Direct Request Profiles

Use this screen to configure direct request profiles to automate your request process. Direct Request automatically sends patron-generated requests created in your system to Lenders for fulfillment.

Direct Request Profiles allow you to determine how patron-generated requests are processed. Once a patron request has been submitted, with a Direct Request Profile, you can select whether the request, if matching the profile, should be produced (sent) to lenders or forwarded to your New for Review queue.

OCLC recommends creating a Profile for loans and a Profile for copies. Keep the following in mind when you are creating your Profiles:

- Direct Request Profiles are applied based on the Profile Priority setting. A patron-generated request is compared against all profiles. Of all the profiles that match the request, the profile with the highest priority, or lowest assigned Profile Priority number, will be applied to the request.
  - Each profile must have a unique numerical value for Profile Priority.
- The system looks at the Service Type (Copy or Loan) of the request to determine whether the request matches a Profile.

Configure Direct Request Profiles

To add a direct request profile:

1. Click Create New Direct Request Profile.
2. Fill in the fields. See Direct Request Profiles fields below for details.
3. Click Save as New.

To edit a direct request profile:

1. From the Profile Name list, select the direct request profile you want to edit.
2. Edit information, as appropriate.
3. Click Save.

To delete a direct request profile:

1. From the Profile Name list, select the direct request profile you want to delete.
2. On the bottom of the screen, click Delete Direct Request Profile.
3. On the confirmation window, click OK.
## Direct Request Profiles fields

*Note:* Required fields are marked with an asterisk (*).

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile Information</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Profile Name</strong></td>
<td>The name of this profile (20-character limit, with no special characters) that clearly indicates the scope of the group of requests to which the profile pertains. The name must be unique. Note: In reports generated by Direct Request, the profile is identified only by name. Profile names are not case sensitive, so, for example, TEST is the same as test. <strong>Examples:</strong> EARTICLTEST MAXCOPY</td>
</tr>
<tr>
<td><strong>Profile Priority</strong></td>
<td>Set a numeric priority to each direct request profile.</td>
</tr>
<tr>
<td></td>
<td>• When a new patron-initiated request is generated, it is compared to all configured profiles. Requests may match multiple profiles. The profile with the highest priority, or lowest number, will be assigned to the request. Each profile must have a unique numerical value.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>A description of the group of requests to which the profile pertains, up to 140 alpha-numeric characters long. Leave blank if no description is necessary. <strong>Examples:</strong> Loans for faculty Copy requests costing less than $5.00</td>
</tr>
<tr>
<td><strong>Request Sources</strong></td>
<td>• Indicates if the source of a request is relevant to the profile, and if so, the source name or names.</td>
</tr>
<tr>
<td></td>
<td>• If you want the profile to apply to requests from</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
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<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
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<tr>
<td></td>
<td>particular sources, type the names of up to six sources in the boxes provided. Source names can be up to eight alpha-numeric characters. The values must be valid values in your ILL requests.</td>
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<td></td>
<td>• Source names are not case sensitive, so <strong>FSILL</strong> is the same as <strong>fsill</strong>. Spelling is important, however, so <strong>FSlink</strong> is not acceptable as the valid value <strong>FSILL</strong>.</td>
</tr>
<tr>
<td></td>
<td>• Leave blank if the source of a request is not relevant to the profile.</td>
</tr>
<tr>
<td></td>
<td><strong>Examples:</strong></td>
</tr>
<tr>
<td></td>
<td>FSILL</td>
</tr>
<tr>
<td></td>
<td>FSlink</td>
</tr>
<tr>
<td>Request Type</td>
<td>• <strong>Loan</strong> - Only requests for loans will match the profile. (default value)</td>
</tr>
<tr>
<td></td>
<td>• <strong>Copy</strong> - Only requests for nonreturnable copies will match the profile.</td>
</tr>
<tr>
<td>Patron Statuses</td>
<td>• Patron status or statuses, if any, to which the profile applies, up to 65 alpha-numeric characters long.</td>
</tr>
<tr>
<td></td>
<td>• Patron status is not case sensitive, so <strong>Grad</strong> is the same as <strong>grad</strong>. Spelling is important, however, so <strong>Grad</strong> is not the same as <strong>Graduate</strong>.</td>
</tr>
<tr>
<td></td>
<td>• Spaces and commas are not valid; they are used as delimiters between multiple patron statuses. If the profile applies to more than one status, type each status separated by at least one blank space or comma.</td>
</tr>
<tr>
<td></td>
<td>• Leave blank if the status of patrons does not apply to the group of requests you are profiling.</td>
</tr>
<tr>
<td></td>
<td><strong>Examples:</strong></td>
</tr>
<tr>
<td></td>
<td>Grad</td>
</tr>
<tr>
<td></td>
<td>UnderGrad</td>
</tr>
<tr>
<td></td>
<td>Faculty</td>
</tr>
<tr>
<td>Patron Departments</td>
<td>• Patron department or departments, if any, to which the profile applies, up to 65 alpha-numeric</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>--------------------------------</td>
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</tbody>
</table>
| Patron department              | Characters long.  
  • Patron department is not case sensitive, so CompSci is the same as compsci. Spelling is important, however, so CompSci is not the same as CSCI.  
  • Spaces and commas are not valid characters; they are used as delimiters. If the profile applies to more than one department, type each department separated by at least one blank space or comma.  
  • Leave blank if department does not apply to the group of requests you are profiling.  
  Examples:  
  CompSci  
  Chemistry  
  Biology |
| Patron Will Pay Up To          |  
  • The amount (in US dollars), if any, the patron will pay for the requested material.  
  • For a request to match a profile, the amount specified in the request must be equal to or greater than the amount specified in the profile. For example, if the request specifies 7 ($7.00), and the profile specifies 5 ($5.00), the request matches the profile --- a patron willing to pay $7 is also willing to pay $5. On the other hand, if the profile specifies 10, then the profile does not match, because a patron willing to pay $7 is not willing to pay $10.  
  • Type a number. Do not type the dollar ($) symbol. A value of 0 means that the patron is not willing to pay anything for the material being requested. Leave blank if the amount the patron will pay does not apply to the group of requests you are profiling.  
  Examples:  
  6  
  6.00  
  6.10 |
| Need at Earliest/ No Later Than |  
  • Used to define a date range, if any, within which the patron must receive the material. |
In a loan request, the patron’s date requirement is specified in the field named **Need Before**. For example, a **Need Before** value of 4 means that the patron must receive the material within four days of creating the request. To match the profile, the **Need Before** value in a request must fall within the range you specify in the profile by values you associate with **Need At Earliest** and **No Later Than**.

For example, if the profile has a **Need At Earliest** value of 4 and a **No Later Than** value of 7, an incoming request with a **Need Before** value of 5 will match the profile. However, if the patron specifies a **Need Before** value of 3 in the request, the request will not match the profile.

Type a whole number from 0-1000. Leave both fields blank if date range does not apply to the group of requests you are profiling.

- **One or more bibliographic formats that a request must specify if it is to match the profile.**
- **Select a format from the list provided. Do not select a format if it does not apply to the group of requests you are profiling.**

### For Loans:
Used to restrict the borrowing of items that are either very new or very old based on their publication date.

Note: The number you type in **Age of Material** must be smaller than the number you type in **But No Older Than**.

### For Copies:
**Age of Material** can be used to designate whether the copy request is CCG or CCL. The age is pulled from the **Article Date** field. Libraries can set a Copyright designation using Direct Request Profiles. A copy-based request that comes through ILL Direct Request with an Article date field of 1994 could be matched to a Direct Request Profile with CCL in the copyright Compliance field.
<table>
<thead>
<tr>
<th>FIELD</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Type a whole number from 0-1000 representing the age of the material in years. Leave blank if the age of the material does not apply to the group of requests you are profiling.</td>
<td></td>
</tr>
<tr>
<td>Languages</td>
<td>One or more languages that a request must specify if it is to match the profile.</td>
</tr>
</tbody>
</table>

### Route to Review for Purchase

- **If Direct Request Matches Profile**
  - **Do nothing**: Requests will be sent to your New for Review queue.
  - **Route to Review for Purchase**: Requests will be sent to your Purchasing Requests > Review for Purchase queue.

### Route to Review File Options

- **If Potential Duplicate Requests**
  - **Yes**: Potential duplicate requests will be sent to your Review File.
  - **No**: A request can be processed whether or not it is a potential duplicate.

- **If Held By Your Institution**
  - **Do Nothing**: A request can be processed whether or not your institution holds the requested item.
  - **Route to ILL Review**: Requests will be sent to your Review File when your institution holds the requested item.
  - **Route to Document Delivery**: This option will only appear if you have turned on Document Delivery. Select this option to route borrowing requests to the Document Delivery queues if the item is held by your library in WorldCat. For more information, see Set up Document Delivery.

- **If Held By Custom Holdings Group**
  - If you want requests matching this profile to be routed to your Review File when one or more members of a particular group holds the requested item.
item, select the name of the Custom Holdings group record that identifies the group. Select one group name from the list provided.

- The list includes all current Custom Holdings groups for your institution. If group holdings are not relevant to the set of requests you are profiling, do not select a Custom Holdings group.

Examples:

- The group name that represents all library branches on your campus.
- The group name that represents consortia for which you have special borrowing procedures.

### Additional Profile Options

#### Constant Data Record

- The Constant Data record, if any, that applies to the group of requests you are profiling. The list contains all current Constant Data records for your institution.
- Select a Constant Data record from the list provided. Do not select from the list if no current Constant Data record applies to the group of requests you are profiling.
  
  Note: If you want to define a Constant Data record for this group, create the Constant Data record BEFORE creating the profile.

#### Minimum Number in Lender Strings

- The minimum number of lenders that must be specified in the request in order for the request to match the profile. For example, if the minimum number of lenders specified in the profile is 4, an incoming request with only three lenders does not match.
- Choose 1, 2, 3, 4, or 5 from the drop-down list.
- A lender string must have at least one lender.

#### Custom Holdings Path*

Direct Request finds lenders for requests based upon Custom Holdings paths you define. The list contains all current Custom Holdings paths defined for your institution. Select one path from the list provided. Also
**Field**

<table>
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<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Produce the Request</td>
</tr>
</tbody>
</table>

- **Yes:** You want Direct Request to automatically produce requests that match this profile.
- **No:** You want Direct Request to put all matching requests in your Review File so you can review the work done by Direct Request before it is sent to a lender.

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**Prefer E-article processing**

- This option applies to your library only if it has added metadata about its electronic collections to the WorldCat knowledge base and activated a link to the WorldCat knowledge base. Then your library is ready to use Direct Request for articles or Direct Request for e-books.
- This option has three values: **No**, **E within group**, and **E across groups**:
  - **No:** This is the default value. It leaves Direct Request for articles and Direct Request for e-books turned off. Select this value for all of your Direct Request profiles if your library has not added its metadata and activated the link to the WorldCat knowledge base. If your library has activated the link, use **No** for Direct Request profiles that are not copy profiles for articles or loan profiles for e-books. Use **E within group** or **E across groups** for Direct Request profiles that are copy profiles for articles. Use **E within group** for Direct Request profiles that are loan profiles for e-books so e-book requests will be searched in the knowledge base even though all e-book requests will be placed in your Review file for action and not sent automatically to potential lender.
  - **E within group:** For each Custom Holdings group in your Custom Holdings path for articles, Direct Request selects lenders who have an electronic version of the article and then selects lenders who have a print copy only. **Example:** In a path containing two groups, Direct Request selects lenders in this order: group 1 lenders who have an electronic version; group 1 lenders who have a print copy only; group 2 lenders who have an electronic version; group 2 lenders who have a print copy only.
• **E across groups**: Across all Custom Holdings groups in your Custom Holdings path for articles, Direct Request selects lenders who have an electronic version of the article and then selects lenders who have a print copy only.

**Example**: In a path containing two groups, Direct Request selects lenders in this order:

- group 1 lenders who have an electronic version;
- group 2 lenders who have an electronic version;
- group 1 lenders who have a print copy only;
- group 2 lenders who have a print copy only.