

Tipasa®

## Lending workflows

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# Learning objectives

- Decide how you will use lending priorities and advanced lending workflows
- Process lending requests for loans and copies
- Print pull slips/packing slips and shipping labels
- Transmit scanned copies via Article Exchange

# What are lending priorities & advanced lending?

The screenshot displays the WorldShare Tipasa Home interface. The top navigation bar includes tabs for Metadata, Acquisitions, Circulation, Interlibrary Loan, Analytics, and Admin. The left sidebar lists navigation options such as Discover Items, Find Patrons, Borrowing Requests, Document Delivery, Lending Requests, Purchasing Requests, Off-System Requests, Print Queue (8), and Manage Copyright. The main content area is titled "Tipasa Home" and features a search for requests section with a "Request ID" dropdown and a "Go" button. Below this is a "Frequently Used Tags" section with a link to "All Tags (1)". The "Quick Links" section is divided into three columns: Borrowing, Lending, and Document Delivery. The Lending column includes links for AE Alert (1), Produced (1), In Transit (1), Received? (1), Received, Returned, Verifying (1), Retrieving (1), Scanning (1), Packaging (1), Supplied, Not Received (1), Overdue (1), and Returned. The Document Delivery column includes links for In Process (1), Retrieving (1), and Other: OCLC Policies Directory, OCLC Service Configuration, OCLC Usage Statistics, OCLC Article Exchange, Resource Sharing News, WS ILL Training Resources, and OCLC Community Center. The bottom of the page has buttons for Turnaround Time and Message Board.

WorldShare®

Metadata Acquisitions Circulation **Interlibrary Loan** Analytics Admin

Tipasa® Home

Discover Items

Find Patrons

Borrowing Requests

Document Delivery

Lending Requests

Purchasing Requests

Off-System Requests

Print Queue (8)

Manage Copyright

**Lending Priorities:**

- Capital City (2)
- Can You Supply? (6)
- New - Loans (2)
- Considering - Copies (1)
- Considering - Loans (3)
- Verifying (1)
- Retrieving (1)
- Scanning (1)
- Packaging (1)

Tipasa Home

Search for requests

Request ID  Go

Active Requests  Closed Requests

Frequently Used Tags

- All Tags (1)

Quick Links

Borrowing:

- AE Alert (1)
- Produced (1)
- In Transit (1)
- Received? (1)

Received

Returned

Lending:

- Lending Priorities**
- Capital City (2)
- Can You Supply? (8)
- New - Loans (4)
- Considering - Copies (1)
- Considering - Loans (3)
- Verifying (1)
- Retrieving (1)
- Scanning (1)
- Packaging (1)

Supplied

- Not Received (1)
- Overdue (1)

Returned

Document Delivery:

- In Process (1)**
- Retrieving (1)

Other:

- OCLC Policies Directory
- OCLC Service Configuration
- OCLC Usage Statistics
- OCLC Article Exchange
- Resource Sharing News
- WS ILL Training Resources
- OCLC Community Center

Turnaround Time Message Board

# Suggested uses for Lending Priorities

Consider Lending Priorities if:

- Your library is a member of a consortium
- You need to give priority to in-state requests
- Your library has reciprocal agreements with other libraries
- You want to give special handling to requests from libraries that are on your courier service

# Suggested uses for Advanced Lending Workflows

If your ILL lending or document delivery operation has:	Consider these Advanced Lending Workflows
Several full-time staff; several student or part-time workers	VRSP
One full-time staff; several student or part-time workers	RSP
One full-time staff; one student or part-time worker	R
One staff member who does all ILL lending activities or document delivery; no student or part-time worker	none

**V**erifying, **R**etrieving, **S**canning, **P**ackaging

# Things to know


- You can configure up to 5 priority lending queues
- Verifying, Retrieving, Scanning, and Packaging queues:
  - Requests move between these queues only as the result of staff action
  - Moving a request into one of these queues does not stop request aging or change Days to Respond
  - These queues are also available in Lending Priorities and Document Delivery, if enabled

# Workflow for a loan request

Lender: Lending Priorities

The screenshot shows the WorldShare Tipasa Home interface. The top navigation bar includes 'Metadata', 'Interlibrary Loan', and 'Admin'. The left sidebar contains a menu with the following items: Tipasa® Home, Discover Items, Find Patrons, Borrowing Requests, Document Delivery, Lending Requests, Purchasing Requests, Off-System Requests, Print Queue (8), and Manage Copyright. The 'Lending Priorities:' section is highlighted with an orange border and contains a dropdown menu for 'Capital City (0)' and three buttons: 'Can You Supply? (6)', 'Considering - Copies (2)', and 'Considering - Loans (4)'. Below this are buttons for 'Supplied (11)' and 'Shipped/In Transit (8)'. The main content area is titled 'Tipasa Home' and features a search bar for requests, a 'Frequently Used Tags' section with a 'TPU' tag, and a 'Quick Links' section with three columns of links: Borrowing (Produced (2), Received, Returned), Lending (Lending Priorities, Can You Supply? (14), Considering - Copies (4), Considering - Loans (10), Supplied Overdue (3), Returned Returned/In Transit (3)), and Document Delivery (New (3), New - Loans (3), Other: OCLC Policies Dir, OCLC Service Cont, OCLC Usage Stat, OCLC A...).


# Workflow for a loan request





WorldShare® Need Help?   
User support info


Metadata Acquisitions Circulation **Interlibrary Loan** Analytics Admin

Tipasa® Home TS259 R

Lending Requests: [New - Loans \(4\)](#)

Results 1 - 4 of 4 

ID	Media Type	Title	Borrower	Time To Respond	Tags
<a href="#">215122996</a>		<a href="#">Women in American Indian society.</a>	TPV	< 12 hours	
<a href="#">215123001</a>		<a href="#">Here on earth : a natural history of the planet</a>	TPV	< 12 hours	
<a href="#">215191219</a>		<a href="#">Social media tools and platforms in learning environments</a>	TPU	> 5 days	
<a href="#">215191336</a>		<a href="#">Human competence : engineering worthy performance</a>	TPU	> 5 days	

Results 1 - 4 of 4 

Lending Priorities:

- Capital City (5)
- Can You Supply? (6)
- New - Copies (1)
- New - Loans (4)**



# Workflow for a loan request (with OPAC integration)

## Lender:

1. Automatic catalog lookup shows availability (for a single holding)
2. And populates Local ID with location & call number
3. Add to Book Strap/Sticker Print Queue
4. Mark as Retrieving

The screenshot displays a library system interface with a yellow callout box on the left detailing a four-step workflow. The interface includes a top navigation bar with 'Tipasa® Home', 'Discover Items', and 'Find Options'. The main header shows the request ID '215123012: Human competence : engineering worthy performance' and navigation links for 'Previous Request' and 'Next Request'. A 'Lenders' section on the left lists 'Capital City (4)', 'Can You Supply? (4)', 'New - Copies (1)', and 'New - Loans (3)'. The central area features a 'Request Tags' dropdown and a 'Group Affiliations' section. The right side contains a 'TEST' panel with 'Apply constant data' and 'Actions' (Note, Mark as Considering, Save, Email, Print Now). Below this is a 'Mark as' menu with options like 'Mark as Retrieving' (circled in red with a '4') and 'Add To Book Strap/Sticker Print Queue' (circled in red with a '3'). A metadata table on the right lists fields like 'Max Cost', 'Need Before', 'Requested on', 'Referral Date', 'Due Date', 'Item Barcode', and 'Shipped Date'. At the bottom, a detailed record for the book is shown, including 'Title', 'Author', 'ISBN', 'Publisher', 'Format', 'Language', 'Preferred edition', and 'Verification'. A 'Local ID' field is circled in red with a '2', and an 'Availability Status' field is circled in red with a '1'. A 'Search my library's online catalog' link is also visible.

Tipasa® Home  
Discover Items  
Find Options

215123012: Human competence : engineering worthy performance  
Previous Request Next Request

Print Shipping Labels  
Group Affiliations: TEST

Apply constant data:  
Actions:  
Note Mark as Considering Save Email Print Now

Mark as Considering Print Now  
Mark as Verifying Add To Request Print Queue  
4 Mark as Retrieving Add To Book Strap/Sticker Print Queue  
Mark as Scanning 3  
Mark as Packaging

Max Cost USD 0.00  
Need Before 10/03/2022  
Requested on 09/02/2022  
Referral Date 09/02/2022  
Due Date 10/02/2022  
Item Barcode  
Shipped Date 09/02/2022

Capital City (4)  
Can You Supply? (4)  
New - Copies (1)  
New - Loans (3)  
Human competence : engineering worthy perform...

Lenders  
Request Tags Choose...

Title Human competence : engineering worthy performance  
Author Gilbert, Thomas F  
ISBN 9780787996154 0787996157  
Publisher San Francisco : Pfeiffer, ©2007.  
Format Book  
Language English  
Preferred edition Any edition  
Verification WorldCat (103769424) Physical Description: xxxviii, 376 pages : illustrations ; 24 cm

Search my library's online catalog  
Local ID 2 Main Branch, MAIN-Stacks, LB1062.6 .G54 2007

Open Access  
No links found  
Local Holdings  
Branch Main Branch  
Shelving Location MAIN-Stacks  
Call Number LB1062.6 .G54 2007  
Holdings Source OPAC  
Availability Status 1 Available (Checked 4 days ago)  
Symbol TS259

# Workflow for a loan request (with OPAC integration)

TS259 Reg ID: 127968

215191219: Social media tools and platforms in learning environments

Previous Request Next Request

Lender:  
If multiple holdings, click **View Local Holdings**

Print Shipping Labels

Group Affiliations: TEST

Apply constant data:

Actions: Note Mark as Considering Save Email Print Now

Request Staff Notes 0

Type Loan

Source WSILL

OCLC 731916658

Lenders \*TS259

Request Tags Choose...

Max Cost USD 0.00

Need Before 10/07/2011

Requested on 09/07/2011

Referral Date 09/07/2011

Due Date 10/07/2011

Item Barcode

Shipped Date 09/07/2011

Title Social media tools and platforms in learning environments

Author White, Bebo; King, Irwin; Tsang, Philip

ISBN 9783642203916 3642203914 (e-ISBN)

Publisher Heidelberg ; New York : Springer-Verlag, ©2011.

Series Computer science

Format Book

Language English

Preferred edition Any edition

Verification WorldCat (731916658) Physical Description: xviii, 435 pages : illustrations ; 24 cm

[Search my library's online catalog](#)

Local ID

Open Access  
No links found

**Local Holdings**  
[View All Local Holdings \(3\)](#)

Symbol T0259

Summary Local holdings available.  
Format Unknown [zu]  
Location EAST EAST-Stacks

Summary Local holdings available.  
Format Unknown [zu]  
Location MAIN MAIN-Stacks

Summary Local holdings available.  
Format Unknown [zu]  
Location NORT NORT-Stacks

# Workflow for a loan request (with OPAC integration)

Lender:  
Select holding and click **Apply**

215191219: Social media tools and platforms in learning environments

Can you  Print Shipping Labels  **Group** TEST

Apply constant data:

Actions:

Request  0

Type  Max Cost USD 0.00

Local Holdings

Results 1 - 3 of 3

Branch	Shelving Location	Call Number	Holdings Source	Availability Status Checked less than 1 hour ago	Selected
North Branch	NORT-Stacks	LB1028.3 .S635 2011	OPAC	Available	<input checked="" type="radio"/>
Main Branch	MAIN-Stacks	LB1028.3 .S635 2011	OPAC	Checked Out, Due 12/22	<input type="radio"/>
East Branch	EAST-Stacks	LB1028.3 .S635 2011	OPAC	Not Available	<input type="radio"/>

Format Book  
Language English  
Preferred edition Any edition  
Verification WorldCat (731916658) Physical Description: xviii, 435 pages : illustrations ; 24 cm

[View All Local Holdings \(3\)](#)  
Symbol TS259  
Summary Local holdings available.  
Format Unknown [zu]  
Location EAST EAST-Stacks

# Workflow for a loan request (with OPAC integration)

Lender:  
Local ID now populated with location and call number for selected holding

TS259 Reg ID: 127968

215191219: Social media tools and platforms in learning environments Previous Request Next Request

TEST

Apply constant data:

Actions:

Note Mark as Considering Save Email Print Now

Request Staff Notes 0

Type Loan

Source WSILL

OCLC 731916658

Lenders \*TS259

Request Tags Choose...

Max Cost USD 0.00

Need Before 10/07

Requested on 09/07

Referral Date 09/07

Due Date 10/07

Item Barcode

Shipped Date 09/07

[Search my library's online catalog](#)

Local ID North Branch, NORT-Stacks, LB1028.3 .S635 2011

**Open Access**  
No links found

**Local Holdings**

Branch North Branch

Shelving Location NORT-Stacks

Call Number LB1028.3 .S635 2011

Holdings Source OPAC

Availability Status Available  
(Checked less than 1 hour ago)

[View All Local Holdings \(3\)](#)

Title Social media tools and platforms in learning environments

Author White, Bebo; King, Irwin; Tsang, Philip

ISBN 9783642203916 3642203914 (e-ISBN)

Publisher Heidelberg ; New York : Springer-Verlag, ©2011.

Series Computer science

Format Book

Language English

Preferred edition Any edition

Verification WorldCat (731916658) Physical Description: xviii, 435 pages : illustrations ; 24 cm

# Workflow for a loan request (without OPAC integration)

## Lender:

1. Search my library's online catalog
2. In local catalog: Verify availability; Copy call number
3. Paste call number
4. Add to Book Strap/Sticker Print Queue
5. Mark as Retrieving

TPV Reg ID: 83742

Previous Request Next Request

Apply constant data: DEFAULT

Actions: Note Mark as Considering Save Email Print Now

Mark as Considering Print Now

Mark as Verifying Add To Request Print Queue

Mark as Retrieving 5 Add To Book Strap/Sticker Print Queue 4

Mark as Scanning

Mark as Packaging

Request Details (Request ID 202631553)

Status Submitted

Type Loan

Source WSILL

OCLC 103769424

Lenders \*TPV

Borrower

Max Cost USD 0.00 (IFM)

Need Before 04/30/2012

Requested on 03/30/2012

Due Date 04/27/2012

Shipped Date 03/30/2012

Get it in the library

1 of 1 available 2

Location	Status	Call number
Library - 3rd Floor	Not Checked Out	LB1062.6 .G54

Language English

Preferred edition Any edition

Verification WorldCat (103769424) Physical Description: xxxviii, 376 pages : illustrations ; 24 cm

Search my library's online catalog

Local ID LB1062.6 G54 3

Open Access No links found

Local Holdings

Search Google Scholar

Search Google Books

# Workflow for a loan request

Print Queue: [Lending Book Straps/Stickers \(4\)](#)

- Tipasa® Home
- Discover Items
- Find Patrons
- Borrowing Requests
- Document Delivery
- Lending Requests
- Purchasing Requests
- Off-System Requests
- Print Queue (17)**
  - Borrowing [Remove All \(13\)](#)
    - Requests (7)
    - Book Straps/Stickers (6)
  - Lending [Remove All \(4\)](#)
    - Book Straps/Stickers (4)**
  - Purchasing
    - Print All

Results 1 - 4 of 4  Rows

<input checked="" type="checkbox"/>	ID	Media Type	Title
<input checked="" type="checkbox"/>	215191219	Book	Social media tools and platforms in learning environments
<input checked="" type="checkbox"/>	215123012	Book	Human competence : engineering worthy performance
<input checked="" type="checkbox"/>	215123001	Book	Here on earth : a natural history of the planet
<input checked="" type="checkbox"/>	215122996	Book	Women in American Indian society

Results 1 - 4 of 4


Format:   
Paper Size: US Letter

Lender (student worker):

1. Open Print Queue > Lending > Book Straps/Stickers
2. Select requests
3. Print

# Workflow for a loan request

US TRAINING LIBR (TS259)

 **1**

LOCAL ID "215123012"  
Main Branch, MAIN-Stacks, LB1062.6 .G54 2007

TITLE  
Human competence : engineering worthy performance

AUTHOR  
Gilbert, Thomas F

VOLUME  
ISSUE  
ARTICLE AUTHOR

ARTICLE TITLE

DATE  
PAGES  
ISBN 9780787996154 0787996157  
ISSN

DUE DATE 10/02/2022

BORROWER TPV  
SUPPLIER TS259

Tipasa® Home

- Discover Items
- Find Patrons
- Borrowing Requests
- Document Delivery
- Lending Requests
- Purchasing Requests
- Off-System Requests
- Print Queue (17)
- Manage Copyright

Lending Priorities:



- Capital City (2)
- Can You Supply? (6)
- New - Copies (1)
- New - Loans (1)
- Considering - Loans (4)
- Retrieving (4) **2**

Lending Requests: Retrieving (4) TS259 Re

Options Apply constant data:

Print Shipping Labels  Print Book Straps/Stickers

[Remove all](#) Results 1 - 1 of 1 Limit of 100 requests

	ID	Media Type	Title	Borrower	Time To Resp
	215123012		Human competence : engineering worthy performance	TPV	< 12 hours








**3**

[Remove all](#) Results 1 - 1 of 1 Limit of 100 requests

**Packaging** **4**

Batch respond to "Can You Supply" items [Yes](#) [No](#) [Considering](#) [Verifying](#) [Scanning](#)

Results 1 - 4 of 4 Rows

	ID	Media Type	Title	Borrower	Time To Respond	Tags
	<a href="#">215122996</a>		<a href="#">Women in American Indian society</a>	TPV	< 12 hours	
	<a href="#">215123001</a>		<a href="#">Here on earth : a natural history of the planet</a>	TPV	< 12 hours	
	<a href="#">215123012</a>		<a href="#">Human competence : engineering worthy performance</a>	TPV	< 12 hours	
	<a href="#">215191219</a>		<a href="#">Social media tools and platforms in learning environments</a>	TPU	> 5 days	

Lender (student worker):

1. Get books from shelf
2. Open retrieving queue
3. Scan request barcodes
4. Batch update to "Packaging"

# Workflow for a loan request

Tipasa® Home

Search for requests

Request ID

Active Requests  Closed Requests

Lender (another student worker):

1. Scan request barcode
2. Print shipping labels
3. Print book straps (if not previously printed)
4. Respond Yes

TS259 Reg ID: 127968

215123012: Human competence : engineering worthy performance [Previous Request](#) [Next Request](#)

Can you supply?  Yes  No - No reason given  Conditional - Additional info needed

Print Shipping Labels  Print Book Straps/Stickers

Affiliations: TEST

Apply constant data: Actions:

Request

Request Details (Request ID 215123012)

Status	Considering (Packaging)	Borrower	TF
Type	Loan	Max Cost	USD 0.00
Source	WSILL	Need Before	10/03
OCLC	103769424	Requested on	09/02
Lenders	*TS259	Referral Date	09/02
Request Tags	Choose...	Due Date	10/0
		Item Barcode	
		Shipped Date	09/02/2

Title Human competence : engineering worthy performance [Search my library's online catalog](#)

Author Gilbert, Thomas F

ISBN 9780787996154 0787996157

Local ID Main Branch, MAIN-Stacks, LB1062.6 .G54 2007

Publ San Francisco : Pfeiffer, 2007



# Workflow for a copy request



Metadata Interlibrary Loan Analytics Admin

Tipasa® Home

- Discover Items
- Find Patrons
- Borrowing Requests
- Document Delivery
- Lending Requests
- Purchasing Requests
- Off-System Requests
- Print Queue (8)
- Manage Copyright

Tipasa® Home

Search for requests

Request ID

Active Requests  Closed Requests

Frequently Used Tags

All Tags (4)

Lender: Lending Priorities

Lending Priorities:

Capital City (5)

Can You Supply? (9)



New - Loans (5)

Considering - Copies (4)

Retrieving (4)



Quick Links

Borrowing:

[New For Review \(8\)](#)

[Not Reviewed \(8\)](#)

Received

[Overdue \(2\)](#)

Returned

Lending:

**Lending Priorities**

[Capital City \(5\)](#)

**[Can You Supply? \(16\)](#)**

[New - Copies \(2\)](#)

[New - Loans \(10\)](#)

[Considering - Copies \(4\)](#)

[Retrieving \(4\)](#)

Supplied

[Overdue \(9\)](#)

Returned

[Returned/In Transit \(6\)](#)

[Returned/Complete? \(6\)](#)

Document Delivery:

Other:

- [OCLC Policies Directory](#)
- [OCLC Service Configuration](#)
- [OCLC Usage Statistics](#)
- [OCLC Article Exchange](#)
- [Resource Sharing News](#)
- [WS ILL Training Resources](#)
- [OCLC Community Center](#)

# Workflow for a copy request

- Tipasa@ Home
- Discover Items
- Find Patrons
- Borrowing Requests
- Document Delivery
- Lending Requests
- Purchasing Requests
- Off-System Requests
- Print Queue (8)
- Manage Copyright
- Lending Priorities:
  - Capital City (5)
  - Can You Supply? (9)
  - New - Loans (5)
  - Considering - Copies (4)
  - Retrieving (4)
  - Supplied (6)

TPV Reg ID: 85742

Lending Requests: Retrieving (4)

Options  
 Print Shipping Labels  Print Book Straps/Stickers

Apply constant data:

[Remove all](#) Results 1 - 1 of 1 Limit of 100 requests

	ID	Media Type	Title	Borrower	Time To Respond
	207753329		IEEE transactions on components, packaging, and manufacturing technology.	TPU	> 2 days

[Remove all](#) Results 1 - 1 of 1 Limit of 100 requests

**Scanning**

Batch respond to "Can You Supply" items [Yes](#) [No](#) [Considering](#) [Verifying](#) [Packaging](#)

Results 1 - 4 of 4

	ID	Media Type	Title	Borrower	Time To Respond
	<a href="#">207755608</a>		<a href="#">Twentieth-century music.</a>	TSF	> 2 days
	<a href="#">207753329</a>		<a href="#">IEEE transactions on components, packaging, and manufacturing technology.</a>	TPU	> 2 days
	<a href="#">206617850</a>		<a href="#">The American journal of economics and sociology.</a>	TPU	> 2 days
	<a href="#">206606326</a>		<a href="#">IEEE computer graphics and applications.</a>	TPU	> 2 days

Lender (student worker): Click + to move request to Scanning queue

# Workflow for a copy request

207755608: Twentieth-century music. Previous Request Next Request

Can you supply?  Yes  Print Shipping Labels  Print Book Straps/Stickers **Group Affiliations:** ILLD, TEST

No - No reason given   
Conditional - Additional info needed

Apply constant data: Actions:

Request **Staff Notes** 0

Type    
Source WSILL  
OCLC 55970053  
Lenders \*TPV  
URL Type    
URL   
**OCLC Article Exchange**

Request Tags

**Max Cost** USD 0.00  
**Need Before** 05/23/2014  
**Requested on** 04/23/2014  
**Shipped Date** 04/23/2014  
**Borrowing Notes** , his is

**Lender: After scanning article, click **Article Exchange****

**Title** Twentieth-century music.  
**ISSN** 1478-5722 1478-5730  
**Publisher** Cambridge [England] : Cambridge University Press, 2004-  
**Format** Periodical/Article  
**Language** English  
**Article Title** On Musical Mediation: Ontology, Technology and Creativity  
**Article Author** GEORGINA BORN  
**Volume** 2  
**Issue/No** 1  
**Issue Date** March 2005

[Search my library's online catalog](#)  
**Local ID**

**Open Access**  
No links found  
**Local Holdings**

[Search Google Scholar](#)  
[Search Google Books](#)

# Workflow for a copy request

**207755608: Twentieth-century music.** Previous Request

**Can you supply?**  Yes  Print Shipping Labels  Print Book Straps/Stickers **Group Affiliations:** ILLD, TEST

No - No reason given

Conditional - Additional info needed

Apply constant data: Actions:

Request Staff Notes 0

Request Details (Request ID 207755608)

<b>Status</b>	Considering (Scanning)	<b>Borrower</b>	
<b>Type</b>	Copy <input type="text"/>	<b>Max Cost</b>	
<b>Source</b>	WSILL	<b>Need Before</b>	
<b>OCLC</b>	55970053	<b>Requested on</b>	
<b>Lenders</b>	*TPV	<b>Shipped Date</b>	
<b>URL Type</b>	Article Exchange <input type="text"/>	<b>Borrowing Notes</b>	
<b>URL</b>	207755608.pdf		
	<a href="#">OCLC Article Exchange</a> <input type="button" value="Drop File"/>		
<b>Request Tags</b>	<input type="text" value="Choose..."/>		

**Title** Twentieth-century music. [Search my library's online catalog](#)

**ISSN** 1478-5722 1478-5730 **Local ID**

**Lender: Attach article and Drop File**

# Workflow for a copy request

207755608: Twentieth-century music.

Previous Request Next Request

Can you supply?

Yes

- Print Shipping Labels
- Print Book Straps/Stickers

Group Affiliations: ILLD, TEST

No - No reason given

Conditional - Additional info needed

Apply constant data: Actions:

DEFAULT

Note

Mark as Considering

Save

Email

Print Now

Request

Staff Notes 0

Request Details (Request ID 207755608)

Status Considering (Scanning)

Type Copy

Source WSILL

OCLC 55970053

Lenders \*TPV

URL Type Article Exchange

URL <https://worldcat.org/ILL/AE/qYyefJuo8>

[OCLC Article Exchange](#) Preview Cancel

Password WhAmBjAW

Request Tags Choose...

Borrower

Max Cost

Need Before

Requested on

Shipped Date

Borrowing Notes

Lender:

- If necessary, **Preview**
- **Click Yes**

Title Twentieth-century music.

[Search my library's online catalog](#)

# Simulation tips

In most web browsers, you can

- Press **Ctrl** and **+** to make the display bigger
- Press **Ctrl** and **-** to make the display smaller

# Simulation tips

If you're not sure what to do next, most simulation screens have a Hint button at the top

Simulation: Tipasa lending workflows

WorldShare®

Need Help? ▼ Tipasa Trainer  
User support info

Metadata Acquisitions Circulation **Interlibrary Loan** Analytics Admin

Tipasa® Home

Discover Items

Find Patrons

Borrowing

Documents

Lending

Can You

New - Loan

After the end of the contemporary of history

Considering -

Retrieving (1)

Supplied

196745862: After the end of the contemporary art and the pale of history

TS259 Reg ID: 127968

Previous Request Next Request

Hint

Status is Available and location and call number populate Local ID field, so

- ~~Add to Book~~
- ~~Strap/Sticker print queue~~
- Mark as Retrieving

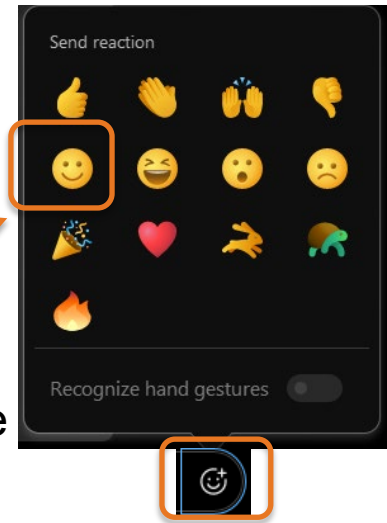
Apply constant data: DEFAULT

Actions: Note Mark as Considering Save Email Add To Book Strap/Sticker Print Queue

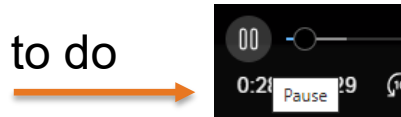
Borrower	TPV
Max Cost	USD 0.00
Need Before	08/01/2011
Requested on	07/01/2011
Due Date	

# Lending workflows simulation

- If you are participating in a live online class
  - See clickable links in Webex chat panel
  - When you have finished the simulation, please click the smile reaction from the bottom of the screen
  - If you finish early, also try the Quiz
  - To open chat panel, click the button at the bottom right of the screen



- If you are viewing a recording
  - Pause the recording (use button at bottom of screen) to do the simulation and quiz
  - See clickable links in Webex chat panel
  - To open the chat panel, click the button in the upper right corner





# Documentation and training



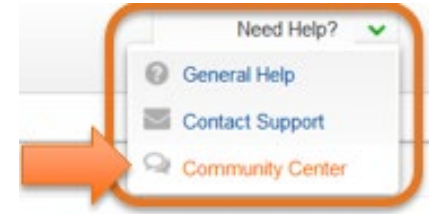
Or directly at

[https://help.oclc.org/Resource\\_Sharing/Tipasa](https://help.oclc.org/Resource_Sharing/Tipasa)

A screenshot of the OCLC Tipasa help page. The page header includes the OCLC logo, 'System Status Dashboard', 'Contact OCLC Support', and 'Tell us'. A search bar contains the text 'How can we help you?'. Below the search bar is a breadcrumb trail: 'Home &gt; Resource Sharing'. The main heading is 'Tipasa' with a sub-heading 'Last updated: Feb 2, 2018'. A paragraph states: 'Tipasa provides new functionality that speeds fulfillment of interlibrary loan requests to save time for your staff and users.' Below this is a link: 'For implementation materials, please see Tipasa Implementation.' The page is divided into several sections: 'Get started' (with links for 'Contact OCLC Order Services' and 'Create a Tipasa account'), 'Article Exchange' (with a link to a guide), 'Print' (with links for 'Print requests', 'Printing for Borrowers', 'Printing for Document Delivery Requests', and 'Printing for Lenders'), 'Tags' (with links for 'Manage Tags' and 'View Tags'), 'User portal' (with a link to a guide), and 'WorldShare Circulation Integration' (with a link to a guide). The OCLC logo is at the bottom left.

# Community Center

- Discussions with Tipasa users in other institutions
- News and events
- Search enhancement requests or contribute your own



A screenshot of the OCLC Community Center website. The top navigation bar includes the OCLC logo and links for Support, Research, Community (highlighted), Developer, and WebJunction. Below this is a secondary navigation bar with 'Community' and dropdown menus for 'Welcome', 'Product Communities', 'Knowledge Communities', 'Events', 'Recordings', and 'Ideas'. The main content area has a green background with a circuit-like pattern and the word 'Tipasa' in large white text. Below the title is a search bar with a dropdown menu set to 'All community' and the text 'Search all content'. At the bottom, a breadcrumb trail reads 'OCLC Community Center &gt; Product Communities &gt; Tipasa'.

# Thank You!

When you exit from Webex, you will automatically be directed to an evaluation form:

- **Instructor:** Rick Newell
- **Class name:** Lending Workflows

Training questions (what's covered in a class, etc.)?

Contact Rick Newell

[newellr@oclc.org](mailto:newellr@oclc.org) or 1.800.848.5878