Tipasa release notes, December 2017

Release Date: December 16, 2017

Browser support

This release was tested with the following browsers:

- Chrome (latest version)
- Firefox (latest version)
- Internet Explorer 11

Adobe Reader and JavaScript need to be enabled.

https://help.oclc.org/Librarian_Toolbox/Browser

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. 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>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Following the release, we recommend that you clear your browser's cache before starting to work with Tipasa.</td>
</tr>
<tr>
<td>Have you updated addresses in all your borrower and lender Constant Data? 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.</td>
</tr>
<tr>
<td>Have there been any changes in your contact information or lending policies? If so, please make the appropriate updates in Policies Directory.</td>
</tr>
</tbody>
</table>
Share release notes with your colleagues.

https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2017_Release_notes/075_201...

Workflow improvements

See complete citation information while selecting lenders

Prior to this release, a limited amount of citation information such as author, title, and publisher was displayed while you reviewed holdings and created the lender string. Additional fields are now included to help you more easily compare the volume, issue, and page information for article requests with the holding information provided by lending libraries.

Save local holdings information with document delivery and borrowing requests

Previously, only lending requests included the Local ID field for saving local holdings information. You can now save
local information with document delivery and borrowing requests.

Include shelving information on document delivery request printouts

For document delivery requests, the Local ID is now included on pull slips to assist with pulling items for scanning or shipping.

Additional details for these workflow improvements are available in the Tipasa documentation:

https://help.oclc.org/Resource_Sharing/Tipasa
Submit and fulfill RapidILL copy requests

RapidILL member libraries are being sought for Spring 2018 Tipasa cohorts. If you are interested in implementing Tipasa in that timeframe and using the RapidILL integration, please contact OCLC Support (support@oclc.org). We ask that you do not turn on this feature until OCLC staff provide you with instructions and full documentation.

Tipasa libraries with a subscription to RapidILL can now submit and respond to copy requests through RapidILL (OCLC symbol RAPID) within the Tipasa interface.

When a library with RapidILL enabled creates a request in Tipasa with RAPID in the lender string, a new request is created in the RapidILL system. RapidILL tries the request with one lender at a time, selected from a pod, or group of libraries. If one of those lenders is also using Tipasa, a new lending request will be generated in Tipasa to reflect the RapidILL request.

Enabling of RapidILL in Tipasa involves turning on the functionality within Service Configuration and creation of a Direct Request profile for sending requests to RapidILL.

RapidILL Borrowing

Typically, patron-initiated requests will be automatically sent to RapidILL lenders. These requests appear in the Produced (Awaiting Response) queue.
However, if a local holding is found, the request is routed for review and the Holdings Source will be shown as RAPID. You can then fulfill the request locally.

The request history includes the steps performed via Direct Request, as well as the original values in case they are needed.

If a request is filled by a RapidILL lender, the lender symbol is shown as RAPID.
To deliver RapidILL requests that have been supplied by Article Exchange directly to the patron without ILL staff intervention, include "RAPID" in your list of Proven Senders.

**RapidILL Lending**

You'll likely want to identify RapidILL requests in Tipasa for quicker processing. This is done by creating a Lending Priorities group for RAPID.
RapidILL requests will then be identified in your Lending Priorities queue.

RapidILL lending requests are processed in the same way as other lending requests. The borrower is shown as RAPID

Pilot feature: View local holdings and availability for patron-initiated requests

A number of Tipasa libraries are needed to pilot test this integration with various local catalogs. If you are interested in this pilot testing, please contact OCLC Support (support@oclc.org) and a member of the Resource Sharing team will get back with you with further information. Initially this feature will only be enabled for pilot libraries.
To view local holdings information and availability, you previously would check your local catalog in a separate browser window or tab. For patron-initiated borrowing and document delivery requests, the retrieval of local holdings information will be automated to reduce clicks and save you time. The local holdings information will be saved with the request for inclusion on pull slips and book straps, to assist with pulling items for scanning and shipping.

Note: Automation for lending requests is not yet available but is being scheduled for a future release.

When this holdings and availability check is enabled, requests submitted via the patron interface will include local holding information and shelf availability as of the time of submission.

If a single local holding is found, the Branch, Shelving Location, and Call Number will be displayed within the request and the Local ID will be pre-populated with the holdings information.

The request history indicates that the request matched a Direct Request profile and that the institution holds the item.

If multiple local holdings are found, you will be able to view the holdings information by clicking View Local Holdings.
You will then be able to specify a holding to Apply.

<table>
<thead>
<tr>
<th>Branch</th>
<th>Shelving Location</th>
<th>Call Number</th>
<th>Holdings Source</th>
<th>Availability Status</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marion Campus Library Stacks</td>
<td></td>
<td>PN4874 M88 B47 2003 v 1 c 2</td>
<td>OPAC</td>
<td>AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>Thompson Library Stacks 9th Floor</td>
<td></td>
<td>PN4874 M88 B47 2003 v 1</td>
<td>OPAC</td>
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<td></td>
</tr>
</tbody>
</table>

The local holdings information will be added automatically to the Local ID field and can be saved with the request.
From the Document Delivery queue, you'll be able to print a pull slip or book strap that includes the Local ID field by using the Print Now button or the Print Queue.

Pilot feature: Automatically update request after scanning the document

A number of libraries that use BSCAN or Scannx scanning software are needed to pilot test this scanner integration. If you are interested in this pilot testing, please contact OCLC Support (support@oclc.org) and a member of the Resource Sharing team will get back with you with further instructions.

Today many scanners allow you to scan a file to email, to a file, or to Article Exchange. With this enhancement, Article Exchange will update the Tipasa request with the URL and password if you have also scanned in the Request ID. You will be able to specify whether (1) the system will update the status of the request automatically and deliver the
document to the patron or (2) ILL staff will verify and update the status of the request to then deliver the document to the patron. This enhancement will be available for both lending and document delivery requests.

**Bug fixes and known issues**

The following issues have been fixed recently:

- Open Access links showing subscription links (November 28, 2017)
- Links for Google Books and OCLC Community Center (November 28, 2017)
- British Library purchase functionality (November 28, 2017)
- Display of International Lender field in Policies Directory (November 30, 2017)
- Problems related to library logo URL in Service Configuration and customized book straps (December 16, 2017)
- Tipasa only: Tags added for more statuses (December 16, 2017)
  - Received/In Use
  - Received But Missing
  - Received/In Use (Overdue)
  - Returned But Missing

Lists of current known issues and recently fixed issues can be found at

https://help.oclc.org/Resource_Sharing_known_issues

**Future releases**

Roadmap information is available at: OCLC Tipasa Community

**Important links**

**Product web site**

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

**Support website(s)**

- Training: https://help.oclc.org/Resource_Sharing/Tipasa/Training
- Documentation: https://help.oclc.org/Resource_Sharing/Tipasa
- OCLC Support

When calling OCLC Customer Support (U.S.), press option 7 to be directed to a 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

http://www.oclc.org/community/