Overview

- Patrons log in to the User Portal to complete request workforms and submit requests; check on the status of requests; and access Article Exchange, knowledge base, and open access links.
- Your library can customize the patron request workforms.
- You can configure your library’s discovery interfaces (including WorldCat Discovery) to send OpenURL links to the forms in the user portal. This will populate the workforms with bibliographic data.
- Requests submitted by patrons appear in your New for Review queue. (If the request matches a Direct Request profile, the request can go directly to a lending library).
- Your library can customize patron notifications.

Setup

In OCLC Service Configuration:

- To customize the logo, colors, etc. in the User Portal, go to **WorldCat Discovery and WorldCat Local > User Interface Options**. If your library has already customized these settings for other OCLC services such as WMS or WorldCat Discovery, these settings will also apply to the User Portal.
- If your library uses WorldCat Discovery, go to **WorldCat Discovery and WorldCat Local > Place Hold/Request Buttons** to configure buttons to send OpenURL links to patron request workforms to populate bibliographic data. Your OCLC implementation managers will help you set this up. [Documentation](#) and a [video](#) are also available.
- Go to **WorldShare ILL**
  - Go to **Patron Settings**
    - **Patron Account Management**
      - If you want to require approval for new ILL patron accounts, select the **On** box. Most libraries will choose not to require approval, especially if they are migrating a file of (already-approved) patrons.
- **Patron Request Management**
  - By default, Display Patron Due Date is set to On. The due date displayed in the user portal will be the lender's due date, minus any offset configured in Number of days to offset patron's due date. If you want to prevent inconsistencies with your circulation system due date, you can:
    - Deselect this option. The due date does not display in the User Portal and the status will be Received by library.
    - In Print Settings, deselect Show Due Date on borrower book straps/stickers.
  - Select the number of days (0-5) you want to offset the patron’s due date. This setting allows you to specify whether the patron’s due date should occur before the lender’s due date. The offset date will appear to patrons in the User Portal and notifications, as well as any borrower book straps/stickers you print.
  - If you want to allow patrons to renew ILL requests from the User Portal, select the **On** box.
  - If you want to allow patrons to cancel ILL requests from the User Portal, select the **On** box.
  - Optional: If you want to limit the number of active requests allowed per patron, enter a number 1-500. For no limit, leave blank.

- **Patron Data Retention**
  - Select number of months (1-60) to retain patron data after a request is closed. Default is 1 month.
  - This setting affects:
    - How long patrons have access to closed requests in the User Portal
    - How long ILL staff can retrieve closed requests by searching on Patron Name or Patron ID in the staff interface
  - Go to **Patron Request Workforms**. For each of the three forms (Article, Book, Other), follow the instructions in Tipasa Help to customize the forms.
    - Tipasa libraries should not use the WorldCat Discovery Request form, because it only offers IP authentication. If you set up the WorldCat Discovery Request Form, patrons will be unable to track and view their requests in the user portal. Instead, OCLC recommends configuring the resource sharing button in your WorldCat Discovery catalog with OpenURL to link to the forms in the user portal. This will populate the forms with bibliographic data. Your OCLC implementation managers can help you set this up.
  - Go to **Notifications**. Follow the instructions in Tipasa Help to customize the notifications.
    - By default, no notifications are turned on. Tipasa provides 28 event-specific notifications. You may also configure up to 50 custom notifications.
Most of the 28 event-specific notifications may be automated (triggered by an event, such as receiving an item), manual or both. Most may be sent as email, SMS text message, or both.

- Custom notifications (email only) are sent only manually (by using the email function within the Tipasa staff interface).
- Select whether your library will send SMS text notifications.
- Edit each notification as needed. In each notification, be sure to include the appropriate contact information for your library.
- For every notification you want to turn on, select Manual and/or Automated (where applicable).

**Process requests**

Requests submitted by patrons appear in your New for Review queue. Process these according to your usual workflows.

Tipasa processes requests that match a Direct Request Profile according to that profile, which may include routing to your Document Delivery queue or automatically producing (sending) requests to lenders.

**Manage patrons**

- While viewing a request, you can:
  - View a brief summary of patron information by hovering your mouse over **Patron Summary**

![Patron Summary](image)

- **Ferelli, Fern** (ferellif)
  - **Department**: Environmental Studies
  - **Address**: 220 W. Mercer St., Seattle, 98119, WA, US
  - **Phone**: +1 800-849-5878
  - **Email**: ferellif@notreal.edu
  - **Notes**: Distance student - please mail to me.
• Scroll to the Patron section at the bottom of the request to view full patron details

• From the Tipasa staff interface, there are two ways to open and edit a patron record:
  o While viewing a patron-submitted request, click **View Patron**
  o From the left navigation, click **Find Patrons**. Search by any of the available indexes.

• With a patron record open, you can:
  o View patron information. In the Basic User Data section, scroll to the Interlibrary Loan and ILL Delivery Notification sections.
  o Edit patron information (click the **Edit** button at the top right of the Basic User Data section).
    ▪ Click **Approved** to approve a patron.
    ▪ Click **Blocked** to block a patron. If your library uses WorldShare Circulation, note that the conditions (such as number of overdue items or amount of fines/fees) your library may have configured to automatically block Circulation transactions will not block a patron from submitting an ILL request. Blocking an ILL patron is a manual transaction performed by staff.
    ▪ Note that although staff may view patron communication preferences (Send Updates, Send Email Updates, Send SMS Updates), only the patron may edit these preferences.
    ▪ Click **Save** to save edits, or click **Cancel** to abandon changes.