Staff search

Find information about Staff search in Relais ILL.
'Staff search' allows staff to search targets to place a request on behalf of a patron or library or find suppliers for a request that has come in via a patron request form. If a single result is returned for a search in 'staff search', the user is no longer required to select the single search result to see the added details and associated requested response. The record will now expand automatically. This is a new function in Portal 3.1.

The staff search function can be found in the side menu of the Staff Portal.

Staff search window

The staff search window allows staff to key in search criteria pertinent to the search that they wish to conduct. In the staff search window, staff can select a defined group of targets that can be used to search under specific criteria.

Search groups

Staff servicing lending requests from other institutions or requests from their patrons may have access to two search groups in the staff search window, 'Lending' and 'Borrowing'. The lending group uses the staff member's home library target for search, and the borrowing group uses the staff member's home target and a variety of other preferred targets.
for search. Additional groups can be configured if needed.

**Search criteria**

Drop-down menus allow staff to choose from a selection of search criteria. Staff can either use a single or multi-criteria search to fulfill the service request for a patron or library.

To run a search:

1. Choose a **Search group** (Lending or Borrowing)
3. Click on **Search**

**Search results window**

When staff members click **Search** on the staff search window, the system executes and merges like materials based on batching against title, author, publication date, and format. Staff can also narrow the number of results, by filtering either/or by publication date and format. If the material requested is displayed then staff can select one of the results that appear in the list by clicking on that record. If the result does not appear then staff can click 'revise search'.

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**Submit a request**

Staff can submit a request on behalf of the patron or library by clicking on the record. If configured, the record will show additional bibliographic information.
Search for patron or library

1. Click on the drop down menu and choose either patron or library.
2. Depending on the option you choose, the system will ask you to identify the patron or library that you are submitting the request for.
3. Click Search.
4. Choose patron or library record associated with the lending request.
5. Click Select. The patron or library record will appear on the fulfillment statement window.

Note:

If the patron or library does not exist in the Relais database then a message will pop up stating the record does not exist. If the patron record cannot be found and NCIP is enabled, then another window will appear asking for the patron barcode. Once the barcode is entered, the system will search the ILS looking for the patron and library. Based on the configuration, Relais will create a skeletal patron record, allowing you to continue with the request submission.

Fulfillment window

The patron or library record appears on the fulfillment window. If staff need to place more than one request for a patron or library, they can click the retain option to retain the patron or library. The record details will be kept and staff will not have to reidentify the patron or library for subsequent searches. If staff members have associated the incorrect patron or library with the title being requested, they can click 'Change Patron' in order to search for the correct patron or library to place the request for.

If staff members are placing a request on behalf of a patron and there are locally available locations returned in the search, staff members will be presented with two options for responding to the request. They can 'Place a local hold' or 'Submit a request. The default option is 'place a local hold'. Staff can transfer to the local catalog and place a hold on the title for the patron and the request would be handled within the ILS.

Volume/issue summary of holdings display

The staff search request detail display includes a field of information when displaying journal/article results. The volume/issue number field may include summary holdings and/or volume and/or issue details associated with the journal/article material if supported by the Z39/50 target returning the results.

As some serial material may include number volume and issue record details, the option to display more or less detail is included within the volume/issue number field and can be selected by staff on a record by record basis, as desired.

Display of e-resource URL(s) and copy form button

- Local and non-local e-resources may be displayed within the expanded bibliographic info section.
- When the local or non-local e-resources are clicked, the modal will display and provide information associated with each e-resource as defined within the MARC 856 tags.
- The copy e-resource option in the lower right of this modal will automatically copy the displayed information including full URLs to the user's clipboard.
Note:

This same copy form feature has been added to the Staff Portal, Bib Info, Request Info, and Delivery Info tabs to make the capture of data on these forms easier for staff members who may require it.

**Lending sequencing and turnaround time**

**Lender Sequencing and Turnaround Time**

When enabled, library staff will be able to see an estimated arrival date from the supplier in the routing list when using the staff search function. The date format is configurable.

Load Balancing options include:

- Supplier Sequencing (based on pre-configured sequencing)
- Supplier Turnaround Time Tiering
- Sequenced Fair Load Balancing (Consortia)
- Turnaround Time Fair Load Balancing (Consortia)

In the request routing tab, the estimated turnaround time associated with each of the suppliers can be displayed in the routing list grid, if the data is available and enabled.
To place a local hold:

1. Click Place local hold.
2. Click Transfer.
3. Place hold on material for the patron in the local library catalog.

If the patron is a distance education patron, staff can choose the 'Submit request' option. This allows staff to fill the request through Relais.

Whether staff members select the 'Submit request' option, or it appears by default because locally available locations are no returned, the search will return all available locations to build a routing list. If there are multiple available locations, staff can use the up/down arrows to re-order the locations in the routing list prior to submitting the request.

To place a hold through Relais:

1. Click Submit request.
2. Validate delivery/messaging details.
3. Acknowledge any conditions for submitting the request.
4. Click Submit.

A message will appear in the fulfillment window stating that the request has been submitted with a request number. An email will be automatically sent to the patron or library stating that that ILL request has been submitted on their behalf.