Caution: Personally identifiable patron data now being purged based on Service Configuration setting

The length of time that patrons can access closed requests is now determined by the patron data retention period that you specify in Service Configuration for your institution. Please ensure that you've set this time period to meet the needs of your library or to match your institution's patron data policies.

This patron data retention setting also determines how long ILL staff can retrieve closed requests by searching on Patron Name or Patron ID. For more information, see Search for requests.

Introduction

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

- View complete citation when reviewing holdings
- Print book stickers for borrowing requests
- View local holdings and availability for lending requests (for WMS libraries)
- Automatically route requests to WorldShare Acquisitions (for WMS libraries)

Details for these and other new features and enhancements are provided below. Many of the enhancements in this release 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.
ACTION

We recommend that you clear your browser's cache before starting to work with Tipasa.

If this link to your library’s catalog has not been set up:

[Search my library's online catalog]

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]

If your library uses WorldShare Management Services (WMS), we encourage you to enable integrations with WorldShare Circulation and WorldShare Acquisitions.

[https://help.oclc.org/Resource_Sharing/Tipasa/WorldShare_Circulation_Integration]
[https://help.oclc.org/Resource_Sharing/Tipasa/WorldShare_Acquisitions_integration]

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

Follow-up actions

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

ACTION

Share these release notes with your colleagues.


Gather your team for the upcoming webinar Product Insights: Resource Sharing.

- Date: Wednesday, October 17, 2018, 2:00pm, Eastern Daylight Time (New York, GMT-05:00)
New features and enhancements

Utilize Direct Request for ISSNs without hyphen

Direct Request has been enhanced to match on ISSN when the hyphen is not included. This allows more borrowing requests to be produced without mediation, saving you time in submitting requests.

View complete citation when reviewing holdings

When choosing lenders for a copy request, you can now see the specific issue information at the top of the holdings page and as you scroll the list of holdings. The citation information was previously only available if you clicked the View Holdings link next to the OCLC number field. It's now also available when you click any magnifying glass.
For additional detail, see Create and edit requests.

Set a default copyright acknowledgement (for U.K., Australia, and New Zealand)

The Copyright Signature field has been added for borrower Constant Data records for Libraries in the U.K., Australia, and New Zealand. This will allow libraries in those countries to set a default value for copy requests.

For additional detail, see OCLC Service Configuration.

Print book stickers for borrowing requests

Book stickers have been added as a Borrowing print option, which allows you to print stickers to attach to reusable or paper book straps. You can:

- Print 6 per page and select the start position
• Specify default or customized template
• Preview your book sticker

For additional detail, see Printing for Borrowers.

**View local holdings and availability for lending requests (for WMS libraries)**

Local holdings and availability information are now automatically retrieved for lending requests to reduce clicks and save you time. The local holdings information is also saved with the request for inclusion on pull slips and book stickers to assist with pulling items for scanning and shipping.

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.

If multiple local holdings are found, you can view the list of holdings, select a specific holding, and apply the information to the Local ID field.

For additional detail, see Lending request detail.

Note: OPAC Integration has been enabled in Service Configuration for all WMS Tipasa libraries for both borrowing and lending. OPAC Integration for Tipasa libraries using other library systems will be included in future releases.
Include full shelving information on lending printouts

The lender book strap and book sticker templates have been improved. You can:

- Specify default or customized template
- Include Local ID field (e.g., location and call number)

For additional detail, see Printing for Lenders.

Incorporate Local ID in notifications

Local ID is now included in the list of inserts available for notifications. This allows you to include local shelving information in standard and custom email notifications sent to branch libraries for pulling items from their collections.
Automatically route requests to WorldShare Acquisitions (for WMS libraries)

Building on enhancements in the June 2018 release, you can now create a Direct Request profile to specify criteria (e.g., format, year, patron status) for automatically routing patron-initiated requests to WorldShare Acquisitions.

For requests that automatically route to Acquisitions, the Request History includes information about the profile match and indicates that the request was submitted to Acquisitions. The request moves to the On Order queue within Purchasing Requests.
For detail on the integration, see WorldShare Acquisitions integration.

**Bulk delete patron records**

You can now submit a file of patron records to be deleted in bulk via secure FTP. To learn more about how to bulk delete your library’s patron records:

- Play webinar recording (26 minutes)
- Review webinar PowerPoint (PDF file)
- See documentation for Patron Data Files

**Add privacy notice for staff and patrons**

If your library uses either LDAP or OCLC's Basic WorldShare authentication for Tipasa, you are now able to include a privacy notice during sign-in. This notice must be added to your configuration by OCLC. To request the addition of a notice, please contact OCLC Support (support@oclc.org).

For additional detail, see Add a privacy notice.

**Bug fixes**

The following bug fixes were included in this release:

- In Print Settings, institution logo "image fails validation"
- When creating multiple requests (e.g., for Book Clubs), "Field 'Lender String' cannot be empty"
- Automated notifications failed to be sent in some cases
- For WorldShare ILL Circulation integration, ILL hold displays as On Shelf before item arrives at pickup location
- For Tipasa Circulation integration, circulation due date doesn't match ILL due date
- Issues with Reasons for No reports

Current and fixed issues can be found at:

Known issues

Current known 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 targeted for upcoming releases:

- Add, edit, or delete staff notes
- Use Patron Summary to view patron info and notes at a glance
- Use Purchase tab to more easily review prices and link to vendor sites
- View Reprints Desk price and receive via Article Exchange
- Integrate Tipasa with Alma Circulation (NCIP)
- Utilize improved workflows for institutions with multiple locations
- Resubmit unfilled requests rather than create a new request

Roadmap information is available in the OCLC Community Center.

Important links

Post-release session

To help you become familiar with the new features, enhancements, and improvements included in this release, please attend the upcoming webinar Product Insights: Resource Sharing.

Date: Wednesday, October 17, 2018, 2:00pm, Eastern Daylight Time (New York, GMT-05:00)


Please note the session time zones 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.

Support websites

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

- Tipasa product website
- OCLC Community Center
- OCLC Support: When calling OCLC Customer Support (U.S.), press option 7 to be directed to a Tipasa Tier 1 Support Specialist.
• Browser compatibility chart