Tipasa Release Notes, February 2021

Release Date: February 21, 2021

Introduction

This release provides several new features in addition to a few bug fixes. These features will help you manage more complex workflows, including:

- Get items to your library’s users faster by automatically sorting lender strings by turnaround time
- More efficiently borrow print serials with automated consideration of Local Holdings Records

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

https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2021_release_notes/100Tipas...
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:

- A new ILL community-sourced map: Learn lending status and when to return ILL items
- Setting your Days To Respond for loan requests to 16 or 20 as a visual cue to borrowers
- New profiled group CCOV joins ACOV and BCOV
- Reopening your ILL operation: workflow and configuration suggestions
- Using Tipasa automation for mailing to patron’s homes
  - Using Tipasa automation for mailing to home based on patron type/status (PDF)
  - Using Tipasa automation for mailing to home “on demand” (PDF)

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

Date: Wednesday, April 21, 2020, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)
Registration: https://www.oclc.org/content/community/en_us/ill_prime/events/April-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 and enhancements

Get items to your library's users faster by automatically sorting lender strings by turnaround time

You can now shorten the amount of time library users have to wait to receive items by taking advantage of the Automated Request Manager's ability to sort lender symbols by turnaround time. Symbols in a lender string populated by the Automated Request Manager are now sorted by turnaround time, so that those lenders with the fastest turnaround times occur first. Automations set to send requests directly to lenders will also utilize turnaround time to send to the fastest lenders first. Automated Request Manager sorts turnaround time separately for each Custom Holdings Group included in the Custom Holdings Path used by the matching automation.

Turnaround time: Calculated from when a lender is assigned a request to the time when the item is available to the borrower.

- For loans: the time from lender assigned to borrower received
- For copies: the time from lender assigned to lender shipped (because the item is available digitally immediately from when it's marked shipped)

Each lender's turnaround time for copy and loan requests is calculated separately, using data from the past year. This
calculation is performed daily and takes into account consistency over time.

Turnaround time sort takes into account the number of requests in a lender's Can You Supply? queue to prevent overwhelming any given lender. This sorting effectively load balances requests more so than the random sort available previously. Queue depth is calculated hourly.

This is an automatic feature when using Automated Request Manager to build lender strings. To benefit from this new feature, set up automations in OCLC Service Configuration and utilize the action to Build Lender String.

For more information on setting up automations, see Automated Request Manager.

More efficiently borrow print serials with automated consideration of Local Holdings Records

For automations that have the Build Lender String action, Automated Request Manager now checks a potential lender's Local Holdings Records (LHRs) for the specific volume and year being requested.

The print serials lender string works together with the turnaround time sort. The turnaround time sort is given precedence, but the print serials lender string built in automation has the benefit of excluding institutions in each Custom Holdings Group that hold the requested title but have LHRs that indicate:

- The institution does not hold the requested year or volume based on information in the 853 and 863 fields of the LHR
- The institution has set up the lend/copy policy in bytes 20 and 21 of the 008 field of the LHR to indicate it will not lend or copy the item on a title level

When the request does not include a date, all institutions that hold the title will be considered for inclusion in the lender string, regardless of LHRs.

For more information, see OCLC local holdings records.
Utilize more time to process RapidILL requests

You will now have more time to process RapidILL requests. Previously, the expiration date for these requests was set to 48 hours, including weekends. The expiration date is now extended up to 144 hours, depending on the expiry date set by RapidILL.

For more information, see Manage lending requests.

Notes

Aging period extended for problem statuses

On Tuesday, February 9, the aging period for requests in a problem status was increased to 760 days. This allows you more time to update requests without the worry that some requests will be moved to CLOSED before they can be updated correctly. The following statuses are affected:

- 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)

Update to the auto-no feature

The auto-no feature for system checked availability now applies only to loans, not copies. For more information about this feature, see Process requests more quickly using real-time availability and the new auto-no feature.

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: Wednesday, April 21, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)
Registration: https://www.oclc.org/community/ill_prime/events/April-2021.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 (RSC20) web series

OCLC invites ILL professionals and users of OCLC’s resource sharing solutions to revisit the sessions of the OCLC Resource Sharing Conference 2020 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 and slides available)
- Using ILL statistics for decision-making (recording and slides available)
- Making ILL materials accessible: Examining the law, current practices, and the future (recording and slides available)
- OCLC/Atlas update (recording and slides available)
- May the source be with you: VIVA whole e-book lending (recording and slides available)

Virtual Workshop Series: Learn how to fine-tune your ILL setup

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 series included the following topics:

- Part 1: Fine-tune your policies and deflections (recording, slides, and checklist available)
- Part 2: Construct your custom holdings (recording, slides, and checklist available)
- Part 3: Automate your request process (recording, slides, and checklist available)
- Part 4: Curate and care for your constant data (recording, slides, and checklist available)
- Part 5: Make your usage statistics count (recording, slides, and checklist available)
Support websites

Support information for this product and related products can be found at:

- Tipasa product website
- OCLC Community Center
- OCLC Support
- Browser compatibility chart