Tipasa release notes, June 2017

Release Date: June 30, 2017

Browser support

When accessing WorldShare Reports, use one of the following browsers:

- Chrome (latest version)
- Firefox (latest version)
- Safari (only supported on Mac OS X)

Before attempting to run reports, verify that your browser's pop-up blocker is turned off.

Note: All versions of Microsoft® Internet Explorer are not fully supported.

Recommended actions

For this release, we recommend that you review the following checklist and complete the relevant tasks so that you can adjust your policies and workflows and train your staff. This checklist identifies 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 items that might require additional action or follow up by your institution.

Administrative actions

These items require immediate action or decisions.

<table>
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<tr>
<th>ACTION</th>
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<tbody>
<tr>
<td>Following the release, we recommend that you clear your browser’s cache before starting to work with Tipasa or WorldShare Reports.</td>
</tr>
<tr>
<td>Before attempting to run WorldShare Reports, verify that your browser’s pop-up blocker is turned off.</td>
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<tr>
<td>Share release notes with your colleagues.</td>
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Release notes

Document Delivery Reports

As of this release, three Document Delivery reports are available on the WorldShare Reports platform exclusively for Tipasa customers. If your institution also has WorldShare Management Services (WMS), you will have access to these new reports on 29 June 2017. Otherwise, it may take several days before the reports are available to your library.

Document delivery data is available from the first time your library used the document delivery functionality in Tipasa through the end of the previous calendar month. Data will be available to you by the third day of the month (U.S. Eastern Time). For example, June 2017 data should be available by 3 July 2017.

Document Delivery Activity Overview

The overview report provides a summary of document delivery requests and fulfillments. The columns represent the number of requests supplied each month. The line graph tracks average turnaround time.

Note: Turnaround time is calculated from when the request was created to when library staff mark it as complete / filled. Calculations are provided in days, e.g., 1.1067 days is approximately equal to 1 day, 2 hours, 33 minutes, and 38 seconds.
Document Delivery Request Detail

This report provides a detailed listing of document delivery requests that were created, cancelled, expired, or closed during the time period selected. You can refine your results by material format, language, and source system.

**Note:** Dates and times are presented in U.S. Eastern Time. You may adjust the Start Date and End Date prompts to include time periods in your local time. For example, to represent midnight Pacific Time, select 9:00 PM on the preceding date.
Document Delivery Request Statistics

The Request Statistics report provides three different views in a single report. You can quickly view document delivery statistics for a given time period by patron status, patron department, or material format. Use the input controls on the left-hand side to switch between views.

Getting started with WorldShare Reports

To access the Document Delivery reports, log into WorldShare and navigate to Analytics → Reports → Reports → Interlibrary Loan Reports:
System requirements and user roles

Use one of the following browsers to view Tipasa Document Delivery reports:

- Chrome (latest version)
- Firefox (latest version)
- Safari (only supported on Mac OS X)

Note: All versions of Microsoft® Internet Explorer are not fully supported.

Before attempting to run reports, verify that your browser’s pop-up blocker is turned off.

Tipasa users with the WORLDSHARE_ILL_ADMIN role can access all reporting features in WorldShare. See the Tipasa Help for more information about adding or editing user privileges.

Running reports

Expand the Interlibrary Loan Reports menu and then click on the name of the report you wish to run. The report will open in a new browser tab.

Complete all required prompts (red arrow) and verify the optional prompt selections. Click OK to run the report:
Partial results*

Results sets in excess of 50,000 rows will retrieve partial results. When this warning icon displays in the bottom-right corner of the screen, use the report prompts to further limit the scope of the report:

Exporting

You may download a copy of your report for future use. Clicking the export button opens a dialog box:

The 'Reports' option will generate an export of the fully formatted report. You can select PDF, XLSX, XLS, CSV, or text file type.
Each file type has additional options. For example, the PDF option will allow you to control which pages of the report you wish to print, CSV allows you to choose which special character (comma, semicolon, or tab) will be used to delimit columns, and the Excel formats allow you to prioritize the original formatting of a report or the ease with which you can view and manipulate the data in Excel.

The 'Data' option will generate an export of only the underlying data in a report in a CSV file: all formatting such as images or titles will be excluded.
For an optimal experience, leave the charset selection set to its default, UTF-8. Image DPI should also remain on the default setting.

Other reports

WorldShare Collection Evaluation: My Library

Tipasa customers have complimentary access to the My Library collection analysis tool. My Library can be used to assess your library’s title-level holdings in WorldCat. WorldCat holdings data is updated weekly.

For more information, access the help guide for My Library. Consider bookmarking the link for future reference.
Note: ‘Last Circulated Date’ and ‘Circulated # times in lifetime’ limits are available to libraries with WorldShare Management Services or a full subscription to WorldShare Collection Evaluation. The ‘Location’ limit is available to libraries that have loaded Local Holdings Records (LHRs) in WorldCat.

You can retrieve exported title lists from My Files → Download Files under the Analytics tab:

OCLC Usage Statistics

OCLC Usage Statistics provides comprehensive interlibrary loan (ILL) data to OCLC members who use resource sharing products including Tipasa and ILLiad. The data available through this resource allows you to understand your ILL operation in terms of number of borrows and loans, fill rate, turnaround time, who you lend to, who you borrow from, and your detailed usage of Interlibrary Loan Fee Management (IFM).

Once logged in to Tipasa, click the link from the Tipasa Home screen to go to OCLC Usage Statistics:
Navigate to the OCLC WorldShare Interlibrary Loan and/or Assessment Tools sections in the left-hand menu:

Reports are available in OCLC Usage Statistics on a monthly basis. In general, data for the previous month’s activity is made available by the 10th day of the following month (e.g., June 2017 data will be available by 10 July 2017). Reports will display if your institution has relevant data for the selected month and year. You may export reports or set up automatic email delivery.

**Note:** You will need your library’s nine-digit ILL authorization number and password to access these reports. If you need help with your authorization number, contact [OCLC Order services](https://help.oclc.org/Resource_Sharing/Order_services).

**Known issues**

List of currently known and recently fixed issues is available at: [https://help.oclc.org/Resource_Sharing/Tipasa/.../Known_issues](https://help.oclc.org/Resource_Sharing/Tipasa/.../Known_issues)
Future releases

Roadmap information is available at: OCLC Tipasa Community

Important links

Product website

More production information can be found at: http://www.oclc.org/en/tipasa.html

Support websites

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

• Browser compatibility chart
• Release notes
• Training
• Documentation
• OCLC Support

When calling OCLC Customer Support (U.S.), press option 7 to be directed to the Tipasa Tier 1 Support Specialist.

OCLC Community Center

At the OCLC Community Center, you can:

• Connect with community peers
• Collaborate, ask questions and gain insights
• Contribute and share ideas to improve products
• Stay on top of and discuss OCLC announcements

OCLC Community Center

Notices

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