Tipasa release notes, February 2019

Release Date: February 24, 2019

Introduction

This release of Tipasa provides several new features and enhancements to help you manage more complex workflows, including:

• Deliver articles from Reprints Desk to your patrons via Article Exchange
• Resend unfilled requests
• Use branches defined in WorldCat Registry as pickup locations
• Save time and improve patron experience with circulation integration (for Alma libraries)

Many of these enhancements are the direct result of your feedback.

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>
</tr>
</thead>
<tbody>
<tr>
<td>We recommend that you clear your browser’s cache before starting to work with Tipasa.</td>
</tr>
<tr>
<td>If this link to your library’s catalog has not been set up:</td>
</tr>
<tr>
<td>Search my library’s online catalog</td>
</tr>
<tr>
<td>Or if the link needs to be updated, follow the instructions below. When you have enabled your online catalog links, you can quickly search your catalog for requested items as a borrower or lender.</td>
</tr>
</tbody>
</table>
If your library uses WorldShare Management Services (WMS), we encourage you to enable integrations with WorldShare Circulation and WorldShare Acquisitions.

https://help.oclc.org/Resource_Sharing/Tipasa/WorldShare_Circulation_Integration
https://help.oclc.org/Resource_Sharing/Tipasa/WorldShare_Acquisitions_integration

Note: OPAC integration has been turned on for all WMS libraries.

If your library uses Alma, we encourage you to enable OPAC integration for automatic retrieval of local holdings and availability information and circulation integration for automatic creation of temporary items and automated checkout/check-in. Please contact OCLC Support to request these be enabled.

Have you updated addresses within each of your borrower and lender Constant Data records in OCLC Service Configuration? 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 OCLC Policies Directory.

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.
https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2019_release_notes/100Tipas...

Gather your team for the upcoming webinar Product Insights: Resource Sharing.

Date: Wednesday, April 17, 2019, 2:00pm, Eastern Daylight Time (New York, GMT-05:00)
New features and enhancements

Deliver articles from Reprints Desk to your patrons via Article Exchange

You can now use Article Galaxy powered by Reprints Desk to quickly and easily purchase and deliver articles to your patrons via Article Exchange.

To set up this option, first submit the form available [here](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2019_release_notes/100Tipasa) to get an Article Galaxy account unique to Tipasa. Then, in Service Configuration under Purchase Options, enter your new ID and password as well as an email address for receiving notifications. You can choose whether documents are received and delivered automatically or manually by ILL staff.

For articles available from Reprints Desk, an Article Galaxy link will be included on the Purchase tab. When you choose Article Galaxy, you have the option to add a note before placing the request.

It takes just a few moments for the request to be processed by Reprints Desk. The article is delivered in the patron portal.
The closed request includes the order number...

![Source]

- **Source**: PATRON
- **Status**: Closed (Supplied)
- **Fulfillment Type**: Purchase
- **Ordered Date**: 02/05/2019
- **Vendor Name**: Reprints Desk
- **Order Number**: 5779156
- **Price**: $33.00

...as well as supplier and event history.

![Supplier History]

For more information, see Article Galaxy from Reprints Desk.

**Resend unfilled requests**

A new Resend Request option is now available for resubmitting requests that were not filled with the initial lender string. You also have the option of changing the fulfillment type to a purchase, for example.
In an unfilled request, a new section lets you see previously tried lenders, view holdings, and build a new lender string. You can also edit fields like Need Before Date, Borrowing Notes, and Max Cost amount and currency before resending the request.
Once the request is resent and awaiting response, it’s much like any other borrowing request. The patron sees a status of Submitted, and you can view which lender currently has the request.

If you wish to change bibliographic data for the request, you should use the New option that was previously available, rather than this new Resend Request option. Please also note that using Resend Request will affect statistics, since the request will be active longer before it is filled or exhausted.

For more information, see Unfilled requests.

Use branches defined in WorldCat Registry as pickup locations

You now have a new option for defining ILL pickup locations on the patron request form. This may be particularly useful for libraries using WorldShare Management Services (WMS).

Previously, ILL pickup locations could only be entered in Service Configuration as free text. New options added with this release allow you to specify ILL pickup locations as free text, WorldCat Registry locations, or both.
The ability to use WorldCat Registry locations as ILL pickup locations is foundational for future branch workflow and distance education features. A benefit today for WMS libraries is that, if a location name is changed in the registry, the change is automatically reflected in the pickup location drop-down menu in the patron portal.

For more information, see Configure pickup location.

Save time and improve patron experience with circulation integration (for Alma libraries)

Libraries using Tipasa and Alma will soon be able to take advantage of ILL-circulation integration for physical items. The integration is currently being piloted with five libraries, and once the pilot integrations and documentation are completed, we will reach out to all Tipasa libraries using Alma.

If you are interested in setting up the ILL-circulation integration as soon as the pilot period ends, please let us know by contacting OCLC Support.

Like WMS, five integrations based on NCIP protocol are supported for Alma.

<table>
<thead>
<tr>
<th>Workflow</th>
<th>NCIP message</th>
<th>Action in Tipasa</th>
<th>Automatic action in circulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing</td>
<td>Accept Item</td>
<td>Borrower marks item as Received</td>
<td>Temp item created and hold placed for</td>
</tr>
</tbody>
</table>
### Circulation

**Server Details**
- Enable Circulation integration: On
- Select your ILS
- Alma Server Address
- Alma Institution Code

**Borrowing**
- Create circulation item record on received: On
- Use supplier’s shipped item barcode: On
- Use request ID as item barcode: On
- Check in item on returned: On
- Charge patron on shipped: On

**Lending**
- Check out item on shipped: On
- Check in item on check in: On

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Before turning on the integrations, you may need to consult Ex Libris or make adjustments to your Alma or Tipasa configurations. Then, the integrations can be easily turned on within Service Configuration.

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<table>
<thead>
<tr>
<th>Borrowing</th>
<th>Checkin Item</th>
<th>Borrower marks item as Returned</th>
<th>Item checked in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing</td>
<td>Create User Fiscal Transaction</td>
<td>Lender marks item as Shipped</td>
<td>Fee charged to patron (This must be a rule-based fee, for example, charging a flat fee for all ILL requests.)</td>
</tr>
<tr>
<td>Lending</td>
<td>Checkout Item</td>
<td>Lender marks item as Shipped</td>
<td>Item checked out</td>
</tr>
<tr>
<td>Lending</td>
<td>Checkin Item</td>
<td>Lender marks item as Complete</td>
<td>Item checked in</td>
</tr>
</tbody>
</table>
Bug fixes

The following bug fixes were included in this release:

• Article Exchange links are now retained in borrowing requests. Previously, there were some instances where the link was not retained.
• Lenders no longer see borrower to patron notifications in the notification log.
• Open Access links are now showing in the request in the staff interface.
• The Staff ILL Request button in WorldCat Discovery now opens the request in the Staff interface. Previously, the Staff ILL Request button opened a blank page.
• After taking an action that moves a request to a different queue, it is once again possible to use next/previous links to view other requests in the original queue.
• Deflection policies based on E-License terms are now deflecting requests for e-books.
• Request screen no longer jumps to the previously open accordion.
• Language and Publication Date will be included in interlibrary loan statistics going forward. Previously, these were missing from interlibrary loan statistics.

Current and fixed issues can be found at:

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

Known issues

Current known 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:

• Additional branch workflow enhancements
• Optional email alert when an Article Exchange link needs to be sent to the patron

Roadmap information is available in the OCLC Community Center.

Important links

Post-release session

To help you become familiar with the new features, enhancements, and improvements included in this release, please attend the upcoming webinar Product Insights: Resource Sharing.
Date: Wednesday, April 17, 2019, 2:00pm, Eastern Daylight Time (New York, GMT-05:00)


Please note the session time zones when registering. The sessions will be recorded and archived for future viewing on the OCLC Community Center. Please register, even if you are unable to attend, to receive a link to the recorded session.

Support websites

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

- Tipasa product website
- OCLC Community Center
- OCLC Support: When calling OCLC Customer Support (U.S.), press option 7 to be directed to a Tipasa Tier 1 Support Specialist.
- Browser compatibility chart