Introduction to Tipasa Transcripts

02 October 2025

Transcript

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0:03

Hi everyone, I'm Lucia Shelton. I'm part of the member education team at OCLC, and I've been training libraries in several countries on OCLC services over the years, including inter library loan service.

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Today I'm facilitating or learning on Tipasa. Welcome to our introduction to Tipasa training session. This session is being recorded and you will receive a follow up email message with the link to find the recording of this session and the handouts. The.

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copy of the presentation and the learner guides to use as reference.

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Tipasa training is a series of three live led instructor sessions. Introduction to Tipasa this session, Tipasa borrowing workflows where you learn about borrowing workflows more in detail and.

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And to parts are lending workflows where you learn about the landing workflows in the service. You can register for any of the three available sessions or watch an available recording. If you haven't registered through the community center events page, you are automatic.

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Registered to receive a training badge after 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 these your.

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All here on the screen. 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 world share account.

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Today's session is a high level overview of Tipasa. We have another two sessions to cover the details. The learner guide for the session was available on your registration email confirmation. I'm putting the link in the chat as well.

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So here's the link to the learner guide. The charts I will use here are available in the learner guide. We are focusing on four topics. After completing the course, you will will have learned the basic concepts of and.

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The how the source works. 1st.

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You will see how Tipasa works, then some important preparations such as automation, patron work form, advanced lending workflows, and the lending priorities.

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Next, you will have a brief overview of the borrowing workflows in the service. Finally, you will have a brief overview of the lending workflows in Tipasa. Of course, I will show you where you find the documentation and.

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And contact the OCLC support.

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Let's start with the 1st topic, how Tipasa works. 1st, the charts you find in the learner guide are color coded. Things that are in blue are things that staff in the borrowing library does, things that are in yellow.

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Are things that staff in the lending library does.

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Things that are in green are things that the patron does, things in gray, you don't see them here on this slide, but they are in the learner guide. Things in gray are things that the system does automatically behind the scenes.

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So in Tipasa, a loan request starts with a patron submitting the request using a form through a discovery tool such as WorldCat Discovery or any discovery layer that you have configured to send.

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Open URL links to Tipasa. The form is pre populated with information and the patron information such as name, library card, and email.

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Then the patron can add any additional information such as pickup location or need before date. Then Patron is notified of that. The request can start with a form made available to the patron to be completed.

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Or by a library staff member on behalf of the petron, either using the petron form or directly interpards depending on your library's workflows. Then the borrowing library from the new for review status.

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Opens and approves that request and sends it to a list of lenders. When automation is configured, automation builds the lender string for the request using your custom holdings, your preferred lenders.

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And can send the request directly to lenders according to your automation rules. In this situation, only requests not matched by automation would arrive in your new for review queue.

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Hey lander, ready to respond here so the request can use a defense as a landing workflows to put the request in different statuses as a staff member is working on that before responding. The OPAC integration department identifies the.

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Item that's available on the shelf.

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And the staff can use the lending priority queue to manage those priority requests, then the lander prepares and ships the item to the borrower and updates the system. The request moves to the in transit status.

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When the item arrives at the borrowing library, a staff member updates the request to receive it, then the patron is automatically notified that the item is available. When the patron returns the item, then the borrowing library returns the item to the owner.

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And updates this system.

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As returned the lender then completes, closes the request when the item arrives there. So this is the loan request for the physical items. Let's see the copy request now.

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Okay.

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In Tipasa, A copy request also starts with the patron submitting the request and being notified of that or a library staff member doing that on behalf of the patron. The request arrives at the borrowing library at the new for reviewing status to be approved or

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Corrected if needed.

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For borrowing libraries in the United States, your library can have a copyright management enabled. If your library follows CCG or CCL, the national copyright rules. CCG compliance with copyright guidelines, which means that.

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That your library can request an article published within five years, five times in a calendar year. CCL compliance with copyright law of fair use for those articles published.

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8:33

Over five years. And the CCC copyright clearance center if the article was published within five years and was used more requested more than five times in a calendar year for the royalty fees.

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8:52

Then the system can clear copyright as well. Then system sends the request to your configured list of lenders according to your custom holdings set up and automation. A lender.

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Responds yes to the request and offers to the lending library the option to manually change the status of the request during the processing using the landing workflows and use the designated queue for the their priority libraries. Then after.

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Responding as the request changes to in transit.

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When the item arrives at the borrowing library, then the borrowing library updates the request to received and the request is automatically closed. The patron is notified.

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And the file is made available to the patron. The borrowing library can automate the copy process by configuring approving senders, the pre approved lenders for your patent to receive the link to the item directly when you have automation.

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Been Configured as well. And then the system closed the request.

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I talk about proven senders in detail in the depart borrowing workflow session. Then if enabled and configured the borrowing library can have requests routed to document delivery where the borrowing library.

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It supplies items from their own collection or from open access materials directly to the patrons. In this situation, the patron submits the request. The request is routed to document delivery because the borrowing library owns that item, maybe in another.

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Format e.g., print journal instead of electronic.

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11:00

And have configured automation to route document to document delivery as exception. The borrowing library can use the defensive lending workflows while walking the request, use the OPAC integration into like the lending library does.

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11:20

And supply that item to the patron. The patron is notified and the borrowing libraries are complete closes the request.

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11:32

Any question on either loan or copy request or documented delivery workflows so far?

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No, there are some things to consider as configurations for tipasm. Let's check some of the options.

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12:02

OCLC implementation team works with your library to discuss and define the best approach in configurations for your library. I will go over the options for your library to consider and there are documentation pages for those configuration options.

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12:20

One thing for your library to consider during implementation or later for borrowing physical items is the integration between circulation and the. This way you let your local system automate the creation of the temporary record.

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12:39

And place a hold for the item for your patron. Then notify your patron. When the item is returned, your system checks in the item and deletes the temporary record.

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You find the instructions on the copy of the presentation for libraries using WMS, the world share management system as ILS or for libraries using a supported ILS. The list of the supported ILS is on the link as well. For.

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Our 3rd party ILS integration, we use.

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NCIP the Niso circulation interchange protocol. Now let's check your patrol experience with the OCLC implementation team works with your library to check your.

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13:39

The patron authentication method.

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13:41

Patrons use my account future or any special setup that was implemented for your library. Most libraries will have the Petron database migrated or have an existing Patron database from WMS so called.

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circulation e.g..

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You might choose to require approval for new patron accounts. When you require a patron approval, once the the request I allow for the 1st time, then you will be prompted to approve them based on your library's policies. If that type of pay.

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Patron is eligible to request ILL. E.g., patron doesn't have a lot of fines or a lot of not returned materials.

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Another option is that you can decide if your patrons will be allowed to cancel or renew ILL requests. If your library does not allow, then those options will be hidden.

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14:49

If renewal for physical items is allowed, this option will only appear after the lender ships the item. If you are allowed to cancel, this option will be available before a lender ships the item. And you can decide if you want.

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To display the patron due date or let that be done through your circulation.

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If so, you might want to hide the patron due date in my account. If you want the due dates to appear in my account, you might want to adjust that to give you at least five days to return that item to the owner.

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E.g., if the ILL due date is October, the 31st, you might want to adjust the patron due date to be at least October the 26th. So you have customization options for the patron experience.

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Yes, these options are enabled or disabled in the service configuration.

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16:02

Well, under world share ILL and patron settings, here is where you can choose to display the patron due date, allow renewals, allow cancellations, offsets the patron's due date.

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16:20

As I mentioned at least five days, and the number of active requests allowed per petrom. Here is also where you decide if you want to approve.

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16:35

Patrons and you, where you set up or how long your patron information on the request will be retained in the system. The default is one month, but you have up to 84 months or seven years to select according to your library's policies.

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Then you save your configurations.

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17:02

You have different options for the patron request form that your patrons will use to initiate ILL requests. Article request for copies, then book requests for books, and order for other formats such as audio, visual or dissertations for.

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E.g.. This option here is when the Patron request form is running through the. Some libraries with a fulfillment integration will have the Patron request form configured to go through their IRS.

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Then this option here will be disabled. For libraries, configuring petron request form through, most libraries use an article and they booked petrom request form.

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17:58

You can enable or disable any option in your library you want to use. E.g., if your pedrons are only allowed to request the ILL copies, then you can disable the book request form.

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18:15

You can customize which fields will display on the request form and how those fields are labeled. If you don't like the default label, you can change them. E.g., the petron.

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18:32

Field, the field called patron ID can be changed to Patron barcode or anything else you find more intuitive. Then you can specify which fields are required and which fields the patron can edit.

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So when the patron submits the request using the request form, if it matches automation, then automation sends the request to lenders using your configured custom holdings. If the request does not match automation, then the request goes.

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19:12

To your new for review queue.

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19:19

You can also enable and customized notifications in the service configuration under world share ILL and notifications. There are about 25 or 30 notifications that can be either automated or manual.

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19:39

Now, and automated means that they are triggered by an event that happens into such as you receiving an item or an article being available in article exchange, e.g.. And the notification can be sent either through email.

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Or text or both.

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There are also about 50 custom notifications that you can configure. In customer notifications are only sent manually. As I note, customer notifications are basically just the templates for emails that you can see on the two patrons that will display in my account.

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Count as well.

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20:26

As a borrowing library, you can configure notifications for document delivery if this option is enabled and landing libraries can configure notifications to be sent to borrowing libraries such as requiring additional information or item overdue for.

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20:54

Some other configurations to consider are OPAC integration. This option is available for almost all integrated library systems. This means that the system using Z39.50 looks up the item in your catalog.

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And populates the request form with the shelf location and availability and then populate the local ID field with the call number. This information will be printed on the bookstraps or stickers or full request. And the.

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This facilitates retrieving the items from the shelves when respond to requests.

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As a lender or when using document delivery as a borrower. Proven senders is an option for borrowing libraries to select the list of lenders they trust that can supply quality copy of items.

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When configured along with automation, when a lander supplies copy request using article exchange, then the item goes directly to the patrom without your intervention.

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Priority lending queue is for lending libraries part of a consortia or with special agreements with other libraries and want to give special attention to those libraries. So when configured, you will see a separate queue for those requests and you can configure.

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Up to five priority queues.

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Advanced lending workflows is an option that allows the lending library or the borrowing library using document delivery to manually move the request to different stages of the process such as verifying.

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22:56

Retrieving, scanning and packaging. This is an option mostly for libraries with a high volume of ILL or with more staff working in ILL. And this option does not change your days to respond.

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23:16

Okay? And this is a link for the documentation for configuration and of course automation. Configuring rules for automation, either.

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23:35

As a borrowing or landing library, we will allow the system to automate the ILL process and move the request without much of your intervention. As a borrowing library, you can set up automation for a category of patrons such as undergraduate.

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Or graduate students, e.g., and by type of request, copy or loan.

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The borrowing library that enabled proving senders those lenders to trust that will supply good quality copies or that enabled documented delivery and copyright, then it's important to have automation set up for the system to work in those functionality.

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24:23

It is.

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24:24

So automation will find the best bibliographical record match, check your own collections, apply your configured and selected constant data and your custom holdings, your preferred lenders, and then send requests directly to.

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24:44

According to your rules. As a lending library, the automation you check among other things, your deflections, your deflection policies for those items you don't supply in ILL.

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25:03

Your supplier status in case you temporarily pause the requests, your collections, your real time availability, and your priority libraries, then send it to your library those requests you are, you are ready to respond.

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25:20

OCLC implementation works with your library in configuring automation. I put the link to the documentation and a link to a self paced training material automation.

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25:36

If needed. Let's pause here for a minute and check if you have any questions about what was presented so far. You can use the chat to send your questions.

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26:08

While you think about your question, I have a couple of questions for you. Let me send you that through Slido, so the option that.

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26:28

Allows the system to check online catalog for item availability is, which option is the correct one?

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26:49

Thanks for participating. This is to check if you understood the concept so far. Let's check the correct answer.

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27:07

The correct answer is OPAC integration. Advanced lending workflows is for the processing article exchange to answer for copy requests and lending priorities is for your priority libraries. So for online catalog OPAC integration.

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27:27

Thanks for participating.

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27:31

The next question, patron notifications are always automatic. Is this true or false?

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27:51

Let's check the correct answer.

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28:11

The correct answer is false. Patron notifications can be manual or automatic and custom notifications are always manual, ok? Thanks for participating. If you have additional questions, you can use the chat.

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28:37

Now let's have a brief overview of these, functionalities from the borrowing and lending sites in Tipasa interface. Again, I will cover these topics in detail in the borrowing and the lending workflows training sessions.

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28:57

Let's start with a brief overview of the borrowing library side.

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29:04

So both loan and copy requests start with the patron submitting a request using a form pre populated with the video graphic information and patron information. So let's go live to have an overview of the process for the borrowing library. After that request for the

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29:24

physical item, a loan request is submitted.

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29:31

Let me share my browser here so we are in Tipasa interface, so let me just show you some things here.

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29:49

Here on the upper right side where you see your username, you have the option to change your password or log out from the system. Help for general help takes you to the documentation pages. Contact support for you to contact OCLC support and community.

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30:09

Center for you to participate in discussions and learn about the new things in this portal where.

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30:16

Other libraries using Tipasa communicate with each other. On the left side panel is where you can manage the request or start a request directly from Tipasa. The middle section is on the top here is where you can search for active or close the requests using

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30:36

One of the indexes.

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30:40

And under quick links you'll find similar options as you can find on the left side panel. And under Other you'll find the other pieces of the service for you to easily access those areas. So.

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30:59

The admin tab you find here is to create and manage staff or Patron accounts. If it's the case. The patron data is uploaded to implementation. If your library is using this option from this tab is

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31:19

Only if you need to create additional patron account or ILL staff account.

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31:24

Using the new user or and you can manage those accounts as well using one of the available indexes. This is a patron account that here

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31:44

You know where you can approve or block the account file and the notifications, the patron has access in my account to define how they want to.

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31:59

Receive notifications. And the homepage here can be configured for branches as well. So when you log in, you would see if it was configured for branches, you would see the list of branches for you to select your branch.

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32:19

Okay loan request, the patron submitted is here under borrowing request new for review, not reviewed those data those requests that did not match automation you would find here.

Timestamp

32:40

Not reviewed

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32:41

And you can see when the request was submitted and the need before date. So let me open one of the requests here you can either click the ID or the title and if you needed to change anything like e.g. you need

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33:01

To Select another bibliographic record, use the magnifying glass icon you see here.

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33:08

Next, next to these areas. It takes you to the search results for you to select another record. So after you select the record, you click the title link and apply data to request.

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33:31

The view holdings is if you need to change the group of libraries you're sending to, so it takes you to that area where you can select that option. You can add tags.

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33:47

Tags are options for you to group and keep track of requests. Your library can create up to 200 tags and they are visible to your library only. E.g., you can select a tag for a request.

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34:04

So this one has one. You can select the ones you have created already or you can create a new one, just type here a new one. Enter and.

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34:24

You added that that tag there and this request will be part of those groups for you to easily track those, those requests.

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34:35

You can add an internal note using this note button here on the upper right side. This is just for the internal staff to see what's happening to that request. And then you can add a note.

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34:53

To the lending library under the borrowing library section here, you can add a borrowing note that goes to the lender, e.g..

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35:09

And then if you have enabled to approve the patron and the patron is requesting for the 1st time, you would see here a button for patron approval. So you would go to that area.

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35:26

To the Patron account and approve that patron and then save and apply that to the, to the request. And after you have done all these changes to the request here to the form, you save these

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35:46

here on the upper right side.

Timestamp

35:49

To save all the information and then after that you can send it to automation. Send request here, you send it to automation for the automation to follow your rules like your constant data, your custom holdings, and then send the request to your configured.

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36:09

Preselected lenders. And after that you would see under the request history, the automation that was applied to your request and the supplier history after the request is.

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36:26

In transit, you'd see here the list of suppliers, the ones that responded no and the one that is supplying that item for your library. Any questions on this area?

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36:56

And this is for the loan request the physical item Now after for copy requests.

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37:12

After Patron submits a copy request, copy requests can be automatic if the request matches automation and you have enabled.

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37:28

Proven senders, your trusted lenders, and the lender responds using article exchange. Then the patron receives the link to the item directly and it can access the file.

Timestamp

37:45

Everything is without your intervention. Your copy requests will only arrive at your new for review or copyright queue if automation does not match for any reason. Then you need to process your copy requests from those queues.

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38:05

Almost in the same way you process loan requests like I showed you after you complete the missing information.

Timestamp

38:20

If a copyright is enabled for a copy requests for libraries in the United States, you'll find on the left side panel under borrowing requests, then copyright those requests that did not match the automation.

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38:40

For copyright and need action to clear copyright, either.

Timestamp

38:46

Lacking information when you see the question mark, slacking information such as ISSN or OCLC number or requests with copyright fees. So you see here how many times it was requested and how many pending requests you have.

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39:06

Then on the bottom, on the left side panel, the managed copyright queue to manage the copyright requests with costs. Tipasa does not provide an option to pay for those requests.

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39:24

But you can have everything listed here on a report you can export. And I put the link to there is a copyright management video with all the details about copyright and.

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39:44

There's a simulation for you to practice a copyright as well.

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39:53

Document delivery for borrowing libraries, if enabled and automation was configured for this exception, then once the patron submits the request using the patron request form.

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40:09

As a borrowing library, then you find the request in document delivery queue to supply your own items either from the quick links or from the left side panel. Automation would route request to this queue according to your configured.

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40:29

Rules, from the request history, you can see the system automatically routed the request document delivery.

Timestamp

40:47

Following your automation rules. Then you can use advanced landing workflows as well and use to identify item availability and location if enabled, then supply that item to your petron. Document delivery is useful

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41:07

So when the items available in your library, maybe in another format or is available in open access.

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41:16

After supplying the item, then you complete close the the request. Any questions?

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41:36

So this was for the borrowing workflows.

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41:49

Now let's have a brief overview of what happens at the lending library side. So let me share my browse to show this option. Let me log into the lending side.

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42:04

Just give me a minute here.

Timestamp

42:24

So I'm here, at the landing side.

Timestamp

42:32

So as a lender, you find you cannot supply queue either here on the quick links, so here you can supply queue and your landing priorities are here as well or you can find the under lending request.

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42:52

Yes.

Timestamp

42:53

You cannot supply queue, your regular supply queue, and here, still on the left you find your landing priority queues. You like I mentioned, you can have up to five. Most libraries have one or two lending priorities only.

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43:13

And you can easily find those requests here so I can open here so this is your separated priority libraries you can supply. They are listed under your regular kind of supply tool, but this is for you to easily work on those 1st.

Timestamp

43:31

So let's open a loan request here. You can see your time to respond. The ones that are expiring 1st will be on top, like if you have anything expiring three or two days, they will be on the top of the list.

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43:51

For you to give better attention to those requests. So when you open the request, you would have your OPAC integration. Let me show you on this slide, I don't have here in this.

Timestamp

44:08

Let me find here on this slide. So here you would see your this is the OPAC integration. So you'd see the the shelf location and the information for the local ID would go on the local ID field the the.

Timestamp

44:28

Call number and this information is printed in the full request or the bookstraps.

Timestamp

44:35

Anything that you print re related to this request. And if you have more than one item you would have a link here to select which copy you want to supply, ok?

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44:58

Going back there. So now after you have that information, you can add this, you see the here on the right printer, now you can add this to the bookstrap sticker, print queue. This is the best approach because you can do this for several requests.

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45:18

Instead of work individually, so you can add this to the to the bookstraps to your print queue, and then here you want to see Mark as considering is where you see the advanced lending workflows for you to select which one you want to.

Timestamp

45:38

Use, this is optional, you don't need to use any of them. You can mark, e.g. mark as retrieving. Now, your request would be here under retrieving, you see here on the left you have the retrieving. I can go and select another request.

Timestamp

45:58

Any other loan request and do the same process. I can add to the bookstraps, book stickers, and mark as retrieving. And now the two requests are under retrieving. I can manually move the status

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46:19

of this request, like e.g. from.

Timestamp

46:24

Retrieving to packaging, I can select both at the same time, so I can select that packaging, I can select both or I can print the.

Timestamp

46:40

Go print the bookstraps and scan that information here and move to packaging. They are NO longer here under retrieving they are under packaging. If you need to move anything back to.

Timestamp

46:57

Retrieving, so you can manually change that as well. And then when you print your, you have your print queue here, after you print your book straps.

Timestamp

47:15

Your bookstraps are here. You have that printed, you have all the information you would have your local ID information listed here. After you print that, you can use that to scan to manage the request and then here back to back.

Timestamp

47:35

packaging, when you're ready to answer yes to the request or before you ship that item, you can batch, answer yes to both requests. You can mark to print the shipping labels.

Timestamp

47:56

And select those you want. And when you mark yes, then all the requests move the status to shipped in transit and your print labels are here in the.

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48:17

Print queue, your shipping labels are here. You can select those. The paper size comes from your configurations. You can select anything you want to add, Select where you start printing those labels. You can change this.

Timestamp

48:39

Then print your shipping labels and ship those items to the borrowers. So this is the process for the physical item and as the borrower starts to.

Timestamp

48:57

Update the status of the request, then you would see that request moved from in transit to another option. And then after the item is returned, you would see that request here under returned for you to.

Timestamp

49:17

To complete.

Timestamp

49:18

Close that request and you can do this in batch as well, do several items at the same time. Any questions on the lending side? Again, I go further in detail in the lending.

Timestamp

49:38

Workflows session. This for you to have an idea.

Timestamp

49:42

How this works I have a final question for you. Let me open this.

Timestamp

50:10

Select the correct statement, which one is the correct one? Which statement do you think is the correct one? And again, is this to help to see if you understood all the concepts.

Timestamp

50:30

And it's a chance for me to explain you that statement as, as well.

Timestamp

50:49

Thanks for participating again Let's check the correct answer.

Timestamp

51:07

The correct answer is number two. Lending priorities is to view requests from designated borrowers in a special queue. Document delivery, again, is for the borrowing library to supply their own content to their patrons.

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51:27

OPAC integration is to find the availability and the location of the item in your shelf. and proven senders is to select your pre approved lenders to send the.

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51:47

Copy requests directly to your pedroms, ok?

Timestamp

51:51

If you still have questions, you can use the chat to send your questions. And thanks again for participating. Now let's briefly talk about reports when subscribing to.

Timestamp

52:11

Tipasa your library receives a nine digit authorization and password?

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52:17

If you don't have this information, contact OCLC support to retrieve your credentials at support@OCLC.org. You access your usage reports from the homepage in the middle section.

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Under other by clicking the respective link and entering your credentials. You find a variety of monthly reports available as borrower and lender such as.

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52:51

Reason for NO reports with information why the lander responded a note to the request, resource sharing stats reports with all the detail on the request including costs and dates and activity overview and transactional level detail.

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53:11

With the number of activities in a given period. And you can generate customized reports as well from the analytics tab. Let me briefly show you where you generate the reports I mentioned from the stats page and how you generate custom.

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Reports from the analytics tab, just, just let me share my browser again.

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So, from the homepage in the middle section for the regular reports in the middle section under order, OCLC usage statistics, this is the link you'll click.

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Then you enter your credentials, your name this authorization and password.

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Then you can access the reports. You can select the month you want that report and update. All the reports can be exported.

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Or emailed to yourself. You can enter several email addresses here and if you click this send monthly box, if you check this box and select the format and the style you want to receive the reports, then save it. Then the

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System will automatically send you these usage reports.

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Every month your library has activities ILL activities, so you you don't need to come here to generate those reports. But you need to do this to each of the reports you want to receive automatically.

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And this is for the regular reports, you can create custom reports as well from the analytics tab here on the homepage, the analytics tab for borrowing libraries.

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That enabled document delivery, you find those reports here analytics, reports, classic reports, inter library loan. So you have three types of of document delivery.

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Reports, you can select that, enter the date range, generate the reports, and you can export those reports. You can create other custom reports.

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As well from the analytics tab reports launch pad. This is when you want to generate more specific reports.

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56:29

You go to analytics reports launch pad

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56:33

Then because I have some previous saved, I land in this page, so I go to this home icon you see here on the upper left side, and from here you have some tabs for your recent documents, the reports you ran

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56:53

The query recently and saved and now I click for new ones applications.

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Web intelligence, then you land in this page here for you to select the universe.

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57:18

Okay, the universe is interlibrary loan, ok. And now here you have some options here this is to hide this panel.

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The filter to hide the filter, this other option here is when you want to combine queries, you can add an additional query and I can add additional query here.

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When you want to combine and ask to combine those queries and when you do that, then you can select the scope you want for that and.

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Also, hide the previous panel if you want to see just one. And this gear icon is for you to change the properties for your query. This is the default, but you can change that.

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If you want to create, like, e.g., I want to generate a report as a borrowing library for unfilled copies in 2025. So the 1st step is to select the result objects here. So on the left.

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Left side you have all the options to select. So here you'd start with the.

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Request details and select the request ID. I can double click and it goes there then request item.

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I want to the the author for the article. Another option besides of double clicking, you can click once and click the arrow here. It's added. I can add the title, I can drag.

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59:28

The same so three options, double click, one click and arrow or drag to the area. I can add another option here, ISSN, and.

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I think that's all, then I go to supplier, No lending library I want the lending library symbol.

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As well, and I can have the if I want the institution name as well, I can add that. As much information you want to add, then I can go to.

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Supplier status supplier his supplier history and I want the lander reason for NO, and then I want to add the query filters after I have all my objects added here. So my filters are.

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I want to use a supplier history, the unfilled date, and I want the, the option to be the year, so I drag this to the filter and then under this in list I can select the variable.

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So I want this to be equal to, and then you can type the information here or use this three dashes if you want something different. So 2025, after I have all the information I want for my query.

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Then you see this run button here on the bottom, I run my report, so it's running the report.

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And then I can save this report in this environment. If I want to reuse it later, I can export or print this report and these are options for continuing editing this report.

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So these are for custom reports and on the copy of the presentation, I put the link to the documentation for all types of reports and there's a short tutorial video for custom reports like I showed you.

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So you had an overview of how to password works. You have learned about the configuration options. You have seen the basic workflows for the borrowing library, and you have seen the basic workflows for the landing library.

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You have the support portal to contact OCLC support and access documentation on the topics discussed here, including configuration options. You will find the links to those pages on the learner guide for the session as well.

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1:03:02

And I added the links to the copy of the presentation too. The community center that you can access directly from the service or from this address on on the page for you to communicate with other libraries using Tipasa participate in discussion.

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Also start the discussion, know, learn about new things in the service or events taking place and you can add your ideas for the.

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Product enhancements, our product team pays attention to this area. Next steps, if you are interested in learning more about Tipasa, we are offering training sessions on Tipasa borrowing on 22 October, and Tipasa

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Lending workflows on 29 October. You can register to any of the two sessions or both.

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We are reaching the end of the session. If you don't have any additional questions, this concludes our training session. I'd like to thank you for participating. Please take a moment to answer a few questions for the session evaluation. Let me put the.

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It's just a brief survey. Let me put this link on the chat as well. We appreciate your feedback. Thanks again.

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And enjoy the rest of your day.