



# ILLiad

International Conference

## Addons 101



# **Welcome!**

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## What Will We Cover?

1. What is an addon?
2. What types of addons are there?
3. Where do I get addons from?
4. How do I configure addons?
5. How do I use addons?
6. What is possible with addons?
7. How can I have an addon written for me?



## What is an Addon?

- An addon is a feature that extends the use of the client or the system as a whole
  - Adds functionality
  - Allows for increased automation
  - Helps streamline workflow processes
- Addons are written in Lua script and stored on the local client machine
  - Server Addons are in Customization Manager
- Addon code can be modified as situations or systems change



# PLEASE NOTE

- Atlas and OCLC do not support either the default addons or user-created addons
  - Setup assistance is provided for the default Client Addons but not customization
- Contact Atlas Training and Library Solutions for a quote if you need a Custom Service Addon



# What types of addons are there?

1. Request - Appears as a tab on the request form
2. User - Appears as a tab on the user form
3. Main Form - Appears as a tab in the Main Menu
4. System - Runs in the background on the client, no user interface
5. Server - Runs in the background on the server, no user interface
  1. System Manager hosts the environment in which the addon executes
  2. Code accessible via the ILLiad Customization Manager



## Where do I get addons from?

- ILLiad comes with a number of addons preloaded
  - Amazon Search for Loans and Price Importer
  - Google Search for Loans and Article
  - Google Scholar Search for Articles
  - WorldCat Local Search
  - Atlas Training
- Additional addons can be found in the Addons Directory
  - <https://prometheus.atlas-sys.com/display/ILLiadAddons/ILLiad+Addons+Directory>
  - Some are written by Atlas, most by ILLiad users
- You can also write your own addons



## Implementing Client Addons

- Download an addon from the Addons Directory
  - Unzip it to your Addons folder - C:\Program Files\ILLiad\Addons
- To configure you must have permission in the ILLiad Staff Manager
  - Click on the Username
  - Check the “Can Manage Addons” box if not checked
  - Click “Save” in ribbon at top
  - The ability to manage addons is not the same as the ability to use addons
- Open the ILLiad Client (logging in with username just modified)
  - Go to the System Ribbon at the top of the form
  - You should see the Manage Addons icon in the Other Group





## Implementing Client Addons

- You can also download an addon to a shared drive/folder
  - Unzip the files to that location
  - Set the `AddonDirectory` Customization Key to that location
    - `AddonDirectory` may not be included by default
  - `Config.xml` file must be edited directly if you need to make changes
- When Client opens it checks the `AddonDirectory` and downloads the addon files and runs them locally.
  - Stored in `C:\Program Files\illiad\addons\`



ILLiad Staff Manager 8.3.5.0

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

Drag a column header here to group by that column

Username	First Name	Last Name	NVTGC
admin			ALL
> atlas			ALL
oclc			ALL

**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?
- 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



Main - ILLiad Client 8.3.5.0

Home Borrowing Document Delivery Lending System

Clear Users Clear WorldCat Search OCLC Search/Review Statuses Policies Directory Resource Sharing Settings OCLC Web Logon Web Reports Web Alerts Web Atlas Systems Community Portal OCLC ILLiad Web Event Log Groups Maintenance Addons Other

Main Training

Borrowing Document Delivery Lending

Requests (162 items)

- Awaiting Borrowing Scanning 5
- Awaiting Conditional Processing 1
- Awaiting Doc Provider Processing 2
- Awaiting Post Receipt Processing 1
- Awaiting Request Processing 4
- Awaiting Return Label Printing 2
- Awaiting Unfilled Processing 43
- Cancelled by ILL Staff 39
- Checked Out to Customer 11
- Delivered to Web 3
- In Electronic Delivery Processing 2
- Request Finished 34
- Request Sent 3
- Customer Notified via Mail 2
- Customer Notified via Phone 2
- Awaiting Stacks Searching 3
- Awaiting RAPID Request Sending 2
- Awaiting Fred Custom Queue 1
- Awaiting Fred 1

162

Barometer

Category	Count
Borrowing	68
Document Delivery	2
Lending	645

System

Alert	B	D	L
Connection Manager	19	0	45
Odyssey Manager	0	0	2
Outgoing E-Mail	99	0	41
Flagged Requests	30	0	0
Users To Clear	0	0	0

148 0 88

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- On the ribbon you will see:
  - Reset Cache – searches for the latest version of the addons at the remote location defined by the AddonDirectory key and/or reads in the current local copy of the addon
  - Save Settings – saves your changes
  - Reset Settings – setting revert back to default
  - Create Connection File – configures a SQL or OLE DB connection
- In the middle you will see:
  - A list of the addons that are present on the local client
- At the bottom you will see:
  - The configuration options of the addon in the list that is highlighted



Manage Addons

Home

Reset Cache Options

Save Settings

Reset Settings

Create Connection File

Add-on Settings

Name	Author	Version	Active	Description
Amazon Book Searches	Atlas Systems, Inc.	1.1	<input type="checkbox"/>	Performs an Amazon search for the LoanTitle for loans.
Google Scholar Search	Atlas Systems, Inc.	1.1	<input type="checkbox"/>	Performs a Google Scholar search for the PhotoArticleTitle for articles.
Google Search	Atlas Systems, Inc.	1.1	<input checked="" type="checkbox"/>	Performs a generic Google search for the LoanTitle for loans and the PhotoArticleTitle for articles.
OCLC Article Exchange	Atlas Systems, Inc.	1.5	<input checked="" type="checkbox"/>	Opens OCLC Article Exchange
Serials Solutions Citation...	IDS Project	2.9	<input checked="" type="checkbox"/>	Does a full Serials Solution Citation search for an article and processes the ILL licensing data through the ALIAS API and also performs a price lookup of the article using the CCC GetItNow Service.
Shipment Tracking	Atlas Systems, Inc.	1.1	<input type="checkbox"/>	Displays tracking information based on a given tracking number
Training	Atlas Systems, Inc.	1.1	<input checked="" type="checkbox"/>	Loads the Atlas Systems Training site into a tab on the main form.
WorldCat Local Search	Atlas Systems, Inc.	1.1	<input type="checkbox"/>	Performs a WorldCat search using a requests title, isxn or oclc number.

Name:

Author:

Version:

Active:  Yes  No

Description:

Setting Name	Value	Type	Description
AutoCopyToClipboard	<input checked="" type="checkbox"/>	bool...	Determines if the URL, Username, and Password are copied to the clipboard upon successful drop.
AutoImportIntoTrans...	<input checked="" type="checkbox"/>	bool...	Determines if the URL, Username, and Password are imported into the transaction record upon successful drop.
AutoImportUrlField	CallNu...	string	Determines the transaction field into which to import the URL if AutoImportIntoTransaction is enabled.
AutoImportPassword...	Location	string	Determines the transaction field into which to import the Password if AutoImportIntoTransaction is enabled.



# ILLiad

Innovative



File Home Share View



Computer > Local Disk (C:) > Program Files (x86) > ILLiad > Addons > Innovative

Search Innovative

- ★ Favorites
- Desktop
- Downloads
- Recent places

Name	Date modified	Type	Size
Config	7/3/2013 10:40 AM	XML File	2 KB
Innovative	12/19/2012 7:20 PM	LUA File	18 KB
layout	6/14/2012 9:00 AM	XML File	11 KB

- Libraries
- Documents
- Music
- Pictures
- Videos

- Computer
- Local Disk (C:)
- Temporary Storage
- A on BOREASVM
- C on BOREASVM
- D on BOREASVM
- E on BOREASVM

Network

3 items





```
Config - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8"?>
<Configuration xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <Name>CWRU Innovative</Name>
  <Author>Atlas Systems</Author>
  <Version>1.0</Version>
  <Active>False</Active>
  <Type>Addon</Type>
  <Description>CWRU Innovative Catalog</Description>
  <Forms>
    <Form>FormRequest</Form>
  </Forms>
  <Settings>
    <Setting name="AutoSearch" value="true" type="boolean">
      <Description>Determines whether or not the search should be done automatically when the request is opened.</Description>
    </Setting>
    <Setting name="UseOCLCNumber" value="true" type="boolean">
      <Description>Determines whether or not the search should use the OCLC Number or just ISSN/ISBN and Title.</Description>
    </Setting>
    <Setting name="Catalog_URL" value="http://catalog.case.edu/" type="string">
      <Description>Catalog URL</Description>
    </Setting>
  </Settings>
  <Files>
    <File>Innovative.lua</File>
  </Files>
</Configuration>
```



File Edit Format View Help

```
-- Hide the text label
InnovativeSearchForm.Browser.TextVisible = false;

InnovativeSearchForm.Browser.WebBrowser.ScriptErrorsSuppressed = true;

-- Since we didn't create a ribbon explicitly before creating our browser, it will have created one using the name we passed the CreateBrowser method. We
InnovativeSearchForm.RibbonPage = InnovativeSearchForm.Form:GetRibbonPage("Innovative Search");

-- Create the search button(s)
InnovativeSearchForm.RibbonPage:CreateButton("OCLC #", GetClientImage("Search32"), "Search", "Search Catalog");
InnovativeSearchForm.RibbonPage:CreateButton("ISxN", GetClientImage("Search32"), "SearchISxN", "Search Catalog");
InnovativeSearchForm.RibbonPage:CreateButton("Title", GetClientImage("Search32"), "SearchTitle", "Search Catalog");
InnovativeSearchForm.RibbonPage:CreateButton("Author", GetClientImage("Search32"), "SearchAuthor", "Search Catalog");
--InnovativeSearchForm.RibbonPage:CreateButton("Import Info", GetClientImage("ImportData32"), "ImportInfo", "Import");

--Build the "Request" MemoEdit Box
Request = InnovativeSearchForm.Form:CreateMemoEdit("Request", "ILLiad Citation");

--Fill in the Fields in the "Request MemoEdit box"
local MemoString = "";

if GetFieldValue("Transaction", "RequestType") == "Loan" and GetFieldValue("Transaction", "LoanTitle") ~= "" then
    MemoString = "TITLE: " .. GetFieldValue("Transaction", "LoanTitle") .. " ";
elseif GetFieldValue("Transaction", "PhotoJournalTitle") ~= "" then
    MemoString = "JOURNAL TITLE: " .. GetFieldValue("Transaction", "PhotoJournalTitle") .. " ";
end

if GetFieldValue("Transaction", "PhotoArticleTitle") ~= "" then
    MemoString = (MemoString .. "ARTICLE TITLE: " .. GetFieldValue("Transaction", "PhotoArticleTitle") .. " \r\n");
end

if GetFieldValue("Transaction", "RequestType") == "Loan" and GetFieldValue("Transaction", "LoanAuthor") ~= "" then
    MemoString = (MemoString .. "AUTHOR: " .. GetFieldValue("Transaction", "LoanAuthor") .. " \r\n");
end

if GetFieldValue("Transaction", "PhotoJournalVolume") ~= "" then
    MemoString = (MemoString .. "VOLUME: " .. GetFieldValue("Transaction", "PhotoJournalVolume") .. " ");
end
```



Home Z39.50 E-mail Templates Server Addons



Select Addon ▾ New Save Delete Cancel

Manage

- [-] Borrowing
- [-] Contact Information
- [-] Doc Del
- [-] Lending
- [-] Odyssey
- [-] System
  - [+] Article Exchange
  - [+] Billing
  - [+] Custom Queues
  - [+] Database Manager
  - [+] Docline
  - [+] EMail
  - [+] General
  - [+] Integration
    - [-] ExternalFieldMapping
    - [+] WebPlatformConfig

- [-] ILLiadWebPlatformConfig
- [-] VersionWebPlatform
- [-] WebPlatformConfig

Name Electronic Delivery Reminder

Code Configuration

```

<Configuration>
<Name>Electronic Delivery Reminder Addon</Name>
<Author>Atlas Systems, Inc.</Author>
<Version>1.0</Version>
<Active>>false</Active>
<Type>Server</Type>

<Description>Send another Notification Email for electronic files (PDF) not viewed</Description>

<Settings>
  <Setting name='EmailName' value='ElecDel Reminder' type='string'>
    <Description>Name of the Email template to use.</Description>
  </Setting>
  <Setting name='Days' value='5' type='string'>
    <Description>Days before file will be removed from Delivered to Web status that Reminders should begin sending.</Description>
  </Setting>
  <Setting name='EmailSubject' value='Reminder of Item Delivered to view Online' type='string'>
    <Description>E-Mail Subject line on Notification Reminder.</Description>
  </Setting>
  <Setting name='Site' value='XYZ' type='string'>
    <Description>Site code value that addon should run under, only used if SharedServerSupport is "Yes".</Description>
  </Setting>
</Settings>

<Forms/>
<Files/>
</Configuration>

```

Select Addon New Save Delete Cancel  
Manage

- + Borrowing
- + Contact Information
- + Doc Del
- + Lending
- + Odyssey
- + System
- + Article Exchange
- + Billing
- + Custom Queues
- + Database Manager
- + Docline
- + EMail
- + General
- + Integration
  - ExternalFieldMapping
  - WebPlatformConfig**

- ILLiadWebPlatformConfig
- VersionWebPlatform
- WebPlatformConfig

Name **Electronic Delivery Reminder**

Code **Configuration**

```

local Settings = {};
Settings.EmailName = GetSetting("EmailName");
Settings.Days = GetSetting("Days");
Settings.EmailSubject = GetSetting("EmailSubject");
Settings.Site = GetSetting("Site");

function Init()
    ExecuteCommand("WriteSystemLog", "Initializing Electronic Delivery Reminder addon.");
    RegisterSystemEventHandler("SystemTimerElapsed", "TimerElapsed");
end

function TimerElapsed(eventArgs)
    SendEmails();
end

function SharedServerSupport()
    local connection = CreateManagedDatabaseConnection();
    connection.QueryString = "SELECT Value FROM Customization WHERE CustKey = 'SharedServerSupport' AND NVTGC = 'ILL'";
    connection.Connect();

    local value = connection:ExecuteScalar();

    connection:Disconnect();

    if (value == "Yes") then
        LogDebug("Shared Server Support enabled");
        sharedServerSupport = true;
    else
        LogDebug("Shared Server Support not enabled");
        sharedServerSupport = false;
    end
end

function SendEmails()
    local usersTable = "Users";

```



523 - Borrowing Request

System Script

Borrowing Processing OCLC Google Search

Back Forward Stop Refresh Search

Browser Google

Detail History OCLC Z39.50 PubMed/Docline Google Search OCLC AE Powells Innovative Search

+You Search Images Maps Play YouTube News Gmail Drive Calendar More

Google

Gone with the wind /

Web Images Maps Shopping News More Search tools

About 164,000,000 results (0.40 seconds)

**Gone with the Wind (1939) - IMDb**  
[www.imdb.com/title/tt0031381/](http://www.imdb.com/title/tt0031381/)  
★★★★★ Rating: 8.2/10 - 132582 votes  
Scarlett is a woman who can deal with a nation at war, Atlanta burning, the Union Army carrying off everything from her beloved Tara, the carpetbaggers...  
Directed by [Victor Fleming](#). Starring [Thomas Mitchell](#), [Thomas Mitchell](#).  
[Full cast and - Trivia - Memorable quotes - Vivien Leigh](#)

**Gone with the Wind (film) - Wikipedia, the free encyclopedia**  
[en.wikipedia.org/wiki/Gone\\_with\\_the\\_Wind\\_\(film\)](http://en.wikipedia.org/wiki/Gone_with_the_Wind_(film))  
**Gone with the Wind** is a 1939 American epic historical romance film adapted from Margaret Mitchell's Pulitzer-winning 1936 novel and produced by David O.  
[Hattie McDaniel](#) - [Leslie Howard](#) - [Butterfly McQueen](#)

**Gone with the Wind - Wikipedia, the free encyclopedia**  
[en.wikipedia.org/wiki/Gone\\_with\\_the\\_Wind](http://en.wikipedia.org/wiki/Gone_with_the_Wind)  
**Gone with the Wind** is a novel written by Margaret Mitchell, first published in 1936 . It is often placed in the literary sub-genre of the historical romance novel.

Shop for **Gone wi...** on Google

**Gone with the (1939)**  
\$2.99 - [Walmart](#)  
Free shipping on \$45+ order

**Gone With The (Special Edition Frame)**  
\$19.96 - [Walmart](#)  
Free shipping on \$45+ order

See more shopping results on Google



The screenshot shows a web browser window with the following elements:

- Browser Title Bar:** Training - ILLiad Client 8.3.5.0
- Navigation Bar:** Home, Borrowing, Document Delivery, Lending, System, Training
- Browser Controls:** Back, Forward, Stop, Refresh buttons.
- Page Header:** ATLAS SYSTEMS Library Excellence Through Efficiency
- Navigation Menu:** PRODUCTS AND SERVICES | ILLIAD CONFERENCE | TRAINING | DOCUMENTATION | SUPPORT | DEVGINEERS | ABOUT
- Main Content:**
  - ## Atlas Systems Training
  - ### Upcoming Class Schedule
  - See a class you want to attend? Please log in to enroll.
  - 1. Log in to your Atlas Systems account. If you don't have an account you can quickly create one.
    2. Select the class or classes you wish to enroll in and click on Enroll.
    3. Register one staff member if you will attend as a group in a meeting room with speakerphone and projector (reserves one WebEx seat)
    4. Register each person if staff plan to attend individually from their own computers (reserves individual WebEx seats)
- Right Sidebar:**
  - Welcome fred funk
  - My Subscriptions
  - My Classes
  - Upcoming Classes
  - Video Library
  - Change Profile
  - Change Password
  - Logout



## Some Addon Capabilities

- Link to a Catalog to Search and retrieve holdings information
  - Can be done via the web Interface or an API/webservice
- Connect to the ILLiad database or external databases to retrieve (possibly update information, dependent on permission).
- Route requests based on criteria that is more complex than normal routing.
  - Useful if matchstring length is limiting factor.
  - More SQL Tables can be accessed for building routing logic.
  - Routing based on “how long item has sat in a queue” possible with the Server addon.



## Some Addon Capabilities

- Send automated emails to patrons based on status of request or other trigger.
  - Send secondary notification emails for items not picked up/viewed online
- Add a request note (server addons)
- Add a record to the ESPUpdate table (server addons)
- Add an entry to the Request History (server addons)\*
- Any combination of sending email/routing/updating request records to automate workflows can be incorporated into an addon.

\*on enhancement list



- Item, User, and Main Form addons usually require staff intervention to start the process
  - Addon tabs can be hidden when it would not be appropriate to use on certain items or users.
- System addons would start based on some action of the client user.
  - Opening a request could “retrieve” some value from an external system
  - Useful when only one result is returned.
- Server addons run based on a timer and execute, when appropriate, automatically.

- NISO Circulation Interchange Protocol (NCIP)
  - An interface between ILS/Circulation systems and outside systems
  - Uses services and messages to update or retrieve information from the ILS
- Before an addon can be written (by Atlas):
  - NCIP webservice must be in place on ILS/Circulation to allow Addon to communicate.
    - This might require additional installation and expense from your ILS vendor.
  - The ability to develop against your NCIP server
  - Your NCIP responder URL
  - An account we can use for testing
  - A few items that we can test against
  - A contact who can assist us in testing and troubleshooting
  - Access to your OPAC vendor NCIP documentation
  - Authentication credentials to be used for each catalog interaction (if required by your NCIP software)
  - Specific Agency IDs (if required by your NCIP software to identify who the NCIP messages are to and from)





## Custom Addons

- Atlas can create addons based on your specifications
  - We will work with you to identify requirements and cost
  - Contact Atlas Training and Library Solutions at [service@atlas-sys.com](mailto:service@atlas-sys.com)
  - Addons are delivered with a 30 day Support/Testing period



## For More Information

### ILLiad Addon Documentation

- <https://prometheus.atlas-sys.com/display/ILLiadAddons/Addons+Home+Page>

### Atlas Technical Information on Addons

- <https://prometheus.atlas-sys.com/display/ILLiadAddons/ILLiad+Addon+Technical+Overview>

### Lua Script Information

- <http://www.lua.org/>



# Questions?

**Thank You**

