Introduction

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

- Use WorldShare Report Designer to build custom reports and data visualizations
- Print single book strap or sticker to use for both pull slip and shipping
- Store contacts to easily email library staff members

These enhancements, as well as additional improvements below, 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.

<table>
<thead>
<tr>
<th>ACTION</th>
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<tbody>
<tr>
<td>We recommend that you clear your browser’s cache before starting to work with Tipasa.</td>
</tr>
</tbody>
</table>

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

[Search my library’s online catalog](https://help.oclc.org/Resource_Sharing/Tipasa/Reference/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.

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

Note: OPAC integration has been turned on for all WMS libraries.

If your library uses 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 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/Configuration/Tipasa_Non-WMS_Circulation_Integration

If your library uses Sierra, we encourage you to enable OPAC integration for automatic retrieval of local holdings and availability information. Please contact OCLC Support to request these be enabled.

https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests#View_local_holdings_and_availability

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.

Have you signed up for email alerts for News in the Community Center? This will ensure that Tipasa release notes and events will come straight to your inbox.
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.

For more information, see the Tipasa Events.

New features and enhancements

Use WorldShare Report Designer to build custom reports and data visualizations

With Tipasa, you now have access to WorldShare Report Designer and your library’s ILL statistics through the Interlibrary Loan data universe. Report Designer offers you the ability to build custom reports, charts, and data visualizations.
visualizations.

To access Report Designer and the Interlibrary Loan data universe, navigate to the Analytics tab in WorldShare and click on Report Launch Pad:

You now also have access to the WorldShare Analytics community, where you can post discussions and enhancement requests related to Tipasa reporting:

For more information, see:

- Introduction to Report Designer for Tipasa Libraries webinar
- Tipasa Report Designer help

https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2019_release_notes/090_Tipa...
• Reports and Report Designer help: much of this documentation applies for Tipasa
• Tipasa Report Designer Office Hours
• Interlibrary Loan universe help

Print single book strap or sticker to use for both pull slip and shipping

You can now print book straps and stickers prior to marking a request as Shipped. This allows you to print the book strap or sticker and use it as a pull slip, saving you from creating two separate printouts.

Previously, this printing could only be done when batch moving requests from one Advanced Lending queue to another.

For more information, see Printing for Lenders.

Optionally receive alert when borrowing request reaches end of lender string

You can now elect to receive an email alert when a borrowing request reaches the end of the lender string. This allows infrequent borrowers to be notified via email that a request may need reprocessing.

These alerts can be set up by navigating to OCLC Service Configuration > WorldShare ILL > Interlibrary Loan Options:
Previously, you would have to sign in to the staff interface to determine if borrowing requests needed to be reprocessed.

For more information, see Interlibrary Loan Options.

Copy requests in the user portal

When a patron wants to request an item they've previously requested, they can copy that request from their list of requests in the user portal:

![Image of the user portal showing request copy feature]

Patrons also can copy requests from the Request Details:

![Image of the Request Details screen showing copy feature]

This allows patrons to re-request an item they still need or to request additional volumes of a previously-requested item without having to type the information into a new request form or re-discover the item. In the staff interface, this request will display as a new request with a new Request ID, but the verification field will indicate the request was copied from a

https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2019_release_notes/090_Tipa...
previous request and provide the previous Request ID.

For more information, see Requests.

**Store contacts to easily email library staff members**

**Set up contacts**

You now can configure and save email addresses for library staff members, for example, in Acquisitions or other groups in your library that you contact regularly. You also can associate a contact with a specific branch if your library has configured branches as WorldCat Registry locations.

To set up Contacts, navigate to OCLC Service Configuration > WorldShare ILL > Contacts. If your library is not using branch workflows, adding or editing a contact will require just the Name and Email Address:

![Contacts](https://example.com/contacts.png)

If your library is using branch workflows, you have the option to also select the branch for the contact:

![Contacts](https://example.com/contacts_with_branch.png)

Previously, contacts could not be saved so you needed to type or paste the email address into your email.

For more information, see Contacts.
Use new custom notification recipient type of BRANCH to create templates for branch locations

If your library has multiple locations, you can now quickly and easily identify the correct contacts and send an email to a branch location. For example, with a custom email template, you can request that the branch staff members send an item held at their branch to your main ILL office so you can fill a lending request.

Once you have created Contacts and associated them with branches, you can create new custom email notification templates to use in communicating with your branch locations. The new recipient type of BRANCH can be used when setting up these notifications. You may wish to create a new template that requests a branch send you requested items.

For more information, see Custom Notifications.

Request item retrieval from a branch location by email

Once your Contacts and Custom Notifications for branch locations are set up, you can easily email a retrieval request to the holding branch.

When you are in the Request Details and click the Email button, your templates and contacts for branch locations will appear in the drop-down menus. Once you select a branch-specific template, and there is only one contact associated with the holding branch, the To Email field will auto-populate with the contact:
If there is more than one contact associated with the holding branch, the contacts will be bolded and appear at the top of the drop-down list, followed by other email addresses in your Contacts.
Previously, contact information was available only within the request details so you needed to type or copy/paste email addresses for each email.

Documentation will be available shortly after release.

**Save branch pickup location to request**

With the April release, you gained the ability to configure pickup locations on the patron request forms to match WorldCat Registry branch locations. For more information, see [Configure pickup locations](#).

With this release, when a patron selects a pickup location and submits the request form...

...the User Portal will send the pickup location as *either* the Branch Location Registry ID or (if it is not associated with a Registry ID) the pickup location name. This information will stay with the request and be passed to the staff interface. It
will also be available for use with statistics.

This is helpful if you are a WMS library using WorldShare Circulation Integration, as it allows the patron’s accurate pickup location to be sent to circulation.

If your library is using branch workflows, it's recommended that you add the pickup location field to your patron request workforms and consider making it a required field.

For more information, see patron request workforms.

**Include patron pickup location in WorldShare Circulation temporary item (for WMS libraries)**

If you have turned on WorldShare Circulation integration, the pickup location can now be included in the Circulation temporary item. To set this up, you'll need to configure registry branch locations as pickup locations. When the requested item arrives, it can be checked into WorldShare Circulation and routed to the patron's chosen pickup location. The pickup location is included on the patron's hold list:

It is also available on the Edit Existing Hold Request screen:
Once the item is checked in, staff will be prompted to route the item to the pickup location:

For more information, see WorldShare Circulation Integration Workflow.

Create printouts in other languages

You can now print pull slips, book straps, and book stickers in any of the 10 supported languages. To change the language of the printout, select the language from the drop-down menu:
When printing from the print queue or clicking Print Now in a request, the printout will be translated into the selected language:
<table>
<thead>
<tr>
<th>ID LOCAL</th>
<th>TITRE</th>
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<tr>
<td></td>
<td>The Rand McNally book of favourite pastimes</td>
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<tr>
<th>AUTEUR</th>
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<td>Gridor, Dorothy; Watts, Mabel; Hunter, Virginia</td>
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<th>NOTE À L'USAGER</th>
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<td>Veuillez retourner à:</td>
<td>Veuillez retourner à:</td>
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<td>6565 Frantz Rd</td>
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<td>167485083</td>
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<td>Dublin, KS, US 43017</td>
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<tr>
<th>BIBLIOTHÈQUE EMPRUNTEUSE, RETOURNER À:</th>
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Previously, printouts were available only in English.

For more information, see Print.
Override the RapidILL holdings check

If your library is using RapidILL, you can now override the RapidILL holdings check and submit a request to RapidILL by entering RAPID in the lender string. This is useful when a holding is out of date and you do want to submit a request to other RapidILL libraries even though your RapidILL holdings indicate that you own the item. It's may also be useful if the item is missing or otherwise unavailable locally.

![Lending Libraries](image)

Previously, a request could end up in the unfilled queue with a message that your library holds the item and the request would need to be submitted to a non-RapidILL lender. Now, if you enter RAPID in the lender string, the system assumes you want the request to go to other RapidILL libraries for fulfillment.

For more information, see RapidILL.

Bug fixes

- The lender string now appears when requests are moved from Purchase back to Interlibrary Loan. Previously, moving a request from Purchase back to Interlibrary loan emptied the lender string.
- You can now place a Reprints Desk order when the ISSN does not contain a hyphen. Previously, trying to place a Reprints Desk order on a non-hyphenated ISSN resulted in an error message.
- The email alert for Article Exchange now contains the correct WorldShare URL for the borrower. Previously, the alert contained the lender's URL.

Known issues

Current known issues can be found here.

Future releases

The following enhancements are targeted for upcoming releases:

- Use RapidILL only for lending or only for borrowing
- Apply additional Reasons for No
- Provide patron notification that is specific to the pickup location
Important links

Post-release sessions

Product Insights: Resource Sharing
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, July 17, 2019, 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.

Report Designer Office Hours
Office hours for Report Designer will be held for Tipasa Libraries to answer questions and aid with reporting. Libraries are asked to post in-depth questions in the Office Hours discussion post in the Community Center ahead of time, so that OCLC staff can best prepare.

For more information, please see the Tipasa Events.

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