Tipasa Release Notes, February 2022

Release Date: February 20, 2022

Introduction

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

- **Discover Items more efficiently using new search customization options**

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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*For best performance, it's very important to clear your browser's cache before starting to work with Tipasa!*

Be sure to utilize **Smart fulfillment** functionality, including:

- **Real-time availability for ILL**, which significantly reduces the number of times you respond “no” and “In use, on loan”.
- **Automated Request Manager**, which enables you to save time by automating routine ILL workflows.
- **Smart lender strings through the Automated Request Manager**, which helps you improve fill rates and turnaround times.
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 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.

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.

Don't forget to utilize the reporting capabilities for Tipasa in WorldShare Report Designer. An overview recording is available in the OCLC Community Center:
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.
- Have you signed up for email alerts for News in the [Community Center](https://www.oclc.org/community/ill_prime/events/analytics.en.html)? This ensures that Tipasa release notes and events come straight to your inbox.

New features and enhancements

**Discover Items more efficiently using new search customization options**

You can now customize search option preferences, both for basic and advanced searching. These settings are remembered from session to session and are based on username, so each staff member can customize this based on their own preferences.
Searching - Basic

For basic search, you can now customize the default scope and sorting method.

You can also choose which search indexes will be displayed in the menu, and in what order. To change the default sorting method and search index, click the hyperlinked search scope name. When done making customizations, remember to save.
Searching - Advanced

For advanced search, you can customize in the same ways as the basic search but with more indexes to choose from. It allows you to set an optional language of cataloging and source of cataloging preference.

For more information, see Discover Items.

Bug fixes

When circulation integration is turned on for WMS and Alma users, the check-in item action will be successful. Previously, this action resulted in an error message.

Requests can be resubmitted when a lender in the previous string changes their supplier status to no. Previously, this resulted in an error message.
Known issues
A current list of known issues can be found here.

Future releases
Roadmap information is available in the OCLC Community Center.

Important links

OCLC Resource Sharing Conference (RSC21) web series

OCLC invites you to view the recordings of the presentations from the 2021 OCLC Resource Sharing Conference web series. This series of six free, virtual sessions featured electronic document delivery, controlled digital lending, and moving resource sharing forward during this challenging time.

RSC21 included these sessions:

- **Tuesday, March 30, 1:00-2:30 pm** | “Page, scan, send, reshelving: A mobile scanning station for ILL electronic document delivery service”
- **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”

Recordings of these 60 minute presentations are available here.

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