Find support materials about Relais ILL.

• **Get started**

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  Get started with Relais ILL.
  
  ◦ Hardware migration for Relais Hosted service
  ◦ OCLC
  ◦ Staff logins

• **Relais Portal**

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  Find information about the Relais Portal in Relais ILL.
  
  ◦ Relais Portal for patrons and other libraries
  ◦ Relais Portal for staff
  ◦ OpenURL
  ◦ Multilingual options
  ◦ User Authentication web service

• **Relais Web services**

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  Find information about Relais web services which are available for a number of Relais ILL features and functions.
  
  ◦ Web services overview
  ◦ Add Request
  ◦ Authentication
  ◦ DiscoverItem
  ◦ Find Item
  ◦ Request Query
  ◦ RequestItem
  ◦ Sandbox
  ◦ Search catalog

https://help.oclc.org/Resource_Sharing/Relais_ILL
Printed: Thu, 20 Jan 2022 16:49:55 GMT
• Authentication

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Find information about authenticating and authorizing users in Relais ILL.

◦ Authentication and authorization
◦ Encryption
◦ Patron authentication using a third party system
◦ Security in Relais

• Patron records

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For each patron that submits a request into Relais ILL a patron record must exist. Patron records created in several different ways, including patron registration, self registration, patron load, and NCIP.

◦ NCIP generated patron records
◦ Patron load
◦ Patron merge
◦ Patron registration
◦ Patron types

• Library and Supplier records

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◦ Library registration
◦ Sequencing tiers and suppliers
◦ Supplier registration

• Receive and enter requests

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Relais ILL supports multiple options for entering and receiving requests, both from your own patrons and from other libraries. Irrespective of which method is used to enter or receive requests, all requests follow the appropriate processing rules.

◦ Entered by staff
◦ Flat file using LoadRequest
◦ From DOCLINE
◦ Pass to Relais
◦ Received from other libraries

• Send requests

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Learn how to configure and send requests and copyright statements in Relais ILL.

- Configure requests
- Copyright statements
- Send requests with supplier and patron information
- Suppliers requiring use of their web form

**Serials Solutions 360 Link lookup**

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Find information for Relais ILL users who subscribe to Serials Solutions 360 Link.

**ISO transactions**

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Learn how to send ISO transactions as the sending and requesting library in Relais ILL.

- When you are the requesting library
- Send ISO requests and messages
- When you are the supplying library

**NCIP**

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NCIP (NISO Circulation Interchange Protocol) is a North American standard which allows disparate library systems to talk to each other. Find information about configuring Relais to communicate with your institution's library system via your NCIP server.

- Alma interoperability with Relais ILL
- Configure your library system
- Configuring NCIP in Relais ILL
- Generic NCIP Testing
- NCIP AcceptItem message
- NCIP CheckinItem Message
- NCIP CheckoutItem message
- NCIP Implementation Checklist
- NCIP Overview

**Loan items and manage loans**

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Find information about loaning items, including configuring loan codes and policies, sending notices, and recalling items in Relais ILL.

- Configure loan codes and policies
Loan an item (using Windows Login)
- Open a request in Loan Tracking
- Pickup notices
- Recalls (with Alma and NCIP)
- Recall a loan
- Renewals (with Alma and NCIP)
- Reopen a loan request
- Send overdue notices
- Wrong item supplied

• Supply documents

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Find information on supplying documents to your own patron or another library as well as configuration options for scanning documents.
- Additional configuration options for Scanner 7
- Configure scanner for Windows 7

• Administration

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Find information about Administration for Relais ILL.
- Audit records
- Automatic scheduling
- Check in a request
- Configure Add Document
- Configure audit records
- Configure loan status
- Configure Lookup options (in Receive FTP)
- Database, tables and SQL queries
- Daylight Savings Time
- Define defaults for sending loan notices
- Field lengths
- Modify staff Login options
- Purge and Archive
- Relais web schema
- Use tokens
- Web Pages - Session Timeout Redirects
Deliver documents

Learn how to deliver documents and configure cover pages, email attachments, and pickup locations in Relais ILL.

- About document delivery
- Configure delivery to Odyssey
- Cover pages
- Delivery Email to Fax
- Email attachment
- Pickup
- Post to Web

• Pickslips

Learn how to print and email pickslips in Relais ILL.

- About pickslips
- Configure a printer
- Configure Email Request
- Configure print requests
- Summary sheet for pickslips

• General messages

Learn how to configure and send general messages in Relais ILL.

- Configure general messages
- Send general messages

• Edit Requests

Learn about the available functionality in the Edit Request window in Relais ILL.

• Search catalogues

Find information about configuring search options, Search Auto, and Search Manual in Relais ILL.

- Search catalogues overview
- Configure catalogues
- Configure search options
  - Search Auto
  - Search Manual

- **Routing lists**
  
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  Learn how to use routing lists and search for locations in Relais ILL.
  
  - About routing lists
  - Search for locations

- **Update requests**
  
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  Learn how Request Processing is used and how to open a request in Relais ILL.

- **Relais File Transfer Service (RFTS)**
  
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  Learn about Relais File Transfer Service (RFTS) in Relais ILL.
  
  - About RFTS
  - Allow RFTS through a Windows 7 firewall
  - Migrate RFTS from Windows XP to Windows 7
  - Upgrade the RFTS

- **Notify patron**
  
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  Learn how to use Notify Patron in Relais ILL.
  
  - Use Notify Patron
  - Configure Notify Patron messages
  - Configure Patron Response page
  - Patron Response page
  - Updates to requests

- **DocStore**
  
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  Learn how to deliver documents to DocStore from Relais ILL.

- **Reports**
  
  No image available
Learn about reporting functionality in Relais ILL.

- COPPUL report

- Relais supplying
  
  No image available

  Learn how to receive, process, and deliver requests in Relais ILL.

- Relais 2020.x
  
  No image available

  Find information, including installation and upgrade instructions, for Relais version 2020.x.

  - Relais 2020.x Overview
  - Application, service and dll versions
  - Install and upgrade for Relais ILL

- Relais 2019.x
  
  No image available

  Find information, including installation and upgrade instructions, for Relais version 2019.x.

  - Relais 2019.x Overview
  - Application, service and dll versions
  - Install and upgrade for Relais D2D
  - Install and upgrade for Relais ILL

- Relais 2016.x
  
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  Find information, including installation and upgrade instructions, for Relais version 2016.x.

  - Relais 2016.x Overview
  - Application, service and dll versions
  - Install and upgrade for Relais D2D
  - Install and upgrade for Relais ILL

- Relais ILL release notes and known issues
  
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  Find Relais ILL release notes and known issues. Release notes are documents that contain information about new product features and enhancements as installed in scheduled releases.

  - 2022 Relais ILL release notes
  - 2021 Relais ILL release notes
2020 Relais ILL release notes

- Known Issues
- Relais Portal updates

- Troubleshooting

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

- Are the login credentials case sensitive?
- Can a full header and footer be added to the pages?
- Can the wording used for the request status, e.g., Submitted, In Process, On Loan, Unfilled, Complete, be modified?
- Can we choose what is displayed in the history?
- In the request templates, is 'Requester Info' used to enter the end user id in Library requests?
- In the request templates, is 'Request Source' used for the source of the citation?
- In what format and what size should the logo be for the Relais Header?
- Is there an option for a patron or library to request their login / password, e.g., if it has been forgotten?
- Once the forms are in use, are we able to modify them ourselves or do we submit a Support ticket?
- What are the definitions of the statuses that display on the Request List and Request Details?
- What browsers are supported for the Relais Portal?
- When completing the Request Templates spreadsheets what does 'Required' mean?
- When completing the Request Templates spreadsheets what does 'Show if data' mean?
- With the current web pages, my library handles patron authentication outside Relais, is this approach still available with the Relais Portal?
- With the library’s change password option, will that change the library’s password in our database or will the request go to staff to make the change?