Learn how to configure document delivery using Post to Web in Relais ILL.

Overview

- Requests with a delivery method of post-to-web, are processed through Delivery Email.
- For requests in this queue, Delivery Email sends an email to the requester with one or more links to the requested document.
- Multiple options are available when setting up Post to Web delivery including:
  - How many days the document is available to the requester.
  - How many times the document can be viewed by the requester.
  - Whether the cover page is included, if yes whether to include it as an attachment to the email (recommended) or merge it with the document.
- Introduced in Relais 2014, is the option to require the patron to Login prior to accessing a Post to Web document and to accept a Terms of Use statement. Note, when configured this option is not used when delivering documents via Post to Web to other libraries.

Configure delivery email - Post to Web

For customers using the Relais Hosted Service contact OCLC Support and provide the following information:

- Specify the number of days the document is accessible to the requester. Once this number of days has passed Purge FTP deletes the document from the server automatically and the requester no longer has access. The number of days can be included in the email message sent to the requester.
- Specify the number of times the requester can access the document. The number of views allowed can be included in the email message sent to the requester.
- Specify whether to include a coverpage, if yes specify whether to merge the coverpage with the document. Caution: It is recommended that the coverpage NOT be merged with the document. When the option to merge is turned on errors and problems are frequently encountered when attempting to deliver electronic documents that incorporate security. In these cases it is often not possible to merge the coverpage with the document. By default the Merge Coverpage option is set to No.
- Use Batch Processing (yes or no) - default is Yes
  - Set to Yes, Delivery Email sorts all Post to Web requests in the queue by email address and then sends only one e-mail with multiple links.
  - Set to No, sends each document link in a separate e-mail message.
- Specify the following for situations when the requester cannot access the Post to Web document, e.g., if the number of days has passed.
  - A redirect url and the text to display
  - An email address and the text to display (optional)
Configure the email template used to generate the Post to Web message

1. Login to Library Registration.
2. Retrieve your home library record.
3. Click Message Format.
4. Click Set System Default.
Note: It is possible to specify email template for a specific patron or library. If no specific template has been configured, then the System Default template is used.

5. Enter the following and click Ok.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>CHARACTERS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skip Head and Footer Files</td>
<td></td>
<td>Select Yes or No. If Yes then text files found in the Relais root directory are used to as the header and footer for the email template. If No then these text files are ignored.</td>
</tr>
<tr>
<td>Subject</td>
<td>100</td>
<td>Enter the Subject for the email. For example:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Electronic delivery for Request Number(s): &amp;RequestNumber;</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>The token &amp;RequestNumber can be used. When the email is generated the token is replaced with the Relais Request Number. If Batch Processing is set to Yes and multiple documents/links are included in the email then the token is replaced with all relevant Relais Request Numbers.</td>
</tr>
<tr>
<td>Request Info</td>
<td>500</td>
<td>Enter the text and tokens to be used in generating the request specific section of the email template. For example:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This message contains a link to the document you requested: &amp;Title;, &amp;ArticleAuthor;. &amp;ArticleTitle;.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The document contains &amp;DocumentPages; page(s), is &amp;DocumentSize;, was posted on &amp;DatePosted;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>at &amp;TimePosted12; and is available for download for &amp;DaysAvailable; days and can be accessed one (1) time.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>&amp;DocumentLink;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The coverpage for this document is attached to this email.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This section is incorporated into the body of the message.</td>
</tr>
<tr>
<td>Body</td>
<td>3000</td>
<td>Enter the text and tokens to be used in generating the body of the message. Typically the Request Info as described above in included as a token in the Body. For example:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Hello &amp;RequestInfo;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the link to open the</td>
</tr>
</tbody>
</table>
document does not work from your mail program, please copy this URL into your Web browser:

Contacts:
If you have any difficulties please either contact the ILL Office at yourlibrary_ill@emailprovider.com

Note: HTML encoding can be used in the email template.

Require Login to access the document and to accept Terms of Use Configure Login and a Terms of Use statement

When this option is configured,

• When the patron receives the Post to Web email

  This message contains a link to the document you requested for Request Number: TS1-10000285.

  The document contains 3 page(s), is 531 KB, was posted on November 29, 2014 at 07:59:03 AM and is available for download for 21 days and can be accessed one (1) time.

  Click [here](https://help.oclc.org/Resource_Sharing/Relais_ILL/Deliver_documents/Post_to_Web) to access the document. You will be asked to Login and accept Terms of Use prior to the document being displayed.

  If the link to obtain the document does not work from your mail program, please copy this URL into your Web browser: test1.relais-intl.com/user/login.html?group=patron&LS=LIBRARY1&reqno=TS1-10000285

  Contacts:
  If you have any difficulties please either contact ILL staff at info@relais-intl.com and quote the Request Number.

• Then the patron clicks the link in the message:
• The Login page appears

![Login Page](https://help.oclc.org/Resource_Sharing/Relais_ILL/Deliver_documents/Post_to_Web)
• The patron logs in and My Requests displays the request details for the Request number specified in the link.

<table>
<thead>
<tr>
<th>Request Number</th>
<th>Title</th>
<th>Author</th>
<th>Submitted On</th>
<th>Need Before</th>
<th>Due Date</th>
<th>Article Link</th>
<th>Status Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>TS1-10000285</td>
<td>JOURNAL OF TESTING</td>
<td>JACK SMITH</td>
<td>Nov 29, 2014 08:57 AM</td>
<td></td>
<td></td>
<td>download</td>
<td>Nov 29, 2014 08:59 AM</td>
<td>Article Sent</td>
</tr>
</tbody>
</table>

Title / Title of Article: JOURNAL OF TESTING / HOW TO ......
Author / Author of Article: / JACK SMITH
ISBN / ISSN: / Date: 2011
Publisher: 
Edition: 
Volume/Issue/Pages: 3/ 3 / 61-682011
Article Link: download
Submitted On: Nov 29, 2014 08:57 AM
Need Before:
Due Date:
Status: Article Sent

History

• The patron clicks download under the Article Link and the Terms of Use statement displays in a pop-up box with the choices – I agree or Cancel.

• The patron clicks I agree and the document displays in a new tab.

Configure Login and Terms of Use statement

Note: For customers using the Relais Hosted Service contact OCLC Support and provide the following information:

- Require patrons to Login = Yes
- The text for the Terms of Use statement.

If not using the Relais Hosted Service
Step 1

- Login to Administer Settings.
- Select the **Application Settings** tab.
- Open the Delivery section, select **Delivery Email**.
- Click on **Edit Extended Settings**.
- In the Post to Web section enter the Download Login address. For example:


  When Delivery Email creates the email to send to the patron, this link is used. The RequestNumber token is replaced with the actual request number.

Step 2

In the relaisweb.ini

- Add a new setting to the [Request Status Table Settings] section, TermsOfUseEnabled and set to Y(es)

Step 3

In the translation file for the Relais web forms, modify the text for the Terms of Use Statement.

**Require Login to access the document but do not display Terms of Use**

When this is configured, once the requester receives the Post to Web email and clicks on the link in the email message.

- The Relais Login page appears
- The patron logs in using the login and password
- My Requests displays the request details for the Request Number specified in the link
- The requester clicks on download under Article Link
- The document displays

**Configure Login only**

Note: For customers using the Relais Hosted Service contact [OCLC Support](https://help.oclc.org/Resource_Sharing/Relais_ILL/Deliver_documents/Post_to_Web) and provide the following information:

- Require patrons to Login = Yes

If not using the Relais Hosted Service
Step 1

• Login to Administer Settings.
• Select the **Application Settings** tab.
• Open the Delivery section, select **Delivery Email**.
• Click on **Edit Extended Settings**.
• In the Post to Web section enter the Download Login address. For example:

  ```
  https://your_library_symbol.relais-host.com/user/login.html?LS=\&LibrarySymbol;\&group=\&PortalGroup;\&reqno=\&RequestNumber;
  ```

  When Delivery Email creates the email to send to the patron, this link is used. The RequestNumber token is replaced with the actual request number.