ILLiad

Query Search

• 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 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 statistics be output for import into Excel or Access?

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Can you make your own selection of required fields?

- Can you set up an expiration for the passwords in ILLiad 8.7?
- 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?
- 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 the Patron Load work with ILLiad?
- How do I add and remove Delivery Locations in ILLiad?
- 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 edit the Borrowing Cancellation reasons that show up in ILLiad?
- How do I enable Direct Request for ILLiad?
- How do I fix an error when printing in ILLiad that keeps on talking about setting up a table?
- 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 50000?"
- 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 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 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 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 up OpenURL for Alma using 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 submit the copyright order for 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 alternate 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 ILLiad Licenses can you have?
- How often are the ILLiad Hosted sites backed up?
- How to delete an ILLiad Patron account?
- 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 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 went the base URL for OpenURL, 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 Decline 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 Decline 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 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 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?
- 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 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 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

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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 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 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 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 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 delivery through Article Exchange
- 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 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 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 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 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 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 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 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 hardware is needed? A separate server?
- 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 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 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 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 opening the Billing Manager you are getting the error message that you are Unable to locate a logon settings file
◦ When processing Odyssey Electronic Delivery, I get an error message on the screen
◦ When setting up OpenAthents 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 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 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 is the number for my Borrowing Turnaround Time report for Articles so low in ILLiad?
◦ Will ILLiad handle inter-campus requests?