Tasks allow the staff member to quickly process an operation if the transaction number is known. Enter the transaction number in the appropriate textbox and click the respective button. A status message will display indicating if the operation was successful or if the system encountered an error. You can also use a barcode scanner to enter the Transaction Number, if available.

Occasionally a quick task transaction will redirect to the View Request page. This will happen when attempting to check in or mark an item in transit that has multiple pieces. If a user is blocked from using ILLiad, a status message will be displayed to alert the staff member.

Search

The staff member can search for both requests and users on the home page. Request searching will attempt to find requests that match based on Transaction Number, ISBN, ISSN, journal, title or author. User searching will attempt to find users that match based on username, first name, last name, department, status or SSN.

Search results will display in the grid below. To see more detailed information on a row in the grid, click on the link or double click on the row.

Check out

Checking an Item out will change the transaction status of the request to “Checked Out to Customer.” Check outs can only be processed if the current transaction status starts with “Customer Notified via ...”. All Web Circulation Check Out activity may be disabled by setting `WebCircEnableCheckOut` to *No* in the Customization Manager.

Check In

Checking an item in will change the transaction status of the request to “Awaiting Return Label Printing”. If the item was at a previous status of “In Transit” or “Checked Out to Customer”, a tracking entry of “Item Checked In” is added. If the item was never picked up by the customer, a tracking entry of “Item Not Picked Up” is added. Performing a check in will update the OCLC request to Returned. All Web Circulation Check In activity may be disabled by setting `WebCircEnableCheckIn` to *No* in the Customization Manager.

Mark In Transit

Marking an item in transit will change the transaction status of the request to “In Transit.” The Mark In Transit operation is only allowed if the transaction status is currently at “Checked Out to Customer”, “Renewal Requested” or “Renewed by Customer to xx/xx/xxxx”. Marking an Item in transit will not update OCLC. All Web Circulation In Transit activity may be disabled by setting `WebCircEnableMarkInTransit` to *No* in the Customization Manager.

Renew

The Renew process in ILLiad Web Circulation is very similar to the renewals that users can request themselves in the borrowing DLL. If `AutomaticRenewals` is set to *No* in the Customization Manager, the transaction status will be changed to “Renewal Requested”. If `AutomaticRenewals` is set to *Yes*, if renewals are allowed on the item and the renewal period is valid (defined by the `RenewalWindowDays` and `RenewalBeforeWindowDays`), the transaction status will change to “Renewed by Customer to xx/xx/xxxx”. All Web Circulation Renewal activity may be disabled by setting `WebCircEnableRenewal` to *No* in the Customization Manager.

View Request Page

The View Request page is displayed after choosing a transaction in the Search requests grid or in the event a warning is displayed for a specific transaction. The View Request page shows both transaction and user details. The quick tasks are removed when on this page and replaced with links for circulation operations on the current transaction that is being displayed.

View User Page

The View User page is accessible by choosing a user on the Search Users grid. Details about the user and all of their active requests will display. The requests that show are only those that can be checked out/in or renewed (i.e. not items at Request Sent or Request Finished). The grid displaying active requests works the same as the other grids used throughout ILLiad Web Circulation. Click the link on the Transaction Number field or double click a row to be redirected to the details of an individual transaction.

Change Site

After clicking “Change Site” on the main menu, a list of all Sites will be displayed. Choose the site to be used for searching and processing circulation options on. ILLiad Web Circulation will then redirect to the Home page. The Change Site option only appears if the staff user has an NVTGC of ALL, otherwise only the staff user's site is available.

Configuration of Web Circ

There are 5 new keys for the Web Circ module:

Key Name	Description	Default Value
WebCircEnableCheckIn	Configures whether staff users can check items in	Yes
WebCircEnableCheckOut	Configures whether staff users can check items out	Yes
WebCircEnableInTransit	Configures whether staff users can marks items as In Transit	Yes
WebCircEnableRenewal	Configures whether staff users can renew items	Yes
WebCircEnableCirculationForBlockedUsers	Configures whether staff users can check out and renew for blocked users. If this value is set to false, a quick check out or renewal will result in the VerifyUserCleared status message to display.	Yes

While the keys are for configuring the system, you can edit the status lines and other text resources if necessary. These are included in the webresources.resx file located in the App_GlobalResources folder under the WebCirc application folder. You can edit this file using any standard text editor (like notepad). This file includes all the values for the status lines and tool tips in the Web Circ module. Since Web Circ is an internal application, you should rarely have the need to change any values in the file. For reference, the default values for all entries are listed in Appendix A of this document.

Odyssey Helper

The Odyssey Helper helps ILL staff utilize outside scanners and other means of acquiring digital documents to process electronic articles within ILLiad. It allows you to specify a folder of TIFs labeled with the ILLiad Transaction Numbers for the Odyssey Helper to view/monitor. When ILL staff open the Odyssey Helper and refresh the list, it displays the list of items that can be sent via Odyssey. Staff then only need to click the button to send all the documents at once. The latest version of Odyssey Helper works for both Document Delivery and Lending requests.

The Odyssey Helper does all the same functionality that the ILLiad Client does (minus the actual scanning of documents). It marks the article as found, updates OCLC or other external service providers if necessary, adds any billing information to billing tables and sends the tif file to the server for delivery to either the borrowing library or document delivery customer using the Odyssey Manager.

Rapid Manager

A new Rapid Manager will be available for the sites who interact with the Rapid service. The Rapid Manager service allows sites to download Rapid Lending requests to ILLiad and update them seamlessly in the client. It also sends Borrowing requests to the Rapid service either manually or unmediated through the ILLiad client using routing rules.

The Rapid Manager does not install by default when updating to version 7.3. If you are a Rapid library, first update your system to version 7.3, verify that the system is running fine for a few days, and then contact Atlas Systems directly at service@atlas-sys.com to coordinate the installation of the Rapid Manager service and setup of the customization keys.

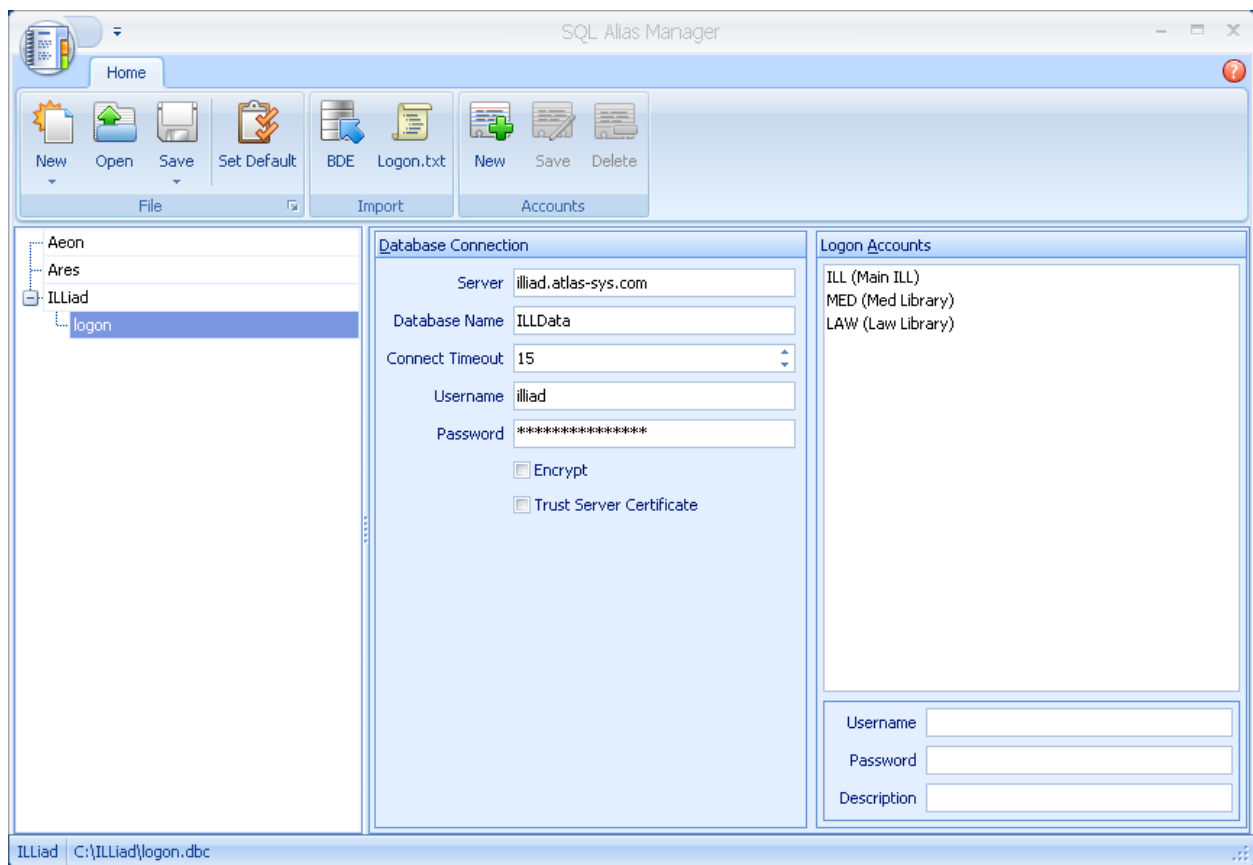
SQL Alias Manager

The new SQL Alias Manager is how connections between the new versions of ILLiad that use the .NET framework (web reports, System Manager service, Web Circ module, Customization Manager, and Rapid Manager) and the SQL Server are managed. This will eventually replace the BDE as the means to connect to the database. During this transition period as each component is rewritten, both interfaces will be used.

The SQL Alias Manager shows available products and DBC files listed on the left with database connection information in the middle for the selected DBC file. Logon accounts for Shared Server systems are listed on the right, which replace the logon.txt file.

ILLiad Components that require Logon.dbc

For ILLiad 7.3, the following components require the Logon.dbc file to be present on the machine running the application: Customization Manager, Web Circ, Web Reports, System Manager, and Rapid Manager. In future releases (Version 8 and beyond), additional components will also use the dbc alias files instead of any BDE settings.



DBC File

The Alias Manager creates a file called Logon.dbc that sits alongside the current Logon.txt file. The Logon.dbc file stores the SQL server connection string information and the ILLiad site information and password(s). This file is encrypted and it can only be opened using the Alias Manager. If you have already specified this file using the Alias Manager, it will automatically open the next time you open the Alias Manager.

You can also import your current database settings from the BDE and your current logon settings from the logon.txt file on the local machine. Under the Import section of the ribbon, you can import each piece and save it in a new

logon.dbc file. You can have multiple logon.dbc files on a machine and each one you've opened in the Alias Manager will be listed.

DBC File Location

Where you save this file is stored in the registry and will be used by all the different ILLiad components on that machine. The current default DBC file for the machine is displayed at the bottom of the Alias Manager in the status bar. To select a specific DBC file to use for the system, choose it on the list on the left and hit the Set Default button in the ribbon.

For the components that use the new DBC file, you no longer have to have separate logon.txt files in each folder. The single location is sufficient.

Enhanced Security

Since the new SQL Alias Manager encrypts the logon.dbc file, a staff user can't see any passwords saved in the file. Opening the file in the Alias Manager will not display the passwords and will also not allow copying of the passwords using the clipboard.

OCLC ILLiad Version 7.3 Release Notes

These release notes include a list of items that were changed and improved in ILLiad 7.3, 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 7.3.

- Read this document to ensure you are aware of all changes that will affect your ILLiad installation both from a technical and processing standpoint.
- You must install the .NET 2.0 Framework on the server and on any client machines that require access to the new Customization Manager.
- Verify that in your 7.2 installation of ILLiad your customization key for EMailManagerSupport is set to Yes and you can send emails. When you update to 7.3 the email will send from the System Manager service on your server and if you have any firewall or SMTP issues, it would be best to clear those up before updating.
- If you are installing your own server (you are not hosted by OCLC or Atlas) be sure to read the Step by Step instructions document on how to update.

After You Update (changes necessary on the clients)

The step-by-step instructions detail all the changes necessary for updating the server to Version 7.3. But after updating the server there are still a few changes necessary on client workstations.

- If you currently access the Customization Manager via a shared folder, you will need to install it on the individual machines that need access. The Customization Manager no longer runs on a file share, but it is installed locally on the staff workstations that need it.
- For client machines that access the new Customization Manager, you need to run the SQL Alias Manager that is installed as part of the Customization Manager install on each of those machines. This will create the same logon.dbc file on each machine, but also set that location as the default location to look for the alias on that machine (in a registry key).

ILLiad Client

Borrowing/Doc Del Notifications

- Added customization keys BorrowingNotificationDocs and DocDelNotificationDocs. Documents listed in these keys are auto-opened when printing notifications.

Borrowing Request Form

- Wanted By field is now editable.

Check Out To Customer Form

- If a customer is blocked (B or BX) in ILLiad, when checking an item out the staff receive a confirmation dialog asking if they want to proceed.

Clear New Customers

- Any existing web sessions are now deleted when a username is disavowed. This prevents a user that is disavowed while still using the web from submitting any requests.
- Clear Users button on the Main Menu no longer displays when switching between Borrowing and Lending.
- Billing category shows if billing is enabled for Borrowing or Document Delivery. Previously it was only showing if Borrowing billing was enabled.

Copyright Form

- Added buttons next to radio selections that copy the currently selected title or ISSN to the search box and automatically search the Copyright Clearance Gateway.
- Added double-click search of copyright list on the Copyright form (list on right-hand side of form). This is useful if the journal title provided by the user is not complete enough to get results on the Copyright Clearance Gateway, but there is a complete title available in the copyright list on the right (those that have been requested over 5 times). You can double-click the title on the right to search the Copyright Clearance Gateway but it will still use the other citation information (year, pages, etc.) from the transaction selected on the left.

Doc Del Customer Contact

- Added sorting functionality from Borrowing to the Doc Del Customer Contact Form.

Doc Del Not Found

- Width and height of the Doc Del Not Found Form have been adjusted to remove scroll bars.

Edit Addresses

- When printing library addresses using Word templates from the Address maintenance form, if the DBF file does not exist, it will be automatically created.

Edit Customer

- Internal Number field displays in Account Information grid.
- Each field in the Account Information grid is selectable and able to be copied.
- When changing the delivery location or processing site for a user, the list of available NVTGC codes appears in a drop down box instead of a list of libraries with radio buttons. This allows for a longer list of codes.

Edit Request

- If you choose a radio button to limit by Request Type, the client correctly limits by Connection Manager errors or Odyssey errors. Previously, those error filters were not displaying any requests.
- In Lending, added Note table to search query if note field criteria is selected.

Electronic Delivery

- Thumbnails will now resize when the window is resized.

Email Sending

- Double quotes will not be changed to single quotes by ILLiad in email addresses. Double quotes are the correct way to wrap a friendly name in an e-mail address.

Email Import

- Added check to only add Note value if not empty. Previously, if the note field was blank the client would return a syntax error.

General

- Users must have ClientAccess in the Staff table enabled (via the User Manager) to be able to login to the ILLiad Client.

Flagging of Requests

- If a library receives a request that has already been updated to a certain lender symbol by the Odyssey Manager but the next lender is also sending it, it will flag that request in the ILLiad client. Flagged requests can be reviewed from the System Information form.

General Update Form

- Grids are being sorted using an ORDER BY clause by DateTime to ensure it displays correctly.

Lending Cancellation Email

- The <#ReasonForCancellation> tag now auto-replaces on emails that are not edited/viewed before sending.

Lending Check In from Library

- Text updated to say 'Select Only 'Item Shipped' Status' instead of 'Select Only 'Request Sent' Status'. Underlying functionality already worked this way.

Lending Importing - DOCLINE

- For DOCLINE import in Lending, the client verifies the library is not blocked before checking if the request is a rush request.

Loansome Doc - DOCLINE

- CitedTitle is now set to LoansomeDoc when importing, allowing system routing if desired.

Main Menu

- The query that checks to see if users need to be cleared has been changed to exclude internal system users.

OCLC Search Form

- ISSN added when importing bibliographic information from OCLC form using the Copy Bibliographic Information to Request menu option.

Odyssey in Lending

- Added ability to override a borrowing library's Odyssey setting. Choosing Override Odyssey on the Lender Address Form will remove the check from the checkbox on the Update Stacks Search form in ILLiad. It is possible to recheck this if you want to send via Odyssey anyway.

Overdues

- EventLog and History table logging revised for Borrowing and Lending overdues so that there are entries for all overdues run and the History table denotes if the 1st, 2nd, or 3rd notice has been sent.

Reprinting

- Query syntax has been fixed to allow reprinting.

Routing

- Added ORDER BY clause to the query for the Routing table in the client (to match what already existed in DLL). After a match is found the routing is halted and no further routing rules are applied.

System Information

- Fixed queries to handle quotes in error statuses.

ILLiad Web DLL

- OpenURL: Mapping has been added to compensate for OpenURL links or citations that are missing a default genre.
- Added AllowBlockedAccess customization key. If set to No then when a blocked user attempts to log on they are shown the Blocked.html page with the status line from SLBlocked.
- Include files can be user status-specific, like other pages in the ILLiad web.

- Deprecated NVTGCDescription from tag processing. If this tag exists on your web pages, you need to replace it with the NVTGC.
- Added ability to add <#USEREMAIL> tag to the status line. Status line replacement tags are specific to the status line and not used elsewhere in the DLL.
- Added SLNewUserOpen customization key to specify status line for NewAuthRegistration.
- Blocked users can no longer renew or resubmit requests.
- Added extra check for Awaiting Conditional Processing, Awaiting Direct Request Sending, Awaiting Unfilled Processing to prevent users from editing requests at these statuses.
- Added Renewed by Customer to filter of items that do not show as outstanding.
- When submitting a new user registration for Remote Authentication, the WebUserCanChangeSSN or WebUserCanChangeStatus keys are not used.
- Added regular expression validation of e-mail address and displaying error status if the e-mail address is not valid for Forgot Password
- Innovative PatronAPI PTYPE restrictions updated to work with latest DLL and pre-7.2 web pages.
- When a session ID exists and the DLL is running as remote auth, it will now verify the username for the session and the remote auth username are the same. If not, it will remove the session cookie and proceed to normal login procedure for remote auth.
- Disavowed users can no longer reset their password via the web while they are disavowed.
- RemoteAuth checks if BillingActive or BillingActiveDocDel are set to Yes to send new users to the EditUserAccount form. Previously, the RemoteAuth registration was not checking to see if billing was active.
- For RemoteAuth, LDAP and ILLiadExclusive registrations (those that direct users to NewAuthRegistration or ChangeUserInformation), the user's ExpirationDate field is set just like other registrations.
- An item at status Request Finished, Delivered to Web, Awaiting Return Label Printing or In Transit cannot be cancelled by a customer via the web.

Billing Manager

- Added ability to search invoices by check/reference number.
- Dollar amounts for payments limit so that staff can only type in two decimal places.

Connection Manager

- OCLC: Edition now imports into either the LoanEdition or PhotoItemEdition field in Transactions.
- When receiving a Recall message from OCLC, the RenewalsAllowed value for the request is set to No.
- Single quotes in lending reason for cancellation reasons no longer cause an error when importing into ILLiad.
- Borrowing items that are at Delivered to Web will not have their status changed if a Conditional response comes in after the item has been filled due to a timing issue.

Odyssey Manager

- You can now set Trusted Sender for Odyssey to Always but select specific libraries to not-trust. The checkbox on the Lending Address form switches to "Trusted Sender Override" if you are set to Always. Selecting that box will make the selected institution require mediation.

System Manager

- When the Electronic Delivery Cleanup portion of the System Manager finds a PDF file in the WebPDFPath, it looks to see if the tif file exists in the received folder and will remove it.

- If there is an error with the System Manager being able to connect to the SMTP server (not a problem with the email message itself), it will note that error and move onto the next email. This prevents one site from breaking emails for everyone on shared servers.

User Manager

- Added fields for ClientAccess, WebCircAccess, WebReportsAccess, StaffFirstName, StaffLastName, and StaffDescription to the grid of staff users. After updating to 7.3, ClientAccess, WebCircAccess and WebReportsAccess are all enabled for all staff. You can uncheck those as needed.
- Made the grid of staff users exportable.

Web Reports

- All web reports have been rewritten with 7.3 fixing many performance, presentation, and printing problems.
- Web reports no longer need to use IIS permissions to restrict access but require a staff login and password to access reports. After the update you can remove any restricted IIS permissions to the webreports folder.
- While logged in, any parameters selected (date ranges, groups, etc.) are retained from report to report but can be changed if needed.
- Requests Finished and Cancelled report no longer shows items that are finished by ElecDel Cleanup, eliminating duplicate entries.
- Doc Del Request Filled by Day Web Report no longer counts both Delivered to Web and Request Finished for articles so that items don't get counted twice.
- Who We Lend To now shows the library name.
- Borrowing Invoices Report no longer shows duplicate results.

Appendix

Appendix A - ILLiad Web Circ Webresources.resx Default Values

Setting Name	Default Value
ApplicationTitle	ILLiad Web Circulation
ChangeSiteMenuText	Change Site {0}
ChangeSiteMenuTooltip	Change your current site
CheckInFailure	Transaction {0} was unable to be checked in.
CheckInMenuText	Check In
CheckInSuccess	Transaction {0} was successfully checked in.
CheckOutFailure	Transaction {0} was unable to be checked out.
CheckOutMenuText	Check Out
CheckOutSuccess	Transaction {0} was successfully checked out.
Copyright	Copyright © 1998-2007 Atlas Systems, Inc. All Rights Reserved.
GenericFailure	An error has occurred. {0}
HomeMenuText	Home
HomeMenuTooltip	Go to the main page
InTransitFailure	Transaction {0} was unable to be marked as In Transit.
InTransitSuccess	Transaction {0} was successfully marked as In Transit.
InvalidRenewalPeriod	Renewals for Transaction {0} are only accepted between {1} and {2}.
InvalidSearchTerm	Please enter a valid search term.
InvalidTransaction	Invalid Transaction Number {0}
InvalidTransactionOwner	Transaction {0} does not belong to {1}. [Owned by {2}]
InvalidTransactionStatusForCheckIn	Transaction {0} is not available for Check In. [Current Status: {1}]
InvalidTransactionStatusForCheckOut	Transaction {0} is not available for Check Out. [Current Status: {1}]
InvalidTransactionStatusForInTransit	Transaction {0} is not available for In Transit. [Current Status: {1}]
InvalidTransactionStatusForRenewal	Transaction {0} is not available for Renewal. [Current Status: {1}]
LogoffMenuText	Logoff {0}
LogoffMenuTooltip	Logoff ILLiad Web Circulation
MainMenu	Main
MarkInTransitMenuText	Mark In Transit
PageTitleViewRequestFormat	View Request {0}
PageTitleViewUsernameFormat	{0}
QuickCircTransactionTextBoxPrefix	
QuickTasksMenu	Quick Tasks
RenewalFailure	Transaction {0} was unable to be renewed.
RenewalInvalid	Transaction {0} was unable to be renewed. {1}
RenewalsNotAllowed	Renewals are not allowed for Transaction {0}.
RenewalSuccess	Transaction {0} was successfully renewed.
RenewMenuText	Renew
SearchTabText	Search
SiteMenuText	Site
TooltipQuickCheckInButton	
TooltipQuickCheckInTextbox	Transaction Number of item to be checked in
TooltipQuickCheckOutButton	
TooltipQuickCheckOutTextbox	Transaction Number of item to be checked out
TooltipQuickMarkInTransitButton	
TooltipQuickMarkInTransitTextbox	Transaction Number of item to be marked in transit
TooltipQuickRenewButton	
TooltipQuickRenewTextbox	Transaction Number of item to be checked in
TooltipTransactionCheckIn	
TooltipTransactionCheckOut	
TooltipTransactionMarkInTransit	
TooltipTransactionRenew	
TransactionTasksMenu	Transaction Tasks
UserBlocked	BLOCKED

UserBlockedCssClass	failure
UserCleared	
UserClearedCssClass	success
UserDisavowed	Disavowed
UserDisavowedCssClass	failure
UserNew	User Registration Incomplete
UserNewCssClass	failure
UserNotCleared	Not Cleared
UserNotClearedCssClass	failure
VerifyPieces	Verify the correct number of pieces
VerifyUserCleared	User {0} is currently blocked. Please direct {0} to the Interlibrary Loan Office.