Tipasa release notes, May 2017

Release Date: May 14, 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.

Browser compatibility chart

Recommended actions

For this release, we recommend that you review the following checklist 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>
</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>Share release notes with your colleagues.</td>
</tr>
</tbody>
</table>

https://www.oclc.org/support/service...-notes.en.html
Workflow improvements

Send new borrowing requests manually through Direct Request

Direct Request automates processing of borrowing requests. With this release, library staff can now route newly created requests manually through Direct Request. This allows you to submit a request without selecting lenders on the holdings screen or applying constant data, provided your Direct Request profile is set to produce the request. Patron data is required for the request to be processed with Direct Request.

To manually send a request through Direct Request, first create the request by using Discover Items or the Create Request option. Both are available from the left-hand navigation.

Within Discover Items, a new Create Request button is provided on the search results page:

It is also provided on the bibliographic details page:
On the new request page, the Send Request option now has a down arrow with the new option to Send to Direct Request. Click this to submit the request manually to Direct Request.

If the request meets the requirements for your Direct Request profile(s), e.g., sufficient number of potential lenders, the request moves to the Direct Produced queue. If no potential lenders are identified, the request moves to New for Review.
Note: Send to Direct Request is not available for multiple-copy requests for book clubs.

Details on Direct Request are available in the Tipasa documentation

Prepopulate patron email address in custom notifications

When you select a custom notification to send manually to a patron, the patron’s email address now pre-populates automatically. If the email address is not supplied in the request, the email address from the patron record will be used.

Note that the recipient for the custom notification must be specified as Patron in service configuration.
An issue with custom email notifications being sent to patrons who had opted out of email notifications has also now been fixed with this release.

Details on custom notifications are available in the Tipasa documentation

Quickly verify citations in Google Scholar, Google Books, and Google

In borrowing and lending requests, you can now quickly search Google Scholar, Google Books, and Google to find complete citation information.

Within the request, you’ll now see three new search options.

The Google Scholar option uses article information provided in the request to find matches in Google Scholar. The Google Books option will attempt a title match in Google Books. The Google option uses information in the request to
search Google.

In Google Scholar, for example, you can use the Cite option and then copy/paste additional citation information into the request.

Details on Google search options are available in the Tipasa documentation.

**Deliver a document received by email to your patron via Article Exchange**

When you receive a document from a lender via email, you can now attach the document to the request and deliver the document to your patron via Article Exchange to the patron interface.

The OCLC Article Exchange option is now available for borrowing requests in In Transit status. To attach a document, click OCLC Article Exchange, specify the file to attach, and click Drop File.
166912146: British journal of ophthalmology.

Did you receive this item?

Date received: 04/22/2017
Options: Print Book Straps

Mark as received Not Received

Request Details (Request ID 166912146)

Source: WSILL
Status: In Transit
Lenders: NDOAG
URL Type: Article Exchange
URL: G200HA0812P.pdf
OCLC Article Exchange

Journal: British journal of ophthalmology.
Uniform Title: British journal of ophthalmology (Online)
Publisher: [London] : BMJ Pub. Group
ISSN: 1468-2079; 0007-1161
OCLC: 41962542

The file is uploaded to Article Exchange and the URL/Password is created.

URL Type: Article Exchange
URL: http://oc.lc/q33u3N
OCLC Article Exchange
Password: MVsUCmKs

Click Mark as received to update the request and deliver the document via the patron interface.
Details on Article Exchange are available in the Tipasa documentation.

Quickly obtain the copyright royalty fee for an article

When you’ve determined that you need to pay a copyright fee for borrowing an article, you can now more quickly determine that fee.

When you select the fee payment option, the number of pages is now automatically calculated by using the data in the Pages field and the fee is pre-populated with information obtained from the Copyright Clearance Center (CCC).

If the system cannot exactly match the title, you will be presented with multiple titles and you can select the appropriate one. If there is no match, you can click View copyright fees and permissions, which takes you to the CCC web site where you can determine the fee.

When you submit the request, the article fee is added to your queue of Copyright Titles.

Note: The Copyright Clearance accordion displays for copy requests only if Copyright functionality is enabled in Service Configuration.

Review and adjust copyright fees

The Manage Copyright queue now includes three sections.
• Copyright Titles lists the journal titles for which you’ve made copyright requests during the current calendar year.
• Copyright Fees Payable lists all the requests for which you’ve committed to pay fees. This was previously called Committed Payments.
• Payment Batches provides a history of the copyright fees you have previously paid.

On the Copyright Titles list, you can see the number of fair uses, planned payments, and other uses that you’ve recorded, as well as the total fees payable. The View link lets you look at the details for the title and edit the copyright status and fee for any requests that haven’t yet been paid.

<table>
<thead>
<tr>
<th>Copyright Title</th>
<th>ISSN</th>
<th>OCLC Number</th>
<th>Fair Use</th>
<th>Will Pay</th>
<th>Other</th>
<th>Total</th>
<th>Fees</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library journal</td>
<td>0363-0277</td>
<td>23615916</td>
<td></td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Library ion</td>
<td></td>
<td>64497288</td>
<td></td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Life</td>
<td>0024-3019</td>
<td>1843958</td>
<td></td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>$15.50</td>
<td></td>
</tr>
<tr>
<td>Lychnos</td>
<td>0076-1648</td>
<td>812932301</td>
<td></td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

The Export button allows you to export titles in comma-separated values (.csv) format. The Request Date drop-down lets you view requests created in a specific year. The Show drop-down menu provides filters that let you see just the titles marked with >5 total uses, >5 fair uses, or planned payments.

Note: The Manage Copyright queues display only if Copyright functionality is enabled in Service Configuration.

Details on copyright functionality are available in the [Tipasa documentation](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2017_Release_notes/095_201…).

Create a printout that can be used as both a pull slip and packing slip

For newly submitted lending requests, you can now save the due date and return address information. This allows you to print the due date and return address on the printout, which can be used as both the pull slip and the packing slip.
To create this printout, add the due date and return address information and save the request. Then use the Print Now button to create the printout or add the request to the Print Queue for batch printing.

The due date and return information are included on the printout.
Details on processing lending requests and printing are available in the Tipasa documentation.

**Known issues**

Several known issues have been corrected with this release:

- Electronic documents that were not sent via Article Exchange aren’t available to patrons online (see above)
- Message to clear copyright appears when submitting a request for a material older than five years
- Patron-initiated request filled via Article Exchange by an ILLiad lender sends the wrong notification
- Status/cancel button display issues in the user portal (for the most commonly encountered instances)

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

[Tipasa release notes and known issues](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2017_Release_notes/095_201…)

**Future releases**

Roadmap information is available at:

[OCLC Tipasa Community](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2017_Release_notes/095_201…)

Important links

Product website

More product information can be found at:


Support website(s)

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

- Browser compatibility chart
- Release notes
- Training
- Documentation
- 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/home.en.html

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