Introduction

The March release of Relais provides a number of new features and enhancements in addition to several bug fixes.

Improvements to the Relais ILL and D2D staff portal version 3.11

New Staff Portal features will be available with the Portal 3.11 release. These features are applicable to both Relais ILL users and D2D users.

Portal 3.11

Improved functionality:

- Blank ILL request form available to submit a request on behalf of a patron external library
- In staff search result, suppliers (locations) from multiple records can be added to a single request

Improved user experience

- Copy to clipboard button will be available beside the title of and the author of article fields in the bib info tab
- Copy to clipboard button beside each e-resource link
- Cover page image will be displayed in the brief view of each staff search result record
- In the staff search result, date and format filter options applied as soon as selected
- In the staff search result, links to additional search resources available
- In the staff search form:
  - a clear button available beside each field
  - each field expands to display the entire contents of the field
  - reset button available to populate the search form with information from request
  - In the constant request info section, links to additional search resources available, as well as links to transfer a request to WS ILL and DOCLINE

Improved access to information

- Expiry date can be viewed and edited in the request Info tab
• Publication date will be visible in the constant request info section
• Duplicate request option in the bib Info tab will include multiple matching options
• Quoted amount presented to patron and external library when viewing details of a request
• The quoted amount included in the add request confirmation email

Improvements to the Relais D2D patron discovery service, version 3.13

New Patron Discovery features will be available with version 3.13. These features are applicable both to Relais ILL and D2D users.

Discovery 3.13

• Improved traceability of request processing
• Email subject and body recorded in audit notes
• Renewal notes included in renewal request email and recorded in audit record
• Note entered when cancelling a request recorded in audit record

Many of these enhancements are the direct result of your feedback.

Recommended actions

For this release, we recommend that you review the following checklists and complete the relevant tasks so that you can adjust your policies and workflows and train your staff. These checklists identify updates that we have determined as significant for most institutions. We encourage you to review all of the items in the release notes to determine whether there are other items that might require additional action or follow up by your institution.

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.

<table>
<thead>
<tr>
<th>ACTION</th>
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<tbody>
<tr>
<td>Share these release notes with your colleagues.</td>
</tr>
</tbody>
</table>

New features and enhancements
Improvements to the Relais ILL and D2D staff portal version 3.11

The changes outlined below are applicable to both Relais ILL and D2D users.

Improved functionality

A blank ILL request form will be available for a library staff person to submit a request on behalf of a patron or an external library.
In the staff search result, suppliers (locations) from multiple records can be added to a single request. Staff click on the checkboxes in the location table to select individual suppliers and add them to the request.

Once a supplier has been selected, a form will be open, pinned to the bottom of the browser window.
The pinned form can be resized to help users make the most of their screen space.

The pinned form can be used to manage a routing list from multiple search results.
Once a supplier is selected from a new record, they will be automatically added to the supplier list in the pinned form.
Here is full view of the pinned form:
Submit request for: Patton - NATHAN MOORE (MOORE) Change Patron

Select a pickup location and click the Request button to order this item from the CONSORTIA.

Delivery Info | Bib Info | Request Info
---|---|---
Volumes needed

Notes

Select a copyright compliance
(Non)

Select a messaging method
E-mail

Messaging address
mooren@oclc.org

Select a delivery method
Mail

Delivery address

Select a pickup location
(Non)

Address1
1690 Woodward Drive

Address2
Suite 215

City
Ottawa

Country
Canada

State / Province
ON

Zip / Postal code
K2J 4T5

Will accept a digital copy, if available?

☐ Yes  ☐ No

☐ * Acknowledgement of copyright compliance with DEBRA's library
☐ * Acknowledgement of item care instructions during the pandemic
☐ * Acknowledgement of physical return rules during pandemic
☐ * Please acknowledge that you accept the institution's conditions for placing requests.

Submit Request

Est. arrival date for BLTW: NA

Up to 12 suppliers can be included in the request routing list

↑ ↓ Move To  |  Delete  |  Load balancing: Sequenced Fair Load Balancing  |  ☑ Supplier of last resort

<table>
<thead>
<tr>
<th>Source</th>
<th>Supplier Code</th>
<th>Shelving Location</th>
<th>Call Number</th>
<th>Availability</th>
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<tr>
<td>BLTW</td>
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<td>QA76.2.J63 I83 2011</td>
<td>Requestable</td>
</tr>
<tr>
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<tr>
<td>OCLC</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
**Improved user experience**

A *Copy to clipboard* button will be available beside the *Title of article* and *Author of article* fields in the Bib Info tab.

![Bib Info Form](attachment:image)

A *Copy to clipboard* button will be available beside each e-resource link.
A cover page image will be displayed in the brief view of each staff search result record.

In the staff search result, users will now be able to select from date and format filter options that will be...
applied as soon as selected without pressing the Apply button

The Apply button has been removed.

In the staff search form:

- Each field will expand to display the entire content of the field making it easier to see full titles, authors, etc.
- A clear button will be available beside each field, so users don’t have to select and delete manually.
- In the staff search form, a reset button will be available to populate the search form with the information from the request.

In the staff search result, links to additional search resources such as WorldCat, Internet Archive, PubMed and Directory of Open Access Journals (DOAJ) will be available

Additional search resources can be added if URL parameters are supported by the catalog. The link will be based on the format of the search result and will be constructed using the information in the search result record. Clicking on Additional Resource(s) will open a modal with links to the resources.
In the constant request info section, links to additional search resources such as WorldCat, Internet Archive, PubMed and Directory of Open Access Journals (DOAJ) will be available. Links to transfer a request to WS ILL and DOCLINE will also be available.

The link will be based on the request's delivery type (loan/copy) and will be constructed using the information in the request. Additional search and transfer request resources can be added if URL parameters are supported by the resource.
Additional Resource(s) modal for returnables and non-returnables:
Improved access to information

The publication date will be visible in the constant request info section and the expiry date can be viewed and edited in the Request Info tab
The duplicate request option in the bib info tab will include four options:

- Duplicate patron request
- Duplicate patron request (keyword)
- Duplicate system request and
- Duplicate system request (keyword)
The top border of the pinned duplicate list container can be pinched and dragged to resize the container.

When a charge is included in the request, the quoted amount will be presented to the patron and the external library when viewing the detail of a request.

The quoted amount will be included in the add request confirmation email.

Improved traceability of request processing

The email subject and body will be recorded in a requests audit notes when:

- Borrowing staff initiates a message to the patron
- Borrowing library staff creates a message for the supplying library staff
- Supplying library staff creates a message for borrowing library staff
Renewal notes will be included in the renewal request email and recorded in the audit record and the note entered while cancelling a request will be recorded in the audit record.

Patron D2D Discovery improvements (not applicable to Relais ILL)

The changes outlined below are applicable to D2D users. They are not applicable to Relais ILL users.
Improved user experience

The CCL query above the search result will be editable

Copy to clipboard button will be available beside each e-resource link

A cover page image will be displayed in the brief view of each search result record
In the search result, date and format filter options will be applied as soon as selected.

The Apply button has been removed.

In the advanced search form:

- A clear button will be available beside each field.
- Each field will expand to display the entire content of the field.
Known issues

There are no known issues to report at this time.

Support website(s)

Support information for this product and related products can be found at:

- Relais D2D
- Contact OCLC Support
- OCLC Community Center
- Browser compatibility chart