Tipasa Release Notes, August 2020

Release Date: August 16, 2020

Introduction

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

- Process requests more quickly using real-time availability and the new auto-no feature (for libraries that subscribe to WorldCat Discovery with availability)
- Get more time to process requests in problem statuses
- More easily find lenders now filling requests for physical materials by using the new CCOV profiled group

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>
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<tr>
<th>ACTION</th>
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<tr>
<td>It’s very important to clear your browser’s cache before starting to work with Tipasa!</td>
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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.

https://help.oclc.org/Resource_Sharing/Tipasa/WorldShare_Circulation_Integration
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 [new profiled group](#) CCOV.

Gather your team for the upcoming webinar [Product Insights: Resource Sharing](#).

Date: Wednesday, October 15, 2020, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)
Registration: [https://www.oclc.org/community/ill_prime/events/pi-october-2020.en.html](https://www.oclc.org/community/ill_prime/events/pi-october-2020.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 - [view recording](#)
- Make your usage statistics count - coming in October

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.

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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

Process requests more quickly using real-time availability and the new auto-no feature

If your library subscribes to WorldCat Discovery with availability, you'll no longer see lending requests for items that aren't available. Based on real-time availability configured in WorldCat Discovery, the system will now automatically say No to requests that have an OPAC status of unavailable and requests will move through the lender string faster. (If the OPAC status of the item is anything other than unavailable, or if the OPAC status cannot be returned, the automatic Reason for No will not be applied.)

This also results in a new reason for saying no: No - System checked availability. (Note: This Reason for No is not available for manual selection, but it will appear in the OCLC Usage Statistics, Report Designer, and Request History.)

As a borrower, you may see this Reason for No if the request is sent to a WorldShare ILL or Tipasa library that is utilizing availability and the item status is unavailable. This will help the request move through the lender string...
faster because these lenders won't have to manually process the request.

If your library uses Alma or Sierra and has OPAC availability configured for Tipasa, please contact OCLC Customer Support to make sure auto-no can work for your library.

**Utilize more time to process requests in problem statuses**

Because many libraries remain closed or library users have not returned to campus, some ILL staff have been unable to send back borrowed items or process returned materials. So, you and your ILL team are likely seeing increases in requests that are in "problem statuses":

- **RECEIVED?** – Borrowing library has not yet indicated that a shipped item has been received
- **NOT RECEIVED** – Borrowing library has indicated that a shipped item was not received
- **RECEIVED BUT MISSING** – Borrowing library received the item but the patron indicates it’s been lost
- **OVERDUE** – Borrowing library has not returned an item that is 14 or more days beyond the lender’s due date
- **RETURNED/COMPLETE?** – Lending library has not yet indicated that a returned item has been completed
- **RETURNED BUT MISSING** – Lending library has indicated that a returned item was not received (is missing)

Prior to August 5, requests in problem statuses were moved ("aged") to CLOSED after 180 days. This aging period has now been extended to 365 days.

This extra time will allow you to update requests without the worry that some requests will be moved to CLOSED before they can be updated correctly. The extended aging period will apply to all requests that were in problem statuses on August 5 as well as any requests in those statuses in the future.

To ensure the ILL system is updated properly, you may want to check your problem-status queues for items that are indeed back on the shelf but perhaps did not get checked in through ILL for some reason.

For more information, see [Request aging](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/070Tipas...).

**Use the CCOV profiled group to find lenders that are filling requests for physical materials**

You can now also use the new CCOV group to build lender strings of libraries that are able to ship and receive materials from their physical collections during the COVID-19 crisis.

- **ACOV:** Libraries supplying electronic documents during the COVID-19 crisis
- **BCOV:** Libraries supplying e-books during the COVID-19 crisis
- **CCOV:** Libraries supplying physical collection during COVID-19 crisis

The groups are updated weekly, and a PDF that lists the OCLC symbols for each group (as well as the libraries that also participate in LVIS) is posted [here](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/070Tipas...).

The new CCOV group was built from the Physical ILL Return and Lending Status map based on libraries that have reported being open to receive and ship physical items.
• To check the status of your library and other libraries, go to the [map](#).
• To update the status of your library, go to [oc.lc/mailform](#).

The ACOV and BCOV lists are based on the status submitted for your library with this [form](#), and you can use this same form to update your status.

As a reminder, you can use the profiled groups to build lender strings.

• When viewing a list of holding libraries in WorldShare ILL, Tipasa, or ILLiad, filter by Profiled Group (e.g., CCOV).
• In the OCLC Policies Directory, search by Group Symbol (e.g., CCOV) to identify a list of symbols in the group and copy/paste them into a Custom Holdings Group that you maintain.

For more information on how to make best use of these profiled groups, [view this video tutorial](#).

## 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

### OCLC Resource Sharing Conference web series

OCLC invites ILL professionals and users of OCLC’s resource sharing solutions to join us online for a series of sessions that start on July 8, 2020. We'll discuss how we’re all moving forward together, including best practices and ways to better connect your users with the information they need as your libraries reopen.

This unique series offers an opportunity to learn about the latest resource sharing advancements and to interact with others in the ILL community. You’ll also learn how to improve your operational efficiency, save time, and elevate user services.

There is no cost to register for the RSC20 web series. The series will include the following sessions:

* Outreach and customer service, Wednesday, July 8, 1:00 – 2:00 pm ([recording available](#))
* Using ILL statistics for decision-making, Tuesday, July 28, 2:00 – 3:00 pm ([recording available](#))
* Making ILL materials accessible: Examining the law, current practices, and the future, Thursday, August 13, 2:00 – 3:00 pm
* OCLC/Atlas update, Wednesday, September 2, 1:00 – 2:00 pm
* May the source be with you: VIVA whole e-book lending, Tuesday, September 22, 2:00 – 3:00 pm

*All times are Eastern Daylight Time, North America [UTC -4].
Register in the OCLC Community Center

We look forward to seeing you online. If you have questions, please contact us at community-support@oclc.org.

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, October 15, 2020, 2:00pm, Eastern Daylight Time (New York, UTC-04:00)
Registration: https://www.oclc.org/community/ill_prime/events/pi-october-2020.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
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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