# ILLiad Update

New features, web client, and what's ahead

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**ILLiad User Club**
September 1, 2026 • Online via Microsoft Teams

ILLiad

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# Welcome!

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Access Services Program Manager

Contact me at sjuel@atlas-sys.com for questions about:

- ILLiad Roadmap
- New Integrations/Enhancement Ideas
- Custom Work
- Etc.

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# ILLiad v10 Update

# ILLiad v10

Features included in the ILLiad v10 release:

### Web Client
Processing, searching, Web Circ, and SSO

### Support for Multiple Renewals
Removing the 1 renewal limit restriction

### MSI Installer Updates
Making it easier to deploy the client installer updates

### Default FOLIO, Alma, & WorldShare Z39.50
Updated Z39.50 profiles

### DOCLINE API
No more browser interface for more seamless workflows

### Article Exchange OCR API
Streamlined document delivery and language handling

### ISO 18626 Support
International interlibrary loan protocol support

### Enhanced Stability & Performance
On .NET 10, with 50+ bug fixes and optimizations

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# ⚠ Critical Update Requirements

## Before You Upgrade

Review these requirements carefully to ensure a smooth transition.

### ✓ System Requirements

- Windows 11 for client workstations
- Windows Server 2019+ for self-hosted servers
- SQL Server 2019+ for self-hosted servers
- .NET 10 Runtime (auto-installed)
- Configuration of UTF-8 for logging

### ✓ Action Items

- Back up print templates to web client (Requires Staff Manager Access permissions)
- Update addons due to Nlua scripting changes (ReShare and IDS addons specifically impacted)

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# Benefits of OCR Integration

Automatic accessibility and searchability for delivered documents

### Improved Accessibility

Documents become searchable with embedded text. For full accessibility compliance, work with your institution's accessibility office for any additional requirements.

### Enhanced Searchability

Patrons can search within documents, find specific terms, and copy text for citations and research notes.

### Automated Process

No additional staff effort required. OCR processing happens automatically in the background for all eligible documents.

Available to all ILLiad users including self-hosted sites

# How It Works

Setup, compatibility, and processing details

## Setup & Configuration

- Automatically enabled with ILLiad v10.0 update
- No configuration required to get started
- Option to opt out if desired
- Configurable accuracy threshold for staff flagging

## Compatibility

Works with any integration using Odyssey or Article Exchange:

- OCLC
- RapidILL
- And more...

## Odyssey Delivery

- Documents still deliver via Odyssey
- Trusted sender functionality preserved
- OCR runs via Article Exchange, returns to Odyssey

## Smart Processing

- Checks each page individually
- Only OCRs pages that need processing
- Partially OCR'd documents handled automatically
- No duplicate processing of existing text

# Language Detection & Accuracy

How language is determined and quality is monitored

## Borrowing & Lending Requests

- Lender sets the language on their side
- OCLC requests: language from WorldCat record
- Exploring additional ways to auto-populate
- Defaults to English when not specified

## Document Delivery

For Document Delivery, we recommend:

- Include language in OpenURL from your catalog
- Add language as part of request review process
- Defaults to English if not specified

## Cover Sheet Recommendation

Since the cover sheet is added after OCR processing, we recommend OCR'ing your cover sheet separately and uploading it to ILLiad. This prevents language detection issues if the cover sheet is in a different language than the article.

## Accuracy Monitoring

• After OCR completion, system checks accuracy against configurable threshold • Low accuracy documents flagged for staff review • Staff can determine if corrections are needed

# Article Exchange OCR — ILLiad Workflows

4 updated workflows | Searchable PDFs for patrons | Automated, with an optional alternative-tool route

## What Changes in Your ILLiad Workflows

- ILLiad will attempt to populate language based on WorldCat records for OCLC requests
- OCR succeeds? Searchable PDF delivered. OCR fails? Original is delivered as fallback.
- Low-accuracy results flagged for staff review before delivery

## Benefits

### Searchable PDFs for Patrons

Patrons receive text-searchable documents, improving accessibility and usability

### ⚙ ILLiad Automation Pipeline

- ILLiad downloads the OCR'd file from OCLC Article Exchange
- Odyssey renames the file to match the expected filename and delivers it via Odyssey

### ⚠ Coversheet Note

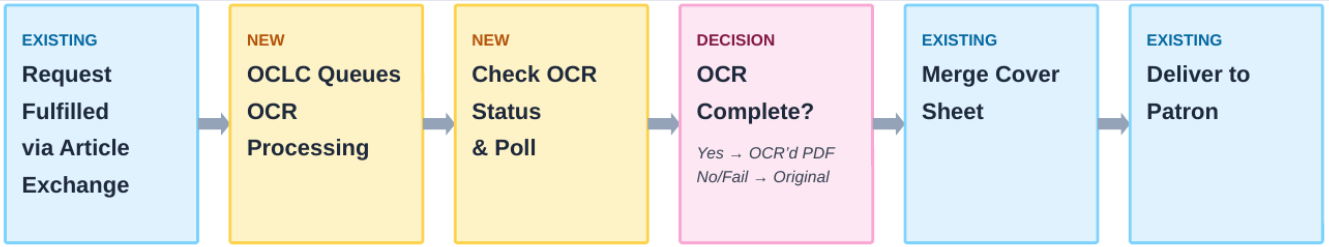
Added **after** OCR — prevents language detection errors in the OCR engine

- **OCR your coversheet separately** and upload it — do not include it in the document sent for OCR

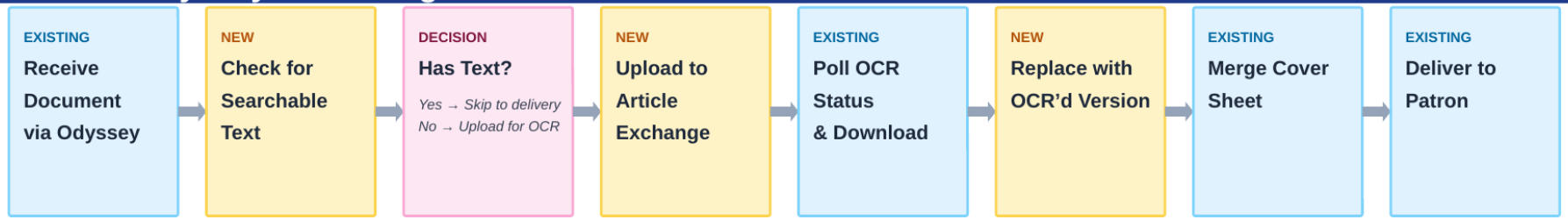
# ILLiad OCR — Updated Workflows

EXISTING steps unchanged — NEW steps added for OCR polling and processing

## Workflow 1: Native AE Borrowing




## Workflow 2: Odyssey Borrowing

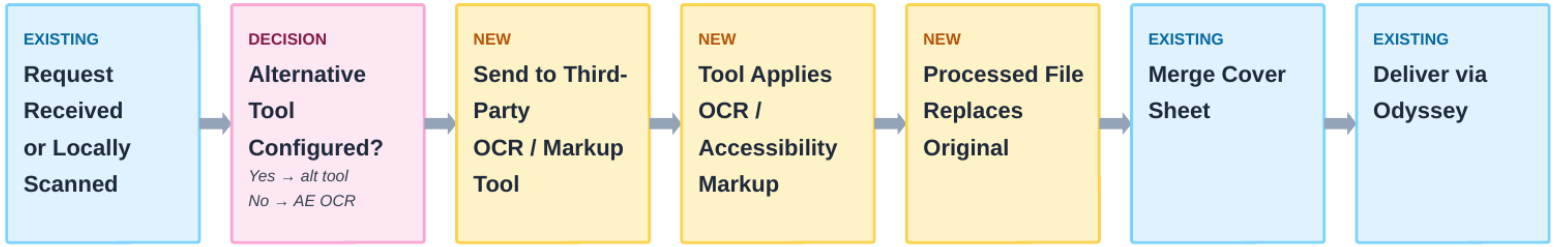



## Workflow 3: Local Scan Delivery

# ILLiad OCR — Optional Alternative Tool

Route requests to a third-party OCR / accessibility markup tool — configured in the Customization Manager and supported via the API

## Workflow 4: Route to an Alternative OCR / Accessibility Tool




### How it's configured

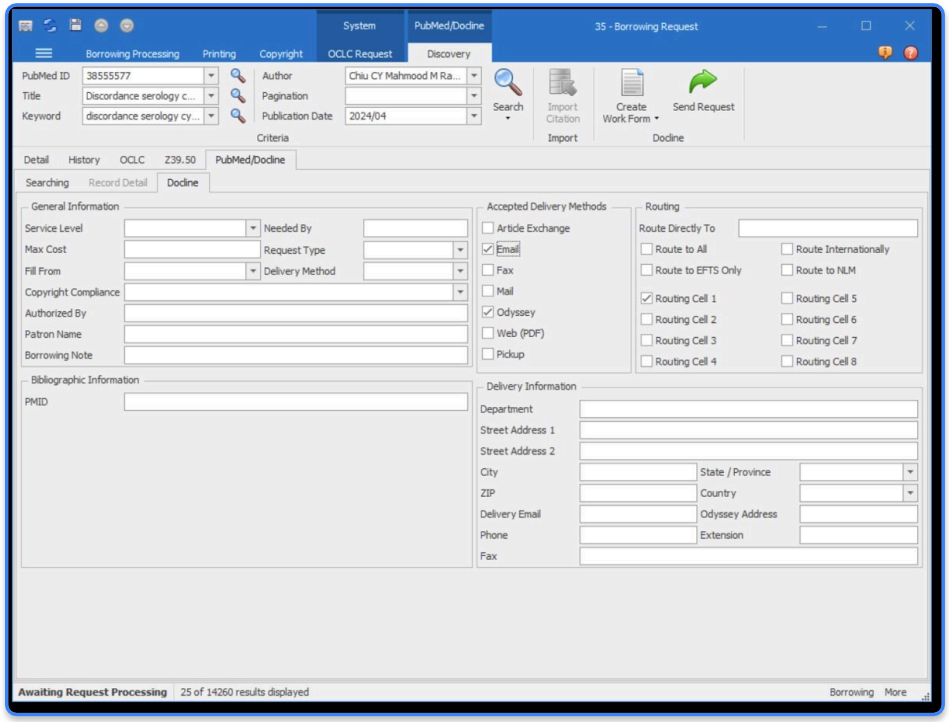
- Set the OCR / accessibility target per site in the Customization Manager routing key
- Also supported as a workflow through the ILLiad API for programmatic routing
- Hand documents to a third-party tool such as ABBYY, Adobe, or another remediation service

### Delivery, scope & fallback

- Delivery still goes through Odyssey — the processed file is renamed to the expected filename and delivered via Odyssey, trusted-sender preserved
- Applies to borrowing and document delivery; lending uploads to Article Exchange by default in ILLiad 10
- Non-blocking: if the alternative tool fails or times out, the original is delivered as-is

# DOCLINE API Integration

Direct API-based DOCLINE workflows — no more browser interface required




## Borrowing — Submit Requests from ILLiad

Search PubMed by PMID, title, author, or keyword directly from the request form. Import citation data into the transaction and submit PMID, journal, book, or manual requests with configurable routing cells and delivery preferences — all without leaving ILLiad.

## Lending — Import Requests Automatically

Import pending DOCLINE lending requests directly into ILLiad with automatic field translation and duplicate detection. Requests are categorized by service level (Normal, Rush, Urgent Patient Care) and routed to the appropriate queues. Send shipped and cancelled status updates back to DOCLINE.

## No More Browser — Everything Stays in ILLiad

PubMed search, citation import, request submission, lending imports, receipt confirmation, and status updates all happen through the API — no more switching to the DOCLINE website.

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# Web Client Features

### Single Sign-On

SSO with multi-site SAML / IdP support

### Web Circulation Module

Manage circulation directly from the web

### Advanced Search

Indexed search across 100+ fields with relevance ranking, boolean operators, and date range filters

### Granular Permissions

User permissions down to field level

### Layout Editor

Customize layouts to fit your workflow

### Print Templates

Field customizations and print templates

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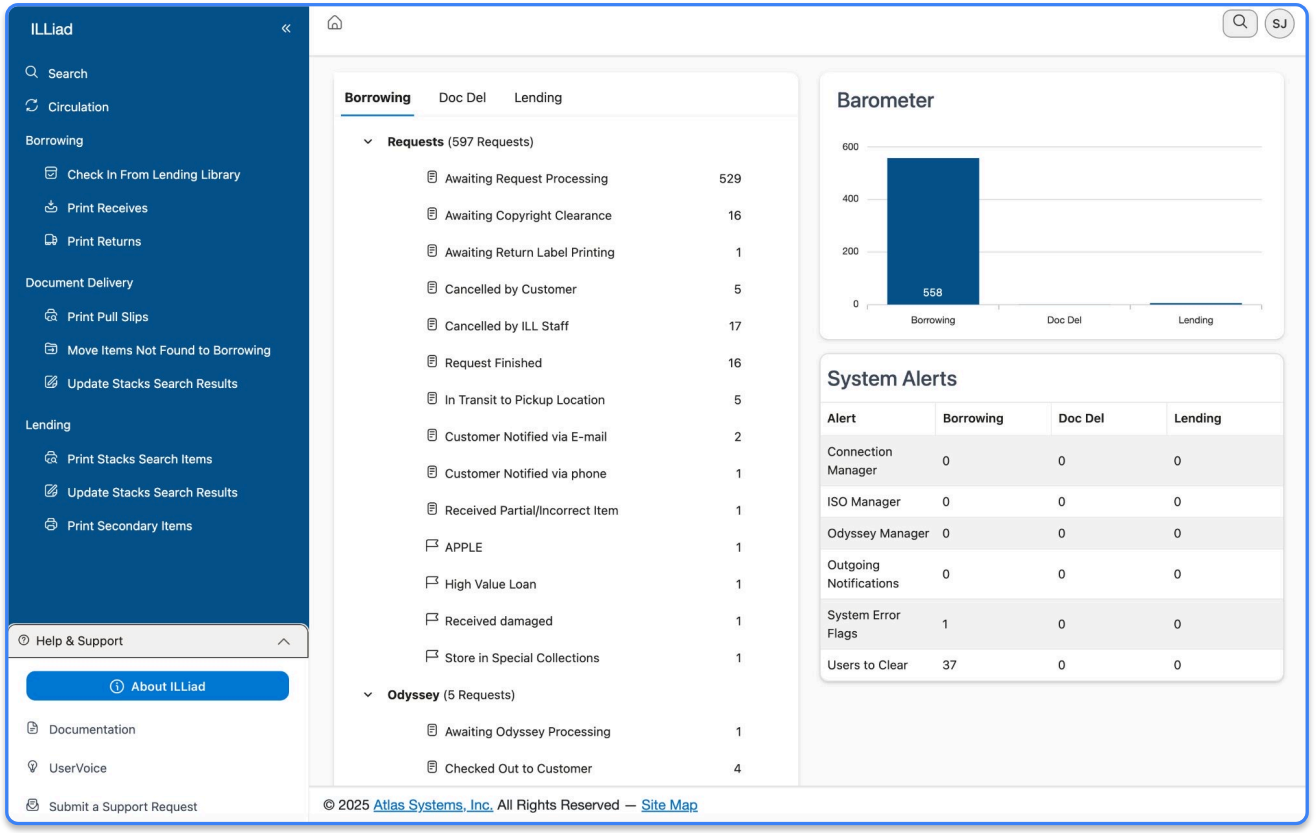
# Web Client — Main Dashboard

Browser-based processing with real-time queue management, status barometer, and system alerts




**Sidebar Navigation**
Borrowing, Lending, Doc Del workflows

**Request Queues**
Status counts with expandable groups

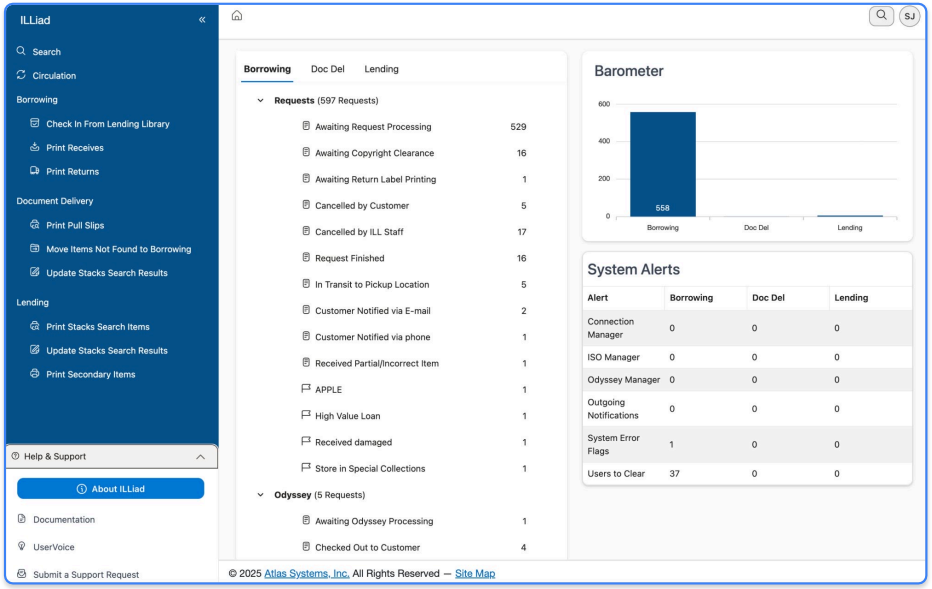
**Barometer**
Visual overview of request volume

**System Alerts**
Service health at a glance

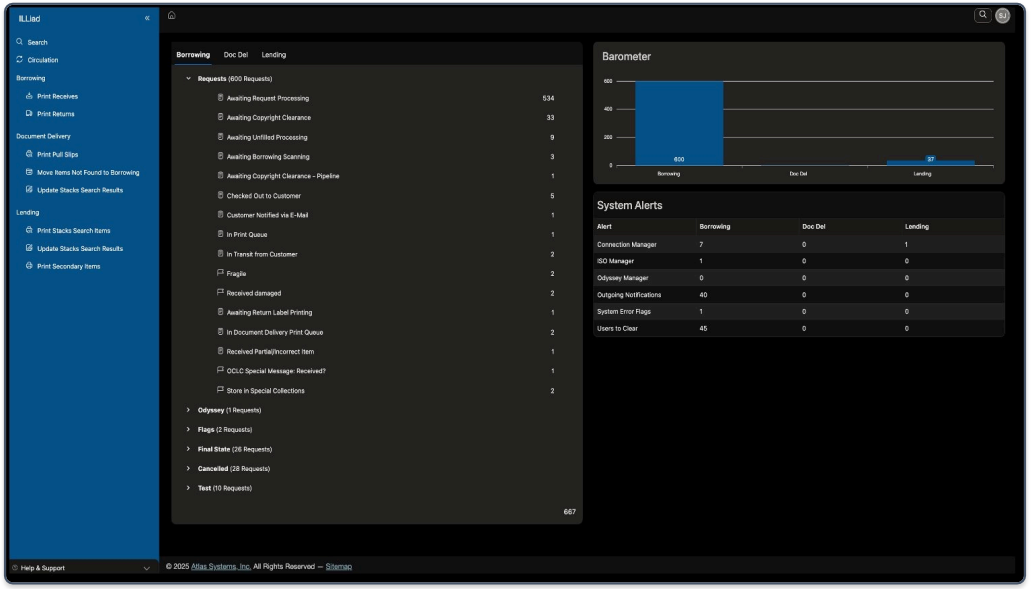
# Web Client — Theme Support

Light and dark modes with browser zoom support for accessibility

## Light Theme




## Dark Theme

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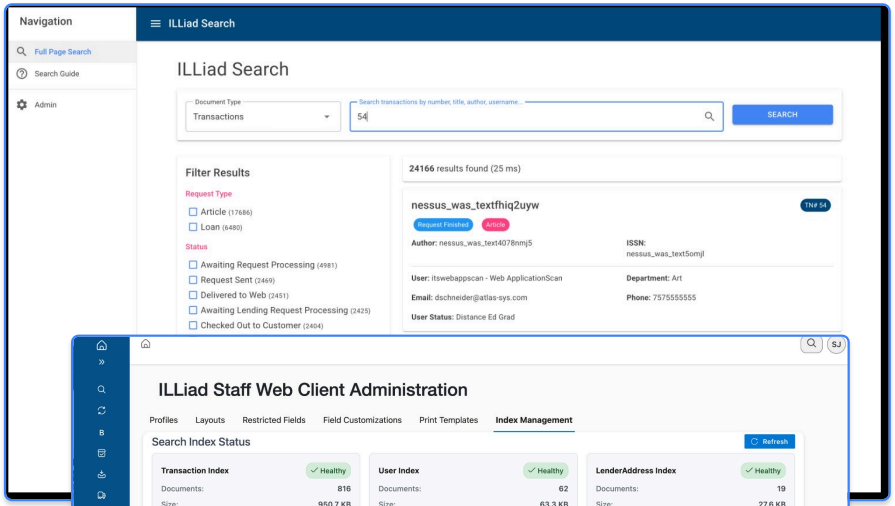
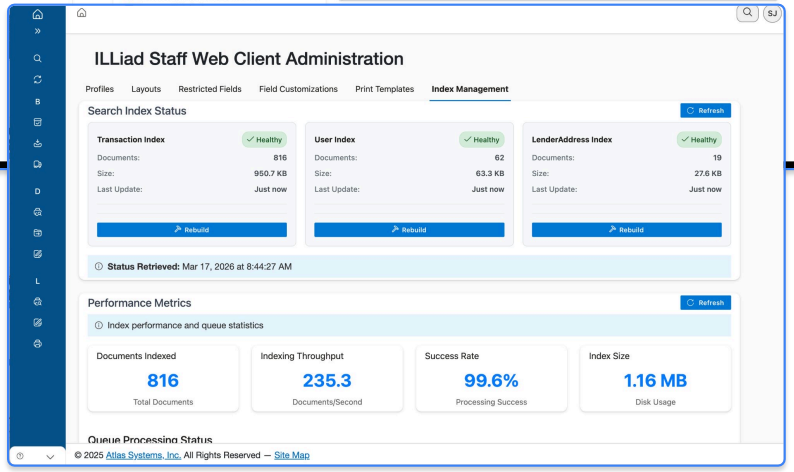
# Web Client — Advanced Search

New Lucene-based indexing replaces direct SQL queries for faster, smarter search




## Before: Direct SQL Queries (Desktop Client)

Every search ran a SQL query directly against the production database. Limited to a few predefined fields, no relevance ranking, no faceted filtering, and slow on large datasets. Complex searches required custom SQL knowledge.

## Now: Lucene-Based Indexing Service (v10)

A dedicated ILLiad Indexing Service runs as a Windows service, building and maintaining Lucene indexes for transactions, users, and lender addresses. Indexes update every 60 seconds in smart batches of up to 1,000 records. Searches hit the pre-built index instead of the database — sub-second results across 100+ fields with zero database load.

## ✅ What You Get

**Relevance ranking** — TN and ILL# boosted highest, then usernames, then titles

**Faceted filtering** — Narrow results by status, type, department after searching

**Boolean + wildcards** — AND, OR, NOT operators and trailing wildcard support

**Real-time fallback** — Automatic SQL fallback if index is rebuilding

**Index management** — Health monitoring, rebuild, and performance metrics in Staff Admin

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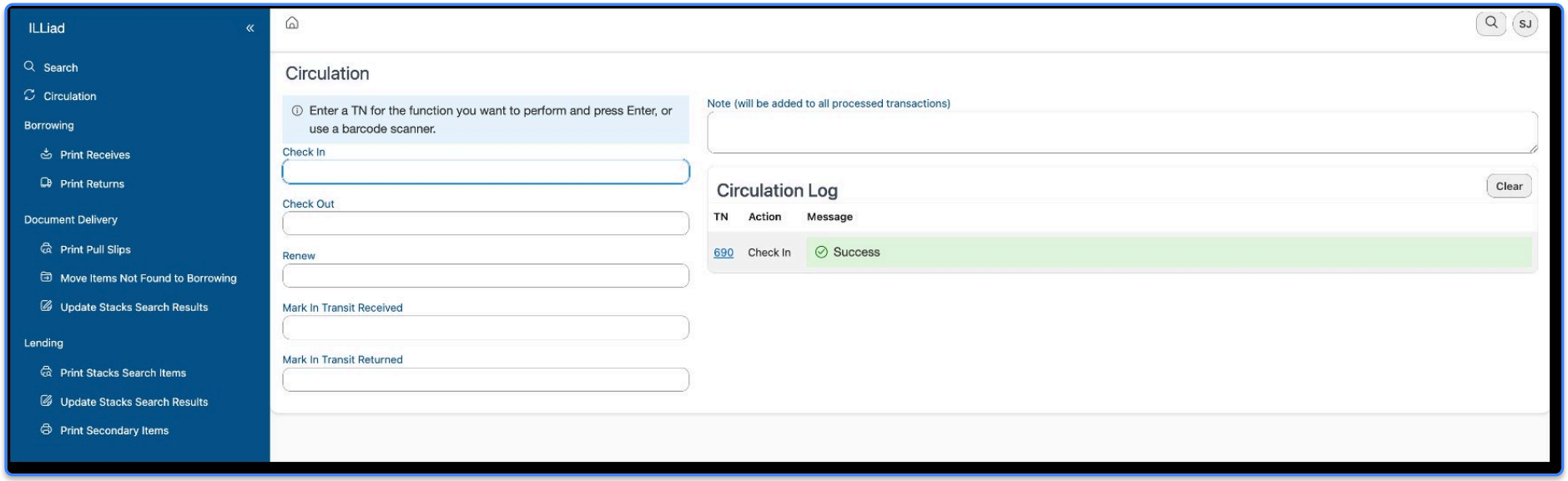
# Web Client — Web Circulation

Check in, check out, renew, and manage transit — all from the browser with barcode scanner support




**Check In / Check Out**
Scan or enter TN to process

**Renew / Transit**
Mark received and returned

**Circulation Log**
Activity history with status

**Transaction Notes**
Add notes during processing

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# Thank You!

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