Fulfillment options

Find information about the fulfillment options in Relais D2D. The Requestability logic determines for a particular item which fulfillment option to display:

- whether or not the patron can request it from within the consortium, or
- whether the item is available locally (and so cannot be requested), or
- whether the patron must request it via traditional ILL.

Requestability uses parameters derived from each bibliographic record retrieved along with the patron type to determine which fulfillment option to display.

The configuration for requestability is specific to each catalog configured in the Relais D2D system.

Patron type

The Requestability logic determines whether the patron can use the service based on their patron type. The patron type is included in the NCIP Lookup User response in the 'patron profile'. If NCIP is not used then the patron type from the Relais patron record is retrieved.

If the patron type matches one of the values configured for Not Allowed Patron Type then a message is displayed to the patron advising that they are not allowed to use the service.

The text for this message is configurable by each library. By default this message is:

You are not allowed to request via this service. Please contact ILL staff.

For example, if the patron profile returned in the Lookup User response is 'alumni' and this value is configured for the patron's home catalog, then the message is displayed and the patron is not allowed to proceed.

Configuring patron type

1. To change the patron types for which the patron is NOT allowed to use the service, contact your Relais D2D Administrator and provide the appropriate values.
2. To change the text of the message to display when a patron with a Not Allowed Patron Type tries to use the service, contact your Relais D2D Administrator and provide the text of the message and any contact information, e.g. an email address.

Requestability parameters

For each of the parameters from each bibliographic record, appropriate logic is used to determine a true or false value.
used in building a requestability evaluation matrix.

**Format**

Is the format considered requestable?

The format provided in the bibliographic record is compared with the format configured for each catalog.

- If a match is found then the cell value is true.
- If no match is found then the cell value is false.
- Each library may configure the appropriate evaluation for records for which do not specify a format, i.e., are these items considered requestable or not requestable

**Example 1:** If the format specified in the record retrieved from the Brown catalog is 'book', and 'book' is configured as a value in Brown's configuration, then the value for the Format cell for this record is set to true.

**Example 2:** If the format specified in the record retrieved from the MIT catalog is 'ebook', and 'ebook' is not configured as a value in MIT's configuration, the value for the Format cell for this record is set to false.

**Configuring Format**

1. To change the formats that are considered requestable, contact your Relais D2D Administrator and provide a list of formats to be added, deleted or changed.
   - This is a list of formats configured in the Requestability logic. These are derived from a variety of data elements within the MARC 001, 007, 008 tags.

**Shelving Location**

Is an item with this shelving location considered requestable?

For the shelving location returned in each record, for example, ILR Library (Ives Hall), Library Annex and Perkins/Bostock Library Stacks:

- If there is an active supplier and library record corresponding to this shelving location in the Relais database then the cell value is true.
- If there is no active supplier or library record in the Relais database then the cell value is false.
- Each library may configure the appropriate evaluation for records for which no shelving location is specified, i.e., are these items considered requestable or not requestable

**Configuring Shelving Location**

1. To change the shelving locations that are considered requestable, contact your Relais D2D Administrator and provide a list of shelving locations to be added, deleted or changed.
   - This is a summary of from where the shelving location is derived from each library system.
Call Number

Is the call number or the start of the call number considered NOT requestable?

The call number returned in each record is compared with the call numbers configured for each catalog.

• If the call number starts with any of the configured values then the cell value is false.
• Otherwise the cell value is false.
• Each library may configure the appropriate evaluation for records which do not include a call number, i.e., are these items considered requestable or not requestable

For example, the configuration for this parameter may include values such as: Dis, Micro, Folio. Any records for which the call number starts with any of these configured values is considered not requestable.

Configuring Call Number

1. To change the call numbers or the start of call numbers that are considered NOT requestable, contact your Relais D2D Administrator and provide a list to be added, deleted or changed.

Availability

Is the item on loan?

If the item is on loan, then the cell value is false. If the item is not on loan the cell value is true.

Loan Policy

Does the loan policy provided allow the item to be requested?

The loan policy returned in the record is compared with the loan policies configured for each catalog, for example: Regular loan:01, Regular loan (depository):01, 28-day loan:28, 28-day loan (depository):28

• If a match is found or if no loan policy is provided then the cell value is true.
• If no match is found then the cell value is true.
• Each library may configure the appropriate evaluation for records which do not include a loan policy, i.e., are these items considered requestable or not requestable

Configuring Loan Policy

1. To change the loan policies that are considered requestable, contact your Relais D2D Administrator and provide a list of loan policies to be added, deleted or changed.

   ◦ This is a summary of from where the loan policy is derived from each library system.

Local requestability and secondary suppliers
Held Locally

Is the item held in the patron's library?

If a record is returned from a catalog which matches the patron's 'home' library then the item is held locally and so the cell value is true. If the item is not held in the patron's home library then the cell value is false.

Local Requestability

if the item is held locally but is not requestable (as determined above) are there situations where a library may still want to push the patron to the record in the local catalog rather than submit a request, for example if the item is on loan?

The value for Availability for this record is matched with values configured for Local Override, for example: In Transit, Shelving Cart, On order

- If the value for the Availability parameter starts with any of the configured values then the cell value is true.
- If the value does not exist or does not start with any of the configured values then the cell value is false.
- Note that if the item is held locally and is requestable (as determined above) then the cell value is true

Secondary Supplier

Is the item held at a Secondary Supplier, e.g., CRL?

A Secondary Supplier is not considered part of the consortium but the catalog of this supplier is included in Discovery. For example some libraries in a consortium may include CRL (Center for Research Libraries) as one of their targets. This allows the patron to direct a request to the local ILL system if found in this catalog.

- If the item is held in a catalog which is configured as a Secondary Supplier, then the cell value is true.
- Otherwise the cell value is false.

Quota for a specific location or locations

Is there a quota for the number of requests that can sent by all members of the consortium to the specific shelving location(s) configured?

- One or more specific shelving locations can be configured as well as the maximum number of requests that can be sent for items in those locations.
- If the quota is exceeded then the cell value is false
- If the quota is not exceeded then the cell value is true

Note: Each time a request is sent to one of these locations, a count is updated by Increment Request.

The count of requests sent to these shelving locations is reset each day by the Relais Process service.
Configuring a quota for a specific location or locations

1. To specify for which shelving location or locations you wish to impose a limit on the number of requests per day received from all consortium members, contact your local Relais D2D Administrator and provide a list of locations as well as the total number of requests to be received per day.

The results of the Requestability evaluation matrix are used to determine what option, i.e., message and link, to display to the patron. See Requestability options for patrons.