Get started

Get started with ILLiad.

- About ILLiad
- ILLiad training
- Integrate ILLiad with your local authentication system via EZproxy
- OCLC ILLiad hosting operations

Troubleshooting

Find frequently asked questions (FAQ) and troubleshooting steps (Troubleshooting).

- After connecting to the ILLiad Server, how do I edit the Web pages?
- After I upgraded to 9.0 on one machine, I am unable to sign into ILLiad with my username and password on a machine that is using 8.7.2.0.
- After I upgrade my Microsoft Windows to the latest version, when I process items from Article Exchange I need the files to go to the directory I was using before the upgrade
- After upgrading to 8.7.3.0 or 9.0.3.0, the lender is having issues sending Odyssey Documents to me for Decline Requests
- After upgrading to ILLiad 9.0 how do I issue an IFM refund?
- After upgrading to ILLiad 9.0, my barcode font is not printing
- Are there any changes that ILLiad needs to make when DOCLINE updates their Address on 8/12/2019
- Are there any Release notes for 9.1 yet?
- Are there WebReports that pull information from both Document Delivery and Borrowing?
- A staff member who was a contact for ILLiad and WorldShare is retiring, where do we need to update our contact information to reflect this?
- Because I am purging old authorizations from my system, how do I know which ILL authorization I am using for ILLiad?
- Borrowing conditionals status not updating properly
- Can a patron have both ILLiad Authentication and Remote Authentication at the same time?
- Can a patron track the history of their requests?
- Can borrowers be blocked temporarily?
- Can ILLiad block a request based on a policy problem?
Can ILLiad import TIFF or PDF files for patron delivery?
- Can ILLiad run on several computers? How do I consolidate?
- Can ILLiad SQL server run on the same server as an IIS Web server?
- Can I customize statistics from ILLiad database information?
- Can I edit a borrowing note after I've already sent it?
- Can more than one staff member use ILLiad at the same time?
- Can our librarians work from home when we are an ILLiad OCLC Hosted site?
- Can statistics be output for import into Excel or Access?
- Can the Odyssey notifications sent to patrons on electronic delivery be configured to use different templates for different patron categories?
- Can we have two Web Servers pointing to the same Database?
- Can we run the ILLiad Addons from a different directory than within the ILLiad folder?
- Can we set up our ILLiad Print Templates to be on a shared drive?
- Can we switch to remote authentication around the time we upgrade?
- Can you explain the Borrowing Turnaround Time reports and how it works?
- Can you have two instances of the client on the same machine pointing to a different server?
- Can you make your own selection of required fields?
- Can you set up an expiration for the passwords in ILLiad 8.7?
- Converting old ILLiad print templates from .doc to .docx
- Copyright Clearance Center is requiring TLS 1.2 as of March 1, 2019 for ILLiad
- DefaultAccounts Table in the Customization Manager
- Decline Requests not Imported to ILLiad
- Does ILLiad keep track of when user accounts are created?
- Does ILLiad Support ISSN searching in Primo/Alma?
- Does ILLiad support Linux SQL Servers?
- Does ILLiad Support the DMARC Process using DKIM for EMail Notifications?
- Does ILLiad Support the ISO-10161 standard?
- Do I have to submit copyright payment for a Book Chapter request through ILLiad?
- Do I need to be concerned with the logon or logon2 Web pages if I am using ILLiad Remote Authentication with EZproxy?
- Do I need to check an item in when it is sent through Odyssey?
- Email Imports using Alma where the =09 show up at the end of each line of text.
- Everyone of our staff now see the default layout in ILLiad when we all had it customized previously
- Every time I open a request in Borrowing, I am getting a script error message that keeps on coming up
- Finding and replacing the new Docline 6.0 scripts
- FTP Timeout for hosted ILLiad site
- Hosted ILLiad sites that want SFTP
How can I change my logo in the ILLiad web interface?
How can I check which version of ILLiad I am running?
How can I clear items that appear to be “stuck” in Awaiting Electronic Delivery?
How can I delete a user through ILLiad?
How can I do a Custom Request search in ILLiad?
How can I fix a problem in ILLiad where I have one computer unable to connect to Docline?
How can I get a list of all my patrons in ILLiad?
How can I get a report of my ILL Fees for Borrowing for ILLiad?
How can I see an error log in ILLiad?
How can I see in ILLiad the items that show up in WorldShare ILL as In Transit?
How does Article Exchange work in ILLiad?
How does Email Routing work in ILLiad?
How does ILLiad build statistics reports?
How does ILLiad Exclusive work with the password when it is used to Validate users and upgrading to 9.0?
How does the ATLAS Authentication Portal work with ILLiad?
How does the DaysBeforeElectronicDeliveryCleanup work?
How does the Patron Load work with ILLiad?
How does the UserValidation table work in ILLiad?
How does the WebValidation table work in ILLiad because I am getting an error message when trying to register?
How does Z39.50 work?
How do I access the WebReports from within the ILLiad Client?
How do I add and remove Delivery Locations in ILLiad?
How do I add a Default Account in the ILLiad DefaultAccounts table in the Customization Manager?
How do I add a group in the Group Maintenance for ILLiad?
How do I add a request manually for a patron in the ILLiad Client?
How do I add or remove a flag in ILLiad?
How do I add or remove Custom Holdings Groups in ILLiad?
How do I add tags to my Email Import?
How do I apply a different Constant Data record to a borrowing request in ILLiad so that the correct information is applied to the request?
How do I break out the date so the PhotoJournalMonth will show separately in an ILLiad incoming request from a patron?
How do I change a User Password in ILLiad when I am using ILLiad Authentication?
How do I change the Logout URL that ILLiad goes to when a patron logs out of the system?
How do I completely uninstall the ILLiad Client so it can be reinstalled?
How do I connect to the Web Server to edit files when I am a Hosted ILLiad site?
How do I create a list of blocked institutions in ILLiad?
◦ How do I create a Web Alert for my patrons?
◦ How do I customize my email settings if the settings in the ILLiad Customization Manager are not enough to work with my Email?
◦ How do I delete Lending Transactions before a certain date such as 1/1/2016 from my ILLiad Database?
◦ How do I delete users from my ILLiad Database?
◦ How do I disable all billing in ILLiad so we do not bill anyone for Borrowing or Lending?
◦ How do I disable Direct Request in ILLiad?
◦ How do I disable TLS 1.1 on my ILLiad Web Server?
◦ How do I do a batch update for the Users, Transactions, or Lenders in ILLiad
◦ How do I edit my ILLiad Notifications?
◦ How do I edit my ILLiad Web pages?
◦ How do I edit OpenURL so the month will show up in an ILLiad request?
◦ How do I edit the Borrowing Cancellation reasons that show up in ILLiad?
◦ How do I enable Direct Request for ILLiad?
◦ How do I find out what version of the ILLiad Client I am using?
◦ How do I fix and error when printing in ILLiad that keeps on talking about setting up a table?
◦ How do I fix and issue where I migrated the ILLiad Database but the services will not start?
◦ How do I fix a possible WorldCat Local Addon error in ILLiad?
◦ How do I fix a problem when I am trying to sign into my ILLiad Web Site and I am getting an error message saying "Internal Server Error 500?"
◦ How do I fix Connection Manager errors?
◦ How do I fix it if I have one patron contacting us about a problem with OpenURL to ILLiad from FirstSearch?
◦ How do I fix it so I can process ILLiad Electronic Delivery because the Process Files is grayed out
◦ How do I fix it so the due date does not change when sending a Renewal Request?
◦ How do I fix it when I am getting a message in ILLiad that says 401: Unauthorized?
◦ How do I fix it when I am not seeing all the fields in the Notes section of a request in ILLiad?
◦ How do I fix it when I am receiving a request in ILLiad and then it is showing a message about Undo Shipped
◦ How do I fix it in ILLiad when I bill for Lending and when the Billing window pops up it is blank when I expect an amount to be in the window?
◦ How do I fix it when I have a file that I edited and saved the PDF, but I am getting PDF Conversion failed error message in ILLiad?
◦ How do I fix it when I open up ILLiad, I get a message about unable to access the directory for searches and ILLiad Closes?
◦ How do I fix it when my ILLiad Lending request stayed in the "Conditional Request" queue even after I filled the request?
◦ How do I fix it when the ILLiad Client is unresponsive?
◦ How do I fix it when we updated items as shipped in ILLiad, but they are showing the OCLC Status of

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Considering?

- How do I fix the ILLiad Copyright WebReport when it shows items that have copyright payment required when they should not be in the report?
- How do I fix the OCLC status when I have a book that was billed because it was damaged and the request is finished, but the OCLC Status says “Received - Overdue?”
- How do I get a list of all transactions for one patron and put it in Excel?
- How do I get a Mail merge document to work properly so I can work within the mail merge in ILLiad?
- How do I get ILLiad to stop sending overdue notices when the request is closed in WorldShare ILL?
- How do I get into the Customization Manager after upgrading to ILLiad 9.0?
- How do I get it so when I print in ILLiad, it goes directly to the printer?
- How do I get my ILLiad logon page to show a Password reset link and we use ILLiad Authentication?
- How do I get the ILLiad Billing Manager to go Live for other sites on a shared server when I already have one site that is Live out of all the sites?
- How do I get the ILLiad Hosted Server Build?
- How do I include all the Journals requested for the Most Requested Journal Report for ILLiad?
- How do I install an ILLiad Client Addon?
- How do I install an ILLiad Server?
- How do I install an ILLiad Server Addon?
- How do I install the latest version of ILLiad?
- How do I integrate ILLiad with Aeon?
- How do I limit what a patron sees in the Outstanding Requests in ILLiad?
- How do I make changes to an existing OCLC Request in ILLiad?
- How do I manually update a request in ILLiad?
- How do I merge ILLiad Lender Addresses?
- How do I notify patrons that we are going to have the ILLiad Web down for a period of time?
- How do I process all my Docline requests that are delivered by Odyssey that are showing up in Electronic Delivery under the No ILL Number Match?
- How do I process an ILLiad Unfilled Request properly to resubmit the request?
- How do I remove records from my Copyright when I loaded my Copyright submission form in ILLiad and see that I have items in the list that should not have copyright on them?
- How do I request to have my ILLiad Hosted server updated?
- How do I say yes or no as a Borrower in ILLiad to a Lending Conditional?
- How do I schedule an upgrade for the ILLiad Hosted Server?
- How do I search in ILLiad for the OCLC item?
- How do I set it up in ILLiad so the Web pages pull the NVTGC options from the CustomDropDown table for my Registration page?
- How do I set it up so that Odyssey Requests are no longer sent automatically to the patron?
- How do I set Request Limits for patrons in ILLiad?
How do I set up a Microsoft Access Link for the OCLC ILLiad Hosted Site?

◦ How do I set up a Z39.50 connection to Alma from ILLiad?
◦ How do I set up my ILLiad Services for Debug Logging?
◦ How do I set up Office 365 email to work with ILLiad?
◦ How do I set up OpenURL for Alma using ILLiad?
◦ How do I set up Text Messaging in ILLiad?
◦ How do I set up Web pages for specific Patron statuses in ILLiad?
◦ How do I submit a copyright order in ILLiad?
◦ How do I turn on IFM for ILLiad?
◦ How do I update a Network path that ILLiad will use?
◦ How do I update ILLiad to the newest version on my Web Server?
◦ How do I update messages that are sent to the patron when they are using the ILLiad Web pages?
◦ How do I update my Article Coversheet when I am an ILLiad Hosted site?
◦ How do I update the IP address of our Web Server in the Policies Directory so it gives others the new Odyssey IP address?
◦ How do I update the NVTGC of the DisplayStatus table where the NVTGC is ILL and I want it to be something else in ILLiad?
◦ How do I update the options in the Shipping Options drop-down in the ILLiad Client?
◦ How do I use the Electronic Delivery Utility to send requests when I have scanned the articles already?
◦ How do routing rules work in ILLiad?
◦ How do we find out the size of our SQL Database when we are hosted by OCLC?
◦ How do we fix the issue in ILLiad we are not receiving any new requests on the Lending side?
◦ How do we get a group-based report on Web-based statistics?
◦ How do we identify requests in Document Delivery that we use Purchase on Demand?
◦ How do we migrate our ILLiad Server to a new server if we are self-hosted?
◦ How do we remove ILLiad outgoing Notifications that failed and there is no from address because we cannot delete them?
◦ How do we set it so patrons see a specific status because we do a bunch of internal routing and our patrons are seeing all the statuses which confuses them?
◦ How do we set up ILLiad so that we use an alternate port like 1344 instead of 1433 in the SQL Alias Manager?
◦ How do we temporarily disable Overdue Notices?
◦ How do we update the Max Cost in ILLiad so we can respond Yes to a conditional?
◦ How do you update the Drop Down Menus in the ILLiad Client in the Patron record?
◦ How long are ILLiad Transactions kept on the OCLC hosted site?
◦ How long does a document remain on the Web for downloading?
◦ How many characters are allowed in the ILLiad Outgoing Email Notifications Subject field?
◦ How many ILLiad Licenses can you have?
How often are the ILLiad Hosted servers backed up?

How often are the ILLiad Hosted sites backed up?

How to construct your Open URL link in ILLiad?

How to delete an ILLiad Patron account?

How to fix the error messages in ILLiad I am getting when I was at 8.7.0.0 and I was asked to upgrade to 8.7.3.0 and I upgraded?

How to revive a cancelled request in ILLiad?

How to update the SQL Alias Manager for Shared Server install?

How to update your supplier status from within the ILLiad Client?

How will you use the Import feature when Docline 6.1 comes out for ILLiad?

I'm getting an error when I try to print in ILLiad, why is this?

If a patron changed their password recently and I change the password complexity requirement, will the patron have to change their password again?

If I accidentally mark an item as shipped with IFM charge and I cannot do Undo Shipped in ILLiad, how do I fix this issue?

If I use the notes field in ILLiad, will the Borrower see the note?

If I want all incoming ILLiad Lending requests to have the Default Shipping method to be US Mail, how do I set this up?

If I want the base URL for OpenURL for ILLiad, what do I use?

If we are an ILLiad site, and we do not see any requests in Awaiting Odyssey Processing, do we still need to process electronic delivery?

If we have a hosted ILLiad Email and we need to whitelist the server, what IP addresses do we need to add?

If we have ILLiad Authentication going into 9.0 what should we be prepared to happen with the passwords?

Awaiting Customer Contact not sending out notifications

Change User Information Web page showing NVTGC instead of Description

ILLiad Client crashes trying to deliver a PDF via Odyssey

ILLiad Constant Data not saving after making edits

Custom Reports

Delete Patrons request

Display Status limitations with ILLiad

How do I correct the email address a Docline Library has for me?

Everyone is being sent to the Logout page when coming form EZproxy to ILLiad

ILLiad Fill Rate statistics give a higher total if you look at each month and total it for the year rather than just looking at the year

How do I change the when Overdue Notices go out with ILLiad?

How do I mark an invoice paid in ILLiad?

How to disable the Billing Manager in ILLiad?

ILLiad ILLiad Compatible with SQL Server 2019
- Installed a new ILLiad Client on a computer and it is saying it is missing a SQL Logon?
- ILLiad is freezing when displaying Lending requests
- ILLiad is getting a slow response and is sluggish especially when sending electronic articles
- Is my IP address range covered for ILLiad hosted site?
- I am retiring and I have questions for appointing new contact for ILLiad
- I forgot the information I need to put in the SQL Alias Manager
- I have a failed outgoing notification that needs to be cleared from ILLiad.
- I just installed ILLiad 8.7.2.0 or 8.7.3.0 on my computer and when I go to the Lending requests I get an error message
- I just updated my Windows version and now nothing prints
- I want to replace the logo for our Web pages in ILLiad
- ILLiad not getting any lending requests lately, is ILLiad working correctly
- No longer able to search records using the Transaction number in ILLiad
- OpenURL is not filling in the ISSN field
- ILLiad Patron Expiration Date
- Please restart our hosted ILLiad server in order to activate a new server addon
- ILLiad printing Barcode is showing the Transaction Number and not the ILL Number
- Printing is not working and I am getting an error message about a table in ILLiad
- ILLiad requests keep on changing back to Unfilled
- ILLiad shared site receiving item and then switching sites for patron causes "Record not found" message for the OCLC Status
- TLS 1.0 no longer being supported
- Twilio is requiring updates on the servers, are we ready for the security updates?
- ILLiad WebPlatform log is not showing any changes for a few days
- We are stuck trying to send a Borrowing request with an error message in ILLiad
- We have sent the logon.dbc to a computer that installed ILLiad, but we need the Password for it to work properly
- What do I do when I receive an incorrect item?
- What is Awaiting Article Exchange Retrieval in ILLiad?
- Why doesn't the patron account delete automatically after one year in ILLiad?
- Will ILLiad be ready for Docline 6.0?
- In ILLiad, can we upload the Users into the Users table?
- In ILLiad, how can you test if failed emails are now working after you make changes to your settings to fix the issue?
- In ILLiad, my screen display looks wrong
- In ILLiad, no requests are coming in for lending can you fix it?
- In ILLiad 9.0, how do I make a field not required on any of my Web Forms?
- In ILLiad 9.0, I have to select the Borrowing or Lending Library every time even if it is one library
In ILLiad 9, where do we add a formstate tag to the documents that it talks about in the Release Notes?

In ILLiad, how do I accept a conditional where I need to increase my Max Cost?

In ILLiad, how do I change my Lender Address table so the Lender strings are all Uppercase?

In ILLiad, how do I fix it when I am getting a failed notification for articles with long titles?

In ILLiad, How do I print a Lending invoice for a lost book in the Billing Manager?

In ILLiad, how do I request a WSKey?

In ILLiad, how do I set up a routing rule so that Rapid Requests do not go to Awaiting Copyright Clearance?

In ILLiad, is there a way to add in additional queues that we can mark items "In Transit" and "Check Out" in WebCirc?

In ILLiad, is there a way to delete a patron's request history while keeping stats and collection data?

In ILLiad, I am processing a borrowing request and the Due Date is changing to 1/1/1900

In ILLiad I am searching for the TN number under ALL and it works, but it does not work when I use the TN option

In ILLiad I am seeing my emails sitting in pending and they are not going out, how do I fix this?

In ILLiad, I am trying to Renew a Borrowing request and nothing is happening

In ILLiad, I first sent out a request with Rapid and then sent it out to OCLC, but I cannot update the OCLC request to received

In ILLiad, my patrons are not getting notifications

In ILLiad, whenever I click on a Transaction Queue like In Stacks Searching or Awaiting Lending Scanning, I never see the requests and I want to know how to see the requests?

In ILLiad when I try to send an electronic article, it gives me an error and I cannot send the file

In the Billing Manager, I am not seeing any EFTS to generate a file

Is there anything OCLC can do about Lenders holdings for Electronic articles that are missing?

Is there anything we need to do after adding an ILLiad Server Addon into the Customization Manager?

Is there an ILLiad Cheat sheet that I can print up?

Is there a place where I can make edits to the Web pages so I can see what they look like before they show up in production?

Is there a way that I can set it up so that when patrons register that information from our system can be loaded on the Registration form?

Is there a way to get a copy of an email that is being sent in ILLiad to a patron so we know that the email was sent?

Is there a way to implement pop-ups to show up on certain borrowing requests that require special handling in ILLiad?

Is there a way to limit borrowing requests to Library Use Only?

Is there a way to limit the number of Lenders that show up in the ILLiad Workform to be less than 15?

Is there a way to make sure my electronic articles deliver?

Is there a way to stop users from requesting items until they are cleared?

Is the Patron information sent over to Lenders?

It has been six months since I upgraded to ILLiad 9.0 and when I sign into ILLiad, I am being asked to
change my password

- I added a Delivery location and now when I get to the Workform, I get an error message and I need this fixed
- I added some email templates in the Customization Manager, but they are not showing up in the ILLiad Client
- I am adding a new location in ILLiad, how do I update this information to Lenders?
- I am an ILLiad Hosted site and I need help on how we can fix it when we have many patrons who have a blank entry for the Loan Delivery Method?
- I am an ILLiad Hosted site trying to FTP to the server and unable to connect with the correct information using Filezilla
- I am an ILLiad site and my Lenders say my email address is missing when I send out requests
- I am an single server ILLiad site and when I route items to Awaiting Rapid Local Sending it does not do anything
- I am a Borrowing Library and I am getting an error message when I try to check in an item from the Lender
- I am getting an error about the Images path and I cannot open up the ILLiad Customization Manager
- I am getting an error message when I click on an item in the NO ILL Number Match field and I need to fix it
- I am getting an error message when trying to sign into ILLiad from my EZproxy using OpenURL with special diacritics and I am using ILLiad 8.7.x.x
- I am getting an error message with the ILLiad Fill Rate Statistics
- I am getting an error retrieving status when looking at a Borrowing Request in ILLiad
- I am getting a Data Transport Connection error message in ILLiad when trying to deliver through Odyssey, what does this mean and how do we fix it?
- I am getting a error when clicking on the Lending Overdues
- I am getting a message asking for a Code when I am trying to install a new Web Server, but it is not the latest Web Server Version.
- I am getting a Pooled Connections error on my Web Sever, how do I resolve this issue?
- I am getting a red stop sign in the Connection Manager alert, what do I do about that message?
- I am getting a runtime error when I go to the ILLiad WebReports or WebCirc sign in page
- I am getting a version mismatch message where it says my version of ILLiad is greater than what is on the server
- I am getting the message "Invalid Session ID" when I try to sign into ILLiad through the Web
- I am having a problem with missing data from the link that goes from WorldCat to Serial Solutions and then on to ILLiad
- I am having issues with Mac user from EZproxy to ILLiad Web pages and need to know how to fix the issue
- I am having troubles updating my Direct Request Profile through ILLiad
- I am in Copyright Clearance and I can see my record, but on the bottom right, the information is blank
- I am in ILLiad Lending and I am trying to update Stack Search Results, but the Transaction number I am putting in is not showing up
- I am in the ILLiad Billing Manager and I need to know how do I reset the path for the mail merge for bills?
- I am in the Word Document to print a Billing Manager Invoice, but when I go to Mailings ribbon, I do not

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have a choice to Finish and Merge

- I am migrating from ILLiad to Tipasa, but my Workform needs an ID field to submit requests because I am getting a message about having a Patron ID field.
- I am on a brand new install for ILLiad and when I click on Mark Found Scan now, the request information shows on the left, but no information shows on the right and Send via Odyssey or Article exchange are grayed out.
- I am on a ILLiad Hosted site and I am getting an SSL certificate error.
- I am on a shared server and I upgraded, but my ILLiad Connection Manager service will not start.
- I am on a shared server in ILLiad and I am trying to update my LocalInfo table for my site, but I get an error message when I try to save the change.
- I am printing my Lending Shipping Labels and the system locks up and gives me an error message.
- I am running the NCIP Clients Addon for Aleph and I need to know from where the IP address that is being used.
- I am searching Usernames in ILLiad from the home screen and I am getting no results.
- I am seeing a new status in ILLiad in the OCLC status field that says supplied.
- I am seeing a special message and I am not sure what it means?
- I am sending out emails and getting a security certificate error.
- I am setting up my printer settings in ILLiad, but every day I have to put them in again.
- I am trying to complete a request, but it will not allow me to do this because the OCLC status is Received - Overdue.
- I am trying to customize my layout, but I do not see the field I want when I go to the Hidden Items tab.
- I am trying to get into Web Circulation and I am getting an error message.
- I am trying to print in ILLiad, but the information never updates to the current data.
- I am trying to print in the ILLiad Billing Manager service, but the data file is not changing, so I see old data.
- I am trying to process electronic delivery files in ILLiad, but the Process Files icon is grayed out.
- I am trying to put files on the ILLiad Hosted server, but it will not allow me to overwrite the files.
- I am trying to run the Server Installation file, but I am getting an error message about the IIS Root folder.
- I am trying to save an ILLiad Webreport as a PDF, and I need it to line up correctly.
- I am trying to submit my copyright in ILLiad, but I am getting an error message.
- I am unable in ILLiad to send an article through Article Exchange.
- I am unable to process a file and send it to the Web Server either through Borrowing Scanning or Doc Del Scanning.
- I am unable to see all the Transaction Statuses in ILLiad under Borrowing, Doc Del, or Lending.
- I am unable to send out through Article Exchange and when I look at the ILLiad WebPlatform Log it says access denied for the c:\Windows\Temp\ILLiad and some subfolder.
- I am using Alma, NCIP and I need help in how to use the ItemInfo3 field.
- I am using a BookScan Scanner with ILLiad and I need the Username and Password it is requesting.
- I am using a database that sends an OpenURL link to ILLiad, but the wrong form is opening.
- I am using ILLiad 8.7.2.0 and getting error messages every time I open up Lending Article Request.
I am using ILLiad 9.0 or earlier Hosted ILLiad and my Microsoft Access scripts are not working

- I am using ILLiad on a Windows 10 machine and I am getting LUA script errors showing up in the ILLiad Client when I try to Process DOCLINE requests
- I canceled my request in ILLiad, but it is not showing as canceled on OCLC
- I cannot check in an item from a Borrowing Library that has been returned in ILLiad?
- I cannot see any entries in the Events Log in the ILLiad Client
- I can get into the ILLiad Client, but I cannot get into any of the other services such as the Customization Manager
- I can not open an Addon file directly from the Addon page
- I changed our borrowing/lending renewal dates, but the new date is not applying?
- I changed the password for my patron in the patron record in ILLiad, but the password does not work?
- I closed a request in ILLiad, but the OCLC Status still shows supplied
- I created a Borrowing Routing rule that goes to a CustomQueue and when I try to request from OCLC, I am unable to put in the Lending symbols
- I created a scheduled closure in ILL Policies, but my request keep on disappearing when I come back
- I forgot to submit copyright information for the past six months and I know what needs it, how do I fix this issue?
- I have a Custom Holdings group and I cannot add a symbol to it when in the ILLiad OCLC Resource Sharing settings
- I have Borrowing requests stuck at Awaiting Direct Request Sending, how do I fix this?
- I have lost Transaction queues like Awaiting Request Processing in the ILLiad Client, how do I get them back?
- I have Outgoing notifications showing in "Pending" status and they will not go out
- I have requests sitting in Awaiting Odyssey Processing in ILLiad and they are not moving out of that queue
- I have two users and I need to merge them, how do I do this process?
- I just installed ILLiad and I need to know what I put in the ATLAS SQL Alias Manager for the Server and Database Name?
- I just installed ILLiad on a new computer, what settings or permissions should I have on my computer?
- I just installed the ILLiad client, but the ILLiad Customization Manager will not open
- I just installed WorldCat Local Addon and I am getting an error when I open up a request
- I just moved my ILLiad server and now emails are not going out
- I just upgraded to a new version of ILLiad on my Web Server and now I am getting an Internal Server Error when trying to deliver through Article Exchange
- I need help with an ILLiad Addon
- I need help with ILLiad WebPlatform API
- I need to install ILLiad on a new computer where do I get the file
- I need to know the process for updating the latest server in ILLiad
- I need to manage the Addons, but I am unable to see the icon in the ILLiad Client
- I need to understand the difference between Odyssey, Borrowing, and Doc Del in ILLiad
I need to upgrade my ILLiad SQL Server to a newer version, how do I do that?

◦ I noticed there an " IFM Charges" report in the ILLiad Reports, under Lending. Is there one under Borrowing?

◦ I received a canceled book request, and I need to return it without contacting the customer

◦ I received a document that I cannot process in Electronic Delivery for ILLiad

◦ I returned and item and yet my patrons still get overdue notices in ILLiad

◦ I sent a request out through Rapid and now trying to send the request out through OCLC, but I cannot see any holdings

◦ I set up the link for RSS feeds on the Borrowing ILLiad Web page, but it is not working in Google Chrome and Firefox

◦ I used Microsoft Word to edit my routing rule before copying my routing rule over to ILLiad Customization Manager and the rule is not working

◦ I used to see a pop-up window when printing asking me if I want to print or cancel, but I cannot see it anymore?

◦ I want a list of all my patrons, how do I get them

◦ I want to get a custom report within ILLiad, how can I do this?

◦ I want to set up a Custom Holdings Group for LVIS in ILLiad, but I can only get so many symbols over because there are too many symbols

◦ I want to set up a new group in ILLiad and I want to make it so none of the borrowing libraries are billed

◦ I would like to request that an IP range be opened up for ILLiad client access at one of our new sites?

◦ Migrated a SQL server 2008 R2 on an infrastructure of 2016 and the Webplatform stopped working

◦ My Bookeye scanner upgraded and now it is needs a password, where do I get that information

◦ My ILLiad Odyssey Manager is having issues processing requests on my new server and TLS 1.0 is enabled

◦ My ILLiad server IP address is changing and I want to know where I need to update my IP address for the Odyssey IP address

◦ My patrons are requested to change their password the first time they sign into ILLiad after I upgraded to ILLiad 9.0 and I am using ILLiad Authentication

◦ My patron is trying to view electronically delivered articles and they are seeing "File not found" where they usually see "View."

◦ My patron received an ILLiad email that the Electronic Article is ready, but when the patron gets to Electronic Articles, the file is not there

◦ I am getting an IFM token error

◦ My Rapid Manager service is not sending or receiving

◦ None of my Flags or Notes are showing up on my Lenders Page in my Illiad Client

◦ Now that the National Library of Medicine is no longer supporting Loansome Doc, what options do we have?

◦ On our ILLiad Hosted site, why is the time stamp of requests coming from the ILLiad Web Pages showing for the Eastern Time zone United States rather than our time zone?

◦ Our ILLiad Email links are showing a non-secure http address and we need them to show https because we are a secure site
Is there a way to automate the Awaiting Request Processing queue to route to a sharing group after clicking the "No Problem" button?

◦ What changes do we need to make following our upgrade to ILLiad 9.0?
◦ Patrons are being kicked out of ILLiad when submitting requests after EZproxy Authentication
◦ Rapid IP / DNS change for RapidX
◦ Requests submitted and not importing into ILLiad while the ILLiad server was down running Windows patches
◦ Since we updated to ILLiad 9 we have not been able to use Undo shipping feature on any of our requests?
◦ There are items stuck in Awaiting Direct Request Sending
◦ The ILLiad PDF Viewer Addon is not pointing to the PDF folder, how do I fix this issue?
◦ Unable to change password for lender in ILLiad Client on a shared server site.
◦ Unable to Open a PDF in ILLiad
◦ Unable to send articles through the Bookeye Scanner
◦ Unique ID for installing ILLiad on a new Server
◦ Were to find profiled Groups and edit them in ILLiad.
◦ We already use FirstSearch. Can we continue using it?
◦ We are an ILLiad Hosted site and OCLC hosts our email server and all our email notifications are going into our Junk Email folder
◦ We are an ILLiad Hosted site and we made a change in our Customization Manager for an email setting, do we need to contact OCLC to do anything?
◦ We are an ILLiad self-hosted site and our patrons are getting emails that we do not see on our server as going out
◦ We are a hosted site and we want to know what we need to do to switch from ILLiad Authentication to CAS Single sign on?
◦ We are hostied a hosted ILLiad site and our IP address is changing for our Network, do we need to update OCLC with our new IP address range?
◦ We are migrating our Database and want to know what kind of support we will get from OCLC?
◦ We are on an ILLiad Shared server and we are having troubles with one of our sites after we made edits to that directory on the Web Server
◦ We are unable to access the QueryAdditions.xml file on a shared drive for ILLiad
◦ We are upgrading our server to the latest version, and we want to know what kind of support we will get?
◦ We are using ISO ILL with ILLiad and when we try to start the service, it turns back off
◦ We borrowed a book and had to pay for it and now we want to know how to process the request in ILLiad?
◦ We cannot send or receive ILLiad Odyssey documents
◦ We can't connect to ILLiad or WorldShare ILL, is ILLiad down?
◦ We have an ILLiad backup Server and we are running the ILLiad Updater, but it is showing we have the latest updates when we do not have them
◦ We have an ILLiad Server Addon that we specify the date and times the addon should run, and it is hit and miss when it will run
◦ We just updated our Shared Server and when we try to print in ILLiad, we are not seeing the correct

https://help.oclc.org/Resource_Sharing/ILLiad
Printed: Thu, 28 Nov 2019 07:01:14 GMT
information in our print templates

- We just upgraded and some of our services are not starting after the upgrade
- We migrated our server to an ILLiad Test server which is now production and when we go to the logon.html page, it is pointing back to the old server
- We received an email that our SQL Server is moving to a new Address, what should do to be ready?
- We upgraded from 8.7.0.0 to 9.0.3.0 and when we open up the ILLiad Client, we are getting and error and cannot upgrade our ILLiad Client
- We use LDAP authentication and we have one user who is unable to logon
- We want to change the Required ID field associated with Registration so it requires nine or fourteen numbers
- What are the Default ILLiad email templates used for Notifications?
- What are the Hardware and Software Requirements for ILLiad?
- What are the Possible OCLC Statuses that will show up in the OCLC Status box in ILLiad?
- What are the requirements for upgrading an ILLiad server
- What are the server, Client, and Windows requirements for upgrading to ILLiad 9.0?
- What Data Sources are used for the different Word Documents
- What does Awaiting Article exchange Retrieval that I see in my Borrowing Queues mean?
- What does it mean when I see Awaiting Article Exchange Review?
- What do I do when I get a Transport-Level error in the ILLiad Client log?
- What do I do when returning a book I am finding that the lender on the book is not showing up in the system as the lender?
- What do I need to update if I am going to change the IP address of my ILLiad Server?
- What do I use in ILLiad to create a new Staff Account?
- What do the different Theme Selectors look like in ILLiad 9.0?
- What do we need to update if the IP address of our Web Server is going to change?
- What else do I need to do after updating the LendingDueDateDays in the ILLiad Customization Manager to have the new time period show up in ILLiad?
- What happens after I schedule an upgrade for our ILLiad Hosted Server?
- What hardware is needed? A separate server?
- What is the best way to set up a routing rule so that I want the action to be taken on any request that is not an OCLC request?
- What is the best way to work with a User account so we can test our Registration Page?
- What is the character limit for ILLiad Status Lines and can I use line breaks in the Key Value?
- What is the order for the Borrowing Overdues to go out to patrons?
- What is the process for incorrectly sent items from a Lender in ILLiad?
- What is the process for printing an Odyssey document when I am in the ILLiad Electronic Delivery?
- What is the proper procedure for decommissioning my ILLiad server when switching over to Tipasa?
- What is the proper procedure when I am a borrowing library and I have returned the book and the status is not at Request finished?
- What is the StaffProxyWebURL key used for in ILLiad?
- What ports are required for ILLiad?
- What should I do if a title is not in the Copyright Clearance Center, is listed as Special Order Required, or Contact Rights Holder Directly?
- What should I know if I want to switch from ILLiad to LDAP authentication?
- What should I plan to do if I am planning on switching to RemoteAuth Authentication in ILLiad?
- What should we add to our SPF record for emails coming from OCLC?
- What to do if you are seeing 401 Unauthorized error in the ILLiad Client?
- What to do when you notice your services are not running correctly on your hosted ILLiad server?
- What URL should be used to access WebCirc when you are Hosted ILLiad?
- What Windows permissions or Word settings should I be concerned with when using ILLiad?
- When a patron is trying to submit a request in the ILLiad Web Pages, they are getting a message about a required field that is not on the request form?
- When a patron registers, what form shows up on the Web?
- When can you use the Undo shipped Feature in ILLiad?
- When Clearing Users in ILLiad, how do I edit the email before it goes out?
- When did we start with ILLiad?
- When does the support for ILLiad 8.7 end?
- When in Borrowing in ILLiad and I am searching the OCLC tab, how do I get the most results when limiting by type?
- When is IFM billed in Lending when you are the Lender?
- When is the end of Life for all versions of ILLiad 8.7?
- When I am exporting WebReports with more than one report, information is not showing up in the exported Excel document?
- When I am in Awaiting Rapid Request Processing, and I click on the "Mark Found Scan Now" button and then Import document, ILLiad Freezes periodically?
- When I am in ILLiad and going to the Policies Directory, I see the sign-on screen and it does not take me into the Policies Directory?
- When I am in the Borrowing Work Form tab in ILLiad, I am unable to see the clear and delete buttons?
- When I am in the ILLiad Borrowing request, I do not see the Work Form tab?
- When I am in WorldCat, I see many holdings, but when I go to the OCLC tab in ILLiad, I only see a couple holdings?
- When I am on the Work Form to submit a request through ILLiad, the email address is not showing up?
- When I am printing ILLiad Lending requests, I am getting previous requests I printed?
- When I am scanning an article for Electronic Delivery and I am in the Scanner settings, I only see a Horizontal split option and not a Vertical split option?
- When I am searching OCLC for holdings in ILLiad, I am not getting many matches for results?
- When I am searching OCLC holdings from ILLiad, I see a column header of L with different letters under it and I am not sure what they mean?
When I am selecting requests to print I get a message about the requests added to a file, but it does not print the file
◦ How do I fix it so that when I check in a request, the status does not sit at "In Transit to Pickup Location" and the patron is not contacted?
◦ When I create a new User within the ILLiad, what notification preferences are automatically selected?
◦ When I deliver items through the ILLiad Electronic Delivery Utility, how do I fix it so I stop seeing a duplicate charge
◦ When I go to my Email Notification drop-down in ILLiad and click on it, nothing is happening
◦ When I go to my ILLiad Test web site I am redirected to my production site
◦ When I go to System, how do I fix it so I can see the Manage Addons icon?
◦ When I go to the Downloads page, when I click on the download, I get a page not found message
◦ When I look at the ILLiad Update Scheduler, why does it have my Server Version as a higher version then my ILLiad Client?
◦ When I open up a request in Borrowing, I do not see an ILL number in ILLiad
◦ When I open up a request in ILLiad, I am getting an error message with Microsoft.net Framework
◦ When I print in ILLiad, all the records show the same information in all the printout
◦ When I print in ILLiad, the Lender Address is not showing what I have in my Lender Address table
◦ When I send out the ILLiad Borrowing Password Reset email, the link is not showing up
◦ When I sign into the ILLiad Web pages using my Mobile Phone, I cannot see the tables that usually show up in the middle of the screen
◦ When I start up my computer, an ILLiad Window opens up with a Billing Manager icon and I would like to get rid of it
◦ When I submit a request for "Other" request, where does the information show up in ILLiad?
◦ When I update my ILLiad to the latest version, do I also have to update my ATLAS SQL Alias Manager settings?
◦ When I update the Address field in the User record in ILLiad, the field truncates at forty characters
◦ When I update the Header information on the ILLiad logon page, what other pages do I need to update?
◦ When I use Google Scholar and I try to import the PDF into Lending Scanning, the ILLiad Client shuts down
◦ When my patrons register and go to the Change User Information pages, I only want one state to show up for the option of state
◦ When opening the Billing Manager you are getting the error message that you are Unable to locate a logon settings file
◦ When printing in ILLiad, how do I know what fields are coming from the Local Info table so I can make updates to the Local info table to update the output?
◦ When processing Electronic Delivery in ILLiad, how do I deliver an item that shows up in the print box?
◦ When processing Odyssey Electronic Delivery, I get an error message on the screen
◦ When Searching in the ILLiad Customization manager for All Tables and Keys, does it search within Tables?
◦ When setting up OpenAthens for ILLiad, do we set it up as an LDAP or a RemoteAuth connection?
◦ When submitting a request in ILLiad, the verified field is missing when I am at the Workform
When trying to figure out what articles I need to add to copyright, does it include this year?

- Where are the Database and Log files for the SQL server stored?
- Where can I download a list of Default Printer Templates for ILLiad?
- Where can I find information on how to do a Custom Query in the ILLiad Client?
- Where can I get information on Copyright Clearance Center Get It Now?
- Where can I get the latest download of the Web Pages?
- Where can we find what are we billing for the different categories for our patrons?
- Where do I find information on the data source for the Print Templates in ILLiad?
- Where do I find the break down of the different fields in OpenURL such as jtitle, stitle, and so on?
- Where do I find the new ILLiad Documentation for the User Guides?
- Where do I go for the ILLiad Downloads of any of the software?
- Where do the fields that are showing up in the Notification templates point to?
- Where do the ILLiad Electronic Article cover sheets reside?
- Where do we go to request an enhancement for ILLiad?
- Where is there a Borrowing Workflow Chart for ILLiad?
- Why am I getting a queue called Awaiting Article Exchange Notification?
- Why am I not seeing Journals that I have had more than six requests in the top right of processing copyright?
- Why am I unable to add a new record in the ILLiadWebPlatformConfig table in the Customization Manager?
- Why aren't my Lending Overdue Notices going out?
- Why do I have a patron who is unable to submit requests?
- Why do some of my patrons have a Cleared field showing "New?"
- Why is the number for my Borrowing Turnaround Time report for Articles so low in ILLiad?
- Why to my WebReports change over time in ILLiad?
- Will ILLiad handle inter-campus requests?
- With some institutions switching from ILLiad to Tipasa, how do I make sure that electronic articles can get to them?