WorldShare Circulation release notes for Tipasa libraries, June 2018

Last updated: Tue, 18 Sep 2018 13:26:54 GMT

Release Date: June 30, 2018

Browser support

This release was tested with the following browsers:

- Chrome (latest version)
- Firefox (latest version)
- Internet Explorer 11

Adobe Reader and JavaScript need to be enabled.

https://help.oclc.org/Librarian_Toolbox/Browser

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>
<thead>
<tr>
<th>ACTION</th>
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<tbody>
<tr>
<td>Tipasa and Circulation administrators should review policies and settings in Service Configuration related to integration.</td>
</tr>
<tr>
<td>Please review Set up integration for additional information.</td>
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<tr>
<td>If you have existing borrowing integration turned on and want to set up the new integration, contact Implementation for assistance.</td>
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</table>

New features and enhancements

Enhancements to borrowing workflow

You can now configure Tipasa-WorldShare Circulation integration to automatically update ILL requests in WorldShare Circulation at Shipped, Received, and Returned. This helps you better communicate with patrons and keep information consistent between Tipasa and WorldShare Circulation.

For complete details about the Tipasa and WorldShare Circulation integration, please see WorldShare Circulation Integration.

Integration for borrowers has been expanded to include:

- Automatic check-in when a loan request is updated to Returned status in Tipasa
- Assessment of patron bills when a copy or loan request is shipped by the lending library

For additional detail, please see Integration workflow, Borrowing workflow.

The following enhancements have been added:

- The creation of the temporary item and patron hold have been delayed until the request is updated to Received in Tipasa. This will limit the amount of clean up needed in Circulation for unfilled, expired, or cancelled requests.
- New configuration options allow your library to choose where temporary items are located. Use of the WS ILL branch is no longer required.
- You can automatically use the lending library’s item barcode for your temporary item (optional).
- Circulation now honors the Tipasa due date (with any patron offset) at check-out. The more restrictive of the Tipasa or Circulation policy dates will be used.
- Tipasa Request ID and/or lending library name displays in Circulation.

To learn more about configuring the integration, see Set up integration.
New lending workflow integration

You can now configure Tipasa-WorldShare Circulation integration to automatically update lending requests in WorldShare Circulation at Shipped and Completed.

For complete details about the Tipasa and WorldShare Circulation integration, please see WorldShare Circulation Integration.

Integration includes:

- Automatic check-out of the item from your local collection when responding Yes to a Tipasa loan request
  - Tipasa due date is always honored in Circulation.
- Automatic check-in of the item when the request is Checked-In/Complete in Tipasa
- Display of the Tipasa request ID and/or borrowing library name in Circulation

For additional detail, please see Integration workflow, Lending workflow.

To learn more about configuring the integration, please see Set up integration.

Known issues

No new issues were introduced in this release.

Support website(s)

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

- WorldShare Circulation support site
- OCLC Community Center
- Browser compatibility chart