Introduction

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

- More efficiently build lending automations with more detailed error messaging
- Coming soon: Streamline off-system requesting with partner records
- Coming soon: View the Article Exchange interface in French

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
• **Turnaround Time dashboards** and tips to **Improve turnaround time**

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](https://help.oclc.org) 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](https://help.oclc.org) 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](https://help.oclc.org)? 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](https://help.oclc.org).
Don't forget to utilize the 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

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.

New features and enhancements

More efficiently build lending automations with more detailed error messaging

You can now see more specific error messages when saving a lending automation in service configuration. Generic error messages have been replaced by specific error messages that point out blank or missing fields, duplicate automation names and priorities and more.
More information can be found here.

**Coming soon**

**Streamline off-system requesting with partner records**

On October 25, a new Address Book option in OCLC Service Configuration will allow you to create and maintain details about off-system institutions that you borrow from and lend to.

With a future release, you will be able to use these records to populate the partner details in your off-system borrowing and lending requests, removing the need to enter all the information individually into each off-system request.

By default these partner records are private to your library. Please note that if you belong to a WMS Group the partner records of all the member libraries will be visible and editable by all the member libraries in the group.

**Note**: The former Contacts option has been renamed Address Book. If you previously saved Contacts, you can access those in the Branches tab of the new Address Book.

**Add a new partner to the address book**

You will be able to add a new library partner to the Address Book by navigating to OCLC Service Configuration and selecting WorldShare ILL > Address Book.
To add a new partner, click the Add Partner button. Note that partner name and symbol must be unique from other partners. Each partner record holds information about the partner's identity, their role in off-system ILL transactions with the creating OCLC library, and their Billing, Shipping and Return addresses. Because partners will be linked to off-system ILL requests, they cannot be deleted once created but they can be flagged as inactive so that they cannot be included in future transactions.

Add off-system partner details to an off-system request

In a future release, you'll be able to associate these partners to an off-system request. OCLC has delayed this functionality so that you have time to add your partner records to the system in advance of requiring a partner for each off-system request.
Off-System Request Details

* indicates required fields

Please enter off-system request details

Lender Name*
Choose...

Lender Symbol*

Email Address *
East County Library

Need Before *
12/11/2022
For more information, see Off-system requesting.

**View the Article Exchange interface in French**

On October 28, you will be able to view the Article Exchange interface, including error and success messages and the header and footer, in French.

For more information, see Article Exchange. More information can be found here.

**Bug fixes**

- On the holdings screen, Year is now translated. On the tabbed search history, Holdings is also translated. Previously, these words always displayed in English.
• Some Automation Notes in Automation History are now translated. Previously, these always displayed in English.

• Lending automations matching on profiled groups will now properly match based on symbols in the group. Previously, some requests matched on profiled group incorrectly.

• A warning message about constant data persistence being turned on in service configuration when an automation has acted to apply constant data to a lending request will now only appear when a lending request is in a status where constant data can be updated by lending staff. Previously, this warning appeared at every step of the lending workflow.

• In Request History > ISO History, the Refresh link text is now translated. Previously, this always displayed in English.

**Known issues**

A list of current and recently fixed issues can be found [here](#).

**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, October 25, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)


Please note the session time zone 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 (RSC22) web series

OCLC invites you to view the recordings from past presentations in the 2022 OCLC Resource Sharing Conference web series. This year’s series of free, virtual sessions featured ILL 101 sessions, automation, controlled digital lending, and moving resource sharing forward during this challenging time. Recordings and slides are available in the community center.

RSC22 included these sessions:

- Working smarter not harder: How to automate your holdings and configure policies to expedite fulfillment | Recording
- Lightning sessions: Resource sharing at the Internet Archive and E-book lending/borrowing demystified | Recording
- The persistence of CONTU: The results of two surveys | Recording
- Controlled digital lending for resource sharing: Law and policy since 2018 | Recording
- A look into the future of ILL services | Recording
- Controlled digital lending during global COVID-19 and beyond | Recording

In partnership with IDS Project, recordings of pre-conference ILL 101 sessions are also available at the Online Learning Institute.

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