Configure your library system

Find important information about configuring your library's NCIP server to enable NCIP between your library system and Relais.

If you enable NCIP between your library system and Relais, you need to configure your library's NCIP server.

Please contact your library system vendor for instructions on how to configure your NCIP server.

If you use NCIP to update circulation transactions in your library system, any default loan periods used when items are checked out are set based on the values you have defined in your local library system circulation matrix. Circulation matrices are typically based on a combination of patron type, item type and location to determine loan periods.

Note:

To ensure that appropriate loan periods are assigned to the items you lend via ILL, you should create ILL specific item and patron types.

ILL specific patron types would be assigned to the generic patron records you create for lending material to external entities. Ensure that the loan period defined in your local circulation matrix for this patron type is set to reflect your ILL loan policies.

When borrowing materials from other libraries you can ensure that the loan period set is the same across all patron types in your local system by creating an item type to be used when creating the brief item for circulation. This item type is then configured in your local ncip server settings to be the one used when brief items are created via the AcceptItem message.

Generic patron records

Generic patron records will need to be created in your local library system to support the automatic checking out of material that you will lend through ILL via Relais.

Libraries can choose to create generic patron records for specific libraries you wish to track loans against OR default generic patron records to record all loan transactions against. Once these generic patrons records are created locally, they will need to be configured in the ILS Settings section of various ini files in Relais. Please refer to the Circulation Components document for information on where to configure these generic patron records in Relais.

Note:

When creating these generic patron records you may wish to create a specific patron type to associate them with so that you can define ILL specific loan periods in your circulation matrices based on the patron type you add to these generic patrons.

Ensure that the thresholds for the number of items checked out, fines and overdues are set to be higher for these patron
types so that you can easily circulate lots of items to these patrons and avoid having the CheckoutItem message return an error due to a blocked generic patron.