



ILLiad

International Conference

Article Exchange: Changing the Landscape of Electronic Delivery



ILLiad
International Conference

Article Exchange

Thank you for joining me today!

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What Will We Cover Today?

- What is Article Exchange?
- What changes do I need to make in ILLiad?
- How do I send Article Exchange documents in Lending?
- How do I receive Article Exchange documents in Borrowing?



What Is Article Exchange?

- A secure document sharing site
- A cloud-based delivery option
- No charge to upload documents if you have an OCLC Resource Sharing subscription
- Documents can be accessed by anyone with a web browser and the proper password
- A great alternative for sending to sites without Odyssey



What Changes Do I Need To Make in ILLiad?

- You must be at ILLiad version 8.4
 - Article Exchange is different in 8.4 than in previous versions, no more addon
- You must have an SSL certificate on your web server
- You must request a WSKey and Secret from OCLC if you do not already have them
 - For Shared Server need WSKey and Secret for each OCLC symbol



- In the Customization Manager:
 - System/Integration/WebPlatformConfig
 - System/Web Platform/ILLiadWebPlatformConfig
 - System/OCLC/OCLCWebServiceV2APIKey
 - System/OCLC/OCLCWebServiceV2APISecret
 - System/Article Exchange
 - E-Mail Templates
- ILLiad 8.4 Documentation
 - ILLiad Configuration Guide, ILLiad Electronic Delivery



New Record Copy Record Save Delete Cancel Show Change History Maintenance

Search All Tables and Keys

Search

Favorites

Setup Wizards

Setup

- + Borrowing
- + Contact Information
- + Doc Del
- + Lending
- + **Odyssey**
- System
 - + Article Exchange
 - + Billing
 - + Custom Queues
 - + Database Manager
 - + Docline
 - + EMail
 - + General
 - + Integration
 - + ISOILLDefaults
 - + LOCL
 - + OCLC
 - + Printing
 - + Rapid
 - + Routing
 - + Versions
 - + Web Platform
- + System Billing
- + Web Interface

OdysseyHelperImagesPathLending

ILL

Settings

Key Value

c:\illiad\images\

Description

The location on the local workstation or remote share of those Lending files to be processed by Odyssey Helper.

Value Changed From	Value Changed To	Changed Time	Changed By

Double-click a tracking row to revert to the previous value.



Article Exchange in Lending

- If the article is already in electronic format you can deliver it up front without printing a slip
 - Save the article somewhere that you can get to
 - Click on Mark Found Scan Now, the scanning form will open
 - Click on Import Document and navigate to the document
 - If the borrowing site has Odyssey turned on the Send via Odyssey button will be active
 - Whether or not the borrowing site has Odyssey the Send via Article button will be active
 - Exchange button will be active
 - Article Exchange may take a minute to go through



General Request Information

Transaction Number: 27 Article Loan

Username: Lending Service Type:

Transaction Date: 10/11/2012 9:58 AM Not Wanted After: 09/19/2009

Delivery Method: Site:

Service Level: Regular Shipping Options: Mail

Billing Account: Doc Type:

OCLC Information

ILL Number: 56607513

OCLC Number: 6441787

Lending String: *TRNAA

Borrower: ORU 1

System ID: OCLC 2815

OCLC Status: Record not found

Journal Title: The New York times book review.

Volume/Issue:

Month/Year/Pages: April 20, 2008 2008 13

Article Author:

Article Title: ; Olive Kitteridge. By Elizabeth Strout

Original Journal Title:

Item Author/Publisher:

Item Place/Edition:

Accept Alternate Edition
 Accept Non English
 Allow Copies?
 Copyright Already Paid?
 Allow Renewals?
 Library Use Only?
 Replacement Pages?
 Priority Shipping
 Ariel
 Odyssey

Item Information

Call Number: 678

Location:

Due Date:

Reason For Cancellation:

Item Num/Ref Num:

ISxN: 0028-7806

Special Instructions:

Max Cost/Pieces: \$30.00IFM 1

Date	Note	Type	Added By
8/21/2009 9:27 AM	Borrowing Notes;	System	System

Citation Information

Cited In: New York, N.Y. ; New York Ti

Title:

Date:

Volume/Pages:

Home

Send via
OdysseyDisable
Trusted Sender

Process

Send via Article
Exchange

Scan

Scan &
InsertSettings
▼Import
Document

Export



Select



Pan



Zoom



Best Fit



Fit Height



Fit Width



Crop

Rotate
▼

Deskew



Undo

Delete
▼

Scanning

Image

Details

Transaction [View](#)ILL Number Journal Title Article Title Article Author Lender String System ID Symbol Library Name Address Server Note

Document





- If the article is not in electronic format

- Print the pull slip like you normally would

- Retrieve the material from the stacks

- Go to Update Stacks Search Results on the Lending Ribbon

- Click on Mark Found Scan Now, the scanning form will open

- IF the document has already been scanned in PDF format:

- Click on Import Document and navigate to the document you want to send

- Double click on document to import it

- Odyssey is usually the preferred method if available

- Whether or not the borrowing site has Odyssey the Send via Article Exchange button will be active



- IF the document has NOT already been scanned in PDF format:
 - For Odyssey enabled sites, scan the material and send via Odyssey
 - The scan will be in TIF format but the receiving Odyssey server will convert it to PDF format
 - For sites that are not Odyssey enabled, scan the material and convert the resulting TIF file to PDF format before sending via Article Exchange

DO NOT SEND TIF FILES VIA ARTICLE EXCHANGE

Transaction Number: 170
 L Number:
 Lending Information:
 Search Requests

In Stacks Searching Only Search

Mark Found Mark Found Scan Now Cancel Request Conditionalize Request

Process

Transac...	Username	Lending Lib...	Request T...	Loan Author	Loan Title	Loan Publis...	Loan Place	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...
170	Lending	PHU	Article							Agra Europ...	42	4

Details

Transaction Number	170	Due Date		Request Type	<input checked="" type="radio"/> Article	<input type="radio"/> Loan
L Number	68345658	Pieces	1			
Title	Yumm potatoes THIS IS A TEST	Item Number		Borrower Symbol	PHU	
Author		Pages	1			
Current Status	In Stacks Searching	Call Number		Library Name	Philadelphia College of Osteopathic Medicine	
Lender String	TRNAA,TRNAA,*TRNAA	Max Cost	45.00IFM			
System ID	OCLC	OCLC Status	Record not found	Odyssey Enabled		

Date	Note	Type	Added By
12/21/2014 11:15 AM	This is a test account. Please do not fill.	Lender	System
12/21/2014 11:15 AM	Received conflicting shipped message from TRNAB with no due date	System	System
09/29/2010 10:06 AM	Borrowing Notes; PALCI TCLC HSLC Thank you!	System	System



•How to convert TIF to PDF in ILLiad

- Scan the item in ILLiad like you normally would
- Export the scan as a PDF to your desktop or another location you can navigate to
 - Make sure the file is being saved as a PDF
- Import the file you have saved as a PDF
 - You will be warned that you will lose the existing pages, which is what you want to do
- Deliver the file via Article Exchange
 - Remember, you can send both TIF files and PDF files via Odyssey without any conversion
- This process will change in ILLiad 8.5

- ★ Favorites
 - Desktop
 - Downloads
 - Recent Places
- Libraries
- Computer
 - Local Disk (C:)
 - C on ARTEMIS
- Network

Libraries System Folder	John Brunswick System Folder	Computer System Folder
Network System Folder	Adobe Reader 9 Installer File folder	Ares Updates File folder
ILLiad2012 File folder	001 TIF File 2.54 MB	1 TIF File 888 KB
2 TIF File 867 KB	3 TIF File 880 KB	4 TIF File 969 KB
848 TIF File 2.42 MB	multi TIF File 272 KB	

File name:

Save as type:

- TIFF File (*.tif)
- PDF File (*.pdf)

Hide Folders

Save

Cancel



- When you send an article via Article Exchange:
 - If the other library is an OCLC library they will get an Alert
 - The Alert will show in the Notes field of the request
 - If the other library is not an OCLC library they will get an e-mail provided that the system type used is entered in the ArticleExchangeLendingEmailSystemIDs key of the Customization Manager
 - You will also need an e-mail address in the borrowing library's address, otherwise the request will go to Awaiting Article Exchange Notification



Article Exchange in Borrowing

- When another OCLC library sends you an article via Article Exchange:

- If you have ArticleExchangeTrusted set to Always in the Customization Manager AND the Lending Library sends you a properly formatted Alert in OCLC it will automatically be delivered



-If you have ArticleExchangeTrusted set to Trusted in the Customization Manager AND the Lending Library sends you a properly formatted Alert in OCLC it will automatically be delivered if the site is marked as Trusted Sender – otherwise it will go to Awaiting Odyssey Processing



- If the other library does NOT send you a properly formatted Alert on OCLC and sends you an e-mail:
 - Go to Check In From Lending Library on the Borrowing Ribbon
 - Copy and paste the URL from the e-mail into the Article Exchange URL field on the Check In From Lending Library Form
 - Copy and paste the password from the e-mail into the Article Exchange Password field on the Check In From Lending Library Form
 - Click on Check In
 - The rest of the process will be the same as if a properly formatted OCLC Alert had been sent



- If the item cannot be retrieved the request will move to **Awaiting Article Exchange Review**

- Open request, paste URL into browser, logon to Article Exchange with the password
- Save the PDF somewhere you can get to
- Move request back to Request sent, check it in, and import PDF to deliver

You may get a Connection Manager error



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Your patrons will NOT know if a request came in via Odyssey or Article Exchange, they will pick up all of their electronically delivered items by logging into their accounts



• ILLiad 8.4 Documentation

- ILLiad Configuration Guide, ILLiad Electronic Delivery
- ILLiad User Guide, Lending, OCLC Article Exchange Sending
- ILLiad User Guide, Borrowing, Processing and Circulating Requests, Processing Electronic Delivery, OCLC Article Exchange Receiving

• <http://atlas-sys.wistia.com/projects/9c84c89449>
Publicly available videos



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Questions?



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Thank You

