Introduction to Tipasa®

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OCLC
Learning objectives

After this session, you should 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
• notifications
See Learner Guide
REQUEST LIFE CYCLE (BORROWING LIBRARY)
Life cycle for a loan request

Patron completes request form for a book
Life cycle for a loan request

Borrower: New for Review
# Life cycle for a loan request

- **Borrower:** New for Review

## Borrowing Requests: New For Review (8)

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Media Type</th>
<th>Title</th>
<th>Patron</th>
<th>Date Requested</th>
<th>Need Before</th>
<th>Tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>203424445</td>
<td>Not Reviewed</td>
<td></td>
<td>John Adams /</td>
<td>James, Jordan</td>
<td>06/25/20</td>
<td>07/24/20</td>
<td></td>
</tr>
<tr>
<td>203022935</td>
<td>Reviewed</td>
<td></td>
<td>IEEE journal of biomedical and health informatics</td>
<td>Kaufman, Kelly</td>
<td>05/13/20</td>
<td>07/25/20</td>
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</tr>
<tr>
<td>203022913</td>
<td>Reviewed</td>
<td></td>
<td>English journal</td>
<td>Lambert, Linda</td>
<td>05/13/20</td>
<td>07/25/20</td>
<td></td>
</tr>
</tbody>
</table>
Life cycle for a loan request

Borrower: Approve New Patron
Life cycle for a loan request

Borrower: Approve
New Patron
Life cycle for a loan request

Borrower (if ARM has built a smart lender string and applied constant data)
Life cycle for a loan request

Borrower:
- Search WorldCat if necessary
- Build lender string
- Apply constant data if appropriate
Life cycle for a loan request

Borrower: Results of WorldCat search
- Click title for more info
- OR select holdings manually
- OR apply Custom Holdings
Life cycle for a loan request

Borrower: Update request to apply lender string
Life cycle for a loan request

Borrower:
- Make any necessary edits
- Send Request
Life cycle for a loan request

Borrower: Book arrives in mail.
- Scan request barcode
- Print Book Straps/Stickers if needed
- Mark as Received
## Life cycle for a loan request

<table>
<thead>
<tr>
<th>Title</th>
<th>Submitted Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Adams</td>
<td>05/24/2022</td>
<td>Due 07/24/2022</td>
</tr>
<tr>
<td>David McCullough</td>
<td></td>
<td>Request Details: 208165676</td>
</tr>
<tr>
<td>Book</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The item you requested</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ILL Request Number: 203424445</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Title: John Adams</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Author: McCullough, David G</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publisher: New York: Simon &amp; Schuster, [2001]</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Patron: Request status updated in My Account; patron receives notification
Life cycle for a copy request

Patron completes request form for a journal article
Copy requests can be “automatic”

• If request matches an applicable automation…
• And a Proven Sender fills the request using Article Exchange…
• Then patron is notified and can access article in My Account
• Without intervention by borrowing library staff
Life cycle for a copy request

Article available in My Account; patron receives notification

<table>
<thead>
<tr>
<th>Title</th>
<th>Submitted Date</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance improvement quarterly.</td>
<td>05/25/20</td>
<td>Available to view</td>
<td>You have 5 views left. Link expires 06/24/20</td>
</tr>
</tbody>
</table>

Got tools? : the blended learning analysis and design expeditor
v45 n8 (Sept 2006): 26-30
Jim Elsenheimer
Tallahassee, FL : Learning Systems Institute, Florida State University in cooperation with the National Society for Performance & Instruction, ©1988-

Article
Life cycle for a Document Delivery request

Patron completes request form (in this example, for a book)
Life cycle for a Document Delivery request

Borrower: If request matches appropriate automation, it goes to Document Delivery queue
Life cycle for a Document Delivery request

Borrower: (optional): Use Advanced Lending queues
Life cycle for a Document Delivery request

Borrower: Mark as Complete
### Life cycle for a Document Delivery request

<table>
<thead>
<tr>
<th>Title</th>
<th>Submitted Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biophilic and bioclimatic architecture: analytical therapy for the next generation of passive sustainable architecture</td>
<td>06/25/2020</td>
<td>Complete</td>
</tr>
<tr>
<td>Amjad Almusaed</td>
<td>Request Details: 203426430</td>
<td></td>
</tr>
<tr>
<td>London; Springer, 2010</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Book*
REQUEST LIFE CYCLE
(LENDING LIBRARY)
Life cycle for a loan request

Lender: Lending Priorities
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 (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
Life cycle for a copy request

Lender: Lending Priorities
Life cycle for a copy request

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

Lender: Attach article and Drop File
Life cycle for a copy request

System generates URL and password; Lender clicks Yes
WRAP UP
Modernized staff interface (June 16)
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
Knowledge check

• Check your knowledge of Tipasa features (takes about 3 minutes)
• See chat panel for hyperlink
• To open chat panel:
  – If you are attending a live session: click the Chat button at the bottom right of the screen
  – If you are viewing a recording: click the button in the upper right corner
Thank You!

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

- **Instructor**: Rick Newell
- **Class name**: Introduction to Tipasa

Training questions (what’s covered in a class, etc.)?
Contact Rick Newell

[newellr@oclc.org](mailto:newellr@oclc.org) or 1.800.848.5878