Introduction

This release of WorldShare Interlibrary Loan provides a new feature in addition to some bug fixes, including:

- Save time by including Profiled Groups in Custom Holdings Paths
- More efficiently search for patrons by using a new index that includes multiple fields

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 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: Tuesday, January 26, 2020, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)
Registration: https://www.oclc.org/content/community/en_us/ill_prime/events/january-2021.html

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
New features

Save time by including Profiled Groups in Custom Holdings Paths

You can now add OCLC Profiled Groups to Custom Holdings Paths. Because the members of these groups are automatically updated at OCLC, you will no longer need to create and maintain your own separate Custom Holdings Groups in OCLC Service Configuration to mirror these groups, resulting in considerable time savings.

To include Profiled Groups in a Custom Holdings Path, go to the WorldShare ILL section within OCLC Service Configuration and create or edit a path.

> Custom Holdings Paths with Profiled Groups can only be completely applied via automations configured in Automated Request Manager.

When you manually limit holdings to a Custom Holdings Path that contains a Profiled Group, by using the filters on the Holdings page, lenders from the Profiled Group will not be added to the lender string. In this case, a warning message will appear.
Click OK to build a partial lender string from the current Custom Holdings Path that does not include symbols from the Profiled Group. Or, click Cancel to close this window and either manually route this request to automation or select a different Custom Holdings Path.

For more information, see Custom Holdings Paths.

**More efficiently search for patrons by using a new index that includes multiple fields**

You can now search for patrons by using a new search index that includes name, ID, and Email, making finding patrons more efficient and effective.
For more information, see Search for patrons.

**Bug fixes**

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: Tuesday, January 26, 2020, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)
Registration: https://www.oclc.org/content/community/en_us/ill_prime/events/january-2021.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

Were you able to join us for all of our Virtual Workshops where we showed how you can optimize your library’s ILL setup and workflows, and save time?

The recordings, slides, and checklists are now available:


Part 2: Construct your custom holdings. Recording, Slides, and Custom Holdings Checklist

Part 3: Automate your request process. Recording, Slides, and Automation Checklist

Part 4: Curate and care for your constant data. Recording, Slides, and Constant Data Checklist

Part 5: Make your usage statistics count. Recording, Slides, and Usage Stats Checklist

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