



ILLiad
International Conference

Pay No Attention to that Person Behind the Curtain: ILLiad Administration and Defense against Flying Monkeys





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- Jennifer Cella and Kevin Ford



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“No thief, however skillful, can rob one of knowledge, and that is why knowledge is the best and safest treasure to acquire.”

— L. Frank Baum, *The Lost Princess of Oz*



- Introductions

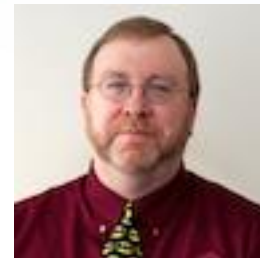
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- Your Participation is Welcome





Topics:

- ILLiad Server Side Overview
 - Optional Configurations Overview
 - Communication Overview
 - Authentication Overview
- ILLiad Web Interface
- ILLiad Server Update
- Client Installation and Updating
- Customization Manager
- Email Editing
- Routing, EMailRouting, and Custom Queues
- Client Staff Manager and Customizations



FLYING MONKEYS



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ILLiad Server Side Overview

(A quick peek behind the Wizard's curtain.
Shh. Don't tell anyone.)



- Components of an ILLiad Server:
 - **ILLiad Database**
 - Usually (but not always) named **ILLData**.
 - Contains SQL Logons for each site (if more than one).
 - Contains All Associated Tables, Views, Schemas, and Users.
 - Contains automated SQL Backup Jobs.



- SQL Server Management Studio (2012):

The screenshot shows the Microsoft SQL Server Management Studio interface. The title bar reads "SQLQuery1.sql - kcf-alpha.cloudapp.net.ILLData (sa (51))* - Microsoft SQL Server Management Studio". The main window contains a query editor with the text "Select * from Transactions". Below the query editor is a results grid with the following data:

TransactionNumber	Username	RequestType	LoanAuthor	LoanTitle	LoanPublisher	LoanPlace	LoanD
1	hford	Loan	Smith	Testing ISO ILL	Atlas	Virginia Beach	NULL
2	hford	Loan	Bin, David.	Statide rising /	NULL	NULL	NULL
3	DEV	Article	NULL	NULL	NULL	NULL	NULL
4	DEV	Loan	Zac Bissonnette	Debt-free U : how I paid for an outstanding coll...	New York : Portfolio/Penguin, 2010	NULL	NULL
5	TLS	Article	NULL	NULL	NULL	NULL	NULL
6	TLS	Loan	McKeon, Michael, 1943-	The origins of the English novel, 1600-1740 /	Baltimore : Johns Hopkins University Press, c1987.	NULL	NULL
7	TLS	Article	NULL	NULL	NULL	NULL	NULL
8	DEV	Article	NULL	NULL	NULL	NULL	NULL
9	AtlasDev	Article	NULL	NULL	NULL	NULL	NULL
10	AtlasDev	Loan	Frazier, Charles, 1950-	Cold mountain /	NULL	NULL	NULL
11	23	TLS	Article	NULL	NULL	NULL	NULL
12	24	DEV	Article	NULL	NULL	NULL	NULL
13	25	DEV	Loan	Boucher, Virginia, 1929-	Interlibrary loan practices handbook /	Chicago : American Library Association, 1997.	NULL
14	26	DEV	Article	NULL	NULL	NULL	NULL
15	27	DFV	Article	NI III	NI III	NI III	NI III

The status bar at the bottom indicates "Query executed successfully." and "41 rows".



- SQL: Most Important Database Tables
 - **Transactions**
 - Contains data specific to individual requests.
 - **Users / UsersALL**
 - Contains data specific to Users/Patrons/Customers.
 - **LenderAddresses / LenderAddressesALL**
 - Contains data specific to the Borrowing/Lending institutions you deal with.
 - **Customization**
 - Determines how your ILLiad system behaves.
 - **LocalInfo**
 - Contains your institution's "Contact Information".

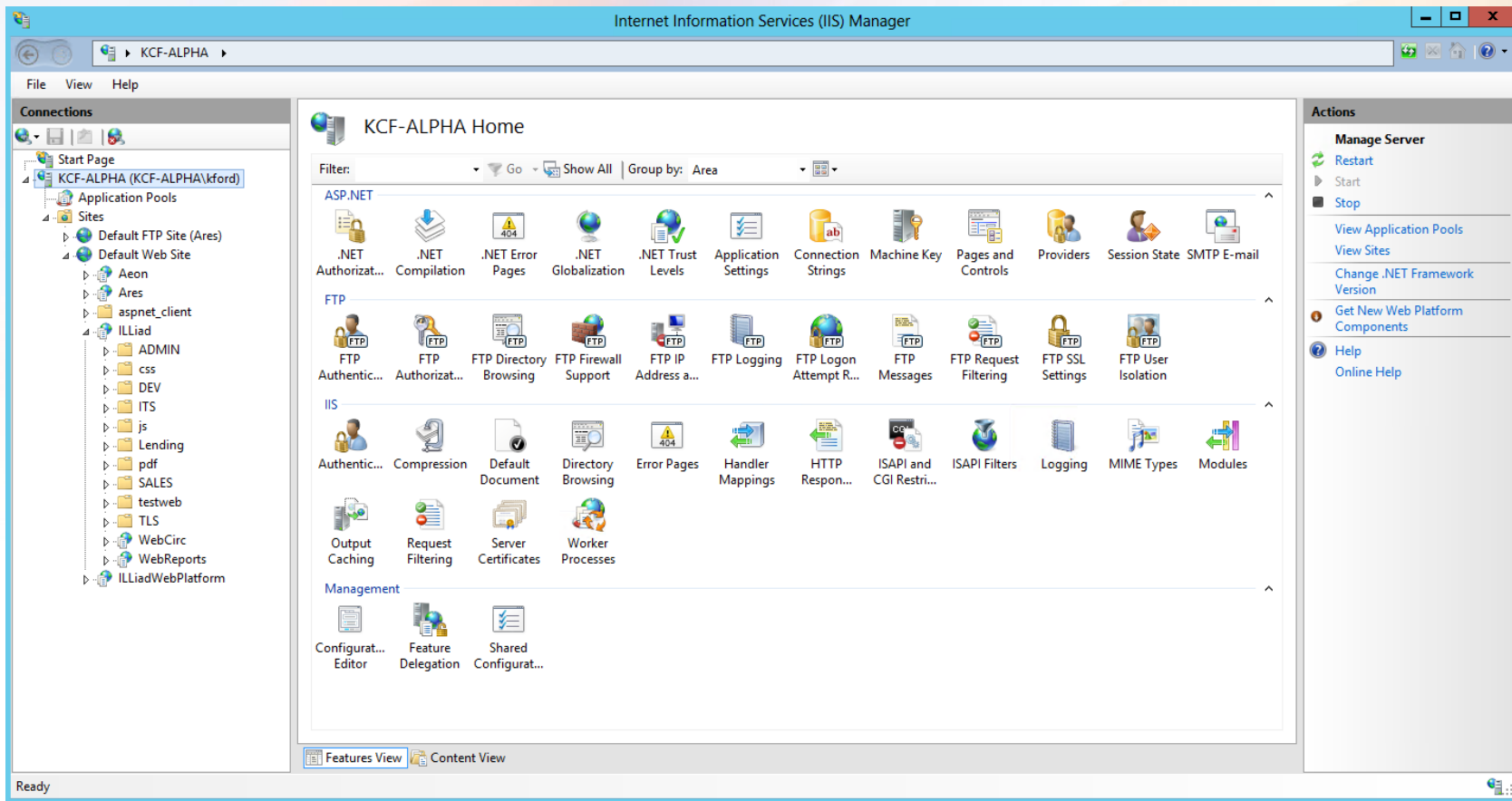


- Components of an ILLiad Server:
 - **Web Server (IIS)**
 - Runs your ILLiad pages using HTML files and the ILLiad DLL
 - Customer Web Pages (Borrowing and/or Doc Del)
 - Lending Web Pages
 - Web Reports
 - WebCirc
 - ILLiad Web Platform – (new with version 8.4).
 - Mechanism for communication between ILLiad other systems.
 - Currently works with **Aeon** (Special Collections) and **Article Exchange**.
 - Will be expanded upon in future versions to include other systems.
 - Includes a PDF directory for Electronic Article Delivery



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- IIS 8:

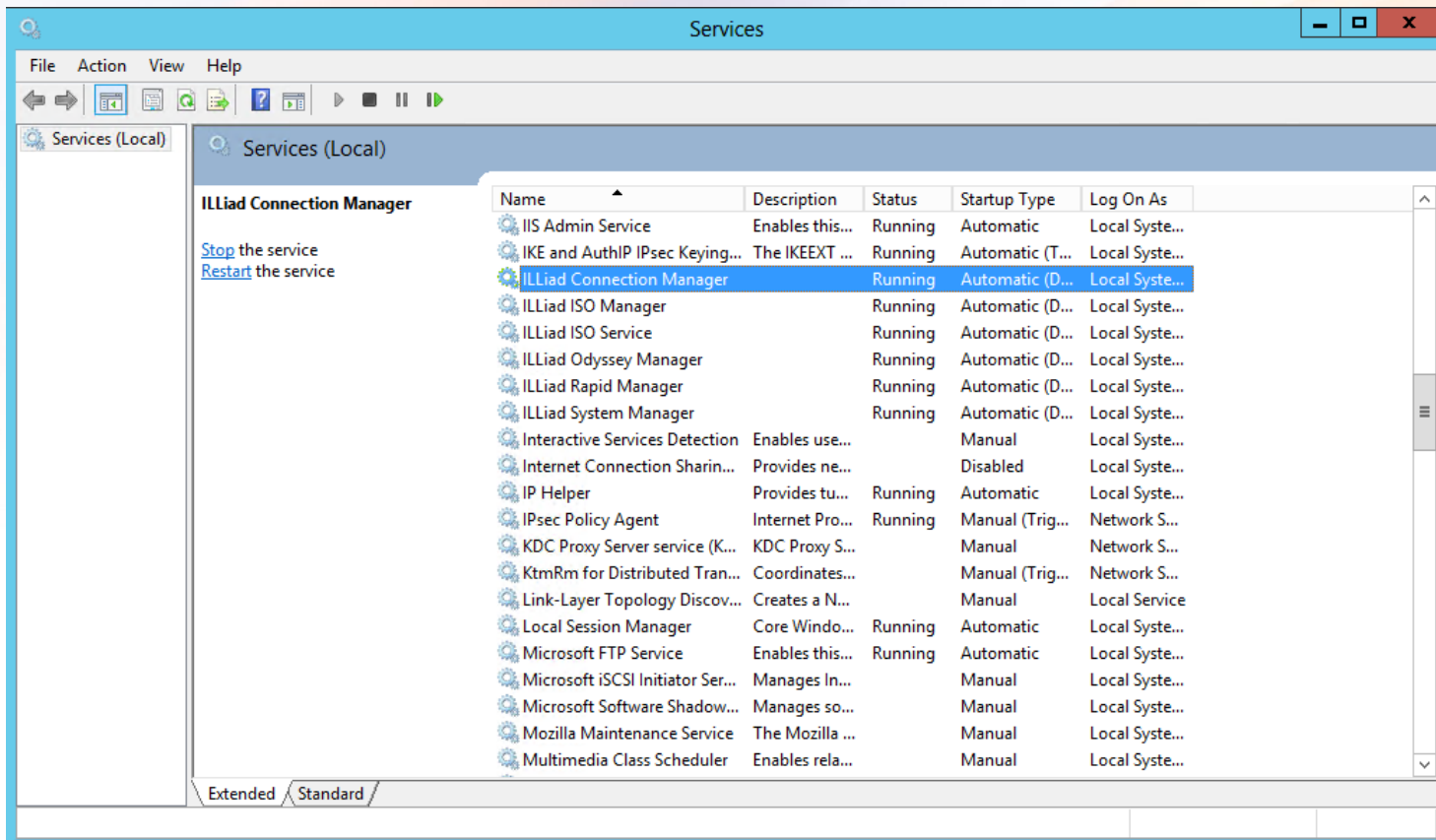




- Components of an ILLiad Server:
 - **ILLiad Services**
 - Connection Manager
 - OCLC Communication
 - Odyssey Manager
 - Electronic Article Sending and Receiving
 - System Manager
 - Emails/Electronic Delivery Cleanup/System Addons
 - Rapid Manager
 - Rapid Communication
 - ISO Manager/ISO Service
 - ISO ILL Communication



- ILLiad Services:

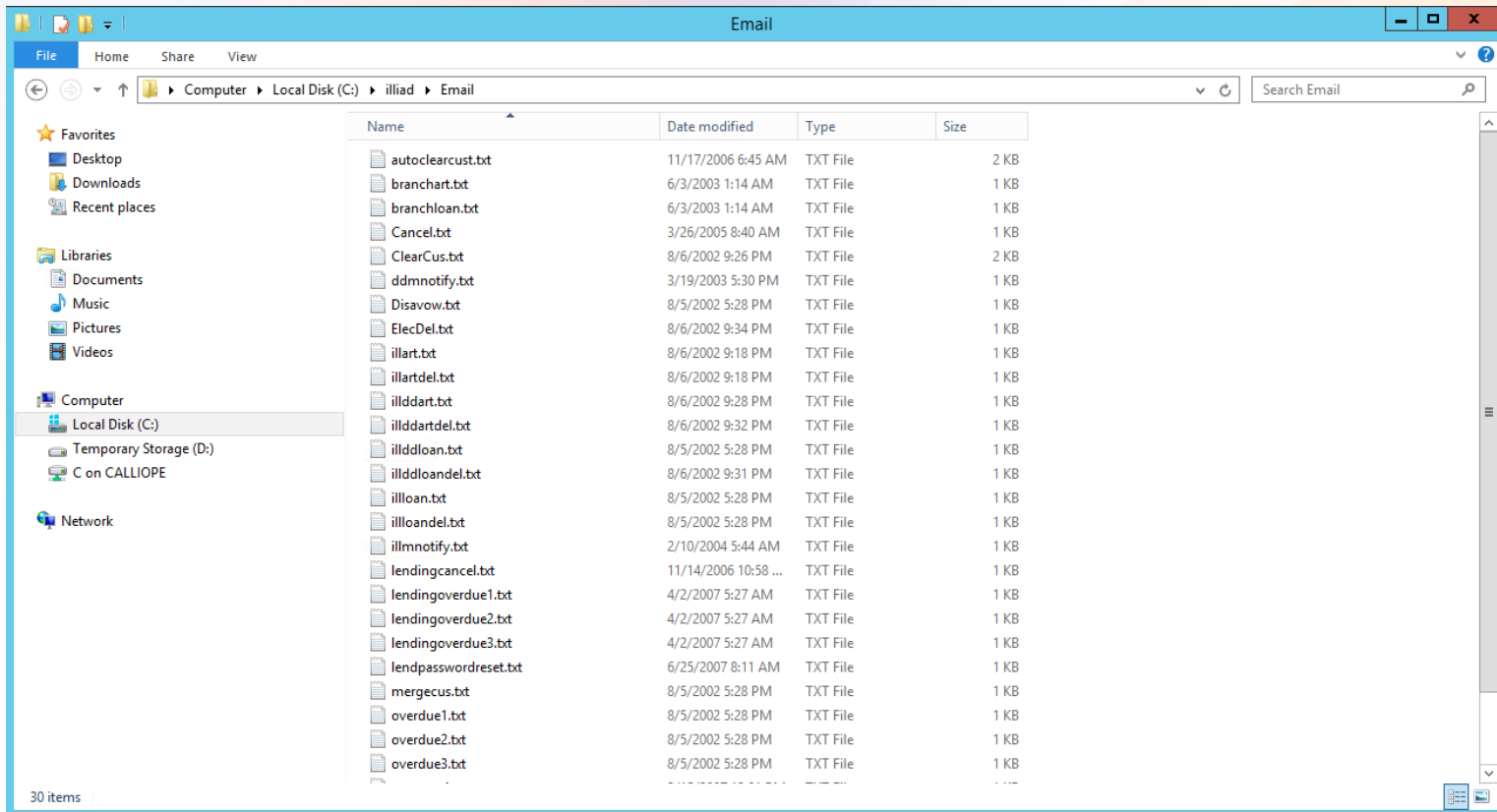




- Components of an ILLiad Server:
 - **Server-Specific Template files**
 - Templates for any Emails Generated by the ILLiad DLL or ILLiad Services:
 - Electronic Delivery Notifications
 - AutoClear
 - Password Reset
 - These need to exist on the server, regardless of where your regular templates may be located.



- **Template Files:**





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Optional Configurations Overview

(Why does **MY** ILLiad system look a little different?
Have the Flying Monkeys been here?)



- System Configurations that alter Basic System Function:
 - **Delivery Locations**
 - Allows the User to specify a Pickup Location.
 - Does not impact ILL processing other than:
 - Delivery-Location-specific Emails (optional)
 - Final destination of the item for pickup.
 - **Shared Server (Multi-site)**
 - Allows multiple parallel processing paths
 - Separates processing for each site from any others.



- Delivery Locations:

<https://prometheus.atlas-sys.com/display/illiad/Adding+Delivery+Locations>

- Can be added at any point.
- Requires several SQL Queries to be run on the Database to create.
 - **Coordinate this with whoever hosts the system (OCLC/Atlas).**
- Don't forget to add the new NVTGC/Site options to your web pages once they exist (so users can select them).
 - Custom Dropdown Table
 - NewUserRegistration.html / NewAuthRegistration.html
 - ChangeUserInformation.html



- Shared Server (Multi-Site):

<https://prometheus.atlas-sys.com/display/illiad/Shared+Server+Support>

- ****Requires Contractual Changes****.
 - Contact OCLC for estimate/contract/etc.
 - Once the contract is taken care of, OCLC will contact Atlas to coordinate the conversion process and/or site addition.
- Requires an additional Setup Program to be run on the Database by Atlas.
 - Modifies certain database Tables.
 - Adds Site-specific SQL Logons.



- Shared Server (Multi-Site) Database Changes:
 - **UsersALL**
 - Contains data specific to Users/Patrons/Customers.
 - Site-specific SQL Views create a “**Users**” view of the data used by the system for each site.
 - **LenderAddressesALL**
 - Contains data specific to the Borrowing/Lending institutions you deal with.
 - Site-specific SQL Views create a “**LenderAddresses**” view of the data used by the system for each site.



- Shared Server (Multi-Site) Database Changes:
 - **Customization**
 - Determines how your ILLiad system behaves.
 - Expands to include Site-specific keys for almost everything.
 - **LocalInfo**
 - Contains your institution's "Contact Information".
 - Expands to include separate Site-specific entries for each site on the system.



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Communication Overview

(How does this part of the system talk to this other part?
No crystal ball necessary.)



- How does your system communicate with:
 - Itself? (Client/Web DLL to Database, Odyssey Docs)
 - SQL
 - Odyssey
 - Atlas? (Version Checking)
 - Client Updates
 - Other ILL Systems? (Requesting and Updating)
 - OCLC, Docline, Rapid
 - Odyssey
 - ISO ILL
 - Your Users/Patrons/Customers? (Email)
 - Email/SMTP



- Ports:
 - SQL Connection Port: **1433** (alt. **1344** for hosted systems)
 - Open outbound from ILLiad Web Server and Client IPs to ILLiad Database Server.
 - Note: **OCLC/Atlas Firewalls for Hosted systems are opened to Specific IP addresses (or ranges), on request.**
 - Public Web Pages Port: **443** (SSL) or **80**
 - Open inbound from ILLiad Web Server to all or any IP ranges that are allowed access to the ILLiad web pages.
 - OCLC Communication Port: **443**
 - Open outbound from ILLiad Web Server and Client IPs to **webservices.oclc.org**



- Ports:
 - ILLiad Update Server (**Passive FTP**)
 - Open outbound from ILLiad Web Server to **update.atlas-sys.com**.
 - This only needs to be open at the time an ILLiad version update is being applied. Can be closed otherwise.
 - Client Updates (No Server Update Required) Port: **80**
 - OCLC Article Exchange Port: **443**
 - Open outbound from ILLiad Web Server to **webservices.oclc.org**.



- Ports:
 - Odyssey Communication Port: **7968**
 - Open inbound/outbound from Client IPs to ILLiad Web Server IP
 - Open inbound/outbound from ILLiad Web Server IP to any Odyssey Sender/Receiver.
 - **Note: The Odyssey Manager service will discard anything sent over this port that is not a recognized TIFF or PDF document with an appropriately formatted header.**



- Optional Ports:
 - Z39.50 Port: **Varies**
 - Contact your Z39.50 Admins for specifics.
 - ISO ILL Port: **1611**
 - Open inbound/outbound from ILLiad Web Server IP to any ISO ILL Sender/Receiver.
 - Innopac PatronAPI Port: **4500**
 - Open outbound from ILLiad Web Server IP to PatronAPI Server.
 - LDAP Port: **389** or **636** (SSL)
 - Open outbound from ILLiad Web Server IP to LDAP server.
 - LDAP Server may also need to be configured to allow authentication.



- SMTP:
 - Regardless of how your system's email is set up, your ILLiad Server (System Manager) needs to be able to access the specified SMTP Server using the specified port.
 - Default SMTP Port: **25**
 - Can be any port you set up to work.
- Hosted SMTP:
 - If there are problems connecting to a local SMTP server from a Hosted ILLiad system, Hosted SMTP is possible.



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Authentication Overview

(How do we keep the Nomes out?)



- Authentication Options:
 - **Basic ILLiad Authentication**
 - No setup/additional ports required.
 - Allows the user to select a username and password and register with the system
 - New Users are reviewed by Staff and approved/disavowed.
 - Stand-Alone Registration is allowed.



- Authentication Options:
 - **ILLiad Exclusive Authentication/Importing an Auth. Database**
 - Involves importing User information into the UserValidation table.
 - Sometimes done only once, but usually scheduled at regular intervals.
 - Needs a mechanism to get the User information into the database.
 - Usually done via FTP and automated import functions.
 - If your ILLiad system is hosted, coordinate this with whoever hosts the system (OCLC/Atlas).



- Authentication Options:
 - **LDAP Authentication**
 - Authenticates against your local LDAP Server.
 - Configuration of several Customization Keys required.
 - Connection from ILLiad Server to LDAP Server: Port **389/636** (SSL).
 - **PatronAPI Authentication**
 - Authenticates against your local PatronAPI Server.
 - Configuration of several Customization Keys required.
 - Connection from ILLiad Server to PatronAPI Server: Port **4500**.



- Authentication Options:
 - **RemoteAuth Authentication/Single Sign-On** (Becoming more popular lately.)
 - Connection from ILLiad Server to Authentication Server.
 - Method varies with Authentication Type, but usually based on ISAPI redirect over the normal web port.
 - CAS
 - CoSign
 - EZProxy
 - Shibboleth
 - Etc.
 - Possible to have multiple web page sets (Protected/Not) to allow for Non-RemoteAuth registration and use.



- Changing Authentication Methods:
 - This is possible and is becoming more and more common.
 - Things to consider:
 - ILLiad usernames **MUST** be unique (even in multi-site systems).
 - If the new and old Auth systems do not use the same username values for the same users, you have 2 options:
 1. Have everyone Re-register with new accounts.
 - **Optional:** The new and old accounts can be merged together (manually by Staff) after the fact.
 2. Perform a Username Conversion.
 - Existing records are modified (**in all database tables**) so that OLD Username values become the NEW Username.
 - Very complicated - Atlas can do this for you for a fee.



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The ILLiad Web Interface

(Silver Shoes or Ruby Slippers? You decide.)



- How do I access the web files?
 - FTP Access to hosted servers
 - Access is restricted by IP Address
 - Use Internet Explorer or FileZilla
 - <ftp://YourServerName.atlas-sys.com>
 - Enter hosted username and password provided
 - ILLiad directory displays
 - Using Windows Explorer select the files and copy them to your local machine for editing
 - Downloaded a set of Default Web Pages
 - <https://atlas-sys.com>
 - Documentation – ILLiad 8.4 – ILLiad Downloads



- FTP via Internet Explorer

The screenshot shows an Internet Explorer browser window displaying the FTP root at <ftp://jensilliad.atlas-sys.com/>. The browser's address bar and menu bar are visible. Below the browser window, a Windows Explorer window is open, showing the local file system structure for the Internet Explorer cache. The Explorer window displays a list of files and folders, including a 'Favorites' section with 'Desktop', 'Downloads', 'Dropbox', and 'Recent Places'. The main pane shows a directory structure with folders like 'css', 'Lending', 'pdf', 'testweb', 'WebCirc', 'WebReports', 'Libraries', 'Documents', 'Music', 'Pictures', 'Videos', 'Computer', 'BOOTCAMP (C:)', and 'Untitled (E:)', and a 'Network' section. The file list includes various HTML files, a DLL file, and a web.config file.

FTP root at jensilliad.atlas-sys.com

To view this FTP site in Windows Explorer: press Alt, click **View**, and then click **Open FTP Site in Windows Explorer**.

Date/Time	Size	File Name
04/04/2011 04:04PM	1,070	AboutILLiad.html
04/04/2011 04:04PM	7,303	ArticleRequest.html
04/04/2011 04:04PM	817	Blocked.html
04/04/2011 04:04PM	7,533	BookChapterRequest.html
04/04/2011 04:04PM	2,506	ChangePassword.html
04/04/2011 04:04PM	10,067	ChangeUserInformation.html
04/04/2011 04:04PM	7,214	ConferencePaperRequest.html
10/28/2011 10:19AM		Directory css
04/04/2011 04:04PM	1,732	DetailedInformation.html
04/04/2011 04:04PM	814	DisavowedUsername.html
04/04/2011 04:04PM	3,054	EditAccountInformation.html
04/04/2011 04:04PM	7,414	EditArticleRequest.html
04/04/2011 04:04PM	7,636	EditBookChapterRequest.html
04/04/2011 04:04PM	7,325	EditConferencePaperRequest.html
04/04/2011 04:04PM	7,308	EditGenericRequestTesting.html
04/04/2011 04:04PM	7,783	EditLoanRequest.html
04/04/2011 04:04PM	3,619	EditOtherRequest.html
04/04/2011 04:04PM	5,664	EditPatentRequest.html
04/04/2011 04:04PM	6,414	EditReportRequest.html
04/04/2011 04:04PM	5,385	EditStandardsDocumentRequest.html
04/04/2011 04:04PM	5,599	EditThesisRequest.html
04/04/2011 04:04PM	1,418	ElectronicDelivery.html
04/04/2011 04:04PM	4,950	ElectronicDeliveryInformation.html
04/04/2011 04:04PM	923	ElectronicDeliveryUndelete.html
04/04/2011 04:04PM	719	Error.html
04/04/2011 04:04PM	8,598	FAQ.html
04/04/2011 04:04PM	4,741	FirstTime.html
04/04/2011 04:04PM	1,530	ForgotPassword.html
04/04/2011 04:04PM	7,204	GenericRequestTesting.html
08/01/2012 10:45AM	2,740,224	ILLiad.dll
08/20/2011 05:52PM	2,729,984	ILLiad.dll.20120516122012.replaced
05/16/2012 12:20PM	2,728,448	ILLiad.dll.20120801093357.replaced
08/01/2012 09:33AM	2,750,464	ILLiad.dll.20120801093542.replaced

Windows Explorer view of the local file system:

- The Internet > jensilliad.atlas-sys.com
- Organize
- Favorites
 - Desktop
 - Downloads
 - Dropbox
 - Recent Places
- Libraries
 - Documents
 - Music
 - Pictures
 - Videos
- Computer
 - BOOTCAMP (C:)
 - Untitled (E:)
- Network

File list in Explorer:

- css
- Lending
- pdf
- testweb
- WebCirc
- WebReports
- AboutILLiad.html
- ArticleRequest.html
- Blocked.html
- BookChapterRequest.html
- ChangePassword.html
- ChangeUserInformation.html
- ConferencePaperRequest.html
- DetailedInformation.html
- DisavowedUsername.html
- EditAccountInformation.html
- EditArticleRequest.html
- EditBookChapterRequest.html
- EditConferencePaperRequest.html
- EditGenericRequestTesting.html
- EditLoanRequest.html
- EditOtherRequest.html
- EditPatentRequest.html
- EditReportRequest.html
- EditStandardsDocumentRequest.html
- EditThesisRequest.html
- ElectronicDelivery.html
- ElectronicDeliveryInformation.html
- ElectronicDeliveryUndelete.html
- Error.html
- FAQ.html
- FirstTime.html
- ForgotPassword.html
- GenericRequestTesting.html
- NewUserRegistration-orig.html
- NLMDDRequest.html
- OtherRequest.html
- PatentRequest.html
- ReportRequest.html
- StandardsDocumentRequest.html
- ThesisRequest.html
- ViewAllRequests.html
- ViewDefaultDetailed.html
- ViewDetailedInformation.html
- ViewNotifications.html
- ViewNotificationsDetail.html
- ViewOutstandingRequests.html
- ViewRenewCheckedOutDetailedInformation.html
- ViewRenewCheckedOutItems.html
- ViewRequestHistory.html
- ViewResubmitCancelledRequests.html
- ViewResubmitDetailedInformation.html
- ViewSearchResults.html
- web.config



- FTP via FileZilla

The screenshot shows the FileZilla interface with the following details:

- Title Bar:** atlas@jac-alpha.cloudapp.net - FileZilla
- Host:** jac-alpha.cloudapp.net, **Username:** atlas, **Password:** [masked], **Port:** [empty], **Quickconnect** button.
- Log:**
 - Response: 200 PORT command successful.
 - Command: RETR Logon2.html
 - Response: 226 Transfer complete.
 - Status: File transfer successful, transferred 2,209 bytes in 1 second
 - Response: 125 Data connection already open; Transfer starting.
 - Response: 226 Transfer complete.
 - Status: File transfer successful, transferred 1,532 bytes in 1 second
- Local site:** jcella\Documents\ILLiad Web Page Edits
 - colorcop
 - CRM
 - Custom Office Templates
 - ILLiad
 - ILLiad Web Page Edits
 - My Data Sources
- Remote site:** /
 - ADMIN
 - css
 - DEV
 - ITS
 - js
 - Lending
- Local File List:**

Filename	Filesize	Filetype
..		
TLS		File folder
Logon.html	2,209	HTML
Logon2.html	1,532	HTML
- Remote File List:**

Filename	Filesize	Filetype	Last modified
LoanRequest.html	8,678	HTML File	5/31/2012 5:51:...
log4d.props	613	PROPS File	7/19/2013 10:0:...
Logon.html	2,209	HTML File	5/31/2012 5:51:...
Logon2.html	1,532	HTML File	5/31/2012 5:51:...
NewAuthRegistration.html	10,039	HTML File	5/31/2012 5:51:...
NewPassword.html	1,955	HTML File	5/31/2012 5:51:...
NewUserRegistration.html	11,255	HTML File	5/31/2012 5:51:...
NLMDDSRequest.html	1,921	HTML File	5/31/2012 5:51:...
- Transfer Queue:**

Server/Local file	Direction	Remote file	Size	Priority	Time
atlas@jac-alpha.cloudapp.n...	<<--	/TLS/ViewResubmitDetailedInformation.html	1,108	Normal	3/14/2014 10:48:34 AM
C:\Users\jcella\Document...	<<--	/TLS/ViewSearchResults.html	698	Normal	3/14/2014 10:48:34 AM
C:\Users\jcella\Document...	<<--	/TLS/ViewResubmitCancelledRequests.html	588	Normal	3/14/2014 10:48:34 AM
- Bottom Bar:** Queued files, Failed transfers, **Successful transfers (92)**, Synchronized browsing, Queue: empty



- What files do I need to download?
 - To get started - HTML files and Main.css
 - Single site servers download the files in the root folder
 - Shared Server Sites may have site specific folders
- How do I edit the files?
 - Use tools for editing standard HTML and CSS
 - Upload edited files to the TestWeb folder using FTP
 - TestWeb folder allows you to test edited pages before putting them into production
 - Forms have ‘sisters’ that have to match
 - ArticleRequest/EditArticleRequest
 - NewUserRegistration/NewAuthRegistration/ChangeUserInformation



- Web Editing Tools
 - DreamWeaver
 - <http://www.adobe.com/products/dreamweaver.html>
 - Beyond Compare
 - <http://www.scootersoftware.com/>
 - NotePad++
 - <http://notepad-plus-plus.org/>
 - Firebug
 - <https://getfirebug.com/>
 - ColorCop
 - <http://colorcop.net/>



- Customizing the Web

- Required Fields

- NewUserRegistration or NewAuthRegistration, and ChangeUserInformation pages

Required Field	Acceptable Value
NVTGC	ILL
NotifyGroup	Phone, E-Mail
DeliveryGroup	Hold for Pickup, Mail to Address
LoanDeliveryGroup	Hold for Pickup, Mail to Address
WebDeliveryGroup	Yes, No

- Fields can be hidden with a default value assigned
 - » Value is case sensitive and only uses Acceptable Value
 - » `<input type="hidden" name="NVTGC" value="ILL" />`



- Customizing the Web
 - Web Validation
 - Controlled by Regular Expressions
 - WebValidation table located in the Customization Manager
 - Default validation .+ requires that a field not be 'blank'
 - Add/remove required fields
 - Copy existing entries and edit form names
 - Delete or use .* makes the field required, anything **including** a blank
 - Edit error messages
 - Advanced Regular Expressions
 - Control field requirements
 - » Require an email address ending in atlas-sys.com
 - `^[_a-z0-9-]+(\.[_a-z0-9-]+)*@atlas-sys\.com$`



- Web Validation table

The screenshot displays the ILLiad Customization Manager interface. The main window is titled "WebValidation" and contains a table with the following columns: NVTGC, Formname, Fieldname, Validation, Error, and ErrorTag. The table lists various validation rules for different forms and fields.

NVTGC	Formname	Fieldname	Validation	Error	ErrorTag
DEV	ArticleRequest	NotWantedAfter	[^\d\d\d\d\d\d\d\d]	Not Wanted After is a required field.	ERRORNotWantedAfter
DEV	ArticleRequest	PhotoArticleTitle	.+	Photo Article Title is a required field.	ERRORPhotoArticleTitle
DEV	ArticleRequest	PhotoJournalTitle	.+	Photo Journal Title is a required field.	ERRORPhotoJournalTitle
DEV	ArticleRequest	PhotoJournalYear	.+	Photo Journal Year is a required field.	ERRORPhotoJournalYear
DEV	BookChapterRequest	NotWantedAfter	[^\d\d\d\d\d\d\d\d]	Not Wanted After is a required field.	ERRORNotWantedAfter
DEV	BookChapterRequest	PhotoJournalTitle	.+	Book Chapter Title is a required field.	ERRORPhotoJournalTitle
DEV	ChangePassword	Password1	.+	New Password is a required field.	ERRORPassword1
DEV	ChangePassword	Password2	.+	Verified Password is a required field.	ERRORPassword2
DEV	ChangeUserInformation	Address	.+	Address is a required field.	ERRORAddress
DEV	ChangeUserInformation	City	.+	City is a required field.	ERRORCity
DEV	ChangeUserInformation	EEmailAddress	.+	Email Address is a required field.	ERROREmailAddress
DEV	ChangeUserInformation	FirstName	.+	First Name is a required field.	ERRORFirstName
DEV	ChangeUserInformation	LastName	.+	Last Name is a required field.	ERRORLastName
DEV	ChangeUserInformation	Phone	.+	Phone Number is a required field.	ERRORPhone
DEV	ChangeUserInformation	SSN	.+	SSN is a required field.	ERRORSSN
DEV	ChangeUserInformation	State	.+	State is a required field.	ERRORState
DEV	ChangeUserInformation	Zip	.+	Zip Code is a required field.	ERRORZip
DEV	ConferencePaperRequest	NotWantedAfter	[^\d\d\d\d\d\d\d\d]	Not Wanted After is a required field.	ERRORNotWantedAfter
DEV	ConferencePaperRequest	PhotoJournalTitle	.+	Conference Name is a required field.	ERRORPhotoJournalTitle
DEV	EditArticleRequest	NotWantedAfter	[^\d\d\d\d\d\d\d\d]	Not Wanted After is a required field.	ERRORNotWantedAfter
DEV	EditArticleRequest	PhotoArticleTitle	.+	Photo Article Title is a required field.	ERRORPhotoArticleTitle
DEV	EditArticleRequest	PhotoJournalTitle	.+	Photo Journal Title is a required field.	ERRORPhotoJournalTitle
DEV	EditBookChapterRequest	NotWantedAfter	[^\d\d\d\d\d\d\d\d]	Not Wanted After is a required field.	ERRORNotWantedAfter
DEV	EditBookChapterRequest	PhotoJournalTitle	.+	Photo Journal Title is a required field.	ERRORPhotoJournalTitle
DEV	EditConferencePaperRequest	NotWantedAfter	[^\d\d\d\d\d\d\d\d]	Not Wanted After is a required field.	ERRORNotWantedAfter
DEV	EditConferencePaperRequest	PhotoJournalTitle	.+	Conference Name is a required field.	ERRORPhotoJournalTitle
DEV	EditLoanRequest	LoanAuthor	.+	Loan Author is a required field.	ERRORLoanAuthor



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The ILLiad Server Update

(Upgrading YOUR Tin Man for the 21st Century.)



- Updating the ILLiad Server
 - **Back up your ILLiad Database manually in SQL**
 - ILLiadUpdate.exe
 - Located in c:\illiad\admin on the server
 - Right Click -> Run as Administrator
 - SQL System Administrator (sa) username and password
 - ILLiad Server Automatic Updater Screen
 - Verify the paths in all of the fields on the lower left are correct
 - Available Updates display in the upper right
 - When you click Start ILLiad Server Update it will ask if you want to do a backup



ILLiad Server Automatic Updater 8.4.0.0

ILLiad Server Automatic Updater

Current Installed Versions

Billing Manager	8.3.1.0
Client	8.3.2.0
Client Setup	6.4.0.0
Connection Manager	8.3.2.0
Customization Manager	8.3.2.0
Database Manager	8.3.1.0
Electronic Delivery Cleanup	7.2.0.0
ISO ILL	8.1.1.0
ISO Manager	8.3.0.0
Odyssey Helper	8.3.2.0
Odyssey Manager	8.3.0.0
Rapid Manager	8.3.1.0
Server Automatic Updater	8.4.0.0
Shared Components	8.3.5.0
System Manager	8.3.2.0

Available Updates

- DLL - Version 8.4.0.0 (DLLUpdates\8.4.0.0\UpdateDLL-8.4.0.0.txt)
- Client - Version 8.4.0.0 (ClientUpdates\8.4.0.0\UpdateClient-8.4.0.0.txt)
- CustomizationManager - Version 8.4.0.0 (CustomizationManagerUpdates\8.4.0.0\UpdateCustomizationManager-8.4.0.0.txt)
- UserManager - Version 8.4.0.0 (UserManagerUpdates\8.4.0.0\UpdateUserManager-8.4.0.0.txt)
- BillingManager - Version 8.4.0.0 (BillingManagerUpdates\8.4.0.0\UpdateBillingManager-8.4.0.0.txt)
- OdysseyHelper - Version 8.4.0.0 (OdysseyHelperUpdates\8.4.0.0\UpdateOdysseyHelper-8.4.0.0.txt)
- OdysseyManager - Version 8.4.0.0 (OdysseyManagerUpdates\8.4.0.0\UpdateOdysseyManager-8.4.0.0.txt)
- ConnectionManager - Version 8.4.0.0 (ConnectionManagerUpdates\8.4.0.0\UpdateConnectionManager-8.4.0.0.txt)
- RapidManager - Version 8.4.0.0 (RapidManagerUpdates\8.4.0.0\UpdateRapidManager-8.4.0.0.txt)
- SystemManager - Version 8.4.0.0 (SystemManagerUpdates\8.4.0.0\UpdateSystemManager-8.4.0.0.txt)
- ISOManager - Version 8.4.0.0 (ISOManagerUpdates\8.4.0.0\UpdateISOManager-8.4.0.0.txt)
- WebCirc - Version 8.4.0.0 (WebCircUpdates\8.4.0.0\UpdateWebCirc-8.4.0.0.txt)
- WebReports - Version 8.4.0.0 (WebReportsUpdates\8.4.0.0\UpdateWebReports-8.4.0.0.txt)
- WebPlatform - Version 8.4.0.0 (WebPlatformUpdates\8.4.0.0\UpdateWebPlatform-8.4.0.0.txt)
- SharedComponents - Version 8.4.0.0 (SharedComponentsUpdates\8.4.0.0\UpdateSharedComponents-8.4.0.0.txt)
- WebPlatform - Version 8.4.1.0 (WebPlatformUpdates\8.4.1.0\UpdateWebPlatform-8.4.1.0.txt)

Selected Update Information

- Add File: Default Web Pages (DLLUpdates\8.4.0.0\Default\WebPages.zip)
- Run SQL Script: Add ExternalRequest field to Transactions table (DLLUpdates\8.4.0.0\Fix\WebAlertTimes.sql)
- Replace File: Web DLL (DLLUpdates\8.4.0.0\ILLiad.dll)
- Replace File: Lending Web DLL (DLLUpdates\8.4.0.0\ILLiadLending.dll)
- Update Key: VersionDLL (VersionDLL:8.4.0.0:ILL)
- Run SQL Script: Add FieldCustomizations table (ClientUpdates\8.4.0.0\AddFieldCustomizations.sql)
- Run SQL Script without Tags: Update CCC HomePage (ClientUpdates\8.4.0.0\UpdateCCCHomePage.sql)
- Add New Key: LendingOverdueReminderDocs (LendingOverdueReminderDocs\LendingOverdueReminderLetter.d)
- Add New Key: BorrowingOverdueReminderDocs (BorrowingOverdueReminderDocs\BorrowingOverdueReminderL)
- Update Key: VersionClient (VersionClient:8.4.0.0:ILL)
- Update Key: VersionCustomizationManager (VersionCustomizationManager:8.4.0.0:ILL)
- Update Key: VersionUserManager (VersionUserManager:8.4.0.0:ILL)
- Replace File: Billing Manager (BillingManagerUpdates\8.4.0.0\BillingManager.exe)
- Update Key: VersionBillingManager (VersionBillingManager:8.4.0.0:ILL)
- Update Key: VersionOdysseyHelper (VersionOdysseyHelper:8.4.0.0:ILL)
- Replace File: ILLiad Odyssey Manager (OdysseyManagerUpdates\8.4.0.0\OdysseyManager.exe)
- Update Key: VersionOdysseyManager (VersionOdysseyManager:8.4.0.0:ILL)
- Replace File: ILLiad Connection Manager (ConnectionManagerUpdates\8.4.0.0\ConnectionManager.exe)
- Update Key: VersionConnectionManager (VersionConnectionManager:8.4.0.0:ILL)
- Replace File: ILLiad Rapid Manager (RapidManagerUpdates\8.4.0.0\RapidManager.exe)
- Update Key: VersionRapidManager (VersionRapidManager:8.4.0.0:ILL)
- Replace File: ILLiad System Manager (SystemManagerUpdates\8.4.0.0\ILLiadSystemManager.exe)

File Download Progress

0 %

Installation Progress

0 %

Start ILLiad Server Update



- ILLiad Server Update Log
 - ILLiadUpdateLog
 - Located in c:\illiad\admin on the server
 - View in Notepad
 - Appended each time an update is run on the server

```
File Edit Format View Help
3/14/2014 6:22:19 PM: Opened: 3/14/2014 6:22:19 PM
3/14/2014 6:22:19 PM: *****
3/14/2014 6:22:19 PM:
3/14/2014 6:22:19 PM: Initializing logon settings|
3/14/2014 6:28:06 PM: Connecting to database
3/14/2014 6:28:07 PM: Checking if Microsoft .Net Framework v4.0 is installed
3/14/2014 6:28:07 PM: Microsoft .Net Framework v4.0 installed
3/14/2014 6:28:07 PM: Verifying SQL Server version
3/14/2014 6:28:07 PM: SQL Server is SQL2005 or higher
3/14/2014 6:28:07 PM: Confirming path c:\inetpub\wwwroot\illiad\ for WebDir
3/14/2014 6:28:07 PM: Confirming path C:\inetpub\wwwroot\illiad\ADMIN for WebToolsDir
3/14/2014 6:28:07 PM: Confirming path c:\illiad\ for ShareDir
3/14/2014 6:28:07 PM: Confirming path c:\illiad\setup\ for SetupDir
```




ILLiad
International Conference

Pay No Attention to that Person Behind the Curtain:
ILLiad Administration and Defense against Flying Monkeys

The ILLiad Client Installation

(Getting to Oz without a balloon.)



- Where do I get the installation file?
 - <http://www.atlas-sys.com/>
 - Documentation – ILLiad 8.4 – ILLiad 8.4 Downloads
 - Download the ILLiad Client Installer file locally
- How do I run installation file?
 - Locate the downloaded file
 - Right click and select 'Run as Administrator'
 - Accept the defaults
 - Do not move/copy files after the installation



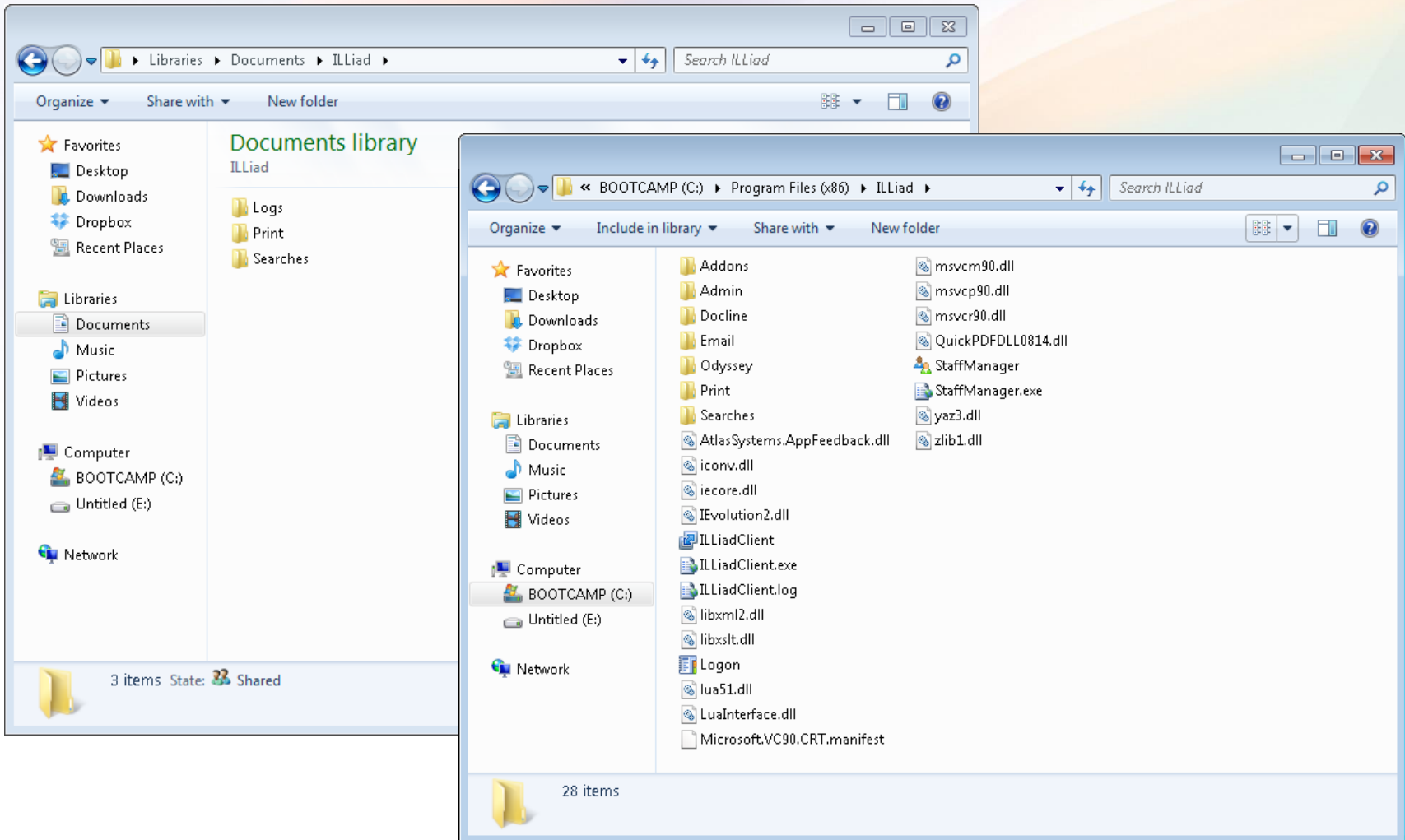
- What gets installed?
 - ILLiad Client
 - Staff client
 - Atlas SQL Alias Manager
 - Database connectivity
 - ILLiad Customization Manager
 - Management module
 - ILLiad Staff Manager
 - Staff account access control
 - Odyssey Helper
 - Batch processing of articles scanned outside of the ILLiad client



- Where does the installer put things?
 - C:\Program Files (x86)\ILLiad
 - ILLiad Client executable
 - Logon.dbc
 - Various folders – Print, Email, etc.
 - C:\Users\xxx\Documents\ILLiad
 - Three folders
 - Logs
 - » ILLiad Client and Customization Manager logs
 - Print
 - » .xls data files for printing
 - Searches
 - » Saved custom searches



- ILLiad File Locations – Client Machine

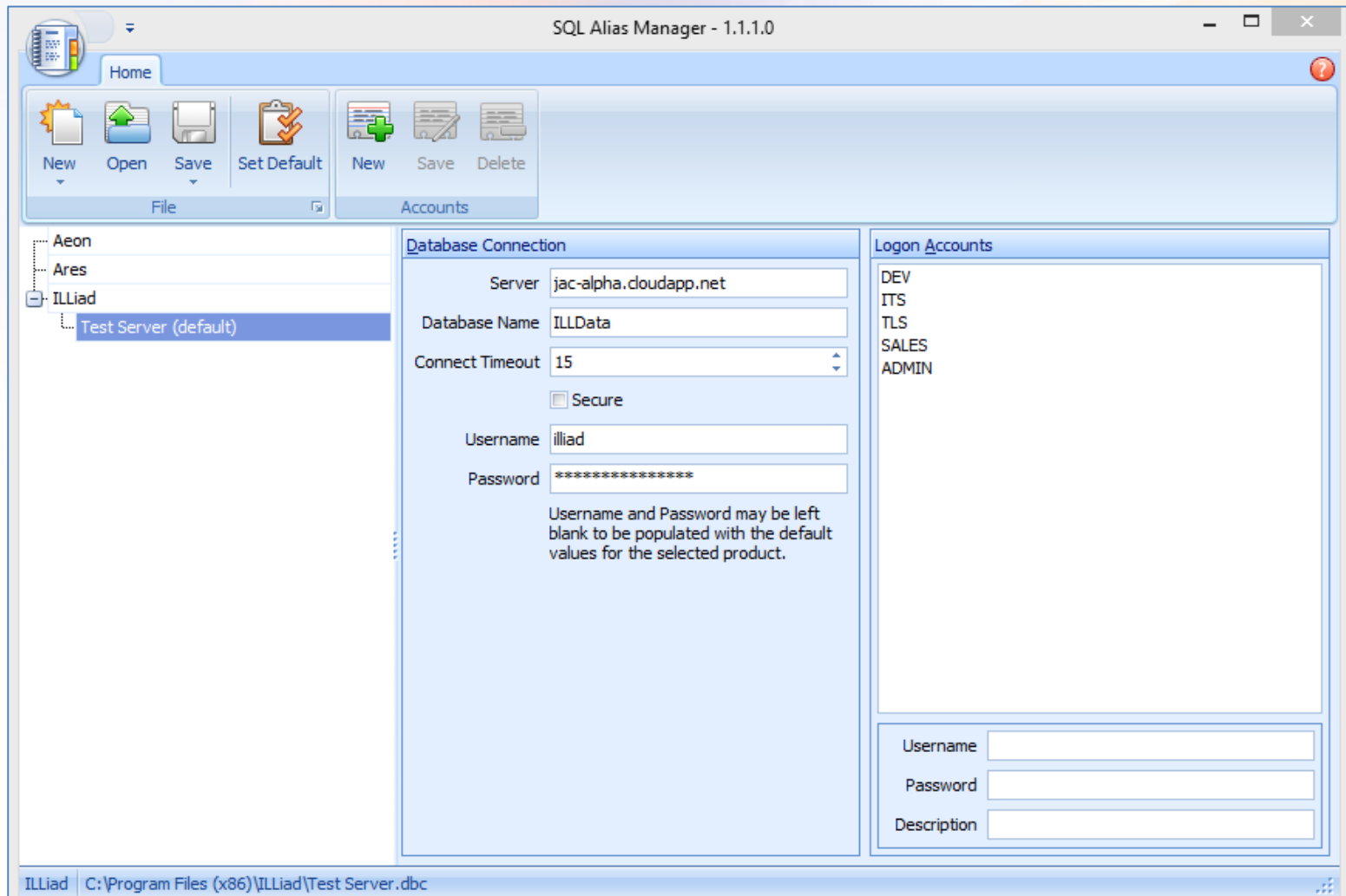




- Atlas SQL Alias Manager (SAM)
 - Used to create and maintain database connectivity information
 - Right click and ‘Run as Administrator’
 - Logon.dbc file
 - Server IP or DNS and Database Name
 - Username and Password auto-populate
 - Save file in C:\Program Files (x86)\ILLiad
 - Logon Accounts
 - Required for shared server installations
 - Save the Account and Save File
 - Alternate Configurations
 - Alternate port 123.123.123.123,1344
 - SQL named instance 123.123.123.123\Library



- Atlas SQL Alias Manager (SAM)





- How do I update the client?
 - Automatic update prompts
 - Client queries update server and displays a prompt at logon
 - ‘Run as Administrator’ may be required
 - Local user permissions may result in an update error
 - Download ILLiad Installer
 - Manually download the new version
 - <http://www.atlas-sys.com/>
 - » Documentation – ILLiad 8.4 – ILLiad 8.4 Downloads
 - Always right click and select ‘Run as Administrator’



- Troubleshooting
 - ILLiad Client Log
 - Enhanced (Debug) logging can now be enabled in the client!
 - » ILLiad icon -> Options -> Enable debug logging
 - » Revert after troubleshooting is complete
 - » Logs are written to My Documents-> ILLiad -> Logs
 - ILLiad Feedback
 - {i} in the upper right corner of client
 - Generates a zip file
 - » Containing Client log, Local system information, and Screen cap
 - File saved in My Documents-> ILLiad



ILLiad
International Conference

Pay No Attention to that Person Behind the Curtain:
ILLiad Administration and Defense against Flying Monkeys

The ILLiad Staff Manager and Client Customizations

(The Golden Cap, used to control Flying Monkeys.)



- ILLiad Staff Manager
 - Allows you to manage the staff user accounts
 - Create and delete staff users
 - Grant access to various components
 - Set permissions
 - Copy grids and layouts
 - Change passwords



- ILLiad Staff Manager

ILLiad Staff Manager 8.4.3.0

Staff

New User Copy User Delete User Change Password Save Cancel Copy Permissions Copy Layout & Grid Settings Delete Layout & Grid Settings

User Options Edit Options Permissions Layouts

Users Field Customizations

Drag a column header here to group by that column

Username	First Name	Last Name	NVTGC
> atlas			ALL
odc			ALL
admin			ALL
Staff	Staff	User	ALL
Student	Student	User	DEV

User Details

Username atlas

First Name

Last Name

Site ALL

Description Atlas Support User

Module Permissions

- Client Access
 - Can Customize Layouts?
 - OCLC Resource Sharing Settings
 - Can Manage Addons?
 - Can Logon to Web as User?
- Billing Manager - Borrowing
- Billing Manager - Document Delivery
- Billing Manager - Lending
- Customization Manager Access
- Database Manager Access
- Staff Manager Access
- Web Circulation Access Web Reports Access

Transaction Permissions

- Borrowing Read Borrowing Write
- Document Delivery Read Document Delivery Write
- Lending Read Lending Write

atlas | ALL Created Student



- Customized Client Layouts
 - Controlled by the Staff Manager
 - Copy from one user to another
 - Possible changes
 - Rename a field in the client
 - Suppress information
 - Rearrange the display of information



• Client Customization – Staff User

The screenshot displays the ILLiad Client 8.4.3.0 interface. The main window is titled "Search Users Results - ILLiad Client 8.4.3.0" and shows a search for user "jcella". The user details are displayed in a form with the following fields:

Local/Mailing Address		Other/Notification Address		Delivery Methods	
Address	Atlas Systems	Address		Notification Method	E-Mail
City	Virginia Beach	City		Delivery Method	Hold for Pickup
State	VA Zip 23461	State		Loan Delivery Method	Hold for Pickup
Country		Country		Electronic Delivery	Yes

The "Local/Mailing Address" and "Other/Notification Address" sections are highlighted with a red box. The "Delivery Methods" section is also visible. The interface includes a navigation menu with options like "Home", "Borrowing", "Document Delivery", "Lending", "System", and "Users". A status bar at the bottom left shows "staff/DEV 1 user".



- Client Customization – Student User

The screenshot displays the ILLiad Client 8.4.3.0 interface. The main window is titled "Searching Search Users Results - ILLiad Client 8.4.3.0". The "Users" tab is active, showing a search for "jcella". The search results table is as follows:

User Name	Last Name	First Name	SSN	Status
jcella	Cella	Jennifer		Faculty

The "jcella - User" window is open, showing the user's details. The "Delivery Methods" section is highlighted with a red box and contains the following settings:

- Notification Method: E-Mail
- Delivery Method: Hold for Pickup
- Loan Delivery Method: Hold for Pickup
- Electronic Delivery: Yes

The "Details" section shows the following information:

- User Name: jcella
- Last Name: Cella
- First Name: Jennifer
- Status: Faculty
- Department: Math
- Authorized Users: [empty]
- Expiration Date: [empty]
- Request Limit: [empty]
- ILLiad Authentication:

The "Note" section is empty.

At the bottom left, a status bar shows "student/DEV 1 user", which is also highlighted with a red box.



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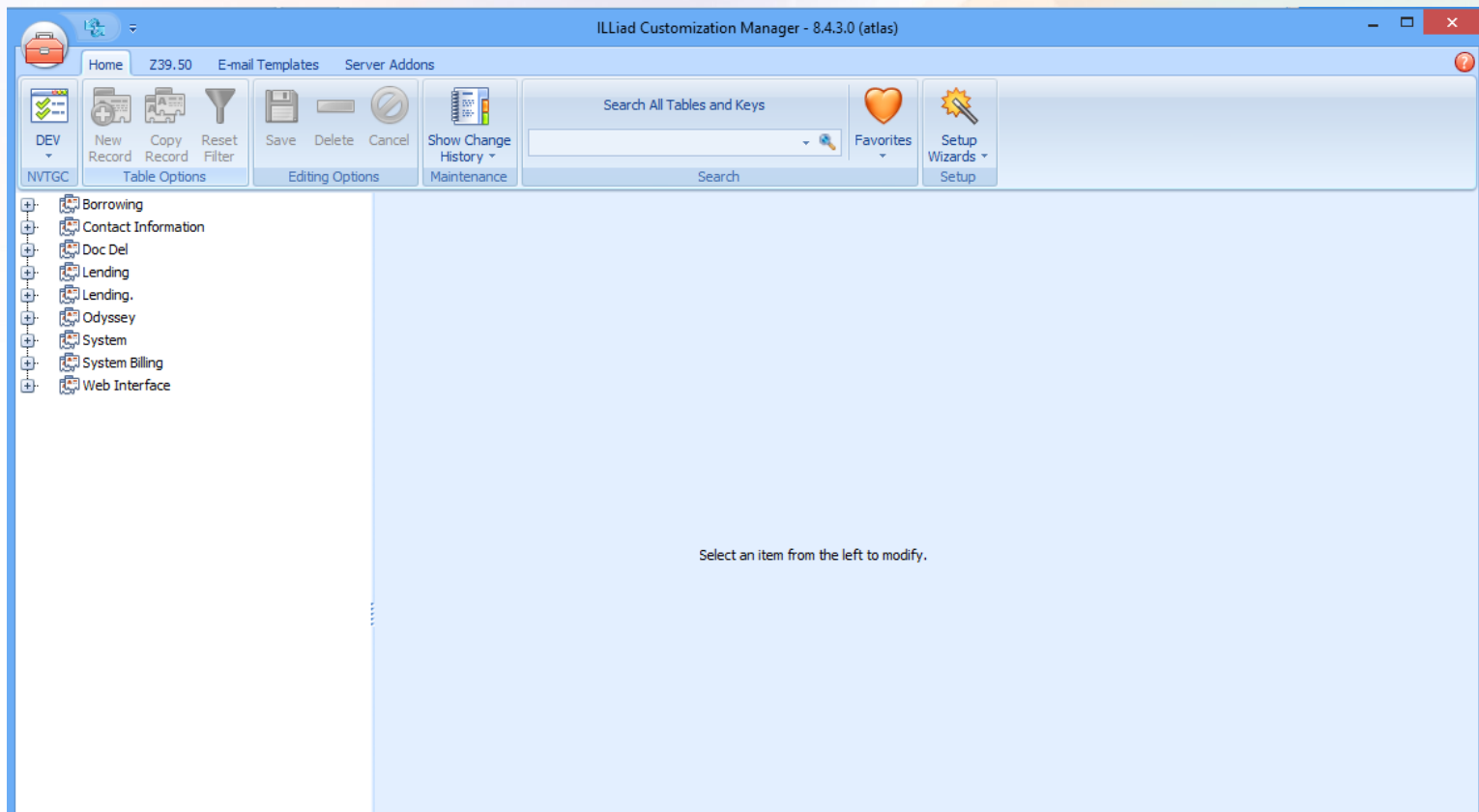
Pay No Attention to that Person Behind the Curtain:
ILLiad Administration and Defense against Flying Monkeys

The ILLiad Customization Manager

(All those buttons, wheels, and knobs behind the curtain.)



- How is the Customization Manager Accessed?
 - Installed with the latest client installer
 - Log in with your Staff Username and Password





- What controls access to ILLiad?
 - ILLiad Staff Manager

The screenshot shows the ILLiad Staff Manager 8.4.3.0 application window. The main interface includes a toolbar with icons for 'New User', 'Copy User', 'Delete User', 'Change Password', 'Save', 'Cancel', 'Copy Permissions', 'Copy Layout & Grid Settings', and 'Delete Layout & Grid Settings'. Below the toolbar is a 'Users' section with a 'Field Customizations' tab. A table lists users with columns for Username, First Name, Last Name, and NVTGC. The user 'atlas' is selected, and their details are shown in the 'User Details' pane. A 'Module Permissions' dialog box is open, listing various permissions with checkboxes. The 'Client Access' section is highlighted with a red border.

Username	First Name	Last Name	NVTGC
> atlas			ALL
odc			ALL
admin			ALL
Staff	Staff	User	ALL
Student	Student	User	DEV

Module Permissions

- Client Access
 - Can Customize Layouts?
 - OCLC Resource Sharing Settings
 - Can Manage Addons?
 - Can Logon to Web as User?
- Billing Manager - Borrowing
- Billing Manager - Document Delivery
- Billing Manager - Lending
- Customization Manager Access
- Database Manager Access
- Staff Manager Access
- Web Circulation Access
- Web Reports Access



- Who **SHOULD** have access?
 - Anyone who:
 - Needs to be able to change system settings
 - Can be trusted to know what they're doing when they make changes
 - Majority of changes are tracked
 - » Username and time/date stamp
 - » Excludes entries in tables accessible via the Customization Manager



- Where is everything?
 - Changing NVTGC for shared server
 - Commonly changed keys
 - PrintDocumentsPath
 - EMailLocation
 - WebURL
 - OCLCWebServiceV2APIKey and OCLCWebServiceV2APISecret
 - Rapid/Docline/OCLC Keys
 - Versions
 - Searching for Keys



- Things to be aware of...
 - Shared Tables (Shared Server/Multi-Site Systems)
 - CustomDropDown
 - Routing
 - System Billing
 - Editing and extra spaces
 - Beware of unwanted spaces
 - Easy to do when using copy and paste
 - ESPECIALLY important in statuses when Routing



- Things to be aware of...
- Why don't I see changes in behavior?
 - Client (Restart)
 - The Client applies most key settings, etc. at startup.
 - Always restart the client after making changes that impact Client behavior.
 - Services (Restart)
 - What requires restarting services?
 - Anything that impacts the Connection, Odyssey, or System Manager service functions.
 - » Coordinate this with whoever hosts the system (OCLC/Atlas).
 - If in doubt.....restart!



- Troubleshooting
 - Logs
 - Customization Manager
 - Controlled by CustomizationManager.log.config file
 - Enhanced (Debug) logging
 - » Set `<level value="INFO" />` to "DEBUG"
 - » Revert after troubleshooting is complete
 - Logs are written to My Documents-> ILLiad -> Logs



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Pay No Attention to that Person Behind the Curtain:
ILLiad Administration and Defense against Flying Monkeys

Email Editing

(Skywriting something other than “Surrender Dorothy”.)



- Three different Types of Email Used by ILLiad:
 - **Client Email Templates** (Text file based)
 - Text-based templates used when Emails are generated by the ILLiad Client.
 - Governed by the EMailLocation key.
 - **Server Email Templates** (Text file based)
 - Text-based templates used when Emails are generated by the ILLiad DLL or by ILLiad services running on the server.
 - If DLL-generated, Governed by DLLEMailLocation key.
 - If Odyssey-generated, Governed by the EMailLocation key from the server (acting as a Client).



- Three different Types of Email Used by ILLiad:
 - **Database Email Templates**
 - Database Email Templates, accessed through the Customization Manager.
 - Started in ILLiad 8.3.
 - Not heavily implemented yet, generally speaking, but becoming more popular.



- Server-Specific Template files:
 - Templates for any Emails Generated by the ILLiad DLL or ILLiad Services:
 - **Electronic Delivery Notifications**
 - **AutoClear**
 - **Password Reset**
 - These need to exist on the server, regardless of where your regular templates may be located.



- The EMailLocation Key:

The screenshot shows the ILLiad Customization Manager - 8.4.3.0 (atlas) interface. The left sidebar contains a tree view of various system keys, with 'EMail' expanded to show 'EMailLocation' selected. The main window displays the configuration for 'EMailLocation' under the 'Tracking' tab. The 'Settings' section shows a 'Key Value' of 'c:\illiad\email\' and a 'Description' explaining that this is the location for e-mail template text files. Below this, a table lists the key values for different sites.

Selected	NVTGC	Key Value
<input type="checkbox"/>	ADMIN	c:\illiad\email\'
<input type="checkbox"/>	DEV	c:\illiad\email\'
<input type="checkbox"/>	ILL	c:\illiad\email\'
<input type="checkbox"/>	ITS	c:\illiad\email\'
<input checked="" type="checkbox"/>	SALES	c:\illiad\email\'

At the bottom of the table, there are options to 'Select: All | None' and a button that says 'Click here to copy above value to all selected sites.'



- The DLLEMailLocation Key:

The screenshot shows the ILLiad Customization Manager interface. The left sidebar lists various system components, with 'EMail' expanded to show 'DLLEMailLocation' selected. The main panel displays the configuration for 'DLLEMailLocation' with the following details:

- Settings:**
 - Key Value:
 - Description:
- Tracking:** A table showing the key value for different sites.

Selected	NVTGC	Key Value
<input type="checkbox"/>	ADMIN	c:\illiad\email\
<input type="checkbox"/>	DEV	c:\illiad\email\
<input type="checkbox"/>	ILL	c:\illiad\email\
<input type="checkbox"/>	ITS	c:\illiad\email\
<input type="checkbox"/>	SALES	c:\illiad\email\

At the bottom of the tracking table, there is a 'Select:' dropdown with 'All' and 'None' options, and a button that says 'Click here to copy above value to all selected sites.'



- Text File Based Emails: ILLLoan.txt

```
illloan.txt - Notepad
File Edit Format View Help
Dear <#FirstName> <#LastName>

A loan that you had requested:

Loan Title: <#LoanTitle>
Loan Author: <#LoanAuthor>
TN: <#TransactionNumber>

is now available for checkout.

-----

Lending libraries sometimes restrict the use of their loans.
Any restrictions on this loan are noted below:

1) Must this item remain in the library building? <#LibraryUseOnly>
2) Is this loan renewable? <#RenewalsAllowed>

-----

Interlibrary Loan office hours are <#BorrowingHours>.

Thank you for using Interlibrary Loan and <#SystemName>.
Questions and comments regarding Interlibrary Loan policies and procedures
may be directed to <#GeneralEmailAddress>
Our office phone number is <#GeneralPhone>.
Your phone number is: <#Phone>
```



- Text File Based Emails: **Cancel.txt**

```
Cancel.txt - Notepad
File Edit Format View Help
Dear <#Firstname> <#Lastname>,

A request you have placed:

<#PhotoJournalTitle>
<#PhotoJournalVolume> <#PhotoJournalIssue> <#PhotoJournalMonth> <#PhotoJournalYear>
Title: <#PhotoArticleTitle><#LoanTitle>
Author: <#PhotoArticleAuthor><#LoanAuthor>

TN: <#TransactionNumber>

has been cancelled by the interlibrary loan staff for the following reason:

<#ReasonForCancellation>

<#LastNote>

Call Number: <#CallNumber>
Location: <#Location>

If you have a question about this cancelled item, please contact the interlibrary loan office at
<#BorrowingEmailAddress>
or
<#BorrowingPhone>
with the Transaction Number <#TransactionNumber>.

Thank you for using interlibrary loan and <#SystemName>.

Questions and comments regarding interlibrary loan policies and procedures may be directed to <#GeneralEmailAddress>.

Our office telephone number is <#GeneralPhone>.
We have your current phone contact listed as: <#Phone>
```



- Editing Text File Based Emails:

<https://prometheus.atlas-sys.com/display/illiad/Creating+and+Editing+Email+Templates>

- Tables Accessible:

- Local Info
- Transactions
- Users
- LenderAddresses

- Field Format:

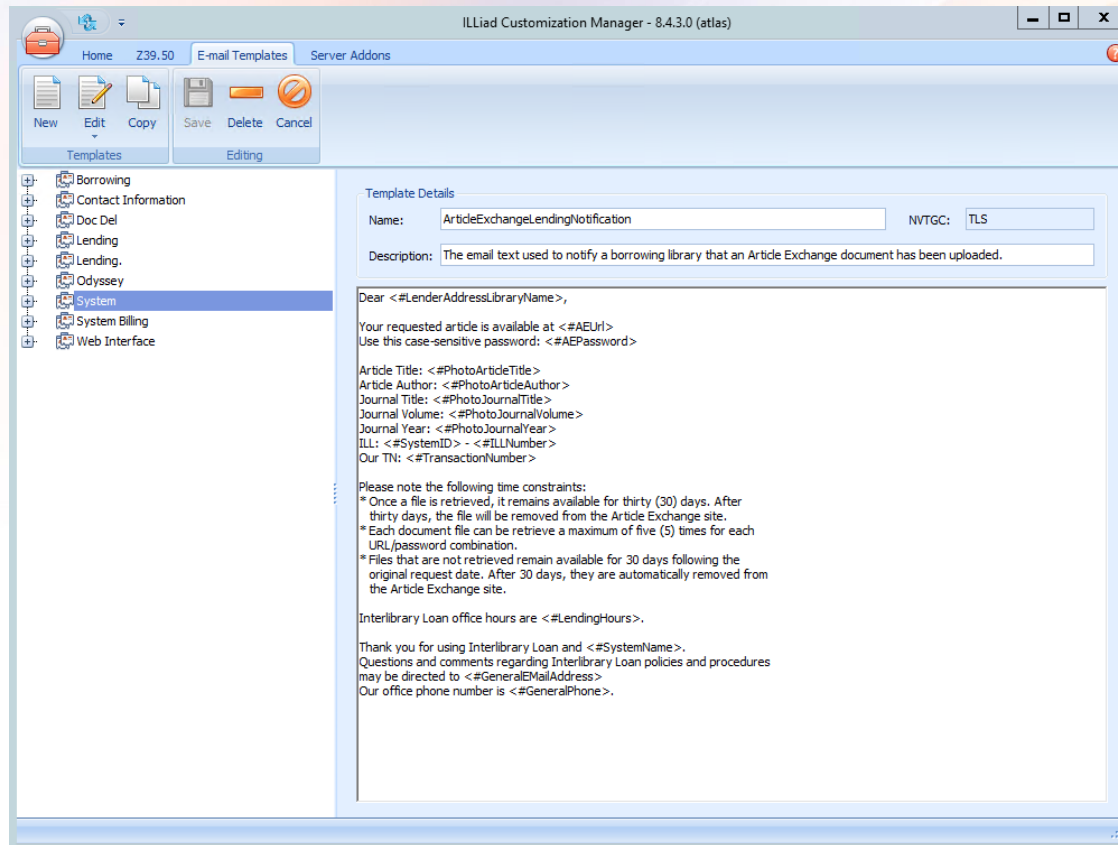
- Users/Transactions/LocalInfo Tables: **<#FieldName>**
 - Example: <#Username>
- Other Table Fields: **<#TableNameFieldName>**
 - Example: <#LenderAddressLibraryName>



- Database Emails:
 - Live in the database.
 - No file share required for access.
 - Entered/accessed via the Customization Manager.



- Database Emails:





- Creating Database Emails:

[https://prometheus.atlas-](https://prometheus.atlas-sys.com/display/illiad/Creating+and+Editing+Email+Templates#CreatingandEditingEmailTemplates-HowDatabaseTemplatesareAssociatedwithProcesses)

[sys.com/display/illiad/Creating+and+Editing+Email+Templates#CreatingandEditingEmailTemplates-HowDatabaseTemplatesareAssociatedwithProcesses](https://prometheus.atlas-sys.com/display/illiad/Creating+and+Editing+Email+Templates#CreatingandEditingEmailTemplates-HowDatabaseTemplatesareAssociatedwithProcesses)

- Naming Conventions:

- If a Customization key exists for the Email (meaning it's a standard email):

- DB Email Name = **<KEYNAME> - "EMailFileName"**

- Example: CustKey = **ILLArticleDeliveryNotifyEMailFilename**

- Database Email Name = **ILLArticleDeliveryNotify**

- Example: CustKey = **Overdue1EMailFilename**

- Database Email Name = **Overdue1**



- Creating Database Emails:
 - Naming Conventions:
 - If you're creating a DB template for an EMailRouting option (a non-standard Email):
 - Match the "file name value" of the EMailRouting Entry as set up in the EMailRouting Table.
 - Example: For an EMailRouting Option of: **Branch Pull Request** pointing at a template file name of **BranchPullRequest.txt**
 - Database Email Name = **BranchPullRequest**



- Database Emails:

The screenshot displays the ILLiad Customization Manager interface. The main window shows the 'E-mail Templates' section with a list of templates on the left and the details for the 'ArticleExchangeLendingNotification' template in the center. The template details include a name, description, and a body of text with various placeholders. A 'Local Info' dropdown menu is open, showing options like 'Transaction', 'User', 'Lender Addresses', and 'Special'. To the right of the main window, a separate window lists various system variables such as 'BillingHours', 'BorrowingAddress1', and 'GeneralContactName'.

ILLiad Customization Manager - 8.4.3.0 (atlas)

Home Z39.50 E-mail Templates Server Addons

New Edit Copy Save Delete Cancel

Templates Editing

Borrowing
Contact Information
Doc Del
Lending
Lending.
Odyssey
System
System Billing
Web Interface

Template Details

Name: ArticleExchangeLendingNotification

Description: The email text used to notify a borrowing library that an Article

Dear <#LenderAddressLibraryName>,
Your requested article is available at <#AEUrl>
Use this case-sensitive password: <#AEPassWord>

Article Title: <#PhotoArticleTitle>
Article Author: <#PhotoArticleAuthor>
Journal Title: <#PhotoJournalTitle>
Journal Volume: <#PhotoJournalVolume>
Journal Year: <#PhotoJournalYear>
ILL: <#SystemID> - <#ILLNumber>
Our TN: <#TransactionNumber>

Please note the following time constraints:
* Once a file is retrieved, it remains available for thirty days, the file will be removed from the site after that time.
* Each document file can be retrieved a maximum of 10 times using the same URL/password combination.
* Files that are not retrieved remain available for 30 days following the original request date. After 30 days, they are automatically removed from the Article Exchange site.

Interlibrary Loan office hours are <#LendingHours>.

Thank you for using Interlibrary Loan and <#SystemName>.
Questions and comments regarding Interlibrary Loan policies and procedures may be directed to <#GeneralEMailAddress>
Our office phone number is <#GeneralPhone>.

Local Info

- Transaction
- User
- Lender Addresses
- Special

BillingHours
BillingPhone
BillingState
BillingZip
BorrowingAddress1
BorrowingAddress2
BorrowingArielAddress
BorrowingCity
BorrowingContactName
BorrowingEMailAddress
BorrowingFax
BorrowingHours
BorrowingPhone
BorrowingState
BorrowingZip
DocDelAddress1
DocDelAddress2
DocDelArielAddress
DocDelCity
DocDelContactName
DocDelEMailAddress
DocDelFax
DocDelHours
DocDelPhone
DocDelState
DocDelZip
DoclineSymbol
GeneralAddress1
GeneralAddress2
GeneralCity
GeneralContactName



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Pay No Attention to that Person Behind the Curtain:
ILLiad Administration and Defense against Flying Monkeys

Routing, EMailRouting, and Custom Queues

(Where real magic lives.)

Each potentially a class in of themselves, so we're only hitting the highlights here.



- Custom Queues:
 - Allow you to create a new statuses for special purposes.
 - Once created, these appear on the Route menu in the ILLiad Client.
 - Allows Manual Routing.



- Custom Queues:

The screenshot shows the ILLiad Customization Manager interface. The title bar reads "ILLiad Customization Manager - 8.4.3.0 (atlas)". The interface includes a navigation pane on the left with categories like Borrowing, Lending, and Custom Queues. The main area displays a table of CustomQueues with columns for QueueName, ProcessType, and NVTGC. The row for "Awaiting Flying Monkey Processing" is selected. Below the table is an "Edit Row" section with input fields for the selected row's details.

QueueName	ProcessType	NVTGC
Awaiting Conditional Processing	Borrowing	TLS
Awaiting Conditional Request Processing	Lending	TLS
Awaiting Direct Request Sending	Borrowing	TLS
Awaiting Flying Monkey Processing	Lending	TLS
Awaiting ISO ILL Request Processing	Lending	TLS
Awaiting Lending Request Processing	Lending	TLS
Awaiting OCLC Sending	Borrowing	TLS

× [NVTGC] = 'TLS' Edit Filter

Edit Row

QueueName	Awaiting Flying Monkey Processing
ProcessType	Lending
NVTGC	TLS



- Custom Queues:

The screenshot shows the ILLiad system interface. A red box highlights a sub-window titled "Requests (21 items)" which lists the following request statuses and counts:

Status	Count
Awaiting Unfiled Processing	1
Awaiting Lending Request Processing	19
Awaiting Flying Monkey Processing	1

The main interface shows a "Lending Processing" window for transaction number 20. The "General Request Information" section includes:

- Transaction Number: 20
- Username: TLS
- Transaction Date: 3/17/2014 2:22 PM
- Delivery Method: Regular
- Billing Account: Z39.50

The "Article Info" section shows the title "Guns, germs, and steel ; the fates of human societies / Diamond, Jared M." and publisher "New York ; W.W. Norton & Co., c1998."

The "Notes" section contains two entries:

Date	Note	Type	Added by
11/20/2013 3:50 PM	Billing Notes; THIS IS A TEST ACCOUNT! PLEASE DO NOT FILL	System	System
11/20/2013 3:50 PM	Borrowing Notes; This is a test account. Please do NOT fill. Thank you!	System	System



- Routing/System Routing:
 - Allows Automated Condition-based routing to other statuses.
 - **Unmediated** (Once created).
 - If the transaction meets certain specified conditions, routing is automatic.
 - Triggered by status change.



- Routing/System Routing:

The screenshot shows the ILLiad Customization Manager interface. The title bar reads "ILLiad Customization Manager - 8.4.3.0 (atlas)". The interface includes a navigation pane on the left with a tree view containing categories like Borrowing, Lending, System, and Routing. The main area is titled "Routing" and contains a table with the following data:

RuleNo	RuleActive	ProcessType	TransactionStatus	MatchString
0	Yes	Borrowing	Awaiting Request Processing	t.username = 'TLS' and t.ISSN > " and t.RequestType = 'Loan' and

Below the table is an "Edit Row" section with the following fields:

RuleNo	0
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	u.NVTGC = 'TLS' and t.ISSN > " and t.RequestType = 'Loan' and (t.LendingString = " or t.LendingString is NULL)
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
RuleDescription	Default Direct Request rule



- Routing/System Routing:

RuleNo	0
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	<code>u.NVTGC = 'TLS' and t.ISSN > " and t.RequestType = 'Loan' and (t.LendingString = " or t.LendingString is NULL)</code>
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
RuleDescription	Default Direct Request rule

**u.NVTGC = 'TLS' and t.ISSN > " and
t.RequestType = 'Loan' and (t.LendingString = "
or t.LendingString is NULL)**



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- EMailRouting:
 - Allows additional Email options beyond the defaults.
 - Option to route Transactions to other statuses triggered by the sending of a specific EMail.



- EMailRouting:

The screenshot shows the ILLiad Customization Manager interface. The title bar reads "ILLiad Customization Manager - 8.4.3.0 (atlas)". The main window has a menu bar with "Home", "Z39.50", "E-mail Templates", and "Server Addons". Below the menu bar is a toolbar with icons for "New Record", "Copy Record", "Reset Filter", "Save", "Delete", "Cancel", "Show Change History", "Maintenance", "Search All Tables and Keys", "Favorites", and "Setup Wizards".

The left sidebar contains a tree view of system components, including "Borrowing", "Contact Information", "Doc Del", "Lending", "Lending.", "Odyssey", "System", "Article Exchange", "Billing", "Custom Queues", "Database Manager", "Docline", "EMail", "DLLEMailLocation", "DocDelEMailFromAddress", "DocDelEMailFromName", "EMailAuthMechanism", "EMailFromAddress", "EMailFromName", "EMailImport", "EMailImportActive", "EMailImportInterval", "EMailLocation", "EMailNoAccountAddress", "EMailNotificationSchedule", "EMailRouting", "EMailSMTPPort", "EMailSMTPServer", and "LendingDLLEMailLocation".

The main content area is titled "EMailRouting" and displays a table with the following data:

ProcessType	Name	DefaultToAddress	DefaultToName	DefaultCCAddress	DefaultSubject
Lending	Branch Pull Request	MyBranchLibrary@...	Hey Branch Folks		Please pull some stuff fo

Below the table is a filter bar showing "[NVTGC] = 'TLS'" and an "Edit Filter" button. Below the filter bar is an "Edit Row" section with a table of configuration details for the selected row:

ProcessType	Lending
Name	Branch Pull Request
DefaultToAddress	MyBranchLibrary@institution.edu
DefaultToName	Hey Branch Folks
DefaultCCAddress	
DefaultSubject	Please pull some stuff for ILL
DefaultFromAddress	MainLibrary@institution.edu
DefaultFromName	Main Library ILL
DefaultStatus	Waiting For Branch People
FileName.Loan	branchpull.txt
FileName.Article	branchpull.txt
NVTGC	TLS



- EMailRouting:

Edit Row

ProcessType	Lending
Name	Branch Pull Request
DefaultToAddress	MyBranchLibrary@institution.edu
DefaultToName	Hey Branch Folks
DefaultCCAddress	
DefaultSubject	Please pull some stuff for ILL
DefaultFromAddress	MainLibrary@institution.edu
DefaultFromName	Main Library ILL
DefaultStatus	Waiting For Branch People
FileNameLoan	branchpull.txt
FileNameArticle	branchpull.txt
NVTGC	TLS

- *Don't forget to create any Email templates you reference here.



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The ILLiad Database Manager

(Editing the Great Book of Records.)



- So what exactly is the ILLiad Database Manager?
 - A tool that allows you to delete old data from your ILLiad Database in a controlled, reasonably safe* fashion.
 - Deletes:
 - Transaction Data
 - Patron/User Data
 - Other Data (to be explained)
 - Enables Billing Manager (Turns off Test Mode).

*See Murphy's Law (and/or Ford's Corollary) for details.



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**Back up your ILLiad
Database before running
the Database Manager.**



- The Database Manager (after calculating Transactions for deletion):
- Adjust as needed:
 - Date (TransactionDate)
 - ProcessType
 - Status

Pay attention to statuses that do not belong here.

Transactions at these statuses will be ignored.

Some adjustment on the Client side may be required before running Database Manager.

The screenshot shows the ILLiad Database Manager interface with the following sections:

- Transactions** (selected tab)
- Deletion Date:** A dropdown menu set to 3/11/2011. Text below: "All requests with a transaction date prior to (not including) this date will be deleted."
- Process Types:** Checkboxes for Borrowing, Document Delivery, and Lending.
- Borrowing Summary Table:**

Transaction Status	Requests
Cancelled by ILL Staff	36,236
Checked Out to Customer	1
Not Returned Billed	29
Request Finished	87,340
123,606 Total Requests	
- Document Delivery Summary Table:**

Transaction Status	Requests
Cancelled by ILL Staff	706
Request Finished	28,188
28,894 Total Requests	
- Lending Summary Table:**

Transaction Status	Requests
Cancelled by ILL Staff	58,491
Overdues Billed	64
Request Finished	82,482
141,037 Total Requests	
- Buttons:** "Delete Transactions" at the bottom left.
- Note:** "Note: 94 of 293537 transactions are not at a finished status and will not be deleted. (i.e. Request Finished, Delivered to Web, Request Conditionalized, or Cancelled by ILL Staff)"

Red arrows point from the text "Pay attention to statuses that do not belong here." to the "Not Returned Billed" and "Overdues Billed" rows in the tables. Another red arrow points from "Transactions at these statuses will be ignored." to the "Cancelled by ILL Staff" rows in the tables.



- The Database Manager (after calculating Users for deletion):
- Adjust as needed:
 - Filter based on User data
 - Delete Vs. Block
 - Expiration Date?
 - Export Patron File?

The screenshot shows the ILLiad Database Manager interface. The 'Other' tab is selected, and the 'Task' is set to 'Delete (only users that have no transactions will be deleted)'. The search filter is set to 'AND <root>' with conditions: 'Status like Staff' and 'Cleared like DIS'. A red arrow points from the text box below to the filter area. The table below shows a list of patrons with columns for First Name, Last Name, and SSN.

First Name	Last Name	SSN
Amanda		
Angela		
Claudia		
Danielle		
Donald		
Daniel		
Karanvir		

18 Patrons

Depending on what parameters you're using for the filter, you may want to consider multiple passes through the data.

It just depends on how complicated you want to get.



- Enabling Billing Manager (Turning off Test Mode).
 - Set the initial Invoice Number.
 - Where do you want to start?
 - Set Start Dates per module.
 - How much of the old data is “real” and billable?
 - Go Live
 - Resetting Test Mode
 - IOW: Oops. I didn't meant to do that. Fix it.



- Enabling Billing Manager (Turning off Test Mode).

The screenshot shows the 'Billing Manager Mode' configuration window in the ILLiad Database Manager. The window has a title bar 'ILLiad Database Manager 8.1.0.0 (atlas/TLS)' and standard window controls. Below the title bar are four tabs: 'Transactions', 'Patrons', 'Other', and 'Billing Manager Mode'. The 'Billing Manager Mode' tab is active and contains two sections: 'Test Mode' and 'Go Live'. The 'Test Mode' section has a text box explaining that 'Reset Test Mode will remove all of the current test data. Billing Manager will remain in TEST mode.' and a 'Reset Test Mode' button. The 'Go Live' section contains four dropdown menus for 'Invoice Start Number', 'Borrowing Invoice Start Date', 'Doc Del Invoice Start Date', and 'Lending Invoice Start Date', all set to '3/10/2014'. Below these is a text box stating 'Clicking the Go Live button will set the Billing Manager to LIVE mode.' and a 'Go Live' button.

Invoice Start Number	Borrowing Invoice Start Date	Doc Del Invoice Start Date	Lending Invoice Start Date
4	3/10/2014	3/10/2014	3/10/2014



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Questions & Answers