Introduction to Tipasa®

Learning objectives

This course provides a high-level overview of Tipasa. After completing this course, you will be able to describe the major staff and patron features and functions of Tipasa and how they relate to common borrowing and lending workflows. This includes My Account, patron request workforms, automations, advanced lending workflows, lending priorities, copyright management, proven senders, document delivery, and notifications.

Training, documentation, and Community Center

Links are available within the Tipasa staff interface or

- Training and documentation: [https://help.oclc.org/Resource_Sharing/Tipasa](https://help.oclc.org/Resource_Sharing/Tipasa)
- Community Center: [https://www.oclc.org/community](https://www.oclc.org/community)

Smart fulfillment

OCLC recommends using smart fulfillment, including real-time availability for ILL, Automated Request Manager (ARM), and smart lender strings to make your borrowing and lending activities more efficient.

Prepare and plan

OCLC recommends reviewing your records in the OCLC Policies Directory, your constant data, and your Custom Holdings groups and paths. For more information, see Prepare and plan.
Tipasa® features related to interlibrary loan workflows

**Loan request**

- **Borrower**
  - New loan request

- **Lender**
  - Yes
  - Shipped/In Transit

- **Borrower**
  - Mark as received
  - Received/In Use

**Patron experience**

- Advanced lending workflows
- OPAC integration
- Lending priorities

**Borrower**

- Mark as received
- Returned

**Lender**

- Yes
- Shipped/In Transit

**Lender**

- Checked In/Complete
- Closed

**Copy request**

- **Borrower**
  - New copy request

- **Lender**
  - Yes
  - Shipped/In Transit

- **Borrower**
  - Mark as received
  - Closed

**Patron experience**

- Advanced lending workflows
- Lending priorities

**Borrower**

- Mark as received
- Returned

**Patron experience**

- Copyright management
- Advanced lending workflows
- Lending priorities

**Patron experience**

- Proven senders

**Document delivery**

- **Patron**
  - Creates request

- **Borrower**
  - Complete

**Patron experience**

- Advanced lending workflows
- OPAC integration
- Lending priorities

**Legend**

Tipasa features:
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Automatic system action
Sources for new requests

Patrons

My Account > Create request

Matches automation?

No → New for Review

Yes → Automation

Staff

Discover items

Build lender string (custom holdings via ARM or manually), or display holdings

Create request

Staff

(Borrowing requests) > Create request

Legend

Tipasa features
- Borrowing library staff action
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Patron submits request on patron workform

Assuming all available options are enabled

Matches automation that sends request to lenders?

No ➔ New for Review ➔ Borrowing library staff edits as needed & sends request

Yes ➔ Lending library fills request ➔ Proven Senders workflow, if applicable ➔ Borrowing library staff receive request, if applicable ➔ Patron receives appropriate notifications (and if applicable, article/link are in My Account)

Legend

Tipasa features
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Automatic system action
Configuration options for patron experience

Options:
- Require approval for new ILL patron accounts
- Allow patrons to renew requests online
- Allow patrons to cancel requests online
- Hide patron due date (to prevent inconsistency with circulation system), or display patron due date and optionally select number of days to offset patron’s due date
- Customize patron request workforms for:
  - Article
  - Book
  - Other
- Enable and customize notifications:
  - Borrowing library to patron
  - Document delivery library to patron

Legend

Tipasa features
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Automatic system action
Automations

**Borrowing automations**
- Choose from these actions:
  - Add tags
  - Apply constant data
  - Build lender string
  - Route request to:
    - Review
    - Document delivery, if held
    - Purchase
    - WMS Acquisitions
    - Lenders
- Based on match criteria:
  - Age of material
  - Material format
  - Languages
  - Need before date
  - Patron department
  - Patron note
  - Patron status
  - Patron will pay up to
  - Request type

**Lending automations**
- Choose from these actions:
  - Add tags
  - Apply constant data
- Based on match criteria:
  - Branch holding location
  - Shelving location
  - Custom holding group or profiled group membership of requesting library
  - Request type
  - Material format

**Legend**

- **Tipasa features**
  - Borrowing library staff action
  - Lending library staff action
  - Patron experience
  - Automatic system action
Advanced lending workflows

Legend

Tipasa features
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Automatic system action
Lending Priorities

Enable special queues for requests from priority borrowers
- Configure display name
- Filter by custom holdings group or profiled group

Legend

Tipasa features
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Automatic system action
Copyright management

Options:
- View copyright clearing in separate queue
- Clear patron-initiated requests for copyright automatically if they match titles used less than 5 times (with appropriate automation)

Published more than 5 years ago?
- Yes → Copyright clearance not required
- No → System matches to previously borrowed titles

- Staff marks as
  - Clear for fair use (CCG)
  - Clear with pending payment required (CCG)
    - Automatic cost look-up from CCC
  - Other
  - Or cancels request

Additional copyright management functions:
- View and export copyright information by title
- Edit copyright usage information
- Export data about payable copyright fees

Legend
- Tipasa features
  - Borrowing library staff action
  - Lending library staff action
  - Patron experience
  - Automatic system action
Proven senders

Based on a Custom Holdings Group

No staff intervention needed

Patron submits copy request that matches automation that sends request to lenders

Proven Sender responds Yes; uses Article Exchange

System updates status to In Transit

If IFM, system debits charge from borrower and credits to lender

System marks request as Received and updates status to Closed

Article Exchange link available to patron in My Account; automated message (if enabled) notifies patron

You can choose one of these options for Proven Senders:
- Include ALL lenders
- Include only lenders in a Custom Holdings Group
- Exclude only lenders in a Custom Holdings Group

Legend

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