Create and edit requests

Learn how to create borrowing requests, create requests from an existing requests, create book club requests, edit borrowing requests, and link patron accounts to requests in Tipasa.

Create Request (from a blank workform)

You may search for items using Discover Items and create requests by using the Create Request heading. Clicking Create Request produces a blank workform.

To create a request:

1. Type the details of your request in the fields provided.
2. Optional. To locate citation information, search for Article Title or Title using the "Search Google Scholar", "Search Google Books", or "Search Google" links located to the right of these fields.
3. Optional. Enter a PMID and use the magnifying glass to retrieve citation information from PubMed. If the citation information is correct, select Apply and Save to apply the PubMed citation information to the request.
4. Choose the request Type and Format.
5. Provide a Needed By: date.
6. Apply your constant data record.
7. Provide a lender in the Lender String.
8. Click Send Request. A confirmation message appears and the request appears under the category Borrowing Requests > New For Review.
9. Click Borrowing Requests from the left navigation bar. The list of Borrowing categories expands.
10. Click New For Review.
11. Click your new request ID number.
12. In the new request screen, click Send Request. A confirmation message appears.
13. Choose either View Next Request or Return to list. Your request is sent to the lender and you are returned to the screen you selected.
Create borrowing requests using Discover Items

You can search for items and create a request under Discover Items.

To discover items and create requests:

1. Click Discover Items in the left navigation. When you open the Discover Items tab, an Advanced Search form also opens in the main panel of the screen. See Advanced search for additional information about this function.
2. For a basic search, choose where you would like to search and the type of search from the drop-down lists at the top of the tab.
3. Type your search terms in the box provided.
4. Click Search. Matching results appear, along with holdings display options. When you click Search, the Advanced Search form collapses at the top of the screen. Click Advanced Search to expand or collapse the form.
5. On the Results screen, you may search or view items using one of the following options:
   a. Hover your cursor over the information icon (i) next to the title to see brief bibliographic data.
   b. If available, click the View Now link for open access resources. The resource will open in a new window.
   c. Search for versions with the same title and author by clicking the link. This will launch a new search based on title and author.
   d. To submit a new request, click Create Request. The request workform appears.
6. To display holdings, use one of the following options:
   a. Click **State Holdings, Regional Holdings, or All Holdings**
      
      Note: Regional Holdings includes all holdings in contiguous states.
   
   b. To display holdings from a **Custom Holdings Path** or **Profiled Group**, select that option from the **Filter by** drop-down list. Click **Go** to see results based on the selected filters.
      
      Note: The **Year** and **Volume** filters apply to the selected path or profiled group when creating a copy request for an article from a journal/magazine.

See **Holdings screen** for more information.

7. Use the Holdings screen to see information about the requested item as well as information about the available lenders. See **Holdings screen** for more information. Click **Yes** (or anywhere in the Yes box) to add a Supplier to your lender string.

8. Click **Create Request**. The request workform appears.

9. By clicking on the drop-down button next to **Send Request**, you can choose to **Send Request** or, if you have **automations** configured, **Send to Automation**. Sending to Automation allows you to submit a request without selecting lenders on the holdings screen or applying constant data, provided your automation is set to produce the request. Patron Status and/or Patron Department must be included if you are matching on patron data in your automation. Requests sent to automation are available in the Automation Produced queue.

   - If the automation is set to Build Lender String or Send Request to Lenders, lenders in each Custom Holdings Group in the automation's specified Custom Holdings Path are sorted by turnaround time before being added to the lender string. Requests for articles from print serials will automatically exclude lenders who do not hold the year or volume of the requested item or who have a title-level deflection in the 008 of the LHR for the item. See **Automated Request Manager** for more information.

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10. Apply your constant data record in the Request work form using the **Apply constant data** drop-down list. Data in a field of a constant data record will always overwrite the value shown in the request; however, pre-existing patron data will not be overwritten. When a different Constant Data is applied to a record, the fields are briefly highlighted in green as a visual indicator of the change.

11. On the request workform, provide a **Need Before** date (required).

12. Under **Borrowing Library**, the Address field is required for both Shipping and Billing.

13. Under Lending Libraries, lender policies are listed for any lenders you chose on the Holdings screen. To add more lenders, type the institution symbol(s) of up to 15 of your preferred lender(s) in the Lender String field, separated by commas.

14. Under Patron, you will see an orange triangle with a **Patron Not Linked** message. Add the appropriate patron and link to their Tipasa account to allow the patron to receive email notifications and track the request in My Account. See Link a patron to the request for more information.

15. If applicable, direct notes and supplier history, including reasons for no, will appear under **Request History** after the request is sent.

16. Click **Send Request** if the request is complete. A confirmation message appears and the request appears under the category **Borrowing Requests > Produced > Awaiting Response**. If you wish to save the request to submit in the future, click **Save For Review**.

17. Click **Request ID** in the confirmation message to search that request ID number.

18. The request is re-displayed.
Holdings screen

Display holdings

To display holdings, use one of the following options:

1. Click State Holdings, Regional Holdings, or All Holdings.
   - **State Holdings**: Holdings within your state displayed in alphabetical order by institution name.
   - **Regional Holdings**: Holdings from states or provinces that border your state. Bodies of water are not considered when determining borders. Your institution's state or province is listed first, followed by other states or provinces in alphabetical order.
   - **All Holdings**: Your institution's state or province is listed first, followed by other states or provinces in alphabetical order.
     Note: A line separates holdings for each state and province. Within each state or province, holdings are listed alphabetically by institution name.

2. To display holdings from a **Custom Holdings Path** or **Profiled Group**, select that option from the **Filter by** drop-down list. Click **Go** to see results based on the selected filters.

Note: The **Year** and **Volume** filters apply to the selected path or profiled group when creating a copy request for an article from a journal/magazine.

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Holdings screen view

On the Holdings screen, you have several options:

a. Hover your cursor over the information icon (ℹ️) next to the title of the requested item to see brief bibliographic data.

b. Click Yes (or anywhere in the Yes box) in the Supplier column to add a Supplier to your lender string.
   - Once a lender has been added to the lender string, the hyperlink in the Supplier column will no longer be clickable. If a lender is removed from the lender string, your ability to click on Yes in the Supplier column is restored. This selection status will be maintained as you move through all holdings lists.
   - Yes displays if the library is a current supplier. If they are not, a dash displays in the Supplier column.

c. Click the information icon (ℹ️) next to the library’s name to go the OCLC Policies Directory and confirm a lender’s policies. The OCLC Policies Directory for the lender will open in a new window.

d. Click the library name to go to the library’s online catalog.
   - This link is maintained in the WorldCat registry. For information about configuring your OPAC to display to other libraries and provide deep links to a specific OCLC number or other identifiers, see WorldCat Registry, Configure links to your online catalog.

e. View suppliers’ Days To Respond. The Days to Respond indicates the number of days the library needs to respond to copy and loan requests.
   - If an item is Held by your library, you will see the icon at the top of the Holdings screen, indicating that your library has a holding set on that item in WorldCat. You will also see this icon on the top of the Request work form.

f. View the suppliers Location, which displays abbreviations for the country, and state or provence.

g. View the institution’s OCLC Symbol.

h. The Group column Group column populates when you filter by a Custom Holdings Path in order to show which of
your Custom Holdings Groups contains a potential lender.

i. The Cost column indicates what the library charges for copies and loans as entered in the OCLC Policies Directory.

j. The IFM column will indicate Yes if the library participates in Interlibrary Loan Fee Management.

k. View suppliers' Holdings information. This data is populated from the lending library's local holdings record or knowledge base holdings. If the information has been provided by the library, the column will display Local holdings available or a summary statement of specific volumes and issues held.
   
   ◦ Click on the text in the column to view additional holdings details.
   
   ▪ The resulting Holdings screen will list the Collection and Coverage for the knowledge base holding.
   
   ▪ Local Holdings Records will list the Format, Location, and Holding information.
   
   ▪ The coverage information displayed in the Holdings information sometimes comes from the embargo_info field of the KBART file in the WorldCat knowledge base. See Embargo and moving wall of coverage for more information.

   Note: The citation information for copy requests will display at the top of the Holdings screen and will remain as you scroll through potential lenders. Compare the lenders holding information in the Holdings column to the citation information of the copy request to be sure the lender has the exact volume needed to fulfill the request.

Create request from an existing request

You may also create requests by accessing an existing request with one of the following statuses.

- Conditional
- Considering
- Conditions Accepted
- Submitted
- Not Received
- Complete
- Closed: Any disposition
- Unfilled
- Expired

To create a request from an existing request:

1. Click on one of the statuses listed above, either on the Interlibrary Loan Home page or on the left navigation bar. A list of requests with the given status appears.
   
   Note: Requests with submitted or considering statuses can be found under the Awaiting Response and Automation Produced headings.

2. Click on the Request ID of the item you would like to use to create a request. The request details screen opens.

3. Click the New button in the upper right corner of the request. A new request form open, pre-populated with the information from the original request.
4. Confirm that the information is the same and make changes where necessary.

5. Click **Save for Review**. A message that you have successfully created the request will appear at the top of the page with a hot linked Request ID.

## Create Book Club requests

The Book Club feature allows you to create multiple requests for a single item using a single request screen. Book Club requests are also known as Linked Requests.

**To create multiple requests for a single item:**

1. Locate the item you need to request multiple copies of using a **Basic search**, **Advanced search**, or **Expert search**.

2. On the results screen, find the item you need to request and click **State Holdings**, **Regional Holdings**, or **All Holdings** to open a request screen and view the holdings from one of these categories.

3. On the holdings screen, click the **Quantity** drop down and select the **number of copies** you want to request. Numbered lender string text boxes equal to the quantity you choose will open.

4. To populate the Lender String boxes use established workflows or one of the two suggestions below. You can add up to 15 OCLC symbols to each lender string.
   
   **A.** To create multiple requests using established loan agreements with other libraries, you can either:
   
   a. Manually enter lender strings of libraries that you know hold the item. If you would like to request multiple items from a single institution, enter that library’s symbol in multiple lender strings, OR
   
   b. Select the appropriate tab containing the libraries you know hold the item—**All Holdings**, **State Holdings**, or **Regional Holdings**—then click **Yes** for each lender string for which you would like to use that institution as a supplier.

   **B.** To use **Custom Holdings Paths**, click the **All Holdings** tab.

   1. Select the **Custom Holdings Path** you would like to apply to the lender strings.
   
   2. Click **Go**.

   3. The symbols in that custom holdings path will be distributed evenly among the lending strings, beginning with the first Custom Holdings Group, until all libraries holding the item have been assigned to a string or all of the strings have hit the maximum of 15 symbols. If you have not configured Custom Holdings Paths, see **Custom Holdings Path** for more information.

   - Custom Holdings Paths which contain Profiled Groups can only be completely applied via automations configured in the *Automated Request Manager*. If the Custom Holdings Path has been manually applied, a warning appears. To build a partial lender string from the current Custom Holdings Path that does not include symbols from the Profiled Group, click **OK**. Click **Cancel** to close this window and either manually route this request to automation or select a different Custom Holdings Path.

5. Click **Create Request**. The request screen will open.

6. Add a **note** about the book club request to the Borrowing Notes field in the Borrowing Library form. This note should indicate the following:

   - The request is for book club purposes.
   - There is a desired loan period (for example 30 days).
   - Lenders may receive more than one request to satisfy quantities needed.
Each copy requested should be treated as a single ILL requests and is not a duplicate request. If you make book club requests often, you might want to set up a Constant Data record that includes this information so you do not have to manually enter it every time you make a request for multiple copies. For more information about Constant Data, see Constant data.

7. At the top of the screen, confirm that your request quantity is correct and all lender strings have at least one supplier listed. Click Send Request to submit the multiple requests. A confirmation message will appear at the top of the screen.

8. Click Linked Requests Queue in the confirmation message to review the request. You can also open the Linked Requests Queue by clicking Borrowing Requests > Linked Requests in the left navigation.

9. To review the Status of your multiple requests, in the Linked Requests Queue, click the tab containing the title of the item you requested. A results list with the requests sent to each supplier will appear, and a separate status for each item will be listed in the Status column.

10. Click on a single request's ID to open and view it individually. From the individual request screen, you can move to the next or previous request using the Previous Request and Next Request buttons in the upper right corner of the screen.

11. As items arrive, find the individual requests under Linked Requests, and click Mark as received on the individual item request page.

Edit borrowing requests

In some cases, it is possible to edit requests once they have been submitted. Following are scenarios where editing is currently allowed.

Note: Editing is not allowed on closed requests.

New For Review requests

Edit bibliographic data via WorldCat:

1. Navigate to Borrowing Requests > New For Review.
2. Click the request ID to open the request.
3. Click the magnifying glass icon, next to the Title, Author or standard number fields, to search WorldCat via Discover items.
4. Click the item's title, then click Apply data on the bibliographic record. Alternatively, click a link to holdings, or use a Custom Holdings Path or Profiled group. Then click Update request on the Holdings screen. A confirmation message appears and the request is updated.

Send items through Automation:

Provided you have automations configured, you may send requests through automation. See Automated Request Manager. This option is available for any borrowing request that has not yet been submitted to lenders.

1. Navigate to Borrowing Requests > New For Review.
2. Click the request ID to open the request.
3. Click on the drop-down button next to Send Request and choose to Send to Automation. If the request is
produced with automation, it will appear in the Automation Produced queue. If it is not produced, it will remain in the list for staff review. You can check the Request History to see why it could not be produced, make further changes, and Send to automation again if appropriate.

Add lenders based on holdings:

1. Navigate to Borrowing Requests > New For Review.
2. Click the request ID.
3. Click the View Holdings link to open the Holdings screen.
4. Click Yes in the Supplier column to add a lender. The lender is added to your Lender String.
5. Click Update request.

Produced requests

You may edit a Produced request that has not yet shipped by a lender in the following queues:

- Awaiting Response
- Automation Produced
- Conditional

Link a patron to the request

Under the Patron menu, add the appropriate patron and link to their Tipasa account to allow them to receive email notifications and track the request in My Account.

From the borrowing request:

1. Under Patron, you will see an orange triangle with a Patron Not Linked message. Add the appropriate patron and link to their Tipasa account to allow the patron to receive email notifications and track the request in My Account.
2. Enter the patron's name or Patron ID and use the magnifying glass to search for the Tipasa patron record.
3. After you identify the correct patron, click their hyperlinked name.
4. Click the Apply patron data to ILL Request button. The patron data is applied to the request.
5. The following patron data is applied to the request if it is available in the Patron record:
   1. Patron ID
   2. Name
   3. Phone
   4. Email
   5. Address
      • Address will only populate if there is no SMS text notification number and no email notification address available in the patron record.
   6. Pickup Location