Relais ILL

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 Portal FAQ

- **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

• 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

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

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

• ISO transactions

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

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

Find information on loan items and managing loans in Relais ILL.
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
• **Deliver documents**

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  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**

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  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**

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

  - Configure general messages
  - Send general messages

• **Edit Requests**

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

• **Search catalogues**

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

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

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• 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

Learn about reporting functionality in Relais ILL.
- COPPUL report

Relais supplying

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

Relais 2020.x

Find information, including installation and upgrade instructions, for Relais version 2020.x.
- Relais 2020.x Overview
- Application, service and dll versions
- Install and upgrade FAQ
- Install and upgrade for Relais ILL

Relais 2019.x

Find information, including installation and upgrade instructions, for Relais version 2019.x.
- Relais 2019.x Overview
- Application, service and dll versions
- Install and upgrade FAQ
- Install and upgrade for Relais D2D
- Install and upgrade for Relais ILL

Relais 2016.x

Find information, including installation and upgrade instructions, for Relais version 2016.x.
- Relais 2016.x Overview
- Application, service and dll versions
- Install and upgrade FAQ
- 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.

◦ 2021 Relais ILL release notes
◦ 2020 Relais ILL release notes
◦ Known Issues
◦ Relais Portal updates