Relais D2D Release Notes, February 2020

Release Date: February 3, 2020

Introduction

This release includes a major new feature for the Relais staff web portal and several new features to processes that run in the hosted environment.

Portal 3.0

- Staff search:
  - Staff can search and place a request on behalf of a patron and/or library
  - Lenders for requests in manual search queues can be searched and assigned to a request's routing list

Relais 2019.2

- A new Search Auto Windows service created to better support handling of automatic request routing updates.
- D2D to ILLiad configuration updates to allow dynamic field mapping between RelaisD2D and ILLiad.
- Support for Fujitsu fi7700 scanners

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.

Administrative actions

These items require immediate action or decisions.

<table>
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<tr>
<th>ACTION</th>
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<tr>
<td>Submit a support ticket to request which new feature(s) you would like turned on for your library</td>
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Follow-up actions

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

**ACTION**

Share these release notes with your colleagues.

**New features and enhancements**

**Portal 3.0: Staff Search**

Staff can now search for and create requests on behalf of patrons or libraries through the staff web portal. This feature will allow staff to find potential suppliers within or outside the library/consortium and use them to create a routing list for the request.
A short video presentation outlining this new feature can be accessed here.

Relais 2019.2

Search Auto service

A new Search Auto service has been created to better support handling of automatic request routing updates. The new service supports the following scenarios encountered when updating a routing list:

- Initial search and assignment of a lender to a request
- Ability to have the next lender in a routing list re-evaluated for availability before moving on the request to that lender
- Ability to update a partial routing list submitted from Discovery (Relais D2D)
- Enhanced format matching in cases where more than one result is returned by the Search web service to find, among all the results, a matching record for the request

D2D to ILLiad

Configuration options for the D2D to ILLiad feature now provide better support for each library’s unique configuration of their ILLiad platform

Support for Fujitsu fi7700 scanners

The Fujitsu fi7700 scanner is now supported in the Scanner application for Relais ILL customers
Bug fixes

Bug with the Update Patron Record application fixed so that when a patron name or surname is inserted or updated, it is no longer converting the names to upper case but rather maintaining the exact case of the name as they come in in the xml file.

Known issues

There are no known issues to report at this time.

Important links

Support website(s)

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

- Relais D2D