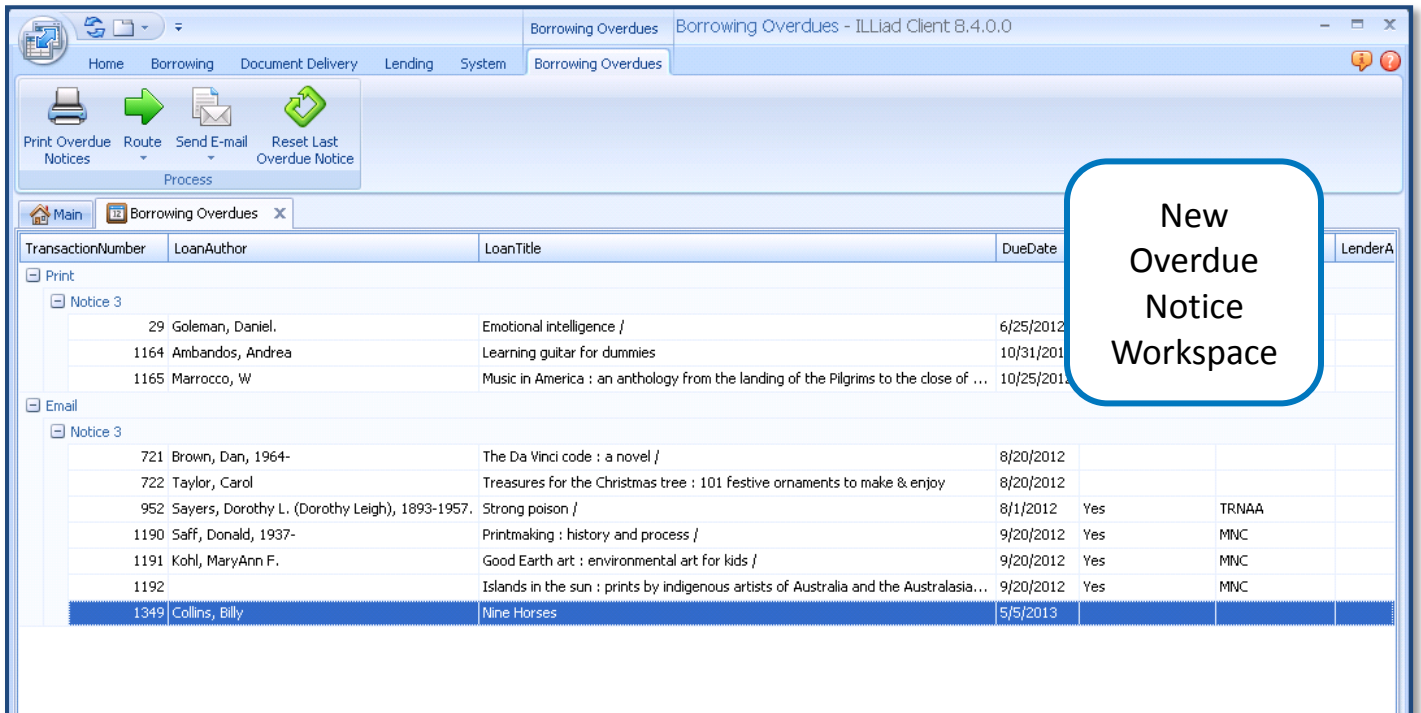


Agenda

- Overdue Notifications
- Article Exchange Integration
- Fifteen Symbol Lender String
- Log on to Web as Patron
- Field Customization Options
- Searching Options and Performance
- Other
 - ILLiad-Aeon Integration
 - Options Form
 - Improved CCC Report Error Processing

Overdue Notifications

- New Overdue Display on Ribbons
- Additional reminder/courtesy notice
- Customizable, manual overdue notices
 - Can resend previous notice
 - Can route
 - Can send custom notice with email routing



TransactionNumber	LoanAuthor	LoanTitle	DueDate	LenderA
Print				
Notice 3				
29	Goleman, Daniel.	Emotional intelligence /	6/25/2012	
1164	Ambandos, Andrea	Learning guitar for dummies	10/31/201	
1165	Marrocco, W	Music in America : an anthology from the landing of the Pilgrims to the close of ...	10/25/201	
Email				
Notice 3				
721	Brown, Dan, 1964-	The Da Vinci code : a novel /	8/20/2012	
722	Taylor, Carol	Treasures for the Christmas tree : 101 festive ornaments to make & enjoy	8/20/2012	
952	Sayers, Dorothy L. (Dorothy Leigh), 1893-1957.	Strong poison /	8/1/2012	Yes TRNAA
1190	Saff, Donald, 1937-	Printmaking : history and process /	9/20/2012	Yes MNC
1191	Kohl, MaryAnn F.	Good Earth art : environmental art for kids /	9/20/2012	Yes MNC
1192		Islands in the sun : prints by indigenous artists of Australia and the Australasia...	9/20/2012	Yes MNC
1349	Collins, Billy	Nine Horses	5/5/2013	

- New Keys and templates for Reminder Notice
 - Borrowing | Overdues
 - BorrowingReminderDaysBeforeDueDate
 - BorrowingReminderEMailSubject
 - BorrowingReminderDocs
 - Lending | Overdues
 - LendingReminderDaysBeforeDueDate
 - LendingReminderDaysEMailSubject
 - LendingReminderDocs
- Will work as previously unless Reminder Notice values are added
- Renamed Email Templates
 - Overdue1 → Borrowing Overdue1
 - Overdue2 → Borrowing Overdue2
 - Overdue3 → Borrowing Overdue3
- New Email Templates
 - BorrowingOverdueReminder
 - LendingOverdueReminder

Article Exchange (AE) Integration

Borrowing

- Workflow: Two Scenarios
 - Alert field info—i.e. from another ILLiad or OCLC library
 - No warning in Connection Manager
 - Processed as Odyssey item
 - Trusted sender = Always → Delivered to Web
 - Trusted sender = Trusted, Never → Awaiting Odyssey Processing
 - Received via email
 - Manual addition at Check In from Lending Library
 - Add both URL and password
 - Warning if both not provided
 - Use Check In option
 - Processed as Odyssey item
- New Statuses
 - **Awaiting Article Exchange Retrieval**
 - Temporary status that system will update
 - **Awaiting Article Exchange Review**
 - Error status if ILLiad cannot access the AE Service or not .pdf or .tiff file type
- Will only handle .tif or .pdf file types
 - **Awaiting Article Exchange Review** if not
- Trusted sender
 - Associated keys in Customization Manager
 - System | Article Exchange | ArticleExchangeTrusted
 - Always, Trusted, Never
 - Same Trusted value in Lender Address record is used for both Odyssey and Article Exchange
- Overrides Trusted Sender if
 - Billing not exempt or user prefers print delivery

Borrowing AE via Email

Transaction Number: 36
 ILL Number: [blank]
 Citation Information: [blank]

Check In From Lending Library

Transaction...	Username	Request T...	Loan Author	Loan Title	Loan Publi...	Issue	Loan Date	Loan Edition	Photo Jour...	Photo Jour...	Photo Jour...	Photo Jour...
36	sspires	Article							Whole Dog ...	14	5	May

Check In From Lending Library

Transaction Number: 36
 ILL Number: [blank]
 Customer Name: Stephanie Spires (Staff)
 Delivery Location: TLS
 Electronic Delivery?
 Accept Non English?
 Accept Alternate Edition?
 Title: Dogs and you
 Author: [blank]
 Volume: 14 Year: 2002

Article Exchange URL: <http://oc.lc/112y5m>
 Article Exchange Password: v7yziypC
 Inclusive Pages: 12-13

Due Date: [blank]
 Document Type: [blank]
 Number of Pieces: 1 Number of Pages: 1
 Notes/Special Ins.: [blank]
 OCLC Status: [blank]

Borrowing AE via OCLC Alert

Borrowing Processing OCLC

Cancel Request * Renew Request * Send Delivery Notification * Process
 Route * Route To Document Delivery * Routing
 Remove Payment * Order Status * Copyright
 Gateway Search * Polices Directory * OCLC * Billing * User * Add to Print Queue * Print and Empty Queue * Pending Updates * Import into Resubmission * System

Detail History OCLC Z39.50 PubMed/Dodine

General Request Information

Transaction Number: 37
 Username: jbrunswick
 Transaction Date: 5/24/2013 3:53 PM
 Delivery Method: Mail to Address
 Service Level: Regular
 Billing Account: [blank]

OCLC Information

ILL Number: 104979331
 OCLC Number: 1782154
 Lending String: *TRNAA,TRNAA,TRNAA
 Item ID: [blank]
 Status: SHIPPED 20130524

Article Info

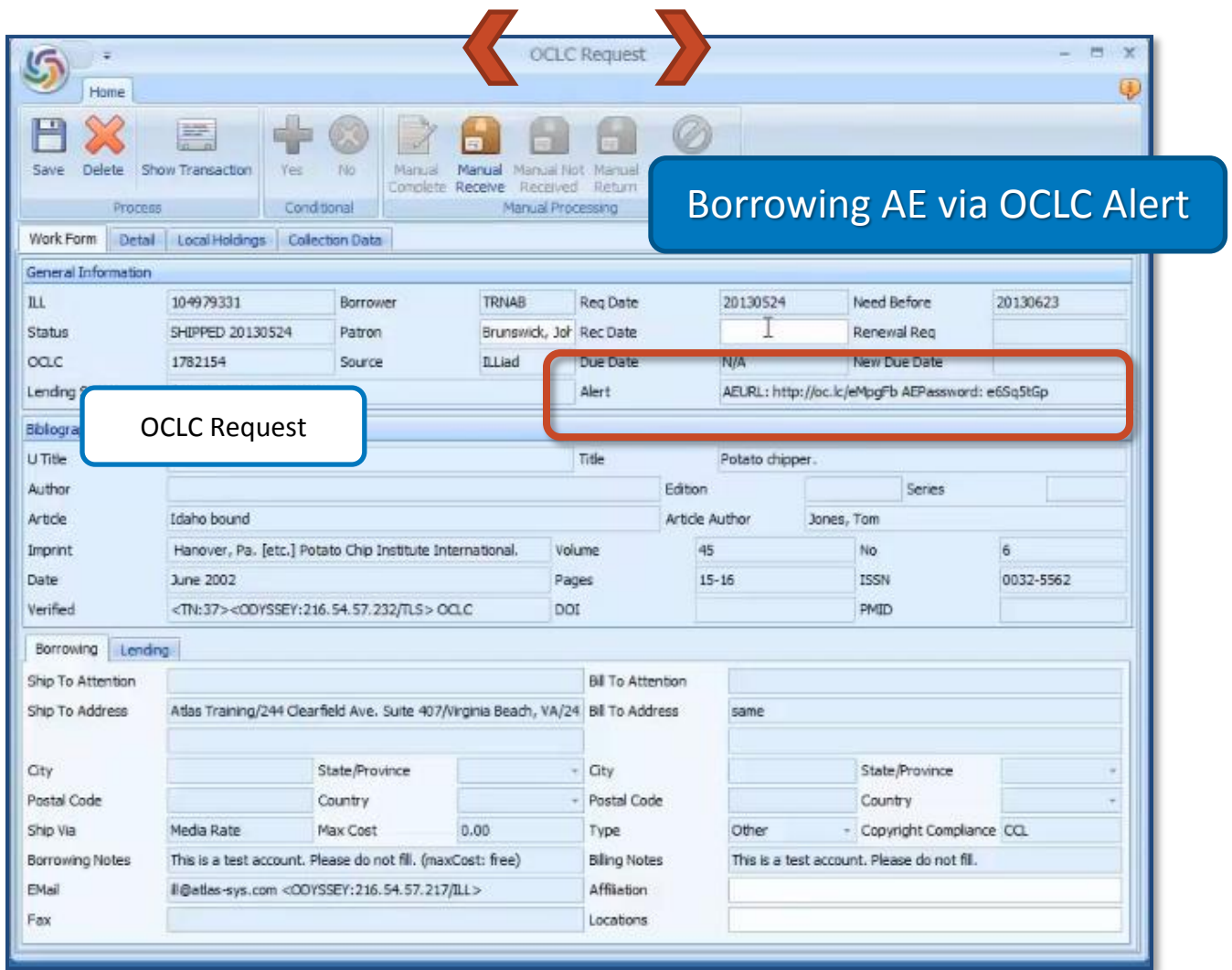
Journal Title: Potato chipper.
 Volume/Issue: 45 6
 Month/Year/Pages: June 2002 15-16
 Article Author: Jones, Tom
 Article Title: Idaho bound
 Original Journal Title: Potato Chipper
 Item Author/Publisher: [blank]
 Item Place/Edition: [blank]

Item Information

Call Number: [blank]
 Location: [blank]
 Due Date: [blank]
 Reason For Cancellation: [blank]
 Item Num/Ref Num: [blank]
 ISxN: [blank]
 Special Instructions: [blank]
 Max Cost/Pieces: [blank]

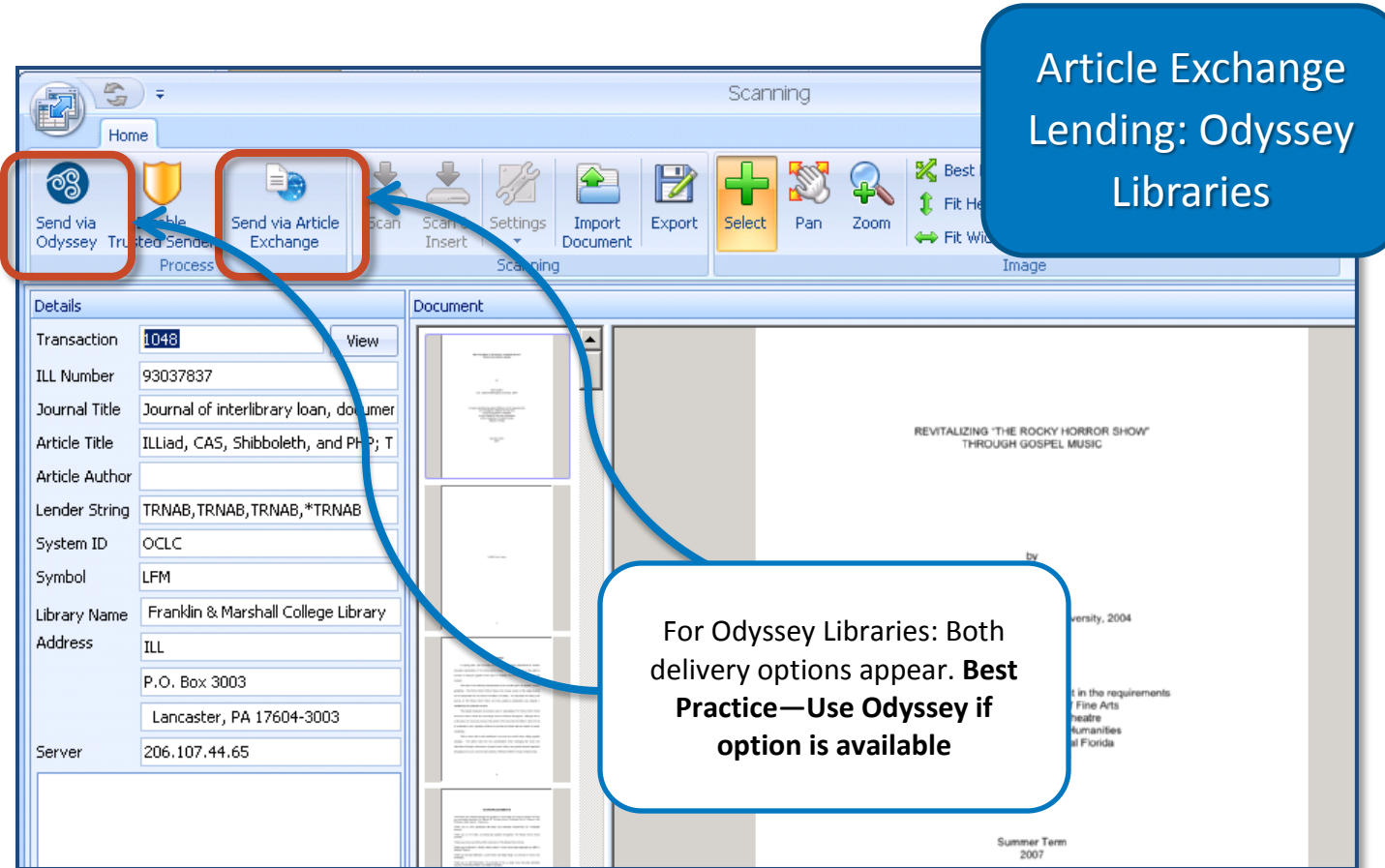
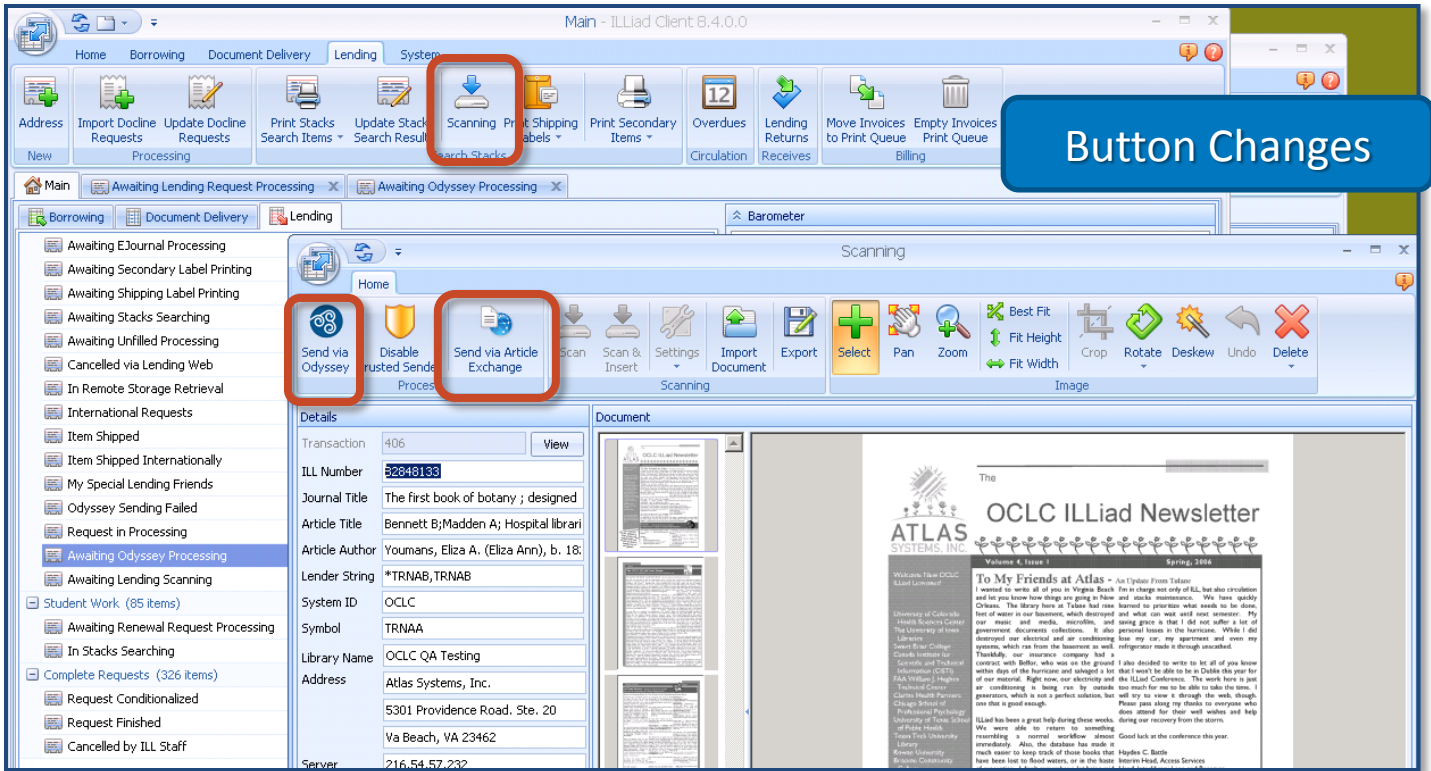
Date	Note	Type	Added By
5/24/2013 3:53 PM	This is a test account. Please do not fill. Thank you!	Lender	System
5/24/2013 3:53 PM	Article Exchange URL: http://oc.lc/1eMpgFb Article Exchange Password: e65q5tGp	Lender	System

Awaiting Article Exchange Retrieval User Not Cleared



Lending

- Changes to **Mark Found Scan Now**
 - Scanning workform has options to send via Odyssey or Article Exchange depending upon the requesting library's use of Odyssey
 - AE info added to **Alert** field if OCLC request or **Note** field if not an OCLC request
 - If not an OCLC request, ILLiad sends email to **BorrowingDepartmentEmail** in Lender Address Record
 - Can override electronic delivery if need be
- New statuses
 - **Awaiting Lending Scanning** replaces **Awaiting Odyssey Scanning**
 - **Awaiting Article Exchange Notification** queue
 - Error status
 - Not an OCLC request and lacks Borrowing Department email address in the Lender Address Record
- Button changes
 - **Scanning** replaces **Odyssey Scanning** button on Lending Ribbon
 - **Import Document** replaces **Import PDF** and **Import Image** buttons on Scanning window



Article Exchange Lending: OCLC Libraries without Odyssey

Transaction 1520
 ILL Number 104550863
 Journal Title Team of rivals ; the political genius c
 Article Title Chapter 4
 Article Author
 Lender String TRNAB,TRNAB
 System ID OCLC
 Symbol TRNAA
 Library Name Atlas Training
 Address 244 Clearfield Ave. Suite 407
 Virginia Beach, VA
 24362
 Server 216.54.57.232

For OCLC Libraries without Odyssey: Only **Send via Article Exchange** available

ILL 104618329 Borrower HCD Req Date 20130516 Need Before 20130615
 Status SHIPPED 20130524 Patron Brunswick, Jo Rec Date
 OCLC 1782154 Source ILLiad
 Lending String TRNAA,*TRNAA,TRNAA
 Alert AEURL: http://oc.lc/gRk41 AEPassword: MDGv'svb6

U Title Title Potato chipper.
 Author Edition Any Series
 Article why I like chips Article Author tony melvyn
 Imprint Hanover, Pa. [etc.] Potato Chip Institute International. Volume 7 No 7
 Date July 2007 Pages 7-eoa ISSN 0032-5562
 Verified <TN:4352><ODYSSEY:206.107.44.153/HCD> OCLC DOI PMID

Ship To Attention College of the Holy Cross/ILL-Dinand Library/1 College Street/Wor
 Ship To Address
 City State/Province City State/Province
 Postal Code Country Postal Code Country
 Ship Via Library Mail Max Cost 0.00 Type Other Copyright Compliance OCL
 Borrowing Notes We prefer delivery via email to libill@holycross.edu. THANK YOU. Billing Notes Reciprocal Members - NO\$\$,ARC,A3CU,LVIS
 EMail libill@holycross.edu Affiliation LVIS, NE@R, NEPU, PASU,ULWU,NEUL,NO\$\$,A3CU
 Fax 508-793-2372 Locations

ILLiad adds Article Exchange delivery information to the **Alert** field in the OCLC request for OCLC libraries without Odyssey

Scanning

Home

Send via Odyssey | Disable Trusted Sender | **Send via Article Exchange** | Scan | Scan & Insert | Settings | Import Document | Export | Select | Pan | Zoom | Best Fit | Fit Height | Fit Width | Crop

Details

Transaction: 1520 [View]

ILL Number: 104550863

Journal Title: Team of rivals ; the political genius c

Article Title: Chapter 4

Article Author:

Lender String: TRNAB,TRNAB

System ID: OCLC

Symbol: TRNAA

Library Name: Atlas Training

Address: 244 Clearfield Ave. Suite 407
Virginia Beach, VA
24362

Server: 216.54.57.232

Document

REVITALIZING "THE ROCKY HORROR SHOW" THROUGH GOSPEL MUSIC

KIP
B.A. Central Wash

A thesis submitted in partial fulfillment in the requirements for the degree of Master of Fine Arts in the Department of Theatre in the College of Arts and Humanities at the University of Central Florida Orlando, Florida

Summer Term 2007

Article Exchange Lending: Non-OCLC Libraries

For non-OCLC Libraries: Only Send via Article Exchange available

35 - Lending Request

Lending Processing

Cancel Request | Conditionalize Request | Mark Found | Mark Found Scan Now | Route | Policies Directory | Resend Request | Billing | View | Send E-Mail | Print Request | Add to Print Queue | Pending

Detail | History | OCLC | Z39.50 | PubMed/Docline

General Request Information

Transaction Number: 35 | Article | Loan

Username: DEV | Service Type: | Not Wanted After: 05/24/2014

Transaction Date: 5/24/2013 2:58 PM | Delivery Method: | Site: | Lending String: | Borrower: GENIELIB 1

Service Level: Regular | Shipping Options: Mail | System ID: LWeb -1

Billing Account: | Doc Type: | OCLC Status: |

Article Info | Loan Info | Collections | Local Holdings | Imported Request | Copyright | In

Journal Title: Whole Dog Journal

Volume/Issue: 35 | \$

Month/Year/Pages: May 2001 | 12-13

Article Author: Smith, John

Article Title: Dogs and you

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 | Anel | Odyssey (Missing OdysseyIP)

Item Information

Call Number: AB 123

Location: stacks

Due Date:

Reason For Cancellation:

Item Num/Ref Num:

ISxN:

Special Instructions:

Max Cost/Pieces: 1

Citation Information

Cited In:

Title:

Date:

Volume/Pages:

Note

Date	Note	Type	Added By
5/24/2013 2:58 PM	Article Exchange URL: http://oc.lc/112y6m Article Exchange Password: V7y2bYpC	System	atlas
5/24/2013 2:42 PM	testing article exchange	User	GENIELIB

Request Finished

ILLiad adds Article Exchange delivery information to the Note field for non-OCLC libraries.

Article Exchange Lending: Non-OCLC Libraries

The screenshot displays the ILLiad Lending Request interface for request ID 35. The 'Tracking' table shows the request's progress from submission to completion. The 'History' table provides a detailed log of status changes. The 'E-mail History' table shows an email sent to 'genie@atlas...' on 5/24/2013. A red circle highlights the email content, which includes the article title 'Dogs and you', author 'Smith, John', and journal 'Whole Dog Journal'. The email also contains a password and retrieval instructions.

Tracking

Date Changed	Changed To	Changed By
5/24/2013 2:42 PM	Submitted via Lending Web	GENIELIB
5/24/2013		
5/24/2013		
5/24/2013		
5/24/2013		
5/24/2013		
5/24/2013 2:58 PM	Request Finished	System

History

Date Changed	Entry	Username
5/24/2013 2:43 PM	Updated status to Request in Processing	atlas
5/24/2013 2:44 PM	Updated status to Awaiting Lending Request P...	atlas
5/24/2013 2:44 PM	Updated status to Request in Processing	atlas
5/24/2013 2:44 PM	Updated status to Awaiting Stacks Searching	atlas
5/24/2013 2:44 PM	Updated status to In Stacks Searching	atlas
5/24/2013 2:58 PM	Updated status to Awaiting Lending Scanning	atlas
5/24/2013 2:58 PM	Article Exchange email sent	System
5/24/2013 2:58 PM	Status changed to Request Finished by System.	System

E-mail History

ID	Transactio...	E-Mail Date	E-Mail Type	E-Mail Refe...	E-Mail To	E-Mail F
1	35	5/24/2013 ...	Transaction	35	genie@atla...	ILLiad

Email Content:

Dear Genie Library,

Your requested article is available at <http://oc.ic/i1zySm>
 Use this case-sensitive password: V7yztPc

Article Title: Dogs and you
 Article Author: Smith, John
 Journal Title: Whole Dog Journal
 Journal Volume: 35
 Journal Year: 2001
 ILL: LWeb -
 Our TN: 35

Please note the following time constraints:
 * Once a file is retrieved, it remains available for thirty (30) days. After thirty days, the file will be removed from the Article Exchange site.
 * Each document file can be retrieve a maximum of five (5) times for each 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 Mon-Fri 8-5.

Thank you for using Interlibrary Loan and ILLiad.
 Questions and comments regarding Interlibrary Loan policies and procedures may be directed to csa@atlas-sys.com
 Our office phone number is 757-467-7872.

ILLiad sends email to library if **BorrowingDepartmentEmail** is valid in requesting library's Lender Address Record

Article Exchange Configuration Steps

1. Obtain Web Service Key and Secret from OCLC
2. Obtain SSL Certificate for your ILLiad web server
3. Add Customization Manager Configurations
 - a) OCLC Web Key and Secret
 - b) ILLiad Web Platform Configurations
 - c) Borrowing and Lending Specific Configurations

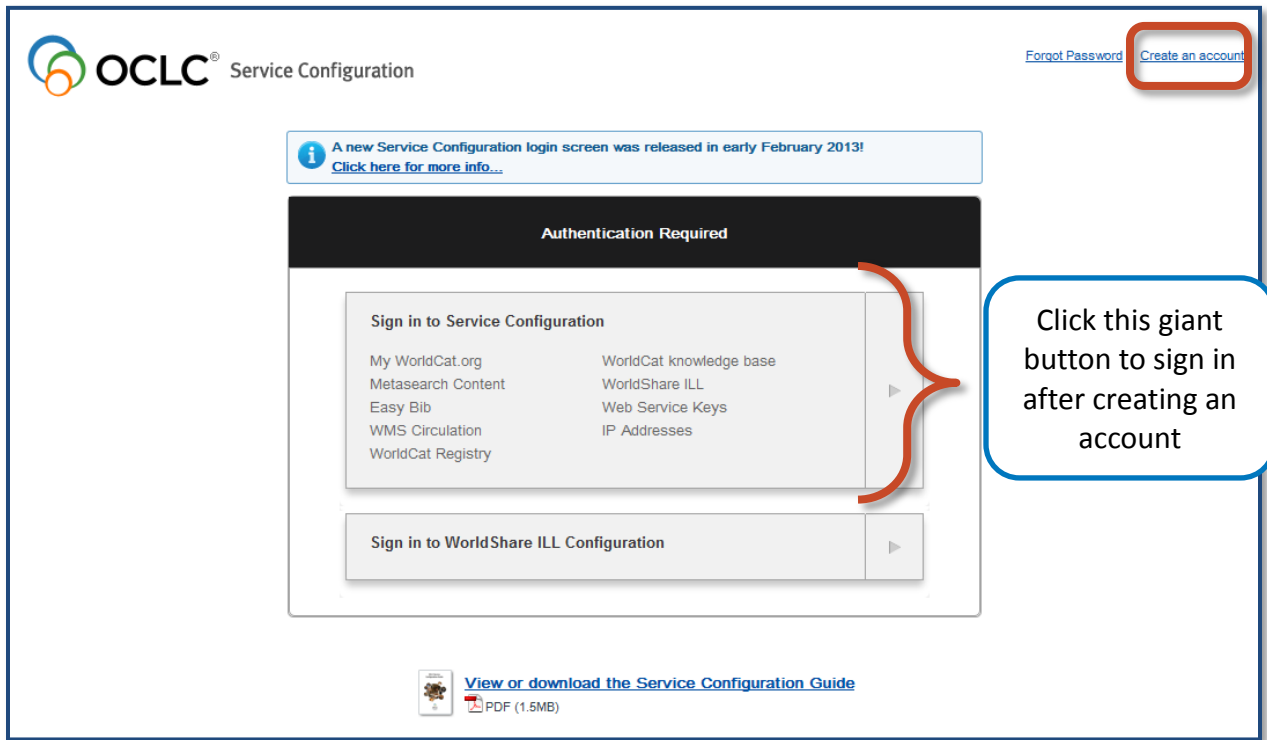
Atlas Article Exchange Demo Videos

<http://atlas-sys.wistia.com/projects/9c84c89449>

Obtain OCLC Web Service Key

- Apply for key
 - www.worldcat.org/config
 - Create account
 - Authorize your account for your institution

- Settings option in top right
 - Authorize Institutions
 - Add OCLC 9-digit Autho and Password
- Return to Service Configuration
 - Web Service Key
 - Request Key
 - Select Environment = **Production**
 - Selection Your Type of Application = **Application Hosted on your server**
 - Choose Services
 - Article Exchange
 - Interlibrary Loan Policies Directory
 - Fill in form and submit
- Request will display in **Manage Key Requests** link in left hand menu
- OCLC will email notice when key is created
- Sign in to Service Configuration
- **Manage Keys**
- **Request Secret**
- Secret will be generated immediately



OCLC® Service Configuration

Welcome Heather Black (Settings | Help | Sign out)

<< Return to SC Home Page

hjoyclark's Settings

Authorize Institutions

Configure Products

Add more institutions to configure

Enter your FirstSearch, OCLC Resource Sharing, or Connexion authorization in order to add more institutions to configure:

Required fields are marked with an asterisk (*).

Administrator Authentication

Autho:*

Password:*

You are currently authorized to configure these 1 institutions:

OCLC Illiad Training Two

From the **Settings** link and select **Authorize Institutions** to link your account to your institution's 9-digit OCLC Auth and Password. Then click **Return to SC Home Page**.

OCLC® Service Configuration

Welcome Heather Black (Settings | Help | Sign out)

Select an Institution

My WorldCat.org

Metasearch Content

Inbound Link Resolution

Mobile Client

EasyBib

WorldCat Registry

IP Addresses

WorldShare ILL

Web Service Keys

Request a Web Service Key

Select Environment

Production Sandbox

Select Your Type of Application

How will the key be used?

OpenSocial App uploaded to an OCLC container

Application hosted on your server

Choose Services

Article Exchange

Availability Query

Find A Library

Interlibrary Loan Policies Directory

From the **Web Service Key** option, select **Request Key**. Add these values to the request:

- **Production**
- **Application on your hosted server**
- **Article Exchange**
- **Interlibrary Loan Policies Directory**

Select an Institution

- My WorldCat.org
- Metasearch Content
- Inbound Link Resolution
- Mobile Client
- EasyBib
- WorldCat Registry
- IP Addresses
- WorldShare ILL
- Web Service Keys**
- Request Key
- Manage Keys
- Manage Key Requests

Generate new API keys: WorldCat Search API

Your application for a new key will be associated with your account

User Name: hjoyclark
The User Name cannot be changed.

Under no circumstances will we change ownership of API keys between accounts.

Your account profile needs to be updated with additional information. Please check below for blank fields that require an entry.

Fields marked with an asterisk * are required.

Personal Information

First Name: *

Last Name: *

Email Address: *
Key information will be sent to this email address

Country: *

Organization Name: *

Web Site URL: *

Telephone Number: *

Job Title:

Registration Comments:
Please give us an idea of what you are working on.

Maximum 255 characters

Symbol:
Be sure to include your library symbol, if you have one, to ensure expedited processing of your request.

Key Usage

I am interested in commercial use of this web service.

I need to access data for other institutions.

Terms and Conditions

You must agree to all Terms and Conditions.

I agree to the WorldShare Platform Developer [Terms and Conditions](#) *

I agree to the WorldCat Search API [Terms and Conditions](#) *

- Complete application form
- Be sure to agree to all terms and conditions
- **Generate Key Request**



OCLC® Service Configuration

Select an Institution

My WorldCat.org
 Metasearch Content
 Inbound Link Resolution
 Mobile Client
 EasyBib
 WorldCat Registry
 IP Addresses
 WorldShare ILL
Web Service Keys
 Request Key
 Manage Keys
 Manage Key Requests

Manage your Web Service Key Requests
 All approved API key requests associated with your account are listed below.

Requests

Key/Request ID	Services	Environment	Created	Status
request id 6042	Article Exchange, Interlibrary Loan Policies Directory	Production	06/04/2013	NEW

Need Help? [Help and Tutorials](#) [E-mail: Support Page](#) +1-614-764-6000, ext. 3510 INTL 1-800-848-5800 USA

- After receiving email confirmation from OCLC, return to **Manage Keys** and generate **Secret**

SSL Certificate

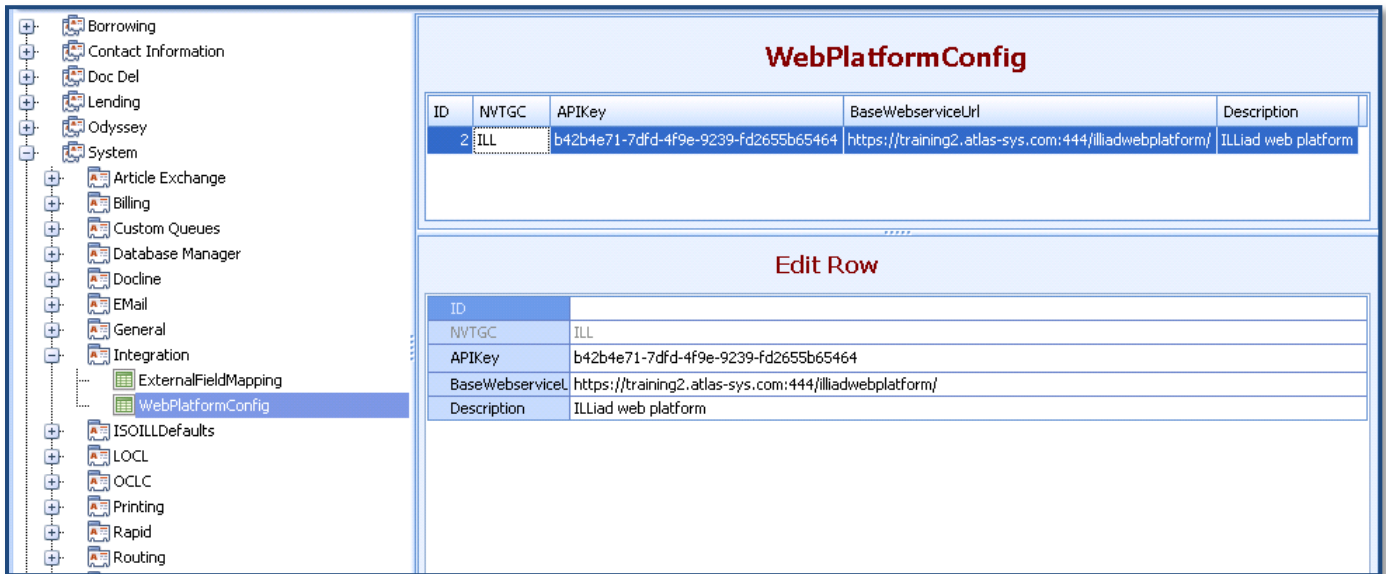
- If locally hosted, need to obtain
- OCLC hosted
 - SSL Certificate obtained
 - No fees after July 1
- Adding a SSL certificate to your ILLiad web server will change the default URL to log onto ILLiad from the web (from **http:// yourILLiadwebaddress** to **https:// yourILLiadwebaddress**). Be sure to change all references to that link in your web pages and in your OpenURL resolver if you are using one.

ILLiad Configurations

Customization Manager

- Add OCLC Web Service Keys to
- System
 - OCLC
 - OCLCWebServiceV2APIKey
 - OCLCWebServiceV2APISecret
- Create **ILLiad Web Platform** Configurations
 - System
 - Integration
 - WebPlatformConfig

- Click **New Record**
- Add **APIKey** value by clicking the ... icon at the end of the field
- Add **BaseWebserviceUrl**
 - Must be secure site (i.e. begins https://)
 - Add /illiadwebplatform/ to end of URL
 - Entry example: <https://training2.atlas-sys.com/illiadwebplatform/>
- Add **Description**
 - **This is a required field**



- Add **Record ID** number created in steps above to
 - System
 - Web Platform
 - **ILLiadWebPlatformConfig**

AE Borrowing Configurations

- Trusted Sender for Article Exchange
 - System
 - Article Exchange
 - ArticleExchangeTrusted
 - Value options: Always, Trusted, Never
 - Same Trusted value in Lender Address record is used for both Odyssey and Article Exchange

AE Lending Configurations

- System
 - Article Exchange
 - ArticleExchangeLendingEmailSubject
 - Recommend: Adding Institution name to default subject
 - ArticleExchangeLendingEmailSystemIDs
 - *****Need to add these values in order for ILLiad to send the email RAPID, DOC, ISO, LWeb etc.*****
- Edit AE email template in Customization Manger (optional)

- **E**Mail Templates Ribbon
- Select **ArticleExchangeLendingNotification** from **Edit** drop down
- Make edit as desired

Fifteen Symbols in Lender String

- Borrowing
 - Allows entry of up to 15 symbols in lending string
 - Using default custom holdings will generate only 5 lenders in string
 - All symbols will display on **Check-In from Lending Library** workspace
 - Still adds extra symbols to locations when creating requests
- Lending
 - Currently only displays from your symbol to the end of string
 - E.G. If ABC library is lender #4, ABC as lender will only see symbols 4-15

The screenshot shows the OCLC Borrowing Request interface. The title bar indicates '1551 - Borrowing Request'. The search criteria include Keyword 'Everlasting Chesterton', Scan Title 'Everlasting Man', and Derived 'Eve, Ma,,'. The 'Bibliographic Information' section is highlighted with a red arrow pointing to the 'Lenders' field, which contains the string 'APL,ATO,CAU,CNC,CLE,DMM,JCU,KSU,OTC,WAL,TOL,MTU,DAY,AKR,CAU'. The 'Borrowing Information' section shows 'Ship Via' as 'Library Mail', 'Max Cost' as '35.00', and 'Borrowing Notes' as 'THIS IS A TEST ACCOUNT. PLEASE DO NOT FILL. Thank you!'.

Log in to ILLiad Web as Patron

- Permissions required in Staff Manager
 - Not allowed by default
- Access from User Record
- Logged in **Event Log** (on **System** Ribbon) when used
- Remote auth users need additional Customization Manager Key

- System | General | StaffProxyWebURL

ILLiad Staff Manager 8.4.0.0

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
admin			ALL
atlas			ALL
gryan	Gretchen	Ryan	ILL
hblack	Heather	Black	ILL
MBBurke	Mary Beth	Burke	ILL
oclc			ALL

User Details

Username: hblack
 First Name: Heather
 Last Name: Black
 Site: ILL
 Description:

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

Add permission to Staff user account

User Record

dhall - User

Home

Change Password Print User Borrowing Document Delivery Cleared Not Cleared Blocked Disavowed

User Information Requests Accounts Email History

Details

User Name: dhall Status: Faculty Email Address: hblack@atlas-sys.cor Expiration Date: 7/7/2012

Last Name: Hall Department: Other - Unlisted Phone: 879-298-2983 Request Limit:

First Name: Don Organization: Fax: ILLiad Authentication:

Without permissions

dhall - User

Home

Change Password Print User Logon to Web Borrowing Document Delivery Cleared Not Cleared Blocked Disavowed

User Information Requests Accounts Email History

Details

User Name: dhall Status: Faculty Email Address: hblack@atlas-sys.cor Expiration Date: 7/7/2012

Logon to Web

With permissions

Field Customizations

- Customize field names for staff members from **Staff Manager**
- New tab: **Field Customizations**
- Create record for each user
 - Identify field name to change: **Field Name**
 - Enter replacement text: **Display Name**
 - Can also choose to hide all together
 - **Save**
- Return to **Staff** ribbon
 - Select user
 - **Delete Layout & Grid Settings**
- Example: Change SSN to User ID

Add record for each staff member for each field in **Field Customizations Tab**

The screenshot shows the ILLiad Staff Manager interface. The 'Field Customizations' tab is selected, and the 'Field Customizations' sub-tab is active. The interface includes a ribbon with 'Save', 'Cancel', 'Remove', and 'Copy Field Customizations' buttons. Below the ribbon is a table with the following columns: Username, Field Name, Display Name, and Hidden. A red box highlights the 'Field Customizations' sub-tab. A callout box points to the 'Field Name' column. The table contains one row for user 'MBBurke' with 'SSN' as the Field Name and 'User ID' as the Display Name. A status bar at the bottom indicates 'Deleted 0 layout/grid settings for MBBurke'.

Username	Field Name	Display Name	Hidden
MBBurke	SSN	User ID	<input type="checkbox"/>

ILLiad Staff Manager 8.4.0.0

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
> admin			ALL
atlas			ALL
gryan	Gretchen	Ryan	ILL
hblack	Heather	Black	ILL
MBBurke	Mary Beth	Burke	ILL
oclc			ALL

User Details

Username admin
 First Name
 Last Name
 Site ALL
 Description Admin 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

hblack ILL Saved hblack

Search Changes

- Default Number searching in **Home** is now for **TN**
- Can change back to **ALL** or other number searching options by clicking on the **TN** button at the end of the search field
- Selections to request limits and buttons (borrowing, checked out) persist for user rather than for session as previously
- Shortcuts
 - Ctrl+Shift+T = TN
 - Ctrl+Shift+I = ILL Number
 - Ctrl+Shift+S = System Number
 - Ctrl+Shift+N = Invoice Number
 - Ctrl+Shift+A = All

The screenshot shows the ILLiad Client 8.4.0.0 interface. A red arrow points to a dropdown menu in the search area, which lists search criteria: All, Transaction Number (TN), ILL Number (ILL), System Number (SN), and Invoice Number (IN). The main window displays a 'Requests' list with 769 items, a 'Barometer' chart showing counts for Borrowing (237), Document Delivery (66), and Lending (244), and a 'System' alert table.

Alert	B	D	L
Connection Manager	19	1	34
Odyssey Manager	0	0	7
Outgoing E-Mail	293	29	106
Flagged Requests	24	0	0
Users To Clear	1	0	0

Other

- ILLiad – Aeon Integration
- Options from ILLiad Client button
 - Version display
 - Change Debug Logging
- Improved CCC order error processing
 - Notes individual record
 - Will only resend records with errors

IFM & Get It Now Addon Integration

- Allows to CCC to bill you through IFM
- Currently pilot program
 - Coordinate with CCC and OCLC if would like to participate
- Both Addons still available
- Requires
 - SSL certificate on server
 - OCLC service addition to wskey
 - New Addon with configuration to:
 - BillToIFM
 - IfmSpendingLimit
- Addon layout change
 - IFM fields
 - Status
 - Charges
 - Initiate IFM Purchase
 - Adds to ILLiad Request Detail
 - Record number
 - Lending String
 - SystemId
 - Copyright already paid
 - Cost