Each staff member that uses Relais ILL to add, update, query and process requests can be assigned his or her own login id and password.

<table>
<thead>
<tr>
<th>Date/Time Stamp</th>
<th>Location</th>
<th>Function</th>
<th>User ID</th>
<th>Code</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 08, 13 10:33</td>
<td>Search Manual</td>
<td>Processed</td>
<td>CLARE</td>
<td></td>
<td>Search Complete</td>
</tr>
<tr>
<td>Jan 08, 13 09:35</td>
<td>Search Auto</td>
<td>Processed</td>
<td>SYSTEM</td>
<td></td>
<td>Moved to Search Manual - Status: Full Search</td>
</tr>
<tr>
<td>Jan 06, 13 20:04</td>
<td>Add Web Request</td>
<td>Processed</td>
<td>WWW</td>
<td></td>
<td>Received: Web ILL - Request from: VMOU1</td>
</tr>
</tbody>
</table>

In addition to individual staff logins, there are several system related logins used by the automated applications and web forms/services, SYSTEM and WWW respectively. By default three additional logins are created at the time of implementation: ADMIN, STAFF and SCANNER.

Add a staff login

When a login is needed for a new staff member:

1. Login to User Maintenance.
2. Click the **Access User** tab.
3. Enter the following information and click **Add**. (Fields marked in bold are mandatory - all other are optional).
## Field | Characters | Description
---|---|---
Surname | | Enter the staff member's surname.
First Name | | Enter the staff member's first name.
Language | Select the staff member's preferred language. Default = English
Group | Select the group to which the staff member belongs.
Library Symbol | Enter the home library symbol with which the staff member is affiliated.

Caution: This is critical for shared systems since this library symbol determines which requests the staff member is able to access and update - when used with the Access all Requests setting. For example, a staff login with library symbol is only able to access patron requests that
**FIELD** | **CHARACTERS** | **DESCRIPTION**
--- | --- | ---
are linked with the same library symbol.

**Login ID** |  | Enter the staff member's login. The login is case sensitive.

**Password** |  | Enter the staff member's password. The password is case sensitive.

**Confirm Password** |  | Re-enter the staff member's password.

**Access all Requests** |  | In a shared system, specify whether the staff member is allowed to access all requests.

Yes = The user is able to retrieve all requests when using Query.

No = The user can only retrieve requests from their own patrons and for which their library is the current supplier.

The default is set in the corresponding Access Group. The default is Yes.

**Info 1** |  | Enter any other miscellaneous information for the staff member.

**Info 2** |  | Enter any other miscellaneous information for the staff member.

**Info 3** |  | Enter any other miscellaneous information for the staff member.

**Limit staff functionality**

The group to which a staff member belongs determines the functions which they can access.

To remove specific functionality, e.g., Patron Registration, so that staff cannot access it.

1. Login to User Maintenance.
2. Click the **Access Functions** tab.
3. Highlight the row which corresponds to the staff member's group and the function to be removed, e.g., LEN (Lending Staff) & Patron Registration.

4. Click **Delete** and click **Yes** to confirm.

The next time a staff member that belongs to this group logs in and clicks Patron Registration, the following message displays:

![Message dialog](image)

It is also possible to modify the options that display on the Relais Login, e.g., to remove functions which staff cannot access.

**Configure Add Document for Windows Login**

1. Login to Administer Settings.
2. Select the **Application Settings** tab.
3. Select Processing, Login, ADMINISTRATION.
4. Click on Edit Extended Settings tab.
5. Select Query Request tab.

At the Extended Query Requests Settings window make the following updates:

1. Set "Starting folder for Add Document" to the location of your stored images.
2. Set "File Storage Root for Add Document" to the location of the scanner folder in your Relais Root directory.
3. Set "Use Transfer Service" to Yes.
4. Select the Update tab.

Repeat for each instance of login you want to configure.

The value for "Starting folder for Add Document" should be the folder where you store images like pdf files. For example, you might store the files in a directory called: z:\images

Note that Relais does not automatically clear this directory after requests have been processed. But you can choose to delete them manually if you decide you no longer need them. Deleting files from this directory has no effect on the
requests once they are processed.

# Configure Add Document for Staff web

If you are using Add Document from Staff Web, certain lines in the relaisWeb.ini file on the ftp server must be present. The sections in the ini file to edit are FILE TRANSFER (these lines define where and how files are to be transferred) and ALLOW FILE TYPES (these lines define the kind of files which can be transferred).

Use the following example as a guide:

<table>
<thead>
<tr>
<th>LINE</th>
<th>DESCRIPTION</th>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>FTPServerAdress</td>
<td>The IP address for the machine where files are to be uploaded.</td>
<td>FTPServerAddress=192.168.x.y</td>
</tr>
<tr>
<td>FTPUserName</td>
<td>The username for the machine where files are to be uploaded.</td>
<td>FTPUserName=admin</td>
</tr>
<tr>
<td>FTPUserPassword</td>
<td>The password for the machine where files are to be uploaded.</td>
<td>FTPUserPassword=password</td>
</tr>
<tr>
<td>FTPMode</td>
<td>Determines how the data connection is established. Can be set to either Active (A) or Passive (P).</td>
<td>FTPMode=A</td>
</tr>
<tr>
<td>TempDirectory</td>
<td>The temporary location where a file is stored before it is transferred onto the FTP server.</td>
<td>TempDirectory=/usr/tomcat/webapps/access/WEB-INF/temp/</td>
</tr>
<tr>
<td>DestinationFolder</td>
<td>The final location where a file is stored once it has been transferred onto the FTP server.</td>
<td>DestinationFolder=/images</td>
</tr>
<tr>
<td>ScannerFolder</td>
<td>The path where the file is stored.</td>
<td>ScannerFolder=R:\Relais\scanner</td>
</tr>
</tbody>
</table>

## ALLOW FILE TYPES

Each line in this section contains types of files allowed in order to upload them to the ftp server or write them to a Destination Folder. In particular, these settings contain file extensions. For example,

File Type 1 = pdf

File Type 2 = tiff

File Type 3 = doc

**Note:** If this section is not configured then default file types are pdf, tif, jpg, bmp.