ILLiad

Get started

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Get started with ILLiad.

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

Troubleshooting

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

- After I upgraded to 9.0 on one machine, I am unable to logon with my username and password on a machine that is using 8.7.2.0.
- After upgrading to ILLiad 9.0, my barcode font is not printing
- After upgrading to ILLiad 9.0 how do I issue an IFM refund?
- After upgrading to 8.7.3.0 or 9.0.3.0, the lender is having issues sending Odyssey Documents to me for Docline Requests
- 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 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 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 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 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
◦ Decline Requests not Imported to ILLiad
◦ Do I need to be concerned with the logon or logon2 Web pages if I am using ILLiad Remote Authentication with EZproxy?
◦ Email Imports using Alma where the =09 show up at the end of each line of text.
◦ Finding and replacing the new Decline 6.0 scripts
◦ How can I fix a problem in ILLiad where I have one computer unable to connect to Decline?
◦ How can I get a report of my ILL Fees for Borrowing for ILLiad?
◦ How can I see in ILLiad the items that show up in WorldShare ILL as In Transit?
◦ 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 Patron Load work with ILLiad?
◦ How do I add and remove Delivery Locations in ILLiad?
◦ How do I add a group in the Group Maintenance for 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 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 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 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 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 logon to my ILLiad Web Site and I am getting an error message saying "Internal Server Error 500?"
◦ 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 not seeing all the fields in the Notes section of a request in ILLiad?
◦ 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 Considering?
◦ 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 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 Server Addon?
◦ 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 Decline requests that are delivered by Odyssey 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 schedule an upgrade for the ILLiad Hosted Server?
◦ How do I set it up so that Odyssey Requests are no longer sent automatically to the patron?
- How do I set up a Microsoft Access Link for the OCLC ILLiad Hosted Site?
- 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 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 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 migrate our ILLiad Server to a new server if we are self-hosted?
- 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 alternat port like 1344 instead of 1433 in the SQL Alias Manager?
- How do we update the Max Cost in ILLiad so we can respond Yes to a conditional?
- 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 sites backed up?
- How to delete an ILLiad Patron account?
- How to fix the errr 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 I install an ILLiad Client Addon?
- 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?
- 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 want the base URL for OpenURL for ILLiad, what do I use?
- If we are an ILLiad site, and we do not see an 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
- 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?
- 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?
- 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, how do I request a WSKey?
In ILLiad, I am trying to Renew a Borrowing request and nothing is happening
In ILLiad, my patrons are not getting notifications
In ILLiad, my screen display looks wrong
In ILLiad, no requests are coming in for lending can you fix it?
In ILLiad, is there a way to delete a patron's request history while keeping stats and collection data?
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 fix it when I am getting a failed notification for articles with long titles?
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, 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
Is there anything we need to do after adding an ILLiad Server Addon into the Customization Manager?
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 implement pop-ups to show up on certain borrowing requests that require special handling in ILLiad?
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 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 getting an error message with the ILLiad Fill Rate Statistics
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 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 having troubles updating my Direct Request Profile through ILLiad
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 on a shared server and I upgraded, but my ILLiad Connection Manager service will not start
- I am running the NCIP Cleint 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 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 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 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 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 a BookScan Scanner with ILLiad and I need the Username and Password it is requesting
- I am using ILLiad 8.7.2.0 and getting error messages every time I open up Lending Article Request
- 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 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 the password for my patron in the patron record in ILLiad, but the password does not work?
- I created a scheduled closure in ILL Policies, but my request keep on disappearing when I come back
- I have Borrowing requests stuck at Awaiting Direct Request Sending, how do I fix this?
- 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

https://help.oclc.org/Resource_Sharing/ILLiad

Updated: Sat, 22 Jun 2019 05:11:14 GMT

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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 delivery through Article Exchange

◦ I need help with an ILLiad Addon
◦ I need to install ILLiad on a new computer where do I get the file
◦ I need to manage the Addons, but I am unable to see the icon in the ILLiad Client
◦ 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 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 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 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 patrons are requested to change their password the first time they logon after I upgraded to ILLiad 9.0 and I am using ILLiad Authentication
◦ I am getting an IFM token error
◦ My Rapid Manager service is not sending or receiving
◦ 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
◦ Unable to change password for lender in ILLiad Client on a shared server site.
◦ Unable to send articles through the Bookeye Scanner
◦ Unique ID for installing ILLiad on a new Server
◦ We already use FirstSearch. Can we continue using it?
◦ We are an ILLiad Hosted site and OCLC hosts our email sever 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 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 hosted 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 unable to access the QueryAdditions.xml file on a shared drive for ILLiad
- 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 just updated our Shared Server and when we try to print in ILLiad, we are not seeing the correct information in our print templates
- We just upgraded and some of our services are not starting after the upgrade
- 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
- What are the requirements for upgrading an ILLiad server?
- 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 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 use in ILLiad to create a new Staff Account?
- 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 work with a User account so we can test our Registration Page?
- 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 know if I want to switch from ILLiad to LDAP authentication?
- 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 Clearing Users in ILLiad, how do I edit the email before it goes out?
- 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 the end of Life for all versions of ILLiad 8.7?
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 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?
- 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 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 logon to 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 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 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 send out the ILLiad Borrowing Password Reset email, the link is not showing up
- 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 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 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 find information on how to do a Custom Query in the ILLiad Client?
- 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 is there a Borrowing Workflow Chart for ILLiad?
- Why am I getting a queue called Awaiting Article Exchange Notification?
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?
- Will ILLiad handle inter-campus requests?