Tipasa®

Document delivery

Rick Newell
Senior Product Trainer
OCLC
Learning objectives

• Set up document delivery by configuring
  – automations
  – patron request workforms
  – notifications

• Fulfill requests from your patrons
  – for physical or electronic resources that your library holds or licenses
  – for open access resources

• Change fulfillment type between document delivery and ILL request
Definition of Document Delivery

Your patrons → Your collection → No lending library
Your collection includes

• Physical items (holdings set in WorldCat)
• Copies from print journals your library holds
• Links to resources your library has registered in the WorldCat knowledge base
• Open Access links
• Links to other electronic resources your library has available
Reasons to consider Document Delivery

• You allow patrons to request copies from journals held in your print collection.

• You fill book/returnable requests for held items and ship them to your distance education students or other remote patrons, or deliver them to faculty offices.
Automations > Route to Document Delivery

• Without Document Delivery turned on, 3 options for exceptions:

• With Document Delivery turned on, 4 options for exceptions:
Automatic routing to Document Delivery

- To automatically route to the Document Delivery queue, patron request must contain ISBN, ISSN, or OCLC number.
- If the request doesn’t have any of these, it will route to New for Review.
Quiz

- If you are participating in a live online class
  - See clickable link in Webex chat panel
  - When you have finished the quiz, please click the smile reaction from the bottom of the screen
  - 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 quiz
  - See clickable link in Webex chat panel
  - To open the chat panel, click the button in the upper right corner
Reports

WorldShare

Metadata | Acquisitions | Circulation | Interlibrary Loan | Analytics | Admin

Collection Evaluation
My Files
Reports

Reports

- Metadata Reports
- Circulation Reports
- Cataloging/Collection Reports
- Interlibrary Loan Reports
  - Document Delivery Activity Overview
  - Document Delivery Request Detail
  - Document Delivery Request Statistics
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**: Document Delivery

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

newellr@oclc.org or 1.800.848.5878