Introduction

Portal 3.9

New Staff Portal features are available with the Portal 3.9 release:

- Staff Search - enable entry/edit of additional bibliographic, request, and delivery information fields when staff generate a request on behalf of a patron or library (i.e. can now add article title and article author, etc., when creating a request from search results).
- Additional Charges – enable staff to enter/edit additional charges to be applied to a request and record charges for material supplied by external suppliers.
- Enable a request to be automatically locked to staff viewing the request and unlocked automatically when staff move on from the displayed request.
- Enable staff to manually "Unlock a Request" that is currently locked for processing by someone else.

Staff Portal improvements have also been made based on customer feedback:

- Improved readability of notes fields.
- Request number is maintained in a prominent position (upper right corner) of the display when scrolling is required and includes an icon to automatically copy the request number to the clipboard.
- A progress bar has been added to the "Download" modal to advise users of processes related to the download of the PDF image (Patron/Library Portal).
- The originally logged-in staff user will be referenced in the audit history of any request which is processed by/"Acting as" as a "substitute user".
- TAT statistical reporting now includes a report to enable evaluation of the efficacy of estimated arrival date (EAD).
- If desired TAT statistics can now be configured to calculate and display Heversine distance.

The following bugs have also been exterminated with the Portal 3.9 release:

- Zendesk 519878: “Loan” tab does not advance to the next Request number when a lookup is performed via “OCLC request number”.
- Zendesk 526325: “Loan” tab is not recalculating the Due Date when the request number is changed to the next request.
- Zendesk 519313: “Recall/Renew” tab is not clearing notes field when the request number is changed to the next request.
- Zendesk 527268: Ensure the display and updates to the Call Number field made on the BibInfo tab are to the same
Relais 2022.1

Bugs exterminated:

• Zendesk ticket: 521696: Delivery Email application revised logic when resource_name is null to ensure routing to Delivery Failed is appropriate.
• NCIP Place Hold application revised to ensure recording of the request fulfillment entry for the current supplier when unable to place a hold.

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>Portal 3.9</td>
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<tr>
<td>• The feature to enable a request to be automatically locked to staff viewing the request and unlocked automatically when staff move on from the displayed request is enabled by default with this release. If this feature, designed to prevent two users from processing the same request at the same time, is not desirable please enter a Zendesk ticket and request this feature be disabled.</td>
</tr>
<tr>
<td>• The feature to enable staff to manually unlock a locked request is enabled by default with this release. If this feature, designed to prevent two users from processing the same request at the same time, is not desirable please enter a Zendesk ticket and request this feature be disabled.</td>
</tr>
<tr>
<td>• When desired the Search feature can be enabled when a request resides in a defined processing queue (i.e. Search Manual, Review Queue, etc.). With Portal 3.9, the search feature can be configured as an additional processing option and not as the primary feature if desired. i.e. When processing the Search Manual queue staff may desire the &quot;advanced search&quot; modal to appear immediately when a request is selected however when processing a request in a Review Queue staff may instead want the applicable processing tabs (Loan, Supply, Unfill/Cancel, Request Routing, etc. to display first and with an option to &quot;Search&quot; if desired. To enable queues to have access to the Search feature as a secondary option please enter a Zendesk ticket requesting modification to your existing configuration as desired.</td>
</tr>
<tr>
<td>• The Additional Charges option is enabled by default. If this feature is not desired please enter a Zendesk ticket to request this feature be displayed for your institution.</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.
- Review the Relais documentation at [Relais ILL](https://help.oclc.org/Resource_Sharing/Relais_D2D/Release_notes_and_known_issues/2022_release_notes/100...).

## New features and enhancements

### Portal 3.9

**Staff Search - enable entry/edit of additional bibliographic, request, and delivery information fields**

Enable entry/edit of additional bibliographic, request, and delivery information fields when staff generate a request on behalf of a patron or library. Now Staff is able to add article title and article author, etc., when creating a request from search results.
<table>
<thead>
<tr>
<th><strong>Electronic Resource</strong></th>
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<td>Show Non Local E-Resources</td>
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Submit request for: * Patron  MARK FINLAY (FINLAY)  Retain Change Patron

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

### Delivery Info

- **Journal title:** CA magazine
- **Volume:**
- **Pages:**
- **Issue:**
- **ISSN 1:** 0317-6878
- **ISSN 2:**
- **Publication date:**
- **Publisher:** Canadian Institute of Chartered Accountants
- **Place of publication:** Toronto
- **National bib num.:**
- **LCCN:** 7
- **System number:**
- **OCLC:** 1787862

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**Additional Charges**

Enable staff to enter/edit additional charges to be applied to a request and record charges for material supplied by external suppliers.
Staff user manual "Unlock Request"

Enable staff to manually "Unlock a Request" that is currently locked for processing by someone else.
Bug fixes

Portal 3.9

- Zendesk 519878: “Loan” tab does not advance to the next Request number when a lookup is performed via “OCLC request number”
- Zendesk 526325: “Loan” tab is not recalculating the Due Date when the request number is changed to the next request
- Zendesk 519313: “Recall/Renew” tab is not clearing notes field when the request number is changed to the next request
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- Zendesk 521696: Delivery Email application revised logic when resource_name is null to ensure routing to Delivery Failed is appropriate or not
- NCIP Place Hold application revised to ensure recording of the request fulfilment entry for the current supplier when unable to place a hold

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](https://help.oclc.org/Resource_Sharing/Relais_D2D/Release_notes_and_known_issues/2022_release_notes/100...)
- [Contact OCLC Support](https://help.oclc.org/Resource_Sharing/Relais_D2D/Release_notes_and_known_issues/2022_release_notes/100...)
- [OCLC Community Center](https://help.oclc.org/Resource_Sharing/Relais_D2D/Release_notes_and_known_issues/2022_release_notes/100...)
- [Browser compatibility chart](https://help.oclc.org/Resource_Sharing/Relais_D2D/Release_notes_and_known_issues/2022_release_notes/100...)