Release Date: June 21, 2020

Introduction

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

- Automatically tag new borrowing requests that require special processing
- More quickly find lenders and e-resources by viewing knowledge base details on the Holdings page

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

For the June 2020 release notes for the new My Account experience for library users, see Tipasa release notes for My Account, June 2020.

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>
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</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 your library uses WorldShare Management Services (WMS), we encourage you to verify that your integrations with WorldShare Circulation and WorldShare Acquisitions are set up to best meet your needs.
Note: Local holdings and availability (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.

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.

For all other library systems, 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, you can quickly search your catalog for requested items as a borrower or lender.

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

See also the News posts about crowd sourcing the safe return of ILL physical items and the ILL community-sourced map.

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

Date: Wednesday, July 15, 2020, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)
Registration: https://www.oclc.org/community/ill_prime/events/July2020.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 - view recording
- Curate and care for your Constant Data - coming June 23 (register here)
- Make your usage statistics count - coming in July/August

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](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

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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.

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**New features and enhancements**

**Automatically tag new borrowing requests that require special processing**

Now you can add request tag(s) to main automations so that tags can be automatically applied to borrowing requests that match specific criteria. This allows for greater automation and streamlined workflows. This can be configured in Service Configuration > WorldShare ILL > Automated Request Manager:
Main Automations
Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

<table>
<thead>
<tr>
<th>Name</th>
<th>Matches</th>
<th>Actions</th>
<th>Priority</th>
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</thead>
<tbody>
<tr>
<td>*RUSHCOPY</td>
<td>Need at Earliest: 1 but no later than 3 days</td>
<td>Route Request to Review</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Build Lender String</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Apply Constant Data</td>
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<tr>
<td></td>
<td></td>
<td>Add Request Tags: * 📚 *</td>
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<tr>
<td>Exceptions</td>
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<tr>
<td></td>
<td>If Held By My Institution, Route to Document</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If Duplicate Request, Route to Review</td>
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</table>

For more information, see Automated Request Manager.

More quickly find lenders and e-resources by viewing knowledge base details on the Holdings page

You can now view holdings from the WorldCat knowledge base on the Holdings page:

In addition, the knowledge base holdings information will appear in the holdings detail pop-up when the blue hyperlink in the Holdings column is clicked:
Deliver articles with additional fulfillment types, reducing upload errors

You can now use Article Exchange for the following fulfillment types:

- ISO-ILL
- Provider

This is in addition to the fulfillment types that already had Article Exchange capabilities:

- OCLC ILL
- Document Delivery
- Purchase

This change should reduce the number of errors you receive when using Article Exchange.

For more information, see Article Exchange.

Bug fixes and 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 enhancements and fixes included in this release, please attend the upcoming webinar Product Insights: Resource Sharing.

Date: Wednesday, July 15, 2020, 2:00pm, Eastern Daylight Time (New York, UTC-04:00)
Registration: https://www.oclc.org/community/ill_prime/events/July2020.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
- Construct your Custom Holdings - view recording
- Automate your request process - view recording
- Curate and care for your Constant Data - coming June 23 (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