Tipasa release notes, April 2019

Release Date: April 28, 2019

Introduction

This release of Tipasa provides several enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- Use improved Patron Summary popup
- View local holdings and availability (for Sierra libraries)
- Use Request ID as temporary item barcode (for WMS libraries)
- Receive email alert when request filled via Article Exchange

Additional enhancements for this release are included below. Many of the 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.

We recommend that you clear your browser's cache before starting to work with Tipasa.

If this link to your library's catalog has not been set up:

Search my library's online catalog

Or if the link needs to be updated, follow the instructions below. When you have enabled your online catalog links,
ACTION

you can quickly 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

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.

https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests#View_local_holdings_and_availability
https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/Tipasa_Non-WMS_Circulation_Integration

If your library uses Sierra, we encourage you to enable OPAC integration for automatic retrieval of local holdings and availability information. Please contact OCLC Support to request these be enabled.

https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests#View_local_holdings_and_availability

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/d_known_issues

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**

**Save WorldCat Registry branch as pickup location**

In the February release, functionality was added to allow you to use branches defined in WorldCat Registry as pickup locations.

With this release, these WorldCat Registry defined branches can be included in the pickup location drop-down menu on the patron request form. The WorldCat Registry defined branches are also available for selection and editing within the Tipasa staff interface.

For more information, see Configure pickup location.

**Use improved Patron Summary popup**

The following additional fields will now be included in the patron popup:

- City
- State Initials
- Post Code
- Phone Number
- Email address
More easily enter Staff Note

When you click the "Note" button, the cursor will now automatically be placed in the text entry box. You'll no longer need to click inside the box before starting to type your note.

For more information, see Staff Notes.
View local holdings and availability (for Sierra libraries)

OPAC integration for borrowing and lending requests is now available for Sierra libraries with a Z39.50 server that we can connect to for lookups. Please contact OCLC Support to request enabling of OPAC integration.

Once enabled, this integration lets you easily:

• Identify when your library holds the requested item
• Include local shelving information on printouts
• Include local shelving information in notifications

Note for WMS libraries: OPAC integration has been enabled in Service Configuration.

Note for Alma libraries: Please contact OCLC Support to request enabling of OPAC integration.

For more information, see View local holdings and availability.

Use the Request ID as temporary barcode (for WMS libraries)

Libraries who use WorldShare Management Services and have turned on Tipasa WMS integration can now choose to use the Request ID as the default temporary barcode. This ensures a unique barcode for each request and provides additional searchability between the two systems.

Tipasa® WMS Integration

<table>
<thead>
<tr>
<th>Acquisitions</th>
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</thead>
<tbody>
<tr>
<td>Enable WMS Acquisitions integration</td>
</tr>
<tr>
<td>Note: This feature will allow you to transfer a purchase request from Tipasa into Acquisitions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Circulation</th>
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<tbody>
<tr>
<td>Enable WMS Circulation integration</td>
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<table>
<thead>
<tr>
<th>Borrowing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create circulation item record on received</td>
</tr>
<tr>
<td>Use supplier’s shipped item barcode</td>
</tr>
<tr>
<td>Use request ID as item barcode</td>
</tr>
<tr>
<td>Check in item on returned</td>
</tr>
<tr>
<td>Charge patron on shipped</td>
</tr>
</tbody>
</table>

For more information, see Tipasa WMS Integration.
Receive an email alert when a request is filled via Article Exchange

You can now opt to receive an email alert when a request that has an Article Exchange link arrives in the In Transit queue. This alerts you that an Article Exchange link needs to be sent to the patron and may be particularly useful for infrequent borrowers. These alerts can be set up in Service Configuration within the Interlibrary Loan Options.

For more information, see Article Exchange Email Notification.

User portal display improvements for Recall and Overdue statuses

Recalled and overdue items are highlighted in the user portal interface to better alert patrons that the item needs to be returned.
Bug fixes

• The following bugs related to the resubmitting requests have been resolved:
  ◦ Resubmitting to previously tried lenders no longer results in duplicate queue entries.
  ◦ Resubmitting to the last lender in the previous string no longer causes the request to go immediately back to unfilled.
  ◦ Libraries can now resubmit when a previous lender is set to a non-supplier.

• A change was made to resolve the error message ‘There was a problem while checking availability’ that was intermittently displaying for some libraries using Reprints Desk. If you encounter any other error messages with the Reprints Desk functionality please report them to Customer support at 1-800-848-5800.

• Following the release, Australian and Canadian libraries will see the appropriate provinces and territories. Prior to this release, Australian and Canadian libraries saw US states in the province field of the request in the staff interface.

• Patrons will be able to see the subject line of any custom notifications sent to them in the Notifications section of the user portal.

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:

• Use WorldShare Report Designer for ILL statistics
• Receive alert when borrowing request reaches end of lender string
• Use book straps/stickers for both pull slip and shipping
• Use RapidILL only for lending or only for borrowing
• Submit RapidILL requests even when holdings check shows your library holds the item
• Branch workflows
  ◦ Select the holding branch email address from an address book
  ◦ Request item retrieval by email
• A Clone feature will be available in the user portal allowing patrons to clone an existing request and edit as needed in order to re-request the same or similar item
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