Introduction

The October 7 release of My Account and October 25 release of Tipasa provide new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- Offer your library users pickup locations at any institution in your group (for WMS libraries)
- Utilize improved display of knowledge base holdings for easier creation of lender strings
- Build lender strings for electronic serials more quickly and accurately when filtering by a Custom Holdings Path

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
https://help.oclc.org/Resource_Sharing/Tipasa/WorldShare_Acquisitions_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.

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

For all other library systems, 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

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

Watch the recordings of 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 - view recording

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

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New features and enhancements

Offer your library users pickup locations at any institution in your group (for WMS libraries)

Available October 7, 2020

In My Account, the Edit Request option has been updated to better support WMS groups. Library users at libraries within WMS groups will now be able to select from all institutions and locations within the group.

Prior to this release, the pickup location options appeared at the top right.
Now, these options display below the item thumbnail.
If your library participates in a WMS group, your users will be able to select an institution and specific pickup location.
Library users will temporarily see all pickup locations in the group. Configurations that will allow you to adjust the options that display in the menus will become available with the October release of WorldShare Circulation.

Similar institution and pickup location menus will become available in the October release of WorldCat Discovery.

For more information, see Edit Request.

**Utilize improved display of knowledge base holdings for easier creation of lender strings**

*Available October 25, 2020*
The date coverage display of WorldCat knowledge base holdings on the Holdings page has been improved, making it easier to read the information for creating lender strings.

![Image of Holdings page](image)

These improvements were also made to the Holdings details for specific libraries:
For more information, see [Create and edit requests](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/065Tipas...).

**Build lender strings for electronic serials more quickly and accurately when filtering by a Custom Holdings Path**

*Available October 25, 2020*

For electronic serials, if holdings are filtered by a Custom Holdings Path, the system will auto-populate the lender string based on both WorldCat knowledge base and Local Holding Records (LHR) holdings. This will help with building the best possible lender string and save staff time.
For more information, see filter holdings to build a lender string.

Bug fixes

With the My Account release on October 7, an issue with entering Need by Date in Safari has been addressed. Note that the date format for Safari and IE is yyyy-mm-dd (including the hyphens) regardless of the browser language or locale.

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

For a list of current and recently fixed issues for Tipasa, 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, 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.
OCLC Resource Sharing Conference web series

OCLC invites ILL professionals and users of OCLC’s resource sharing solutions to revisit the sessions of the OCLC REsource Sharing Conference web series. In these recordings, we 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. You’ll also learn how to improve your operational efficiency, save time, and elevate user services.

The series included the following sessions:

- Outreach and customer service (recording available)
- Using ILL statistics for decision-making (recording available)
- Making ILL materials accessible: Examining the law, current practices, and the future (recording available)
- OCLC/Atlas update (recording available)
- May the source be with you: VIVA whole e-book lending (recording available)

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 (view recording)
- Make your usage statistics count (view recording)

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