

ALL THINGS BRIGHT & BEAUTIFUL

IMPLEMENTING ILLIAD'S MOST RECENT FEATURES

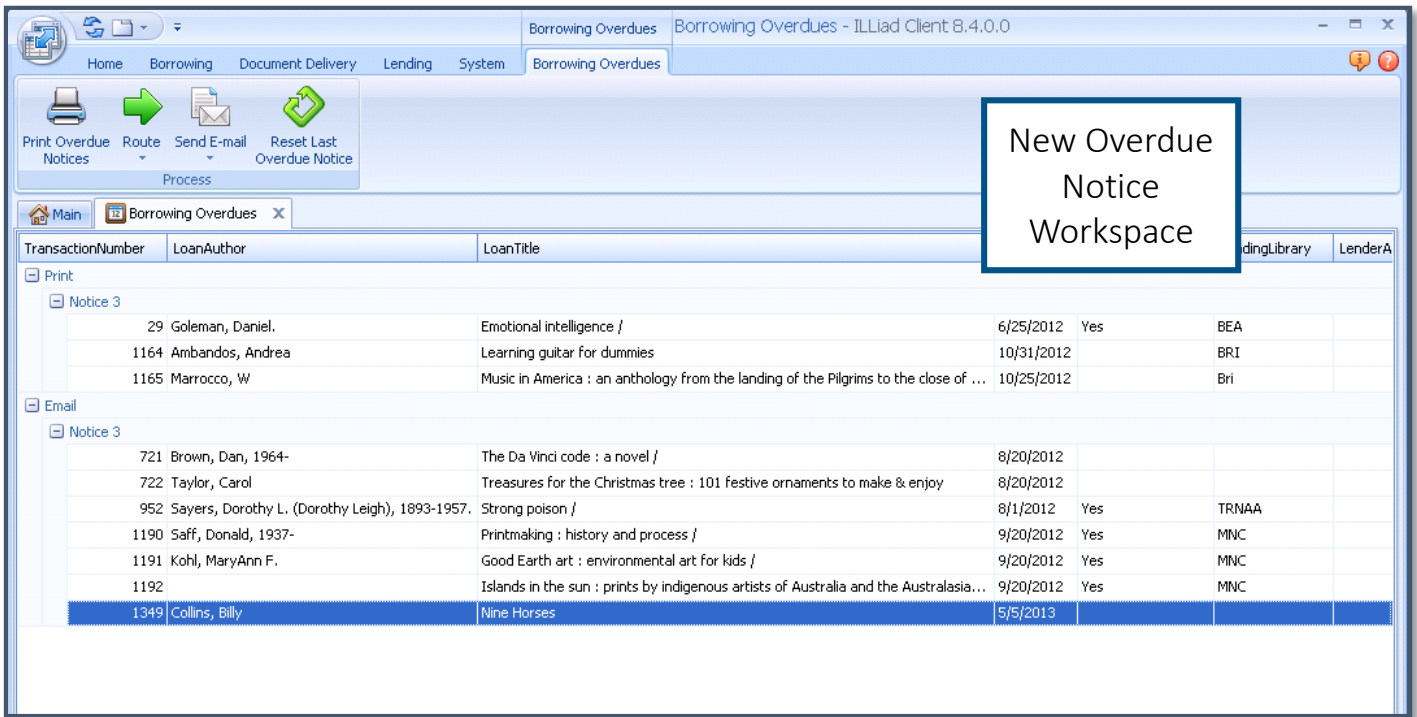
ILLIAD CONFERENCE 2015

- Big Things
 - Overdue Notifications
 - Article Exchange Integration
 - Borrowing Notifications and Revised Workflow
 - Custom Flags & Special Messages
 - Cloning Requests
- Not as Big Things
 - Fifteen Lenders
 - Field Label Display
 - Log-On as User
 - Search Changes
 - Odyssey Helper Auto Mode
 - Change Request Type for Lending
 - OCLC Terminology
 - Viewing Holdings Information
 - Minor Display Changes

Versions 8.4 & 8.5

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



- 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

The screenshot shows the 'Check In From Lending Library' window in ILLiad. The interface includes a toolbar with buttons for 'Check In', 'Check In Now', 'Check In Scan Later', 'Partial/Incorrect Request', and 'Cancel Request'. A red box labeled '2' highlights the 'Check In' button. Below the toolbar is a table with columns for Transaction Number, Username, Request Title, Loan Author, Loan Title, Loan Publication, Loan Place, Loan Date, Loan Edition, Photo Journal, and Photo Journal Date. The main form area contains fields for Transaction Number (36), ILL Number, Customer Name (Stephanie Spire (Staff)), Delivery Location (TLS), Electronic Delivery? (checked), and Title (Dogs and you). A red box labeled '1' highlights the 'Article Exchange URL' (http://oc.lc/112y5m) and 'Article Exchange Password' (v7yzbYpC) fields. Other fields include 'Article Exchange URL', 'Article Exchange Password', 'Inclusive Pages' (12-13), 'Lending String', 'Lender String' (TRNAA), 'Address Number' (1), 'NVTGC' (TLS), and 'Library Name' (test).

System 37 - Borrowing Request

Borrowing Processing OCLC

Cancel Request, Renew Request, Serial Delivery Notification, Route, Route To Document Delivery, Gateway Search, Remove Payment, Order Status, Policies Directory, Billing, View

Detail History OCLC Z39.50 PubMed/Docline

General Request Information

Transaction Number: 37 Article Loan
 Username: jbrunswick Wanted By:
 Transaction Date: 5/24/2013 3:53 PM Not Wanted After:
 Delivery Method: Mail to Address Site:
 Service Level: Regular Shipping Options:
 Billing Account: Doc Type: Article

OCLC Information

ILL Number: 10-9979331
 OCLC Number: 1782154
 Lending String: *TRNAA,TRNAA,TRNAA
 Lender: TRNAA
 System ID: OCLC
 OCLC Status: SHIPPED 20130524

Article Info Loan Info Collections Local Holdings Imported Request User Copyrig

Journal Title: Potato chipper.
 Volume/Issue: 45 6
 Month/Year/Pages: June 2002 15-16

Article Exchange URL and Password saved as note

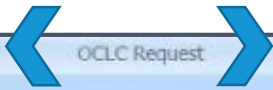
Notes:

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/eMpgFb Article Exchange Password: e6Sq5tGp	Lender	System

Awaiting Article Exchange Retrieval User Not Cleared

Borrowing AE via OCLC Alert

Article Exchange URL and Password saved as note



OCLC Request

Home

Save Delete Show Transaction Yes No Manual Complete Manual Receive Manual Not Received Manual Return Manual Processing

Work Form Detail Local Holdings Collection Data

General Information

ILL: 10-9979331 Borrower: TRNAB Req Date:
 Status: SHIPPED 20130524 Patron: Brunswick, Jof Rec Date:
 OCLC: 1782154 Source: ILLiad
 Lending String: *TRNAA,TRNAA,TRNAA

Bibliographic Information

U Title: Title: Potato chipper.
 Author: Edition: Series:
 Article: Idaho bound Article Author: Jones, Tom
 Imprint: Hanover, Pa. [etc.] Potato Chip Institute International. Volume: 45 No: 6
 Date: June 2002 Pages: 15-16 ISSN: 0032-5562
 Verified: <TN:37><ODYSSEY:216.54.57.232/TL> OCLC DOI: PMID:

Borrowing Lending

Ship To Attention: Bill To Attention:
 Ship To Address: Atlas Training/244 Clearfield Ave. Suite 407/Virginia Beach, VA/24 Bill To Address: same
 City: State/Province: City: State/Province:
 Postal Code: Country: Postal Code: Country:
 Ship Via: Media Rate: Max Cost: 0.00 Type: Other Copyright Compliance: CCL
 Borrowing Notes: This is a test account. Please do not fill. (maxCost: free) Billing Notes: This is a test account. Please do not fill.
 EMail: jbrunswick@atlas-sys.com <ODYSSEY:216.54.57.217/ILL> Affiliation:
 Fax: Locations:

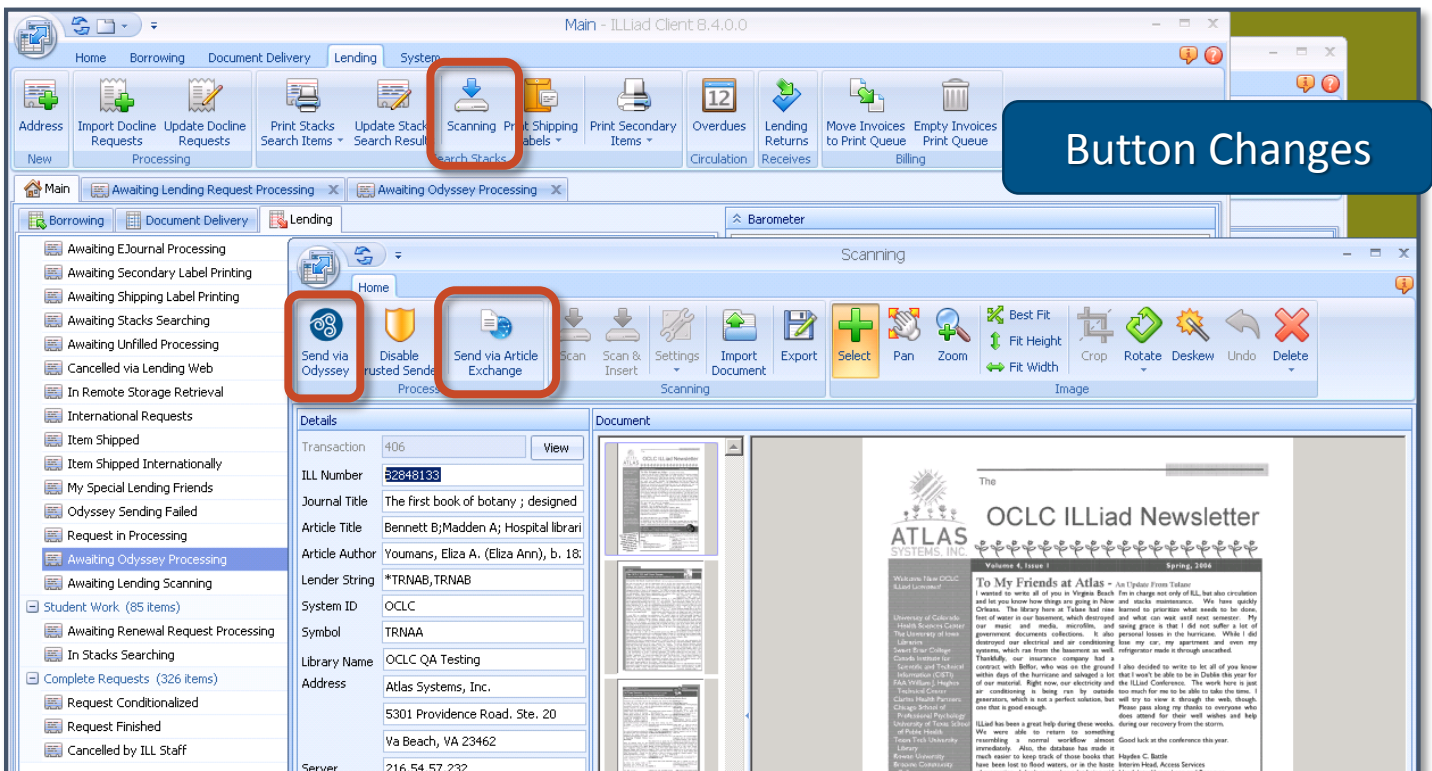
OCLC Request Borrowing AE via OCLC Alert

OCLC Request
Borrowing AE via OCLC Alert

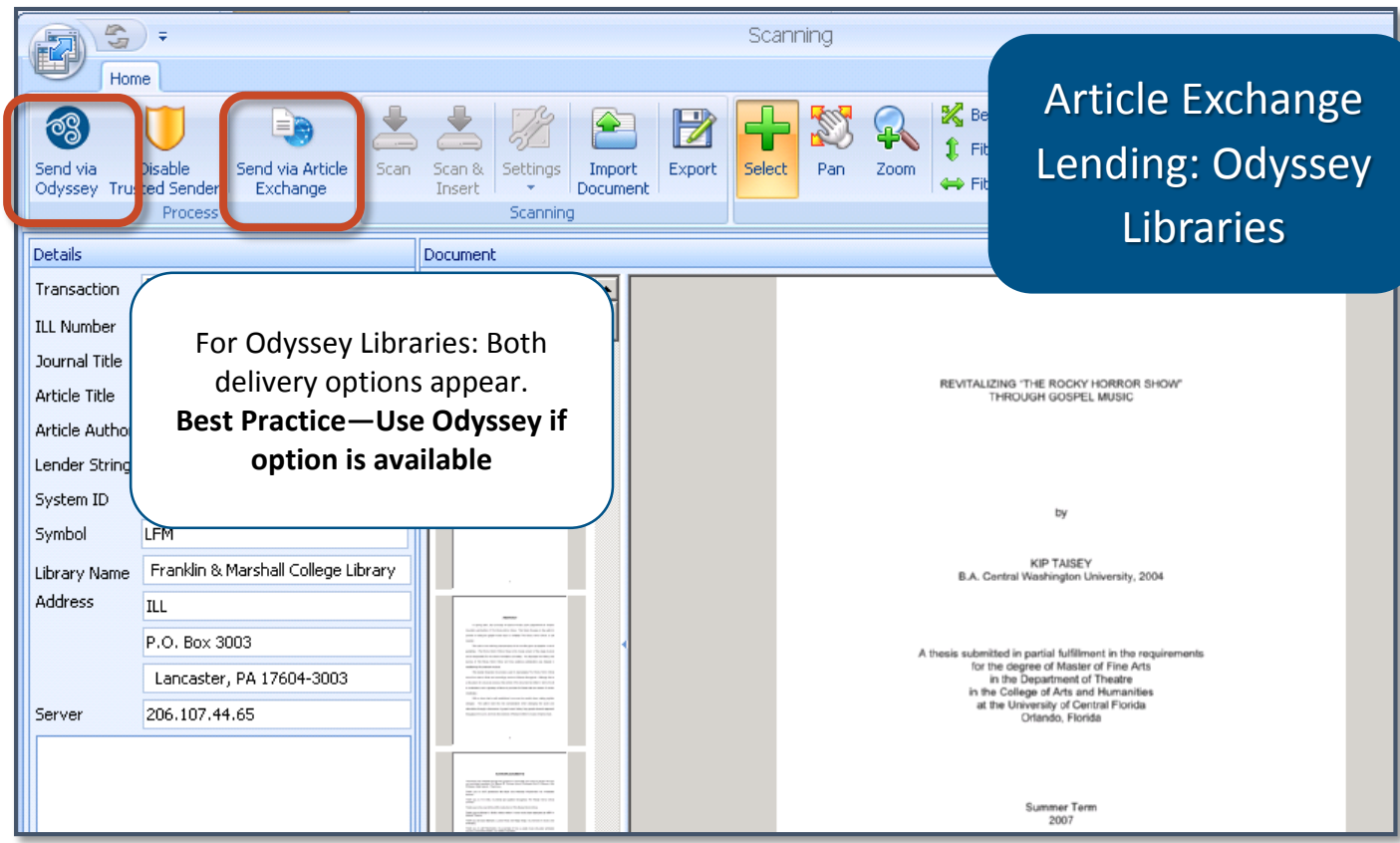
Alert: AEURL: http://oc.lc/eMpgFb AEPasswrd: e6Sq5tGp

Lending

- Changes to **Mark Found Scan Now**
 - Scanning workflow 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

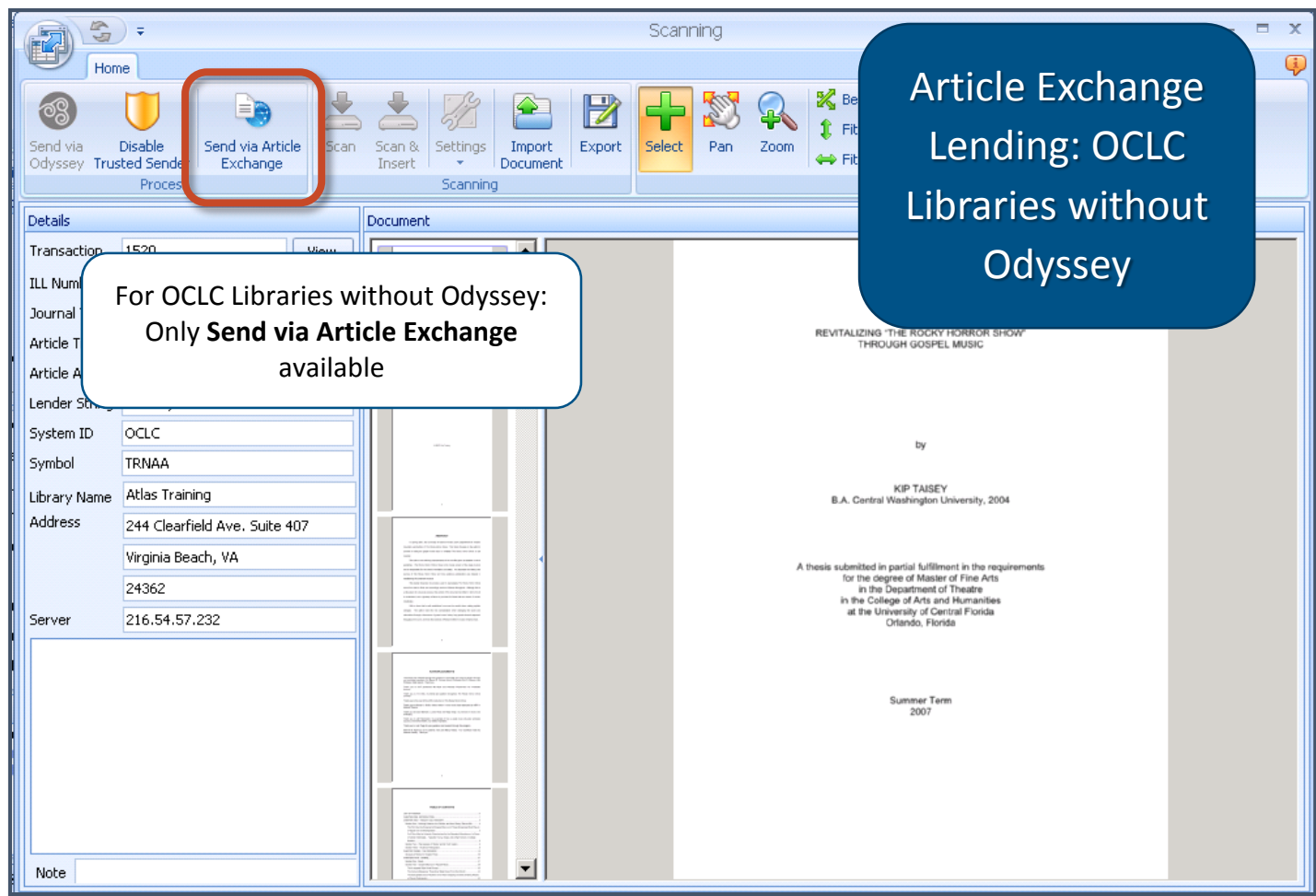


Article Exchange Lending: Odyssey Libraries



For Odyssey Libraries: Both delivery options appear.
Best Practice—Use Odyssey if option is available

Article Exchange Lending: OCLC Libraries without Odyssey



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

OCLE Request

Home

Save Delete Show Transaction Yes No Manual Complete Manual Receive Manual Not Received Manual Return Undo Shipped

Process Conditional Manual Processing

Work Form Detail Local Holdings Collection Data

General Information

ILL	104618329	Borrower	HCD	Req Date	201305
Status	SHIPPED 20130524	Patron	Brunswick, Jo	Rec Date	
OCLC	1782154	Source	ILLiad	Due Date	N/A
Lending String	TRNAA,*TRNAA,TRNAA		Alert	AELURL: http://oc.lc/gRk41 AEPassword: MDGvsvb6	

Bibliographic Information

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	7-00a	ISSN 0032-5562
Verified	<TN:4352><ODYSSEY:206.107.44.153/HCD>		OCLC	DOI	PMID

Borrowing Lending

Ship To Attention Bill To Attention

Ship To Address College of the Holy Cross/ILL-Dinand Library/1 College Street/Wor Bill To Address same

City State/Province City State/Province

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 Process

Scan Scan & Insert Settings Import Document Export

Select Pan Zoom Best Fit Fit Height Fit Width Crop Rotate Deskew Undo Delete

Image

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

B.A.

A thesis sub...

Summer Term 2007

Note

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

Article Exchange Lending: Non-OCLC Libraries

35 - Lending Request

Lending Processing

Cancel Request * Conditionalize Request * Mark Found Mark Found Scan Now Route * Policies Directory Resend Request Odyssey Billing View Send E-Mail Lender

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: Regular Shipping Options: Mail

Billing Account: Doc Type

System Information

ILL Number: OCLC Number: Lending String: Borrower: GENIELIB 1 System ID: LWeb -1 OCLC Status:

Article Info Loan Info Collections Local Holdings Imported Request Copyright In

Journal Title: Whole Dog Journal

Volume/Issue: 35 5

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:

Date Note Type Added By

5/24/2013 2:58 PM	Article Exchange URL: http://oc.lc/l12y5m Article Exchange Password: V7yZbYpC	System	atlas
5/24/2013 2:42 PM	testing article exchange	User	GENIELIB

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: Do: Vo:

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

Article Exchange Lending: Non-OCLC Libraries

Request Finished

Lending Processing

Cancel Request * Conditionalize Request * Mark Found Mark Found Scan Now Route * Policies Directory Resend Request Odyssey Billing View Send E-Mail Lender

Print Request Add to Print Queue Print and Empty Queue Updates System

Detail History OCLC Z39.50 PubMed/Docline

Tracking

Date Changed	Changed To	Changed By
5/24/2013 2:42 PM	Submitted via Lending Web	GENIELIB
5/24/2013 2:42 PM	Awaiting Lending Request Processing	GENIELIB
5/24/2013 2:43 PM	Request in Processing	atlas
5/24/2013 2:44 PM	Awaiting Lending Request Processing	atlas
5/24/2013 2:44 PM	Request in Processing	atlas
5/24/2013 2:44 PM	Awaiting Stacks Searching	atlas
5/24/2013 2:44 PM	In Stacks Searching	atlas
5/24/2013 2:58 PM	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

History

Date Chang

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
1	35	5/24/2013 ...	Transaction	35	genie@atla...	ILLiad

Dear Gene Library,

Your requested article is available at <http://oc.lc/l12y5m>
Use this case-sensitive password: V7yZbYpC

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 757-67-7872.

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

Dear Gene Library,
Your requested article is available at <http://oc.lc/l12y5m>
Use this case-sensitive password: V7yZbYpC
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.
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ARTICLE EXCHANGE CONFIGURATION STEPS—OCLC

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

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

Atlas Article Exchange Demo Videos
<https://training.atlas-sys.com/Course/Details/3126>

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

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**

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 Keys
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

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.
- You will also need to update the following keys in the Customization Manager with the secure URL—i.e. https prefix rather than http
 - LendingWebURL
 - LendingWebLogoutURL
 - WebURL
 - WebLogoutURL

ARTICLE EXCHANGE CONFIGURATIONS—ILLIAD

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

The screenshot shows the ILLiad Web Platform Config interface. On the left is a navigation tree with 'System' > 'WebPlatformConfig' selected. The main content area is divided into two sections:

WebPlatformConfig

ID	NVTGC	APIKey	BaseWebServiceUrl	Description
2	ILL	b42b4e71-7dfd-4f9e-9239-fd2655b65464	https://training2.atlas-sys.com:444/illiadwebplatform/	ILLiad web platform

Edit Row

ID	
NVTGC	ILL
APIKey	b42b4e71-7dfd-4f9e-9239-fd2655b65464
BaseWebServiceUrl	https://training2.atlas-sys.com:444/illiadwebplatform/
Description	ILLiad web platform

- 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)
 - **Email Templates** Ribbon
 - Select **ArticleExchangeLendingNotification** from **Edit** drop down
 - Make edit as desired

MODIFIED BORROWING LOAN WORKFLOW

- See workflow chart below
- New **In Transit to Customer** status prior to **Awaiting Customer Contact**
- Assists with delayed delivery when using pick-up locations
- Update at pick-up location with batch processing form in Client or in WebCirc
- Times notification with arrival of item at pick-up location
- Automates email notifications
 - **Awaiting Customer Contact** temporary, transitional status for email notifications
 - Sent every 5 minutes
 - **Contact Customer** client form is modified
 - Includes only **Notify via Print** or **Notify via Phone** for manual processing
 - Minor changes to Phone processing
 - Button to clear
 - Double-click will open record
- New **default email templates**
 - See the Customization Manager **Email Templates Ribbon** to edit
- Can employ **routing rule** to skip **In Transit to Customer** status if not needed

CUSTOM FLAGS & SPECIAL MESSAGES

- **Set aside** specific items for special review or unique processing **without changing request status**
- Flag properties

- Applied independent of status
- Do not display to patron
- Searchable in custom search
- Can apply multiple flags to the same request
- Use in all modules
- Configure **client or server Addons** to utilize custom flags
- **OCLC Special Messages** display as custom flags
 - System Assigned
 - Display like Others
 - System Checked Every 12 Hours
 - Borrowing
 - OCLC Special Message: Overdue
 - OCLC Special Message: Received?
 - OCLC Special Message: Borrower Lost
 - Lending
 - OCLC Special Message: Complete?
 - OCLC Special Message: Not Received
 - OCLC Special Message: Lender Los
- Create Flags
 - Customization Manager: System | Custom Flags | CustomFlags
 - Click **New Record**
 - Add flag name
 - Click into ID field
 - ID added automatically
 - Save
- Add or remove flags with **Remove Flag** option
 - On the **Request Form**
 - From **Grid List** view of requests in queue
- Open list of flags from **Queue**
 - Indicated with flag icon

CLONING REQUESTS

- **Create new version** of an existing request for the same user or for another user
- **Notes** and **history** *NOT* cloned
- Available in all modules
 - Limited in Lending to requests with SystemID **Other** or **LWeb**
- **Citation information** cloned
- Functionality in **Client** and in **Web** for patrons

FIFTEEN SYMBOL LENDER STRING

- Borrowing
 - Allows entry of up to 15 symbols in lending string
 - All symbols will display on **Check-In from Lending Library** workspace
- 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

LOG-IN TO ILLIAD WEB AS PATRON LOG IN

- Permissions required in Staff Manager
 - Not allowed by default
- Access from User Record in Client
- Ends user's session
- Logged in **Event Log** (on **System** Ribbon) when used
- Remote auth users need additional Customization Manager Key
 - System | General | StaffProxyWebURL

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 display as User ID

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

ODYSSEY HELPER AUTO MODE

- Send documents through Odyssey Helper **without any staff intervention**
- Enable with **one click**
- Any files saved in the **specified Odyssey Helper** folder sent automatically
- **Transactions** updated and completed automatically
- **One machine** required to be logged-in to Odyssey Helper
- **Staff User** logged-in recorded in **tracking** history

CHANGE REQUEST TYPE FOR LENDING

- Lender can **change a request type** before updating to Shipped
 - e.g. If a lender decides to fulfill an article request as a loan
- Change reflected to **Borrower**
- Both requests (**ILLiad & OCLC**) reflect change

OCLC TERMINOLOGY

- New **OCLC-WorldShare ILL statuses** display in ILLiad
- Some differences between lending view and borrowing view
- Example

WRS	WSILL Borrow	WSILL Lend
Pending	Submitting	New
Shipped	In Transit	In Transit

<http://www.atlas-sys.com/training/lending/ILLiadtoOCLCchart.pdf>

VIEWING HOLDINGS INFORMATION

- Days to Respond values from the OCLC Policies Directory viewable on the Holdings form
- Display Legend
 - Superscript
 - 8 days = 2

- 12 days = 3
- 16 or 20 days = asterisk
- Colors
 - 8 days = blue
 - 12 days or more = red

CONVERTING ARTICLE EXCHANGE DOCUMENT TYPE

- Converted Odyssey scanned articles to PDF before sending through Article Exchange.
- Dropdown option on **Send via Article Exchange** button to select format

DISPLAY CHANGES

- **Borrowing Customer Contact** form modified to only send print and phone
- Borrowing Request form **ribbons**
 - **Printing buttons** moved to a new Printing tab page on the ribbon
 - **Copyright buttons** moved to a new Copyright tab page on the ribbon
- **ILLiad version number** (e.g. 8.5.0.0) removed from the Client title bar
 - Still viewable by clicking the **ILLiad icon, Options, then Resources.**

ILLIAD AND AEON INTEGRATION

- Integrated lending requesting for Special Collections via Aeon
 - Sends ILLiad request to Aeon for processing
 - Creates new request in Aeon
 - Allows tracking in both systems