

Introduction to Tipasa Transcripts

29 January 2026

Transcript

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Hi everyone, I'm Lucia Shelton. I'm part of the member education team at OCLC. I've been training libraries in several countries on OCLC services over the years, including interlibrary loans services. Today I'm facilitating on.

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Learning on Tipasa

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Welcome to our introduction to Tipasa training session. This session is being recorded and you will receive a follow up email message with the link to the recording of this session and the handouts, the copy of the presentation and the learner guide to use.

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As reference.

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Tipasa training is a series of three live led instructor sessions. Introduction to this session, Tipasa borrowing workflows where you learn about borrowing workflows more in detail. And the Tipasa lending.

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Workflows where you learn about the lending workflows in the service.

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You can register for any of the three available sessions or watch an available recording. If you have registered through the community center events page, you are automatically registered to receive a training badge after each session.

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If you did not register through the community center events page or if you are accessing a recording, you can still receive your training badge by completing the form you find on this URL on the screen. When you access this URL, the system prompts you to.

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Going into the OCLC community center using your OCLC symbol or library's name.

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And world share account, ok? Today's session is a high level overview of. We have another two sessions to cover the details.

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The learner guide for the session was available in your registration email confirmation. I'm putting that in the chat as well. So the link for you to retrieve the learner guide. The charts I will use here are available in the learner guide

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We are focusing on four topics. After completing this course, you will have learned the basic concepts of and how the service works. So 1st 1st you will see how.

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Works. Then some important preparations such as automation, patron work form, advanced lending workflows and lending priorities.

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Next, you will have a brief overview of the borrowing workflows in the service. Finally, you will have a brief overview of the landing workflows in Tipasa

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And I will briefly show you the available reports for as well. And of course, I will show you where you find the documentation and contact the OCLC support.

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Let's start with the 1st topic how Tipasa works. 1st, the charts you find in the learner guide are color coded. They are similar to the one you see on the screen. So things that are in blue are things that staff in the borrowing library.

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Those

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Things that are in yellow are things that staff in the landing library does, and things that are in green are things that the patron does. Things in gray, you don't see them on this slide here, but they are in the learner guide. Things in gray are.

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Things that the system does automatically behind the scenes. So in Tipasa, a loan request starts with the patron submitting the request using a form through a discovery tool such as WorldCat discovery.

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Or any discovery layer that you have configured to send open URL links to the. The form is then pre populated with the biographic information and the patron information such as name, library card, number, and email.

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Then the patron can add any additional information such as pickup location or need before date. And the patron is notified of that. The request can start with a blank form made available to the patron to be completed.

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As well as by a library staff member doing that on behalf of the patron, either using the patron form or directly into parts or depending on your library's workflows.

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Libraries using fulfillment integration, your patron is starting your discovery tool in your ILS and then the request is routed to Tipasa. Then the borrowing library.

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From the new for review status opens and approves that request and sends that request to a list of lenders. When automation is configured, automation builds the land string for the request using your custom holdings, your profile.

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For the lenders and can send the request directly to the lenders according to your automation rules. In this situation.

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Only request not matched by automation would arrive in your new for review queue. Then a lender ready to respond the answer to the request can use advanced lending workflows to put the request in different statuses as a staff member is who.

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Working on that before responding.

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Use the the integration to identifies the item that's available on the shelf, and the staff can use the lending priorities queue to manage those priority requests. And then the, then the prepares and ships the item to the borrower and

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Updates the system and the request moves to the status of shipped in transit.

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When the item arrives at the borrowing library, a staff member updates the request to received, then the patron is automatically notified that the item is available. When the patron returns the item.

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Then the borrowing library returns the item to the owner

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And updates the request to returned and the lender then completes, close the request when the item arrives there. And this is for the loan request for the physical item. Let's see the copy request now.

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In Tipasa a copy request also starts with the patron submitting the request and being notified for that or a library staff members doing that on behalf of the patron. The request arrives at the borrowing library at the new for review status to be applied.

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Approved or corrected if needed.

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For borrowing libraries in the United States, your, if your library follows the US copyright, you can have a copyright management enabled. If your library's following the CCG.

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CCL or CCC, the national copyright rules, CCG compliancing with copyright guidelines which means you can request an article five times in a calendar year.

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CCL compliance with copyright law with the fair use for those requests older of those articles older than five years and CCC for copyright clearance center for those rec articles requested more than five times in the calendar year and.

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And that includes a royalty fees, there are costs. Then the system can clear copyright as well.

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Then the system sends the request to your configured list of lenders according to your custom holdings set up. Then a lender responds Yes to the request. Tipasa offers to the lending library their option to.

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Manually change the status of the request during the processing using advanced lending workflows and use the designed the designator queue for their priority libraries. Then after responding yes, the status changed to Shipped

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In transit. When the item arrives at the borrowing library for the copy request, then the borrowing library updates the request to received and the request is automatically closed because there's nothing to be returned. The patron is notified.

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And the file is made available to the patron. The borrowing library can automate the copy process by configuring proven senders, the pre approved lenders for your patron to receive the link to the item to that file directly

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When you have automation configured as well.

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And then the system closed that request of course and I talk about proven senders in detail in the borrowing workflows session. Then if enabled and configured the borrowing library can have requests routed to document delivery.

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Where the borrowing library supplies items from their own collection or from open access materials directly to the patrons. In this situation.

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The patron submits the request, the request is routed to document delivery because the borrowing library owns that item maybe in another format. E.g., print journal instead of electronic and have configured automation.

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Want to route to document delivery as exception.

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The borrowing library then can use the advanced lending workflows while working on the request use the integration to like the lending library does for the system to identify that item in the catalog.

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And the supply then the borrowing library can supply that item to the patron, the patron is notified and the borrowing library closes the request. Any questions so far on loan or copy requests or document.

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And delivery workflows, you can use the chat if you have any questions.

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Now there are some things to consider as configurations for. Let's check some of the options. OCLC implementation.

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team works with your library to discuss and define the best approach in configurations for your library. I will go over the options for your library to consider.

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And there are documentation pages for those configuration options. And I put a lot of links to the documentation on the copy of the presentation. One thing for your level to consider during implementation or later.

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For borrowing physical items is the integration between your circulation and Tipasa. This way you let your local system automate the creation of the temporary record and place a hold for that item for your patron. Then notify your patron.

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When the item is returned, your system checks in the item and deletes the temporary record. You find that the instructions on the copy of the presentation, these are links to the to the documentation for libraries using world share ILS as ILS.

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and for libraries using supported ILS, the list of the supported ILS is on this link here as well. And for 3rd party ILS integration, we use NCIP the circulation interchange protocol to communicate.

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between your

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A Library and OCLC. Now let's check your patron experience with. OCLC implementation team works with your library to check your patron authentication method and.

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Patrons use my account feature like I see on the screen or any special setup that was implemented for your library. Most libraries will have the Petron database migrated or have an existing Patron database from WMS circulation.

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E.g., you might choose to require approval for new patron accounts. And when you require patron approval, once they request ILL for the 1st time, then you will be prompted to approve them based on your library's policies. If.

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What type of patron is eligible to request ILL e.g.. Patron doesn't have a lot of fines or a lot of not returned materials.

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Another option is that you can decide if patrons will be allowed to cancel or renew ILL requests from my account. If your library does not allow, then those options will be hidden. If renewal for physical items.

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Is allowed, this option will only appear after the lender ships the item. If you allow to cancel, this option will be available before a lender ships the item. And you can decide if you wanted to display the patron due date.

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Or let that be done through circulation.

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If so, you might want to hide the patron due date in my account if you don't want that to display. And if you want the due date to appear in my account, you might want to adjust that to give you at least five days to return that item to the owner. E.g..

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If the ILL due date is 21 February

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You might want to adjust the patron due date to be at least February the 16th. So you have customization options for the patron experience and these options are enabled or disabled in the service configuration.

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Under world share ILL and patron settings. Here's where you can choose to display the patron due date, if you allow renewals.

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If you allow cancellations, the number of days to offset patron's due date, the number of active requests allowed per patron

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You can enter the option here and here's also where you can require approval for new ILL patron accounts. So you can check that and then you save for the system to retain that information.

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And this is also where you can set up how long your patron information on the request to be retained in the system here. See select how long data is retained after request is closed. The default is one month, but you have up to 84

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months or seven years to select according to your library's policies. And after you configure everything here, you always save for the system to retain that information.

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There is a question here, you might cover this, but can you configure this differently by patron type? This is something I think, the configuration here is for all the patrons. I can check on that.

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And send you a answer that's more complete if there is a a way for the implementation team to configure that for your library. I'm taking note of your question here and you will receive a follow up on that, ok?

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But here in the service configuration you're doing for all types of petroom.

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Thanks for your question, by the way. For the patron request form, you have different options for the patron request form that your patrons will use.

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Is to initiate ILL requests. So you have the article request for copies, then book requests for book and order for other formats such as audio visual or dissertations, e.g.. This option here is when the patron request.

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Form is running through Tipasa. Some libraries with fulfillment integration will have the patron request form configured through, to go through the ILS, then this option here will be disabled. The request forms will be disabled.

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There is a question here. Currently, you use ILLiad and I believe API automatically approves the patron based off card number. Would this work the same here too? Yes, you can, you can configure, there's a lot of ways for you to configure your patron according.

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What you are using, my account my account in or other ways that your the implementation team can work with the library.

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To check your workflows in the best way to set up for your patrons to be approved and authenticated, ok?

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For libraries configure the patron request form through, most libraries use an article and a book pattern request form. You can enable, you see the option here can enable or disable any.

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The option your library you want to use. E.g..

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If your patrons are only allowed to request ILL for copies, then you can disable the book request form. You can customize which fields will display on the request form, how those fields are labeled. If you don't like the the label that.

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Shows here in the field label, you can customize that. E.g., for the patron ID, you can change to patron barcode or anything else you find more intuitive. Then you can specify which fields are required and which fields the patron can.

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Edit.

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So you can define here. When this required, the patron must completed that, that field. And the patron ID should be one of the required fields. So when the Patron submits the request using the request form, if it matches automation, then automation sends.

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The request to lenders using configured custom holdings. If the request does not match automation.

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Then the request goes to your new for review queue in Tipasa. You can enable and customize notifications in the service configuration under world share LL.

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Then notifications. There are about 25 to 30 notifications that can be either automated or manual, and automated means that they are triggered by an event that happens in.

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23:30

Such as you receiving an item, you're marking as received or an article being available in article exchange, e.g.. And notifications can be sent either through email or text or both.

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Then there are about 50 custom notifications that you can configure. Custom notifications are only sent manually. As a note, excuse me, custom notifications are basically just templates for emails that you can send to patrons that will

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Display in My Account as well.

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And as a borrowing library, you can configure notifications for document delivery as well and landing libraries can configure notifications to be sent to the borrowing library such as requiring additional information or informing that.

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the item is overdue, e.g..

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Some other configurations to consider. These are mostly configured in OCLC service configuration and anything that's configured for your library, be your configurations or your patrons.

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You can work with OCLC implementation team to check the best approach for your library according to your workflows. So the 1st one is of pack integration. This option is available for almost all integrated library system, systems. This means that the system.

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Item using Z39 50 looks up the item in your catalog and populates the request form with the shelf location and availability, then populates the local ID field with the call number.

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This information will be printed on the bookstraps or stickers or full request. And this facilitates retrieving the items from the shelf so when responding to requests as a lender.

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Or when used documented delivery as a borrower. Proven senders is an option for borrowing libraries to select the list of lenders they trust that can supply quality copy of items. So when configured along with automation.

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When a lender supplies a copy request using article exchange, then the item goes directly to the patron without your interventions. And the patron is notified and can access that that document.

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Priorities lending queue is for lending libraries part of consortia or with special agreements with other libraries and want to give special attention to those libraries. So when configured, you'll see a separate queue for those requests and you can configure.

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up to five priorities queues.

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Advanced lending workflows is an option that allows the landing library or the borrowing library using document delivery to manually move the request to different states of the process such as verifying.

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Retrieving, scanning and packaging. This option is very useful for libraries with a high volume of ILL or with more staff working in ILL, so each staff can do, take care of a process. This option doesn't.

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change your days to respond. It's just for you to break it into phases.

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27:37

And of course automation. Configuring rules for automation either as a borrowing or landing library will allow the system to automate the ILL process and move the request without much of your intervention.

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As a borrowing library, you can set up automation for a category of patrons such as undergraduate or graduated students, e.g., and by type of request copy or loan.

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Then borrowing libraries enabling proven senders those lenders you trust that will supply good quality copies or if you enable document delivery and copyright, then it's very important to have automation set up for the system to work on those.

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Functionalities. Automation will find the best video graphic match, check your own collection and collections, apply your configured and selected cancer data.

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28:45

And your custom hold is your preferred lenders, then send requests directly to lenders according to your rooms. As a lender, as a landing library.

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Automation will check among other things your deflection policies for those items you don't supply in your ILL, your supplier status in case you temporarily pause requests, you check your collections.

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29:19

Your real time availability, which is the allowing the system to check, the, if the item is available in the shelf for you to respond and your priority libraries, then send it to your library, those requests.

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29:39

You are ready to respond. So again, OCLC implementation works with your library in configuring automation. And I put links to self paste the automation training and documentation for you to access here in the copy of the presentation.

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30:01

Let's pause here for a minute and check if you have any questions about what was presented so far, and while you're thinking about your question, I have a question for you. So let me open Slido.

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You're here.

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30:31

So the option that allows the system to check online catalog for, for item availability is which option is the correct one?

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Thanks for participating, by the way.

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31:16

I see the majority of you have selected number two. Let's check the correct one. That's all part integration, that's the correct answer. The other options are incorrect advanced to the lending workflows is to move the

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Requests to different statuses

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31:38

Article exchange is to supply copy requests and lending priorities that they are for your priority libraries. Thanks again so now let's have a brief over.

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Overview of these, functionalities from the borrowing and the lending sites in Tipasa interface. Again, I will cover these topics in detail in the Tipasa borrowing and the Tipasa lending workflows training sessions. Let's start with a brief overview.

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Of the borrowing library side.

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So both loan and copy requests start with a patron submitting a request using either the patron form or any other way that was established for your library.

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32:39

Or a library staff member is starting the request on behalf of the patron. So let's go live to have a brief overview of the process for the borrowing library. After that request for a physical item, a long request is submitted.

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32:59

So let me share my browser here So now we are here in to pass interface. If you haven't seen this before, here on the upper right side you where you see your username, this is.

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So where you can change your password and log out from the system, help.

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33:24

General help takes you to the documentation page. Contact support for you to contact those CLC support if you need assistance, and community center this is the easiest way for you to access the community center to participate in discussions and communicate with other libraries.

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33:44

Using the service and learn about anything new about. This is the the language interface, the the options. And here in the middle section you can search for active or close the request using one of these.

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34:04

Index options, here in the quicker links, they are similar options that you find on the left side panel. Under other, the other parts of the service like the policies directory, service configuration.

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And statistics and here admin tab for the staff with admin roles in their account on their account. This is where you can manage and create staff for accounts.

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Using the newer accounts or manage search for the accounts using one of these options, like for the example and then you can.

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35:02

Edit to any information here, if the patron is blocked or approved, you can update this and save it. That's where you go when you need to approve the patron. The request form will take you directly to this area.

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35:24

And the can be configured for branches as well. So when you log in, you would see the list of branches for you to select to use the system. So the loan request, the patron submit.

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35:44

Like to do?

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35:44

And not matched by automation or you have configured to come for you to review, they are under your not reviewed, they will be under here for the borrowing, they will be here under new for review, not reviewed.

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36:04

All under quick links you find the new for review not reviewed as well.

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36:09

So on the not refilled, so I have here this loan request. You can see on the right when the requested this item, the need before date, you can use either the ID link or the title link to open that request.

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And then you can update this as needed. If you need another title of a better record, you can use this magnifying glass here. This would take you to the.

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To a search result, for you to select, you would select that record and apply and then you have that title listed here. You can add tags.

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37:08

Your library can use the tags as custom labels that can be applied to your request. You can, you can use tags to group and keep track of requests, e.g., you could create a tag to assign requests to a staff member. You can select the ones that have already.

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Created or you can create a new one. E.g., I may assign this to this.

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37:35

Staff member, and then you can save it. You can use like e.g. invoicing of of group of types of patrons as well and you can search for those tags.

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And tags are added to individual requests. You can add an internal note, internal note just for your library here on the more actions on the upper right side, you have the option to add an internal note.

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38:07

So you can inform why you're still working this request, if it's the case or you can add a note for the blender, you scroll down to the borrowing.

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38:25

Put the borrowing section here and here in the borrowing notes you can like e.g. NO conditionals, I I needed the entire title, the entire book, then you can save this.

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38:44

If you needed to approve the patron, if you have configured that to manually approve the patron, you'd see a bottom here to approve that patron.

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It's pending approval, then you would click that, go to the paid room, you'll take you to that admin area for the payment account for you to approve that payment. Then after that everything is ok. You use this send request button here.

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39:21

To send it to automation, then automation will apply a constant data in custom holdings and then send you send the request to your configured pre selected lenders. So after you send this request to automation.

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39:40

The system creates a unique request ID for you and then after that request is supplied by the the lender, after the lender answers yes to that request, you would find the request.

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Just here in transit for you to open. You can see in the request the history, you would see the automation that was applied and the lenders that responded to your request. You would see under the request history.

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40:19

And at this point, you can mark this as received, update this, you can use the calendar icon to change the date if the different date than the listed here, added this to the books straps and stickers to to your print queue.

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40:37

Mark this as received. At this point your patron is notified about the request and if circulation integration was configured, then the temporary record is created and the hold is placed for your patron. And you can go to your print queue.

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To print your bookstraps?

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41:02

To send, to make that item available to your patient. Then your request is now here and received the news for you to mark as returned when your patient returns.

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41:22

That item.

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41:23

You can add to the return labels, the shipping labels to the mark as returned, your request is now under returned and it's up to the lender to complete, close that request when they receive that item back. And you can.

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41:43

your print queue can print the return label

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41:47

And ship that item to the owner. So this is for the loan request for the physical items. So there is a question here. What happens if the automation doesn't have any lenders to auto fill? How do you manually select that? That's.

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42:07

A good question. So if the request goes as unfilled, e.g., if that happens, automation doesn't have any lenders, your request to go under the unfilled and then you can open your request.

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42:26

Let me see if I have any. I don't have any. You would select your request and open that and you see this view holdings button here, that's where you can manually select new lenders. So you click this.

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It takes you to this page for you to select lenders for your lender string. So you'd either look into the list of libraries that own that item or use your.

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Custom holdings path, update that request after your lender string is populated manually populated with the new lenders, then you update the request and you can resend this request, ok?

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43:19

You you you might need to, you might need to apply your constant data or change the need before data here, There's a question. Does it only display the one also.

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43:39

OCLC number or do you have to do a new search to see other bibliographic? You only search for new bibliographic record if you need to, but you see this search by this magnifying glass icon here. This is what you use to search for another.

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Record and then we will display all the information, displays all the information because it's coming from the Worldcat database, ok? So it displays everything. So you you only use here if it's missing, if the request is missing information.

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44:15

And this only happens when your is using a blank form, otherwise the system would find a match in the system in the WorldCat database, ok? So this magnifying glass is useful mostly when.

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44:35

The request is coming from blank form. The, as long as it has the.

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44:51

The question your library does not show OCLC number. As long as it has ISSN or ISBN, the system will find that in the database, ok? So it's either one, either OCLC number.

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45:08

Or ISBN or ISSN and this system can find that. So don't worry much about that. So I hope I have answered your questions.

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45:28

If you have other questions you can use the chat

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45:34

How do you indicate to the patron the reason why a request is canceled? If you, if you cancel the request, you notified the patron is notified that the request was canceled.

Timestamp (OCLC)

45:51

If the library, NO library has responded to that request, then you can use your manual notifications to notify your patron for that. That's why your custom.

Timestamp (OCLC)

46:07

Notifications are very useful for you to communicate with the about any issues with that request. That's why your library can have those and you can use those man manual notifications to notify notify.

Timestamp (OCLC)

46:27

Your.

Timestamp (OCLC)

46:35

So we use several different reasons such as checked out, non circulation to new so you can have a multiple. You can inform the cancellation you mean when.

Timestamp (OCLC)

46:54

It's quick dropdown to select the reason and it outfills. The request displays when the lander answers NO to that request. If the request goes in as in field, then it's up to your library to communicate with your paid the notifications with your paid.

Timestamp (OCLC)

47:14

About that request if they still need that request. Is that your question?

Timestamp (OCLC)

47:23

If it's not, you can have multiple, that is, it can be different options why that request was.

Timestamp (OCLC)

47:39

E.g., they send a duplicate request. If they send a duplicate request, you can, your library can have automation for that request to come for your new for review and then in the new for review, you can cancel that request and not in.

Timestamp (OCLC)

47:59

The user the notifications for.

Timestamp (OCLC)

48:01

For your library. Again, if you want to communicate with your the OCLC implementation team, they help you with the notifications to the patron, how you customize those notifications and you can have those preselected

Timestamp (OCLC)

48:21

already for you to

Timestamp (OCLC)

48:23

send that to your patrons, ok? This comes from the notifications. That's how your patron is notified. Copy requests can be automatic if the request matches automation and you have enabled proven

Timestamp (OCLC)

48:43

senders.

Timestamp (OCLC)

48:45

And the lender responds using article exchange, then the patron receives the link to the item directly and access that file. Everything without your intervention. Your copy requests will only arrive at your new for review or copyright queue if automation

Timestamp (OCLC)

49:05

Does not match for any reason. Then you needed to process your copy requests from those queues almost in the same way you process loan request after you completed the missing information.

Timestamp (OCLC)

49:19

And for the people who sent questions in the chat, you will receive follow up messages about your questions with a more complete answer if I did not answer your questions, ok?

Timestamp (OCLC)

49:37

But as I said, your OCLC implementation can work with your library to customize the way you your workflows function for your library to process a request and to communicate with your people.

Timestamp (OCLC)

49:57

If copyright is enabled for copy requests for libraries in the US, you find on the left side the panel under borrowing request, you find the copyright queue.

Timestamp (OCLC)

50:12

Those requests that did not match the automation for copyright and the need action to clear copyright, either edit the title to your copyright table cause when you start using to pass your copyright table will be empty. So many requests you need to be.

Timestamp (OCLC)

50:32

Add to your corporate table and after that.

Timestamp (OCLC)

50:37

It can be cleared automatically by the system, or clear or you need to clear request with copyright fees, then you need to be here for libraries outside of the US, you can what.

Timestamp (OCLC)

50:57

So you do.

Timestamp (OCLC)

50:59

Today, lives in the UK, New Zealand, Australia, Canada and Spain. You can use the petron form to send the copyright declaration and copyright and an acknowledgment. They they need to accept that and then.

Timestamp (OCLC)

51:19

In the terms for your copyright in article exchange. But this option here is available for libraries in US only.

Timestamp (OCLC)

51:29

Hopefully it will be available for other libraries in other countries. Then on the bottom of the left side panel manage copyright queue to manage copyright requests with costs.

Timestamp (OCLC)

51:45

Tipasa does not provide an option to pay pay for those requests, but you can have everything listed on a report you can export.

Timestamp (OCLC)

52:01

For borrowing libraries, if enabled and automation was configured for exception to document delivery, then once the Patron submits the request using the Patron request form, as a borrowing library, then you find the request under the document.

Timestamp (OCLC)

52:21

Delivery queue to supply.

Timestamp (OCLC)

52:24

Your items, either from the quick links or on the left side panel. Automation would route the request to this queue according to your configured rules. Then from the request history.

Timestamp (OCLC)

52:42

You can see that the system automatically routed the request document delivery following your automation rules. Then you can use the advanced landing workflows as well, like the landing library.

Timestamp (OCLC)

52:59

And the integration or the listed here on the body of the request details with the availability and shelf location if enabled, and then you can supply that item to your patron. And documented delivery is useful when the item is available in your library.

Timestamp (OCLC)

53:19

Maybe in another format or it's available in open access. After supplying that item, then the borrowing library marked this as complete to close the request.

Timestamp (OCLC)

53:41

Any other questions?

Timestamp (OCLC)

53:58

Now let's have a brief overview of what happens at the lending library side. Let me share my browser to show that option you're gonna see now the the lending workflows. We saw the borrowing. Now let's see.

Timestamp (OCLC)

54:18

See what happens at the lending side.

Timestamp (OCLC)

54:42

Let me log in to my lending side here so here on the lending side, you find your Can You

Timestamp (OCLC)

55:02

Supply queue either here under quick links or under lending requests this is your Can You supply queue.

Timestamp (OCLC)

55:13

And you find your priority queues here on the bottom, if you have configured, you'll find your lending priorities or in the quick links as well. There's a question here.

Timestamp (OCLC)

55:32

How, how you open a request after I would ask you to send the request directly to all participants so everyone can see it. How you open a request after it's canceled.

Timestamp (OCLC)

55:52

I can I will show you in a bit. Let me just go through the lending side here and I can show you how you can search for that request that was canceled. So from the.

Timestamp (OCLC)

56:13

Lending priorities, your requests will be here under your Can You supply and you'll be under your regular Can You supply too. They are here just to help you to easily find those priority requests. So you can have up to five most of.

Timestamp (OCLC)

56:33

Libraries have just one or two priority queues. So let me open a loan request from the priority queues and do a copy request from the regular supplies for you to see. They are managed in the same way. So for the loan request.

Timestamp (OCLC)

56:53

that request that was sent, you would see here your time to respond on this column here on the right, the ones expiring 1st would be on the top, listed on the top. So you can open that request.

Timestamp (OCLC)

57:09

With OPAC integration was added, then you would see here listed where you see this area here on the right, the shelf location, the availability, and it populating your local ID automatically. If you don't have that, you can use my library catalog.

Timestamp (OCLC)

57:29

Optional to search your catalog.

Timestamp (OCLC)

57:32

Then copy and paste that information here, save it then you can send this to your bookstraps.

Timestamp (OCLC)

57:51

So you can send this to your bookstraps. The bookstrap would print this information as well. Then if you have configured, you can use one of for the advanced lending workflows.

Timestamp (OCLC)

58:07

You can send this to retrieving, e.g., and then your, request would be under the retrieving under the retrieving queue.

Timestamp (OCLC)

58:24

Yeah request is under the retrieving queue. You can repeat several requests like that. You can use the bookstraps as your.

Timestamp (OCLC)

58:39

pick list. So your request will be under retrieving. You can go to print queue and print those bookstraps, you can print them multiple, and those.

Timestamp (OCLC)

58:56

Booktraps would have the local ID here listed and the request ID as well. Then you'd go to your retrieving queue and you can bulk respond when you have multiple requests, and all your requests will.

Timestamp (OCLC)

59:16

Would be automatically moved to the next level as shipped in transit and all your shipping labels would be added to your you see you'd select here if you select yes.

Timestamp (OCLC)

59:35

If you select yes, you would have all your shipping labels for all requests if you're using bulk response. So I can choose this from the retrieving and.

Timestamp (OCLC)

59:51

Yes, you can supply. Shipping labels, submit response, print your shipping labels and supply that item. And if you have multiple requests here, you can scan that barcode that item.

Timestamp (OCLC)

1:00:11

The barcode.

Timestamp (OCLC)

1:00:13

For from the book straps and the bulk respond from the retrieving or you can manually move to the next step, like packaging, e.g.. There is one to answer here. Is there a batch processing

Timestamp (OCLC)

1:00:33

for this we usually do many at once. Yes, you can, there is batch processing. Every time you see this icon here with the arrow, it means that you can batch process.

Timestamp (OCLC)

1:00:45

You see the bulk like I showed you. So your request would be in transit and the borrowing library would work on that request and return and when the request is returned.

Timestamp (OCLC)

1:01:00

Your request will be under returned in transit and then you can close your request when you receive that item. And you can bulk, you can bulk respond complete as well. So every time

Timestamp (OCLC)

1:01:20

you see this icon, you can bulk respond. You can either scan the ID or select the items from the list, and then you can mark as complete.

Timestamp (OCLC)

1:01:40

And everything is closed. So it's pretty easy to use the bulk option, ok? You cannot add more reasons for not supplying. When you bulk responding, e.g. or you are responding.

Timestamp (OCLC)

1:01:58

Individual requests as NO, you cannot use more than one reason. It's just one reason that you can use here, ok? So if you're using NO as response.

Timestamp (OCLC)

1:02:14

You have to choose one reason. And if you're doing this for multiple requests, it's only one reason. Now for the copy request, let's check here from the regular, can you supply the copies?

Timestamp (OCLC)

1:02:33

And you were supplying this request here same thing the ones expiring 1st are here on the top of your time to respond. You open that request. Now you're gonna supply this using article exchange. So you can use the options.

Timestamp (OCLC)

1:02:51

For moving the request from different statuses. If you have a lot of people working on this, you can change this to scanning e.g. or somebody else to scan that material and prepare that material, then use article exchange.

Timestamp (OCLC)

1:03:11

You select the OCR language. OCR , optical character recognition will facilitate the use of that document as PDF, making the PDF searchable.

Timestamp (OCLC)

1:03:29

Editable and you can highlight as well the user can easily use that item. Then you choose that file, I can select my file here that I prepared, send that.

Timestamp (OCLC)

1:03:44

Article exchange creates this unique URL and password and when you choose the response as yes, you can, this is I icon here for you to preview the file if you want to prepare the file before sending that.

Timestamp (OCLC)

1:04:04

Document to make sure that's the correct one.

Timestamp (OCLC)

1:04:08

If it's not, you can delete this file and repeat the process. Then when you choose the yes to, to supply the item, the borrowing library receives the request updated with that information to forward it to their patron.

Timestamp (OCLC)

1:04:28

Or if proven senders was configured.

Timestamp (OCLC)

1:04:32

Then the patron receives that file automatically. So, and the copy request is closed once the borrowing library updates that request or the patron receives that item.

Timestamp (OCLC)

1:04:55

Now let's talk briefly about reports when subscribing to Tipasa, your library receives a

Timestamp (OCLC)

1:05:15

Nine digit authorization and password.

Timestamp (OCLC)

1:05:22

So if you don't have this information, contact OCLC support to retrieve your credentials. The best way is using oc.lc/support, I'm gonna put this in the chat, it's oc.lc/support.

Timestamp (OCLC)

1:05:41

Contact support in case, you don't have your credentials. So for the auto generated reports you access from the homepage under.

Timestamp (OCLC)

1:05:57

OCLC usage statistics in the middle section. And there are a variety of monthly reports available as a borrower and lender such as reasons for NO report with information why the lender responded and noted the request.

Timestamp (OCLC)

1:06:16

Resource sharing lender reasons for NO report, same way the resource sharing stats reports with all the details on the request including costs and dates and the activity overview report with the number of activities in a given.

Timestamp (OCLC)

1:06:36

In a period.

Timestamp (OCLC)

1:06:39

And you can generate customized the report as well from the analytics tab. So let me just briefly show you this. Let me go back to the instance stop to briefly show you.

Timestamp (OCLC)

1:06:58

Where you find those. So for the auto generated reports here, the middle section, usage statistics, you enter your nine digit authorization

Timestamp (OCLC)

1:07:18

Oh, let me show you. Okay your request here.

Timestamp (OCLC)

1:07:36

There's reason for NO report, e.g., they are monthly based that you can update from the list. So it lists here the reason for NO, either as borrower or lender. For the borrower, you can use this to remove those lenders from your custom

Timestamp (OCLC)

1:07:56

Holdings and as a lender, you can use this report to define if you need to create deflection policies. All reports can be exported or emailed.

Timestamp (OCLC)

1:08:09

You can enter several email addresses here separated by semi colon, then if you mark this send monthly, if you check this box here.

Timestamp (OCLC)

1:08:26

Select the format and the style and save it. You can receive this report automatically every month you don't need it to come here to generate the reports, ok? You have to do this to each one of the reports, the resource sharing stats here.

Timestamp (OCLC)

1:08:45

With all the information about the request including costs, how many times the request was requested before. So we have some more complete requests. And the overview

Timestamp (OCLC)

1:09:03

Activity this is one request that you can have for up to 60 months and it shows the number of activities during a certain period for you to check the peak.

Timestamp (OCLC)

1:09:20

Okay. This is the auto generated report. The analytics is for the document delivery reports under analytics reports.

Timestamp (OCLC)

1:09:37

Classic reports, interlibrary loan, you select the document delivery and enter the date range for you to generate those reports. And for custom reports it's analytics reports, classic launchpad.

Timestamp (OCLC)

1:10:05

And then you would have the options to select here and go to home here, you go to applications, Web intelligence.

Timestamp (OCLC)

1:10:24

Then it would request for you to select the universe, which would be interlibrary loan. Let me open here, you select the universe here to be inter library loan.

Timestamp (OCLC)

1:10:46

And after that, you can select the objects for your query. Like e.g., I want the request details, I want the.

Timestamp (OCLC)

1:11:07

The OCLC request, you can drag or you can double click or drag that and then I can select another option here, request item.

Timestamp (OCLC)

1:11:26

I want the request to ISBN, e.g., you can select here and click the arrow or you can double click or drag that. Then after you have this area here populated

Timestamp (OCLC)

1:11:46

with what you want for your report, then you can add the, the query filters.

Timestamp (OCLC)

1:11:55

Like e.g., I want the filter lender unfilled the date by year by direct to this area, select from the list equal to enter the date.

Timestamp (OCLC)

1:12:13

Then I run my report and then after the report is ran, you'd be able to export these to print, to continue to analyze your report. So you you have several options here for you to.

Timestamp (OCLC)

1:12:31

Generate to customize the reports you can you can save these to a public or personal files or other staff in your library. You can export or print this or you can continue analyzing your report and you can use this report to.

Timestamp (OCLC)

1:12:51

Look.

Timestamp (OCLC)

1:12:52

Analyze anything related to the requests or your patrons, ok? And I put in the copy of the presentation, there is a.

Timestamp (OCLC)

1:13:12

A short tutorial feature for their custom reports and our documentation about the reports as well. So you had an overview of how Tipasa works.

Timestamp (OCLC)

1:13:29

You have learned about the configuration options. You have seen the basic workflows for the borrowing library and you have seen the basic workflows for the lending libraries. You have the support portal to contact those support and access documentation.

Timestamp (OCLC)

1:13:49

On the top as discussed here, including configuration options. You'll find the link here on the copy of the presentation and the learner guide as well. The community center for you to participate. And the community center is very useful.

Timestamp (OCLC)

1:14:08

And if you are interested in learning more about borrowing and lending workflows, there are two sessions for you to register or you can access a recording. We are reaching the end of the session. If you don't have any questions

Timestamp (OCLC)

1:14:28

this concludes our session. I would like to thank you for participating and please take a moment to answer the session evaluation, let me get that.

Timestamp (OCLC)

1:14:39

And put in here, let me see if I have here the the evaluation and as I said I I have the copy of your questions here.

Timestamp (OCLC)

1:14:59

Here and I will ask for a more complete answer to be sent to your questions, ok? As I tried to answer here. So, we appreciate your feedback. Thanks again and enjoy the rest of your day.