Learner Guide

Tipasa®

Lending workflows

Learning objectives

This course provides the basic skills needed to respond to lending requests in Tipasa. After completing this course, you will be able to decide how your library will use lending priorities and advanced lending workflows (verifying, retrieving, scanning, and packaging), and process lending requests for loans and copies in Can You Supply and Lending Priorities queues. This includes printing pull slips/packing slips with your call number, printing shipping labels for loan requests, and transmitting scanned copies via Article Exchange.

Suggested uses for Lending Priorities

Consider Lending Priorities if:
- Your library is a member of a consortium
- You need to give priority to in-state requests
- Your library has reciprocal agreements with other libraries
- You want to give special handling to requests from libraries that are on your courier service

Suggested uses for Advanced Lending Workflows

<table>
<thead>
<tr>
<th>If your ILL lending or document delivery operation has:</th>
<th>Consider these advanced lending workflows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Several full-time staff; several student or part-time workers</td>
<td>Verifying, Retrieving, Scanning, Packaging</td>
</tr>
<tr>
<td>One full-time staff; several student or part-time workers</td>
<td>Retrieving, Scanning, Packaging</td>
</tr>
<tr>
<td>One full-time staff; one student or part-time worker</td>
<td>Retrieving</td>
</tr>
<tr>
<td>One staff member who does all ILL lending activities or document delivery; no student or part-time worker</td>
<td>none</td>
</tr>
</tbody>
</table>

Things to know about Lending Priorities and Advanced Lending Workflows

- You can configure up to 5 priority lending queues
- Verifying, Retrieving, Scanning, and Packaging queues:
  - Requests move between these queues only as the result of staff action
  - Moving a request into one of these queues does not stop request aging or change Days to Respond
  - These queues are also available in Lending Priorities and Document Delivery, if enabled
Use Advanced Lending Workflows

- Process new lending requests using your regular workflow, incorporating use of the Verifying, Retrieving, Scanning, and Packaging queues as needed.
- You can use one, two, three, or all four of the Verifying, Retrieving, Scanning, and Packaging queues; and you can move requests among these queues in any order needed.
- You can move requests to these minor queues one at a time, or (in queues that support it) using batch response.
- To move an individual request to one of these minor queues, open the Actions menu by clicking the arrow, then click the appropriate Mark as response.

In queues that support batch response (indicated by ☰), click the appropriate response. For example:

<table>
<thead>
<tr>
<th>Batch respond to &quot;Can You Supply&quot; items</th>
<th>Yes</th>
<th>No</th>
<th>Considering</th>
<th>Verifying</th>
<th>Retrieving</th>
<th>Scanning</th>
<th>Packaging</th>
</tr>
</thead>
</table>

- Add requests to the list to be included in the batch using one of three methods:
  - Click the + next to the request
  - Scan the request ID barcode
  - Type the request ID
To complete the batch response, click the button (for example, **Retrieving**).

Documentation for configuring “Search my library’s online catalog” (for libraries not using WMS, Alma, or Sierra)

- Enable links to your library’s online catalog
- Add a link to your library’s OPAC

**For WMS libraries: To configure automatic holdings and availability lookup**

In OCLC Service Configuration, go to **WorldShare ILL > Advanced Workflows > OPAC Integration**. Set **Enable automatic local holdings lookup on lender assignment** to **On** and click **Save**.

**For Alma and Sierra libraries: To configure automatic holdings and availability lookup**

Contact [implementation@oclc.org](mailto:implementation@oclc.org)
**Example lending workflow**

At your library you will want to decide on optimal lending workflows based on many factors such as your library’s policies, number of staff and their responsibilities, volume of requests, and even what computer, printer, scanner, and barcode reader hardware is available.

- If your library uses WorldShare Circulation, you can set up integration between Tipasa and Circulation to automatically update loan requests in WorldShare Circulation when you respond Yes or Checked-in/Complete in Tipasa by following this [lending workflow](#).
- If your library uses Alma circulation, you can set up third-party Circulation integration between Tipasa and Alma to automatically update loan requests in Alma when you respond Yes or Checked-in/Complete in Tipasa by following this [Third-party Circulation integration Lending workflow](#).

Here is one example workflow that you can modify to fit your needs:

- For each request in a Lending Priorities or Can You Supply queue:
  - If your library does not use WMS, Alma, or Sierra:
    - Click *Search my library’s online catalog*
    - In your catalog, verify availability (and copy the call number)
    - On the request, paste the call number into the Local ID field
  - If your library uses WMS, Alma, or Sierra:
    - If you have one holding, the Local ID field should be pre-populated with location and call number. Verify Availability (under Local Holdings).
    - If you have more than one holding, click *View Local Holdings*. Select which holding to use and click the *Apply* button. This will populate the Local ID field with location and call number.
  - Add to Bookstrap/Sticker Print Queue
  - Click *Mark As Retrieving*
  - Click *Next Request*
  - If appropriate, respond No or Conditional

- Print the book straps or stickers
  - Open Print Queue > *Book Straps/Stickers*
  - Select book straps to print
  - Select format *2 per page*
  - Click *Print*
  - On the Print Preview screen, use the printer icon or links to print the book straps (appearance of Print Preview screen varies depending on your web browser)
  - Once you have confirmed your printing was successful, you can delete book straps from the print queue. Book straps stay in the print queue until they are removed.
  - Go back to the print queue, select the check boxes for the book straps you printed, and click *Remove*.

- Use the printed book straps to retrieve the requested items
For loan requests, Mark as Packaging. You can mark individual requests, or use batch processing. To use batch processing:
  o Open a Retrieving queue
  o Click Batch respond to “Can You Supply” items > Packaging
  o To add requests to the list, scan barcodes from the printed book straps OR Click + next to a request OR type the request ID
  o Click Packaging

For copy requests, Mark as Scanning. You can mark individual requests, or use batch processing. To use batch processing:
  o Open a Retrieving queue
  o Click Batch respond to “Can You Supply” items > Scanning
  o To add requests to the list, scan barcodes from the printed book straps OR Click + next to a request OR type the request ID
  o Click Scanning

Open a Packaging queue:
  o Click Batch respond to “Can You Supply” items > Yes
  o To add requests to the list, scan barcodes from the printed book straps OR Click + next to a request OR type the request ID
  o (Optional) Apply Constant Data
  o Select Print Shipping Labels option
  o Click Yes
  o Print shipping labels
    • Open Print Queue > Lending > Shipping Labels
    • Select requests for which you need shipping labels
    • Select format (6 or 30 per page)
    • Optional, when 6 per page is selected: Select check boxes to include the following on the labels:
      o Request ID barcode
      o LIBRARY MAIL DMM: 173.5.0
      o RETURN SERVICE REQUESTED
    • Select starting label position
    • Print the labels
  o Complete physical packaging of each item
  o Once you have confirmed your printing was successful, you can delete shipping labels from the print queue. Shipping labels stay in the print queue until they are removed.
  o Go back to the print queue, select the check boxes for the shipping labels you printed, and click Remove
• For requests in a Scanning queue:
  o Scan each article to a file on your computer. You may want to name the file using the request ID.
  o If you are using a Scannx or BSCAN scanner, you can automatically update the lending request after scanning the document. If you have configured the option to automatically move requests fulfilled using an Article-Exchange connected scanner to Shipped status, this eliminates the steps below. For more information, see the Scannx and BSCAN integration help and configuration help for Article Exchange connected scanners.
  o On the Tipasa home screen, Search for requests defaults to Request ID, with the cursor in the search box. Scan the Request ID barcode on the printed bookstrap
  o Click OCLC Article Exchange
  o Navigate to the scanned article on your computer, and click Open
  o Click Drop File
  o (Optional) Click Preview to confirm that you uploaded the correct article. When confirmed, click Done
  o (Optional) Apply Constant Data
  o Click Yes

Simulations and quiz
• Simulation: Enable advanced lending and lending priorities
• Simulation: Tipasa lending workflows
• Quiz: Advanced lending workflows

Documentation on printing requests, book straps/stickers, and labels
• Print requests
  o Watch a video (7:46 minutes)
• Printing for lenders
  o Watch a video (8:51 minutes)