Lending workflows

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Learning objectives

• Decide how you will use lending priorities and advanced lending workflows
• Process lending requests for loans and copies
• Print pull slips/packing slips and shipping labels
• Transmit scanned copies via Article Exchange
What are lending priorities & advanced lending?
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>VRSP</td>
</tr>
<tr>
<td>One full-time staff; several student or part-time workers</td>
<td>RSP</td>
</tr>
<tr>
<td>One full-time staff; one student or part-time worker</td>
<td>R</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>

Verifying, Retrieving, Scanning, Packaging
Things to know

- 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
Workflow for a loan request

Lender: Lending Priorities
Workflow for a loan request

<table>
<thead>
<tr>
<th>ID</th>
<th>Media Type</th>
<th>Title</th>
<th>Borrower</th>
<th>Time To Respond</th>
</tr>
</thead>
<tbody>
<tr>
<td>215122996</td>
<td></td>
<td>Women in American Indian society</td>
<td>TPV</td>
<td>&lt; 12 hours</td>
</tr>
<tr>
<td>215123001</td>
<td></td>
<td>Here on earth: a natural history of the planet</td>
<td>TPV</td>
<td>&lt; 12 hours</td>
</tr>
<tr>
<td>215191219</td>
<td></td>
<td>Social media tools and platforms in learning environments</td>
<td>TPU</td>
<td>&gt; 5 days</td>
</tr>
<tr>
<td>215191336</td>
<td></td>
<td>Human competence: engineering worthy performance</td>
<td>TPU</td>
<td>&gt; 5 days</td>
</tr>
</tbody>
</table>
Workflow for a loan request (with OPAC integration)

Lender:
1. Automatic catalog lookup shows availability (for a single holding)
2. And populates Local ID with location & call number
3. Add to Book Strap/Sticker Print Queue
4. Mark as Retrieving
Workflow for a loan request (with OPAC integration)

Lender: If multiple holdings, click **View Local Holdings**
Workflow for a loan request (with OPAC integration)

Lender: Select holding and click **Apply**
Workflow for a loan request (with OPAC integration)

Lender:
Local ID now populated with location and call number for selected holding
Workflow for a loan request (without OPAC integration)

Lender:
1. Search my library’s online catalog
2. In local catalog: Verify availability; Copy call number
3. Paste call number
4. Add to Book Strap/Sticker Print Queue
5. Mark as Retrieving
Workflow for a loan request

Lender (student worker):
1. Open Print Queue > Lending > Book Straps/Stickers
2. Select requests
3. Print
Workflow for a loan request

Lender (student worker):
1. Get books from shelf
2. Open retrieving queue
3. Scan request barcodes
4. Batch update to “Packaging”
Workflow for a loan request

Lender (another student worker):
1. Scan request barcode
2. Print shipping labels
3. Print book straps (if not previously printed)
4. Respond Yes
Workflow for a copy request

Lender: Lending Priorities
Workflow for a copy request

Lender (student worker): Click + to move request to Scanning queue
Workflow for a copy request

Lender: After scanning article, click Article Exchange
Workflow for a copy request

Lender: Attach article and Drop File
Workflow for a copy request

Lender:
- If necessary, Preview
- Click Yes
Simulation tips

In most web browsers, you can

• Press **Ctrl** and + to make the display bigger
• Press **Ctrl** and – to make the display smaller
Simulation tips
If you’re not sure what to do next, most simulation screens have a Hint button at the top.

Status is Available and location and call number populate Local ID field, so
- Add to Book
- Strap/Sticker print queue
- Mark as Retrieving
Lending workflows simulation

• If you are participating in a live online class
  • See clickable links in Webex chat panel
  • When you have finished the simulation, please click the smile reaction from the bottom of the screen
  • If you finish early, also try the Quiz
  • To open chat panel, click the button at the bottom right of the screen

• If you are viewing a recording
  • Pause the recording (use button at bottom of screen) to do the simulation and quiz
  • See clickable links in Webex chat panel
  • To open the chat panel, click the button in the upper right corner
Documentation and training

Or directly at
https://help.oclc.org/Resource_Sharing/Tipasa
Community Center

- Discussions with Tipasa users in other institutions
- News and events
- Search enhancement requests or contribute your own
Thank You!

When you exit from Webex, you will automatically be directed to an evaluation form:

- **Instructor:** Rick Newell
- **Class name:** Lending Workflows

Training questions (what’s covered in a class, etc.)?
Contact Rick Newell
newellr@oclc.org or 1.800.848.5878