Find information about configuring NCIP in Relais ILL, including NCIP server connection information, patron profiling, and circulation components.

There are 3 components to configuring NCIP in Relais ILL:

1. NCIP server connection information: Includes information such as the NCIP server address and port.
2. Patron profiling: If you are using NCIP Lookup User to authenticate or authorize patrons, you can specify more detail such as which patron types are allowed to submit requests.
3. Circulation components: When using NCIP to update circulation transactions, configuration of generic patron ids and pickup locations is needed.

**NCIP Server connection information**

Configure your NCIP server connection information in Relais ILL. Where appropriate, any configuration specific to a particular library system is noted.

1. Login to Library Registration.
2. Retrieve your home library record. See [Retrieve or view a library record](#) for more information.
3. Click Contact.
4. In the lower right hand corner, enter your home library symbol in the NCIP Server Library field to activate the Configure NCIP Server button.

5. Click the Configure NCIP Server button to display the NCIP Server Connection window. Enter the information as defined below.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>CHARACTERS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILS System</td>
<td></td>
<td>Select your library system from the drop down list.</td>
</tr>
<tr>
<td>Version</td>
<td></td>
<td>Select the version of NCIP your library system is running.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ All library systems currently run NCIP V1.0, with the</td>
</tr>
<tr>
<td>FIELD</td>
<td>CHARACTERS</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------------------</td>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>exception of Innovative Interfaces and Alma who run NCIP V2.0</strong></td>
</tr>
<tr>
<td>Connection Type</td>
<td></td>
<td>Select the method by which Relais connects to your NCIP server from the drop down list: tcp/ip, http or https.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Caution:</strong> We strongly recommend that libraries use https as their connection type. Using https ensures that patron data transmitted back and forth between Relais and your library system is done securely. Furthermore, the use of NCIP messaging when processing requests through the Windows client is only supported through the connection types http and https.</td>
</tr>
<tr>
<td>Server Address</td>
<td>80</td>
<td>Enter the IP or base host name for your NCIP server.</td>
</tr>
<tr>
<td>Port</td>
<td>10</td>
<td>Enter the port number through which your NCIP server communicates.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ If you use the Relais Hosted Service, ask your local IT staff to open your NCIP port in your firewall to incoming traffic from the IP address of the Relais web forms. Please contact OCLC Support if you are not sure what the correct IP address is for your Relais web forms.</td>
</tr>
<tr>
<td>NCIP URI</td>
<td>80</td>
<td>Enter any remaining part of the url needed to access your NCIP</td>
</tr>
<tr>
<td>FIELD</td>
<td>CHARACTERS</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Application Profile</td>
<td>20</td>
<td>Required by ExLibris Alma to determine which system is making the message call.</td>
</tr>
<tr>
<td>Server Agency</td>
<td>20</td>
<td>Required by ExLibris Alma in the ToAgencyID field in the xml InitiationHeader. This may be different than Agency ID fields used in the rest of the message.</td>
</tr>
<tr>
<td>Agency Schema</td>
<td>100</td>
<td>Required by TLC. The typical url used by TLC is <a href="http://www.tlcdelivers.com/ncip/schemes/uniqueagencyid.scm">http://www.tlcdelivers.com/ncip/schemes/uniqueagencyid.scm</a> If you are a TLC customer, please confirm this schema with TLC before profiling it in Relais.</td>
</tr>
<tr>
<td>To Agency</td>
<td>20</td>
<td>Enter your library's agency code as the agency to which Relais sends NCIP messages.</td>
</tr>
<tr>
<td>FIELD</td>
<td>CHARACTERS</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>---------------</td>
<td>------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>From Agency</td>
<td>20</td>
<td>Enter Relais as the agency from which NCIP messages are sent.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>◦ Not used for SirsiDynix Symphony.</td>
</tr>
</tbody>
</table>

Active Messages

Check the messages you wish to use

◦ Lookup User
◦ Check Out Item
◦ Check In Item
◦ Accept Item
◦ Request Item (currently available for TLC and Symphony only)
◦ Delete Item - not yet available
◦ Update Item - not yet available

6. Click **OK** to accept the new settings. A pop up screen displays to confirm the settings have been added. Click **OK** to acknowledge the message.

**Patron profiling**

There are three ways to configure Relais to do more detailed validation of your patrons using the **NCIP Lookup User** message and determine whether a patron is allowed to submit requests. These three areas include:

- Patron profiles
- Statuses
- Unit libraries

**Patron Profiles**

Specify which patron or borrower types in your library system are permitted to place loan and/or copy requests in Relais ILL by defining patron profiles. To invoke this functionality, set the **Use Server Profile** button to **Yes** and then define the permissions of each patron or borrower type from your library system via the **Update Profile** button.
1. Access **Library Registration** via **Login – Staff**.

2. Search/retrieve your institution’s library record. Upon retrieving your library’s record, switch to the **Contact** tab.

3. To use patron profiles for validation ensure the **Use Server Profile** button is set to **Yes**.

4. Click **Update Profile** to configure your patron/borrower types and their permissions:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>CHARACTERS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Code</td>
<td>20</td>
<td>Enter the patron type code from your library system.</td>
</tr>
<tr>
<td>Description</td>
<td>50</td>
<td>Enter in a description of the patron type code.</td>
</tr>
<tr>
<td>Patron Type</td>
<td></td>
<td>Select the patron type code created in Relais from the drop down list that you would like to associate your library system patron code with.</td>
</tr>
</tbody>
</table>

   - You can associate multiple NCIP profiles with one single patron type code in Relais.
     - For example, if you have several different Undergraduate patron types/profiles in your library system, you could create one patron type in Relais called Undergraduate and associate each of your library system profiles with that one patron type. This is helpful for sites that have extensive patron types in their library system and need to map them to a finite
<table>
<thead>
<tr>
<th>FIELD</th>
<th>CHARACTERS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan Code</td>
<td></td>
<td>Select the loan code to be associated with the patron profile.</td>
</tr>
<tr>
<td>File Format</td>
<td></td>
<td>Select the default file format that material is delivered in when sent via email.</td>
</tr>
<tr>
<td>Message Format</td>
<td></td>
<td>Select the default message format.</td>
</tr>
<tr>
<td>Billing Type</td>
<td></td>
<td>Select the billing type to be associated with the patron profile.</td>
</tr>
<tr>
<td>Billing Rate</td>
<td></td>
<td>Select the billing rate to be associated with the patron profile.</td>
</tr>
<tr>
<td>Copy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allow Copy</td>
<td></td>
<td>Select whether this patron profile is allowed to place copy requests</td>
</tr>
<tr>
<td>Delivery Select</td>
<td></td>
<td>Select whether the patron is allowed to select their delivery type when placing copy requests.</td>
</tr>
<tr>
<td>Delivery Method</td>
<td></td>
<td>Select the default delivery method for copy requests for this patron profile.</td>
</tr>
<tr>
<td>Delivery Address</td>
<td>80</td>
<td>Enter the default delivery address for copy requests for this patron profile.</td>
</tr>
<tr>
<td>Loan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allow Loan</td>
<td></td>
<td>Select whether this patron profile is allowed to place loan requests.</td>
</tr>
<tr>
<td>Delivery Select</td>
<td></td>
<td>Select whether the patron is allowed to select their delivery type when placing loan requests.</td>
</tr>
<tr>
<td>Delivery Method</td>
<td></td>
<td>Select the default delivery method for loan requests for this patron profile.</td>
</tr>
</tbody>
</table>

Printed: Fri, 02 Sep 2022 15:30:32 GMT
**Delivery Address**

Enter the default delivery address for loan requests for this patron profile.

Note: If you chose a default delivery method of *Pickup* and wish to define a default delivery address, ensure that you have configured your pickup locations via *Table Maintenance* and ensure that these are associated with the correct pickup location code in your library system. It is this code that is sent in the *AcceptItem Message* when processing an LON request. See *Circulation components* for information on configuring pickup locations via *Table Maintenance*.

5. Click **Add** to add the patron profile to your system.

**Patron statuses**

Various statuses can be returned as part of the NCIP Lookup User response. These statuses indicate whether a patron’s borrowing privilege in your library system is *Delinquent*, *Blocked*, *Barred* or *Expired*. Define these status codes in Relais and then indicate for a given code whether patrons would be permitted to place a request if their patron record returned that status.

1. Access *Library Registration* via *Login – Staff*.
2. Search/retrieve your institution's library record. Upon retrieving your library's record, switch to the *Contact* tab.
3. To define patron statuses for validation select **Status Codes**.

Enter in the status code returned in the LookupUser response from your library system. The typical values returned are OK, DELINQUENT, BLOCKED, BARRED, and EXPIRED. Please check with your library system vendor to see if there are other.
<table>
<thead>
<tr>
<th>FIELD</th>
<th>CHARACTERS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific status codes</td>
<td>specific status codes that are returned in their LookupUser response that you can configure.</td>
<td></td>
</tr>
<tr>
<td>Allow ILL</td>
<td></td>
<td>Select whether a patron would be permitted to place a request if their record is returned with the configured status.</td>
</tr>
</tbody>
</table>

4. Click **Add** to add the patron profile to your system.

### Unit libraries

Some library system vendors return a patron's unit library (the library to which they are registered in your library system) in the **NCIP LookupUser** response. If this is the case, these library codes will need to be defined as part of your NCIP configuration in Relais. Check with your library system vendor to see if they return a unit library in their LookupUser response. Click the **Unit Libraries** button to invoke the **NCIP Unit Library Mapping** window.

1. Access **Library Registration** via **Login – Staff**.
2. Search/retrieve your institution's library record. Upon retrieving your library’s record, switch to the **Contact** tab.
3. To define patron statuses for validation select **Unit Libraries**.

![Unit Libraries window](https://help.oclc.org/Resource_Sharing/Relais_ILL/NCIP/Configuring_NCIP_in_Relais_ILL)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>CHARACTERS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCIP Library</td>
<td>25</td>
<td>Enter the code of the unit library in your library system that is sent back in the LookupUser response.</td>
</tr>
<tr>
<td>Relais Library</td>
<td></td>
<td>Enter in your library symbol in Relais to associate the NCIP library to your library in Relais.</td>
</tr>
</tbody>
</table>

4. Click **Add** to add the unit library to your configuration.
Test the Lookup User message

Once you have configured your NCIP settings in Relais and ensured that the relevant configuration required on your library system side has been completed for your NCIP server and any required ports are open, you can test to see if Relais is communicating with your NCIP server by using your patron web pages to log and invoke the LookupUser message.

The patron is required to enter a barcode/ID and pin/password/lastname to validate themselves at the login screen of your patron web access pages.

The barcode/ID is typically the active unique ID associated with the patron record in your library system. The password/pin/lastname is often labeled as such.

Please check with your library system vendor to confirm which fields your patrons should be using to enter their barcode/ID and password/pin/lastname from.

If you are able to successfully log in through the patron access pages and place a request, your NCIP connection is active and working as expected. It is also good to test logging in with patrons who are either blocked or expired as well as those that have patron types that are not allowed to place any or certain types of requests to ensure that the NCIP elements you have configured for patron profiles or status codes are working as expected.

Circulation components

If you plan to use the Checkout and AcceptItem NCIP messages in Relais, generic patron records and pickup location must be configured.

Generic patron records

Generic patron records are the patron records in your local library system to which material loaned to other libraries is checked out. Once these generic patron records are created in your library system, update the ilsSettings.ini and/or the ILS Settings section of the Relais.ini as described below. For customers using the Relais Hosted Service, contact OCLC Support with this information.

The ilsSettings.ini is called upon updating requests via the staff web and is on the web server which serves up your Relais web pages.

The ILS Settings section in the Relais.ini is used when updating request via the windows Login.

The basic configuration for generic patrons is identical for both the ilsSettings.ini and the ILS Settings section of the Relais.ini

Loans to default generic patrons

The typical configuration (for NCIP) for loaning items to other libraries is to use generic patron IDs. Use the ILL_Patron_# fields to record the barcodes for each of the generic patron record(s) created in your local system.
Example:

[ILS SETTINGS - YOURLIBRARYSYMBOL]
USEGENERICPATRONID=N
ILL_PATRON_1=20190000000001
ILL_PATRON_2=20190000000002

It is possible to configure multiple generic patron barcodes. Relais will send the first patron barcode in this section in the CheckoutItem message. If a problem is encountered with this patron during the checkout (i.e. the patron record is blocked or expired), Relais will automatically send the next barcode in the list until the material is successfully loaned in your local system.

**Loans to institution specific patrons**

Use the LibrarySymbol_Patron_# fields to record the barcode for any institution specific patron record(s) created in your local system. This allows libraries to track the material they lend to a specific library.

Example:

[ILS SETTINGS - YOURLIBRARYSYMBOL]
USEGENERICPATRONID=N
BVAU_PATRON1=20190000000003
OKO_PATRON1=20190000000004
ILL_PATRON_1=20190000000001
ILL_PATRON_2=20190000000002

When a request for a given library is updated as a loan, Relais will send this library's barcode in the CheckoutItem message. Note there are also a couple of generic IDs. These would be used if there is no entry for the library to which the item is to be loaned.

Note: For Relais Hosted Service customers who use the staff web client to process requests, contact [OCLC Support](https://help.oclc.org/Resource_Sharing/Relais_ILL/NCIP/Configuring_NCIP_in_Relais_ILL) to update these settings. Please provide the appropriate generic patrons IDs as described above.

**Pickup Locations**

If you allow patrons to use the delivery method of **Pickup** for material they are requesting through ILL, you will need to ensure that you have your correct library system pickup location codes associated with the pickup locations used by patrons in Relais when they place requests in your system. The AcceptItem NCIP message creates a brief bib and item and places a hold on the brief bib for pickup in your library system when processing a LON request.

1. Access **Table Maintenance > Delivery/Messaging > Pickup Location**
2. Add or modify existing pickup location codes in your Relais system to associate with your library system pickup locations.

<table>
<thead>
<tr>
<th>Field</th>
<th>Characters</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>1</td>
<td>The pickup location code in Relais is a one character code. You can use A-Z, 0-9, as well as the ~, !, @&lt; #, $, %&lt; ^, &amp;, *, (, ), _, -, +, =, {} etc. characters to define these pickup locations. Enter in a single character code.</td>
</tr>
<tr>
<td>Library Symbol</td>
<td></td>
<td>Enter in your institution's library symbol.</td>
</tr>
<tr>
<td>ILS Code</td>
<td>20</td>
<td>Enter in the pickup location code from your library system that represents the pickup location you are creating/modifying in Relais.</td>
</tr>
<tr>
<td>Description</td>
<td>50</td>
<td>Enter in a description of the pickup location. This description will display in the Delivery Location drop down list when placing requests in the system and displays in alphabetical order by description.</td>
</tr>
</tbody>
</table>

Note: If you wish a commonly used pickup location to move to the top of the display list, enter an * or character at the front of the description to move it to the top of the list.