Tipasa Lending workflows Transcripts

12 February 2026

Transcript

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So hi everyone. I'm Lucia Shelton. I'm part of the member education team at OCLC, and today I'm facilitating your learning on lending workflows. Welcome to our training session. This session is being recorded and you will.

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Receive a follow up email message with the link to find the recording of this session and the handouts, the copy of the presentation and the learner guide to use as reference. I'm sending the link to the learner guide in the chat as well.

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Tipasa training is a series of three live led instructor sessions. Introduction to Tipasa, where you have an overview of how the service works and how you can prepare to use.

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The service. Tipasa borrowing workflows where you learn about the borrowing activities in more detail.

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And Tipasa lending workflows at this session, you can register to either available sessions or access a recording. If you have registered through the community center events page, you are automatically registered to receive a

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Training badge after completing each session. 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. Just.

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Copy this and paste to the browser. When you access this URL, the system prompts you to sign into the OCLC community center using your OCLC symbol or library's name and worldshare account.

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In this session, we are focusing on four topics. At the end of this session, you will have learned about the functionalities for a landing library into. So 1st, you will learn what lending priorities queues are.

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And how you can use them.

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Second, I will explain what advanced lending workflows are and how you can use them. Then I will cover the ways you respond to loan and copy requests from your regular can you supply queue, including using

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Batch processing options and how you can

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respond to loan and copy requests from your lending priorities queues as well. Finally, how to generate statistics reports and of course I I will show you where you find documentation and contact OCLC support.

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So let's start with the concepts of lending priorities. Lending priorities enables you to designate a group of libraries as priority borrowers, those to whom you want to give special service.

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Like a consortia, e.g.. All incoming requests from each of the institutions that you identify as priority borrowers will be visible in a special set of lending queues that you identify under homepage, either under the quick links or.

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On the left side panel.

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As a lender, you can consider lending priorities if your library is a member of a consortium or of a group. If you needed to give priority to requests within your estate or region.

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Your library has reciprocal agreements with other libraries or you want to give special handling to requests from libraries that are on your courier services, e.g..

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And you can configure up to seven lending priorities queues. Many libraries configure one or two priorities queues only. They don't use all five.

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Now let's move to the concepts of advanced lending workflows. The advanced lending workflows feature provides four additional queues within the lending workflows when you are responding to requests: verifying,

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retrieving, scanning, and packaging. As a note, advanced lending workflows does not change your days to respond. This option is to streamline the process when you have more than one person in your library working on ILL, for a.

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So once you enable advanced lending, you will have access

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to the four queues verifying, retrieving, scanning, and packaging, which appear on the upper right side of the request, not right side, it's in the upper side of the request. The interface has changed so now it's

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more to the left. This gives you more options for managing your workflow. You manually moved requests through the queues as you process them prior to responding, and you can move, e.g. to the next

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queue and return to the previous one.

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As you need, but you need to manually move between the advanced lending workflows. Advanced lending workflows can be useful if your library processes high volumes of requests from other libraries or has different

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staff members

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responsible for different steps in the lending process. If your ILL operation is large, you should consider using advanced lending workflows in conjunction with the lending priorities. So lending priorities for your

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Priority libraries, the priority borrowers and the advanced lending workflows is for you to the define the stage as you are responding to the requests.

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This table on the copy of the presentation provides examples of how you use advanced lending workflows depending on the number of staff involved. E.g., for several staff, when you have several staff, you might use all the options.

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While if you are the only staff member taking care of the Tipasa requests, you might not use any of those. And these are suggestions for best practice. Some libraries don't use the verifying

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And the verifying option is mostly used for the library that use this option. It's mostly used when a supervisor needs to check on anything that the.

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Previous person, previous staff or a student worker did with that request. Both lending priorities and advanced lending workflows are configured enabled

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in the OCLC service configuration under worldshare ILL.

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Then advanced workflows. You can have advanced lending enabled, so you check this option here to enable the advanced lending and you can enable the lending priorities as well. And for the lending priorities.

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You need to give a name to your queue, something that you can easily identify, and you must have your custom holdings configured with the list of the borrowers for you to select

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For that specific lending priorities queue. And as I said, you can add more rows up to five priority landing priorities. And I put a link to copy of the.

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The presentation on how to configure custom holdings.

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Now let's talk a little bit about OCLC article exchange. This is part of the service for is it's an option for landing libraries to supply a copy of requested items. And this option is important because configured automation for the patrons to.

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See if the items directly, if the lander is supplying the item through article exchange. And article Exchange accepts large files and each user each.

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Library staff can upload up to thousand files per a day per authorization. And the document expires in 30 days or after viewed five times and does not count when a staff is previewing that file. And, one

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thing that was added to article Exchange is OCR

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Optical character recognition, this is added to the PDF document to make it available for the user to edit, search, and highlight topics within the document. And.

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You, when you are responding using article exchange, you select the language for the document. There are around 120 languages represented and then you upload that document and make that available to the borrower.

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Any questions so far? You can add your questions to the chat if you have any questions.

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Now let's go live to see how everything fits together and how you answer for loan and copy requests from your regular can you supply queue and from your lending priorities queues. Then how you can apply the advanced lending workflows with

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While working on your request. I will show you how you set up your pick list and use batch processing options as well. In both queues, either your regular, can you supply queue or your lending priorities queues, they are managed

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In a very similar way.

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So let me go live here and show you some examples So we are here on

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Tipasa homepage. Let's start with the landing priorities queues. When you enable those queues, you see them either under your quick links, either here in the middle section.

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So this is your lending priorities or you can find them on the left side panel. So let's open from here and you'll see that you have listed here your copies and loans and all these stages the similar way you'll

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Manage your regular can you supply queue. And these requests are also in your regular can you supply queue, but they are separated here for you to easily access those.

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And give a priority attention to those requests. So for the lending priorities, let's use the loan requests as example. So let's open here the loans.

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You can click either the ID link or the title link to open the request and you can see your time to respond. The ones expiring 1st, they would be on the top of the list. You don't need to.

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Follow the order as they are listed here, but the ones expiring 1st are on the top for you to pay attention to those 1st.

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So let's show, some things here. When you have a pack integration or pack integration allows the system to check your catalog to locate that item and.

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Populate that information here in the request. So here is if I scroll down here on the right you can see the location, this is our pack integration. So it's checking the location and the stats, the availability. So this item is available.

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And then the system populates the local ID field. So you have this information and this information is printed on your bookstraps or when you print the request as well. And this facilitates when you are retrieving the items from, from the shelves. So you have that location.

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So, any system that you can use it for setting up real time availability using Z39.50 can use this option, this OPAC integration.

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And, I'll show, in another example, if you have more than one copy, then the system will show the options for you to select which copy you want to use. And if you don't have an OPAC integration, then you can search your online

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catalog to check that location then copy and paste the the local ID here.

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You can add an internal note to this request here on the upper right side, add a note, this is for internal note. This is only within your library. So, e.g., you want other staff to know what you're doing to this request, you can add any note here.

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And that would be part of this request.

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So anybody accessing this request will see this note. Then you can add tags as well. Mainly if you are using advanced workflows, you can add the tags.

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E.g., that, this goes to the supervisor or this goes to the specific staff member in your library, so you can add the name of the person here or you can use one tag that you already have.

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Configured. You can reuse any of those. Then the next step is to add this to your pick list e.g. mainly if you are using batch processing. So on the print options here.

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On the upper right side.

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You select these either to print now, to print the request or you can add it to to your print queue or as bookstraps. And as I said, all the information about the shelf location goes to your bookstraps as well. So let's add this to the bookstraps.

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And then the next step is to if I'm using advanced workflows, so here where you see marked as is where you see the options for advanced workflows, so I can put this on the.

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Living e.g., if another staff is taking care of the next step.

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Going to the shelves to locate this item under retrieving. So now the request is under retrieving, your request will be under retrieving here this queue and then you can go to your print queue.

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And for bookstraps, then print the bookstraps, and the bookstraps, let me let me see if I can get the, the request I just added to the print queue.

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The, the local ID would print on the

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Bookstraps for you to locate that item. Then their staff would locate that item and after the person locates that item, they can go to retrieving to respond yes to that request.

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So on the retrieving, then the request is here, then, the staff could open that request and choose the response to Yes, can supply and then.

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Send that request to the shipping labels to print the shipping labels and submit a response. So.

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Yeah I'm doing this using batch processing, so every time you see this green arrow here, this has the option of batch processing.

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So now let's go back to the loans and additional requests to the list as well. So the next example I'm gonna repeat, e.g., I have several items, so I have to open one by one and add them to my next stage. So now that this request here.

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In this case, the system said that I have more than one copy, as I mentioned before, and then I can open this bottom here and select the copy I want to use. So I want to use this copy here, apply, and now you see that the system completes the.

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Get the local ID?

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And this information will go to the printer queue. So I added this to the bookstraps for the print queue, and I can use the workflows as well and by the way, this is optional. If you're not using this, you, you can.

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Can go straight to choose response and update this to yes after you have the item in hand.

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So I can use the retrieving, this the request is on the retrieving now and now I can do with another one, let me select another one here, this one. In this request, I don't have I don't have.

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Have anything about integration, so when you don't have the integration, you can search your library catalog, and then you can.

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Copy and paste to that information.

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Then you save it and now you send this to the print to the bookstrap stickers.

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And then you can mark this as retrieving as well. There is a question here. How do you change the selected copy in local ID?

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I don't have any other example here, but e.g., you selected the C and are feeling with C two. Let me go back to that request that I chose in the copy.

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Yeah was this one this is the 1II have selected one of the copies. So it's, you see that the system still gives you the option to look back to that.

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List. E.g., if you don't have that one you have selected, you can select a different one and apply, ok? So this is when the system is.

Yeah, when the system shows you to select a record. So now I have all my requests here on the retrieving, they are here on the retrieving all three. I can go to the print queue and print the bookstraps.

My instance is not updating. This is a training instance, so I apologize for this. Let me see if I can get It's still not updating. So you go to the print queue.

And you can select multiple requests at a time, then print those, they would print with the local ID, the shelf location. You can go to the shelf, locate those items, and after you have the items.

In hand, you go to the retrieving queue and here in the retrieving queue you can batch process all those options. So you can use this bulk respond.

This button here on the top, and when you click the bulk respond, then you have the option, e.g., if you want to put them back to the previous stage, you can use the Mark as and put them back to the other option.

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Oh.

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Like e.g. verifying, or you can move them to packaging to the next stage if somebody else is taking care of that, that part. Otherwise, you can either scan the ID that you printed either on the request

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or the bookstraps or you can select them.

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Those you are bulk responding yes. And then you can select the yes, can supply, and select the shipping labels, apply your constant data.

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And it's one for all of the requests at the same time. Then you submit a response and you'll see that all the three requests updated to shipped in transit, and all three were added to your.

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Shipping label and your shipping labels will be in your printed queue for you to select those.

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You can print them all at once and include anything that you'd like to have on those labels. Select the start position, the default is one, but you can change the position if you are you reusing the labels.

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And then you can print those and ship those items to the ball rules. So this is for responding ES, you can respond NO two.

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To those requests. Even if you put it in a in a different queue, you've put in under retrieving, you see that you have the option there to respond Yes or NO.

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So you you have the response here. You can respond to yes or you can use NO to all the requests at once.

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Then let's go back to the loans here. Then there's the option for you to respond to conditional. This is the situation, e.g., you can't supply that item if the borrower accepts your conditions. So e.g., let's open this.

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It request here.

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And e.g. you see all the information about the borrower here on the right side, in the you see all the information about that item, you would see your shelf location as well if you.

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You used OPAC integration, and then you have some conditions to send it to this borrower. So when you choose the response, you can select besides of yes or NO, you can select the conditional. In conditional you have.

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For individual requests there is NO conditionals in bulk response. So for conditional, you select.

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The types of conditions. So these are the options, like e.g. I can select the option that I cannot lend the entire

Book which copies? And this field you see here you can add anything you want or you can add to this text that goes in, in this area, in this message goes to the borrower, so you can add anything, which page.

And then when you respond this and the borrower accepts your conditions. Then the borrower has four

days to take actions. If they don't take actions, then the request moves to the next lender in the lender string.

If they respond to the conditional either in the priorities supply queue or regular cannot you supply queue, in this case we are working under

priorities queue, you see the conditions accepted button then click the request to respond.

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But, before I move to the regular can you supply queue

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From In Transit, you can see that when you ship that item, you can see here when you sent that item. You can still manage the request here.

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When the borrower returns that item and then you can complete that request otherwise the request . stays here. Anything with a

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Question mark is pending of action. Now let's see your regular can you supply queue.

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32:58

Can you hear, can you hear well now? Can you hear well? And by the way, this is being recorded, so you'll be able to watch that.

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That again, and I apologize for that now let's go to your regular Can you supply queue.

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Your regular supply queue can be found either from your home page under quick links so you see your cano supply queue here or on the left side panel.

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under lending requests. So this is your regular Can you supply queue. So you'll see your copies and loans the same way you see in your priorities queues.

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They are managed in the same way. So for the regular can you supply queue, I will select the copies as example and here you have all the copies you have received.

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You can see your time to respond is very similar, the ones expiring 1st to be on the, on the top. And now let's open one of of these requests.

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And for the copy request, you can use the advanced workflows as well. Like e.g., instead of retrieving, you can use the scanning, which will be the next stage. You don't need to print anything because you're not retrieving any material.

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Will, if you have configured for your knowledge base to display here, you would see that as well and to locate that item. And after you have the file ready to be supplied, then you can use.

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Article exchange. This is article exchange, and this is the OCR language, you would select the language from the list here. If you don't select anything English would be the default. Then you choose the file.

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Open that file, and now article Exchange creates this unique URL and password to protect that document and as I said this document is valid for 30 days or.

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For five reviews, after that the document expires, this link expires. You can preview this if you want to see if you attached the correct document, so this eye icon you see here.

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36:19

You'd see that, file to see if you attached the correct one. If you didn't attach the correct one, then you can either click the undo or delete the file and choose the correct file.

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To repeat that. And after you have done that, then you can choose the response. You can apply constant data if it's the case and then you can choose the response yes.

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36:53

Can supply. You can respond NO and you can respond to conditional as well. So for this respond yes.

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37:08

You don't need to print anything here unless you want to print. If you want to print the, the bookstraps or if you want to print the request, you can use the printer options here. Send to print printer now is.

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37:28

For you to print the request right now?

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37:30

Or you can add this to the printer queue. You, you still can't produce this option, ok? And now you can mark this as yes, you can supply.

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37:53

Or you can respond to conditional as well, you can respond to NO and select an option. When you are responding NO you you select the reason, you can choose only one reason. Even when you are.

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Responding NO in batch. So these are the options.

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You can select the reason for you to respond NO to that request and then you submit the response or you can do this in batch. You can batch respond NO.

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38:37

From here from the from the arrow, you can also respond NO to the copy request as well. You can select those and then you can select NO.

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And the reason has to be the same for all the copy requests you are responding now. Okay, you selected the option here. And the deflection policies is very important to avoid for you to manually responding NO to.

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Did a copy or loan for items that you do not supply in ILL.

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So this goes to your reports for you to analyze if you should create deflection policies for certain items.

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And when you respond to yes to copies, the copy request is managed in a different way. There is nothing to be returned. So once the library receives that item, the borrower and updates that request or some borrowers, they configure automation for the item to go direct.

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39:55

Into the patron. Once the patron receives that item, then the request is automatically closed. You don't need to manage anything here. You are only managing here, the physical items.

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For the loan requests, ok? Do you have any questions? Anything else that you would like me to show again? Either from the regular can you supply or.

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From the landing priorities So while you think about your question, let me show you something else here from your configurations. When you go to service the configuration.

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When you go to service the configuration, we'll share ILL, then automated request manager.

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41:09

And the lending tab, the system is when the the system is sending requests to either your Can you supply queue a regular can you supply queue or sending to your lending priorities queues, the system is looking into your automation

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Information configurations by looking into the deflection policies, your supplier status, if you temporarily paused being your supplier.

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Then you wont receive a request during that period, is looking into your knowledge base, your time to respond, and your real time availability. If you have those items available in your library if you, when you have that configured.

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And then according to your automation policies, so you want to have a lot of requests to respond and know manually to them mostly if you have deflection policies, ok?

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So the system is looking into all these configurations you have available.

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I have a couple of questions for you. Let me open the Slido here. Select the correct statement.

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Which one do you think is the correct statement?

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Thanks for participating by the way, and this is just check if you have under understood, if you have understood the concepts explained so far here. And then I can clarify some of your doubts.

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43:36

So let's check the correct answer. The call, the correct answer is lending priority skew is for copy and loan. Bookstraps can be printed for multiple.

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43:55

Requests for multiple items at a time, there is batch process processing option for advanced workflows. You can we can you can do that is under the bulk option, as I showed you.

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You can select the, I can show you again, you can select the the bulk option, then instead of responding, you can select the items and move them to the next stage or the previous stage and workflows. And article exchange is your.

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Used for copy requests. Thanks for participating.

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44:45

Then I have the next question. Which one is not advanced workflows option?

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Let's check the correct answer and the correct answer is printing. Printing is not one of the four. The four, the the four are verifying, retrieving is canning and packaging. Okay, these are the four. Printing is not part of.

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Workflows printing is there.

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On your request detail on the upper right side of the request. Thanks for participating. Let me go back to let me go back to the interface and show you about.

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46:06

The retrieving, let me see here, the retrieving option. So the retrieving, you have the bulk option as well, so you can click this bulk respond option under retrieving or under any of the four queues. It either.

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46:26

Verifying, retrieving, scanning and packaging. If you want to move more than one request back to the previous stage or to the next stage, you can select this bulk respond option. You can scan the local, the.

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Request ID here, or you can select those more than one request. I don't have I don't have more than one here, but you can select more than one request and then I'll mark that request to.

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The next stage of the previous stage. Follow once, ok? So you have the option to bulk process those advanced workflows.

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When subscribing to Tipasa, your library receives a nine digit authorization and password.

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If you don't have this information contact OCLC support to retrieve your credentials at OC.LC/support. So let's check the available report sorry let's check the available reports as a lender

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48:01

So let me go back to I want to show you this live instead of just on the PowerPoint.

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48:10

So let me go live to the interface. So the easiest way for you to access the reports is from your homepage here in the middle section under other.

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You click the OCLC usage statistics. Then you'll need to enter your credentials. Like I said, if you don't have that, you contact the OCLC support to retrieve that information.

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And also offers the option for you to have Tipasa as a group or branches and you can open your institution here. And these are the auto generated reports.

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So the 1st one I'm going to show here is the resource sharing lender reasons for NO report. This is a monthly based report and this report provides the details why you have answered NO to your request. So.

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If there is e.g. deflections, you'd show deflections options, and this is monthly basis that you can change here on the top the month you want for this.

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Report, the next one, the February report will be available on March the 5th is always the 5th day of the, of the following month. So you have the information about the.

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Request ID, the title, and then why you have answered NO. And this report you can use to create and manage your deflection policies. So if your respond manually responding NO to some requests or you.

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If you're not answering to some requests, you can create a deflection policies.

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50:26

And never receive those requests, those type of requests. Another type of report is lender resource sharing stats report. This is a monthly based report as well.

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But provides full detail of your requests including costs, so you have the borrower.

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You have all the information about the request if there is costs involved, and this when you see zero, this is for physical items. When you see one is for articles.

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You can change this is a monthly basis as well. You can update, and then you can see this is for article one.

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51:26

So you see all the information about the article, and then you can see if you received the request for this title before or how many times you received this request in this month. And to have all the information.

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If you, you went through automation, so you'll have all the information for this request and this is a type of report to check where most of your requests are coming from and the most circulated titles in ILM.

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52:04

And if you borrow.

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52:06

If you are a borrower too, you can use this to compare your ILL activities as a borrower and lender. Another report is the lender activity overview report.

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52:27

And this is a type of report that you can generate through up 60 months. So you can update like e.g., I want for the entire year, and this is the type of report that provides information about your ILL activities, and you can.

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You can use this report to check the peak for ILL.

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52:52

Request in your library and your turnaround time as well to supply items. All reports can be exported.

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53:11

Or can be emailed. So e.g. if you add several email addresses and you check this, send monthly, select the format and the style and save it, you receive that report automatically on the email

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addresses listed here. You don't need to manually generate those reports and you have to do this for each report. Another option you have here under this area is assessment tools.

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This you can see check reciprocity reports so those requests you have with other libraries, with agreements and you can see how many times you.

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54:12

Have loaned requests to those libraries and the borrowing and you have borrowed items from them as well. Besides the auto generated reports, you have available.

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54:32

So.

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54:32

Here under analytics, this is where you can generate custom reports. E.g., the auto generated some of those reports are monthly based. So if you want to generate one of those reports for the year or multiple

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years, you can generate here under analytics.

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54:56

Reports and then classic launchpad. This is where you generate the custom reports so it's it's under analytics, then

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You have to select here.

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55:20

Home, let's go to home applications, Web intelligence.

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55:40

Then the universe.

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55:44

Okay, the universe has to be interlibrary loan, and then you can start adding the objects from the left side panel here. From the left side panel, e.g., I want to generate.

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56:04

Report a twelve month report on articles I supplied to libraries. So I go to borrow institution 1st and I want the institution name, you can double click that.

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56:23

I want the symbol as well. You can just click and use the the arrow to add. You can double click or click and use the arrow or you can drag as well. Then I can go to, request item.

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56:42

Now let's go to request the detail 1st and I want the, the request ID, the OCLC request ID.

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56:58

Then on the request item, I want the article title, and I want the ISSN as well.

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57:18

And after you have all the information you want to hear under result objects I can filter my.

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57:31

Query and I want the supplier history to assign the date.

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57:49

Date in year and under list I selected my variable I want to equal to. You can either type the information or use this.

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58:05

Three dashes here to select how you want to enter. I'm going to elect 2025 and I run my report. And after the report is ready, you'll be able to save it as private.

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58:23

Or to share with all the staff in your library, you can export these to an Excel format, e.g., so here you can save it. Or you can print this or export these to an Excel format.

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Like e.g..

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And you see the objects are the columns. So these are objects that I entered, these are my, my columns or you can continue working on on these tables or graphs, charts.

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59:04

Add sales you can continue analyzing and adding information before you save or export to this report. So there are several options for you to use as reports here and to.

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59:24

That's.

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59:27

So here in the copy of the presentation, I put the link to the reports documentation and there's a link also for a short tutorial video and how to generate.

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59:47

Create custom Tipasa reports as I showed you here.

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1:00:05

So you have learned about lending priorities queues and how to use them. You have learned about the advanced lending workflows and how to use them. And you have learned how to respond to loan and the copy requests using either your

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regular can you supply queue or the lending priorities queues which is the same way, including printing and batch processing options. And then how to generate statistics reports.

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We, you have available type of exercise this lending interactive guided tool for you to try to your own pace. You'll be able to choose when there are several staff members at your library and use advanced workflows.

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1:01:04

Or when it's only you a similar process that I did here as an example. Let me add.

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The link to the, to the chat as well. Just give me a second. Let me get that link so you can do some exercises. This will.

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1:01:32

Will help you to understand better how you work the advanced workflows or how you process not using the advanced workflows.

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1:01:42

You can try both if you want.

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1:01:58

You can use the support portal to contact OCLC support and access documentation on the topics discussed here. You'll find the links to those page on the learner guide that I shared at the beginning of the session as well.

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1:02:14

If you have any questions or if there's anything that you would like to see, you can add that to the chat as well, ok? We are reaching the end of this session.

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Sure.

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1:02:36

If you don't have any additional questions this concludes our session. I'd like to thank you for participating and please take a minute a moment to answer the session evaluation and remember you will receive a follow up email message with the link to the recording.

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1:02:56

And the copy of the presentation as well for you to use as reference. Let me put the link to.

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1:03:03

Just a second to the evaluation. Let me get that link for you to easily access it and I put that in the chat.

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1:03:20

I will stop, recording, but I will still be here if you have additional questions, ok?