How do I create a list of blocked institutions in ILLiad?


Symptom

You want a list of the Blocked institutions you have in ILLiad.

Applies to

ILLiad

Resolution

Yes, you can do a Custom Search to find the list of Blocked Institutions.

1. From the ILLiad Home, there are three search boxes. For the "Search Addresses:" box, to the right of the words "Search Addresses" there is an arrow that when you click on will allow you to do a Custom Search of the Lender Addresses. Here is a link to the documentation on the Custom Search.

2. After you click on the link, you will be in a Window with the Title Custom Lender Address Search. Beside the And is a +. Click on the Plus sign to add a condition.

3. You will see [LenderAddresses.LenderString] Begins with <enter a value> x. Click on the Lenderstring.

4. On the left, you will see the Table, which is LenderAddresses and on the right are the different fields. Select the field "Blocked." Then choose Accept.

5. Click on the Contains and choose equals.

6. Click on the <enter a value> box and type in "Yes" without the quotes.

7. Then click on the Search Magnifying glass on the top left.

This process will give you the list of LenderAddresses that you have blocked. The line in the end before you search will be:

[LenderAddresses.Blocked] Equals Yes x

Additional information

If you want to export the information, you can highlight the results and copy them with ctrl+c. Then, open up Microsoft Excel and paste the results into Excel.