Patron management and notifications

Course description

This course covers all aspects of Tipasa features for interacting with patrons: the User Portal, where patrons can submit and view requests, and access associated Article Exchange, knowledgebase or open access links that were added to their requests; staff management of patron accounts to approve newly registered patrons, or block patrons not in good standing; and activation and customization of patron notifications.

Topics covered include:

• Reviewing the patron experience in the User Portal
• Configuring patron account and request management options
• Customizing Patron Request Workforms in Service Configuration
• Configuring and customizing Patron Notifications in Service Configuration
• Using the Tipasa staff interface, approve or block patron accounts and process requests from patrons

People who should take this course are: staff responsible for assisting patrons in use of the Tipasa User Portal; staff responsible for configuration of patron request forms or notifications or for determining conditions under which requests should be automatically sent to lenders without staff intervention; and staff responsible for approving patron accounts, processing requests from patrons and communicating with patrons throughout the ILL and Document Delivery workflows.

After completing this course, learners will be able to customize the patron request workforms, manage patron accounts and customize notifications, configure patron account and request management options, and assist patrons with User Portal tasks such as setting communication preferences, creating new requests, viewing ILL requests, and viewing knowledge base or Article Exchange articles.

Tipasa training is intended for libraries currently implementing or using Tipasa. If your library is not a member of a current or previous Tipasa cohort, please see these Recordings or email oclcreresourcesharing@oclc.org for information about Tipasa.

Registration deadline for live classes is 2 hours before the session start time.

Register for live, online training

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<thead>
<tr>
<th>DATE</th>
<th>TIME</th>
<th>REGISTRATION LINK</th>
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<tbody>
<tr>
<td>Tuesday, July 14, 2020</td>
<td>2:00 PM - 3:00 PM Eastern Daylight</td>
<td>Register</td>
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### View a recorded session

View a recorded session (64 minutes)

### Course handouts

Class handout - Patron management & notifications

### Request closed captioning

Closed captioning is available in the US upon request with 5 business days' notice. To request closed captioning for a training session, please contact us at training@oclc.org.

### Cancellation policy

In the event of low attendance, OCLC may cancel a training session. In this situation, registrants will be notified by email in advance of the session.