Introduction

This release of Tipasa provides a number of new features and enhancements. These features will help you manage more complex workflows, including:

- Better control processing of requests by specifying the order for applying Direct Request profiles
- Edit bibliographic fields when resending an unfilled request
- Provide an improved experience for patrons

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.

ACTION

*It's very important to clear your browser's cache before starting to work with Tipasa!*

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

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.

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 Ex Libris 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 Innovative's 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.
Gather your team for the upcoming webinar Product Insights: Resource Sharing.

Date: Wednesday, October 23, 2019, 2:00pm, Eastern Daylight Time (New York, GMT-05:00)
Registration: https://www.oclc.org/community/ill_prime/events/oct19.en.html

Have you signed up for email alerts for News in the Community Center? This will ensure that Tipasa release notes and events come straight to your inbox.

Have you familiarized yourself with the new reporting capabilities for Tipasa in WorldShare Report Designer?

An overview recording is available in the OCLC Community Center:

https://www.oclc.org/community/ill_prime/events/analytics.en.html

Include Request ID with problem reports

When reporting an issue with Tipasa, it’s very helpful to include the Request ID. Including this information allows us to directly trace what happened on the request we are troubleshooting.

New features and enhancements

Better control processing of requests by specifying the order for applying Direct Request profiles

You can now have more control of and visibility into the Direct Request process by specifying the order in which Direct Request profiles are applied.
Direct Request

Required fields are marked with an asterisk *

Direct Request Profiles

<table>
<thead>
<tr>
<th>Profile</th>
<th>COPIES (10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Name:</td>
<td></td>
</tr>
<tr>
<td>*Profile Priority:</td>
<td>1</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
</tr>
</tbody>
</table>

Requests may match multiple profiles. Among matched profiles, the one with the highest priority (lower number) will be the "best" match.

The request is compared against all Direct Request profiles, and the matching profiles are ordered based on the user-set priority. The profile with the lowest numbered priority is applied to the request. The priority can be set for each Direct Request profile in Service Configuration > WorldShare ILL > Direct Request Profiles.

For more information, see Automated Request Manager (formerly Direct Request).

Edit bibliographic fields when resending an unfilled request

You can now edit bibliographic fields when resubmitting an unfilled request. This will allow you to alter bibliographic data for the request before resubmitting. The request type can also be changed from Copy to Loan, or vice-versa.

As with new requests, search options now appear on Title, Author, ISSN, ISBN, and OCLC Number. Fields that were not populated in the original request are displayed and can be edited or populated before resubmitting. The only bibliographic field that can't be edited is the preferred edition field.
**165747373: Lily’s purple plastic purse**

**Resend Request** | Change Fulfillment Type | Cancel Request

<table>
<thead>
<tr>
<th><strong>Request</strong></th>
<th><strong>Purchase</strong></th>
<th><strong>Staff Notes</strong></th>
</tr>
</thead>
</table>

**Patron Summary**

- **Source**: WSLL
- **Status**: Unfilled
- **Title / Journal**: Lily’s purple plastic purse
- **Uniform Title**: 
- **Author**: Henkes, Kevin
- **Publisher**: New York : Greenwillow Books, 1996.
- **ISBN**: 0780688128075 1591123488 0781591123484 068812888X 978068812
- **ISSN**: 
- **OCLC**: 33013634
- **DOI**: 
- **PMID**: 
- **Dissertation**: 
- **Series**: Lily;
- **Request Tags**: Choose...

**Type**

- **Format**: Loan
- **Language**: English (eng)
- **Edition**: First edition
- **Preferred edition**: Any edition
- **Article Title**: 
- **Article Author**: 
- **Volume**: 
- **Issue/No**: 
- **Issue Date**: 
- **Pages**: 
- **Requested on**: 10/07/2019
- **Need Before**: 10/31/2019

**View Holdings**

For more information, see Unfilled Requests.

Provide an improved experience for patrons

Better manage your limit on patron requests because returned and lost items are no longer counted

Requests in Returned, Returned_Missing, and Shipped_missing status are no longer counted as active requests. Now, any requests the patron sees in the User Portal with a status of Complete do not count against their request limits.

No configuration changes are needed for this functionality. The change applies to all requests currently in process, and each patron's current number of active requests have been adjusted accordingly.

For more information, see Patron Settings.

Pre-populate Patron Type from patron record, so patron does not have to specify this with each request

You can now have the Patron Type from the patron record auto-populate in the patron request workforms. This field will be populated from the patron record under Interlibrary Loan > Patron Type. It corresponds with the illPatronType from patron loads.
For this field to auto-populate, the Status field must be added to the Patron section of the patron request workforms, with values added that match the Patron Types used in your patron records.
The value from the patron record for illPatronType will pre-populate request forms in the User Portal if a match is found. If there is no matching value between the patron record and the Status field values in the patron request forms, the default value will be used. The matching is not case sensitive.

For libraries using WorldShare Circulation, the illPatronType will still be used (as opposed to the borrowerCategory/Circulation Patron type).

As a reminder, libraries should supply values in illPatronType that are meaningful for ILL statistics. The illPatronType gets passed to the Staff interface and is also used for ILL Statistics.

For more information, see Patron Request Workform configuration.
Pre-fill bibliographic data more accurately

Pre-populating of patron request workforms using OpenURL is now improved. Publisher information will now display correctly. Prior to this release, publisher information that was present in the MARC record 264 field was not passed correctly into the Tipasa forms.

Also, the Journal Title element (jtitle) when present on a chapter citation will now pass correctly for article/chapter requests. Prior to this release, the jtitle would remain blank on the Tipasa forms.

For more information, see Configure Custom OpenURL Links.

Optionally hide due date in user portal to prevent inconsistency with circulation system

You now have the choice to hide the patron due date in the user portal. Libraries that have a policy of setting their own due date may find it useful to suppress the lender's due date from the user portal.

By default, display of the patron due date set to On and the patron can see the due date in the Status column.

To hide the patron due date in the user portal, go to Service Configuration > WorldShare ILL > Patron Settings and deselect the option.
The due date and associated overdue warnings will no longer be displayed in the Status column.

For more information, see [Patron Settings](#).

**Bug fixes**

No bug fixes were included with this release.
Known issues

For a list of current and recently fixed issues, see Known issues.

Future releases

Roadmap information is available in the OCLC Community Center.

Important links

Product Insights: Resource Sharing

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, October 23, 2019, 2:00pm, Eastern Daylight Time (New York, GMT-05:00)
Registration: https://www.oclc.org/community/ill_prime/events/oct19.en.html

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