Introduction to Tipasa®

Learning objectives

This course provides a high-level overview of Tipasa. After completing this course, you will 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, and notifications.

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

Smart fulfillment

OCLC recommends using smart fulfillment, including real-time availability for ILL, Automated Request Manager (ARM), and smart lender strings to make your borrowing and lending activities more efficient.
Tipasa® features related to interlibrary loan workflows

Loan request

Borrower
New loan request

Patron experience

Lender
- Yes
- Shipped/In Transit

Automated holdings & availability (WMS, Sierra, Alma)

Lending priorities

Borrower
- Mark as received
- Received/In Use

Patron experience

Borrower
- Returned
- Returned

Lender
- Checked In/Complete
- Closed

Copy request

Borrower
New copy request

Patron experience

Copyright management

Lender
- Yes
- Shipped/In Transit

Advanced lending workflows

Lending priorities

Borrower
- Mark as received
- Closed

Proven senders

Document delivery

Patron
Creates request

Patron experience

Borrower
- Complete

Advanced lending workflows

Automated holdings & availability (WMS, Sierra, Alma)

Patron experience

Additional Tipasa features applicable to borrower and lender for all request types:
- Tags and staff notes
- Automations
- Export
- Reports available through OCLC Usage Statistics, WorldShare Reports, and WorldShare Report Designer

Legend

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

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Sources for new requests

**Patrons**

1. My Account > Create request
2. My Account > Create request
3. My Account > Create request

**Staff**

1. Discover items
2. Build lender string (custom holdings via ARM or manually), or display holdings
3. Create request

**Legend**

- **Tipasa features**
  - Borrowing library staff action
  - Lending library staff action
  - Patron experience
  - Automatic system action

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Advanced lending workflows

Legend

**Tipasa features**
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Automatic system action
Enable special queues for requests from priority borrowers

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

**Legend**

- **Tipasa features**
  - Borrowing library staff action
  - Lending library staff action
  - Patron experience
  - Automatic system action
Copyright management

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)

Published more than 5 years ago?

Yes → Copyright clearance not required

No → System matches to previously borrowed titles

- Staff marks as
  - Clear for fair use (CCG)
  - Clear with pending payment required (CCG)
    - Automatic cost look-up from CCC
  - Other
  - Or cancels request

Additional copyright management functions:
- View and export copyright information by title
- Edit copyright usage information
- Export data about payable copyright fees

Legend

Tipasa features
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Automatic system action
Based on a Custom Holdings Group

Proven senders

Patron submits copy request that matches automation that sends request to lenders

Proven Sender responds Yes; uses Article Exchange

System updates status to In Transit

If IFM, system debits charge from borrower and credits to lender

System marks request as Received and updates status to Closed

Article Exchange link available to patron in My Account; automated message (if enabled) notifies patron

Legend

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

No staff intervention needed

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Configuration options for patron experience

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

Assuming all available options are enabled

Patron submits request on patron workform

Matches automation that sends request to lenders?

Yes → Lending library fills request

No → New for Review → Borrowing library staff edits as needed & sends request

Borrowing library staff receive request, if applicable

Patron receives appropriate notifications (and if applicable, article/link are in My Account)

Legend

Tipasa features:
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Patron workflow, if applicable
- Proven Senders workflow, if applicable
- Automatic system action
Borrowing automations

- Choose from these actions:
  - Add tags
  - Apply constant data
  - Build lender string
  - Route request to:
    - Review
    - Document delivery, if held
    - Purchase
    - WMS Acquisitions
    - Lenders
- Based on match criteria:
  - Age of material
  - Material format
  - Languages
  - Need before date
  - Patron department
  - Patron note
  - Patron status
  - Patron will pay up to
  - Request type

Lending automations

- Choose from these actions:
  - Add tags
  - Apply constant data
- Based on match criteria:
  - Branch holding location
  - Shelving location
  - Custom holding group or profiled group membership of requesting library
  - Request type
  - Material format

Legend

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