December 2021 digest

The year 2021 was filled with challenges and change, as we continued to adjust to the impacts of the COVID-19 pandemic. With your ideas and feedback, we introduced new features and enhancements to help you better manage your ILL workflows. And, virtual events provided a way for ILL community members to stay connected and share information.

2021 highlights

<table>
<thead>
<tr>
<th>Highlight</th>
<th>Resource</th>
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<tbody>
<tr>
<td>DELIVERY SPEED</td>
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<tr>
<td>Save staff time and get resources to library users even faster with <strong>smart fulfillment</strong> functionality—available across all OCLC resource sharing services (WorldShare ILL, Tipasa, and ILLiad)</td>
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DETAILS

- Get started with **smart fulfillment** (also at this webpage: [oc.lc/sf-get-started](https://oc.lc/sf-get-started))
  - [Real-time availability for ILL](https://oc.lc/realtimeill) (to request setup, use this form: [oc.lc/realtimeill](https://oc.lc/realtimeill))
  - [Automated Request Manager](https://oc.lc/automated-request-manager)
  - [Smart lender strings](https://oc.lc/smart-lender-strings)
  - [Express program](https://oc.lc/express-program)
  - [Improve turnaround time](https://oc.lc/improve-turnaround-time) – Actions for borrowing and lending

EVENT RECORDINGS

- [OCLC Resource Sharing User Group Meeting – ALA Annual 2021](https://oc.lc/resource-sharing-user-group-meeting) (1 hour)
  - Hear how three libraries respond to ILL requests within 2.9 hours on average. They explain how they achieve their fast turnaround times as well as share tips and best practices.
- [Maximize the delivery speed of your resource](https://oc.lc/maximize-delivery-speed)
sharing service* (1 hour)
- Hear ILL community members share how they get resources into library users’ hands quickly and efficiently. They discuss how automating request processes can be customized by weighing ILL policy data, lending history, licensing agreements, format preferences, and more.

- Embracing automation to improve ILL turnaround time and save staff time* – Northwest ILL Conference 2021 (47 minutes)

OCLC NEXT BLOG

- Why a "Library on-demand" vision benefits from pandemic wisdom – by Cathy King, March 2021
- Getting smarter – by Peter Collins, June 2021

DETAILS

- Other OCLC services that interact with smart fulfillment - WorldCat knowledge base and local holdings records (LHRs)

EVENT RECORDINGS

- The Impact of Accurate Holdings: Joining Forces to Speed Your ILL Service – Northwest ILL Conference 2021 (9 minutes)
  - With services your library already uses, get resources into users’ hands more quickly and accurately.

- Maximizing your investments in OCLC services* (1 hour)
  - Hear OCLC experts and librarians share their insights and discuss how to get resources into users’ hands faster with OCLC services. They discuss the importance of accurate WorldCat holdings, including what they are and how they impact other OCLC services, including WorldShare ILL, FirstSearch, and more.

ACCURATE HOLDINGS

Ensure you don’t receive requests for serial years or volumes not held by your library with up-to-date local holdings records (LHRs) and WorldCat knowledge base collections

STANDARDS AND APIs

https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2021_release_notes/070Tipas...
Optimize resource sharing with ILL Direct Transfer and ILL APIs

- **ILL Direct Transfer service** – available for integrated library systems (ILSs) from Ex Libris and Innovative

**EVENT RECORDING**

- **DevConnect 2021: Managing and highlighting collections using APIs*** (52 minutes)

**EDUCATIONAL OPPORTUNITIES**

Update your knowledge and skills with community events and training sessions

- **RSC21 web series*** (six 1-hour recordings)
- **Works in Progress Webinar: It's Here! The OCLC Interlibrary Loan Cost Calculator*** (1 hour)
- **OCLC Virtual Workshop: “You had me at data”—Using statistics to up your ILL game** – Northwest ILL Pre-conference (2 hours)

**ONLINE TRAINING, VIDEOS, AND TUTORIALS**

- **Tipasa Training**

*Hear from your Resource Sharing community colleagues!

**Full digest of new features and enhancements**

Automate and improve workflow efficiencies

<table>
<thead>
<tr>
<th>Enhancement</th>
<th>Release date</th>
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<tbody>
<tr>
<td><a href="https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2021_release_notes/070Tipasa...">Get items to your library's users faster by automatically sorting lender strings by turnaround time</a></td>
<td>February 2021</td>
</tr>
<tr>
<td><a href="https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2021_release_notes/070Tipasa...">Better prioritize request processing with the new Time To Respond calculation</a></td>
<td>April 2021</td>
</tr>
<tr>
<td><a href="https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2021_release_notes/070Tipasa...">Utilize Canadian and Spanish copyright compliance types</a></td>
<td>April 2021</td>
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<tr>
<td><a href="https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2021_release_notes/070Tipasa...">Utilize extended interoperability with other group systems and peer-to-peer requesting</a></td>
<td>April 2021</td>
</tr>
<tr>
<td><a href="https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2021_release_notes/070Tipasa...">Improve citation accuracy and streamline workflows with the new PMID lookup feature</a></td>
<td>June 2021</td>
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<tr>
<td>Enhancement</td>
<td>Release date</td>
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<tr>
<td>---------------------------------------------------------------------------</td>
<td>--------------</td>
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<tr>
<td>Quickly see your library’s lending and borrowing turnaround times</td>
<td>August 2021</td>
</tr>
<tr>
<td>Utilize Time To Respond improvements to better prioritize request processing</td>
<td>October 2021</td>
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<tr>
<td>Discover items more efficiently using new search customization options</td>
<td>October 2021</td>
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**Better manage e-resources**

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<tr>
<td>More efficiently borrow print serials with automated consideration of Local Holdings Records</td>
<td>February 2021</td>
</tr>
<tr>
<td>Customize Article Exchange settings to better reflect your library’s policies and the copyright policies in your country</td>
<td>October 2021</td>
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**Utilize local date formatting**

<table>
<thead>
<tr>
<th>Enhancement</th>
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<tr>
<td>Utilize local date formats in notifications</td>
<td>December 2021</td>
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**Note COVID-19-related changes**

<table>
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<tr>
<th>Enhancement</th>
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<tr>
<td>Utilize more time to process RapidILL requests</td>
<td>February 2021</td>
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<tr>
<td>Aging period extended for problem statuses</td>
<td>February 2021</td>
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**Enhance library users' experience**

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<tr>
<td>ACCESSIBILITY</td>
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<tr>
<td>Provide library users with skip navigation and improved tabbing for increased accessibility</td>
<td>April 2021</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
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<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
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<tr>
<td><strong>CUSTOMIZATION</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Link to cookie notice and accessibility statement</td>
</tr>
<tr>
<td></td>
<td>Enhance your users’ experience with a floating chat button</td>
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<tr>
<td></td>
<td>Configure new link and navigational bar colors to customize My Account for your library users</td>
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<tr>
<td></td>
<td>Display a custom message for your library users</td>
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<tr>
<td></td>
<td>Choose your own label for the Resources menu</td>
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<tr>
<td><strong>INACTIVITY TIMEOUTS</strong></td>
<td>Provide library users with interface enhancements, including improved inactivity notifications</td>
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<tr>
<td><strong>NOTIFICATIONS</strong></td>
<td>Ensure library users receive updates on ILL requests</td>
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<tr>
<td><strong>REQUEST FORMS</strong></td>
<td>Provide a better experience on patron request forms for Country, State/Province, and Format fields</td>
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<td>Include links and formatting in ILL patron request forms to better communicate with users</td>
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<tr>
<td><strong>FOR WMS LIBRARIES</strong></td>
<td>Identify My Account activity in WorldShare Circulation and Reports</td>
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<tr>
<td></td>
<td>Utilize new messages to communicate when an item is available for in-house use only</td>
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<tr>
<td></td>
<td>Provide improved messages for WorldShare Circulation renewal failures</td>
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<tr>
<td><strong>FOR WORLDCAT DISCOVERY SUBSCRIBERS</strong></td>
<td>Automatically hide WorldCat Discovery features to provide your users with a more consistent discovery experience</td>
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For the full list of updates, see [2021 My Account release notes](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2021_release_notes/070Tipasa...).
Additional event recordings

Tipasa community meeting

Tipasa community members gathered for a virtual meeting in October 2021 to share tips and experiences.

To access the recording and slides, see the Tipasa community meeting event page. A community resources list that includes best practices, tips, and support resources is also available.

Smart fulfillment office hour

OCLC product experts offered an office hour session in December 2021 for helping your library make the most of smart fulfillment.

See Tipasa office hours: Smart fulfillment to access the recording and slides from this Q&A session on automated request manager, smart lender strings, real-time availability, and the knowledge base integration, as well as how to use statistics to monitor progress.

OCLC Resource Sharing Conference (RSC21) web series

OCLC invites you to revisit the sessions of the OCLC Resource Sharing Conference 2021 Web Series. 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.

Recordings and slides are available at the links below for all six sessions:

- Page, scan, send, re-shelve: A mobile scanning station for ILL electronic document delivery service (March 30, 2021)
  Xuan (Lily) Pang, Director of Access and Resource Sharing, University of Florida
  Lara J. Beserock, Library Assistant III, University of Florida
  Ashley Monahan, Interlibrary Loan Assistant, University of Florida

- ILL and the Pandemic: Learning from the unexpected (April 28, 2021)
  Anna Vaglio, Bocconi University
  Mattia Fortunati, Bocconi University
  Agnese Riva, Bocconi University
  Petra Otten, Wageningen University & Research Library
  Dicky van Donselaar, Wageningen University & Research Library

- Renewing library resource sharing in challenging times: Collaborating to meet library user needs and demonstrating the value of ILL services (May 12, 2021)
  Bethany Sewell, The College of New Jersey
Katie Cohen, Ramapo College of New Jersey
Meg Massey, The Pennsylvania State University
Phoebe Walker, New York University
Lapis David Cohen, University of Pennsylvania
Beth Posner, The Graduate Center, CUNY
J. Silvia Cho, The Graduate Center, CUNY

• Managing resource sharing during the COVID-19 pandemic: experiences and impacts (May 25, 2021)

Ashli Wells, Vanderbilt University Massey Law Library
Robyn Weisman, Vanderbilt University Heard Libraries
Marta Ambroziak, New York Medical College
Brynne Norton, University of Maryland College Park
Lorraine Woods, University of Maryland College Park

• Controlled digital lending in two private academic libraries (June 10, 2021)

John Raymond, Siena College
Diana Hurlburt, Siena College
Peter Bae, Princeton University

• A look at ILL into the future: An updated on your ILL services (June 15, 2021)

Peter Collins, OCLC
Cathy King, OCLC
Stephanie Spires, Atlas Systems (ILLiad)

Product Insights: Resource Sharing

For overviews of 2021 features and enhancements, review the recorded 1-hour webinars for Product Insights: Resource Sharing.

• January 26, 2021
• April 21, 2021
• July 13, 2021
• October 21, 2021

Important links

OCLC Community Center

The community pages provide Discussions, News, and Events for the Tipasa community, as well as regular updates on and outcomes from product research activities coordinated by the OCLC Resource Sharing Product Team.

For the latest updates, see the Interlibrary Loan Notes.
OCLC Research: SHARES

As institutions evolve toward a notion of “collective collections,” resource sharing partnerships that expand access to collections are of primary importance. SHARES, the resource sharing consortium of the OCLC Research Library Partnership, unites trusted partners that provide low-cost access to their diverse collections. SHARES also supports resource sharing innovation and best practices.

For the latest activities, see SHARES.

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

Were you able to join us for the 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)

OCLC Support sites

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

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