

ILLiad Shutdown Procedures for a Self-Hosted Server

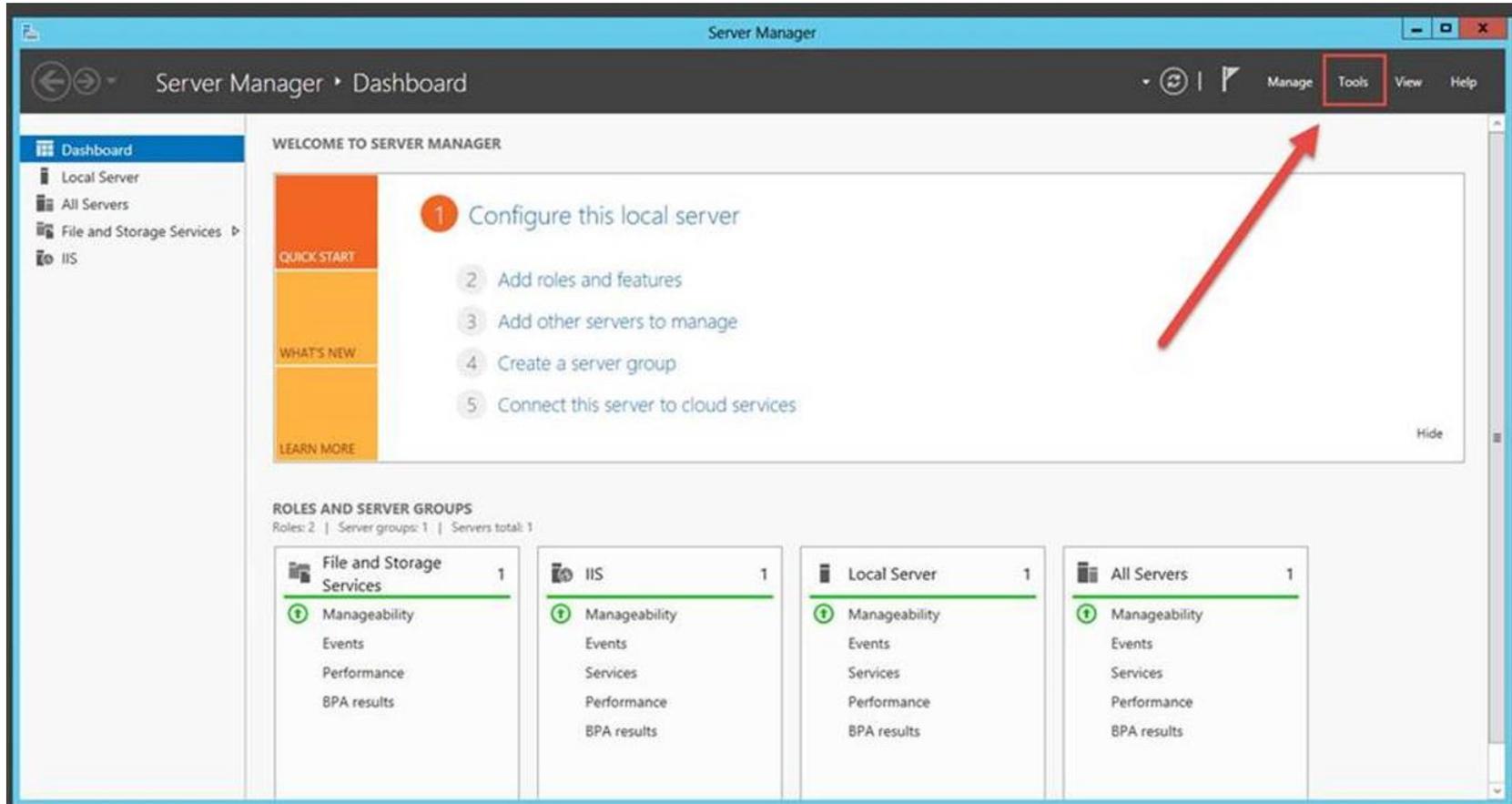
If you are on a shared server, please discuss your transition with your other shared server site code(s) as these changes may affect them. Before shutting down ILLiad, you may want to gather some information. If you would like, 2-3 days before going live work with your ILLiad SQL Server Administrator to obtain the following information:

- a list of patrons who have articles in a status of “delivered to web” in ILLiad, so that you may contact them via email and remind them to retrieve them in the next 30 days, before your ILLiad access is completely turned off

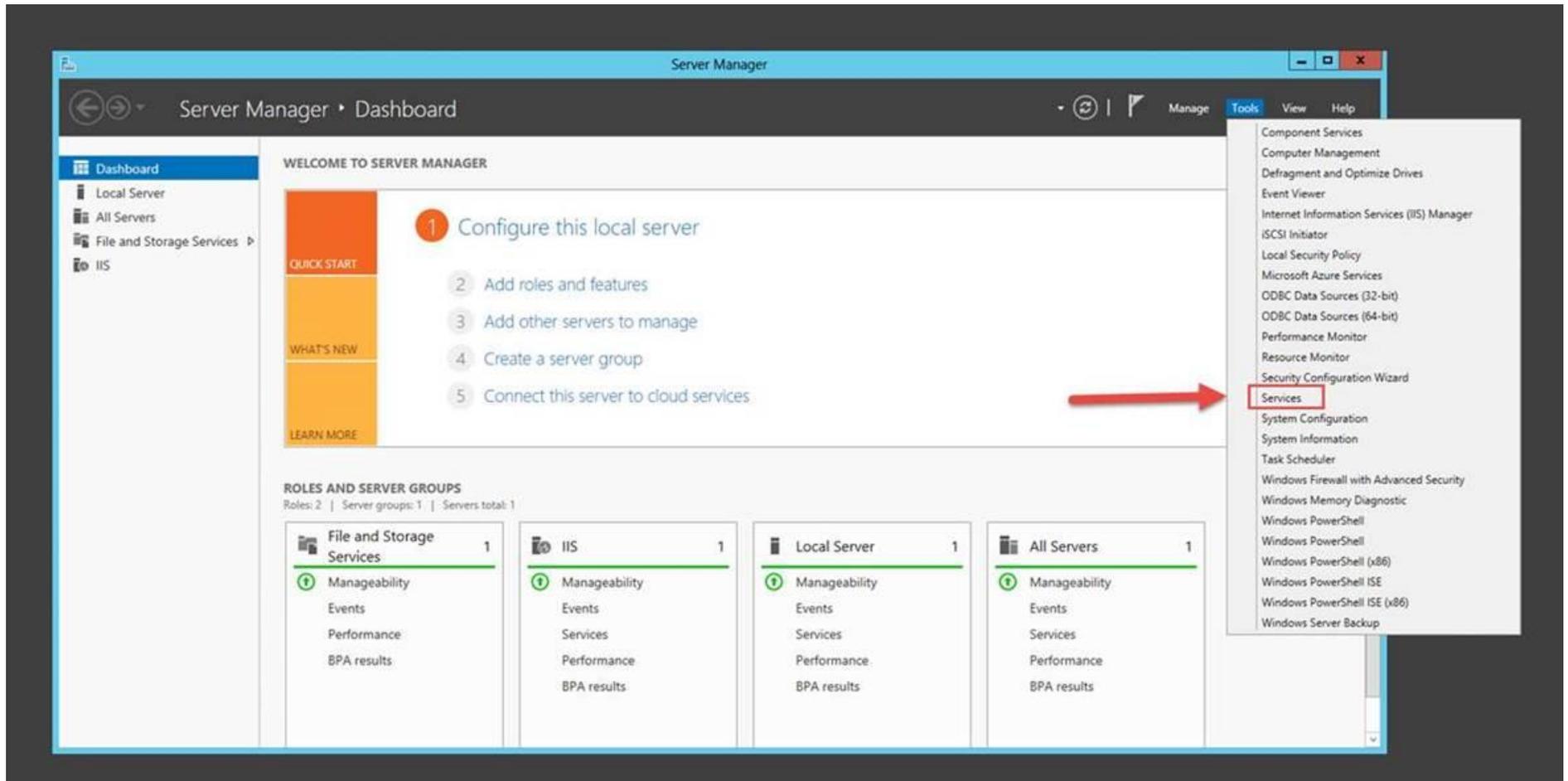
On or shortly before the last day that your ILLiad Client is to be active, complete the steps outlined below to finish your transition from ILLiad to Tipasa:

- 1) Before you begin any of the steps listed below, please make sure you clear out / process all requests with the following statuses in ILLiad to ensure they will also be available in Tipasa:**
 - a. Awaiting Request Processing**
 - b. Awaiting Copyright Clearance**
 - c. Awaiting Odyssey Processing**

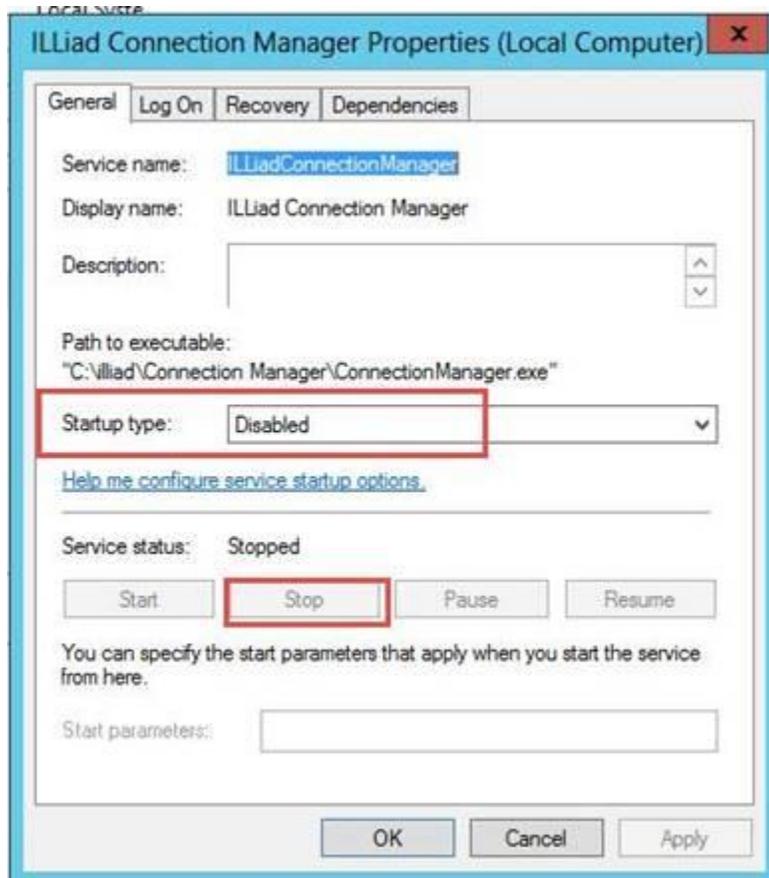
2) Go to Server Manager and click on Tools Menu



3) Click on Services



- 4) Click on each of the ILLiad services you may have installed (ILLiad Connection Manager, ILLiad ISO Manager, ILLiad Odyssey Manager, ILLiad Rapid Manager, ILLiad System Manager) and change the Startup Type to Disabled and Stop the Service.



5) **Disable and stop the service for each ILLiad service installed on the ILLiad Web Server:**



A screenshot of the Windows Services console showing five ILLiad services. Each service is listed with a gear icon, its name, its status (Disabled), and its path (Local System). The services are: ILLiad Connection Manager, ILLiad ISO Manager, ILLiad Odyssey Manager, ILLiad Rapid Manager, and ILLiad System Manager. The first service, ILLiad Connection Manager, is highlighted with a blue selection bar.

Service Name	Status	Path
ILLiad Connection Manager	Disabled	Local System...
ILLiad ISO Manager	Disabled	Local System...
ILLiad Odyssey Manager	Disabled	Local System...
ILLiad Rapid Manager	Disabled	Local System...
ILLiad System Manager	Disabled	Local System...

Once you do that, no emails should be going out from ILLiad any longer. This will prevent your ILLiad server from sending and receiving info from OCLC. For our hosted sites, we do this for them a day after they go live, but for self-hosted sites, we cannot do this on your behalf.

6) **NOTE:** before completing this step, make sure you have [set Article Exchange as your preferred method of electronic delivery](#).

Delete the ILLiad entry from your Contacts in the OCLC Policies Directory:

Log onto your Tipasa staff interface:

https://YOUR_REGISTRY_ID.share.worldcat.org/wms

(replace "YOUR_REGISTRY_ID" with your library's OCLC registry ID or vanity/custom URL; e.g.,
<https://1234.share.worldcat.org/wms>)

First, navigate to the **Interlibrary Loan Home** page, and click **OCLC Policies Directory**

Tipasa™ Home

Search for requests

Request ID

Active Requests Closed Requests

Frequently Used Tags

▶ All Tags (36)

Quick Links

Borrowing:

[AE Alert \(1\)](#)
[New For Review \(4\)](#)
 [Not Reviewed \(2\)](#)
 [Reviewed \(2\)](#)
[Produced \(5\)](#)
 [In Transit \(2\)](#)
 [Received? \(1\)](#)

Received

[Renewal Denied \(1\)](#)
 [Overdue \(2\)](#)

Returned

Lending:

[Lending Priorities Supplied](#)
 [Not Received \(1\)](#)
 [Overdue \(2\)](#)
[Returned](#)

Document Delivery:

[In Process \(3\)](#)
 [Retrieving \(3\)](#)

Other:

[OCLC Policies Directory](#)
[OCLC Service Configuration](#)
[OCLC Usage Statistics](#)
[OCLC Article Exchange](#)
[Resource Sharing News](#)
[WS ILL Training Resources](#)
[OCLC Community Center](#)

A new tab or window will open for the Policies Directory:



Search

Institution Information

Search By
Institution Symbol ▼

Countries (0) ▼

ND- Team 1 - Consortium of MnPALS libraries - Test Library (NDCML)

Profile Collections Policies (3) Schedule Contacts

▼ Summary

Click on the **Contacts** tab, find your ILLiad entry, and **Delete** it:

OCLC Policies Directory

OCLC Illiad Server 1 (LIAD)

Profile | Collections | Policies (0) | Schedule | **Contacts**

Contacts

TYPE	CONTACT
Article Exchange	URL: support@oclc.org Edit Delete
General	Attention: OCLC Customer Support Address: 6565 Kilgour Place Dublin, Ohio US 43017 Phone: 800-848-5800 E-mail: support@oclc.org URL: http://www.oclc.org/us/en/support/default.htm Edit Delete
ILLiad	URL: 10.32.144.22 Edit Delete
Location	Attention: OCLC Illiad Server 1 Address: 6565 Kilgour Place Dublin, Ohio US 43017 <small>This data is defined in the WorldCat Registry. To change, edit your: WorldCat Registry Profile</small>
Shipping	Address: 6565 Kilgour Place Dublin, Ohio US 43017 Edit Delete

[WorldCat Registry Profile](#)

- 7) **Optionally, you may retrieve reports and statistics from ILLiad Web Reports, by logging onto your ILLiad Client Interface, Clicking System and then Web Reports.**



Note: This may include the Borrowing and Lending Turnaround Statistics, along with your Copyright Report.

Alternatively, you can retrieve your web reports using Microsoft Access using an ODBC connection.

- 8) **Replace links to the ILLiad patron form with links to the new forms on your library web pages. NOTE: please make sure you have already set up the Patron Form in Tipasa before performing this step. Click [here](#) to access procedures for setting up patron forms.**

`https://YOUR_REGISTRY_ID.account.worldcat.org/profile`

(replace "YOUR_REGISTRY_ID" with your library's OCLC registry ID or vanity/custom URL; e.g., <https://1234.account.worldcat.org>)

- 9) Edit `include_menu.html` to remove the New Request section and the Tools section to remove the ability for patrons to place new requests in ILLiad. If desired, you may replace it with this simple file, available [here](#).

NOTE: *If the sites are sharing the same webpages, please skip this step. Email the Tipasa implementation team at implementation@oclc.org to discuss further options on how to prevent your users from placing new requests in ILLiad*

To do this, you will need to FTP to your ILLiad WebServer and replace the `include_menu.html` file located in the `illiad\NVTGC` site directory.

What is still accessible in ILLiad after going live with Tipasa?

- You can access web reports
- Your patrons can access their articles and request history
- There will be no further changes to your database including the addition of transactions