Release Date: April 7, 2021, and May 4, 2021

Introduction

Part 1: April 7

Portal 3.5

Several new features are available on the staff portal pages:

- Display of dynamic staff alerts by alert type in the side menu
- Notify patron and general message functionality to allow communication with patrons and between lending/requesting libraries from within the staff portal
- The ability for staff to choose how they wish to sequence the lenders in a request's routing list. The choices include Supplier Sequencing, Supplier Turnaround Time Tiering, Sequestered Fair Load Balancing, and Turnaround Time Fair Load Balancing. The latter two choices are primarily for use in the D2D environment.
- Turnaround time
  - Calculation of the turnaround time for a given lender and the ability to display the estimated date of arrival of the material from that lender
  - Display of the estimated date of arrival in the constant request data section of a request

The patron portal includes one new feature

- Display of the estimated date of arrival in the request detail section

Several improvements were made to the portal environment:

- Improved accessibility in the portal user interface
- Update request detail service to include status related to fulfillment of copy requests
- Multilingual e-mail template(s) can now be configured for the add request confirmation email

Relais 2021.1.2

Delivery Email updates
• Allow Delivery Email to update resource_name on Delivery Resend
• PostToWeb output file will now include a size check

**Turn Around Time**

• A new .NET service to calculate turnaround time on request activity
• Windows applications updated to track fulfillment events for turnaround time

**Discovery Web Services 2.6**

• Multilingual e-mail template(s) can now be configured for the requested item web service
• Requestability service will be able to load balance suppliers based on turnaround time

**Part 2: May 4**

**Portal 3.5.1**

Several bug fixes and two new features have been added to address issues found in Portal 3.5

• Ensure that search terms reflect the current request when users switch from one request to another in queues linked to staff search.
• Ensure that sorting on the "Submitted On" or "Status Date" fields by ascending or descending is sorting correctly.
• Ensure that the “Additional Numbers” field displays data on the genre request form even if the field is hidden from the display when data is passed within an Open URL.
• Ensure that the MSG_OUT_ANSWER field is updated properly in the service when processing a "Renew NO" response.
• Ignore the Internal Service Error within the Request Routing tab when the service is unable to retrieve the estimated arrival date for an unregistered supplier.
• Enable configurable buffer day(s) to the estimated arrival date to account for configured working hours and holidays.
• Enable configurable availability override for catalogs before calling Requestability service in staff search, thus allowing materials to be considered requestable by staff.

**Recommended actions**

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.
IMPORTANT: If your library would like to take advantage of the new turnaround time functionality for staff and patrons you will be required to upgrade your local server install of Relais to version 2021.1.2.

Relais 2021.1.2

Download the Relais 2021.1.2 build from either the North American server or the Australian server.

Relais 2021.x install/upgrade instructions can be found here. Relais 2021.x application, service, and DLL versions can be found here.

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.

Review the Relais documentation at Relais ILL.

New features and enhancements

Portal 3.5

Staff Portal

Display of alerts, by type, in the side menu

Alerts associated with requests will now be displayed to staff, by type in the side menu. Staff members will be able to accurately see when a new alert has come in and clicking on the alert type will bring up the request(s) associated with that alert where staff can act upon it. Once addressed, dismissing the alert will remove the request from that alert type in the side menu.

Unparsable messages will display at the bottom of the side menu. These messages are messages received by the ILL Message Handler into the GSM or ISO email accounts or via TCP/IP and which were unable to be parsed.
When staff select to display an alert type for which multiple messages have been received, as indicated by the message count displayed in brackets to the left of the alert type description, a grid will display showing the requests to which the messages are associated.

Note:

If multiple messages received are related to the same request the record count for the grid will not match the message count.

Selecting a request from the grid will result in the request details display and the Alert message displayed between the request's constant request data and the processing tabs.
Unparsable messages, by their nature, are not associated with a request.

The grid that displays when multiple unparsable messages display limited unparsable message specifics including the date received, the sender, and the subject. When staff selects a specific message fuller message details are displayed.

Staff members have the ability to Dismiss Alert (delete) and Pin Alert which will pin the alert message at the bottom of the Staff Portal forms so additional staff processing functionality can be accessed (i.e. Query) to enable staff to identify the request to which a message might be related and update accordingly while still being able to see the alert message specifics.
Notify patron

Staff, when viewing a patron request configured with a messaging method of email and an email address, will see the “Patron Message” button displayed within the button options at the bottom of each processing tab (Loan | Supply | Unfilled/Cancel | Bib Info | …)
The Notify message input field, if displayed, enables staff to select from a pre-configured list of patron messages that can be used as a template to assist staff in the preparation of the desired message. These pre-configured messages are configured via the use of the Table Maintenance function.

Note: The constructed message can include HTML.
Message Patron

All fields marked with an asterisk (*) are required.

Request number: PMF-99901879
Patron name: MARK FINLAY
Patron email: finlaym@oclc.org
Notify message: In-Transit
Hold in queue: Awaiting Response

Message:* Services Desk. You must have your library card with you as the item will be signed out to you on your Novanet account. Please let the Access Services staff know that this is a 'Relais In-Transit' item. If the item is not picked up within one week of this notice, it will be returned to the owning Library. <p>Please send any replies to this message to ill@yourlibrary.ca</p> <p>Thank you</p> <p>Your Library</p> <p>Circulation Dept</p> (555) 555-5555

Submit | Reset | Cancel

General message

When requesting staff view a request from their patron, and when the current supplier is not associated with their institution, the Message Supplier button, if enabled, will display at the bottom of each processing tab (Loan | Supply | Unfilled/Cancel | Bib Info | …) and which will enable the generation of a general message to the supplier based on the supplier’s preferred communication method.

When supplying staff view a request from another institution the Message Requester button, if enabled, will display at the bottom of each processing tab (Loan | Supply | Unfilled/Cancel | Bib Info | …) and which will enable the generation of a general message to the requesting library based on the communication protocol associated with the request.

Selection of either the Message Supplier or Message Requester options will spawn the associated modal.
**Lender Sequencing and Turnaround Time**

When using the Staff Search function, and when a routing list of requestable suppliers is displayed, the estimated arrival date from the first supplier in the routing list will be displayed to staff, if enabled.

<table>
<thead>
<tr>
<th>Source</th>
<th>Supplier Code</th>
<th>Shelving Location</th>
<th>Call Number</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>BVAU</td>
<td>BVAU</td>
<td>BVAU</td>
<td>QA76.2,J63 J83 2011a</td>
<td>Requestable</td>
</tr>
<tr>
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<td>BVAS</td>
<td>QA76.2,J63 J83 2011</td>
<td>Requestable</td>
</tr>
<tr>
<td>BVAC</td>
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<td>BVAC</td>
<td>QA76.2,J63 J83 J3 2011</td>
<td>Requestable</td>
</tr>
<tr>
<td>BLTW</td>
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<td>QA76.2,J63 J83 2011</td>
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<tr>
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<tr>
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<td>Requestable</td>
</tr>
<tr>
<td>BKCC</td>
<td>BKCC</td>
<td>BKCC</td>
<td>QA76.2,J63 J83 2011</td>
<td>Requestable</td>
</tr>
</tbody>
</table>

**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)

When staff members access the Request Routing tab, and when enabled, the routing list grid will display the turnaround time associated with each of the suppliers in the routing list if the data is available.

When staff query a request the estimated arrival date associated with the current supplier will be displayed, if enabled, within the request constant data.

**Patron Portal**

When a patron or library, accessing the Portal My Accounts function will now, if enabled, be presented with the estimated arrival date associated with their request once the request has been routed to the current supplier.
Bug fixes

- ILL message handler - ensure GSM messages do not reference notes multiple times

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 ILL