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).

- 9.1 RENEW BUTTON DOES NOT DISPLAY
- 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
- Am I able to delete the files in my Microsoft SQL Setup Bootstrap Update Cache on my ILLiad SQL Server?
- Are cancelling invoices permanent? Are you able to bill again after a cancelled invoice on the same item?
- Are there any changes that ILLiad needs to make when DOCLINE updates their Address on 8/12/2019
- Are there any issues with ILLiad and EFTS move to MLA?
- Are there any password history requirements when setting new passwords in ILLiad?
- Are there any plans of using IFM with Reprints Desk with ILLiad?
- Are there any Release notes for 9.1 yet?
- Are there WebReports that pull information from both Document Delivery and Borrowing?
- Article Exchange Addon no longer supported
- As a Lender, can I update requests that have a Special Message?
A borrowing site is sending books and emails to the wrong contact at our site, how do we fix this?

- A patron is getting an error message that says, "Error sending password reset email" when they click the forgot password link, how can I fix this?
- A patron is getting an error that says blocked due to invalid patron type, how can they regain access?
- A queue has disappeared in my Borrowing, Lending, or Document Delivery tabs. How can I see it again?
- 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?
- A user is noticing the OCLC number on a request changes after the request is sent, why is 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 hidden field be added to our Include Menu web page to specify a Document Delivery process type?
- 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 run under MacBooks?
- Can ILLiad SQL server run on the same server as an IIS Web server?
- Can ILLiad user SIP2 username with a barcode as the Username?
- Can ILLiad Web Circ or Web Reports be made to accept EZproxy Remote Authentication Credentials instead of ILLiad credentials?
- Can I add a pull slip to an article without printing the pull slip first?
- Can I add a Status tag to the logon.html Web page?
- Can I customize statistics from ILLiad database information?
- Can I edit a borrowing note after I've already sent it?
- Can I edit the borrowing notes of a request
- Can I submit a request for a User with Alma without having an ILLiad Username already created?
- Can I turn off the Web login unblocked key for an ILLiad user?
- Can I use the ILLiad 9.1 Web Pages on the 9.0 Web Server?
- Can I use the TestWeb site while using Remote Authentication in ILLiad?
- 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 shipping and Return labels pull from anywhere besides Constant Data?
- Can statistics be output for import into Excel or Access?
- Can the ILLiad WebCirculation be set up so it can check items in that are not at the status of "Checked out to Customer?"
Can the Odyssey notifications sent to patrons on electronic delivery be configured to use different templates for different patron categories?

◦ Can we bypass 9.1 and go straight from 9.0.4 to 9.2?
◦ Can we change the footer of our ILLiad Web Pages?
◦ Can we have two Web Servers pointing to the same Database?
◦ Can we run Get It Now only through EZproxy?
◦ 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?
◦ Change Password does not display the correct message in 9.1
◦ 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
◦ Docline 3.2.4.0 Automatic Update
◦ Docline 3.2.4.0 Automatic Update Not Putting Files In Correct Location
◦ Docline Requests not Imported to ILLiad
◦ Does anyone use the accounts named Atlas or OCLC in Staff Manager, or can we delete them?
◦ Does ILLiad have a limitation where you cannot have a password with blanks before or after the password?
◦ Does ILLiad keep track of when user accounts are created?
◦ Does ILLiad require Adobe Acrobat to open PDF files?
◦ 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?
◦ Does ILLiad Support Windows Server 2019?
◦ Does ILLiad User C++ for any of its components?
◦ Does our library need to provide you with updated IDM federation metadata for our hosted ILLiad install?
◦ Do I have to have a subscription to FirstSearch or WorldCat Discovery to be able to search OCLC with ILLiad?
◦ 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?
◦ Do I need to keep anything lower than Microsoft.net Framework v. 4.0 on my Web Server anymore?
Do I need to set up separate directories for the Odyssey Send and Receive folders when I am on an ILLiad Shared Server?

- Do I need to stop the web service and back up ILLiad for an Odyssey update
- Do SharePoint paths work in Customization Manager?
- Do the 9.1 Web pages support RSS feeds?
- Do we need a server restart after editing custom holdings
- Do we need to save our print templates before a hosted upgrade?

Editing Lending Web Pages

- Email Imports using Alma where the \=09 show up at the end of each line of text.
- Error 27506 and -1603 while attempting to run the ILLiad server installer
- 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 appears
- Finding and replacing the new Docline 6.0 scripts
- FTP Timeout for hosted ILLiad site
- Hosted ILLiad sites that want SFTP
- How are upgrades handled for hosted ILLiad sites?
- How can I automatically update Docline Scripts in ILLiad?
- 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 clear requests stuck in Awaiting OCLC Sending?
- How can I delete a user through ILLiad?
- How can I do a Custom Request search in ILLiad?
- How can I do a mass change Delivery Method options in ILLiad?
- How can I find out how a patron was created?
- 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 go directly to an Electronic Document that is at the Transaction Status of “Delivered to Web?”
- How can I move invoices from the print queue?
- 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 can I set up an ILLiad billing default for institutions for varying amounts?
- How can I set up a DLL log for the Web Pages so I can troubleshoot the Web interface issues?
- How can I set up a Group of ILLiad lenders that lend for free?
- How can I shut down my library so no one can Borrow or Lend from us in ILLiad?
- How can I test changes I made in the TestWeb folder when I am using EZproxy with ILLiad?
• How can our library make the Lending Web pages secure from libraries that are not yet approved?
• How can our patrons cancel requests that have already been processed?
• How can someone register with ILLiad Authentication when we are using RemoteAuth Authentication?
• How can we change our contact information for ILLiad upgrades?
• How does Article Exchange work in ILLiad?
• How does AutoClearPreRegisteredUsers work with new patrons authenticated through any other way than ILLiad Authentication?
• How does automatic user creation work in ILLiad?
• How does Delivery Method Per Item work in ILLiad for Loans?
• How does Email Routing work in ILLiad?
• How does ILLiad build statistics reports?
• How does ILLiad Copyright Clearance Work?
• How does ILLiad Exclusive work with the password when it is used to Validate users and upgrading to 9.0?
• How does the "Logon As User" button work in ILLiad?
• How does the ATLAS Authentication Portal work with ILLiad?
• How does the DaysBeforeElectronicDeliveryCleanup work?
• How does the Docline AutoUpdate feature work in ILLiad 9.1.2?
• How does the Patron Load work with ILLiad?
• How does the Status Tag work in 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 Authorized Users work with ILLiad?
• 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 key for the AddonLocations?
• How do I add a request manually for a patron in the ILLiad Client?
• How do I add lender addresses to Rapid requests?
• How do I add or edit information in the WorkformMapping table in Customization Manager?
• 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 add the Default Note to my cancellation notices in ILLiad?
• 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 Photo Journal Date shows Year and Month separately in an ILLiad incoming request from a patron?
◦ How do I build an OpenURL link from PubMed into ILLiad?
◦ How do I change an ILLiad Lending Library Password that is coming through the Lending Web Pages?
◦ 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 change the Web Session timeout in ILLiad?
◦ How do I clear the 1061 error that says Connection Manager cannot be restarted?
◦ 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 field on the Registration form and I want to see the field in ILLiad for Preferred Name
◦ How do I create a ILLiad Customization Manager shortcut on the desktop?
◦ How do I create a list of blocked institutions in ILLiad?
◦ How do I create a new Username to replace an old Username for RemoteAuth Authentication 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 customize the Copyright query so it uses six years instead of five?
◦ How do I delete Lending Transactions before a certain date such as 1/1/2016 from my ILLiad Database?
◦ How do I delete one patron with transactions?
◦ How do I delete users from my ILLiad Database?
◦ How do I deliver articles electronically in ILLiad?
◦ How do I disable all billing in ILLiad so we do not bill anyone for Borrowing Doc Del 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, Doc Del, and Lending Cancellation reasons that show up in ILLiad?
◦ How do I edit the phone number on all my outgoing ILLiad Email Templates?
◦ How do I enable Debug logging in the ILLiad Client?
◦ 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 mentions 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 an error message in ILLiad, "Request is in use by another user. Refreshing list?"

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 on the ChangeUserInformation Web Page in ILLiad, I am seeing a drop-down option for Hold for Pickup twice?

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 that when my patrons register, they have all their Notifications boxes checked?

How do I fix it so the due date does not change when sending a Renewal Request?

How do I fix it when an ILLiad site is sending notices to the wrong person at our library?

How do I fix it when I am getting an Odyssey Alert that says Notification Failed?

How do I fix it when I am getting a File in Use error message when I trying to print in ILLiad?

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 or History section of a request in ILLiad?

How do I fix it when I am part of a consortium and a lender billed me when they are not supposed to bill for reciprocal sites

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 when I am trying to deliver articles in ILLiad, I am getting a WebPlatform error message?

How do I fix it when I am unable to print and the ILLiad Client log shows me an error 0x800A9C64

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 printing in ILLiad, my mail merge is pointing to a wrong data source even though when I went to the Document outside of ILLiad and set up the data source correctly?

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 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 great amount of detail for the Connection Manager logs?
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 a quote if I want to start using 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 my institution added to or removed from a GAC group in the Policies Directory?
- 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 get the Lending Fill Rate Statistics for ILLiad and not the groups I have listed?
- How do I get to the ILLiad Web Pages for my site?
- How do I get accurate Borrowing Fill Rate Statistics in ILLiad?
- How do I include all the Journals requested for the Most Requested Journal Report for ILLiad?
- How do I increase the field length of the mobile phone field from 15 to 25 character in the Users table?
- 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 a new ILLiad Server, but it is not the latest version?
- 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 merge users in ILLiad?
- 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 or RAPID 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 process Doc Del Article Requests to scan later?
- How do I process Doc Del Loan Requests?
- How do I process items that I am going to receive as electronic articles?
- 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 respond to a Borrowing request for a Renewal?
- How do I route the queue "In DD Stacks Searching" into a Borrowing Transaction Status?
- 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 setup an SFTP connection to the Hosted ILLiad Server using WinSCP?
- How do I set a patron account to not be billed?
- 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 all articles coming in either through Odyssey or Article Exchange are sent to the patron automatically?
- 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 an SFTP connection with Filezilla to connect to my ILLiad Server?
- How do I set up a connection through SFTP that goes directly to a folder on the ILLiad server?
- How do I set up a custom query to find out all the patrons who email address does not match my institution?
- How do I set up a Custom Queue?
- How do I set up a custom search in ILLiad for Transactions with multiple User statuses?
- How do I set up a Microsoft Access Link for the OCLC ILLiad Hosted Site?
- How do I set up a print exception for the courier service?
- How do I set up a Z39.50 connection to Alma from ILLiad?
- How do I set up ILLiad Item Availability to work with my Knowledge Base?
- How do I set up Lending Returns to Automatically update?
- 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 Rush Processing in ILLiad?
- How do I set up shared server web pages?
- How do I set up Text Messaging in ILLiad?
- How do I set up the ILLiad Groups Maintenance in the ILLiad Client?
- How do I set up Web pages for specific Patron statuses in ILLiad?
- How do I set up Z39.50 to auto search when I open a transaction in ILLiad?
- How do I stop the Borrowing Pickup Reminder Server Addon from sending out notices?
- How do I submit a copyright order in ILLiad?
- How do I submit ILLiad Feedback?
- How do I turn on IFM for ILLiad?
- How do I uninstall and install the ILLiad System Manager and the Rapid Manager services?
How do I uninstall the ISO Manager and the ISO Service from my Self-Hosted ILLiad server

How do I update a Network path that ILLiad will use?

How do I update ILLiad on my server to 9.1?

How do I update ILLiad so that I can let the Lender know that I have Lost the book?

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 new 9.1 Web Pages with my Generic Requests that are part of the include menu.html?

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 add a link to an ILLiad email pickup notification that we want our patrons to see?

How do we change the patron password when we are using ILLiad Authentication?

How do we find out the size of our SQL Database when we are hosted by OCLC?

How do we fix the 9.1 Web pages notes field that is showing an incorrect time?

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 Manage the ILLiad Workflow for our patrons during a temporary closure?

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 different ILLiad pickup options for Loans?

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 long do Electronically Delivered articles live on the ILLiad server?

How many characters are allowed in the ILLiad Outgoing Email Notifications Subject field?
How many ILLiad Licenses can you have?

How many libraries use ILLiad?

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 I find out the symbols for the ILLiad Borrowing Web Report "Borrowing-Who We Borrow From" that show a percentage, but no symbol?

How to I update the ILLiad printout information so it has my new contact information like phone number, name, or email address?

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 message in our Print document that says the merge field is not in the data source, how can I fix it?

I am getting an IFM token error

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 am getting Microsoft.net framework error messages in ILLiad with Windows 10, how do I fix this?

If I am using Z39.50 with Decision Support Pipeline in ILLiad, what does Z39.50 check?

If I do not want to be charged for Borrowing, how do I set that up?

If I have multiple users who sign into ILLiad on one computer and I set up DEBUG logging, will I need to do it for each user on the computer?

If I need someone to help customize our ILLiad Web pages, who do I contact?

If I need to create a field on the patron request form in ILLiad that uses ItemInfo1 field, how do I do that?

If I need to edit an ILLiad Word Document Field, what is the best way to do this?

If I submit a request through API in ILLiad, will it count towards a patron's request limits?

If I update a Lending request from article to book in the ILLiad Client, does it change what the next library sees for the document type if I cancel the request?

If I update my WebPlatform API key in the ILLiad Customization Manager, do any services need to be restarted?

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 I want the Due Date that shows up in a Transaction to be a few days before the lender wants the item, how do I do that?
If I want to Limit the Borrowing Turnaround Time Report for only requests sent through Automated Request Manager, how would I do that?

If I want to save an article to a shared drive before sending it as a Lending request in ILLiad, how do I do that?

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 to have a disaster preparedness plan for ILLiad, what should we consider?

ILLiad: Does upgrading the ILLiad Client break our ODBC links for MSSQL?

ILLiad 9.1 ChangeUserInformation page Drop-Down options in Alphabetical Order

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 from EZproxy to ILLiad

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

ILLiad has New OCLC Profile Groups Available in Response to COVID-19 Conditions

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

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 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

- 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
- ILLiad Web Circulation URL address HTTP is not working
- 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 9.1, there is a message on the ILLiad Main Menu that says "Choose an option from the choices below..." how can I edit that?
- 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 9.1, I am not longer able to update my OCLC Resource Sharing settings in the ILLiad Client
- In ILLiad 9, where do we add a formstate tag to the documents that it talks about in the Release Notes?
- In ILLiad, as of January 1, 2020, DOCLINE is changing their URL and this is what you need to do to fix your DOCLINE
- In ILLiad Docline, can I bill through IFM or Invoice or do I need to use EFTS?
- In ILLiad, how do I accept a a conditional where I need to increase my Max Cost?
- In ILLiad, how do I add a Lender who is not in the list of OCLC Potential Lenders?
- 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, my screen display looks wrong

In ILLiad, no requests are coming in for lending can you fix it?

In ILLiad, what does Awaiting Odyssey Sending queue mean?

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 ILLiad, when we try to go to go the PDF file directly, we are getting an Authentication error message

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

In the ILLiad 9.1 Web pages in the ViewDefaultDetailed.html page it is correct, but the popup when you mouse over the status showing in the ILLiadMainMenu page, it shows a time that is different than what is in the Tracking table

In the ILLiad Client, why do some requests occasionally show up with no loan information?

In the ILLiad Lending Transaction Queues, what is "Web Request Created?"

In which table is the information from the Imported Request tab pulling from in the ILLiad SQL Server?

Is ILLiad able to edit PDFs?

Is ILLiad Compatible with TLS 1.3?

Is ILLiad compatible with Windows 11?

Is it okay if I set up a Custom queue for Items Recalled from Customer, or will this cause issues?

Is it possible for a user who has been disavowed in ILLiad to still send requests?

Is it possible to add a separate agreement to polices form before or after patrons get to the request stage online?

Is it possible to configure our OCLC hosted ILLiad server to write debug logs to a sub-folder?

Is it possible to get ILLiad statistics by Department and User Status?

Is it possible to get separate SFTP credentials for testweb?

Is it possible to point the SQL Alias Manager to two separate ILLiad Databases

Is it possible to use a SAML connection to authenticate users into their ILLiad accounts without the use of EZproxy?

Is it possible to use multiple scanners and import PDFs directly into the lending queue?

Is my IP address range covered for my ILLiad hosted site?

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 any online training for ILLiad?

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

Is there an ILLiad client for Mac users?

Is there a “last day” OCLC will provide support for incremental updates, for example 9.0.3?

Is there a complete list of Customization Keys in Customization Manager?

Is there a list of Default ILLiad Transaction Statuses that a patron sees on the Web?

Is there a list of Libraries that have a safe return of physical items?

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 I can restrict access to ILLiad WebCirc or WebReports by IP address?

Is there a way that I can send out only the Borrowing and Lending First Overdue Notice and not any others?

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 automate the Awaiting Request Processing queue to route to a sharing group after clicking the "No Problem" button?

Is there a way to block expired users from submitting requests?

Is there a way to change the default internet browser ILLiad opens links in within the Client or Customization Manager?

Is there a way to change the document type for loan requests?

Is there a way to edit a request that is not in the status of Request Sent?

Is there a way to edit the template that is generated from the ILLiad Billing Manager when running the Overdue Letter reports?

Is there a way to fix a request when I accidentally processed an ILLiad Borrowing request as Doc Del?

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 prevent article and loan information from accidentally populating for each other?

Is there a way to process renewals automatically while remote working in ILLiad?

Is there a way to reroute the article sent to the library's email, so you can process it through the ILLiad Client?

Is there a way to set location for scanning process type?

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

Is there a way we can access the Copyright Clearance Center other than through ILLiad?

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

- It is the end of the calendar year and I am trying to say yes to a renewal request and the Connection Manager is giving me an error message
- I accidentally copied the OCLC number over the ILL number in a request, how can I track it?
- I accidentally downloaded the latest version of ILLiad but then uninstalled it. After installing the correct version, the client does not open
- I added a Delivery location and now when I get to the Workform, I get an error message
- 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 borrowing from DOCLINE and some ILLiad sites are not sending me emails with the Article Exchange link
- I am getting an error about the Images path and I cannot open up the ILLiad Customization Manager
- I am getting an error in TestWeb trying to view a PDF, what's causing this?
- I am getting an error message on my TestWeb site: The resource you are looking for has been removed, had its name changed, or is temporarily unavailable
- 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 with the ILLiad Fill Rate Statistics
- I am getting an error retrieving status when looking at a Borrowing Request in ILLiad
- I am getting an error when I run the ILLiad WebReport for Borrowing Requests by Department and User Status
- I am getting an SQL "Named Pipes Provider" Error when trying to open Billing Manager, what steps can I take to solve this?
- I am getting an uninstallation error message when trying to upgrade from 9.0.3.0 to 9.0.4.0
- 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 missing logon file message when I try to open up ILLiad
- 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 script error in ILLiad showing ssl.gstatic.com when connecting to Docline
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 going to have OCLC Host my Email Server for ILLiad, what Customization Manager changes do I need to make?
I am having an issue with the Article Exchange requests in ILLiad showing up as Odyssey Document Received
I am having an issue with the Article Exchange requests in ILLiad showing up as Odyssey Document Received
I am having a long lag when printing with ILLiad and Microsoft Word
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 9.1 and when I try to deliver an article in Borrowing, it gives me an error message
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 have a choice to Finish and Merge
I am logged into the ILLiad Web pages and getting the error, "You may only view transactions that belong to you" when requesting a loan.
I am migrating from ILLiad to Tipasa, but my Workflow needs an ID field to submit requests because I am getting a message about having a Patron ID field
I am missing one of the Default Notification Templates for ILLiad, how can I get it back?
I am no longer seeing the listing of my different print files under the Printer Setup screen in ILLiad
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 and we cannot find a username who submitted a request on any of our sites
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 opening my Lending Request for the first time in the status of In Stacks Searching in ILLiad, but the Due Date is not showing
I am printing in ILLiad and there is information showing up on the page and I do not see a merge field in that area of the unmerged document
I am printing my Lending Shipping Labels and the system locks up and gives me an error message
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 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 in the ILLiad Client, but I do not see the field I want when I go to the Hidden Items tab
- I am trying to get into my OCLC Resource Sharing Settings in ILLiad 9.0, and I am getting an error message
- I am trying to get into Web Circulation and I am getting an error message
- I am trying to print a document in ILLiad and I am getting a message that the file cannot be found
- 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 process Odyssey Requests and I get a message about Entity too large
- 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 send a lending request, but it is not updating from considering
- 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 change delivery pickup locations on my web pages, how can I change this?
- I am unable to connect to Docline within ILLiad, how can this be resolved?
- I am unable to download PDFs to a mapped drive while working from home. What could cause this?
- 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 see any shared drives while using ILLiad, but other computers can
- 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 updating my GAC table in the Customization Manager and I am getting a message about it updating all the sites on my shared site, is that okay?
- I am updating my Registration page and removing some Departments from the list, will this cause a problem with the users that have those departments in their user record?
- 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 9.1 or higher and I need to set the ISO log for Debug, how do I do that?
◦ 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 am using the ILLiad 9.1 Web pages and when I use the Forgot Password on the logon page, I do not get a confirmation message
◦ I am working from home and today ILLiad is slow responding
◦ I am working remotely with ILLiad and I am able to connect, but I am getting a slow response time
◦ I billed an institution for IFM and it is not showing up on our IFM Monthly report
◦ 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 find an invoice in the Billing Manager for my patron who I billed
◦ I cannot see any entries in the Events Log in the ILLiad Client
◦ I cannot see the Transaction Number when I click on a queue, how do I find it?
◦ 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 checked an item in from the Lending Library, and when I print receives nothing prints
◦ 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 downloaded the DOCLINE Scripts for 3.2.0.0, and the PatronName is blank and the AuthorizedBy field is incorrect
◦ I do not see the Reason why my Direct Request (Automated Request Manager) failed to go out because there is nothing showing in my notes field
◦ I forgot my SA Password for ILLiad, how can I update the password so I know what the password is?
◦ I forgot to bill for a Lending request and it did not show up in the Billing Manager, how do I fix this?
◦ 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 an item I want to deliver electronically in ILLiad, but it is showing in the print box
◦ I have an item stuck in the status of "In Electronic Delivery Processing"
◦ I have a bunch of items in Awaiting Post Receipt Processing in ILLiad and I only want to print some of them, how can I do that?
◦ I have a Custom Holdings group and I cannot add a symbol to it when in the ILLiad OCLC Resource Sharing settings
◦ I have a regular user of ILLiad, but I can only find one request
I have a remote connection to my computer and I need to close down ILLiad Client that is stuck, but Control Alt Delete is not working
◦ I have a request in ILLiad that will not get out of a queue and it should be Request Finished
◦ I have a request that went out to Docline, but the SystemID shows OCLC
◦ I have a user in ILLiad who is not able to complete registration using Remote Authentication and the UserValidation table
◦ I have Borrowing requests stuck at Awaiting Direct Request Sending, how do I fix this?
◦ I have forgotten my password for the ILLiad client. How can I regain access?
◦ I have lost my refresh button in ILLiad
◦ 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 added a new Website for a Delivery Location, but I am getting Error messages about the DLL when I sign in
◦ 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 and when I try to sign into my Web Page, I am getting a message about the resource has moved or not available
◦ 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 moved my install directory from the c-drive to the e-drive and after I ran an update and some of my services are not starting
◦ I'm getting an error when I try to print in ILLiad, why is this?
◦ I need help with an ILLiad Addon
◦ I need help with ILLiad WebPlatform API
◦ I need the Username and password for the Server Installer
◦ I need to add the Country field in the ILLiad Registration and ChangeUserInformation pages, how do I do this?
◦ I need to change the Lending and Borrowing Due Dates for ILLiad, how do I do this?
◦ I need to have the patrons update all the patrons accounts to our email domain, what is the best way to do it?
◦ I need to install ILLiad on a new computer where do I get the file
◦ I need to install the ISO Manager because it is missing in my services
◦ I need to know the number of requests that a patron submitted by using the request form and enter the

https://help.oclc.org/Resource_Sharing/ILLiad
Printed: Sat, 04 Dec 2021 14:55:21 GMT
information manually and all other requests in ILLiad

- I need to know the process for using the Institutional login with Docline with 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 a typo in a request that appeared in the Copyright Clearance queue in ILLiad. I'm worried it will affect reporting. Is there a way to correct it?
- I noticed several old files in Test Web aren't carried over when we upgrade, is it safe to delete the files 9.1 doesn't use?
- I noticed there is "IFM Charges" report in the ILLiad Reports, under Lending. Is there one under Borrowing?
- I only want users to use their campus domain emails. Is there a way I can block my patrons from using their personal emails?
- 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 an item and yet my patrons still get overdue notices in ILLiad
- I said Yes to a Borrowing renewal, but they are not updating OCLC, what do I need to do?
- I see an ILLiad routing option called Route to Document Provider Processing. What does that mean?
- I see a request is showing the OCLC Status as supplied, but I never received the item
- I see a request where the Send Via Odyssey button is grayed out, why is that?
- 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 a validation string for my Registration formname for WebValidation, but my RemoteAuth Authentication is allowing everything through
- 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 updated ILLiad to a newer version, but the Customization Manager is getting an error message when I try to open it
- I upgraded my Hosted ILLiad Server and my Microsoft Access scripts are not working
- I upgraded my ILLiad server and now when I try to sign in to ILLiad, I get an error message saying that the file is missing
- 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 a WebReport of the number of Borrowing requests that have been closed in ILLiad over a period of time?
- I want to add a hidden field on the ILLiad Registration form so that everyone has Electronic Delivery is "Yes." how do I do that?
- I want to delete patrons using the ILLiad Database Manager, but my query gets no results
I want to get a custom report within ILLiad, how can I do this?
◦ I want to imbed a link to ILLiad on a page, what URL do I use?
◦ I want to know how to copy your ILLiad Client Layout to all the other Librarian's clients
◦ 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 want to set up a redirect on my ILLiad Logon.html page so that my patrons go to our EZproxy sign-in page and then forward to ILLiad
◦ I want to test my ILLiad Web Validation syntax, where is a good place to go to do this?
◦ I was asked to upgrade the ILLiad Client today and I am getting an error 1625 that stops the upgrade
◦ I would like to know the Cost and Benefits of being Hosted by ILLiad?
◦ I would like to know who I contact to get a demonstration for ILLiad?
◦ I would like to request that an IP range be opened up for ILLiad client access at one of our new sites?
◦ Java script error trying to login to Docline
◦ The libraries.oclc.org shows we are not lending or accepting returns how can we update our status on this page
◦ 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 emails are getting an error message about Relay and not going out on my OCLC ILLiad Hosted site
◦ My ILLiad Column Headers are not displaying correctly
◦ 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 password to log into the ILLiad Client is correct, but when I try to enter it, I get a message saying the password is incorrect. Why does this occur?
◦ My patrons are getting a message about being Locked out about too many login attempts, how can I fix this?
◦ 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 getting an error message about PDF not found
◦ 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
◦ My Rapid Manager service is not sending or receiving
◦ My Overdue notices are not going out
◦ New Procedure for updating ISO in ILLiad 9.1
◦ None of my emails are going out and I see in the email note that it says Connection Failed, how do I fix this?
None of my Flags or Notes are showing up on my Lenders Page in my ILLiad Client
◦ None of my ILLiad Services are running and my SQL Server is on a different server
◦ None of our patrons are able to sign in with ILLiad Web pages with LDAP today
◦ 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 email system requires SSL, how can we make our ILLiad emails secure?
◦ Our ILLiad Client keeps on crashing all day, can we have the ILLiad Server restarted?
◦ Our ILLiad Email links are showing a non-secure http address and we need them to show https because we are a secure site
◦ Our library has a standard system ID for all of our users, however users keep forgetting to use them or use them incorrectly. Can library staff change usernames in ILLiad to grant everyone access?
◦ Our RemoteAuthValidation table is correct after upgrading to ILLiad 9.1, but we still can't access our web pages
◦ 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
◦ Setting up Remote Authentication in ILLiad 9.1
◦ Since we updated to ILLiad 9 we have not been able to use Undo shipping feature on any of our requests?
◦ Steps needed to block (deflect) loan request and only process electronic items
◦ There are items stuck in Awaiting Direct Request Sending
◦ The borrowing location does not have my correct address in their ILLiad Client for my Lender address
◦ The constant data in our workform is not adding an email address, how can I fix this?
◦ The ILLiad PDF Viewer Addon is not pointing to the PDF folder, how do I fix this issue?
◦ The import folder shows an error when trying to SFTP for a Patron Load
◦ The request window only opens in a minimized tab along the toolbar, why is this occurring?
◦ The Transaction Date format is incorrect in the ILLiad Client
◦ Troubleshooting connectivity issues for ILLiad OCLC Hosted sites
◦ Unable to change password for lender in ILLiad Client on a shared server site.
◦ Unable to login to Decline in ILLiad
◦ Unable to Open a PDF in the ILLiad Client
◦ Unable to send articles through the Bookeye Scanner
◦ Unique ID for installing ILLiad on a new Server
◦ Web Alerts not working in 9.1 ILLiad Web pages
◦ We already use FirstSearch. Can we continue using it?

https://help.oclc.org/Resource_Sharing/ILLiad
Printed: Sat, 04 Dec 2021 14:55:21 GMT
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 an ILLiad self-hosted site and our patrons are getting emails that we do not see on our server as going out
- We are an ILLiad Self-Hosted site and we would like to know about creating a backup server
- We are an ILLiad hosted site and we added or modified a Server Addon, what do we need to do now?
- We are 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 a Hosted ILLiad site and we cannot FTP or SMTP with the server
- We are a hosted site. Do we need to manuallly download the ILLiad upgrade?
- 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 a hosted site. Do we have to do the manual update for 9.1?
- We are a RemoteAuth ILLiad library seeing duplicate requests, how can we fix this?
- We are a shared ILLiad site, why is one of our sites not receiving any Rapid requests?
- We are a shared server on ILLiad 9.1 getting an error message in your Rapid log regarding the RapidPrimaryLendingDownload Customization key
- 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 updating our domain and we need to know what we need to do in 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 billed a site through EFTS and DOCLINE and need to remove the bill before the end of the month
- 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 Server Addon that we specify the date and times the addon should run, and it is hit and miss when it will run
- We have an ILLiad 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 a patron who says he is not receiving an email that we see in the ILLiad Email History that it shows the email successfully sent, what do we do next to troubleshoot the issue?
- We have not received any new lending requests in ILLiad today
- 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

https://help.oclc.org/Resource_Sharing/ILLiad
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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 need our ILLiad Services Disabled on the Hosted Server
- We need to disable ILLiad Odyssey, how do we do this?
- We need to restart our server because we haven’t received new requests in a few hours and there are many new ones in Worldcat Resource Sharing that haven’t pulled in
- We received an email that our SQL Server is moving to a new Address, what should do to be ready?
- We received an ILLiad Book Chapter Article request as a book and loan, how do I fix it so the correct Word Document shows up?
- 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 upgraded to 9.1 and when a patron signs in for the first time, the patron sees a bunch of error messages on the registration form
- We use LDAP authentication and we have one user who is unable to logon
- We want everyone to login to ILLiad with their LDAP passwords. How can we stop password reset notifications being sent to new users?
- We want to change the Required ID field associated with Registration so it requires nine or fourteen numbers
- We want to delete our Disavowed Users and also keep all their transaction information in ILLiad
- What are my options if I want to use Interlibrary Loan, but I am not going to use ILLiad?
- What are some basic ILLiad Server Addons troubleshooting I can do?
- What are some general ILLiad Webplatform troubleshooting I can do?
- What are the Default ILLiad email templates used for Notifications?
- What are the Hardware and Software Requirements for ILLiad?
- What are the hours I should call ILLiad Support in the United States if I want someone on the phone?
- 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 are the steps I need to take for ILLiad if I am updating my OpenURL to a new location to test, but then I need to go back to the old URL?
- What customization key in the Customization Manager allows for languages other than English on default request pages?
- 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 if I borrowed an article in ILLiad, but the lender marked it as a loan, but sent me the electronic article?
- What do I do in ILLiad when a library sends me the wrong item that does not match their paperwork?
- 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 do to Configure RAPID to work in ILLiad?
◦ What do I need to do to set up my ILLiad Server Configuration and Permissions?
◦ 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 or modify a Staff Account?
◦ What do the different Theme Selectors look like in ILLiad 9.0?
◦ What do we do when a lender shipped an item and it is showing as Unfilled in ILLiad?
◦ 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 happened to the Article Exchange Custom in the OCLC Service Configuration?
◦ What happens after scheduling an upgrade for our ILLiad Hosted Server?
◦ What hardware is needed? A separate server?
◦ What ILLiad users need to know about OCLC’s upcoming TLS security enhancements
◦ What information is retained on the ILLiad servers from our Patrons?
◦ What is a good way to Troubleshoot the ILLiad Connection Manager?
◦ What is ILLiad ISO?
◦ What is my ILLiad Server IP address?
◦ 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 test some new Webpages when I am on a shared server?
◦ 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 difference between OCLC Status: Submitting and OCLC Status: Considering?
◦ What is the difference between WorldShare ILL and ILLiad?
◦ What is the difference in ILLiad between Request Finished and Delivered to Web and are they both considered filled?
◦ What is the DisplayStatuses table used for in ILLiad?
◦ What is the ILLiad Directory structure on the Web Server?
◦ What is the ILLiad RemoteAuth Authentication process?
◦ 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 process for updating to the latest server in ILLiad
◦ What is the process our patrons use to Cancel a request in ILLiad?
◦ 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 key in Customization Manager toggles automatic renewals?
• 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 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 to know before switching from ILLiad to LDAP authentication?
• What URL should be used to access WebCirc when you are Hosted ILLiad?
• What Webform 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 do I need to restart an ILLiad Service?
• 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 ILLiad 9.0?
• When is the next month's scheduler released for hosted ILLiad updates?
• When I am exporting WebReports with more than one report, information is not showing up in the exported Excel document.
• When I am in an ILLiad WebReport where there are titles, why is it that I see the same title multiple times?
• 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 ILLiad and trying to send a Notification, I am getting an error message that the Notification cannot be found.
• 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
- When I am setting up the ILLiad Services, what Startup Type should we use?
- When I am trying to download the ILLiad Client or the Database Manager, I am asked for a Username and Password
- When I am using an OpenURL link into ILLiad, what Web page is presented to the patron?
- 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 get my Z39.50 holdings through Lending, how can I get the results that have at least one holding?
- When I go to my Email Notification drop-down in ILLiad and click on it, nothing is happening
- When I go to my ILLiad Testweb 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 have tested my Web pages in the TestWeb folder and I want to move them over to production, what is the best process to do this?
- When I look at the ILLiad Update Scheduler, why does it have my Server Version as a higher version than my ILLiad Client?
- When I open the ILLiad Client, I am getting the message "An error occurred loading the main form."
- 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 receive a document in ILLiad it shows up blank, but after delivery, the patron can see it fine
- 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 try to open ILLiad, I see a Corrupt User Setting error. Should I select Yes or No?
- When I try to use my ILLiad Addon, I am getting an error message that Internet Explorer is not supported
- 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 Lending Returns in ILLiad, the External Status box is blank
- 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 sending ILLiad articles through Lending, is there a copy of what was sent kept on the server?
- 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 submitting the Format in the Multimedia request form, the format I chose is not showing up, but only Multimedia is showing in the ILLiad Client
- When trying to figure out what articles I need to add to copyright, does it include this year?
- When using the Multimedia Request form, where does the format of an item show up in the ILLiad Client?
- When we finished with our upgrade, the SQL Alias Manager appeared, do we need to do anything with that?
- When we have an ILLiad Upgrade, are our Web pages automatically upgrade?
- Where are the Database and Log files for the SQL server stored?
- Where are the System Manager log and other log files stored?
- Where can I download a list of Default Printer Templates for ILLiad?
- Where can I edit the CustomDropDown table in ILLiad?
- Where can I find information about ILLiad LDAP settings?
- Where can I find information on how to do a Custom Query in the ILLiad Client?
- Where can I find out when ATLAS will release a new ILLiad version?
- Where can I find the ILLiad Workflow charts for Borrowing, Document Delivery and Lending?
- Where can I get a list of the different Email fields that can be inserted into Notification template
- Where can I get a list of the different possible Merge fields that can be used with an ILLiad Print Document?
- Where can I get information on Copyright Clearance Center Get It Now?
- Where can I get information on the ILLiad Decision Support Pipeline?
- 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 create or Edit ILLiad Email Templates?
- Where do I find information on the data source for the Print Templates in ILLiad?
- Where do I find my Pickup Locations in the Customization Manager?
- 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 ILLiad Filter Editor?
- 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 groups come from that show up on my Lender Address screen on the top right?
- 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?
- Where to find profiled Groups and edit them in ILLiad?
- Where to save scanned files for processing Electronic Delivery
- Which functions within ILLiad require admin privileges?
- Why am I getting a queue called Awaiting Article Exchange Notification?
- Why am I getting a Transaction Status of Awaiting Duplicate Review?
- Why am I getting the message "Request in process by another user. Refreshing list" when I try to open a request in ILLiad?
- 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 are the LendingReasonsForCancellation records I created showing as "unspecified" when I try to use them?
- Why are the OCLC Usage Statistics showing as my reason for Cancellation as Unspecified when I used Publisher Embargo for ILLiad?
- Why do I have a patron who is unable to submit requests in ILLiad?
- Why do I have to change my ILLiad Staff Password every so often and how can I make it so it does not have to be changed?
- Why do I see a number in the Barometer that doesn't match any numbers in my queues?
- Why do my WorldShare ILL Statistics and my ILLiad Statistics not match up?
- Why do requests show up in the Awaiting Copyright Clearance queue?
- Why do some of my patrons have a Cleared field showing "New?"
- Why do the two dropdown options on my web page for "Will you accept an alternate edition of this item?" both say "No??
- Why has the contact email disappeared from our constant data for ILLiad workforms?
Why is it that the number of requests I have in ILLiad is different than what I have in WorldShare?
- Why is the number for my Borrowing Turnaround Time report for Articles so low in ILLiad?
- Why do my WebReports change over time in ILLiad?
- Why would we need to connect to the ILLiad Hosted server?
- Will ILLiad handle inter-campus requests?
- Will our ILLiad requests be processed normally following the upgrade for our Hosted site?
- Will OCLC edit our ILLiad Web Pages for us for a fee?
- With some institutions switching from ILLiad to Tipasa, how do I make sure that electronic articles can get to them?

- ILLiad media repository

No image available