Introduction

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

- Add off-system partner details to an off-system request
- More efficiently process overdue off-system requests with the overdue status
- Save time by automating off-system overdue notices for lending requests
- See dates adjusted for your library’s time zone (coming in January)

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”
**ACTION**

- **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.


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/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests#View_local_holdings_and_availability) 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/Borrowing_Requests/Process_requests#View_local_holdings_and_availability)

[https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/Tipasa_Non-WMS_Circulation_Integration](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/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests#View_local_holdings_and_availability) 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/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.


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**.
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.

Share these release notes with your colleagues.

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.

New features and enhancements

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

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

You can now 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.

Note: Off-system requesting functionality was first introduced in April 2022. Learn more in the Tipasa release notes, April 2022.

Moving a borrowing request to off-system request
Creating an off-system lending request
For more information, see [Off-system requesting](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2022_release_notes/075Tipas...).

**More efficiently process overdue off-system requests with the overdue status**

Off-system lending and borrowing requests that are 14 days overdue will automatically have the overdue status applied.
Save time by automating off-system overdue notices for lending requests

You can now configure a notification to be sent to the borrowing library when an off-system request moves to the overdue status. This notification is available for manual and automated sending and is configurable in Service Configuration > WorldShare ILL > Notifications.

The notification can be edited and customized to ensure it includes the information and wording you’d like to send to the borrowing library.
Please note that this notification only applies to off-system requests and will not be automatically sent for any requests other than those that are currently off-system. When you send notifications manually, the template is only available when working in your off-system lending queue.

These notifications will appear in the Request History > Notification Log of the request.
The Resend action in the Notification Log will now pre-populate the email address of the recipient of the notification.

Note: For overdue borrowing requests, the existing borrowing library to patron overdue notifications will be sent to patrons as specified in the notification area of OCLC Service Configuration for both regular and off-system requests.

For more information, see Notifications.

See dates adjusted for your library's time zone

Coming in January 2023

In your WorldShare ILL interface and the OCLC Policies Directory, you'll see accurate dates regardless of your global location.

Note

In OCLC Service Configuration, you may notice a new WorldShare ILL request form. Only the Tipasa patron request workforms are recommended for use by Tipasa libraries (not the WorldCat Discovery and WorldShare ILL request form).

Bug fixes

- You will now see the patron's need before date in the patron notes field of the request. Previously, this was not being retained.
- If you have format type as a field on your request form, the media type icon will display in your lending queue. Previously, this icon wasn't displayed until the request was opened.
- The source field in your borrowing requests that originated from the forms in My Account will now say PATRON. Previously, this read OCLCILLAPI.
- You can now send a French-translated email from the Article Exchange interface without errors. Previously, typos existed in the email.
Known issues

For a list of current and recently fixed issues, see Known issues.

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: Thursday, February 2, 2:00pm, Eastern Daylight Time (Eastern Standard Time, UTC -05:00)
Registration: https://www.oclc.org/community/ill_prime/events/rspi-feb-2023.en.html

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 website(s)

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

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