

# Introduction to Tipasa<sup>®</sup>

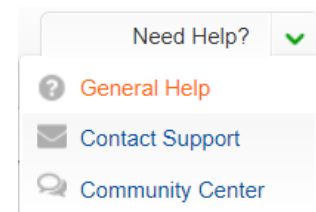
## Learning objectives

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

## Training, documentation, and Community Center

Links are available within the Tipasa staff interface or

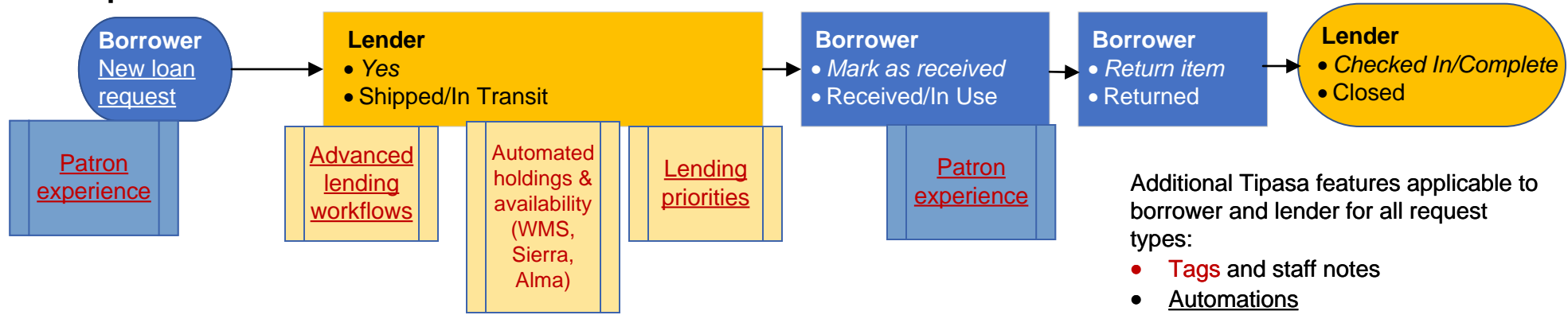
- Training and documentation: [https://help.oclc.org/Resource\\_Sharing/Tipasa](https://help.oclc.org/Resource_Sharing/Tipasa)
- Community Center: <https://www.oclc.org/community>



## 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.

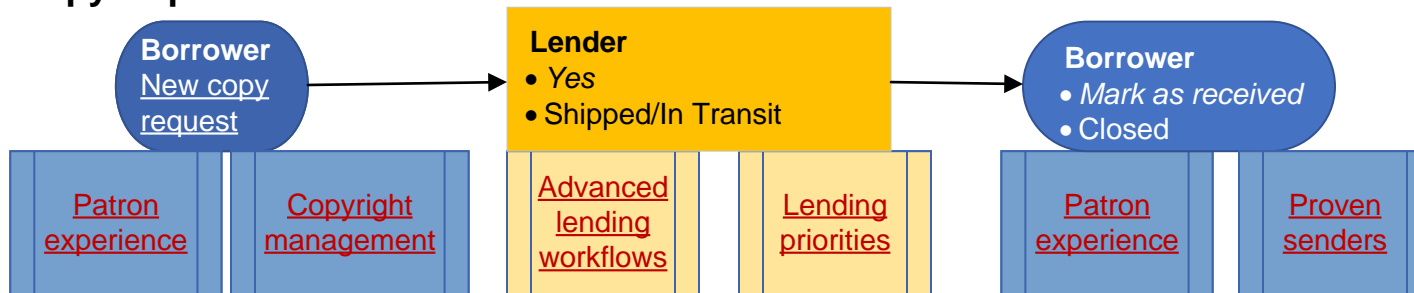
## Loan request



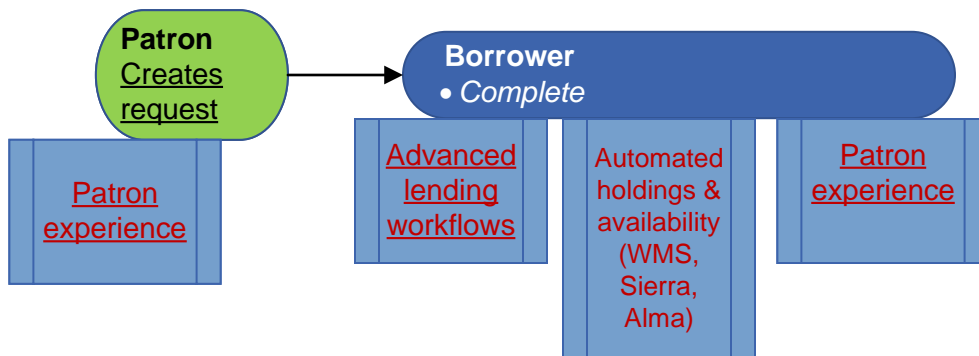
Additional Tipasa features applicable to borrower and lender for all request types:

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

## Copy request



## Document delivery



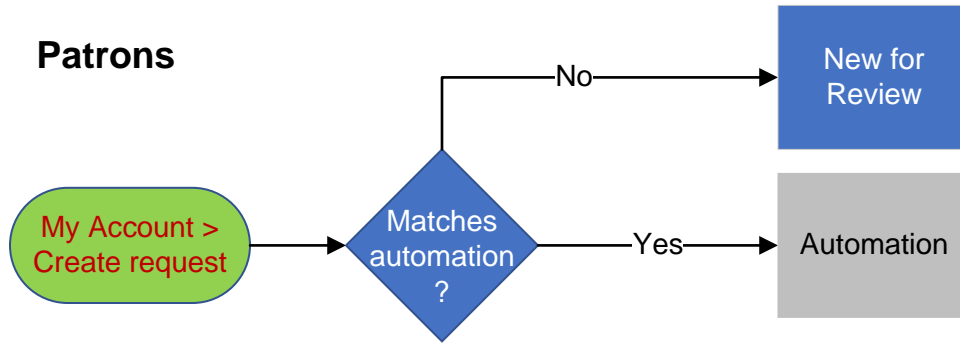
### Legend

#### Tipasa features

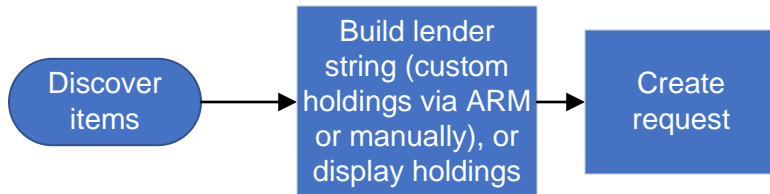
- Borrowing library staff action
- Lending library staff action
- Patron experience
- Automatic system action

# Sources for new requests

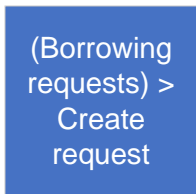
## Patrons



## Staff



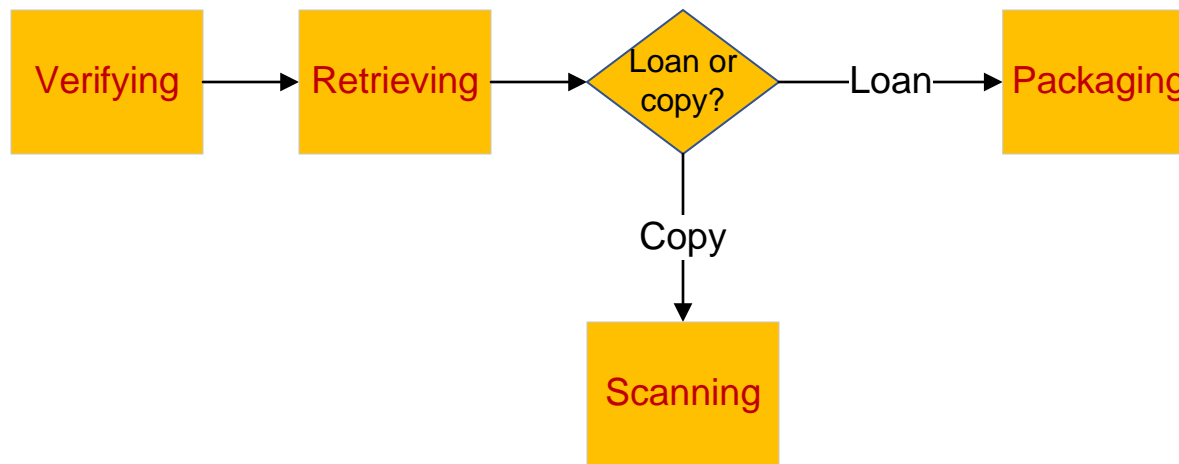
## Staff



**Legend**

Tipasa features

- Borrowing library staff action
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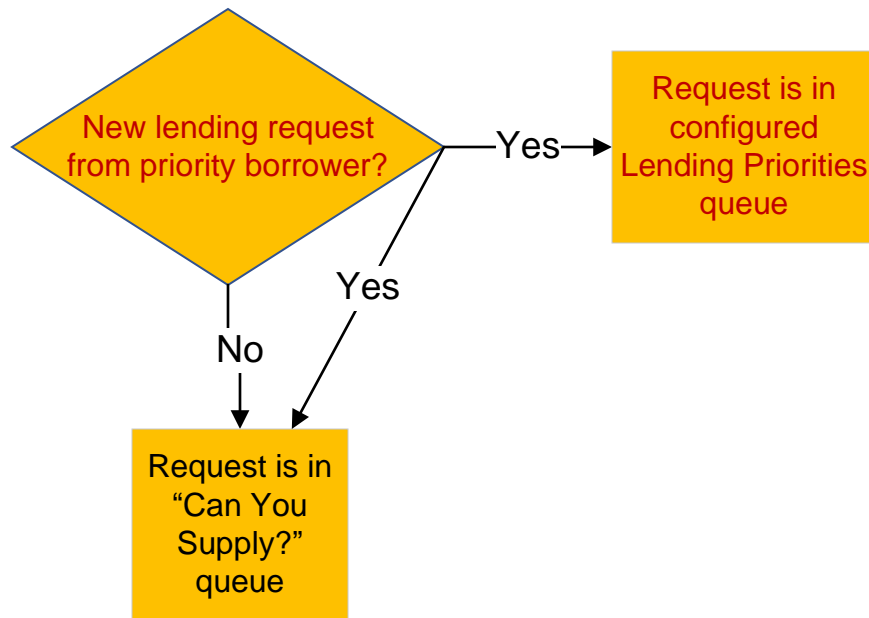
### Legend

#### Tipasa features

- Borrowing library staff action
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Enable special queues for requests from priority borrowers

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



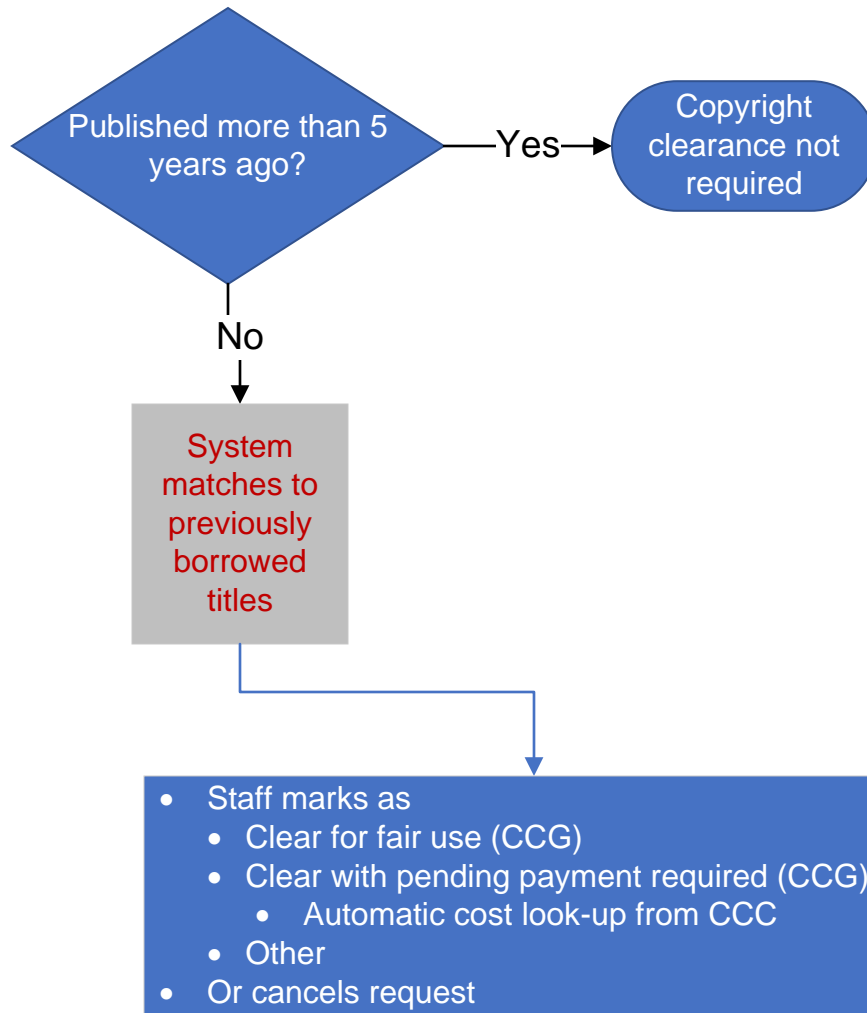
## Legend

### Tipasa features

- Borrowing library staff action
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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)



**Additional copyright management functions:**

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

**Legend**

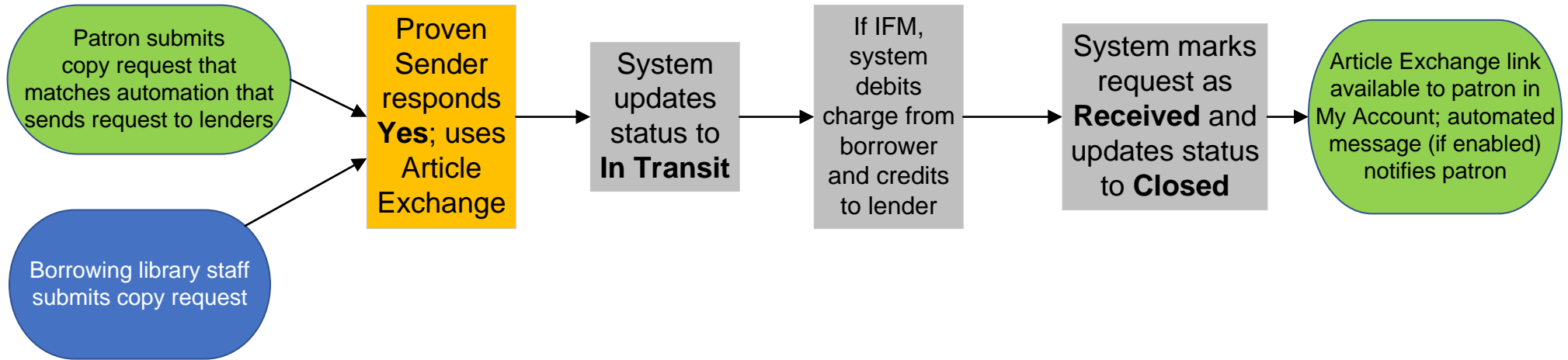
Tipasa features

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# Proven senders

Based on a Custom Holdings Group

No staff intervention needed



**Legend**

Tipasa features

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### Options:

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



### Legend

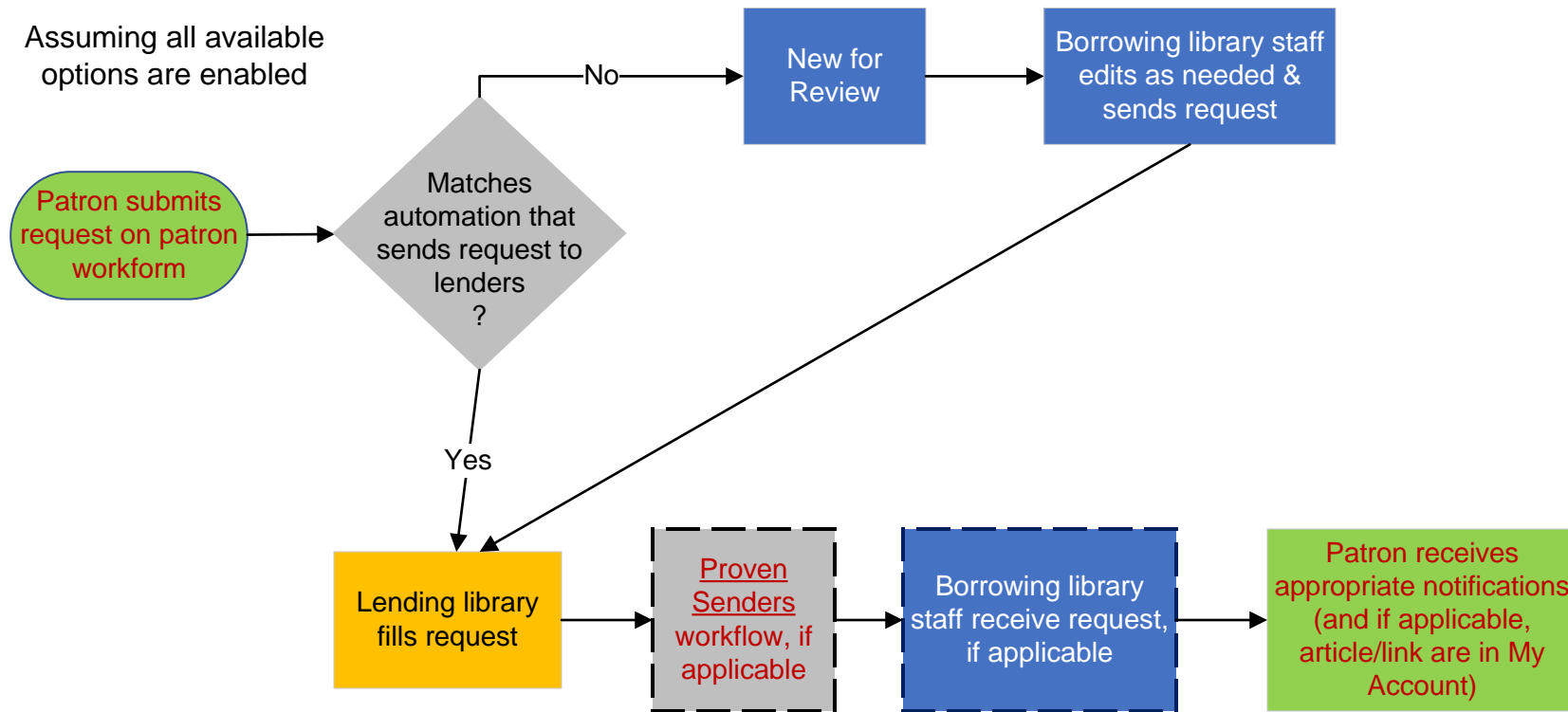
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# Patron workflow

Assuming all available options are enabled



## Legend

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### Borrowing automations

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

### Lending automations

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

#### Legend

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