Tipasa Release Notes, June 2021

Release Date: June 20, 2021

Introduction

This release of Tipasa mostly focuses on laying the groundwork behind the scenes for future functionality. There is one improvement and one bug fix.

- Improve citation accuracy and streamline workflows with the new PMID lookup feature

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

It’s very important to clear your browser’s cache before starting to work with Tipasa!

If your library uses WorldShare Management Services (WMS), we encourage you to verify that your integrations with WorldShare Circulation and WorldShare Acquisitions are set up to best meet your needs.

https://help.oclc.org/Resource_Sharing/Tipasa/WorldShare_Circulation_Integration

https://help.oclc.org/Resource_Sharing/Tipasa/WorldShare_Acquisitions_integration

Note: Local holdings and availability (OPAC) integration has been turned on for all WMS libraries.
If your library uses Ex Libris 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 Innovative's 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

For all other library systems, if the link to your library’s catalog has not been set up 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

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 your contact information or lending policies changed? 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.

Register for upcoming presentations included in the OCLC Resource Sharing Conference 2021 Web Series.
During the COVID-19 crisis, review the information summarized in this News post:

- Managing your library’s ILL services during the COVID-19 crisis (Recording - 90 min, slides, notes for slides 70-81)
- Reason for No (RFN) = Preferred Delivery Time Not Possible (News post)
- Profiled Groups ACOV and BCOV and Days-To-Respond indicators (Video tutorial - 40 min, slides: office hour, slides)
- ILL professional development: Recorded webinars and on-demand training (News post)
- COVID-19 and OCLC Services Service Configuration cheat sheet

See also:

- A new ILL community-sourced map: Learn lending status and when to return ILL items
- Setting your Days To Respond for loan requests to 16 or 20 as a visual cue to borrowers
- New profiled group CCOV joins ACOV and BCOV
- Reopening your ILL operation: workflow and configuration suggestions
- Using Tipasa automation for mailing to patron’s homes
  - Using Tipasa automation for mailing to home based on patron type/status (PDF)
  - Using Tipasa automation for mailing to home "on demand" (PDF)

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

Have you familiarized yourself with the new reporting capabilities for Tipasa in WorldShare Report Designer?

An overview recording is available in the OCLC Community Center:
New features and enhancements

Improve citation accuracy and streamline workflows with the new PMID lookup feature

A new PubMed® unique identifier number (PMID) citation lookup feature is now available to libraries with WorldShare ILL or Tipasa. This feature improves citation accuracy and streamlines ILL workflows. Please note that this functionality was installed in an interim release and is currently available.

When a request includes a PMID, a magnifying glass displays next to that field in Request Details.

You can then click the magnifying glass to view citation details from PubMed’s database. If you wish to overwrite the existing information in the request with the PubMed citation details, click Apply and Save.

When you use automation, it’s even faster. Rather than clicking Send Request, choose Send to Automation so that the request will be matched to a bibliographic record and libraries holding the requested item. Along with the accurate PubMed citation information, the smart lender string built by automation will ensure that your library user gets the item.
even quicker.

For more, see Create and Edit Requests.

**Bug fixes**

You will now see the correct time to respond value in the time to respond column. Previously, when the request was submitted to the first lender in the lender string on a weekend, <12 appeared 24 hours early. Please note that this was a display issue and did not affect request aging.

For a list of current and recently fixed issues for Tipasa, see Known issues.

**Future releases**

Roadmap information is available in the OCLC Community Center.

**Important links**

**OCLC Resource Sharing Conference (RSC21) web series**

OCLC invites you to view the recordings of the presentations from the OCLC Resource Sharing Conference web series. This year’s series of six free, virtual sessions feature electronic document delivery, controlled digital lending, and moving resource sharing forward during this challenging time.

Each session is scheduled for 90 minutes and will include a 60-minute presentation followed by 30 minutes for Q&A and interactive discussion. (NOTE: The 30-minute discussions will not be recorded.)

RSC21 includes these sessions:

- **Tuesday, March 30, 1:00-2:30 pm** | “Page, scan, send, reshelve: A mobile scanning station for ILL electronic document delivery service”
- **Wednesday, April 28, 11:00 am-12:30 pm** | “ILL and the pandemic: Learning from the unexpected”
- **Wednesday, May 12, 1:00-2:30 pm** | “Renewing resource sharing in challenging times: Collaborating to meet library user needs and demonstrating the value of ILL services”
- **Tuesday, May 25, 1:00-2:30 pm** | “Managing resource sharing during COVID-19 pandemic: Experiences and impacts—three perspectives”
- **Thursday, June 10, 1:00-2:30 pm** | “Controlled digital lending in two private academic libraries: Same services with diverse tools”
- **Tuesday, June 15, 11:00 am-12:30 pm** | “A look at ILL into the future: An update on your ILL services”

Access to the recordings is available here.
Virtual Workshop Series: Learn how to fine-tune your ILL setup

Were you able to join us for all of our Virtual Workshops where we showed how you can optimize your library’s ILL setup and workflows, and save time?

The series included the following topics:

• Part 1: Fine-tune your policies and deflections (recording, slides, and checklist available)
• Part 2: Construct your custom holdings (recording, slides, and checklist available)
• Part 3: Automate your request process (recording, slides, and checklist available)
• Part 4: Curate and care for your constant data (recording, slides, and checklist available)
• Part 5: Make your usage statistics count (recording, slides, and checklist available)

Support websites

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

• Tipasa product website
• OCLC Community Center
• OCLC Support
• Browser compatibility chart