

Class Handout



Introduction to Tipasa®

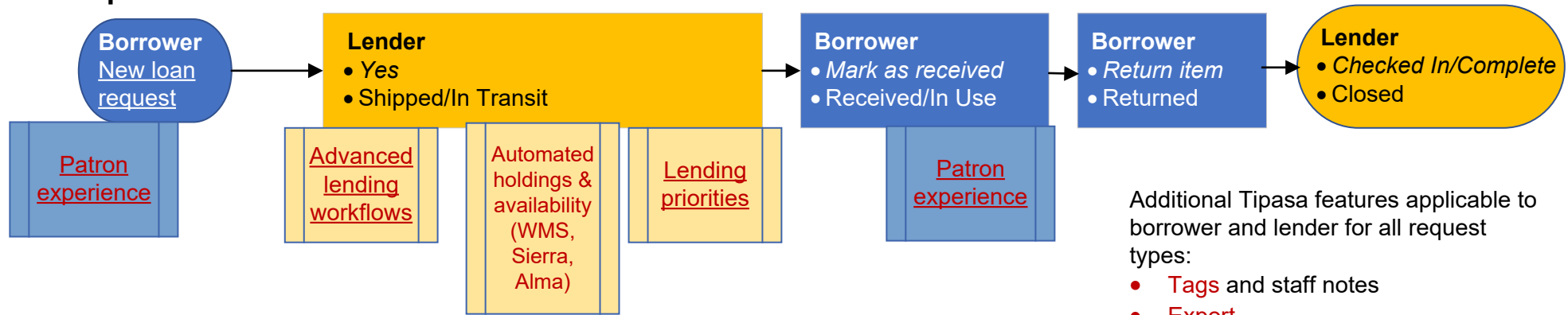
Training, documentation, and Community Center

Links are available within the Tipasa staff interface or

- Training and documentation:
https://help.oclc.org/Resource_Sharing/Tipasa
- Community Center: <https://www.oclc.org/community>



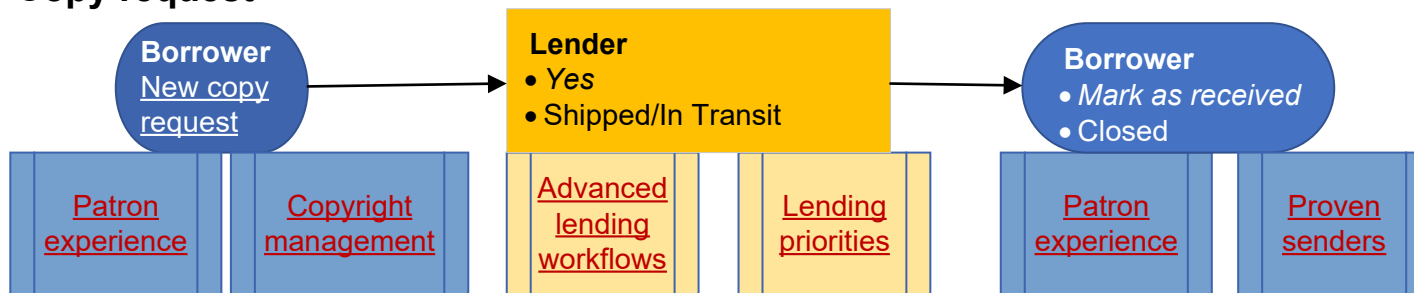
Loan request



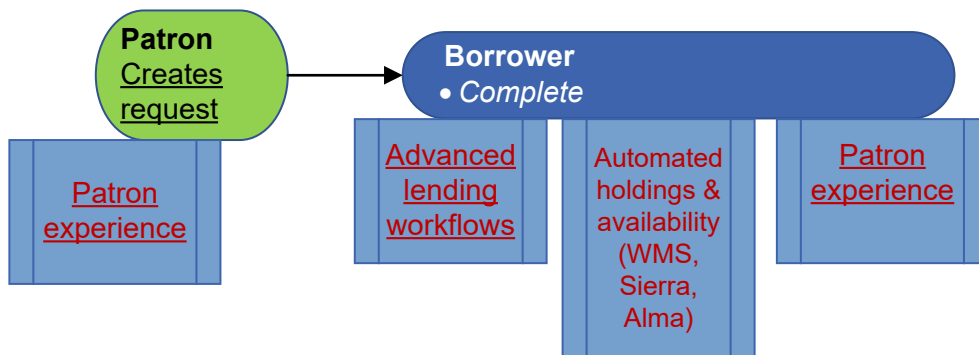
Additional Tipasa features applicable to borrower and lender for all request types:

- **Tags** and staff notes
- **Export**
- Reports available through OCLC Usage Statistics, **WorldShare Reports**, and **WorldShare Report Designer**

Copy request



Document delivery

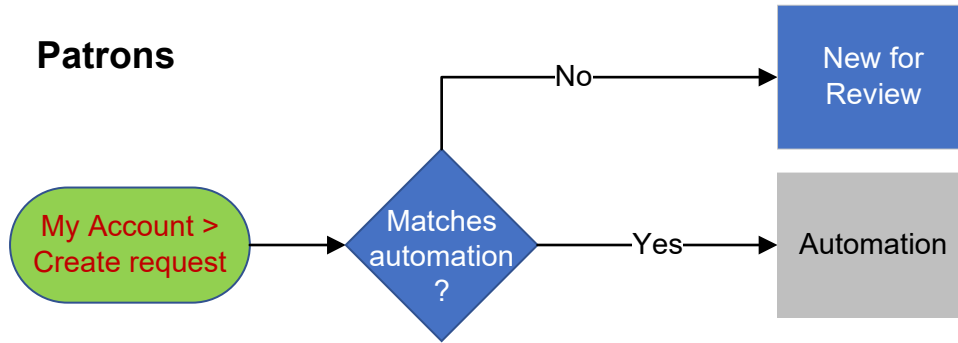


Legend

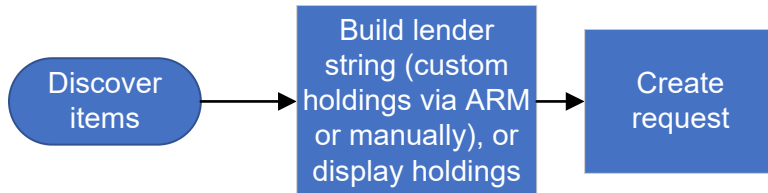
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Automatic system action

Sources for new requests

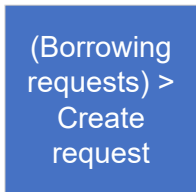
Patrons



Staff



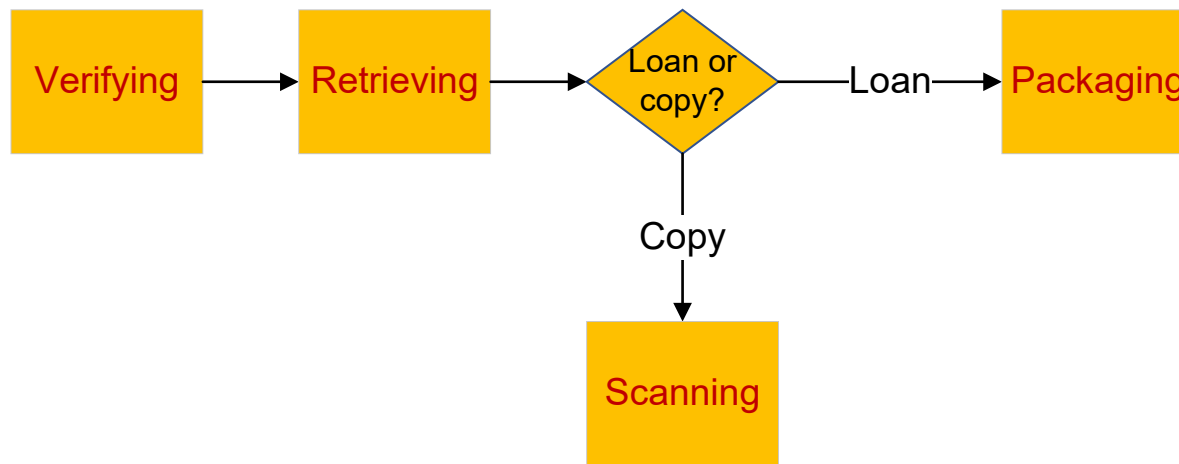
Staff



Legend

Tipasa features

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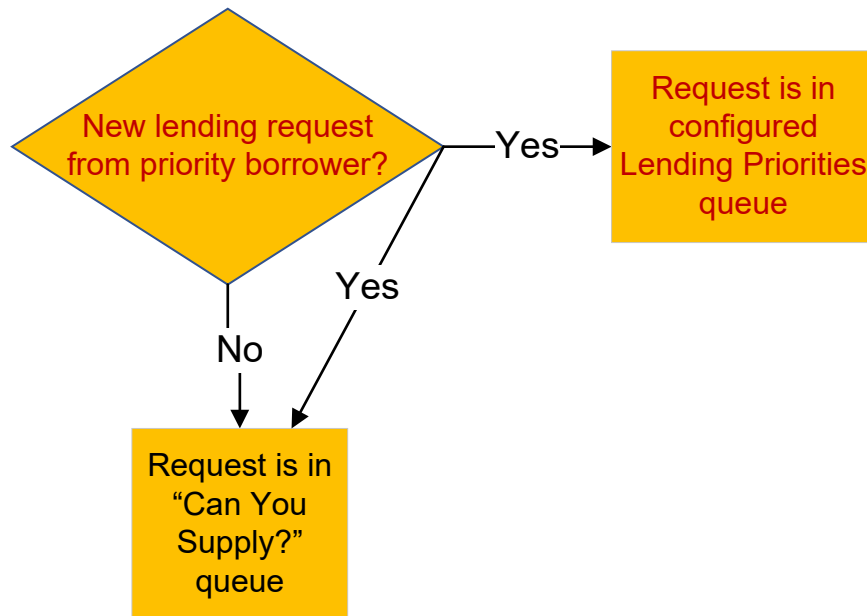
Legend

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Enable special queues for requests from priority borrowers

- Configure display name
- Filter by custom holdings group or profiled group



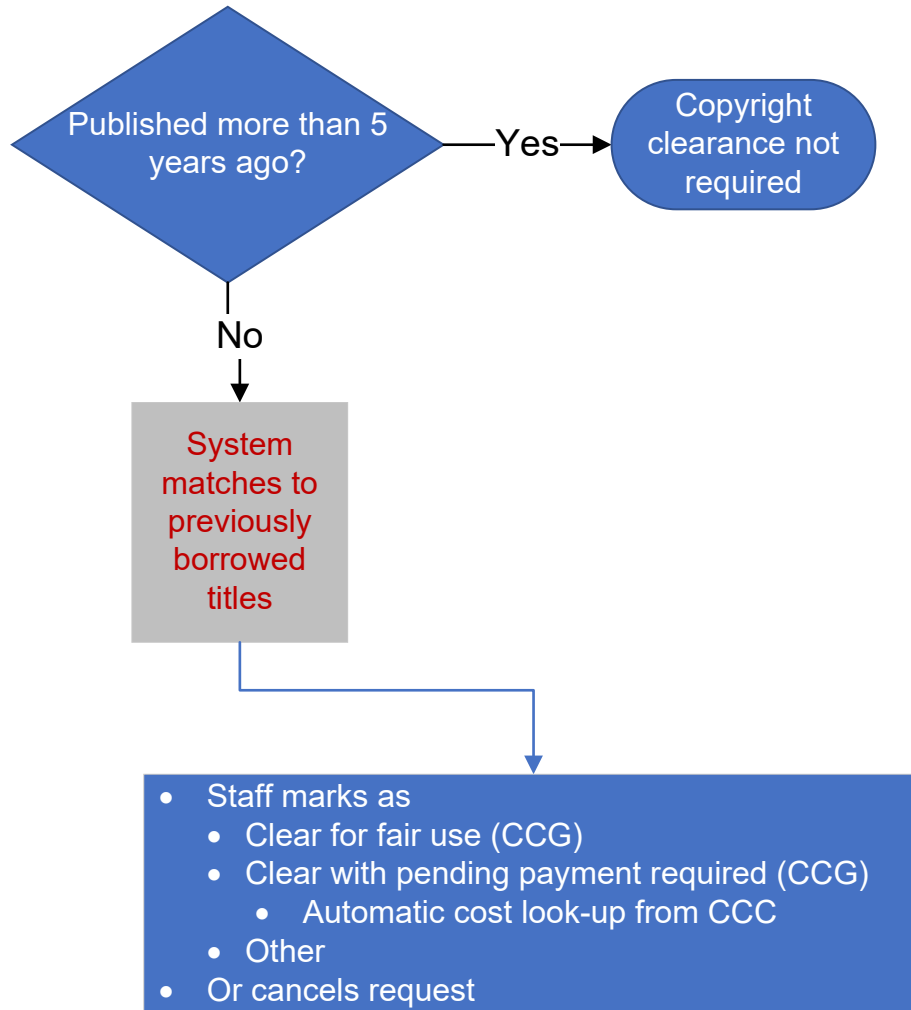
Legend

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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)



Additional copyright management functions:

- View and export copyright information by title
- Edit copyright usage information
- Export data about payable copyright fees

Legend

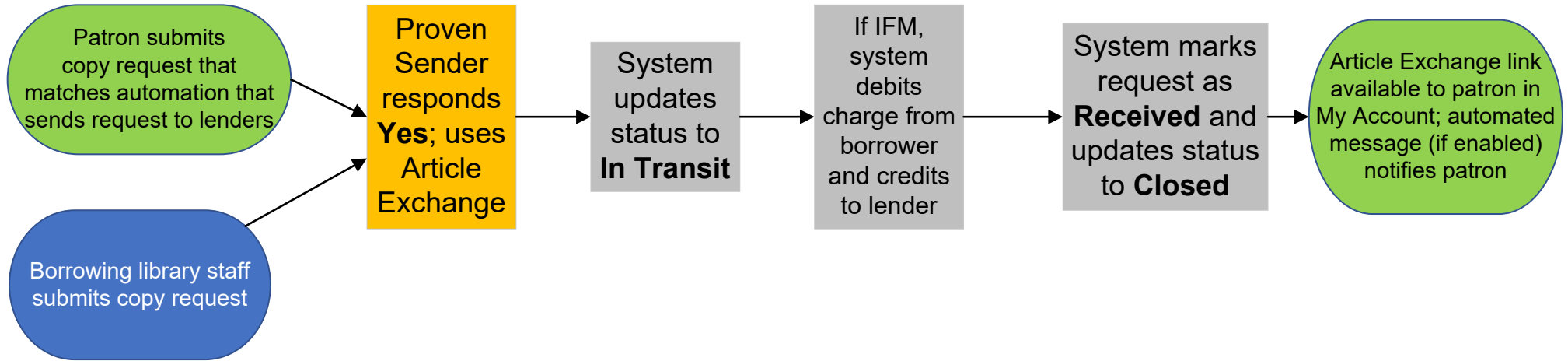
Tipasa features

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Proven senders

Based on a Custom Holdings Group

No staff intervention needed



Legend

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Options:

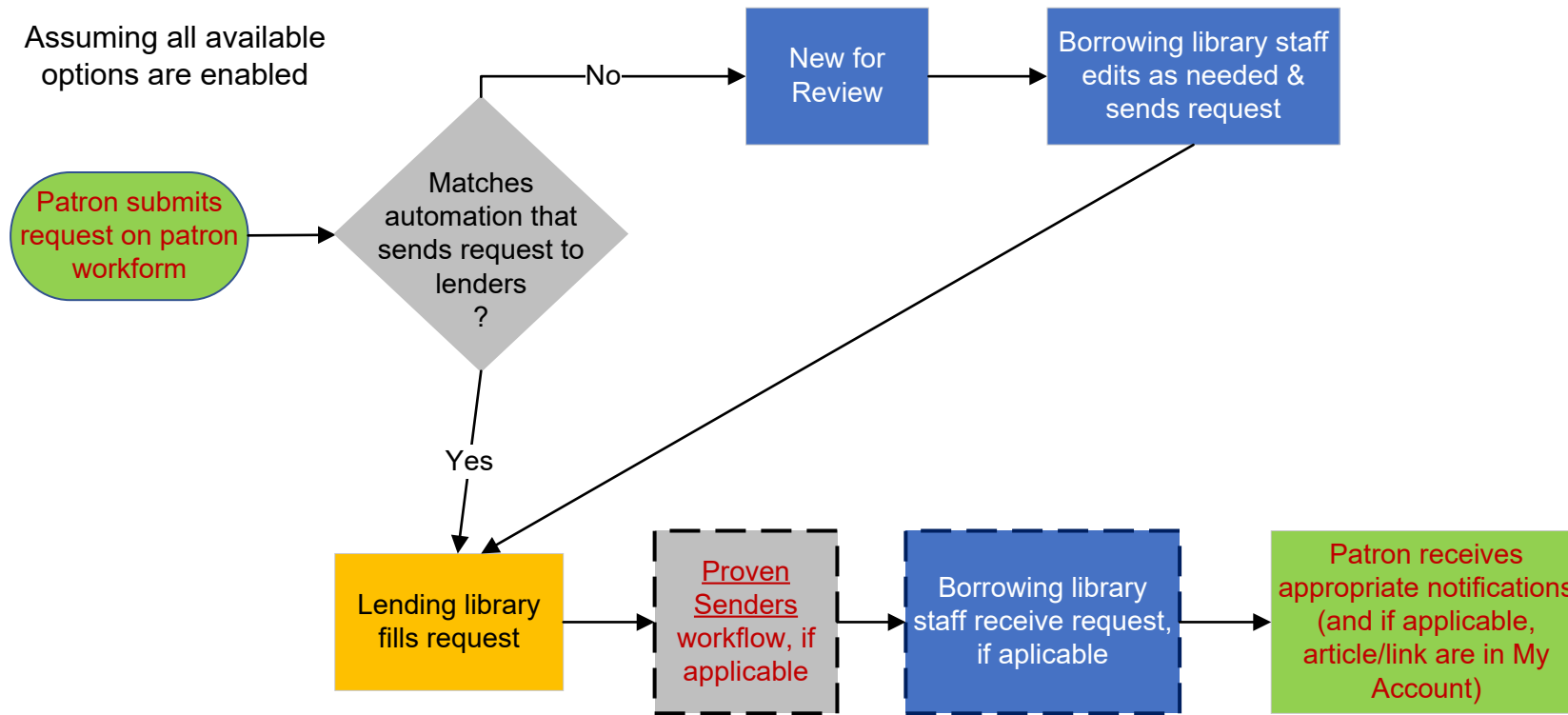
- Require approval for new ILL patron accounts
- Allow patrons to renew requests online
- Allow patrons to cancel requests online
- Hide patron due date (to prevent inconsistency with circulation system), or display patron due date and optionally select number of days to offset patron's due date
- Customize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

**Legend****Tipasa features**

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Patron workflow

Assuming all available options are enabled



Legend

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