



ILLiad

International Conference

Let's Play Nice:

Shared Server 101

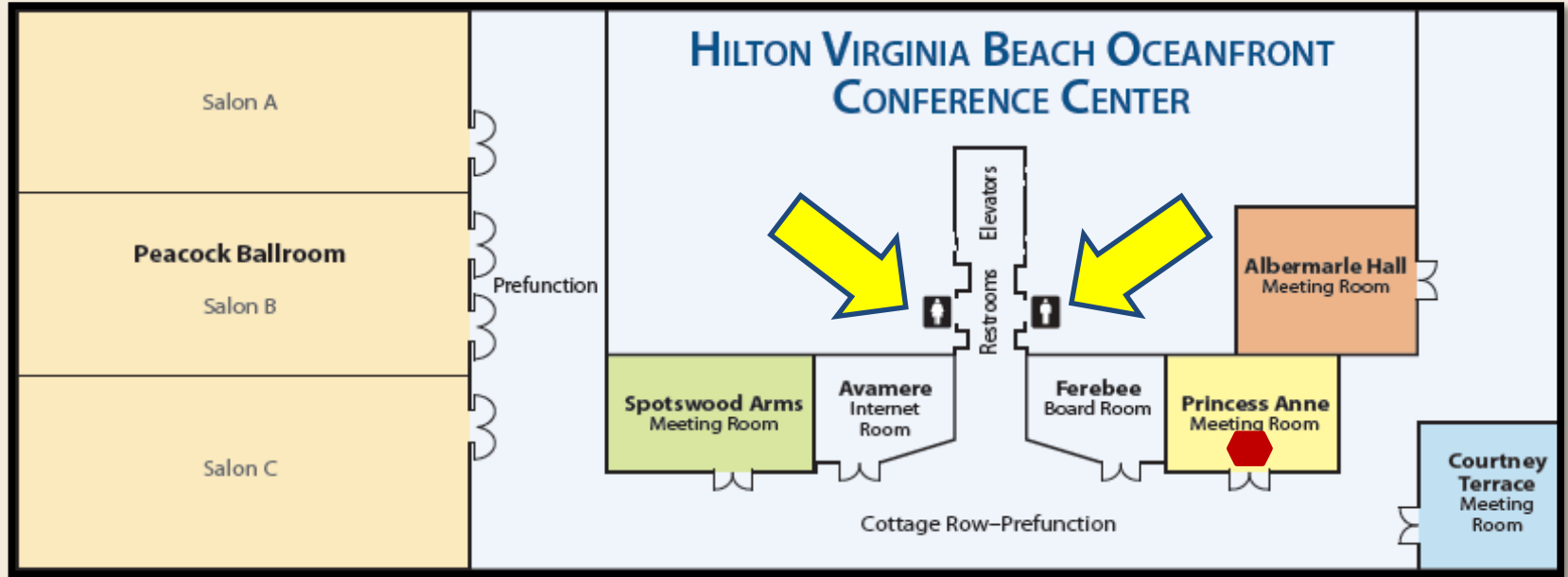
Let's Play Nice: Shared Server 101

Jennifer Cella, MSLS

- Customer Service Agent, Atlas Systems since 2006
- Over 12 years of library experience in Access Services
 - Document Delivery Services Librarian, University of Miami
 - Assistant Head of Access Services, Tulane University
- Interests outside of work
 - Gardening
 - Repurposing furniture
 - Volunteer Work
- Email: jcella@atlas-sys.com

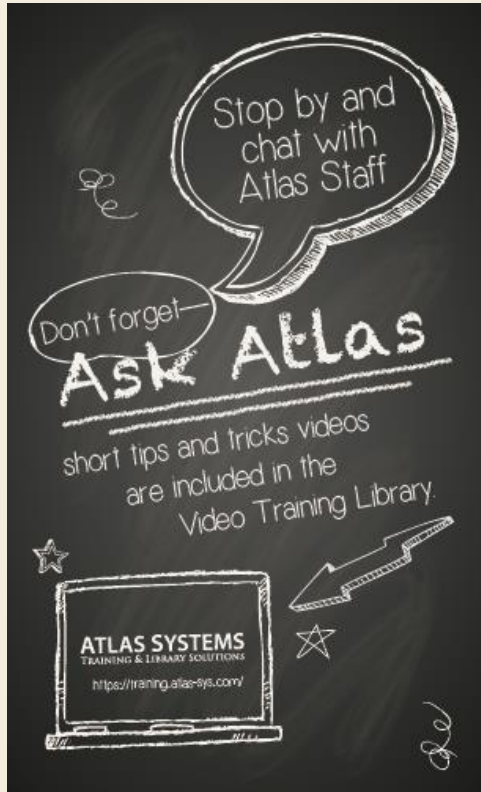


Housekeeping...



Restrooms

Housekeeping...



Ask Atlas...

- Stop by the new Ask Atlas table
- Located outside the Princess Anne room
- Staffed by Atlas Staff throughout the day
- Get your questions answered
- Shared your ideas
- Make suggestions

Topics

- Shared server setup
- Shared server affects on ILLiad components
- Distinguish shared settings
- Common shared server errors

LET'S PLAY NICE:

Shared Server 101

A decorative horizontal bar at the bottom of the slide, consisting of a long gold segment on the left, followed by a smaller gold segment, a red segment, and a blue segment, all set against a dark gold background.



SHARED SERVER SETUP

Shared Server Setup

Single Server Installation

- Single processing site
- One or more delivery locations
- One OCLC symbol

Shared Server Installation

- More than one processing site
- One or more delivery locations for each processing site
- One or more OCLC symbols

Shared Server Setup

Processing Site

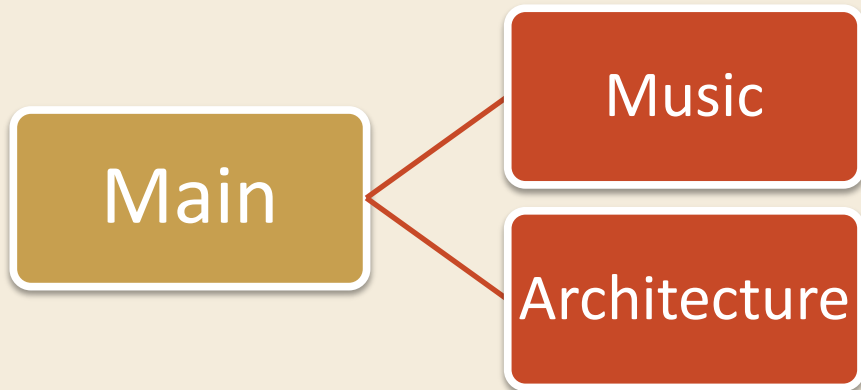
- Physical location where requests are processed
- Staff accounts can be restricted to a specific processing site

Delivery Locations

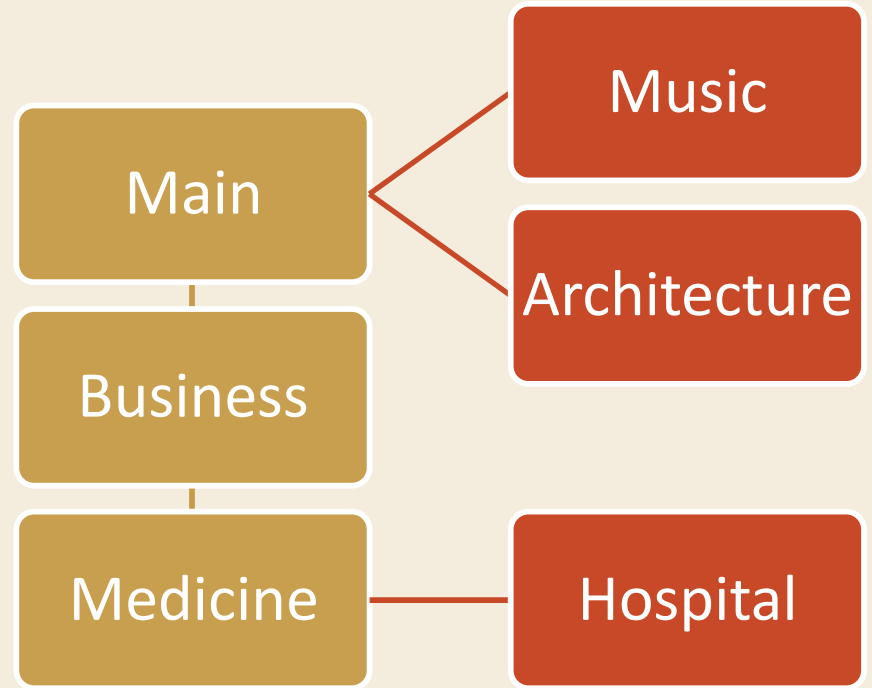
- Physical place where patrons pick up Interlibrary Loan materials
- May be a processing site, or it may be a totally different location
- A processing site can have more than one delivery locations

Shared Server Setup

Single Server



Shared Server



Disclaimer

For the purposes of this discussion the following terms are synonymous:

- Processing Site
- Processing Location
- NVTGC

Shared Server Setup

Sites must be added to a server by Atlas or OCLC

- Shared server tool
 - Replicates customization settings for the new site
 - Converts LenderAddresses table to LenderAddressesALL
 - Converts Users table to UsersALL
 - Creates logins and views on the SQL database
 - Lending transactions username converted to site/NVTGC
 - Borrowing transactions reference usersALL NVTGC



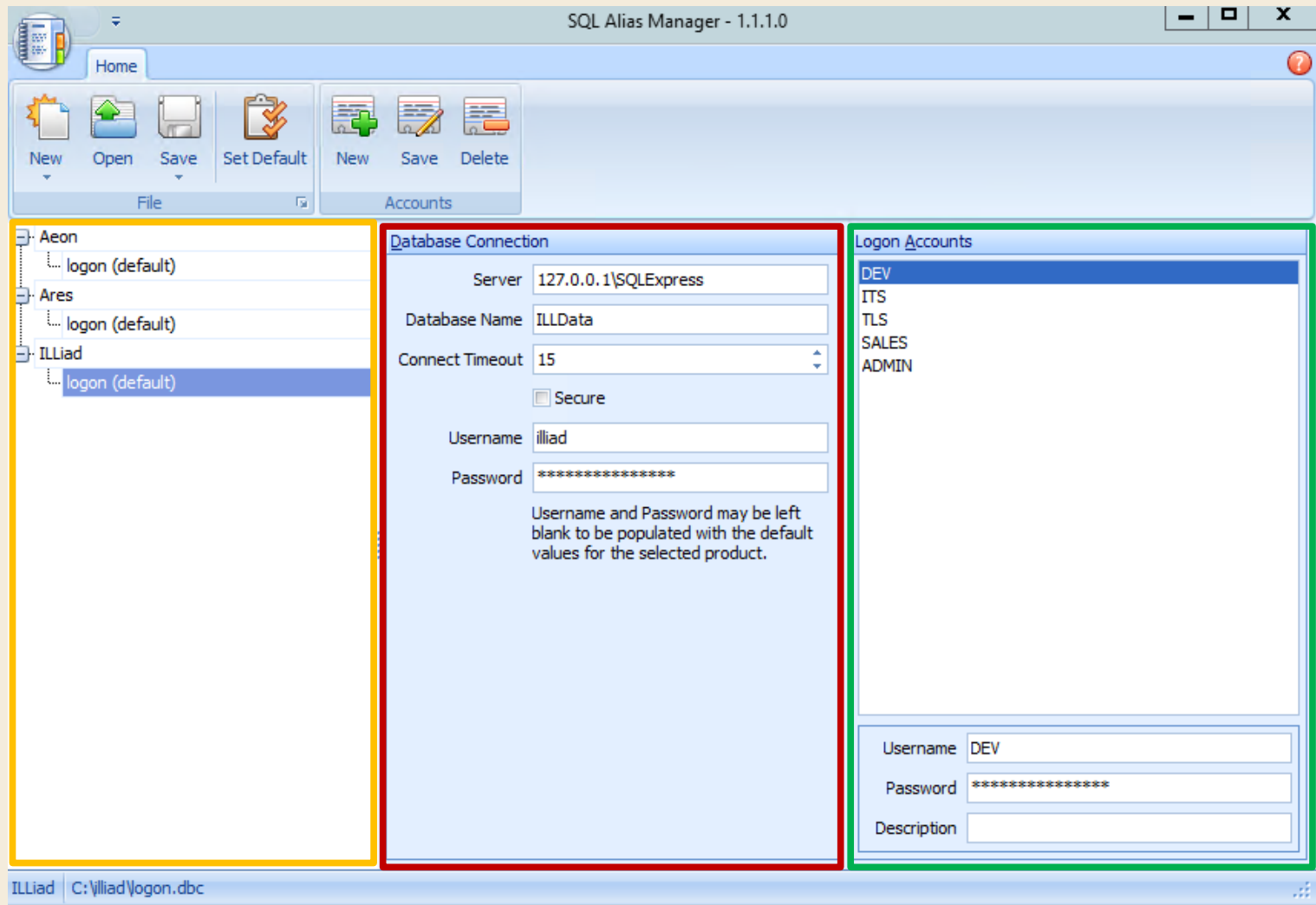
ATLAS SQL ALIAS MANAGER

Atlas SQL Alias Manager (SAM)



- Used to create database connections
 - Stores the SQL server connection information
 - Shared server is stores site code and password
 - Logon.DBC
- Logon.DBC used by ILLiad when performing any database operation
- Required on the server and the client workstations

Atlas SQL Alias Manager (SAM)



Product list and existing DBC files

Database connection information for selected DBC file

Logon accounts for shared server sites



ILLIAD STAFF MANAGER

ILLiad Staff Manager



- Used to create staff accounts for ILLiad client and modules
- Allows managers to grant staff access and permissions on individual basis
- References Site
 - Supervisors set to ALL allowing full access to all sites
 - Staff limited to the processing site to which they are assigned

ILLiad Staff Manager

ILLiad Staff Manager

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	
> admin			NVTGC
atlas	Atlas	Systems	ALL
cyoungblood	Chris	Youngblood	TLS
dspecht	Dan	Specht	SALES
johnb	John	Brunswick	TLS
kford	Kevin	Ford	TLS
kspires	Ken	Spires	ADMIN
mcalsada	Matt	Calsada	DEV
mchaney	Melanie	Chaney	ADMIN
odc	OCLC	Support	ALL
Staff	Staff	User	ALL
Student	Student	User	DEV

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

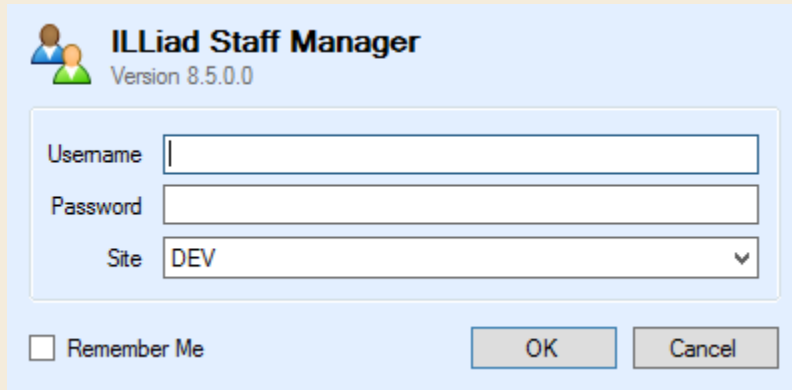
- Borrowing Read Borrowing Write
- Document Delivery Read Document Delivery Write
- Lending Read Lending Write

atlas ALL

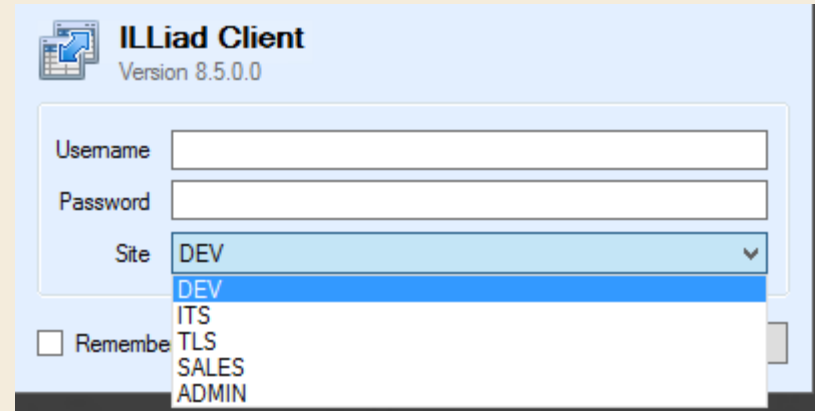
Created kford

ILLiad Staff Manager

- Access to ILLiad components is controlled by ILLiad Staff Manager and Logon.DBC
 - Restricting staff user by Site in the Staff Manager **will not** restrict the staff user's access to the ILLiad Client
 - Logon Accounts in the Logon.DBC control which Sites are accessible on the client workstation



The screenshot shows the 'ILLiad Staff Manager' login window, version 8.5.0.0. It features a light blue header with a user icon and the title. Below the header are three input fields: 'Username' (a text box), 'Password' (a text box), and 'Site' (a dropdown menu currently showing 'DEV'). At the bottom left is a checkbox labeled 'Remember Me', and at the bottom right are 'OK' and 'Cancel' buttons.



The screenshot shows the 'ILLiad Client' login window, version 8.5.0.0. It has a similar layout to the Staff Manager window. The 'Site' dropdown menu is open, displaying a list of available sites: 'DEV', 'ITS', 'TLS', 'SALES', and 'ADMIN'. The 'DEV' option is currently selected and highlighted in blue. The 'Remember Me' checkbox and 'OK'/'Cancel' buttons are also visible at the bottom.

Questions





ILLIAD CUSTOMIZATION MANAGER

Customization Manager



- Facilitates customization of your ILLiad system
- Staff account controls access on shared servers
 - Access restricted by site/NVTGC
- Each site on a shared server has a set of site specific keys allowing complete customization
 - Email and print templates, OCLC settings, etc.

Customization Manager

The screenshot displays the ILLiad Customization Manager interface, which is used for configuring the system. It features a top navigation bar with tabs for Home, Z39.50, E-mail Templates, and Server Addons. A left sidebar contains a tree view of system components, with a dropdown menu for site selection. The main workspace is divided into three panes: a top toolbar with various actions like New Record, Copy Record, and Save; a middle pane for staff management; and a bottom pane for user management.

ILLiad Customization Manager (atlas)

ILLiad Staff Manager Site = **ALL**

ILLiad Customization Manager (mcalsada)

ILLiad Staff Manager Site = **DEV**

ILLiad Staff Manager

Staff

Users | Field Customizations

Drag a column header here to group by that column

Username	First Name	Last Name	NVTGC
> atlas	Atlas	Systems	ALL
odc	OCLC	Support	ALL
admin			ALL
Staff	Staff	User	ALL
Student	Student	User	DEV
mcalsada	Matt	Calsada	DEV
dspecht	Dan	Specht	SALES



DISTINGUISHING SHARED SETTINGS AND COMMON ERRORS

Distinguish Shared Settings and Common Errors



- Customization keys
 - Primarily stored in the Customization Table
 - Reference the NVTGC
- Customization tables
 - Most tables contain entries for all sites on a shared server
 - Some do not reference the Site or NVTGC
 - Pop-up warning displays on shared tables
 - Entries in shared tables need to be distinguishable

Distinguish Shared Settings and Common Errors

The screenshot displays the ILLiad Customization Manager (atlas) interface. The title bar reads "ILLiad Customization Manager (atlas)". The main menu includes "Home", "Z39.50", "E-mail Templates", and "Server Addons". The toolbar contains various icons for "ILL", "Table Options" (New Record, Copy Record, Reset Filter), "Editing Options" (Save, Delete, Cancel), "Maintenance" (Show Change History), "Search All Tables and Keys", "Favorites", and "Setup Wizards".

The left sidebar shows a tree view of settings categories, with "General" expanded. Under "General", "DeliveryLocations" is selected and highlighted with a blue box. Other items in the tree include "BorrowingOverdueNoticesActive" (also highlighted with a blue box), "CustomDropDown", "Customization", "ESPSupport", "LendingOverdueNoticesActive", "LocalRouting", "OverdueNoticesRunNow", "OverdueNoticesRuntime", and "PrintDocumentsPath".

The main content area displays a table titled "DeliveryLocations". The table has two columns: "Symbol" and "Value". The data rows are as follows:

Symbol	Value
ILL	ILL Office
DEV	DEV Library
TLS	TLS Library
ITS	ITS Library
ADMIN	ADMIN Library
SALES	SALES Library
TRAINING	Training Pickup Location
SUPPORT	Support Pickup Location

Distinguish Shared Settings and Common Errors



- Shared server requires entry for each processing site in the following tables:
 - LocalInfo
 - CustomDropDown
 - DeliveryLocations
 - LenderAddressesALL
 - Needed for local routing of requests between sites
- Primary Lending Download Key
 - Required on a shared server when more than one site shares an OCLC symbol
 - Lending requests download to one site and are routed manually

Distinguish Shared Settings and Common Errors

System Billing

Setup

BillingAdditions

The screenshot shows the ILLiad Customization Manager (atlas) interface. The main window displays the 'BillingAdditions' table with the following data:

AdditionName	AdditionCategory	BaseFee	Range1Pages	Range1Amount	Range2Pages	Range2Amount	Range3Pages
Spec Coll Scan	DEV Default	10.00	99999	0.00	99999	0.00	99999
Scan Service	SALES Default	20.00	99999	0.00	99999	0.00	99999

A warning dialog box titled 'Server Wide Table' is displayed in the foreground, containing the following text:

Changes to this table will affect ALL sites. Do you wish to continue?

The dialog box has 'Yes' and 'No' buttons at the bottom.

Distinguish Shared Settings and Common Errors

System Billing

Setup

BillingAdditions

ILLiad Customization Manager (atlas)

Home 239.50 E-mail Templates Server Addons

DEV NVTGC Table Options Editing Options Maintenance Search Favorites Setup Wizards Setup

BillingAdditions

AdditionName	AdditionCategory	BaseFee	Range1Pages	Range1Amount	Range2Pages	Range2Amount	Range3Pages
Spec Coll Scan	DEV Default	10.00	99999	0.00	99999	0.00	9999
Scan Service	SALES Default	20.00	99999	0.00	99999	0.00	9999

Edit Row

AdditionName	
AdditionCategory	
BaseFee	
Range1Pages	
Range1Amount	
Range2Pages	
Range2Amount	
Range3Pages	
Range3Amount	

- No Site/NVTGC field
- Use AdditionName or AdditionCategory field to distinguish entries

Distinguish Shared Settings and Common Errors

System Billing

Setup

- Field in Billing Tables used to distinguish Sites
 - BillingDefaults
 - Category
 - BillingServiceLevels
 - ServiceLevel
 - BillingServiceType
 - ServiceType
 - BillingShippingFees
 - ShippingMethod

Distinguish Shared Settings and Common Errors

System

Routing

Routing

The screenshot shows the ILLiad Customization Manager (atlas) interface. The main window displays the 'Routing' configuration table. The table has columns for RuleNo, RuleActive, ProcessType, TransactionStatus, MatchString, and NewPro. The MatchString column contains conditional logic for different rule types. A red bracket highlights the MatchString column, and a red box contains a list of notes explaining the logic.

RuleNo	RuleActive	ProcessType	TransactionStatus	MatchString	NewPro
1	No	Borrowing	Awaiting Request Processing	t.DocumentType = 'Rush' and u.NVTGC = DEV	Borrowir
2	No	Lending	Awaiting Shipping Label Printing	t.username='TLS' and t.RequestType = 'Loan'	Lending
3	No	Lending	Awaiting Shipping Label Printing	t.username='DEV' and t.RequestType = 'Loan'	Lending
4	No	Borrowing	In Transit to Pickup Location	u.NVTGC in('DEV','TLS','ITS') and t.RequestType = 'Loan'	Borrowir
5	No	Borrowing	Awaiting Copyright Clearance	t.PhotoJournalYear < '2010'	Borrowir

- Borrowing rules reference **u.NVTGC**
- Lending rules reference **t.username**
- If no value is designated, the rule impacts **ALL sites** on a shared server installation

Distinguish Shared Settings and Common Errors

System

Integration

WebPlatformConfig

ILLiad Customization Manager (atlas)

Home 239.50 E-mail Templates Server Addons

ILL NVTGC New Record Copy Record Reset Filter Table Options Save Delete Cancel Editing Options Show Change History Maintenance Search All Tables and Keys Search Favorites Setup Wizards Setup


System

- Artide Exchange
- Billing
- Custom Flags
- Custom Queues
- Database Manager
- Dodine
- E-Mail
- General
- Integration
 - ExternalFieldMapping
 - WebPlatformConfig**
- ISOILLDefaults
- LOCL
- OCLC
- Printing
- Print

WebPlatformConfig

ID	NVTGC	APIKey	BaseWebserviceUrl	Description
1	ILL	b4ccb85d-8ec9-466d-b4c4-ae4691a281c6	https://jac-alpha/illiadwebplatform/	ILLiad Web Platform
2	ADMIN	88562ecc-27c0-4471-9909-caa0753557ec	https://jac-alpha/aeon/webplatform/	Aeon Web Platform
3	DEV	68dabfa3-056f-485f-af0a-a109a3eed0c4	https://jac-alpha/aeon/webplatform/	Aeon Web Platform
4	ITS	85b72b49-1c6b-45bd-97fd-b2f4d36bc9cd	https://jac-alpha/aeon/webplatform/	Aeon Web Platform
5	SALES	aacbc140-d036-40e3-80c8-907295e56d9a	https://jac-alpha/aeon/webplatform/	Aeon Web Platform
6	TLS	13d57a87-1718-4abd-bdc4-41bb6a1452ad	https://jac-alpha/aeon/webplatform/	Aeon Web Platform

ILLiadWebPlatformConfig
RemoteAuthWebPath
VersionWebPlatform
WebPath
WebPDFPath
WebPlatformConfig



Let's Play Nice: Shared Server 101



- Shared server
 - Sites each work independently on the same server and database, using views of tables in ILLData
- Updates
 - Shares server sites must coordinate for server updates and maintenance

Questions

