

Tipasa®

Document delivery

Learning objectives

This course provides the basic skills needed to configure Tipasa document delivery functionality, and efficiently manage document delivery requests. After completing this course, you will be able to configure automations, patron request workflows, and notifications to facilitate document delivery; fulfill requests from your patrons for physical or electronic resources that your library holds or licenses, as well as open access resources; and change fulfillment type between document delivery and ILL request.

Purpose of Document Delivery

The Document Delivery features in Tipasa allow your library to fulfill requests from your patrons with items from your own collection. Your collection includes:

- Physical items your library holds
- 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

When Document Delivery is enabled, the Document Delivery queue appears in the left navigation as well as Quick Links. You can configure automations to route requests for items your library holds to the Document Delivery queues.

Reasons to use Document Delivery

You may want to use Document Delivery if:

- You allow patrons to request copies from journals held in your print collection.
- You ship physical items held by your library to patrons who do not live near a library location, such as distance education students.
- You deliver physical items held by your library to faculty, graduate students, or other patrons.
- You want to easily provide your patrons with links to electronic resources your library has licensed (or open access resources).

Set up Document Delivery

Use Service Configuration to set up Document Delivery. In order to automatically route patron requests from My Account to the Document Delivery queue, you must have an appropriate automation.

1. Navigate to OCLC Service Configuration > WorldShare ILL.
2. Navigate to Advanced Workflows.
 - a. (Optional) Under Advanced Lending, select the **On** box.
 - b. Under Document Delivery, select the **On** box. Click **Save**.

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3. Navigate to Automated Request Manager. Edit an existing automation or create a new one.
 - a. If creating a new automation, enter a Name.
 - b. Enter a Priority. Of all the automations that match the request, the automation with the highest priority, or lowest assigned Automation Priority number, will be applied to the request.
 - c. (Optional) Add a Match.
 - d. (Optional) Add an Action.
 - e. Under Exceptions, select **If Held by My Institution, Route to Document Delivery**.
 - f. Click **Save**.

For more information see [Using automations with Tipasa](#).

4. (Optional) Navigate to Patron Request Workforms. Customize the workforms as needed, following the instructions in [Tipasa help](#). Document Delivery and ILL use the same workforms; Tipasa routes requests to the Document Delivery queue based on information in the request, your library's holdings, and your automations. If your library delivers physical items to patrons, consider adding address fields to appropriate request workforms.
5. (Optional) Navigate to Notifications. Under Document Delivery Library to Patron, configure notifications as needed, following the instructions in [Tipasa help](#). You may also configure up to 50 Custom notifications.

Process Document Delivery requests

1. Open a request from the Document Delivery queue in the left navigation, or from Quick Links.
2. Process the request as usual.
 - a. **Optional:** Use Advanced Lending workflows. See [Advanced Lending and Document Delivery](#) for more information.
 - b. **Optional:** To populate the Local ID field so that it will be included if you print the request (for example, to use as a pull slip):
 - If your library is configured for automatic holdings and availability lookup:
 - If you have one holding, the Local ID field should be pre-populated with location and call number. Verify Availability (under Local Holdings).
 - If you have more than one holding, click **View Local Holdings**. Select which holding to use and click the **Apply** button. This will populate the Local ID field with location and call number.
 - If your library is *not* configured for automatic holdings and availability lookup:
 - Click **Search my library's online catalog**
 - In your catalog, verify availability (and copy the call number)
 - On the request, paste the call number into the Local ID field
 - Click **Save**

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3. For copy requests:
 - a. In the Request Details accordion, make sure **Copy** is selected as the Type.
 - b. In the URL type field, select **Article Exchange**.
 - b. In the URL field, click **OCLC Article Exchange**.
 - c. Locate the copy on your computer. Click **Open**.
 - d. Click **Drop File**.
 - e. Optional: Click **Preview** to preview the file.
4. For requests you will fulfill with a knowledge base link:
 - a. In the Request Details accordion, make sure **Copy** is selected as the Type.
 - b. In the URL type field, select **KB Link**.
 - c. In the URL field, enter the appropriate URL.
5. For requests you will fulfill with an Open Access link:
 - a. In the Request Details accordion, make sure **Copy** is selected as the Type.
 - b. In the URL type field, select **Open Access**.
 - c. In the URL field, enter the appropriate URL.
6. For loan requests:
 - a. Locate the requested item in your collection.
7. Click **Mark as Complete**.
8. The request is closed and moves to Closed (Supplied).
 - a. Article Exchange files, Open Access links, and knowledge base links will be available to the patron in My Account.
 - b. If your library has configured automated Document Delivery Library to Patron notifications, the appropriate notifications will be sent.

Change Fulfillment Type

- Even if your library holds an item, a request may appear in the New for Review queue rather than the Document Delivery queue. This could happen if the patron request does not include an ISBN, ISSN, or OCLC number. To change it to a Document Delivery request, at the top of the request, click **Change Fulfilment Type > Document Delivery**. Then proceed as above to process the request.
- In some cases, you may not be able to fulfill a Document Delivery request from your collection. This could happen, for example, if your library holds a journal, but does not have the specific volume needed. To change the request to an ILL request, at the top of the request click **Change Fulfilment Type > ILL Request**. Then process the request as usual.

Difference between URL Type Open Access Link and Fulfillment Type Open Access

- **URL Type Open Access Link (recommended).** To use this method, the Fulfillment Type must be Document Delivery, and the URL Type must be Open Access Link. Enter the appropriate URL in the URL field, then click **Mark As Complete**. The link will be available to the patron in My Account, and if your library has configured automated Document Delivery Library to Patron notifications, and the patron has selected to receive email or text message notifications, the appropriate notifications will be sent. The request status is updated to Closed (Supplied).

The screenshot shows a request management interface. At the top, there are buttons for 'Mark as Complete', 'Change Fulfillment Type', and 'Cancel Request'. To the right, an 'Actions' section contains 'Mark as Verifying', 'Save', 'Reset', 'Email', and 'Print Now'. Below this, the 'Request Details' for Request ID 169840792 are shown. The 'Source' is 'PATRON' and the 'Status' is 'Delivering'. The 'Fulfillment Type' is 'Document Delivery'. The 'URL Type' is set to 'Open Access Link' in a dropdown menu, and the 'URL' field is empty. A link to 'Search my library's online catalog' is visible. On the right side, there is a section titled 'Open Access' with the text 'No links found'.

- **Fulfillment Type Open Access (not recommended).** To use this method, first click the **Email** button and send the appropriate link to the patron. Then click **Change Fulfillment Type > Open Access**. The request status is updated to Closed/Open Access. The link will not be available to the patron in My Account.

This screenshot shows the same interface as the previous one, but with the 'Change Fulfillment Type' dropdown menu open. The menu options are 'Open Access', 'Purchase Request', and 'ILL Request'. The 'Email' button in the 'Actions' section is highlighted with an orange box.

Document Delivery reports

Three reports are available to help you understand and manage your library's Document Delivery activity. To access the reports, go to **Analytics > Reports > Reports > Interlibrary Loan Reports**. The three reports are:

- Document Delivery Activity Overview: for each month, provides a count of Document Delivery requests filled (and average turnaround time), cancelled, and expired.
- Document Delivery Request Detail: for each Document Delivery request, provides bibliographic information, borrower request tags, date and time request created and closed/cancelled/expired, and turnaround time for filled requests. Optionally filter by material format, patron department, patron status, and source (staff or patron created).
- Document Delivery Request Statistics: provides request filled count, average filled turnaround time, cancelled request count, and expired request count; by patron status, patron department, or material format.

For more information see the Tipasa [online help](#) for WorldShare reports.

Exercise

[Document delivery quiz](#)