Tipasa Release Notes, April 2021

Release Date: April 16, 2021

Introduction

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

- Better prioritize request processing with the new Time To Respond calculation
- Utilize Canadian and Spanish copyright compliance types
- Utilize extended interoperability with other group systems and peer-to-peer requesting

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.

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<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 the 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.

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.
Share these release notes with your colleagues.

Register for upcoming presentations included in the OCLC Resource Sharing Conference 2021 Web Series.

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

#### Better prioritize request processing with the new Time To Respond calculation

You can now see lending requests based on the time you have left to respond to the request to help you better prioritize your ILL workload. The Time To Respond value (shown in hours and days) is now being calculated and will display in the place of the Referral Date column.

**How Time To Respond is calculated**

Multiple factors determine when a request will disappear from a lender’s Can You Supply? and related queues. The following are considered when calculating Time To Respond:

- The date and time the queue is being accessed
- The lender’s Days To Respond from OCLC Policies Directory
  - Days To Respond for Copies
  - Days To Respond for Loans
- Non-aging days
- The borrower’s Need Before Date

The calculation takes into account the sooner of the expiration or aging date and displays the difference in time between when the queue is being accessed and the ultimate aging/expiration date. The values displayed in this **Time To**
Respond column are:

- <12 hours
- <24 hours
- >1 day
- >2 days

New default request sort
Previously, all queues were sorted in Request ID order by default, with the highest numbered request (most newly created in the system) at the top. Now, the default sort is by Time To Respond so that requests with the least amount of time before aging/expiring display at the top.

You can re-sort by any of the columns if you prefer to view the list by Request ID, for example.

A note about terminology
Due to recently released functionality involving Turnaround Time and Time To Respond, the following definitions are included for reference:

- **Days To Respond**: A library-set value in the OCLC Policies Directory. This value determines how long a lending request stays with your library before aging to the next lender. Days To Respond is not synonymous with turnaround time. A library with Days To Respond of 4 in the OCLC Policies Directory may often process requests much more quickly

- **Turnaround time**: A system calculated value based on real data. It is the actual amount of time (in hours or days) that a lender takes from the time it receives a lending request until the time the request is marked shipped.
Borrowing turnaround time looks at the amount of time from when the request was produced (first sent to lenders) until the time it is received. The turnaround time sorted lender strings built in automation look at the last year’s worth of each potential lender’s lending turnaround time and update those turnaround time values for copies and loans on a daily basis.

- **Time To Respond**: This is the calculated time a lender has from the current date/time until the request will either age to the next lender, age to unfilled, or expire. This value is designed to help lenders work on the requests that most urgently need attention and respond no to requests that will age before they can work on them.

**Utilize Canadian and Spanish copyright compliance types**

The new copyright types described below will appear only for libraries in Canada and Spain, respectively. Libraries outside these countries will start to see these copyright types in lending requests when a request is received from a library in Canada or Spain. These requests can continue to be processed as normal.

**Choose relevant Canadian Copyright types when borrowing items**

If you're at a Canadian library processing a borrowing request, you'll now see the following options:

- **Copyright Compliance**
  - **Fair Dealing**
  - **None**

As a lender, if you receive a request from a library in Canada, you may see the copyright compliance type of Canadian Copyright Act 2012. This corresponds with the Fair Dealing type above. These requests can be processed as normal.
Choose relevant Spanish Copyright types when borrowing items

If you're at a Spanish library processing a borrowing request, you'll now see the following options:
Spanish libraries can also utilize the Copyright Signature functionality. If a library user submits a request from the Patron Request Workform and acknowledges the Copyright statement, Signature Obtained will be selected automatically. Otherwise, you can choose the applicable signature status.

As a lender, if you receive a request from a library in Spain, you may see these copyright compliance types in the Copyright Compliance field. These requests can be processed as normal.

**Utilize extended interoperability with other group systems and peer-to-peer requesting**

With the new ISO 18626 standard now available for WorldShare ILL and Tipasa, your library can utilize extended interoperability with other group systems (initially D2D) and peer-to-peer requesting (ISO-based systems that have implemented ISO 18626, initially RelaisILL). This expands the reach of the OCLC ILL network while keeping all requests in the WorldShare ILL or Tipasa interface, allowing you to process these requests just like any other.

**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](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 (RSC21) web series**

OCLC invites you and thousands of ILL professionals and users of OCLC resource sharing services to join us for [RSC21](#). This year’s series of six free, virtual sessions will feature electronic document delivery, controlled digital lending, and moving resource sharing forward during this challenging time.
Each session is scheduled for 90 minutes and will include a 60-minute presentation followed by 30 minutes for Q&A and interactive discussion. (NOTE: The 30-minute discussions will not be recorded.)

RSC21 includes these sessions:*

- **Tuesday, March 30, 1:00-2:30 pm** | “Page, scan, send, reshelve: A mobile scanning station for ILL electronic document delivery service” ([recording](#) and [slides](#) available)
- **Wednesday, April 28, 11:00 am-12:30 pm** | “ILL and the pandemic: Learning from the unexpected”
- **Wednesday, May 12, 1:00-2:30 pm** | “Renewing resource sharing in challenging times: Collaborating to meet library user needs and demonstrating the value of ILL services”
- **Tuesday, May 25, 1:00-2:30 pm** | “Managing resource sharing during COVID-19 pandemic: Experiences and impacts—three perspectives”
- **Thursday, June 10, 1:00-2:30 pm** | “Controlled digital lending in two private academic libraries: Same services with diverse tools”
- **Tuesday, June 15, 11:00 am-12:30 pm** | “A look at ILL into the future: An update on your ILL services”

*All listed times are Eastern Daylight Time, North America [UTC -4].

This year’s agenda is built on topics that the program committee felt would be useful to ILL professionals as pandemic impacts on libraries continue.

Please visit the [RSC21 website](#) for complete registration details and full session descriptions.

**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](#)