Introduction

Portal 3.3 includes several updates to the Relais patron, library, and staff portal pages and one new feature enhancement for the staff portal pages.

Patron/Library portal

- Ability to display copyright compliance options and acknowledgment statements specific to the genre of a request
- Modernized look and feel to the patron and library portal pages making the pages more user-friendly and accessible for users with disabilities.

Staff portal

- Ability to cancel a request using a button vs. only through a drop-down menu
- Ability to display copyright compliance options and acknowledgment statements specific to the genre of a request when placing a request on behalf of a patron and/or library
- Staff portal pages compliant with WCAG 2.1 Level AA

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.

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<th>ACTION</th>
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<td>Portal 3.3</td>
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ACTION

Determine if your institution requires a more granular display of copyright compliance options and/or acknowledgment statements based on the genre of a request (article, book, thesis). If so, submit a support ticket to ZenDesk to request these changes and specify to whom these changes apply (patron and/or library patrons).

Review the reasons that display for selection when the 'Cancel Request' button is selected when processing a request to ensure that all the reasons you would expect to display, display.

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 3.3

Patron / Library Portal

• Copyright compliance options and acknowledgment statements can now be configured to display genre-specific values. For example, in the patron portal pages, the Article Request form can show different options for both the copyright compliance options and acknowledgment statements versus those that appear in the Book Request form.

Article Request form:
Copyright Compliance:
(Non)

Messaging Method:
Mail

Messaging Address:

First Name:

Surname:

Address1:* 

Address2:

City:

Country:

State/Province:

Zip/Postal Code:

☐ * Acknowledgement of Mark's item care instructions during the pandemic

Book Request form:

Add Request
Article
Book ✔

Enter as much information as possible and click Submit.
All fields marked with an asterisk (*) are required.
Portal Compliance:
- Copyright cleared
- No copyright requirements
- Other

Messaging Method:
- Mail

Messaging Address:

First Name:
Surname:

Address1:
Address2:
City:
Country:
State/Province:
Zip/Postal Code:

* Please acknowledge that you accept the institution's condition for placing requests

- The look and feel of the patron and library portal pages have been updated to a more modern look and feel.

Portal 3.2 (prior to update)

Portal 3.3 (after update)
Staff Portal

- Staff members are now able to process requests as final cancellations using a button versus having to select a code from a combined dropdown list. The 'Unfilled' tab that appears when processing requests is renamed 'Unfilled / Cancel' in Portal 3.3. When selected, two options for marking a request unfilled will be presented; 'Unfilled and Cancel'. The default button is 'Unfilled'. If a request is processed as 'Unfilled', the request will be routed to the next supplier in the routing list.

If staff choose the 'Cancel' button, then the request will be processed as a final cancellation when updated.
• Copyright compliance options and acknowledgment statements can now be configured to display genre-specific values when staff members are placing requests on behalf of patrons and/or libraries from the staff portal.

**Patron Article request:**
Journal of medical toxicology - official journal of the American College of Medical Toxicology
Held by: VOILA

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 CONSORTIA.

Delivery/Messaging Details

Volumes needed

Notes

copyright compliance *

(Non) ▼

CCG

CCL

Copyright cleared

Messaging address

Delivery address *

Select a pickup location

Mark - Main Library ▼

Address1 *

Address2

City

Country

State/Province

Zip/Postal Code

☐ * Acknowledgement of item care instructions during the pandemic

☐ * Acknowledgement of physical return rules during pandemic

Patron Book request:

Printed: Fri, 23 Sep 2022 06:38:55 GMT
Bug fixes

There are no bug fixes to report at this time.

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](https://help.oclc.org/Resource_Sharing/Relais_ILL/Relais_ILL_release_notes_and_known_issues/2020_Relais_ILL...