Tipasa Release Notes, April 2020

Release Date: April 19, 2020

Introduction

This release of Tipasa includes a number of new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

• Have 180 days to process new requests, allowing you more processing time if needed
• Avoid automatic application of Constant Data when requests move to Review, so information isn’t overwritten when you don’t want it to be
• View tags in all queues

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>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:

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 your contact information or lending policies changed? 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.

During the COVID-19 crisis, review the information summarized in this News post:

- Managing your library’s ILL services during the COVID-19 crisis (Recording - 90 min, slides, notes for slides 70-81)
- Reason for No (RFN) = Preferred Delivery Time Not Possible (News post)
- Profiled Groups ACOV and BCOV and Days-To-Respond indicators (Video tutorial - 40 min, slides; office hour, slides)
- ILL professional development: Recorded webinars and on-demand training (News post)
- COVID-19 and OCLC Services Service Configuration cheat sheet

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

Date: Wednesday, April 22, 2020, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)
Registration: https://www.oclc.org/community/ill_prime/events/april2020.en.html

Attend the Workshop Series: Learn how to fine-tune your ILL setup to save you time and speed turnaround for your library’s users. Topics include:

- Fine-tune your Policies and Deflections - view recording
- Construct your Custom Holdings - view recording
- Automate your request process - coming May 5 (register here)
- Curate and care for your Constant Data - coming in June
- Make your usage statistics count - coming in July

Have you signed up for email alerts for News in the Community Center? This ensures 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

Have 180 days to process new requests

Previously, requests in the New For Review queue (and Not Reviewed and Reviewed sub-queues) were automatically closed ("aged out") after 14 days. Starting April 19, 2020, requests will remain in the New for Review queue for 180 days, so you will have more time to process them at a later date if needed.

This change applies to all requests in New For Review queues and sub-queues on April 19, 2020 and all future requests. It will also prevent patrons from receiving notifications that their requests were closed and seeing the status of Closed in the user portal.
Avoid automatic application of Constant Data when requests move to Review

Previously, the system would frequently apply default Constant Data when requests were moved to Review. This was not ideal for several reasons and perhaps most notably when the patron-supplied need by date was overwritten when you were not wanting it to be.

With this release, default Constant Data will no longer be applied automatically when requests are moved to Review by the system. The new Automated Request Manager released in March 2020 does not require a Constant Data record to be specified for an automation and Constant Data is only applied when either:

- An automation has an action that applies a Constant Data record
- You have Constant Data persistence turned on, so Constant Data is applied when the request is first opened

For more information, see Automated Request Manager.

View tags in all queues

With the August 2019 release, tags were added to the borrower renewal queues. Tags now display in all Borrowing, Lending, Purchase, and Document Delivery queues, so you can more easily see when requests may need special attention or processing.
With the June 2020 release, the Automated Request Manager will be enhanced to let you auto-tag new borrowing requests, so this enhancement lays the foundation for you to easily see automatically applied tags in all queues.

For more information, see Tags.

Deliver Get It Now articles via Article Exchange

If your library uses Get It Now, you'll soon be able to deliver Get It Now articles via Article Exchange. This functionality will be in a separate release later in April 2020. Please watch for an announcement in the OCLC Community Center when this option becomes available.

For more information, see Get It Now and Article Exchange.

Note
References to Direct Request removed

Now that Automated Request Manager has replaced Direct Request, wording in the Tipasa staff interface and OCLC Service Configuration has been updated.

Tipasa staff interface

<table>
<thead>
<tr>
<th>LOCATION</th>
<th>PREVIOUS WORDING</th>
<th>UPDATED WORDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing Requests &gt; Request History</td>
<td>Direct Request History</td>
<td>Automation History</td>
</tr>
<tr>
<td>Borrowing Requests &gt; Direct Request History</td>
<td>No profiles exist.</td>
<td>No automations exist.</td>
</tr>
<tr>
<td>All Borrowing Requests &gt; New For Review</td>
<td>Send Request &gt; Send to Direct Request</td>
<td>Send Request &gt; Send to Automation</td>
</tr>
<tr>
<td>Direct Produced (Queue Name)</td>
<td>Direct Produced</td>
<td>Automation Produced</td>
</tr>
</tbody>
</table>

OCLC Service Configuration

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<tbody>
<tr>
<td>WorldShare ILL &gt; Direct Request Profiles</td>
<td>Direct Request Profiles tab</td>
<td>The Direct Request Profiles tab has been removed</td>
</tr>
<tr>
<td>WorldShare ILL &gt; Advanced Workflows &gt; Document Delivery</td>
<td>Please modify a Direct Request profile to route through Document Delivery.</td>
<td>Note: Please modify or create an automation to route through Document Delivery</td>
</tr>
</tbody>
</table>
Bug fixes and known issues

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

Future releases

The following enhancements are targeted for upcoming releases:

• Auto-tag new borrowing requests (e.g., Rush, Patron Note)
• View tags in search results
• Get complete publisher information for bib records cataloged in RDA format
• Provide patrons with unified view of circulation and ILL requests (for WMS libraries)

Roadmap information is available in the OCLC Community Center.

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, April 22, 2020, 2:00pm, Eastern Daylight Time (New York, UTC-04:00)
Registration: https://www.oclc.org/community/ill_prime/events/april2020.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.

**Workshop Series on Policies and Configurations**

Join us for the Workshop Series: Learn how to fine-tune your ILL setup to save you time and speed turnaround for your library's users. Topics include:

- Fine-tune your Policies and Deflections - view recording
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- Automate your request process - coming May 5 (register here)
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**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