Using Get It Now with OCLC IFM and ILLiad

Implementation and Payment Process

The process below assumes the institution is set-up and using Get It Now, ILLiad, and the Get It Now ILLiad Addon and would like to switch their payment method for article purchases from monthly invoicing to IFM. It also requires the institution to have an IFM account in place

Implementation Process

1 Download and Install ILLiad v8.4 — You will need to schedule your update if you are hosted or run the ILLiad Updater on your server if you are self-hosted.

2 Obtain a Web Service Key & Secret from OCLC — a WSKey and Secret can be obtained at no cost at www.worldcat.org/config/#/. Follow the step-by-step process in the attached document "Requesting OCLC WSKEY". If you encounter problems obtaining a WSKey and Secret, please contact OCLC Order Services at orders@oclc.org.

3 In the ILLiad Customization Manager, set your OCLCWebServiceV2APIKey and OCLCWebServiceV2APISecret keys to the values provided by OCLC. Additionally, complete the WebPlatformConfig table entries and the ILLiadWebPlatformConfig customization keys.

4 Download and Install the Get It Now ILLiad Addon v2.0 — The Get It Now ILLiad Addon v2.0 can be downloaded from the ILLiad Addons Directory located at https://prometheus.atlas-sys.com/display/ILLiadAddons. This new version of the Addon supports article payment via IFM or CCC invoice. Before installing the new Addon, be sure to record or "print screen" the configuration settings in your current Addon since they will be deleted upon installation of the new Addon. Configure the new Addon using the settings from the previous version. The Addon folder needs to be installed in your Addons directory on the local workstation or in the AddonsDirectory location from Customization Manager for all clients to retrieve and install. If you have problems re-configuring your settings in the Addon, please email getitnowsupport@copyright.com.

5 Restart ILLiad — once you have downloaded and installed ILLiad v8.4 and the Get It Now Addon v2.0, and have obtained a WSKey, restart ILLiad. ILLiad will configure and display the Addon on the request form when appropriate. If you encounter problems restarting or using ILLiad or IFM, please contact OCLC Customer Service at support@oclc.org.

Requirements

To use IFM to pay for Get It Now article purchases you must have one of the following:

- CCC Get It Now service using the mediated workflow
- OCLC ILLiad v8.4.2.0
- CCC Get It Now ILLiad Addon v2.1
- OCLC IFM
- OCLC Web Services Key & Secret

Please be aware that you will still receive an "invoice" and detailed order report monthly or semi-monthly from CCC but there is no need to pay it as indicated by the following statement that will be on it: "This is not an invoice and is for reporting purposes only. Your institution's Get It Now requests were paid via OCLC IFM." If your institution uses both the mediated and unmediated workflows, you will receive an invoice (in addition to the above) for orders placed under the unmediated workflow.

Get It Now IFM Payment Process

1 If the requested article is available through Get It Now, the "Get It Now Search" tab will appear in the ILLiad Borrowing Request screen. Click on the tab to request the article from Get It Now and pay for it via IFM.

2 After entering the email address for article delivery and accepting the terms and conditions, click on the "Initiate IFM Payment" button at the top of the screen. Upon clicking the button, it will turn gray and CCC will begin processing the request. This may take a few seconds depending on network traffic.

3 Next, the Get It Now request confirmation page will appear and the "Approve IFM Payment" button at the top of the screen will turn from gray to multicolor. Click on the "Approve IFM Payment" button. Note: failure to do this step, or delaying it more than 20 minutes, will result in the cancellation of your request.

4 Upon IFM payment approval, you will be directed to the ILLiad "Detail" tab. The article request will be fulfilled by CCC and the fee will be charged to your IFM account. If you need to view the Get It Now order confirmation, click on the "Get It Now Search" tab and the online confirmation will appear.

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