So again, welcome everyone. My name is Rick Newell. I'm a senior product trainer at OCLC, which means that I spend my time designing and delivering training for Tipasa as well as several other OCLC products. And so the learning objectives for today's session are that after the session, you should be able to describe.

The major staff and Patron features and functions of Tipasa and also how they relate to common borrowing and lending workflows. So we're going to cover the Patron interface, my account, Patron Request work forms, automations, advanced lending workflows, lending priorities, copyright management.

Proven senders document delivery and notifications. That sounds like a lot and it is, but in this session, we're not going to go into detail on, how to set up or use any of these features. This session is more of a broad overview. We do have three more sessions this month, basically one each week for, for the next three weeks.

On lending workflows and copyright management and document delivery. So if you aren't signed up for those already or you may want to register for those. We also have a self paced borrowing course, which I will give the URL for during the course of the session. Also.

I'm going to put into chat a link to a learner guide, and you may already have access to this or printed it out from the email that I sent out earlier this morning or from the automatic reminder that Webex sends out, but it.
If you don't have it and you would like to have it during the session, you can access it at this URL and then you can print it if you want to.

So, what I would like to do 1st is relate to Tipasa features to interlibrary alone workflows. Some of you in the session today are from libraries that have been using Tipasa for a while and maybe you're new to the library or you need a refresher.

And some of you are implementing Tipasa for the 1st time this month, and so what I'm going to do is go to the learner guide, and this is the same URL that I just put into chat and.

What I would like to do is look at the, the workflows. So, you'll notice that in this chart we have, three workflows, one for loan request, one for copy request, and one for document delivery. And, the way this, the, the sort of the legend for this.

This chart is that things that the borrowing library staff does are in blue, things the lending library staff does are in yellow, things that the Patron does are in green, we don't see any on this page, but we will on some of the other pages, and things that the system does automatically behind the scenes are in gray. And.

The features that are specific to the Pasa that you won't find in WorldShare interlibrary alone are in a red font.
So some of you are upgrading or have upgraded from ILL, so these are features that are found only in, into Tipasa. So let's begin with the loan request workflow. So, it begins by a patron submitting a request, and there are three ways that a request can begin and.

**Rick Newell**

3:34
Tiasa. The most common one and kind of the default in Tipasa is for the patrons to submit a request in my account, which is the patron interface. And actually they usually begin a step before that. They usually begin by searching a database.

**Rick Newell**

3:49
Such as WorldCat discovery or any other database or discovery layer that your library has configured to send an open URL link to, to Pasa. And so the Patron searches the database, they find the item they want to request.

**Rick Newell**

4:06
And they click on an ILL button. When they do that, the Tipasa will accept that open URL and it will take them to a request work form, which your library has configured, and there are several different request forms, one for loans, one for copies et cetera.

**Rick Newell**

4:26
And the composite knows which one to select based on the bibliographic information in the record for the item they're requesting. And it will populate that form with the bibliographic information from the search that the Patron did. And, assuming the Patron signs in, it will also populate.

**Rick Newell**

4:46
Play that work form with the.
And their name library card number, and so on. All the patron has to do with that point is fill in any additional information that maybe applicable to your library or to the request, such as a pickup location if you have more than one or if, they have a specific need by date or if they're in.

**Rick Newell**  
5:08  
The notes they want to write to, to tell your staff some special details about the request. So once the, the Patron submits that form.

**Rick Newell**  
5:17  
That request may match an automation that your library has configured and I, I hope you all have or will, if you haven't already, configure automations. Automations can do several things. They can populate the lender string with lenders based on.

**Rick Newell**  
5:37  
Criteria that your library configures based on your custom holdings paths and groups, they can apply an appropriate constant data again based on criteria that your library configures, and then send the request to your new for review queue. However, if you feel brave, you can also have the automation send that.

**Rick Newell**  
5:57  
Requests directly to landing libraries again based on criteria that you have previously specified. So if it matches an automation.

**Rick Newell**  
6:05  
The automation will do whatever it's configured to do or if it doesn't match in automation, it will be in your new for review queue. So that's the most common way for a request to begin and to pause it. However, a staff can also create requests, so let's say, e.g., if the patron, calls on the phone or there's a a.
Transaction at the reference desk, staff can create a request by logging into the Tipasa staff interface and going to discover items to search for the item the patron needs, and then, you can build a lender string manually.

**Rick Newell**

6:43
Using custom holdings either via automation, ARM stands for Automated Request Manager or manually, applying custom holdings, and that's what we would, well 1st we would recommend applying custom holdings via automation or applying custom holdings manually, but you can also select.

**Rick Newell**

7:03
Libraries that you want to send the request to, based on holdings for that, that item and their policies. And then you create requests. You can also create a request from a blank work form. Now this is not very common, but let's say e.g. that you know a particular.

**Rick Newell**

7:23
Library has something such as a dissertation, even though they don't have holdings on in worldcap, you can create that request and send it to, to the library.

**Rick Newell**

7:33
So, let's talk a little bit about the Patron experience. We've already talked about the the patron experience as far as filling out the work form. There are many things you can configure in Tipasa. You can decide whether or not you want

**Rick Newell**

7:53
To require approval for new ILL patron accounts, most libraries will not turn this on, because most libraries, if you're migrating from Elliot or you have a link to your circulation system, you probably already have a file of patrons that you've already approved.

**Rick Newell**

8:13
However, that is an option, and if you turn that option on, the way it works is that if you receive an ILL request in the staff interface from a Patron who has not previously requested an ILL.

Rick Newell
8:25
You'll, you will be prompted to approve that patron, and you might decide whether to approve them based on your library's policies. Do they have overdue items? Do they have fines? Are they the right patron type if they're a community user or they're an alumni or a non resident?

Rick Newell
8:45
Maybe they don't qualify for ILL according to your library's policies. But again, most libraries will not choose to turn that feature on. You can also decide whether or not you want to allow patrons to request renewals online and whether you want to allow them to cancel requests online. If you turn those two off.

Rick Newell
9:05
Questions on, the renew and cancel buttons only displayed when are appropriate. So the renew button only displays for a loan request where a lending library has shipped the item, and the cancel button only displays if a lending library has not yet shipped the item.

Rick Newell
9:22
For due dates, you can choose to either hide or display the patron due date. So if you want to check, ILL items out to your patrons using your circulation system, you may choose to hide the patron due date in.

Rick Newell
9:37
My account so that there's not a, a conflict between your circulation system and Tipasa. If you do decide to display the patron due date, you can select a number of days to offset the patron's due date from one to five days. And so let's say that the lending library tells you it's due 30 June, you could.

Rick Newell
9:57
I have an offset of five days and the date with the that would displayed to the patron would be 25 June, which gives you time to, process the item and send it back to the landing library.

**Rick Newell**  
10:11  
I mentioned the Patron request work forms. There are three for article book, and other, and you can actually rename those anything you want, and you can customize which fields display to the patron, which fields are required, and how those fields are labeled. So there are some default labels for the field.

**Rick Newell**  
10:31  
In the work form, but if you don't like those labels, you can rename the field names to something that makes more sense to your patrons. There are also.

**Rick Newell**  
10:42  
Custom notifications that you can customize. There are borrowing library to patron notifications and document delivery library to patron notifications. Most of these can be configured to either be sent via email or text or both, and most of them can be configured to be.

**Rick Newell**  
11:02  
Sent either automatically or manually or both. What I mean by automatic is that they are. Or an item becoming due. You can also send them manually and.

**Rick Newell**  
11:20  
The way that works is that you open a request in the staff interface, click an email button, and choose the notification template you want to use. And then of course you can edit it before you send it. So there are about 20 or so, standard notifications. You can also configure up to 50.

**Rick Newell**  
11:40  
The Custom notifications. These are sent only manually and only.
Only via email, not via text, and basically they're just email templates that you can configure so that you don't have to, to type an email from scratch every time. So once you have.

Rick Newell
Has a number of features that they can use as well. So let's talk about that a little bit. So one of the features that the lending library can take advantage of is and there are four.

Minor queues or sub queues or indented queues, sometimes people call them that are part of the can you supply queue, and those four minor queues are verifying, retrieving, scanning, and packaging. So these are completely optional to use.

But if you do choose to use them, they're especially useful for perhaps somewhat larger libraries that have several people working in ILL, maybe you have student workers or maybe you have, part time staff or staff that maybe have less training, and you might have them do tasks such as.

You need to send to borrowing libraries. So what you can do is you can move a request into the retrieving queue and your staff that are going to do the.

And then assuming that another staff member is going to be doing the scanning for a copy request or packaging for a loan request, they can move that request into the scanning or packaging queue. And again, that lets the staff that do those particular tasks know that those are the requests that, that they need to work on. So you can use one.

Two, three or all four of these advanced landing workflows or you cannot use them at all if it doesn't make sense for your library.
Another feature that lending libraries could take advantage of is called lending priorities. And this enables you to give priority to certain groups of libraries. E.g., if you're in a consortium, you might have an agreement in your consortium to give priority to other consortia.

Members or you might have an agreement within your state to get priority to request from your state or you might get priority to libraries that you have reciprocal agreements with. So you can configure up to five different lending priorities groups, and then you can decide which library.

As you want in that group, and when you receive a new request as a landing library.

If it's from a library that you've designated as a priority borrower, it will be in your lending priorities queue as well as your regular canny supply queue. And again, this is just a way of, of helping you, process certain requests more quickly or with a higher priority.

Okay.

Another feature that lenders could take advantage of is OPAC integration. This is available for most, integrated library systems and what this does is, if you have this feature configured, when you receive a request in your Can You Supply queue or your lending priority.

queue, it will already be populated with your call number and location and the availability status. In fact, if:
The item is not available, then, Tipasa has the capability again for most ILS to deflect the request and send it onto the next lender. However, if it is available, Tipasa will populate the request with your location, call number and availability so that you don't have to.

Manually look that up. You can just print out a pull slip, a bookstrap or sticker or the full request if you choose, and.

And go to the shelves and retrieve it. So once the lending library has found the item and shipped it, they update the request status to yes, and the status changes to shipped in transit. As a borrowing library, you mark it as received and we've already talked about the patron experience.

But, what could happen is that, if you have configured an automatic notification, when you mark it as received, it could trigger a notification to the patron saying the item you requested is available, please come pick it up with whatever instructions you configure in that notification.

When your patron is finished with the item, they will return it to you. You will mark it as returned and ship it back to the landing library. When the lending library receives it back, they will, update the status to checked in, complete, and the status will become closed.

For copy requests, the process is, in some ways simpler, in some ways more complicated. It's simpler because, of course, there's not a returnable item. Once you receive the item, the transaction is finished. However, of course, for copy requests, you.
17:13
You have to consider copyright management. So the same, sources for beginning a request and the same experience we've already talked about applied a copy request, but there's some features in Tipasa that help you manage copyright.

Rick Newell
17:29
One of those options is that you can view copyright clearing in a separate queue if you, if you choose to. So if there are one or two people in your library that are responsible for making copyright decisions and monitoring copyright compliance, any, requests that require that decision from you.

Rick Newell
17:49
Will be in a, a copyright queue as well as in your, in your regular new for review queue.

Rick Newell
17:54
And that just gives a way of the person that's responsible for monitoring copyright, a queue of their own, so to speak, where, they can work on those requests that they need to, to pay attention to. You can also clear patron initiated requests for copyright automatically if they.

Rick Newell
18:14
Match titles used less than five times, that's a lot of words. What it means is that.

Rick Newell
18:20
If you. And, that item that Patron is requesting is published within the last five years and you've requested from that journal a fewer than five.

Rick Newell
18:40
Five times during this calendar year, that's a possible automatically.
Automatically clear copyright. So, of course, if the item being requested was published more than five years ago, that would fall under a copyright law and copyright clearance is not required. So, that.

**Rick Newell**
19:01
That request would not be in your separate copyright queue. If the item was published within the last five years, Tipasa will attempt to match to previously. So each library that useless Tipasa has a copyright table which you can view. And if it matches the, the current.

**Rick Newell**
19:21
That are being requested matches an item in that copyright table to possible tell you how many times you've used that this year, and, you can mark it as clear for fair use CCG or if you've already used it five times or more, you might choose to choose the option clear with pending.

**Rick Newell**
19:41
Payment required. If you choose that option Tipasa will automatically look up the cost from the copyright Clearance Center website and tell you what the cost would be and display that information in the request, and then you can decide to proceed or not. If you decide to proceed.

**Rick Newell**
20:00
Tipasa will keep a running total of, of the copyright fees that you owe, and, there are some reports that you can access at any time you choose that will assist you in, in making copyright royalty payments to copyright clearance center or however you choose to do that. You also have.

**Rick Newell**
20:20
The option.

**Rick Newell**
20:22
To mark it as other if decide to buy the article from the publisher, or a vendor that includes in their fee, not only the fee for their service, but the copyright royalties that are due to the copyright holder, you might choose to mark other or you might choose to cancel the request.
And we go into much more detail about this in our copyright training session that's coming up in a couple of weeks. As I mentioned, each library that uses to Passa has a, a copyright table which you can view. You can also export that information by title. You can edit that copyright usage information for instance.

Example if you marked something as payment required and it should have been fair use or if you marked something as CCL and it should have been CCG or the other way around, you can edit that copyright usage information before you generate the reports. And, there's also a report where you can export data.

on payable copyright fees.

So the, same, lender options that we've already talked about apply when the lender receives that, that request, and that includes advanced lending workflows that verifying and retrieving scanning and packaging, and the lending priorities where you can give priority to, certain groups of libraries. So.

When the lender fills that request, they will most likely fill that request via article exchange, which is an electronic way of transmitting copy requests, and when they update the status to yes, the status becomes shipped and in transit.

And so when you receive it as a borrowing library, you will mark it as received, and that triggers a couple of actions. One is that if you have a notification configured, the Patron will receive that notification saying the item is available, and also the article will be.
Available to them in my account when they log in. However, there's a really cool, thing that, you can do with.

Just realized I don't think I didn't talk about proven centers. This is what I wanted to go to. Proven senders, is a way that you can, kind of automate this process. So, if you have certain libraries that you know from experience.

Have the history of sending the, the right article and a good quality scan, all the pages et cetera, then.

Whenever a Patron submits a copy request that matches an automation, that sends a request to lenders or when a borrowing library staff submits a copy request, when the lending library responds yes, assuming they use article exchange, all these things that you see in gray are things that happen automatically behind the scenes.

Means. The system up.

The Status to in transit temporarily, and if IFM (Interlibrary loan Fee Management) is involved, in other words, the lending library is charging you a fee as a borrowing library, then, IFM is taken care of automatically, the system debits the charge from the borrowing library and credits.
the charge to the lending library, and then the system marks the request as received and updates
the status to closed, and more importantly, the article exchange link is immediately available to
the patron in my account, and assuming you've configured an automation, an automated
message, the Patron will be notified that it's available.

Rick Newell
24:14
And what this does is it, it enables patrons to get their, their requested items much more quickly.
It doesn't have to wait for library staff to manually update the status to received. So, let's say that.

Rick Newell
24:29
Your, patron submits a request, let's say Friday afternoon, and by that time your ILL staff has
already gone home for the weekend, but it's filled by a library that, that is still working at that
time of day. And as soon as they fill the request, if you have.

Rick Newell
24:49
designated the library as a Proven Sender, the Patron can access their article rather than having to
wait until Monday when your ILL staff is, is back in the office again.

Rick Newell
25:01
Tipasa also has a feature called document delivery, and this is where, you are supplying
materials to your patrons from your collection, and your collection could include things you have
in your physical collection as well as, electronic.

Rick Newell
25:21
items that your library licenses or that are open access, e.g.. And so when the patron submits a
request, they may think it's something that your library doesn't have and if they knew that, they
could probably find it themselves without submitting an ILL request. But, if they do submit an
ILL.

Rick Newell
25:41
Request and you determine that your library actually has it, you don't need to obtain it from another library. You can change that fulfillment type to document delivery and you can take advantage of automations and.

Rick Newell
25:56
You can take advantage of, I should say automated notifications and you can let the patron know the item is available. So you can supply a URL, e.g., for an open access item or for an item that your library has licensed, and it gives you an easy way to.

Rick Newell
26:16
To supply these materials to patrons. So even if you don't have and aren't planning to have a service that you call document delivery, you may want to turn this feature on anyway. Some of you do have such a service where you will ship items to faculty offices or.

Rick Newell
26:36
Deliver to faculty offices or if you're a public library, maybe you have patrons that don't live near a library branch and you, you are going to ship it to their home, document delivery gives you a way of, of managing that.

Rick Newell
26:52
So let's look through this list and see what we've forgotten. One of the things we haven't really talked about yet is, this is kind of a summary, is a request workflow. So as I mentioned, assuming all available options are enabled, let's say that Patron submits a request on the Patron work form. If that matches a request.

Rick Newell
27:12
Automatically sends the request to lending libraries, then, the lending library will fill the request.
If it's a copy request, if you have enabled proven senders, then, you can skip that next step barring library staff receive the request. If it's not a, a proven sender or if it's a loan request rather than a copy request, you as the barring library staff.

**Rick Newell**
27:38
Would mark the request received and the patron would receive the appropriate notifications. And if it's.

**Rick Newell**
27:46
Copy request or an electronic item, the article or link would be available to the patron in my, in my account. If the request does not match an automation that sends the request to lenders, then it will show up in your new for review queue, and you as the barring library staff would edit the.

**Rick Newell**
28:06
Request is needed and send the request and then all of the steps that we just talked about would, would happen as well.

**Rick Newell**
28:12
I also want to talk briefly about automations. We highly recommend using automations. They can save you a lot of time and they can, do some things that are difficult or impossible to do if you do things manually. So for borrowing automations, you can choose to apply tags which are.

**Rick Newell**
28:32
kind of like staff notes, but they're, they're somewhat more visible and they are also searchable as are staff notes. You can also apply constant data. Some libraries have fairly complicated policies for.

**Rick Newell**
28:53
which libraries they want to send a request to, based on the patron type and the material type, et cetera, and you can apply the constant data appropriately by configuring an automation. You can have the automations build a lender string.
We strongly recommend using automations to build a lender string rather than building them manually because, the automation could take advantage of real time availability and, the turnaround time that is not.

Not easily accessible if you do this manually, and so you can have automations build the lender string and save it to your new for review queue. But you can also have the automation send the request to lending libraries, again based on criteria that you have specified.

Or if it's something that your library holds, automations can route the request to your document delivery queue or if you're a WMS library, you can wrap the request to WMS acquisitions. If it's not something that you hold and it meets criteria that you specified, you can write it to WMS WMS acquisitions.

Even if you're not a WMS library, you can route it to a purchase queue where you can manually, communicate with your, with your acquisitions department. And the criteria that I've been mentioning that you can use are the age the material, what year was it published. Material format, the language of the item, the patron’s need before.

date, the patron's department or status, which is patron type, any notes the patron has written, if, e.g., the patron has written any kind of note, you may want to see that, the maximum cost that the patron has specified or request type loaner copy.

They're also, lending automations and lending automations can do two things. They can add tags and they can apply constant data. And again, lending libraries sometimes have complicated rules
for which libraries they charge and how much they charge based on things like the material format, the request time.

**Rick Newell**

31:08
Type, which library it is, whether they're in a custom holdings group or a profile group, they could also apply different constant data based on the branch and shoveling location where that item lives. So just a couple of other things I wanted to mention about the.

**Rick Newell**

31:27
The features and then we'll look at some typical workflows. I already talked about tags and staff notes and automations. You can also export, most lists of of requests and most queues.

**Rick Newell**

31:46
And there are also reports available through OCLC usage statistics. Those of you that have used Iliad or World Share ILL are probably used to those, but as a Toposa library, you also have access to Worldshare Reports and Worldshare report designer where you can generate custom reports.

**Rick Newell**

32:06
That you design. So what questions do you have about.

**Rick Newell**

32:11
The typical workflows related to depositeive features. Remember you can send any questions you may have in chat. While you're doing that, I'm going to.

**Rick Newell**

32:27
Go to the next slide. So I'm gonna talk a little bit about the request life cycle. 1st we'll look at it from the borrowing library perspective, and then from the lending library perspective. So for the borrowing library, 1st we'll look at loan request and then a copy request. So.
As we talked about earlier, the request usually begins when the Patrick completes a request form. In this example for a book, and remember that the Patrick usually begins their request by searching a database such as WorldCat discovery. And they click on the ILL button, and then there are.

**Rick Newell**

33:08
Brought to this form, which is populated with the bill of graphic information.

**Rick Newell**

33:12
As well as their patron information such as their name, email, library card number et cetera. This form is very customizable. In this case, the patron was requesting a book, so the patron knew to, excuse me, the system knew to, to fill out the, the book form, and.

**Rick Newell**

33:32
Populated the form with the bill of graphic information such as the title, publisher date, and so on.

**Rick Newell**

33:38
And notice that some of these fields have an asterisk, which means that's a required field. You can decide which fields are required, which fields display and how they're labeled. So e.g., rather than calling this field patron ID or library card number.

**Rick Newell**

33:54
You could call it whatever makes sense for your library, in this case bronco ID. So the Patron adds in any additional information such as any notes or need before day or pickup location, and you could configure a list of pickup locations that are applicable to your library if you have more than one.
And then, assuming that, this does not match in automation that sends it directly to landing libraries. As a staff member, you will see the request in your new for review queue. And so you open your new for review queue.

**Rick Newell**
34:28
And that displays a list of requests in that queue, and then you click the request ID or the title of the request you want to work with, and if automation, automated request manager, has built a smart lender string and applied constant data, notice that this lender string is already populated.

**Rick Newell**
34:48
Based on criteria that your library has specified and based on your custom holdings paths and groups, and.

**Rick Newell**
34:56
And it will also apply a constant data, which supplies information such as your shipping address, and you'll notice that this particular example has an automation history. So this is telling you that it require it matched not automation that's called loan, and.

**Rick Newell**
35:16
Several libraries deflected automatically due to either the request type or the format type. Produced option off means that, in this automation, your library has chosen.

**Rick Newell**
35:27
Not to automatically send it to lending libraries. So in most cases you do not need to search Worldcap because automations, automatically choose the best worldcap record based on, holdings and information in the request.

**Rick Newell**
35:47
However, if he has some reason to believe that the request is not matched to the best Worldcap record.
You can search WorldCat, and you can do that by clicking the magnifying glass next to the title or the ISPN e.g.. You can build a lender string manually either by applying custom holdings or by selecting from a list of libraries that hold the item, and you can apply constant data if.

That has not already been applied.

If you do do a worldcast search, once you, find the, the record that you feel is the best match, you can click the title for more information. You can select holdings manually by choosing holdings in your state holdings in your region, which is your state and adjacent states or.

All holdings.

Or you can apply custom holdings, which would, be the preferred, more efficient method, and then you update the request to apply that lender string that you have built, make any edits that are necessary, add any notes or maximum costs et cetera, and then send the request.

If all goes well, a day or two or a week or so later, the book will arrive in the mail or courier service or however the landing library ships it, probably the lending library will have included some paperwork with that item, either a bookstrap or sticker or the full request and.

But that paperwork will have.
The request ID in the form of a barcode, one way that you could easily process this item that you just received just is to scan that request ID barcode, update the status to received, even though the lending library has probably included a bookstrapper sticker, you may want to print your own, which has more information for your pay term.

Rick Newell

And then mark it as received. When you do that, the request status is updated into my account. Notice that it has a due date and this library has chosen to enable the renew button so the patient could request renewal. Excuse me, and if you have configured.

Rick Newell

Automated notifications.

Rick Newell

The pager will automatically receive that notification with, information from the request such as bill of graphic information, other information that you have configured in the notice such as, your library contact information, the due date, again, based on if.

Rick Newell

Information in the request. And, so that, that can save you a lot of time.

Rick Newell

For a copy request, the patron, still completes a request form, and again, most of the bill of graphic information, including the information such as the article author and title, the, the volume, date pages and so on will already be populated. However, the Patron can also complete a request form.

Rick Newell

Manually, so let's say they did not do a search of a database. Instead they are working from a bibliography or a citation that someone gave them.
Rick Newell
38:56
They can manually type that information into the request work form. And again, this request work form is very customizable, you can decide which fields display, which fields are required and how those fields are labeled. And remember the copy requests can be automatic if, you have automations can.

Rick Newell
39:16
Figured and this copy of request matches the criteria in the automation and that request is filled by a library that you've designated as a proven sender, in other words, a library that you trust to send the right article, good quality scan, et cetera, and they use article exchange, then as soon as the lending library updates the status.

Rick Newell
39:36
Yes.

Rick Newell
39:37
The patron is notified and they can access the article in my account, excuse me, all without any intervention by the borrowing library staff. And this is what it would look like to the patron. They would log into my account and click that available to view link and they could, download their article or print it or whatever the.

Rick Newell
39:57
Yeah.

Rick Newell
40:00
For a document delivery request, the same work forms are actually used for document delivery and inner library loan. Chances are that Patron doesn't know and maybe doesn't even care whether the request is going to be fulfilled by something you obtained from another library or something that's actually available.
From your own library. So they complete the request work form. In this example, it's for a book.

Okay, if the request matches an appropriate automation and you have your holdings up to date in WorldCat or in the WorldCat knowledge base, if it's an electronic item, the request can automatically be routed to your document delivery queue rather than your new for review queue. And you can manually change.

Still fulfillment type, you can change it from document delivery to ILL or from ILL to document delivery based on, information that you have.

Because for a document delivery request, you are in a sense acting as both the borrowing and lending library because you're supplying the material from your own collection, you can use those advanced lending queues. You can mark it as retrieving or packaging or scanning if you want to. It's not required.

When you mark it as complete, the patron will be notified that the item is available, or if it's a copy request, the item would be available in there, my account. And this was as an example of what it might look like for.

A book request.
So that was a whirlwind tour of the request life cycle from the perspective of the borrowing library, but now let's look at it from the perspective of the lending library. So assuming that the request is from a library that you have designated as a priority borrower, in other words, a library that you want to give priority to. This library.

**Rick Newell**

42:00

Has, it's a member of a consortium called the Capital City Consortium and.

**Rick Newell**

42:10

Here's an example of the OPAC integration that I was talking about earlier, and again this is available for most integrated library systems.

**Rick Newell**

42:27

Assuming that you have one, one holding, let's say one copy of this item in, in one branch, the automatic catalog lookup will show the availability. So in this case it says available it was checked four days ago, and it will populate this local ID field with the location and call number. The reason that's useful is that.

**Rick Newell**

42:47

You can then add this to the bookstrapper sticker print queue, and you can use that bookstrapper sticker as both a pull slip to retrieve the item from the shelves as well as to send with the item to the borrowing library to give the information like the request ID, etc. And, so you can add.

**Rick Newell**

43:07

Get to the bookstrap sticker print queue to print later, and you can also add it to the mark as retrieving or I should say you can mark it as retrieving to add it to the retrieving queue.

**Rick Newell**

43:17

If you don't have OPAC integration configured or you have one of the few ILSS for which that's not available, you can still search your library's catalog, and so, this assumes that you have a configured service configuration to tell Tipasa how to search your.
Catalog, so you click that search my library's online catalog link, your catalog will open in a separate browser tab or window. You can verify the availability and manually copy and paste that call number into that local ID field and then add it to the bookstrap sticker print queue, and then.

Mark is retrieving if you choose to.

So assuming that a student worker or your assistant is going to retrieve these items from Michelle's, you've added those, those requests to the bookstrapper sticker print queue so they can open that print queue for lending, select the request.

They want to print and then, click the print button.

And then, this is an example of the bookstrap. Notice the bookstrap has the request ID both in an unreadable form and in the form of a barcode, and it has that local ID field with the location and call number. It also has the bibliographic information such as the title and author.

So the student worker will use that, that slip to get the items from the shelves, and then one way that they could proceed is they could open that retrieving queue and scan those request ID barcodes.
In order to batch update those requests they just retrieved to the packaging queue. And if another
person is going to be doing the, the physical packaging, they could again scan that request ID
barcode and they could.

**Rick Newell**
45:15
Choose the option to print shipping labels. If the bookstraps were not previously printed, they
could, to print bookstraps or stickers and respond yes. And then they would complete the
physical packaging and take the item to the mail room.

**Rick Newell**
45:32
For a copy request, again, this example shows an example where the request comes from a
library that the lending library has a designated as a priority borrower. So, kind of the same
things apply. You can use those bookstraps or stickers or you can print full.

**Rick Newell**
45:52
Requests to retrieve the items that need to be scanned from the stacks, and then after you've
scanned the article.

**Rick Newell**
45:58
And saved it somewhere on your computer, you can click OCLC article exchange, and then you
navigate to wherever you have saved that on your computer, and you, click that drop file button.
And a lot of libraries like to use the request ID as the file name when they.

**Rick Newell**
46:18
When they save that scan to their computer. So you drop file, that's what attaches that, that scan
file to the request.

**Rick Newell**
46:28
And, the system generates a URL and a password, which is the lending library you don't really
care about, but the patron of the borrowing library can use that information to access their article.
You can preview the, the URL and password basically. Well, you actually preview the article to be sure that you attach.

Rick Newell
46:48
It's the right one. Most of the time you don't need to do that, you would just respond yes, and at that point as the lending library, you are finished.

Rick Newell
46:58
So what questions do you have about that, that workflow or the life cycle of a request I should say? Pause a minute to give you a chance to type any questions that you have into chat or.

Rick Newell
47:18
Going to unmute your microphone.

Rick Newell
47:25
Want to let you know that there is a toposa release later this month. It's scheduled for 16 June and you may have read about this modernized staff interface. Those of you that are WMS libraries may have read or heard about this for circulation. It's also going to apply to.

Rick Newell
47:45
Awesome.

Rick Newell
47:45
It's not going to change any functionality, so all of the functionality that we discussed in this session will still, will still work the same way, but the the interface is, is refreshed, it looks a little more modern and, uses different fonts, e.g., hopefully is a little bit easier.

Rick Newell
48:05
To navigate. So, don't, don't be shocked when you, when you log in after 16 June and see something looks slightly different. Still.
Rick Newell
48:13
The same Tipasa but but it's modernized a little bit. I also want to remind you about documentation and training that's available, and you can of course access that directly from a URL, which you can.

Rick Newell
48:29
Her favorite, but it's also available from the need help menu within the toposa staff interface, and I'm actually gonna go to, the Toposa staff interface, so I'm going to click on need help and you'll notice this interface looks a little slightly different than that screenshot that I showed you that's that's got.

Rick Newell
48:49
Coming 16 June, but if you go to the need help menu and click General help.

Rick Newell
48:53
The way that you navigate to to the Tipasa help is to click resource sharing, and then Tipasa. And I just want to point out a couple of things that are not especially obvious. One is that some of these, these categories as they're called these the.

Rick Newell
49:13
These boxes, is that you see that there are several, sub options listed. What's not quite so obvious is that some of them have this, this ellipsis, these three dots in a very faint gray font. And if you click that, that will display the rest of the items in that, that category.

Rick Newell
49:32
So keep that in mind. I also I wanted to tell you that let's say that you are interested in, let's see, what's a good topic? Let's say you're interested in smart fulfillment. If you click on automated record.

Rick Newell
Request manager, if you want to print any, any topic in help, there is this PDF icon in the upper right corner of almost every page, and that will enable you to export the page as a PDF file and then you can print it.

Rick Newell
50:09
I also want to point out a couple of other things in the help, so I'm going to scroll down to, a couple of things.

Rick Newell
50:29
Yeah, there's a question in chat about world share reports. So, let me access this help. So, there are three, what are called standard reports for, Tipasa, and those apply to document delivery, and those are the.

Rick Newell
50:49
The document delivery activity overview, request detail, and request statistics. So if I click this, it will show me a sample of that.

Rick Newell
50:58
Report, actually I have to click one more time. Here's a sample of that document delivery request detail. So with these reports that there are only three of them so far, you, you just give it information such as the starting and ending day or material.

Rick Newell
51:18
E.g.. However, there are also.

Rick Newell
51:26
World share report designer, actually that's not what I wanted to click on, let me go, resource sharing, and then to pop.
And then, ports, and I'm gonna click on wheelchair report designer for Tipasa. So.

Rick Newell
52:07
One of the things that you, you could do is, that there's a video, it's about 7 min long creating a report from the ILL universe, and, you might use that e.g. to generate a reasons for NO report. There's also a reasons for NO report, of.

Rick Newell
52:27
Available from OCLC usage usage statistics, but, another example of something you could do when you design a custom report is you could, use this for collection of development purposes. So you could see what what titles are most requested and.

Rick Newell
52:47
And eh, you know, if they you.

Rick Newell
52:50
The material type publication day, patron type, et cetera, and you might want to use that to maybe decide to subscribe to those journals rather than submitting ILL requests or you could use it, use it to decide to cancel journals. So there, there's an unlimited number.

Rick Newell
53:10
There are things you could do with.

Rick Newell
53:12
Those custom reports. One thing you might want to consider to get some other ideas of, of the reports that you can generate, also from the help menu and and the staff interface, you can go to the community center and.

Rick Newell
53:30
Because I'm a LCLC staffer, but I have to sign in a different way, but once you are signed in, you can have discussions with other libraries, you can see what kinds of reports other libraries have created, and there are also some community reports. So if a.

Rick Newell
53:49
A library has created a really cool report and they choose to share it with the community. You can access their report template and, basically customize it for your library so it has your information in it. So there, there's again an almost unlimited number of reports. I'll, after the session I'll do a little more.

Rick Newell
54:09
For Research on what, what kinds of reports people are creating and I'll I'll send out some examples when I send an email out with a link to the recording.

Rick Newell
54:19
I did want to also mention just a couple of other things inTipasa help. One is that there is a, a section called reference, and so this has some things that you might not necessarily be.

Rick Newell
54:39
Expecting, but e.g., there is a, listing of all the categories and queues. So if you see, a queue or a category in your staff interface you have in a category before and you're wondering, well, what's that about? What should I do with that queue? This categories and queues will, will give you some, some information.

Rick Newell
54:59
About that. And also there is.

Rick Newell
55:02
I very useful help document on notes. It tells you all the different kinds of notes that you may encounter. It tells you, where those come from, the borrowing library or the lending library or the
patron, who can see them and in what, in what situations you can edit them. And one more thing in how.

Rick Newell
55:22
Help.

Rick Newell
55:25
And that is my favorite Tipasa training. And so you you came to this page to register for this class today, but I also want to point out the Toposa training by topic, and I especially want to point out the self-paced course on Toposa bar.

Rick Newell
55:45
Borrowing workflows. So this is, is not a live session, but it's a self-paced session where, it not only presents some information, but, it has some simulations where you can practice the borrowing process. So.

Rick Newell
56:02
And I already mentioned the community center, so I I encourage you to take advantage of that. In addition to the things I mentioned, you can search enhancement requests or contribute your own, and you can find out about news and events such as product insights that.

Rick Newell
56:19
Are presented by my product management colleagues. There's also a knowledge check which you can find in the help, but I'm also going to paste it into chat and we're not going to take time to do it during the session since we're out of time.

Rick Newell
56:34
But I encourage you as you are logging off from Webex to, access this knowledge check. It takes about 3 min and it asks you some, some questions about the material we covered today, and that will help reinforce what you learned today. So if you're attending a live session as you are.
Rick Newell
56:53
And you, you don't see the chat panel. Click that chat button at the bottom right of the screen. If you're being a recording, click the, the word balloon icon at the upper right corner and then you can see that link in chat. So I want to thank all of you for coming today. I hope to see some of you at the.

Rick Newell
57:13
Getting Tipasa training sessions later this month. When you exit from Webex, you'll be directed automatically to an evaluation form. We would appreciate any feedback you might have. When you get to that form, it's going to ask you for the instructor name, so it's my name Rick Newell, and of course the class name is an introduction to Tipasa. So if you have any remaining questions before we.

Rick Newell
57:33
To conclude the session for today, please feel free to send those in chat. I'll be aligning the session for a few more minutes. Otherwise, I'm gonna thank you for coming again and have a great rest of your day. Thanks.

Chat
Learner guide:
https://help.oclc.org/Resource_Sharing/Tipasa/Tipasa_training/Introduction_to_Tipasa

Knowledge check:
https://help.oclc.org/Resource_Sharing/Tipasa/Training/Exercises#Introduction_to_Tipasa_quiz