Tipasa Release Notes, December 2019

Release Date: December 15, 2019

Introduction

This release of Tipasa provides enhancements as well as numerous bug fixes, which will help you manage more complex workflows, including:

- Use new patron data reports to help manage your patron database
- Include additional copyright fields in the borrowing Tipasa export
- Resubmit requests as expected without intermittent errors
- Populate phone and email addresses when the constant data record is applied by Direct Request

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>It's very important to clear your browser's cache before starting to work with Tipasa!</td>
</tr>
</tbody>
</table>

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

- [Search my library’s online catalog](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2019_release_notes/075Tipasa...)

Printed: Mon, 23 Mar 2020 15:38:51 GMT
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.
Share these release notes with your colleagues.

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

Date: Wednesday, January 22, 2020, 2:00pm, Eastern Standard Time (New York, GMT-05:00)

Have you signed up for [email alerts](https://www.oclc.org/community/ill_prime/events/jan2020.en.html) 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](https://www.oclc.org/community/ill_prime/events/analytics.en.html) 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](https://www.oclc.org/community/ill_prime/events/analytics.en.html)

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**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**
Use new patron data reports to help manage your patron database

You now have access to three new standard patron reports, including a report to show your number of patrons by branch, zip code, and patron custom categories. You also now have access to the Circulation Patron Information data universe. By using this data universe and WorldShare Report Designer, you’ll be able to create lists of patrons by patron type, see who is actively blocked, prepare for bulk delete of patron records, and more.

For more details, see WorldShare Report Designer for Tipasa.

Include additional copyright fields in borrowing Tipasa export

The Copyright Compliance and Copyright Signature fields will now appear in the borrowing version of the exported .csv file. This may be helpful for libraries using non-US Copyright management that need to keep records regarding copyright types and patron copyright acknowledgement.

The new fields will look similar to this in the export:

<table>
<thead>
<tr>
<th>COPYRIGHT</th>
<th>PATRONCOPYRIGHTACKNOWLEDGED</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUS_S_49</td>
<td>NOT_ACKNOWLEDGED</td>
</tr>
<tr>
<td>AUS_S_49</td>
<td>ACKNOWLEDGED</td>
</tr>
<tr>
<td>AUS_S_49</td>
<td>NOT_APPLICABLE</td>
</tr>
</tbody>
</table>

For more information, see Export a queue or search results.

Bug fixes

- You can now resubmit all eligible requests without issue. Prior to the release, you may have received an error in some instances and been unable to resubmit the request.
- Phone and email addresses from the constant data record are now populated in the request when the constant data record is applied by Direct Request. Previously, if Direct Request applied a constant data record the phone and email address fields from the constant data record were not applied.
- Article Exchange will now send all valid files that are uploaded. Previously, you may have gotten an intermittent
Invalid Request Type error message when uploading files.

• Patrons can now access Article Exchange documents as expected. Prior to this release, patrons reported getting an error message in some cases when trying to access the uploaded document.

• You can now create new Document Delivery requests from the Tipasa home page by going to the Document Delivery queue and clicking Create Request. Previously, this workflow resulted in an error message.

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.

Coming Soon

• Use APIs to read full details of a request or search/return brief records
• Use the Automated Request Manager to:
  ◦ Use the pickup location and patron note as Direct Request matching criteria
  ◦ Auto-tag lending requests with holding location
• Deliver Get It Now articles via Article Exchange
• View tags in more queues

Important links

Product Insights: Resource Sharing

To help you become familiar with the enhancement and fixes included in this release, please attend the upcoming webinar Product Insights: Resource Sharing.

Date: Wednesday, January 22, 2020, 2:00pm, Eastern Standard Time (New York, GMT-05:00)
Registration: https://www.oclc.org/community/ill_prime/events/jan2020.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 website(s)

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**