Caution: Patron access to closed requests has changed

Changes installed with this release will affect how long your patrons have access to closed requests in the patron portal. Previously, patrons had access to their closed requests for 5 years (up to 500 requests). Now, this length of time will be determined by the new patron data retention period that you specify in Service Configuration for your institution. The default has been set to 1 month for all libraries.

_required action: Prior to September 17, 2018, set the retention period for your library in Service Configuration._ If you do not increase the system default of 1 month, patron data will be purged from a request once it has been closed for 30 days and the request will no longer be accessible in the patron interface. We recommend that you increase the retention period to meet the needs of your library or to match your institution’s patron data policies.

This new patron data retention setting allows ILL staff to retrieve closed requests by searching on Patron Name or Patron ID. For more information, see Retain patron data on closed requests.

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. This checklist identifies 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 items that might require additional action or follow up by your institution.

These items require immediate action or decisions.
Following the release, we recommend that you clear your browser's cache before starting to work with Tipasa.

If the link to your library’s catalog has not been set up, or if the link needs to be updated, follow the instructions for Search my library's online catalog. When you have enabled your online catalog links, you can search your catalog for requested items as a borrower or lender.

https://help.oclc.org/Resource_Sharing/Tipasa/Reference/Search_my_library's_online_catalog

Libraries with WorldShare Management Services (WMS) should enable OPAC Integration.

https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/100Advanced_Workflows#Opac_Integration

Have you updated addresses in each of your borrower and lender Constant Data records? If not, please do so on behalf of all your borrowing and lending partners. Address labels do not print properly unless the addresses are formatted correctly.

Have there been any changes in your contact information or lending policies? If so, please make the appropriate updates in Policies Directory.

Share release notes with your colleagues.


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**New features and enhancements**

This release provides the ability to retain and search patron data on closed requests, as well as deliver larger files via Article Exchange. Libraries in the U.K., Australia, and New Zealand are now able to track patron copyright acknowledgement, and libraries in New Zealand can now conduct IFM transactions in the New Zealand Dollar.

**Retain patron data on closed requests**

Caution: See note above about Patron access to closed requests has changed.

Your library can optionally retain patron data on closed requests:

- Specify in Service Configuration the amount of time (up to 60 months) to retain patron data after a request is closed

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https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2018_Release_notes/080Tipas...
Search for closed requests by Patron Name, Patron ID, or Patron Department

Note: Patron Name and Patron ID will not be available in OCLC Usage Statistics. Patron Status and Patron Department continue to be included.

Note: Patron data is not currently encrypted in the database. This enhancement is planned by the end of 2018.

**Deliver Article Exchange files up to 120 MB**

The maximum file size for Article Exchange has been increased from 60 MB to 120 MB.

For more information on Article Exchange features, see [Article Exchange](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2018_Release_notes/080Tipasa...).

**Support copyright laws in the U.K., Australia, and New Zealand**

Libraries in these countries can now track patron acceptance of local copyright terms:

- Set up patron request forms to include copyright compliance statement and acceptance
- Select your library's default copyright compliance statement to be applied with borrower constant data records
- Confirm and track patron acceptance

Note: For libraries outside of these countries, there is no change in processing lending requests. However, when a library in the U.K., Australia, or New Zealand requests a copy from a lending library in the U.S., for example, the U.S. lender will not see any indication of United States’ CCG (Compliance CONTU Guidelines) or CCL (Compliance Copyright Law). Instead, the lender will see an acknowledgement of their non-U.S. copyright compliance.

Example from an Australian library request as seen by a U.S. lending library:

<table>
<thead>
<tr>
<th>Electronic Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copyright Compliance</td>
</tr>
</tbody>
</table>

For additional detail, see [Borrowing Library Information fields, Copyright Compliance](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2018_Release_notes/080Tipasa...).
View local holdings and availability for patron-initiated requests (for WMS libraries)

For libraries with WorldShare Management Services (WMS), local holdings and availability information can be automatically retrieved for patron-initiated borrowing and document delivery requests to reduce clicks and save you time. The local holdings information will also be saved with the request for inclusion on pull slips and book straps to assist with pulling items for scanning and shipping.

To turn on OPAC Integration in Service Configuration, go to the WorldShare ILL settings for Advanced Workflows:

For additional detail, see:

- Advanced Workflows - OPAC Integration
- Process requests - View local holdings and availability
- Create and process Document Delivery requests - View local holdings and availability

Note: Automation for lending requests is not yet available but is being scheduled for a future release.

Bug fixes and known issues

Lists of current known issues and recently fixed issues can be found at:

https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/Known_issues

Future releases

The following enhancements are targeted for upcoming releases:

- Printing of book stickers for borrowing and document delivery requests
- Auto-population of local holdings and availability information for lending requests (pilot test)
- Ability to delete patron records in bulk

Roadmap information is available in the Tipasa Community.

Important links

Product web site

More product information can be found at http://www.oclc.org/en/tipasa.html
Support website(s)

Support information for Tipasa is available here:

- Training: https://help.oclc.org/Resource_Sharing/Tipasa/Training
- Documentation: https://help.oclc.org/Resource_Sharing/Tipasa
- OCLC Support: https://www.oclc.org/support/contact-support.en.html

When calling OCLC Customer Support (U.S.), press option 7 to be directed to a Tipasa Tier 1 Support Specialist.

OCLC Community Center

At the OCLC Community Center, you can:

- Connect with community peers
- Collaborate, ask questions and gain insights
- Contribute and share ideas to improve products
- Stay on top of and discuss OCLC announcements

http://www.oclc.org/community/