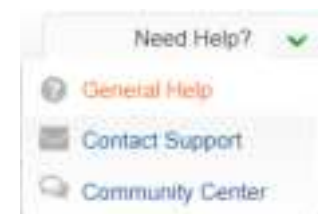# Introduction to Tipasa®

Learning objectives

This course provides a high-level overview of Tipasa. After completing this course, you will be able to describe the major staff and patron features and functions of Tipasa and how they relate to common borrowing and lending workflows. This includes My Account, patron request workforms, automations, advanced lending workflows, lending priorities, copyright management, proven senders, document delivery, and notifications.

Training, documentation, and Community Center

Links are available within the Tipasa staff interface or
- Training and documentation:
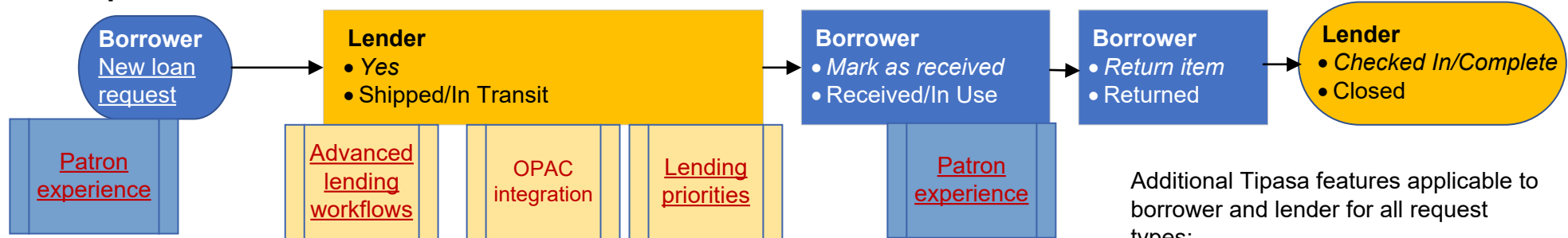 https://help.oclc.org/Resource_Sharing/Tipasa
- Community Center: https://www.oclc.org/community

Smart fulfillment

OCLC recommends using smart fulfillment, including real-time availability for ILL, Automated Request Manager (ARM), and smart lender strings to make your borrowing and lending activities more efficient.

Prepare and plan

OCLC recommends reviewing your records in the OCLC Policies Directory, your constant data, and your Custom Holdings groups and paths. For more information, see Prepare and plan.
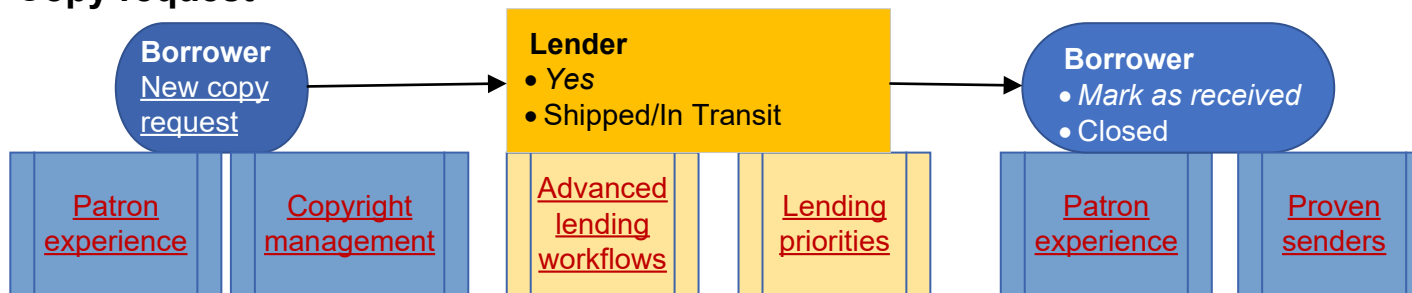
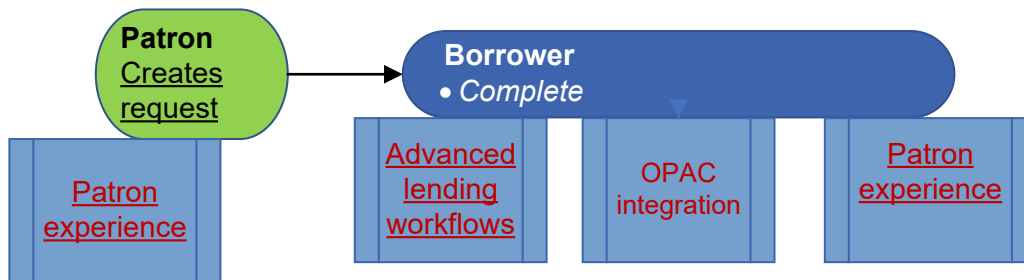# Tipasa® features related to interlibrary loan workflows

Loan request

Borrower
New loan request

Patron experience

Lender
• *Yes*
• Shipped/In Transit

Advanced lending workflows

OPAC integration

Lending priorities

Borrower
• *Mark as received*
• Received/In Use

Patron experience

Borrower
• *Return item*
• Returned

Lender
• *Checked In/Complete*
• Closed

Additional Tipasa features applicable to borrower and lender for all request types:
- Tags and staff notes
- Automations
- Export
- Reports available through OCLC Usage Statistics, WorldShare Reports, and WorldShare Report Designer

Copy request

Borrower
New copy request

Patron experience

Copyright management

Lender
• *Yes*
• Shipped/In Transit

Advanced lending workflows

Lending priorities

Borrower
• *Mark as received*
• Closed

Patron experience

Proven senders

Document delivery

Patron
Creates request

Patron experience

Borrower
• *Complete*

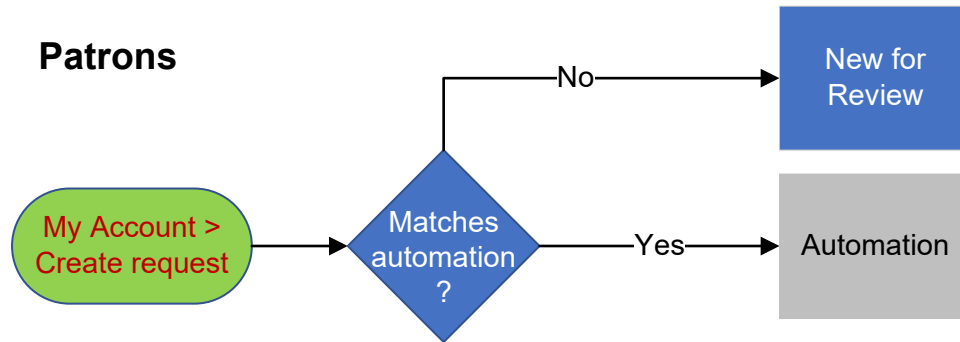Advanced lending workflows

OPAC integration

Patron experience
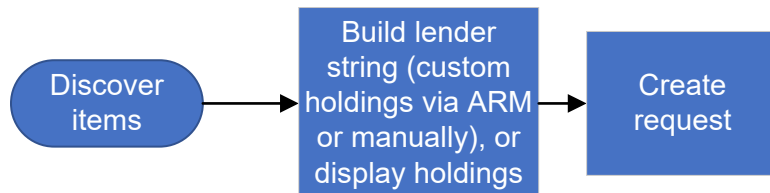
Legend

Tipasa features
- 🟦 Borrowing library staff action
- 🟧 Lending library staff action
- 🟩 Patron experience
- ⬜ Automatic system action

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Sources for new requests

Patrons

My Account >
Create request

Matches
automation
?

No → New for
Review

Yes → Automation

Staff

Discover
items

Build lender
string (custom
holdings via ARM
or manually), or
display holdings

Create
request

Staff

(Borrowing
requests) >
Create
request

Legend

Tipasa features
- ■ Borrowing library staff action
- ■ Lending library staff action
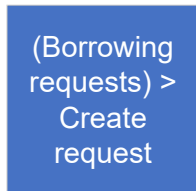- ■ Patron experience
- ■ Automatic system action

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Request workflow

Assuming all available options are enabled

```
Patron submits request on patron workform
  →
Matches automation that sends request to lenders ?
  — No → New for Review → Borrowing library staff edits as needed & sends request
  — Yes ↓
Lending library fills request → Proven Senders workflow, if applicable → Borrowing library staff receive request, if applicable → Patron receives appropriate notifications (and if applicable, article/link are in My Account)
```
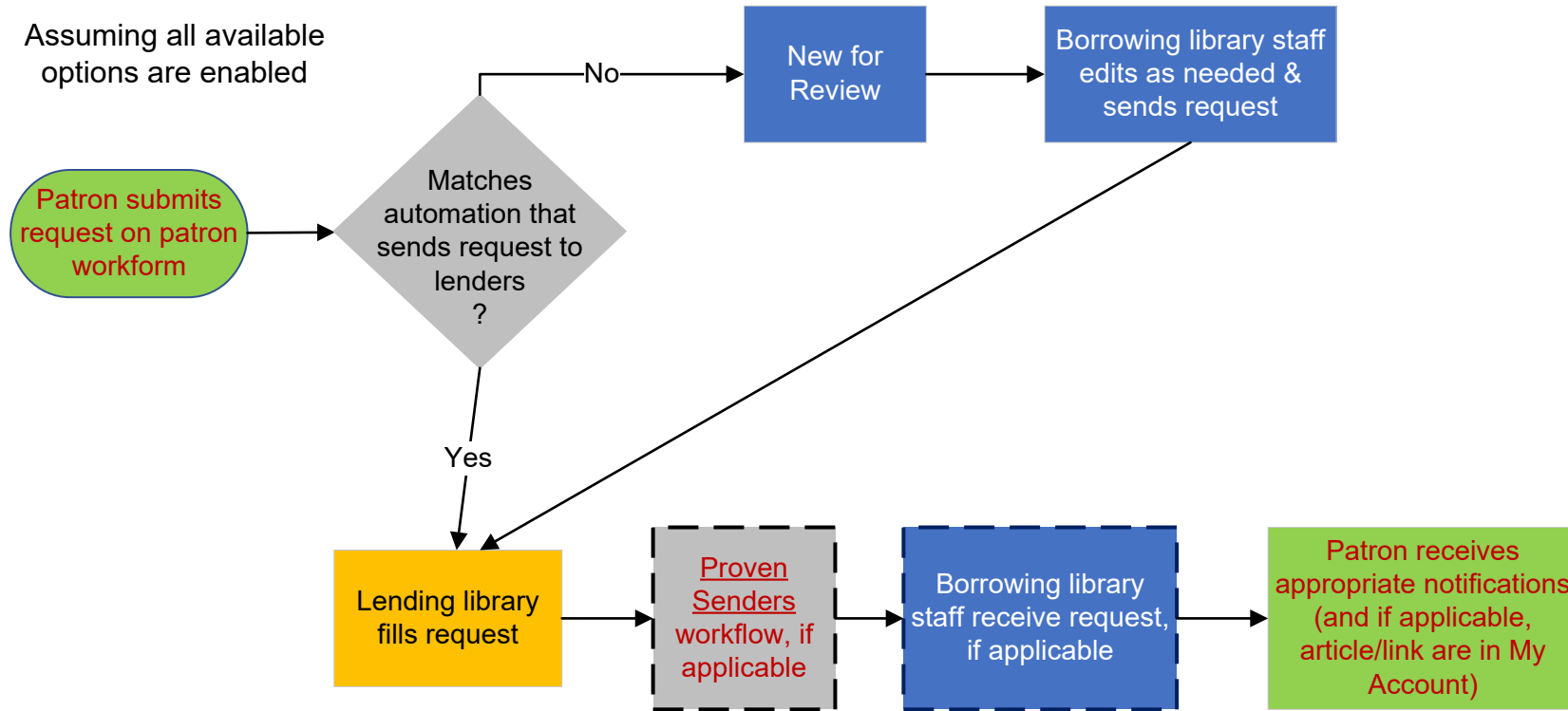
Legend

Tipasa features
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Configuration options for patron experience

Options:
- Require approval for new ILL patron accounts
- Allow patrons to renew requests online
- Allow patrons to cancel requests online
- Hide patron due date (to prevent inconsistency with circulation system), or display patron due date and optionally select number of days to offset patron's due date
- Customize patron request workforms for:
  - Article
  - Book
  - Other
- Enable and customize notifications:
  - Borrowing library to patron
  - Document delivery library to patron

Request workflow

Legend

Tipasa features
- ■ Borrowing library staff action
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Automations

Borrowing automations

- Choose from these actions:
  - Add tags
  - Apply constant data
  - Build lender string
  - Route request to:
    - Review
    - Document delivery, if held
    - Purchase
    - WMS Acquisitions
    - Lenders
- Based on match criteria:
  - Age of material
  - Material format
  - Languages
  - Need before date
  - Patron department
  - Patron note
  - Patron status
  - Patron will pay up to
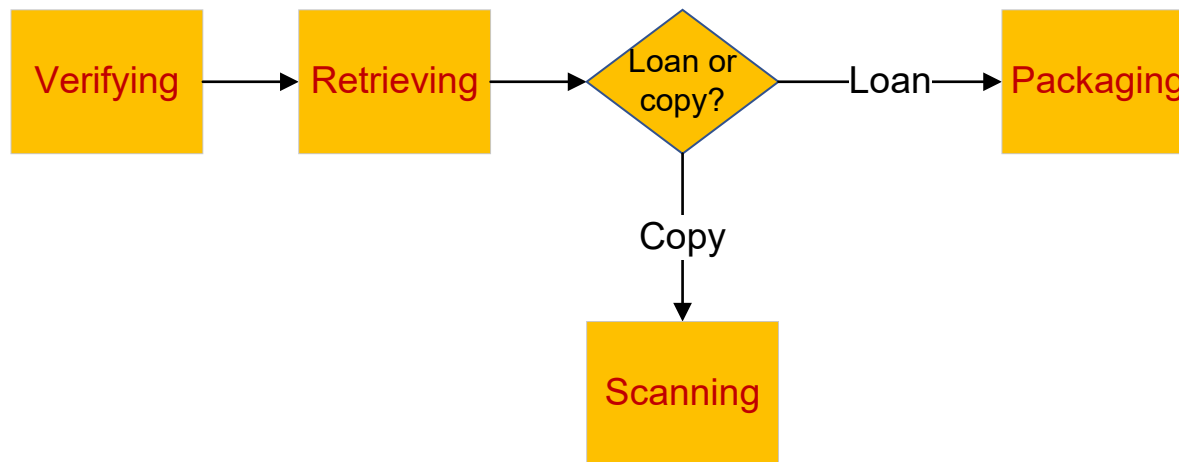 - Request type

Lending automations

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

Legend

Tipasa features
- ■ Borrowing library staff action
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Advanced lending workflows

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```
┌───────────┐      ┌───────────┐        ◇ Loan or ◇   ──Loan──►  ┌───────────┐
│ Verifying │ ───► │ Retrieving│ ───►   │  copy?   │             │ Packaging │
└───────────┘      └───────────┘        ◇──────────◇             └───────────┘
                                             │
                                           Copy
                                             │
                                             ▼
                                        ┌───────────┐
                                        │ Scanning  │
                                        └───────────┘
```

Legend

<u>Tipasa features</u>
- ■ Borrowing library staff action
- ■ Lending library staff action
- ■ Patron experience
- ■ Automatic system action

Lending Priorities

Enable special queues for requests from priority borrowers
- Configure display name
- Filter by custom holdings group or profiled group
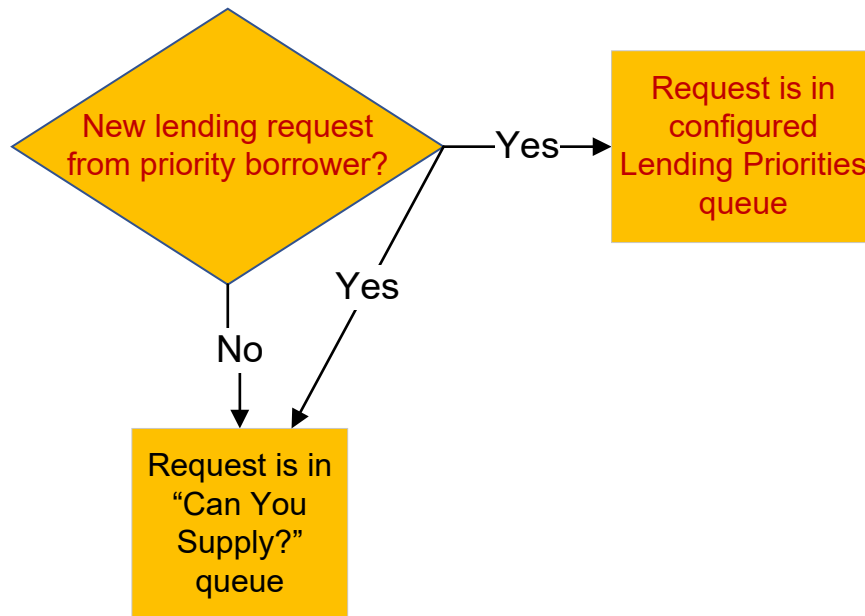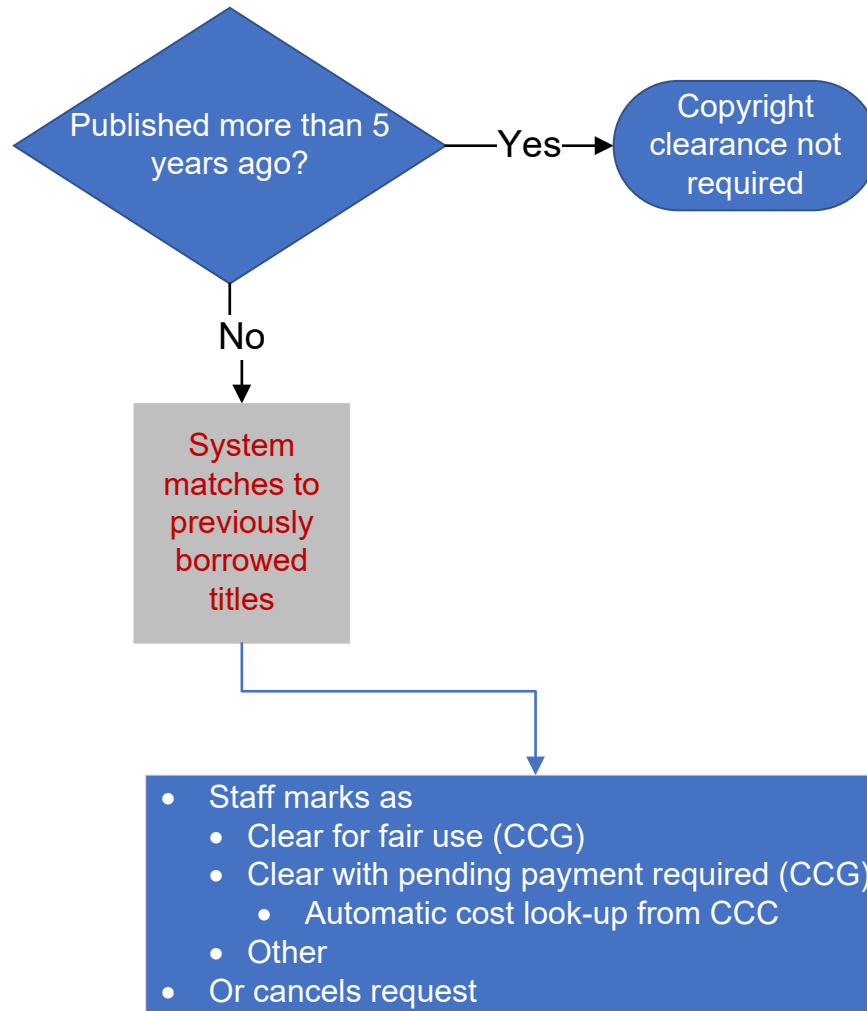

Legend

Tipasa features
- ■ Borrowing library staff action
- ■ Lending library staff action
- ■ Patron experience
- ■ Automatic system action

Copyright management

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Options:
- View copyright clearing in separate queue
- Clear patron-initiated requests for copyright automatically if they match titles used less than 5 times (with appropriate automation)

Published more than 5 years ago? —Yes→ Copyright clearance not required

No

System matches to previously borrowed titles

Additional copyright management functions:
- View and export copyright information by title
- Edit copyright usage information
- Export data about payable copyright fees

- Staff marks as
  - Clear for fair use (CCG)
  - Clear with pending payment required (CCG)
    - Automatic cost look-up from CCC
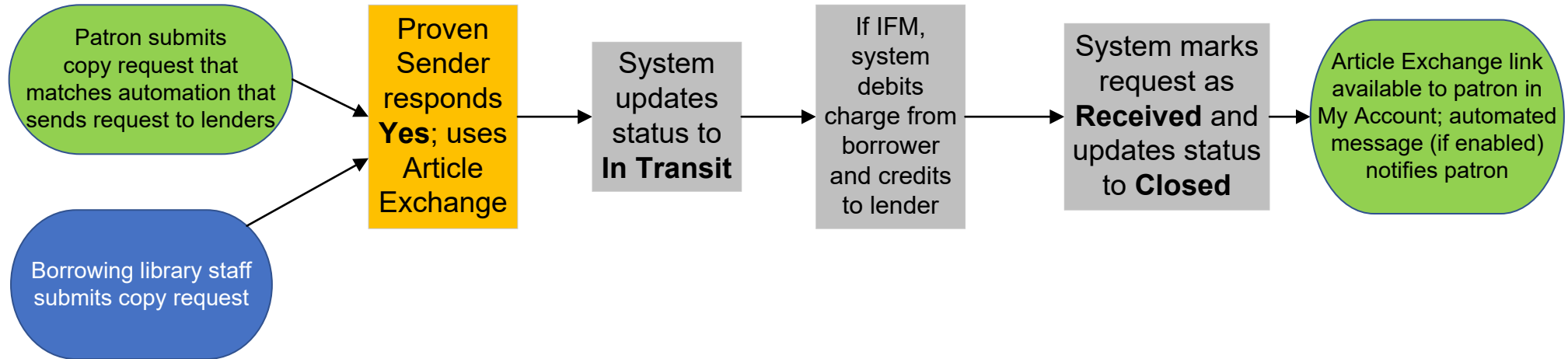 - Other
- Or cancels request

Legend

Tipasa features
- ◼ Borrowing library staff action
- ◼ Lending library staff action
- ◼ Patron experience
- ◼ Automatic system action

Proven senders

OCLC®

Based on a Custom Holdings Group

No staff intervention needed

```
[Patron submits copy request that matches automation that sends request to lenders] ──┐
                                                                                       ├──→ [Proven Sender responds Yes; uses Article Exchange] ──→ [System updates status to In Transit] ──→ [If IFM, system debits charge from borrower and credits to lender] ──→ [System marks request as Received and updates status to Closed] ──→ [Article Exchange link available to patron in My Account; automated message (if enabled) notifies patron]
[Borrowing library staff submits copy request] ──────────────────────────────────────┘
```

You can choose one of these options for Proven Senders:
- Include ALL lenders
- Include only lenders in a Custom Holdings Group
- Exclude only lenders in a Custom Holdings Group

Legend

<u>Tipasa features</u>
- 🟦 Borrowing library staff action
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