Search for requests

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Find information about Exact Query options, Advanced Query options, and the Side Menu in Relais ILL.

Overview

See also Query results.

Query is used to find a specific request or lists of requests and displays by default when the user logs in.

The Exact Query displays by default.

• Use the Exact options to find a request by inputting values such as a Request Number, Barcode, ISBN or ISSN.

To view the Advanced Query options, click More Options.

• It is possible to display the Advanced Query options by default. Contact your local Relais Administrator to request this change.
• Use the Advanced options to enter keywords, dates or a patron id for example.

The Side Menu displays a series of queues, statuses and pre-defined queries for requests.

• Click on an entry to see the corresponding request or request list.
• To hide the side menu section on the left of the page and maximize the main display, click the left arrows above the Query button.

The query returns either a single request or a request grid matching the search term or terms entered.

• If no requests are found a message displays: Your search did not retrieve any requests. Please try again.

At any time, click on Query in the side menu to display the query options.

Exact Query options

The following options are available for Exact Query

• Request Number - the Relais request number.
• Barcode - at the time a request is updated as a loan, the barcode that you assign.

1. Select the type of search you want to do and enter the corresponding value.
Any characters entered are converted to upper case.

2. After entering the value click **Search** under the input box or hit Enter.
   1. If you entered the value using a barcode reader or wand, it may be programmed to automatically enter the value.
   2. If you select an option from the drop down other than Request Number, this option continues to display until:
      - You select a different option.
      - You click **Clear**.
      - The search returns multiple requests.
   3. The result or results of the search display.

**Tips for using Exact Query**

- The Exact search returns ALL requests (open and closed) that meet the search criteria with the exception of barcode. The barcode search returns only OPEN requests.
- If the cursor is in the Exact input box only this value is used any other criteria entered below, i.e., in the Advanced options, are ignored.

**Clear**

To clear the value entered click **Clear** under the input box. The value in the drop down is also reset to the default, e.g., Request Number.

**Configuration options for Exact Query**

You can configure any of the following based on the staff group:

- What options to display.
- What option displays as the default, i.e., at the top of the list.
- The description for each entry in the list.
- The order in which the entries display.

Note: To make changes to the values in the Exact Query drop down or any other configuration changes contact your local Relais D2D Administrator and specify the changes you want.

**Advanced Query options**

Multiple options are available for more advanced searches. These are:

- Date and date ranges
- Title, author and call number
- Patron ID and current supplier
- Request type
You can enter multiple search criteria which are combined using AND logic.

Once you have made your selections and entered the values, click **Search** at the bottom of the page.

### Date and date ranges

You can use a variety of date types, single dates, pre-defined date ranges to retrieve requests. Dates can be searched alone or in combination with other criteria.

**Date to search**

Select from the drop down which type of date to search.

The following dates can be searched:

- Submitted (default) - the date the request was submitted.
- Delivered - the date an item was sent electronically, the date a cover page was printed for a loan or the date a message was sent to the requester via one of the delivery applications, e.g., Delivery Email (note this does not includes messages sent via Notify Patron or General Message).
- Due date (does not display in the default list - the due date for an item on loan to the requester).
- Last updated - the date the request was last updated.
- Need by date - the date specified by the requester as the need by date.
- Sent to supplier - the date the request was sent to the current supplier.
- Entered - the date the request was entered into the database (in most cases this is the same as the date submitted).

**Date from and Date to**

Once you have selected the type of date to search you may select a date or range of dates or a pre-defined date range.

To search for requests on a **specific date**, e.g., requests submitted on Dec 2, 2016, use the Date from calendar and select the desired date.

To search for requests from a **specific range**, e.g., requests with need by date between Jan 8, 2017 and Jan 15, 2017, use the Date from calendar and select Jan 8, 2017 then use the Date to calendar and select Jan 15, 2017.

**Day range**

If you prefer, you may use pre-defined ranges of dates rather than specific dates from the calendar.
There are multiple options to choose from:

- Last 5 days = the current day minus 5 days, for example, for Dec 12, 2016 this includes Dec 7, 2016 through Dec 12, 2016
- Last 10 days = the current day minus 10 days, for example, for Dec 2, 2016 this includes Dec 2, 2016 through Dec 12, 2016
- Last 30 days = the current day minus 30 days, for example, for Dec 12, 2016 this includes Nov 12, 2016 through Dec 12, 2016
- Previous month = for example, for Dec 12, 2016, this includes Nov 1, 2016 through Nov 30, 2016
- Current month = for example, for Dec 12, 2016, this includes Dec 1, 2016 through Dec 31, 2016

Configure the Day range option

You can configure any of the following based on the staff group:

- What options to display
- What option displays as the default, i.e., at the top of the list
- The description for each entry in the list
- The order in which the entries display

Tips when searching dates and ranges of dates

- When the calendar displays the current date is highlighted with yellow, the date you select is circled in red.
- Date to is enabled only after you select a Date from
- If you do not select a Date to and from, or a Day range then ALL dates are searched
- If you select a Day range any specific dates to and from are cleared and these fields disabled. To enable the date to and from again, select Day range = None

Title, author and call number

You can use information from the request such as title and author to retrieve requests. These values can be searched alone or in combination with other criteria.

Exact title

Enter the full title or the beginning of the title of the publication.

For example, to retrieve requests from "MODERN PYROTECHNICS; - FUNDAMENTALS OF APPLIED PHYSICAL PYROCHEMISTRY", enter "MODERN PYROTECHNICS"

Tips when searching Exact title

- All characters entered are converted to upper case
- This is a character by character search. For example, if you enter HARRY POTTER, requests with the following titles are retrieved:
  - HARRY POTTER AND THE DEATHLY HALLOWS
Title keywords

Enter one or more keywords from the title of the publication.

Author keywords

Enter one or more keywords from the author of the publication.

Tips when searching keywords

- All characters entered are converted to upper case
- Any words/terms from the stop word list are ignored
- All title and author keywords are combined using AND logic

Call number

Enter the call number from the request.

Tips when searching Call number

- Characters entered are case sensitive

Requester (Patron ID or Library Symbol) and current supplier

You can use information about the requester, either your patron or another library, and the current supplier-supplier to retrieve requests. These values can be searched alone or in combination with other criteria.

Supplier code

Enter the supplier code for the current supplier.

Tips when searching Supplier code

- A percent (%) can be used for right-hand truncation. Once a percent (%) has been entered no additional characters can be entered.
- All characters entered are converted to upper case

Library symbol

Enter the library symbol for the requesting library.

Tips when searching Library symbol

- Characters entered are case sensitive
- Truncation is not allowed
Patron ID

Enter the ID for your patron.

Tips when searching Patron ID

• All characters entered are converted to upper case
• If more than 1 patron record is retrieved an error message is returned: "More than 1 patron record was retrieved for the value entered."

Request type

You can limit your search to a specific request type when retrieving requests. This value can be used alone or in combination with other criteria.

From the drop down select which Request type to search.

Search for Open or All requests

By default the Advanced options search and retrieve only open requests. (The default can be changed to search for all requests).

To search and retrieve all requests, click All requests, prior to executing the search.

• Open requests = requests that are still active, i.e., a loan has not been returned
• All requests = open requests and requests that are no longer active

Sorting results

By default when more than one request is retrieved the results display in a grid in Request number and ascending order.

You can configure another option as the default.

You can change the field used for sorting, the list of Sort by options is:

• Request Number = Relais request number
• Title = title of the publication
• Author = author of the publication
• Submitted on = the date the request was submitted
• Need Before = the need by date for the request
• Due Date = the date a loan is due
• Status Date = the date of the most current status
• Status = the status of the request
Select which option to use for sorting before you click Search. Note that you can also change the sort order once the results grid displays.

In addition you can indicate whether to sort the results in Ascending or Descending order.

**Configuration options for the Advanced Query**

1. As noted in the descriptions above many of the drop downs that displays as part of the Advanced query page can be configured.
   - Date to search
   - Day range
   - Request type
   - Sort by
   - Sort order

   For each of these drop downs you can configure any of the following based on the staff group:
   - What options to display
   - What option displays as the default, i.e., at the top of the list
   - The description for each entry in the list
   - The order in which the entries display

2. You can configure the text that displays for the label of each searchable field.
3. You can configure whether to search Open or All requests by default.

Note: To make changes to the drop downs or values for the Advanced Query options or any other configuration changes contact your local Relais Administrator and specify the changes you want.

**Side Menu**

Staff can use the side menu:

- To retrieve and display requests.
- To look at current workloads, e.g., how many requests in Relais queues such as Print Request.

The side menu has two main sections:

1. **Requesting** - for requests from your patron
2. **Supplying** - for requests for which your library is the current supplier

Each section has three sub-sections

1. **Queues** - for requests in Relais queues, e.g., Print Request, Email Request and Process Request
2. **Loans** - for requests currently on loan
3. **Pre-defined queries** - a list of pre-defined queries to help staff identify specific requests, e.g., requests that have
printed but have not been updated for 3 days.

For each section, subsection and entry in the side-menu the number of requests display.

If there are no requests to retrieve, e.g., in a Print Request queue, then no entry displays in the side menu.

Staff can expand and collapse each section and sub-section using the up and down carets.

Staff can refresh any sections or entries by clicking the refresh icon.

After clicking on an entry, the corresponding request or requests display.

**Configuration options for the Side Menu**

The following can be configured in the side menu:

- Hide entries that are not helpful or useful for staff
- Change the name of any sections, subsections or entries, e.g., rename Requesting to Borrowing.
- Add pre-defined queries. For example follow:
  - Supplying: Requests > 2 days old
  - Requesting: Requests > 3 days old