

Introduction to Tipasa®

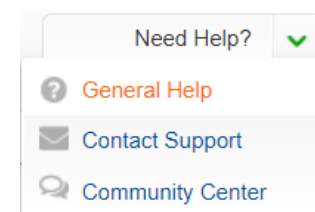
Learning objectives

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 workflows, 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>



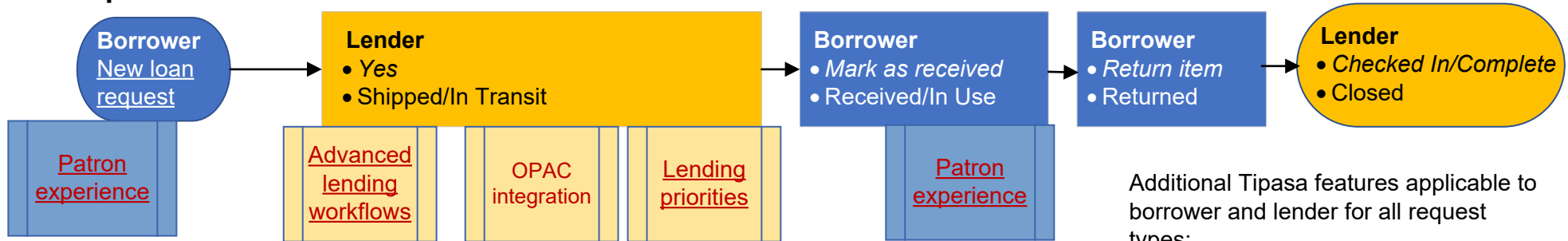
Smart fulfillment

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.

Prepare and plan

OCLC recommends reviewing your records in the OCLC Policies Directory, your constant data, and your Custom Holdings groups and paths. For more information, see [Prepare and plan](#).

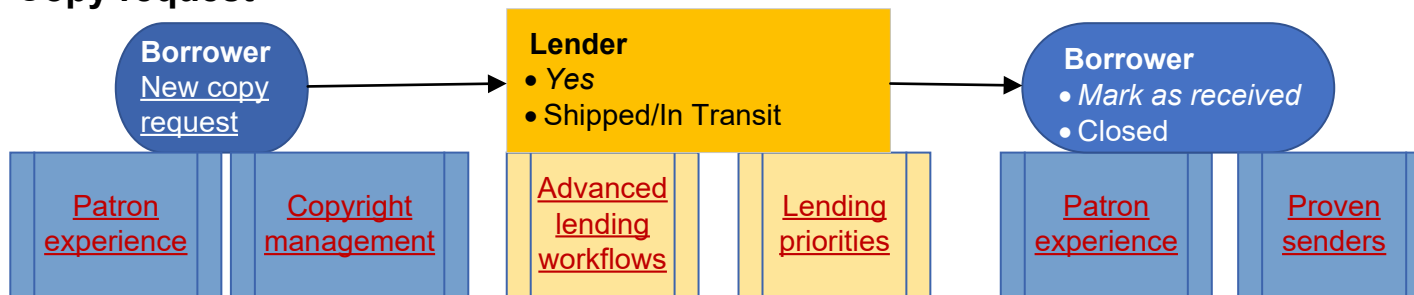
Loan request



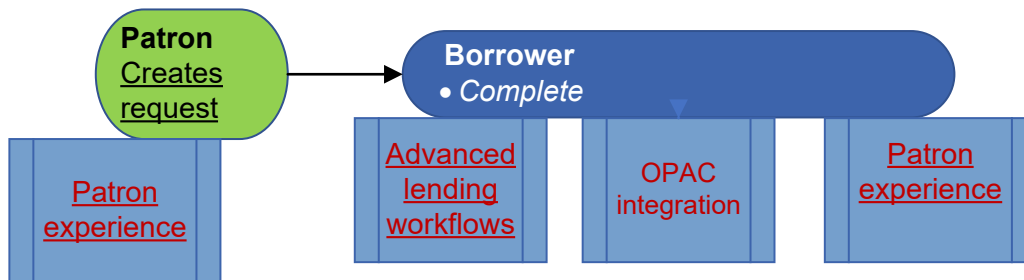
Additional Tipasa features applicable to borrower and lender for all request types:

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

Copy request



Document delivery

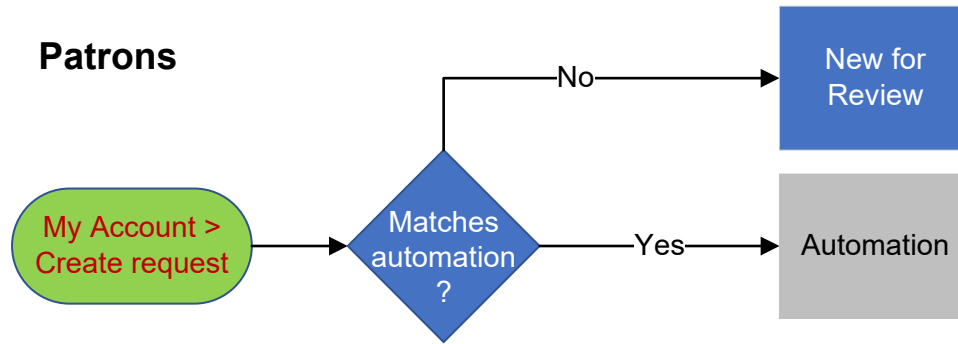


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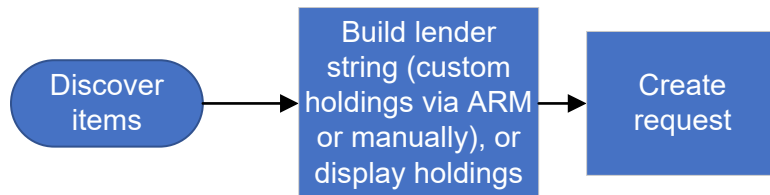
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Automatic system action

Sources for new requests

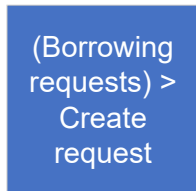
Patrons



Staff



Staff



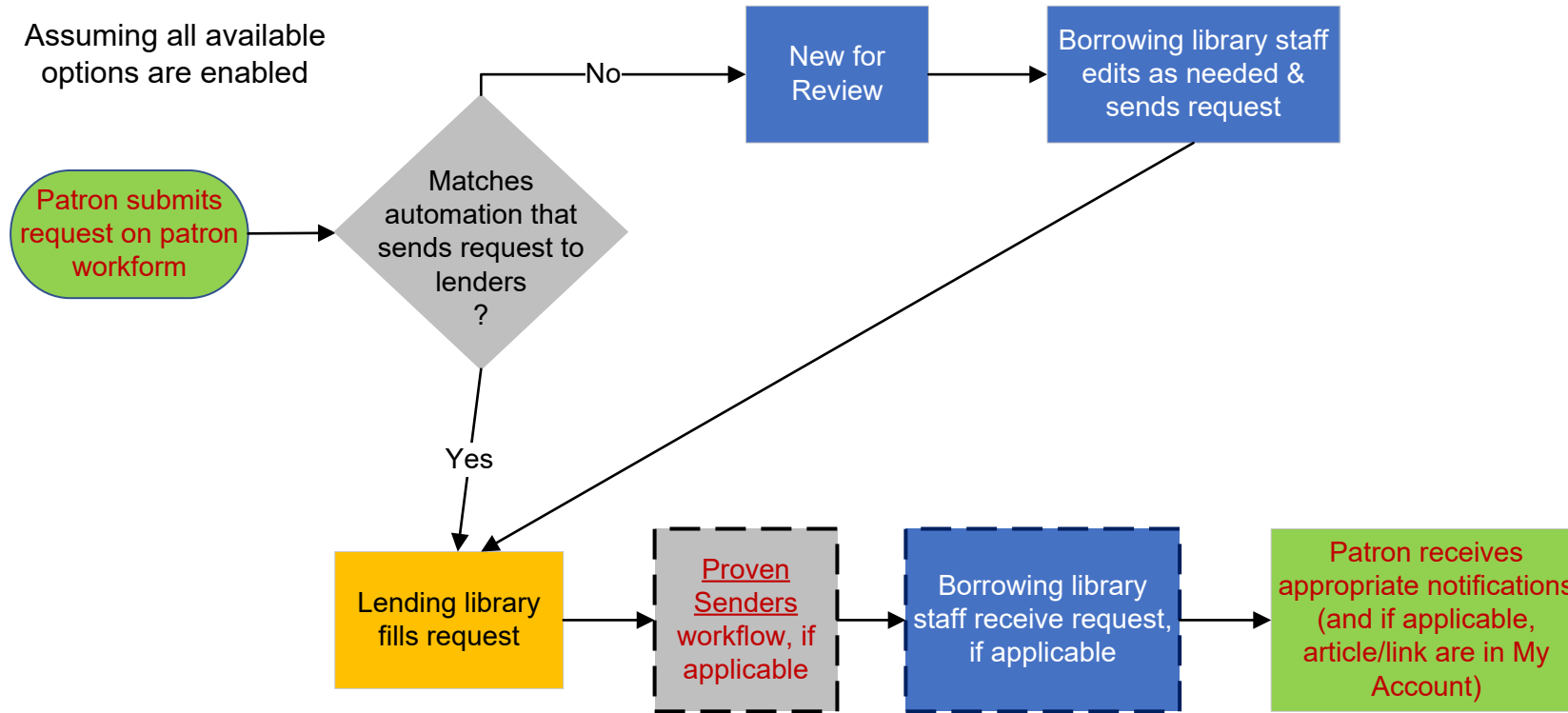
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Tipasa features

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Request workflow

Assuming all available options are enabled



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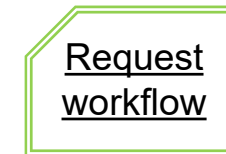
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Configuration options for patron experience

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

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Automations

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

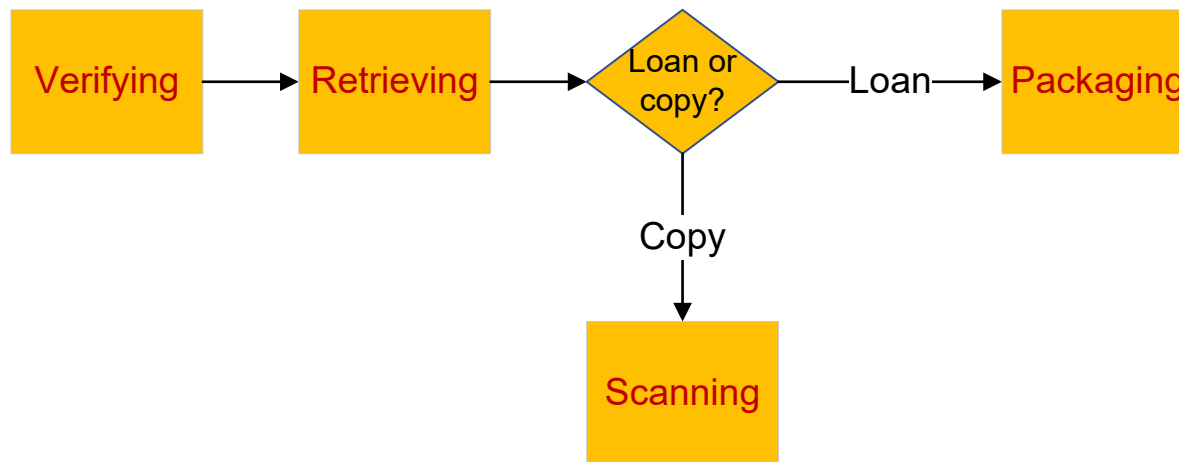
- Choose from these actions:
 - Add tags
 - Apply constant data
- Based on match criteria:
 - Branch holding location
 - Shelving location
 - Custom holding group or profiled group membership of requesting library
 - Request type
 - Material format

Legend

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Advanced lending workflows

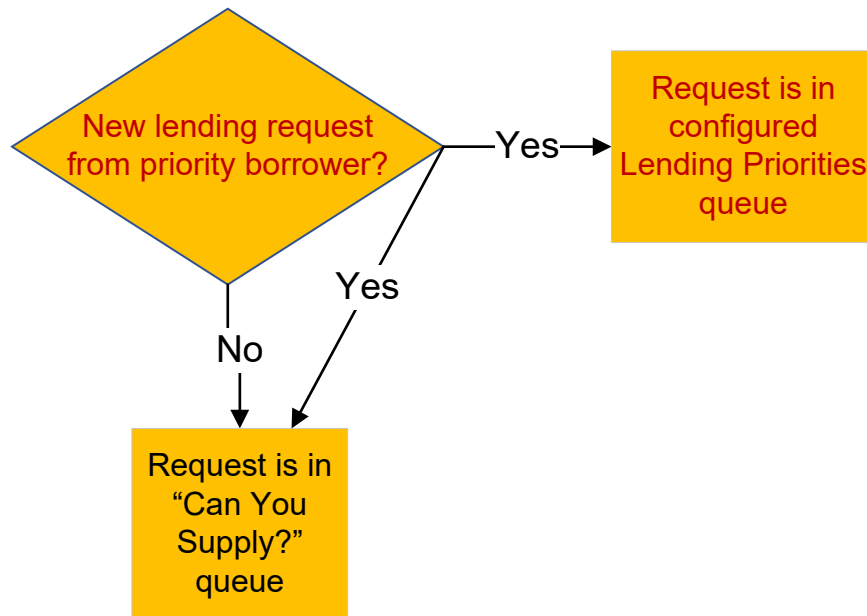
**Legend**Tipasa features

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Lending Priorities

Enable special queues for requests from priority borrowers

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



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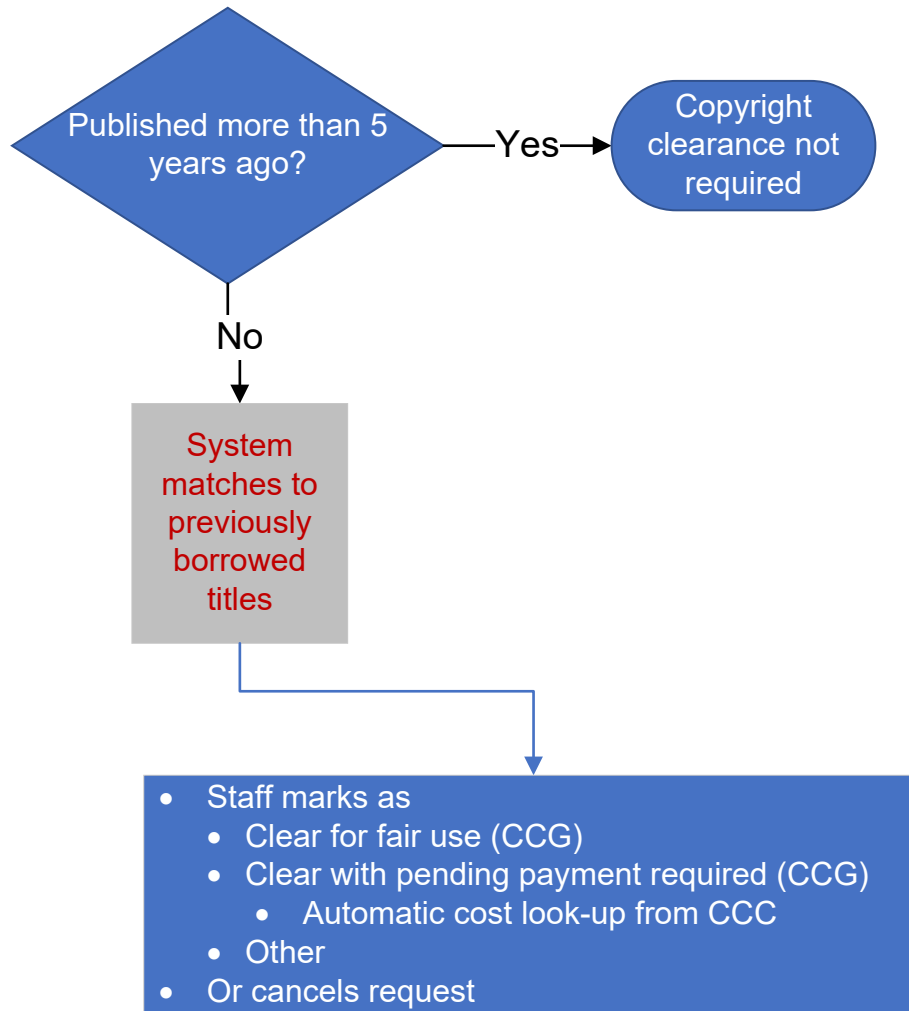
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Copyright management

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)



Additional copyright management functions:

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

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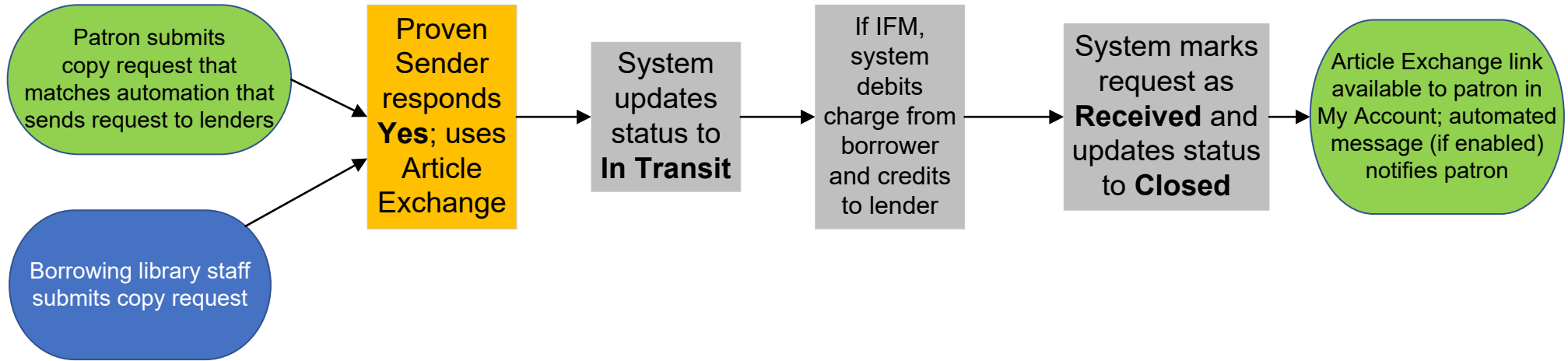
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Proven senders

Based on a Custom Holdings Group

No staff intervention needed



You can choose one of these options for Proven Senders:

- Include ALL lenders
- Include only lenders in a Custom Holdings Group
- Exclude only lenders in a Custom Holdings Group

Legend

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