ILLiad Update

New features, web client, and what's ahead

Sara Juel
Access Services Program Manager • Atlas Systems

ILLiad's Birthday Event
March 17, 2026, • 1:00 – 1:30 PM EDT • Online via Microsoft Teams

ILLiad

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Welcome!

Sara Juel
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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Release Updates

DOI Resolver in Web Pages

DOI & PubMed ID Lookup

Patrons enter a DOI or PubMed ID to auto-populate citation details in the article request form, reducing manual entry errors.

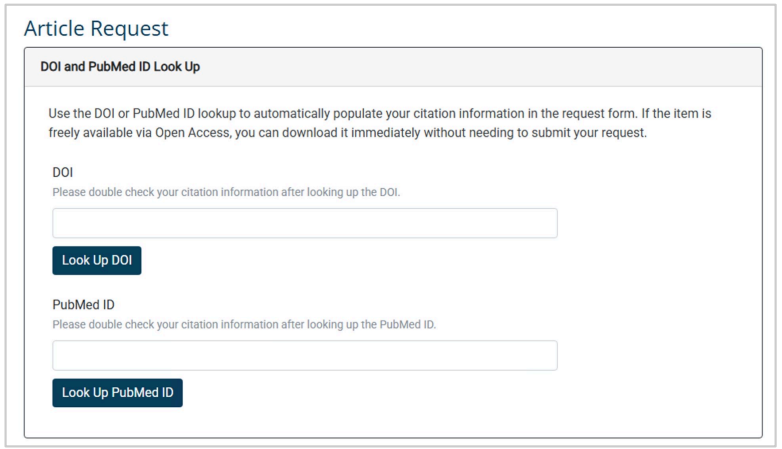
Open Access Detection

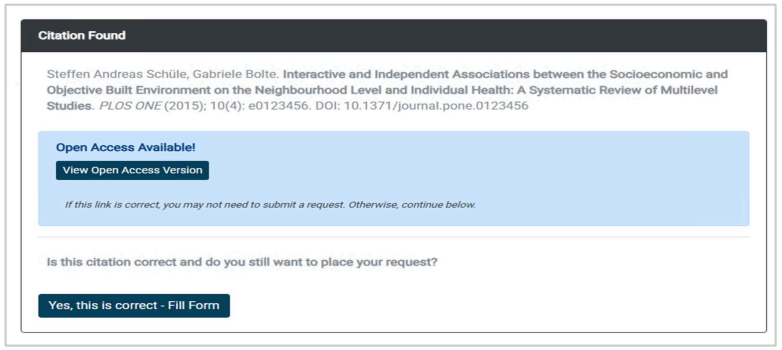
If freely available via Open Access, patrons see a direct link and can download immediately without submitting an ILL request.

Citation Confirmation

Retrieved citation details are shown for patron verification before form submission.

17 **Deep dive later today!** Session 2 at 3:30–4:00 PM





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Upcoming ILLiad v9.2.x Hot Fix

These fixes will also be included in ILLiad v10

OAuth Support

- **Microsoft is retiring Basic Authentication for Exchange Online email**
- Microsoft OAuth and Google OAuth is being added as a supported alternative for ILLiad email delivery
- Libraries using Exchange Online will need to switch from Basic Auth to OAuth
- Configuration instructions will be provided with the release

Multi-Site SAML / IDP Support

- **Supports multi-site shared servers where each site uses a different Identity Provider (IDP)**
- Configured via the ILLiad SAML Module
- Each site on the shared server can authenticate independently through its own IDP
- Eliminates the requirement for all sites on a shared server to use the same SSO provider

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ILLiad v10 Update

ILLiad v10

Features included in the ILLiad v10 release:

Web Client
New web client with processing, searching, and Web Circ

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
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 8.0 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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Article Exchange OCR — ILLiad Workflows

3 updated workflows | Searchable PDFs for patrons | No manual steps or local software

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

📅 **Deep dive later today!** OCR with Article Exchange API — Session 2 at 2:45–3:15 PM

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

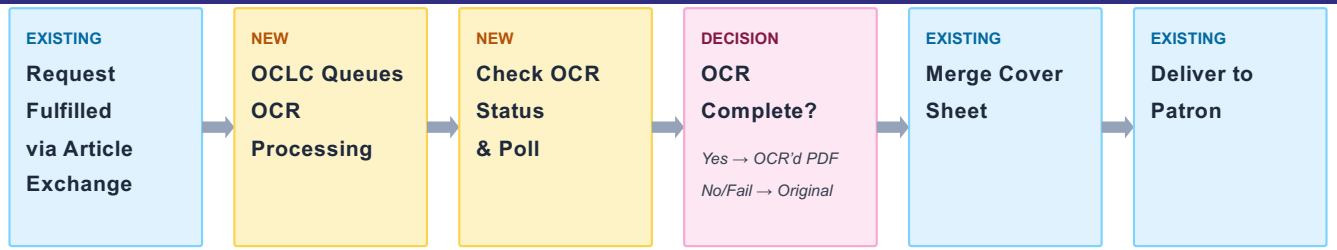
Added **after** OCR — prevents language detection errors in the OCR engine

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

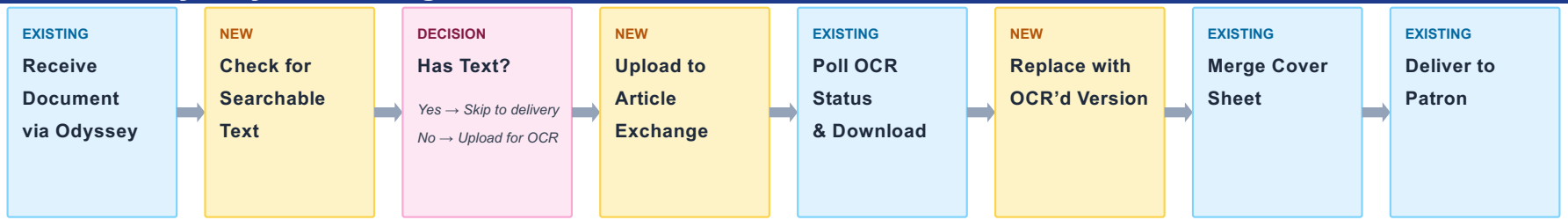
ILLiad OCR — Updated Workflows

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

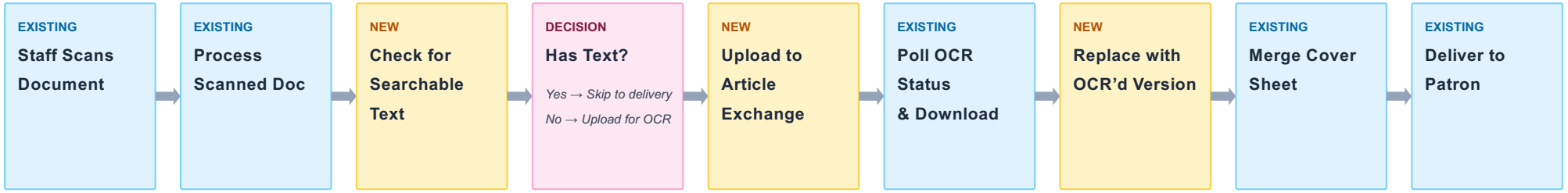
Workflow 1: Native AE Borrowing



Workflow 2: Odyssey Borrowing

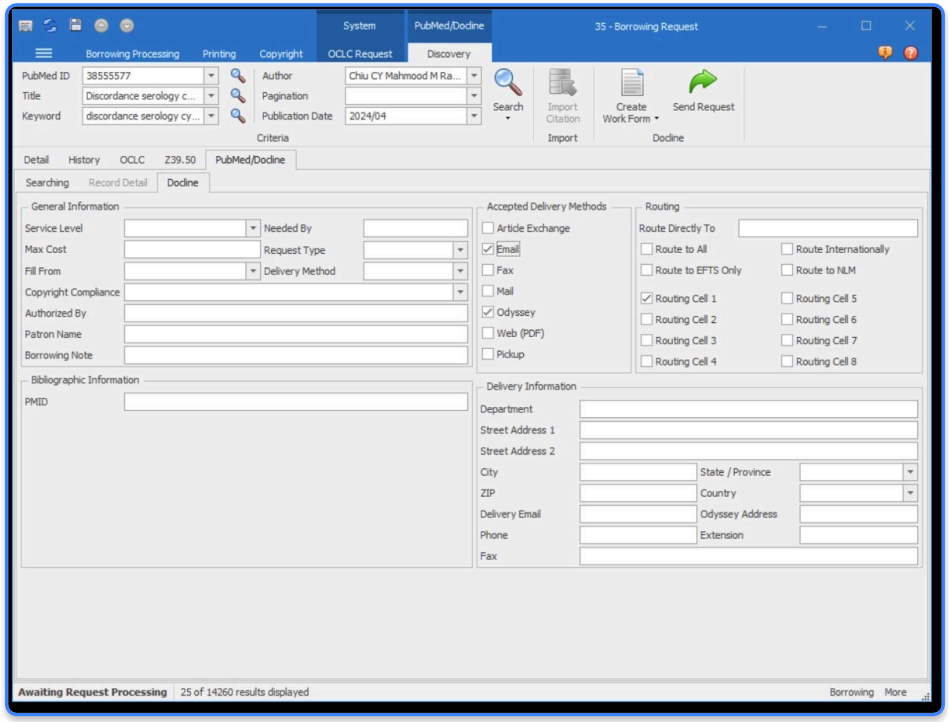


Workflow 3: Local Scan Delivery



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

Streamlined authentication with SSO 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 Processing

Lending Workflow

- Printing Stack Search Items
- Update Stack Search Results
- Post Secondary Items

Borrowing Workflow

- Check-in From Lending Library
- Print Receives and Returns

DocDel Workflow

- Print Pull Slips
- Move Items Not Found to Borrowing
- Update Stack Search Results

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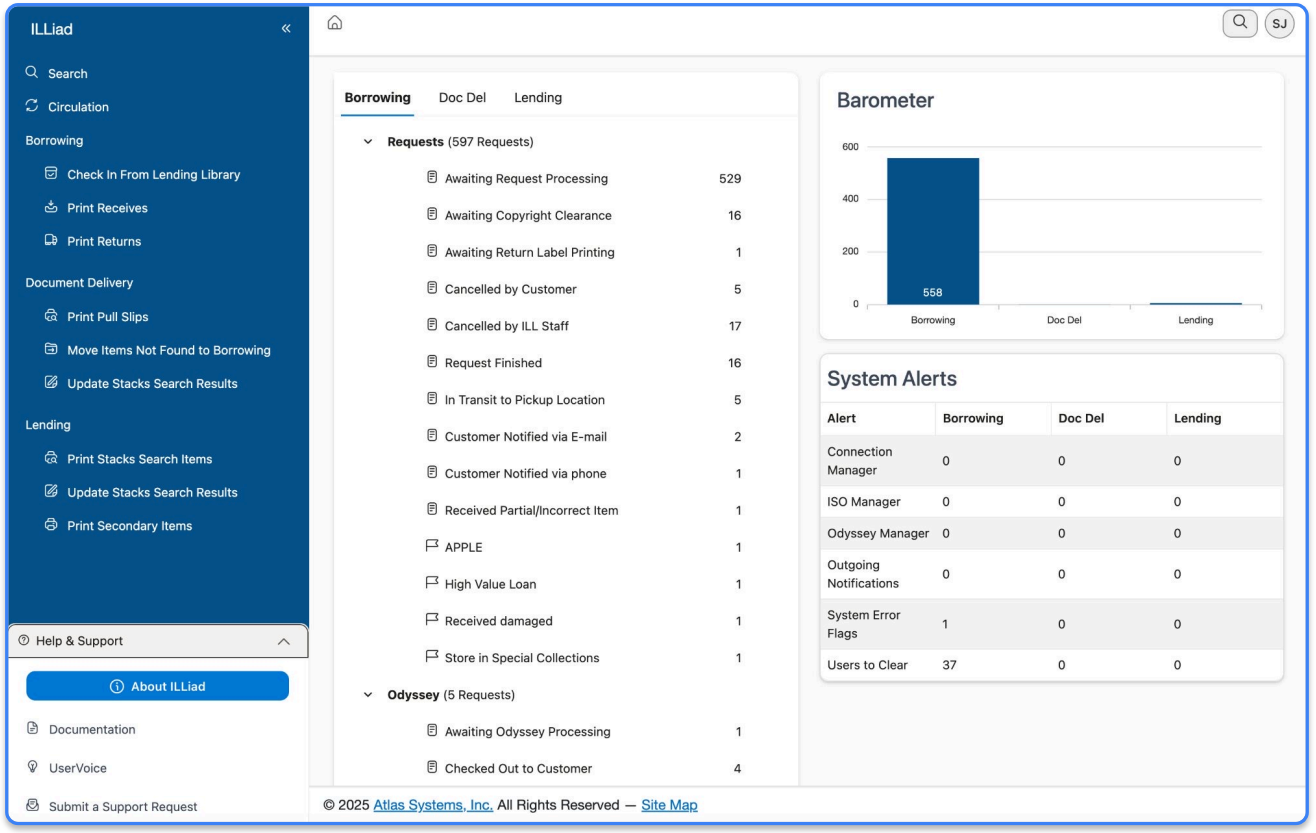
Web Client — Main Dashboard

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

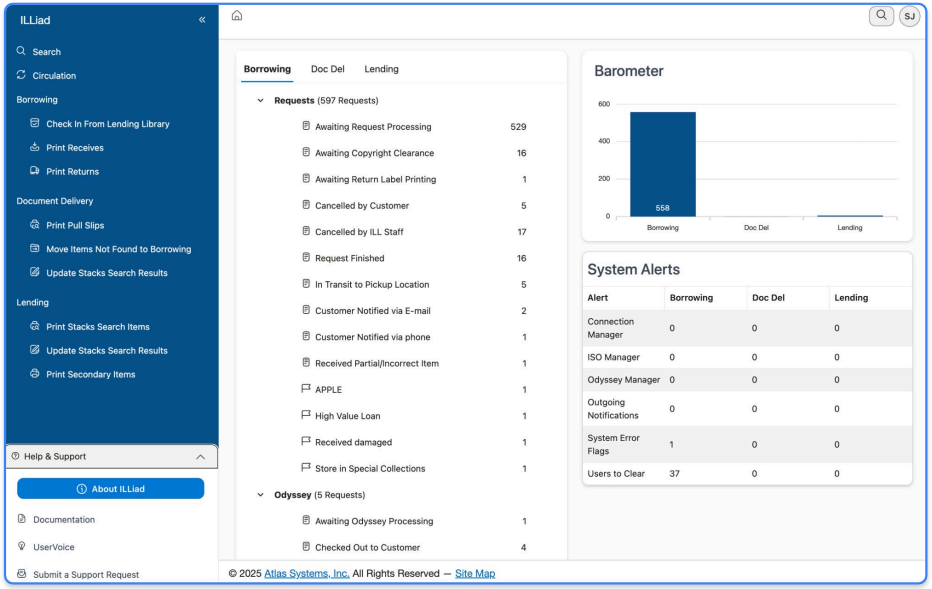
Barometer
Visual overview of request volume

System Alerts
Service health at a glance

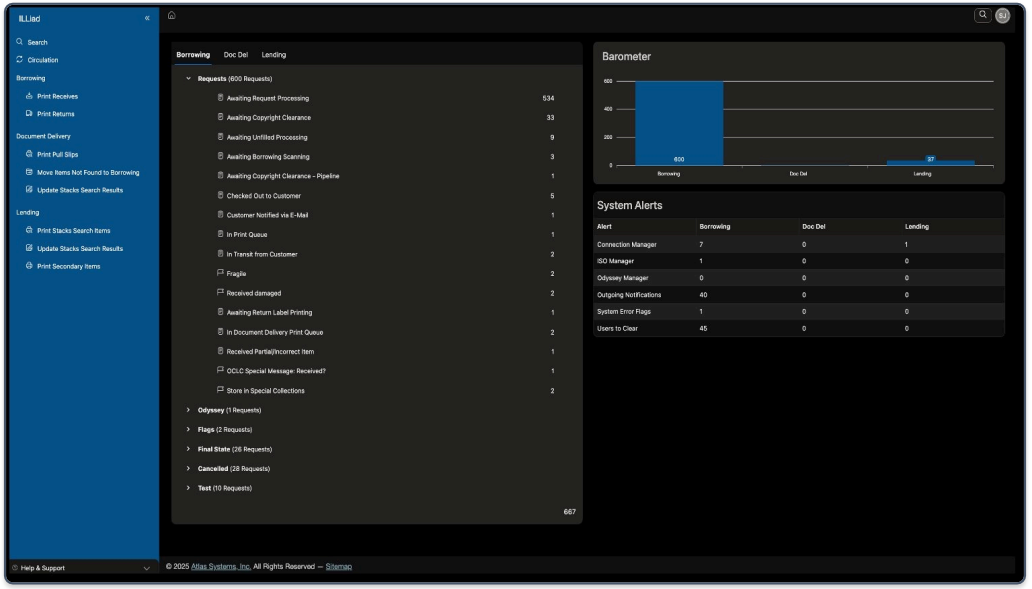
Web Client — Theme Support

Light and dark modes with browser zoom support for accessibility

Light Theme



Dark Theme



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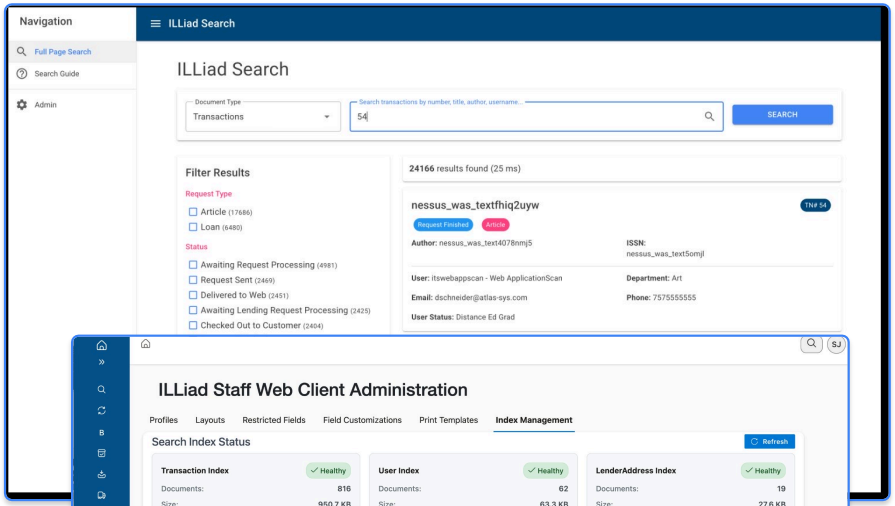
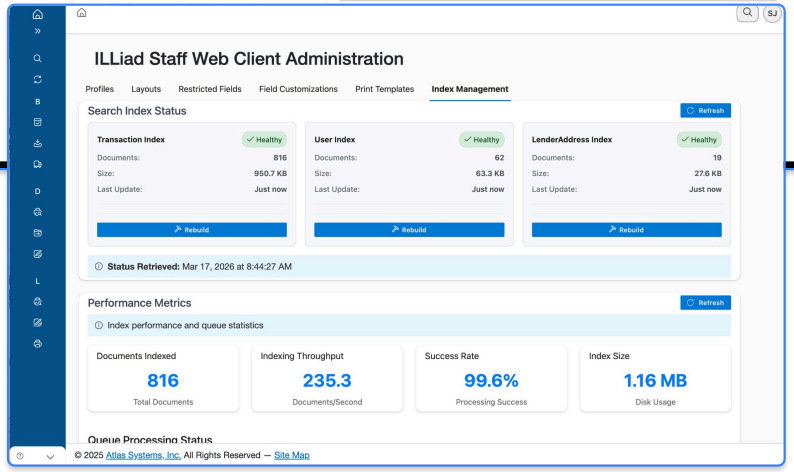
Web Client — Advanced Search

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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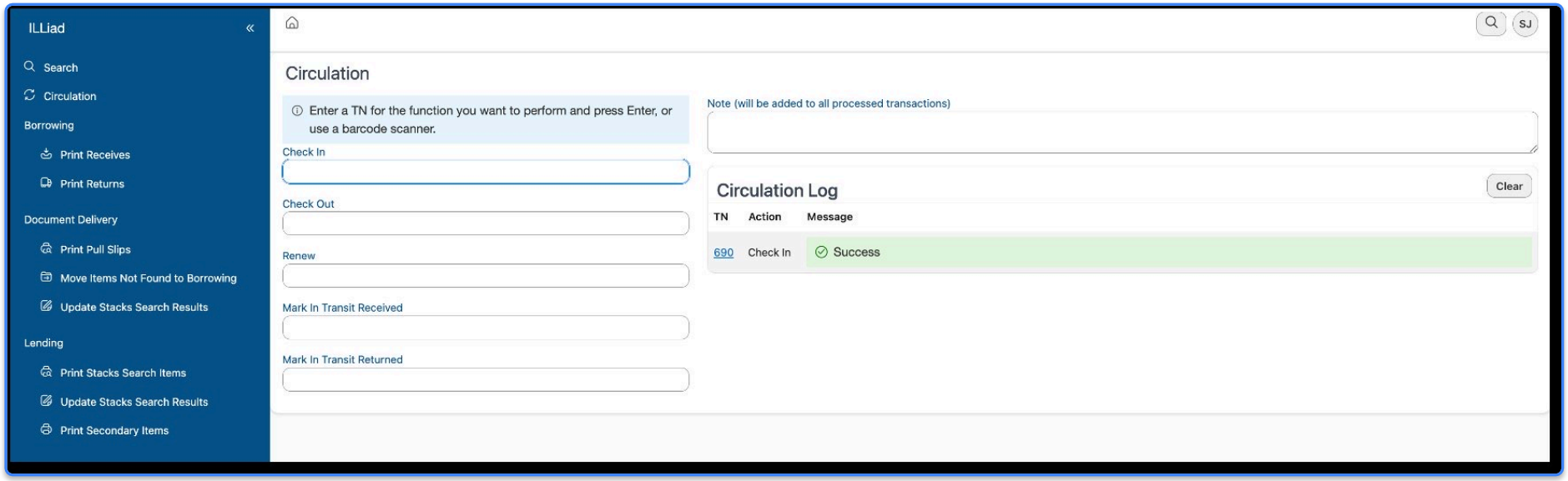
Web Client — Web Circulation

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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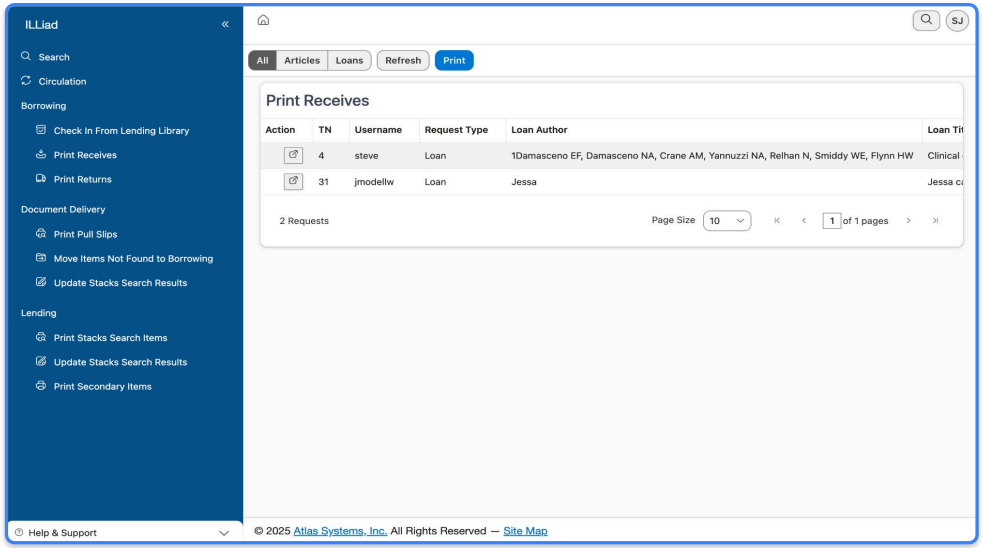
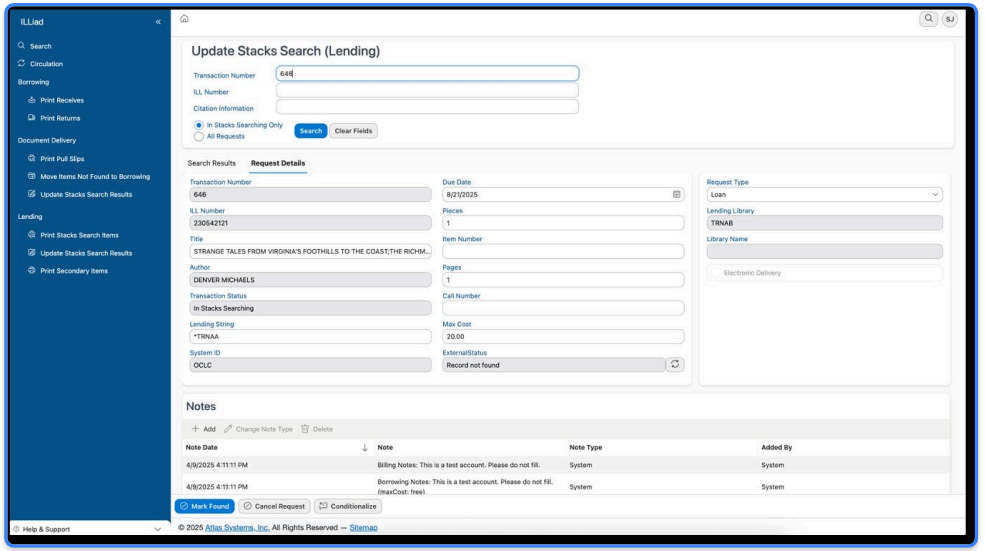
Web Client — Borrowing & Lending Processing

Print receives and returns, update stacks search, and manage requests directly in the web client

Print Receives



Update Stacks Search



Borrowing: Check-in From Lending Library • Print Receives • Print Returns **Lending:** Print Stacks Search Items • Update Stacks Search Results • Print Secondary Items
Doc Del: Print Pull Slips • Move Items Not Found to Borrowing • Update Stacks Search Results

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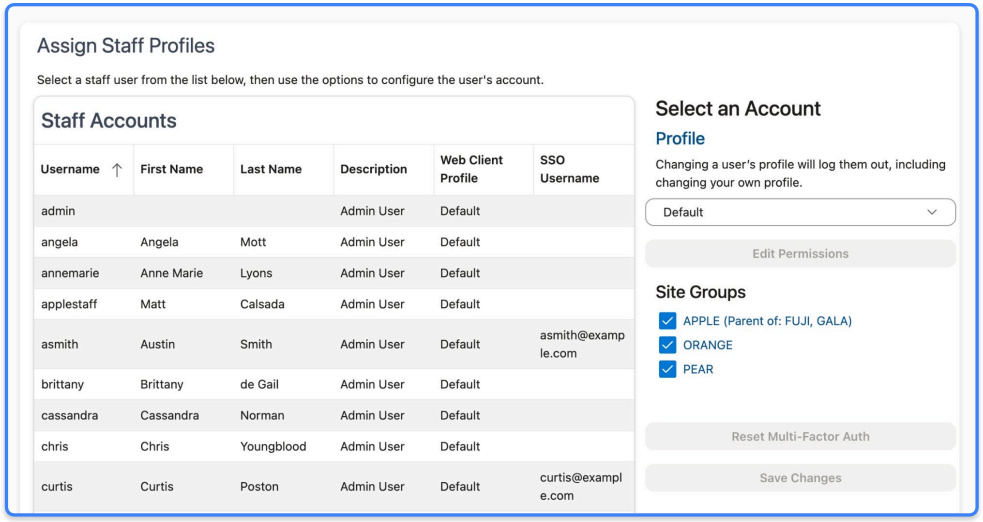
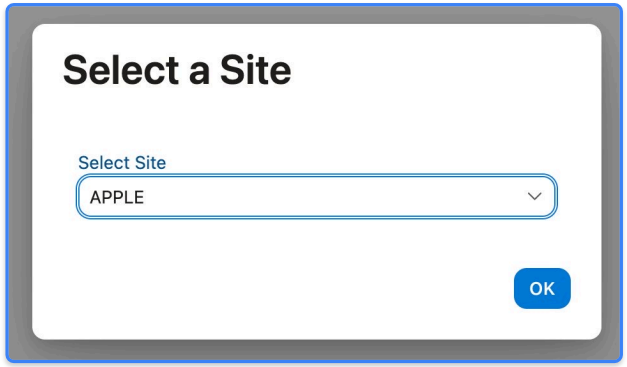
Web Client — Shared Server Management

Multi-site switching, staff profiles, and per-site administration from a single interface

Staff Profiles & Site Groups



Change Site & Per-Site Admin



Switch sites from the user menu without logging out • **Assign profiles** with granular permissions and site group memberships per staff account

Per-site admin for print templates, restricted fields, field customizations, and layouts • **Multi-Site SAML** supports different Identity Providers per site on the same shared server

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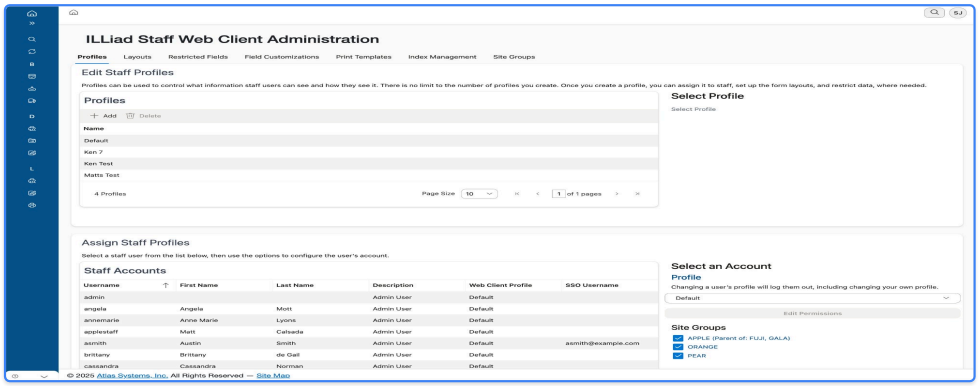
Web Client — Staff Administration

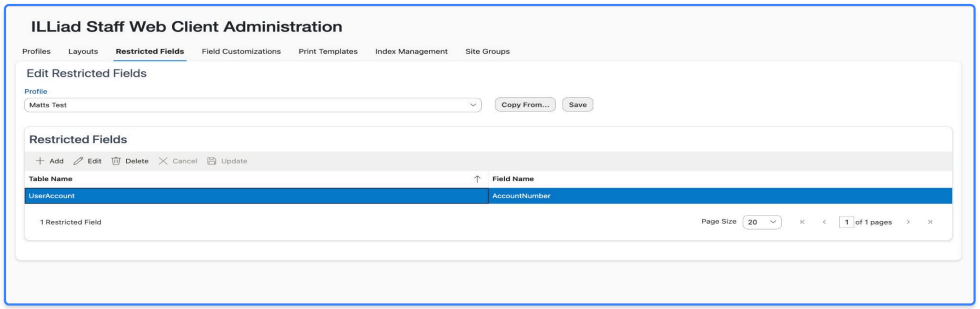
Profiles, permissions, layouts, restricted fields, and print templates — all configurable per site

Profiles & Staff Accounts

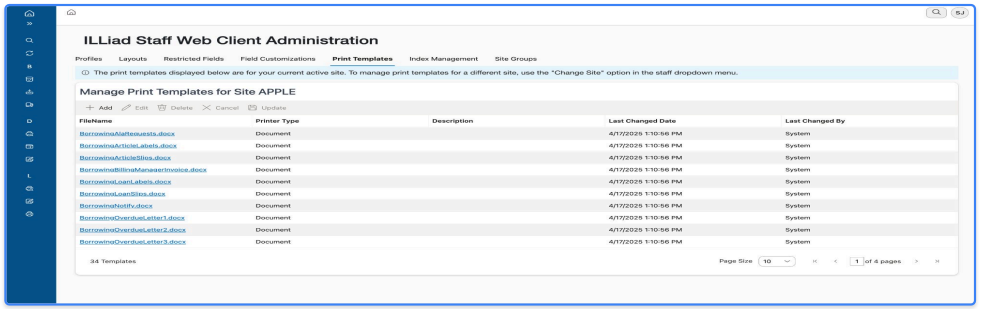


Granular Permissions

Restricted Fields



Print Templates



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Thank You!

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