Learn about the available request templates and how to configure them in the Relais Portal. Five templates are available for adding requests to Relais: Article, Book, Book Chapter, Conference and Thesis. A generic Add Request template also exists and additional templates can be configured.

By default two of these options display in the side menu: Article and Book. Additional request templates can be added to the side menu.

A default set of fields is displayed for each request templates. The fields displayed and hidden can be configured.

Title is the only mandatory field configured by default for each request template. Additional mandatory fields can be configured.

Once the patron or library has entered the request information and submitted the request, the Add Request web service adds the request to the Relais database.

**Request templates**

Each template displays different bibliographic fields by default along with the appropriate labels for each of these fields. When a request is received via OpenURL that includes a genre type that has not been configured in the Relais Portal, then a generic template displays. The generic template displays all the possible bibliographic information fields. Five request templates are available: Article, Book, Book Chapter, Conference and Thesis.

<table>
<thead>
<tr>
<th>TEMPLATE</th>
<th>DEFAULT BIBLIOGRAPHIC INFORMATION</th>
<th>EXAMPLE</th>
</tr>
</thead>
</table>
| Article    | • Journal Title:  
              • Article Title:  
              • Article Author:  
              • Volume:  
              • Pages:  
              • Issue:  
              • ISSN 1:  
              • ISSN 2: |         |
<table>
<thead>
<tr>
<th>TEMPLATE</th>
<th>DEFAULT BIBLIOGRAPHIC INFORMATION</th>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Book Title:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Author/Editor:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Series Title:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• ISBN 1:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• ISBN 2:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Edition:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Publication Date:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Publisher:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Place of Publication:</td>
<td></td>
</tr>
</tbody>
</table>

**Additional request templates**

<table>
<thead>
<tr>
<th>TEMPLATE</th>
<th>DEFAULT BIBLIOGRAPHIC INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book Chapter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Book Title:</td>
</tr>
<tr>
<td></td>
<td>• Author/Editor:</td>
</tr>
<tr>
<td></td>
<td>• Title of Chapter:</td>
</tr>
<tr>
<td></td>
<td>• Author of Chapter:</td>
</tr>
<tr>
<td></td>
<td>• Series Title:</td>
</tr>
<tr>
<td></td>
<td>• Pages:</td>
</tr>
<tr>
<td></td>
<td>• ISBN 1:</td>
</tr>
<tr>
<td></td>
<td>• ISBN 2:</td>
</tr>
<tr>
<td></td>
<td>• Edition:</td>
</tr>
<tr>
<td></td>
<td>• Publication Date:</td>
</tr>
<tr>
<td></td>
<td>• Publisher:</td>
</tr>
<tr>
<td></td>
<td>• Place of Publication:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Conference</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Conference Title:</td>
</tr>
<tr>
<td></td>
<td>• Author/Editor:</td>
</tr>
</tbody>
</table>
Other request information

In addition to the bibliographic information displayed on the request pages other request information is included such as service type, need by date, publication type.

Other request info for use in all templates

- National Bib Num.:
- System Number:
- Call Number:
- Additional Numbers:
- Source of Information:
- Suppliers:
- Local Location:
- Bibliographic ID:
- Accession #:
- Physical Description:
- Item/Folder Number:
- Series/Box Number:
- Image Number:
- Notes:
- Publication Type:
- Date Submitted:
- Service Level:
- Need by Date:
- Request Source:
- Expiry Date:
- External Number:
- Maximum Cost: can enter numbers with two decimal places
- Project Code:
- OCLC Number:
- Requester Info.:
- Decline Number:
- Service Type:
Requester, delivery and messaging info

Information about the requester and preferred delivery and messaging methods and addresses may also display

Requester, delivery and messaging information for use in all templates

- Contact Phone:
- Delivery Method:
  - If the Delivery Method is hidden then when the request is added to the database the delivery method for the request is set based on the values configured in Relais - NCIP Profile (note this is true even if you do NOT use NCIP to look up patron information.
- Messaging Method:
- Delivery Address:
- Messaging Address:
- Pickup Location:
- First Name:
- Surname:
- Department:
- Institution:
- Street:
- City:
- Country:
- State/Province:
- Zip/Postal Code

Acknowledgement/check box

One or more statements can be configured, which must be accepted by the requester prior to activating the Submit button.

By default the following statement displays: "Please acknowledge that you accept the institution's condition for placing requests."

Configure request templates

Configure which request templates to use as well as the information that displays for each of the request templates. This includes the fields that display, the label for the field and an indication as to whether the field is mandatory. Different configurations can be set up for requests from patrons and for requests from libraries.

1. To add a new request template or templates contact OCLC Support and supply the following information:
   - Do you want to use one of the existing templates? Y/N
     - If yes, which template do you want to add? Book Chapter / Conference Thesis
If no, please provide the following details:

- Name for the template
- Which bibliographic info to include
- Which other request info to include
- Which requester, delivery and messaging info to include
- The text for the acknowledgement statement(s)
- Indicate which fields are mandatory

Be sure to indicate whether the template is for use by patrons, libraries or both and any differences needed.

1. To make a change or changes to an existing request template contact OCLC Support and supply the following information:

- Indicate which template you want to change
- Indicate which fields you want to display
- Indicate which fields you want to hide
- Indicate any changes to the label names
- Remember to specify whether the changes are for the templates used by patrons or by libraries or both.

**Duplicate checking**

If you have turned on duplicate checking, the database logic will check to determine if the request is a duplicate. It is possible to limit duplicate checking to requests from patrons or requests from other libraries or both. By default duplicate checking is NOT turned on.

The following fields are used to determine whether a request is a duplicate:

- Title (of publication)
- Author (of publication)
- Article author
- Article title
- Volume
- Edition
- ISSNs
- ISBNs
- Issue
- Pages requested
- Call number
- Date entered (In your configuration you can specify how many days back the checking should be done. For example if set to '2', when the check is done the requests submitted by the patron in the previous 2 days will be checked.)

If a match is found then the request is considered a duplicate. Matching is done field by field and is case sensitive.
Example 1: A request is submitted with the following bibliographic information: Title = Snow, Ice, and Savannah, Author = Stephen Nicolosi, ISBN = 9781493531950 and a request (from the same patron) already exists in the database with the same three fields and the remaining fields from above are blank then the request is considered a duplicate.

Example 2: A request is submitted with the following bibliographic information: Title = Canadian Journal of Chemistry, Article author = John Smith, Article Title = Chemistry in Canada in 2015 and a request (from the same library) already exists in the database with the same bibliographic details as well as ISSN = 0008-4042 then the request is NOT considered a duplicate.

If a request is identified as a duplicate, determine next actions:

1. Do not add the request to the database and display a message to the requester. The default message is: This is a duplicate request. Duplicate requests cannot be submitted.

   OR

2. Add the request to the database with request status as Duplicate and exception code = DUP (Duplicate). These requests can then be checked by staff in the Review Queue - Duplicate Requests.

Configure duplicate checking

If you are interested in turning on duplicate checking for requests received via the Relais Portal > Add Requests pages please contact OCLC Support and supply the following information.

1. Do you want to turn on duplicate checking for:
   - Patrons
   - Libraries
   - Patrons and libraries?

2. For how many days back do you want to check for duplicates (default number of days = 1)?

3. When a request is identified as a duplicate specify your preference for handling these requests:
   - Display an error message to the requester (no request is added to the database)
     - Specify the message to display. The default message is: This is a duplicate request. Duplicate requests cannot be submitted.
   - Add a request to the database and allow staff to check it in Review Queue - Duplicate Requests.

Need by Date

In the Need by Date calendar it is possible to specify the minimum value that can be selected by the requester. To do this, configure an offset number of days. The number of days is added to the current date and the result is used to indicate the earliest need by date.

By default no offset days are configured.

Note: Weekends (i.e., Saturdays and Sundays) are not included in calculating the earliest possible need by date.
Configure need by date offset days

If you are interested in configuring an offset number of days for the Need by Date please contact OCLC Support and supply the following information.

<table>
<thead>
<tr>
<th>Number of days</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Requests from patrons - copies</td>
</tr>
<tr>
<td>b. Requests from patrons - loans</td>
</tr>
<tr>
<td>c. Requests from libraries - copies</td>
</tr>
<tr>
<td>d. Requests from patrons - loans</td>
</tr>
</tbody>
</table>

Confirmation email

At the time a request is submitted via the Relais Portal > Add Request page, a confirmation email is sent to the requester. The default message is as follows:

From: donotreply@relais-host.com

Subject: Your ILL Request: RequestNumber

Body of the message

The following request has been submitted to your ILL department at TimePosted on DatePosted

Request-Number: RequestNumber

Title: Title

Author/Editor: Author (Editor if Author is blank)

Article Title: ArticleTitle

Article Author: ArticleAuthor

Note: Note

If you have any problems or questions about this request please contact your ILL Office.
Note: Values that are italicized are tokens that can be used in creating the subject and the body of the message.

**Configure the confirmation email**

If you are interested in making changes to the confirmation message sent to the requester please contact [OCLC Support](https://help.oclc.org/Resource_Sharing/Relais_D2D/Relais_Portal/Relais_Portal_for_patrons_and_other_libraries/) and supply the following information.

<table>
<thead>
<tr>
<th>MESSAGE VALUE</th>
<th>INFORMATION TO SUPPLY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>From</strong></td>
<td>Specify which email address to use</td>
</tr>
</tbody>
</table>
| **Subject**   | Specify what text to use and the following token:  
  • Include Request Number? Y/N |
| **Intro**     | Specify what text to use in the introduction as well as any of the following tokens:  
  • Include Library Symbol?  
  • Include Date?  
  • Include Time?  
  • Include Request Number? |
| **Body**      | Specify what text to use at the end of the message body, including any contact information. |
|               | Specify the following tokens:  
  • Include Request Number? Y/N  
  • Include Title?  
  • Include Author/Editor?  
  • Include Article Title? |
<table>
<thead>
<tr>
<th>MESSAGE VALUE</th>
<th>INFORMATION TO SUPPLY</th>
</tr>
</thead>
</table>
|               | • Include Article Author?  
|               | • Include Note?         |