Tipasa release notes for WMS libraries, June 2018

Release Date: June 30, 2018

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.

These items require immediate action or decisions.

<table>
<thead>
<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.</td>
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<tr>
<td>Tipasa and Circulation administrators should review policies and settings in Service Configuration related to integration.</td>
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<tr>
<td>Please review Set up integration for additional information.</td>
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<tr>
<td>If you need assistance setting up the new integration, contact OCLC Support.</td>
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<tr>
<td>Have you updated addresses in each of your borrower and lender Constant Data records? If not, please do so on</td>
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https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2018_Release_notes/085_Tip...
ACTION

behalf of all your borrowing and lending partners. Address labels do not print properly unless the addresses are formatted correctly.

Have there been any changes in your contact information or lending policies? If so, please make the appropriate updates in Policies Directory.

Share release notes with your colleagues.


Join us on July 11 for Product Insights: Resource Sharing. Register here:


New features and enhancements

This release introduces an enhanced integration between Tipasa and WorldShare Circulation. These optional features support workflow efficiencies for borrowing and lending and can be customized to best fit your library's local practices. Tipasa will update Circulation more often in the workflow with the information needed to improve both staff coordination and communication with your patrons.

Use enhanced Tipasa-WorldShare Circulation integration

Enhancements to borrowing workflow

You can now configure Tipasa-WorldShare Circulation integration to automatically update ILL requests in WorldShare Circulation at Shipped, Received, and Returned. This helps you better communicate with patrons and keep information consistent between Tipasa and WorldShare Circulation.

For complete details about the Tipasa and WorldShare Circulation integration, please see WorldShare Circulation Integration.

Integration for borrowers has been expanded to include:

- Automatic check-in when a loan request is updated to Returned status in Tipasa
- Assessment of patron bills when a copy or loan request is shipped by the lending library

For additional detail, please see Integration workflow, Borrowing workflow.

The following enhancements have been added:

- The creation of the temporary item and patron hold have been delayed until the request is updated to Received in
Tipasa. This will limit the amount of clean up needed in Circulation for unfilled, expired, or cancelled requests.

- New configuration options allow your library to choose where temporary items are located. Use of the WS ILL branch is no longer required.
- You can automatically use the lending library's item barcode for your temporary item (optional).
- Circulation now honors the Tipasa due date (with any patron offset) at check-out. The more restrictive of the Tipasa or Circulation policy dates will be used.
- Tipasa Request ID and/or lending library name displays in Circulation.

To learn more about configuring the integration, see Set up integration.

**New lending workflow integration**

You can now configure Tipasa-WorldShare Circulation integration to automatically update lending requests in WorldShare Circulation at Shipped and Completed.

For complete details about the Tipasa and WorldShare Circulation integration, please see WorldShare Circulation Integration.

Integration includes:

- Automatic check-out of the item from your local collection when responding Yes to a Tipasa loan request
  - Tipasa due date is always honored in Circulation.
- Automatic check-in of the item when the request is Checked-In/Complete in Tipasa
- Display of the Tipasa request ID and/or borrowing library name in Circulation
For additional detail, please see Integration workflow, Lending workflow.

To learn more about configuring the integration, please see Set up integration.

**Use enhanced purchase workflow**

The purchase workflow in Tipasa has been enhance to allow you to:

- Automatically route requests meeting specified criteria (e.g., format, year, patron status) to the new Review for Purchase queue

- Utilize additional options for changing the fulfillment type (e.g., return unpurchased item to borrowing workflow)

- Utilize request history for requests in the purchase workflow

- Access information in usage reports

- Communicate the status of purchase requests to patrons within in the patron interface

- View additional information for purchase requests
For additional detail about the purchasing workflow, please see Purchasing Requests.

Use integration with WorldShare Acquisitions

You can now submit ILL, document delivery, or purchase requests to WorldShare Acquisitions.

For complete details about the Tipasa and WorldShare Acquisitions workflow, please see WorldShare Acquisitions integration.

Receive email alerts when new lending requests arrive

For infrequent lenders, you can opt to receive an email alert when a new request arrives in the lending queue.

Please see New Lending Requests Email Notification for additional information.

Bug fixes and known issues

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

https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/Known_issues
Future releases

The following enhancements are planned for upcoming releases:

• Targeted for August 2018
  ◦ Optional retention of patron data on closed requests
  ◦ Delivery of files up to 120 MB in Article Exchange

• Targeted by the end of 2018
  ◦ Printing of book stickers for borrowing and document delivery requests
  ◦ Auto-population of local holdings and availability information for lending requests (pilot test)
  ◦ Ability to delete patron records in bulk

Roadmap information is available in the Tipasa Community.

Important links

Product web site

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

Support website(s)

Support information for Tipasa is available here:

• Training: https://help.oclc.org/Resource_Sharing/Tipasa/Training
• Documentation: https://help.oclc.org/Resource_Sharing/Tipasa
• Release Notes: https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues
• OCLC Support: https://www.oclc.org/support/contact-support.en.html

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

https://www.oclc.org/community/