

29 January 2026

---

# Introduction to Tipasa<sup>®</sup>

**Lucia Shelton**

OCLC Member Education

# Tipasa led-instructor training series

- Introduction to Tipasa
- Tipasa Borrowing workflows
- Tipasa Lending workflows
- [Register](#)

Receive Community Center badge for attending training

Complete this form: [\*\*oc.lc/training-badge-request\*\*](https://oclc.org/training-badge-request)

# In this session you will learn...

How Tipasa works

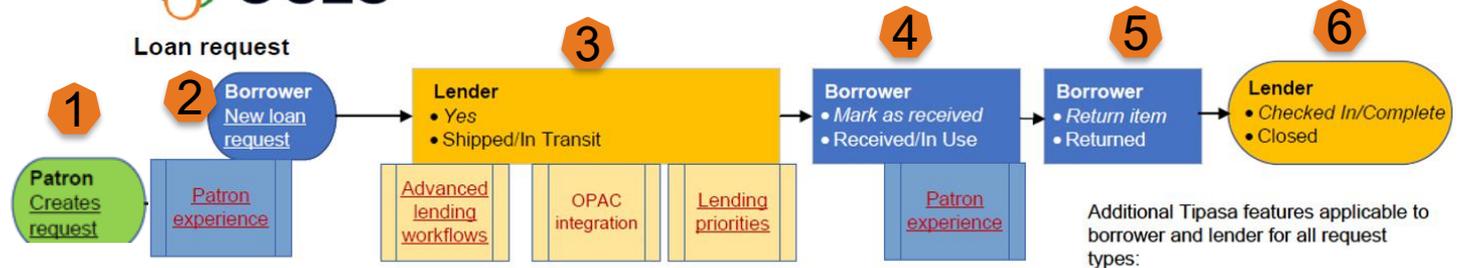
Preparations for Tipasa

Basics of Borrowing workflows

Basics of Lending workflows



# HOW TIPASA WORKS



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**

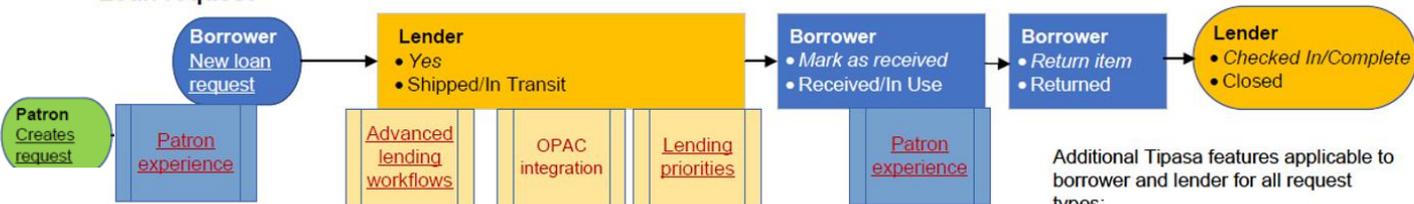
See  
Learner  
Guide

**Legend**

Tipasa features

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

## Loan request

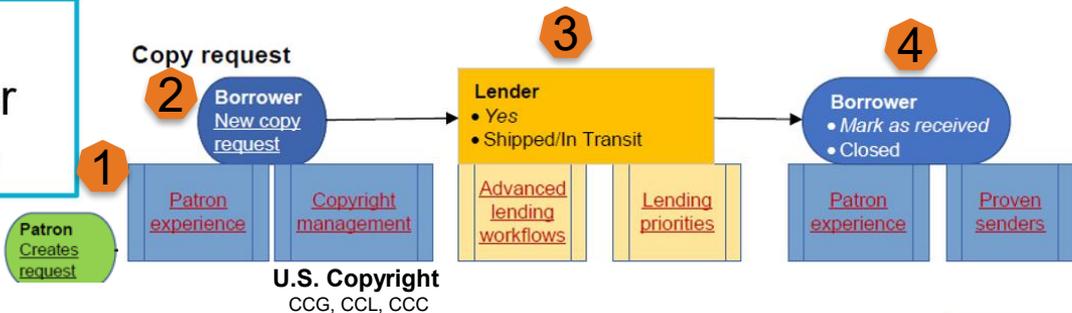


Additional Tipasa features applicable to borrower and lender for all request types:

- [Tags](#) and staff notes
- [Automations](#)
- [Export](#)
- Reports available through OCLC Usage Statistics, [WorldShare Reports](#), and [WorldShare Report Designer](#)

See Learner Guide

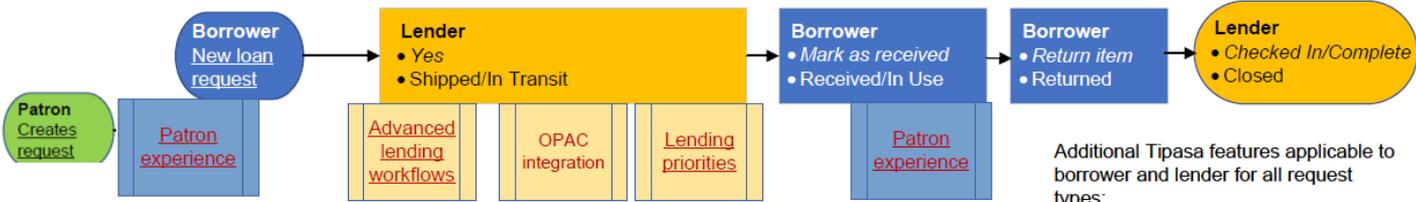
## Copy request



### Legend

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

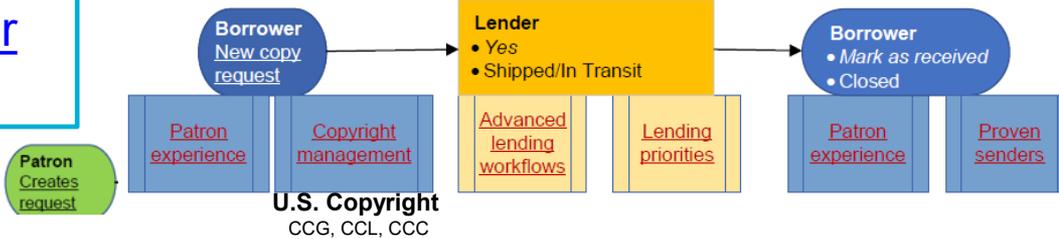
## Loan request



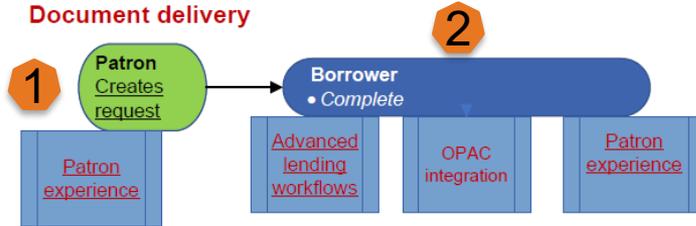
Additional Tipasa features applicable to borrower and lender for all request types:

- **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

[See Learner Guide](#)

# PREPARE FOR TIPASA

# Tipasa circulation integration

You might want to consider configuring circulation integration

- ILS automatically creates temporary record and places hold.
- ILS automatically checks in item and deletes temporary record.

[WMS Circulation integration](#) (WorldShare ILS)

[Third-party Circulation integration](#) (other supported ILS – via NCIP)

# Patron configurations – My Account

The screenshot shows the OCLC Demo Library interface. At the top left is the OCLC logo and 'Demo Library'. A search bar is in the top center. The top right says 'Hello Angela Anderson' and 'My Account' with a dropdown arrow. Below this is a navigation bar with 'Advanced Search' and 'Resources'. The main content area shows the user's name 'Angela Anderson' and a 'View Profile' link. Below that are tabs for 'REQUESTED', 'SAVED SEARCHES (0)', and 'PROFILE'. The 'REQUESTED' tab is active, showing a table with columns 'Title', 'Submitted Date', and 'Status'. Below the table are three buttons: 'CANCEL REQUESTS', 'CREATE REQUEST', and 'RENEW'. Three red callout boxes with arrows point to these buttons. The first callout points to 'CANCEL REQUESTS' and contains the text: 'Cancel requests (hidden if your library disables patron ability to cancel ILL requests)'. The second callout points to 'CREATE REQUEST' and contains the text: 'Create new request (from blank form)'. The third callout points to 'RENEW' and contains the text: 'Renew item'.

Cancel requests  
(hidden if your library  
disables patron ability to  
cancel ILL requests)

Create new  
request (from  
blank form)

Renew item

Angela Anderson  
[View Profile](#)

REQUESTED SAVED SEARCHES (0) PROFILE

Title Submitted Date Status

Select All [CANCEL REQUESTS](#) [CREATE REQUEST](#) [RENEW](#)

# Patron configurations

OCLC Need Help? OCLC Training

WorldShare ILL

Patron Settings [Help on this screen](#)

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Automated Request Manager

Article Exchange Settings

Purchase Options

Request Forms

Print Settings

Circulation Integration

Advanced Workflows

Patron Settings

Address Book

Notifications

**Patron Account Management**

**Route requests from newly registered patrons to New for Review so their account can be verified prior to processing the request.**

Require approval for new ILL patron accounts  On

**Patron Request Management**

**Enable patron actions for interlibrary loan requests in the user portal application.**

Display patron due date  On

Allow patrons to renew ILL requests online  On

Allow patrons to cancel ILL requests online  On

Number of days to offset patron's due date

Number of active requests allowed per patron   
*Note: No value indicates unlimited*

**Patron Data Retention**

**Select how long patron data is retained after a request is closed.**

Retain patron data for  Months

Save Cancel

# Patron configurations – Request form



Need Help? ▾ Tipasa Trainer ▾

WorldShare ILL

OCLC Training Library (127968)

Change

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Automated Request Manager

Article Exchange Settings

Purchase Options

Request Forms

Print Settings

## Request Forms

[Help on this screen](#)

Customize your institution's request form(s).

▶ Article Request Form

▶ Book Request Form

▶ Other Request Form

▶ WorldShare ILL Request Form

▶ Lender's Off-System Request Form

Click the 'Save' button to save the form. Click the 'Reset' button to use the Standard Form for this institution.



# Patron request form

## Request Forms

[Help on this screen](#)

Customize your institution's request form(s)

▼ Article Request Form

Display Name:

Article

In Use:

Enabled

### *Bibliographic Section*

Section Header:

About my it

Field:

Title/Journal Title

Input Type

textarea

Date

textentry

Where did you learn :

textarea

## Request Forms

[Help on this screen](#)

Customize your institution's request form(s).

▶ Article Request Form

▼ Book Request Form

Preview

Display Name:

Book

In Use:

Enabled

URL:

<https://127968.account.worldcat.org/profile/route/workform>

### *Bibliographic Section*

Section Header:

About my item



Remove a Section

Field:

Title/Journal Title

Input Type:

textarea

Field Label:

Title:

Field Values:

Options:

required  
 editable

# Patron notifications

WorldCat Registry

IP Addresses

EIDM Institution

WorldShare ILL

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Automated Request Manager

Article Exchange Settings

Purchase Options

Request Forms

Print Settings

Circulation Integration

Advanced Workflows

Patron Settings

Address Book

Notifications

External System Settings

WMS Acquisitions Integration

## Notifications

Required fields are marked with an asterisk \*

View, manage, and create automated email notifications specific to your institution.  
*Offset times are scheduled relative to GMT-5.*

### SMS Notifications

Send SMS for automated notifications.

Save Changes

- > Borrowing Library to Patron
- > Lending Library to Borrowing Library
- > Off-System Automated Messages
- > Document Delivery Library to Patron

### Custom

Create New Custom Notification

<b>Not found as cited - Article</b> <i>Use to notify patron more information is needed.</i>	PATRON <a href="#">Preview</a>	<a href="#">Edit</a>
<input checked="" type="checkbox"/> Manual sending in WorldShare	<a href="#">Send Test Email</a>	
<a href="#">Edit Settings</a> <a href="#">Delete</a>	<a href="#">Save</a> <a href="#">Cancel</a>	
<b>Cancelled: no lender found (copy)</b>	PATRON <a href="#">Preview</a>	<a href="#">Edit</a>
<input checked="" type="checkbox"/> Manual sending in WorldShare	<a href="#">Send Test Email</a>	
<a href="#">Edit Settings</a> <a href="#">Delete</a>	<a href="#">Save</a> <a href="#">Cancel</a>	
<b>Item held in our collection (faculty)</b>	PATRON <a href="#">Preview</a>	<a href="#">Edit</a>
<input checked="" type="checkbox"/> Manual sending in WorldShare	<a href="#">Send Test Email</a>	

[Send Test Email](#)

# Some configurations to consider

- OPAC integration
  - Item availability and shelf location
- Proven Senders
  - Trusted lenders to provide quality copies
- Priorities Lending queues
  - Your priority borrowers such as libraries in your group
- Advanced Lending workflows
  - Verifying, Retrieving, Scanning, Packaging

[See OCLC Service Configuration for Tipasa](#)

# Automation - Borrower

The screenshot shows the OCLC Automated Request Manager interface. On the left is a navigation menu with items like 'WorldShare ILL', 'Interlibrary Loan Options', 'Borrower Data', 'Lender Data', 'Custom Holdings Groups', 'Custom Holdings Paths', 'Automated Request Manager' (highlighted in blue), 'Article Exchange Settings', 'Purchase Options', 'Request Forms', 'Print Settings', 'Circulation Integration', 'Advanced Workflows', 'Patron Settings', and 'Address Book'. The main content area is titled 'Automated Request Manager' and has tabs for 'Borrowing' (selected) and 'Lending'. Below the tabs is a section for 'Borrowing New Request' which lists various standard actions and their configurations. A red arrow points to the 'Borrowing' tab. Two blue callout boxes are overlaid on the image: one pointing to the top right with the text 'See Automation documentation', and another pointing to the 'Automated Request Manager' menu item with the text 'See Automation self-paced training'. The top right of the page has 'Need Help?' and 'OCLC Training' dropdown menus. The bottom right has an 'Add New' button.

OCLC

Need Help? ▾ OCLC Training ▾

WorldShare ILL

OCLC Training-TPU (38998)

**See Automation documentation**

**Automated Request Manager** [Help on this screen](#)

Borrowing Lending

**See Automation self-paced training**

Borrowing New Request

These standard actions are done for all Borrowing New Requests, regardless of profile:

<b>Bibliographic record</b> Best matching bibliographic record applied to request	<b>US Copyright Management</b> Configurable under <a href="#">Advanced Workflows</a>
<b>WorldCat holdings check</b> Available when holdings set in WorldCat	<b>OPAC holdings check</b> Configurable under <a href="#">Advanced Workflows</a>
<b>Knowledge base holdings check</b> Available when OCLC knowledge base holdings set in WorldCat	<b>Patron approval check</b> Configurable under <a href="#">Patron Settings</a>
<b>Custom Holdings Group check</b> Available when Custom Holdings Group holdings set in WorldCat	<b>RapidILL holdings check</b> Configurable under <a href="#">External System Settings</a>
<b>Main Automations</b> Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.	<b>Notifications</b> Configurable under <a href="#">Notifications</a>

+ Add New

OCLC

# Automation - Lender

OCLC

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

**Automated Request Manager**

Article Exchange Settings

Purchase Options

Request Forms

Print Settings

Circulation Integration

Advanced Workflows

Patron Settings

Address Book

Notifications

External System Settings

## Automated Request Manager

[Help on this screen](#)

Borrowing **Lending**

### Lending New Request

These standard actions are done for all Lending New Requests:

- Deflections**  
Defects requests based on [Policies Directory](#) settings
- Supplier status check**  
Checks if current supplier status is set to yes
- Knowledge base holdings check**  
Checks for WorldCat knowledge base holdings and adds a link to requested content
- Group affiliations check**  
Identifies groups of which both borrower and lender are members
- Time to Respond**  
Visible in Can You Supply? queues; displays how long a lending request will stay with your library before aging or expiration
- Real time availability check**  
Allows system to respond no to requests for unavailable items; [request configuration](#)
- OPAC holdings check**  
Attaches local call number, shelving location and availability status to request; requires configuration by OCLC
- Lending Priorities Assignment**  
Displays requests from configured groups of libraries in separate queues; configurable under [Advanced Workflows](#)

**Main Automations**  
Configure automations that will be applied to new lending requests. Only the best matching automation will be applied to a request.

[+ Add New](#)

# **BASICS OF BORROWING WORKFLOWS**

# Life cycle for a loan request

Patron completes request form for a book

Create request: **Book** Journal article Videos

\* Required field

About my item

Title: \*  
John Adams 10/500

Publisher:  
Cosimo Classics, 16/100

Date:  
©2005. 6/100

Title of chapter:  
0/500

How did you find this item?  
0/100

Author:  
Charles Francis Adams

Place of Publication:  
New York : 0/100

ISBN:  
1596051019

OCLC#:  
65521380

About my request

Service Type: \*  
Book/media - Loan

Amount Willing to Pay:  
0/100

Pickup Location:  
Main Library

My address and contact information

First Name: \*  
Jordan 6/100

Patron ID: \*  
78459237 8/100

Needed before (yyyyymmdd):  
mm/dd/yyyy

Comments:  
0/450

Edition:  
 Any  Recent  This

Last Name: \*  
James 5/100

E-mail Address: \*  
jamesj@notreal.edu 18/100

# Life cycle for a loan request

WorldShare®

Need Help? ▼ OCLC Training ▼  
User support info

Interlibrary Loan | Analytics | Admin

Tipasa® Home

- Discover Items
- Find Patrons
- Borrowing Requests**
  - AE Alert (2)
  - Copyright (4)
  - New For Review (7)**
  - Not Reviewed (7)
- Produced (5)
  - In Transit (5)
  - Received? (5)
- Returned
  - Create Request
- Document Delivery
- Lending Requests
- Purchasing Requests
- Off-System Requests

### Tipasa® home

Quick search

Search for requests

Active requests  Closed requests

Request ID

Active request tags

Search active request tags

No matching tags found.

Quick links

Borrowing

- [AE Alert \(2\)](#)
- [Copyright \(4\)](#)
- [New for review \(7\)](#)**
- [Not reviewed \(7\)](#)

Borrower: New  
for Review

# Life cycle for a loan request

WorldShare

English Help OCLC Training

Intertibrary Loan Analytics Admin

Tipasa@ Home

- Discover Items
- Find Patrons
- Borrowing Requests**
  - AE Alert (4)
  - Copyright (8)
  - New For Review (16)**
  - Not Reviewed (14)
  - Reviewed (2)
- Produced (24)
  - Awaiting Response (1)
  - In Transit (11)
  - Unfilled (7)
  - Received? (11)
  - Expired (5)
- Returned (3)
  - Returned (3)
- Create Request
- Document Delivery
- Lending Requests
- Purchasing Requests

TPU Reg

### Borrowing requests: Not Reviewed (15)

Export all

Refresh

Rows per page: 10 1-10 of 15 1 2 >

ID	Status	Media type	Title	Patron	Date requested	Need before	Request tags
<a href="#">233876184</a>	Not Reviewed		<a href="#">John Adams /</a>	<a href="#">James, Jordan</a>			
<a href="#">230414359</a>	Not Reviewed		<a href="#">Examining Fuel Economy and Carbon Standards for Light Vehicles /</a>	nancy jones			
<a href="#">230392462</a>	Not Reviewed		<a href="#">Gendered transactions : the white woman in colonial India, c.1820-1930 /</a>	<a href="#">Jones, Nancy</a>			
<a href="#">230380510</a>	Not Reviewed		<a href="#">Critical security in the Asia-Pacific /</a>	<a href="#">Green, Joseph</a>			
<a href="#">230335680</a>	Not Reviewed		<a href="#">Economy, trucking poised for recovery amid vaccine rollout, consumer spending</a>	<a href="#">Newberry, Nita</a>			
<a href="#">230335260</a>	Not Reviewed		<a href="#">Les bioplastiques dans les emballages rigides : le matériau, sa mise en forme et sa modélisation /</a>	<a href="#">Jones, Nancy</a>			
<a href="#">230334639</a>	Not Reviewed		<a href="#">ECONOMY AND SOCIETY AT THE CLOSE OF THE AMERICAN CENTURY /</a>	<a href="#">Jones, Nancy</a>			
<a href="#">230281468</a>	Not Reviewed		<a href="#">The American journal of economics and sociology,</a>	<a href="#">Larsen, Lurlene</a>			
<a href="#">230281404</a>	Not Reviewed		<a href="#">English journal,</a>	<a href="#">Keller, Kristin</a>			
<a href="#">230281382</a>	Not Reviewed		<a href="#">English journal,</a>	<a href="#">Keller, Kristin</a>			

Borrower: New for Review



# Life cycle for a loan request

233876184: John Adams /

Send request

Change fulfillment type

Cancel request

Save

Mark as reviewed

Send email

Constant data

None applied

Request details

Request details (Request ID 233876184)

Patron summary

Source PATRON  
Status Not Reviewed

Title/Journal

John Adams /

Uniform title

Life of John Adams

Author

Charles Francis Adams; John Quincy Adams

Publisher

New York : Cosimo Classics, 2005

ISBN

9781596051010

ISSN

OCLC

65521380

View holdings

DOI

Library search

My library catalog

Local ID

External search

Google

[Google Scholar](#)

[Google Books](#)

[Google.com](#)

Borrower:

- Search WorldCat if necessary
- Build lender string
- Apply constant data if appropriate

# Life cycle for a loan request

233876184: John Adams /

**Send request** ▾ Change fulfillment type ▾  Cancel request

✓ Save  Mark as reviewed  Send email  More actions

Constant data  
None applied ▾

### Request details

Request details (Request ID 233876184)

Patron summary ⓘ

Source PATRON  
Status Not Reviewed

Title/Journal  
John Adams /

Uniform title  
Life of John Adams

Author  
Charles Francis Adams; John Quincy Adams

Publisher  
New York : Cosimo Classics, 2005

ISBN  
9781596051010

ISSN

OCLC  
65521380

[View holdings](#)

Library search  
[My library catalog](#)

Local ID

External search

Google  
[Google Scholar](#)  
[Google Books](#)  
[Google.com](#)

Borrower:

- Make any necessary edits
- **Send Request**

# Life cycle for a loan request

The screenshot displays a web interface for managing a loan request. At the top, there are navigation links for 'Previous request' and 'Next request'. The request ID '233876184' and the borrower's name 'John Adams' are shown. Two buttons, 'Mark as received' and 'Mark as not received', are visible. A red arrow points to the 'Mark as received' button. Below these are tabs for 'Request', 'Staff notes' (with a count of 0), and 'Request history'. The 'Request details' section is expanded, showing a list of fields on the left: Patron summary, Source, Status, Lenders, Title, Uniform title, Author, Publisher, ISBN, OCLC, and Request tags. The main content area shows the request ID and a 'Mark as received' modal dialog. The modal has a title bar with a close button, a 'Date received' field with a calendar icon, a checkbox for 'Add to book straps/stickers print queue', and 'Cancel' and 'Mark as received' buttons. Red arrows point to the checkbox and the 'Mark as received' button in the modal. The background shows the 'Patron summary' section with fields for ISBN (9781596051010) and OCLC (65521380), and a 'Request tags' input field.

Borrower: Book arrives in mail.

- Scan request barcode
- Print Book Straps/Stickers if needed
- Mark as Received

# Life cycle for a copy request

Create Request: BOOK **JOURNAL ARTICLE** VIDEOS

\* Required field

About my item

Journal Title: \*  
  
25/500

Date: \*

Where did you learn about this item?  
  
0/500

Volume:

Issue/Number:

Page Numbers: \*

Title of article: \*  
  
63/500

Author of article:  
  
15/500

ISSN:

OCLC#:

Digital Object Identifier:

PMID:

About my request

Service Type: \*

Needed before (yyyyymmdd):

Patron completes request form for a journal article

# Copy requests can be “automatic”

- If request matches an applicable automation...
- And a Proven Sender fills the request using Article Exchange...
- Then patron is notified and can access article in My Account
- Without intervention by borrowing library staff

# Copyright not matched- US Libraries

The screenshot shows the WorldShare Interlibrary Loan interface. The top navigation bar includes 'WorldShare', 'English', 'Help', and 'OCLC Training'. The main navigation tabs are 'Interlibrary Loan', 'Analytics', and 'Admin'. A left sidebar contains various menu items, with 'Borrowing Requests' and 'Copyright (8)' highlighted with red boxes. The main content area displays 'Borrowing requests: Copyright (8)' and 'Total pledged copyright fees: \$11.30'. Below this, there are buttons for 'Bulk respond' and 'Export all', and a 'Refresh' button. A table lists borrowing requests with columns for 'Total uses', 'ID', 'Media type', 'Title', 'Patron', 'Date requested', 'Need before', and 'Request tags'. A light blue callout box with a blue border and text is overlaid on the right side of the table.

**Borrowing requests: Copyright (8)**  
Total pledged copyright fees: \$11.30

[Bulk respond](#) [Export all](#)

[Refresh](#) Rows per page: 10 1-8 of 8 < 1 >

Total uses	ID	Media type	Title	Patron	Date requested	Need before	Request tags
0	<a href="#">231494495</a>		<a href="#">ReOrient : global economy in the Asian Age</a>	Newberry, Nita			
0	<a href="#">231422808</a>		<a href="#">Engines for empire : the Victorian army and its use of railways</a>	Newberry, Nita			
0	<a href="#">230392462</a>		<a href="#">Gendered transactions : the white woman in colonial India, c.1820-1930 /</a>	Jones, Nancy			
0	<a href="#">230380510</a>		<a href="#">Critical security in the Asia-Pacific /</a>	Green, Joseph			
0	<a href="#">230335680</a>		<a href="#">Economy, trucking, poised for recovery amid vaccine rollout, consumer spending</a>	Newberry, Nita			
1 of 8 pending	<a href="#">230281404</a>		<a href="#">English journal,</a>	Keller, Kristin			
0 of 0 pending	<a href="#">230256350</a>		<a href="#">Journal for eighteenth-century studies,</a>	Ellis, Emily			
0 of 0 pending	<a href="#">230192131</a>		<a href="#">On some fallacies of political economy</a>	--	03/19/2025	05/02/2025	

Rows per page: 10 1-8 of 8 < 1 >

**See [Copyright management self-paced and interactive guided tour](#)**

# Copyright not matched- US Libraries

WorldShare English Help OCLC Training

Interlibrary Loan Analytics Admin

Tipasa® Home

- Discover Items
- Find Patrons
- Borrowing Requests
- Document Delivery
- Lending Requests
- Purchasing Requests
- Off-System Requests
- Print Queue (5)
- Manage Copyright**
  - Copyright Titles
  - Copyright Fees Payable
  - Payment Batches

TPU Reg ID: 38998

**Manage Copyright: Payment Batches**

Results 1 - 6 of 6 Rows 10

Batch Name	Created Date	Number Paid	Fees	Action
Payments-2025-03-06	03/06/2025	2	\$7.45	
Payments-2023-12-18	12/18/2023	6	\$113.45	
Payments-2020-01-03	01/03/2020	8	\$114.45	
Payments-2017-05-17	05/17/2017	2	\$76.00	
Payments-2017-02-24				
Payments-2017-02-20				

TPU Reg ID: 38998

**Manage Copyright: Copyright Titles**

Request Date: 2025 Show: All Export Rows 10

Results 1 - 6 of 6

Copyright Title	ISSN	OCLC Number	Fair Use	Will Pay	Other	Total	Fees	Action
Anthropology of consciousness	1556-3537	60583664	1	0	0	1	\$0.00	<a href="#">View</a>
English journal	0013-8274; 2161-8895; 0136-8274	1325896; 3536493; 38966572	5	3	0	8	\$11.30	<a href="#">View</a>
Examining Fuel Economy and Carbon Standards for Light Vehicles	2070-8270	762085003	1	0	0	1	\$0.00	<a href="#">View</a>
Fisheries management and ecology	0969-997X	30443288	2	0	0	2	\$0.00	<a href="#">View</a>
IEEE transactions on signal processing : a publication of the IEEE Signal Processing Society	1053-587X; 1941-0476	22582582	1	0	0	1	\$0.00	<a href="#">View</a>
The American journal of economics and sociology	0002-9246; 1536-7150	1480136	3	0	0	3	\$0.00	<a href="#">View</a>

Results 1 - 6 of 6 Rows 10

# Life cycle for a Document Delivery request

Create request: Article **Book** Other

\* Required field

About my item

Title: \*  33/500

Author: \*  13/500

Publisher:  27/100

Place of Publication:  0/100

Date:  4/100

ISBN:  13/100

Where did you learn about this item? \*  0/500

Title of chapter:  0/500

About my request

Service Type: \*  ▼

Needed before: \*  📅

Patron completes request form (in this example, for a book)

# Life cycle for a Document Delivery request

The screenshot shows the WorldShare Tipasa interface. The left sidebar contains a navigation menu with the following items: Tipasa® Home, Discover Items, Find Patrons, Borrowing Requests, Document Delivery (highlighted with a red box), New (6), New - Copies (5), New - Loans (1), In Process (11), Verifying (2), Retrieving (6), Scanning (3), Create Request, Lending Requests, Purchasing Requests, Off-System Requests, Print Queue (1), and Manage Copyright. The main content area is titled 'Tipasa® home' and includes a 'Quick search' section with radio buttons for 'Active requests' (selected) and 'Closed requests', and a 'Request ID' dropdown. Below this is an 'Active request tags' section with a 'Refresh' button and a search input field. The 'Quick links' section at the bottom is organized into three columns: 'Borrowing' (with links for Copyright (2), New for review (3), Not reviewed (1), and Reviewed (2)), 'Document delivery' (highlighted with a red box, with links for New (6), New - Copies (5), New - Loans (1), In process (11), Verifying (2), Retrieving (6), and Scanning (3)), and 'Purchasing' (with links for Purchasing (1) and Received? (1)).

Borrower: If request matches appropriate automation, it goes to Document Delivery queue

# Life cycle for a Document Delivery request

229452369: Beowulf : a new verse translation /

Mark as Complete Change Fulfillment Type Cancel Request

Request Purchase Staff Notes 0 Request History

Fulfillment Type Document Delivery

Title / Journal Beowulf : a new verse translation /

Uniform Title

Author Seamus Heaney; Straus and Giroux Farrar

Publisher New York : Farrar, Straus and Giroux

ISBN 9780374111199

Request History

Actions:

Mark as Verifying Note

- Mark as Verifying
- Mark as Retrieving
- Mark as Scanning
- Mark as Packaging

Borrower: (optional): Use Advanced Lending queues

Request History

Automation History

Date	Note
02/04/2019 3:47:59	1. Request matched profile SENDLOANS.
	2. Held by your library, so producing as Document Delivery

# Life cycle for a Document Delivery request

229452369: Beowulf : a new verse translation /

Request [229452369](#): Status updated to Delivering (Packaging)

**Mark as Complete** Change Fulfillment Type ▼ Cancel Request

Actions: Mark as New ▼ Note

Request Purchase Staff Notes (0) Request History

Verification User:professor

Patron (Benson, Barbara) **Approved**

View Patron

Name Benson, Barbara

ID bensonb

Status Grad Student

Department English

Address 6565 Kilgour Place

City Dublin

State/Province Ohio

Country United States

Postal Code 43017

Phone Ex: 777-555-1010

Email bensonb@notreal.edu

Fax Ex: 777-555-1010

Pickup Location Name Ship to me (Distance ed students only) ✕ ▼

Pickup Location Code Ship to me (Distance ed students only)

Notes NB: 2025-03-21T07:00:00Z[UTC]

Borrower: Mark as Complete

# Reopen a cancelled request

- If you cancel a request, you can search it from the Tipasa homepage, under closed status.

## Tipasa® home

Quick search

Search for requests

Active requests  Closed requests

Request ID

# Reopen a cancelled request

- If you want to reuse the request, on the upper right side use New request option

TPU Reg ID: 38998 [Close page](#)

234727117: Foundational economy : the infrastructure of everyday life

✓ Save [Send email](#) [More actions](#)

[Request](#) [Staff notes](#) [Request history](#)

Request details

Request details (Request ID 234727117)

Patron summary	
Source	WSILL
Status	Closed (Cancelled)
Lenders	*TPV
Title	Foundational economy : the infrastructure of everyday life
Author	Foundational Economy Collective
Publisher	Manchester : Manchester University Press, 2018.
ISBN	9781526134004 1526134004 9781526133991 1526133997
OCLC	1028623326

Library search

[My library catalog](#)

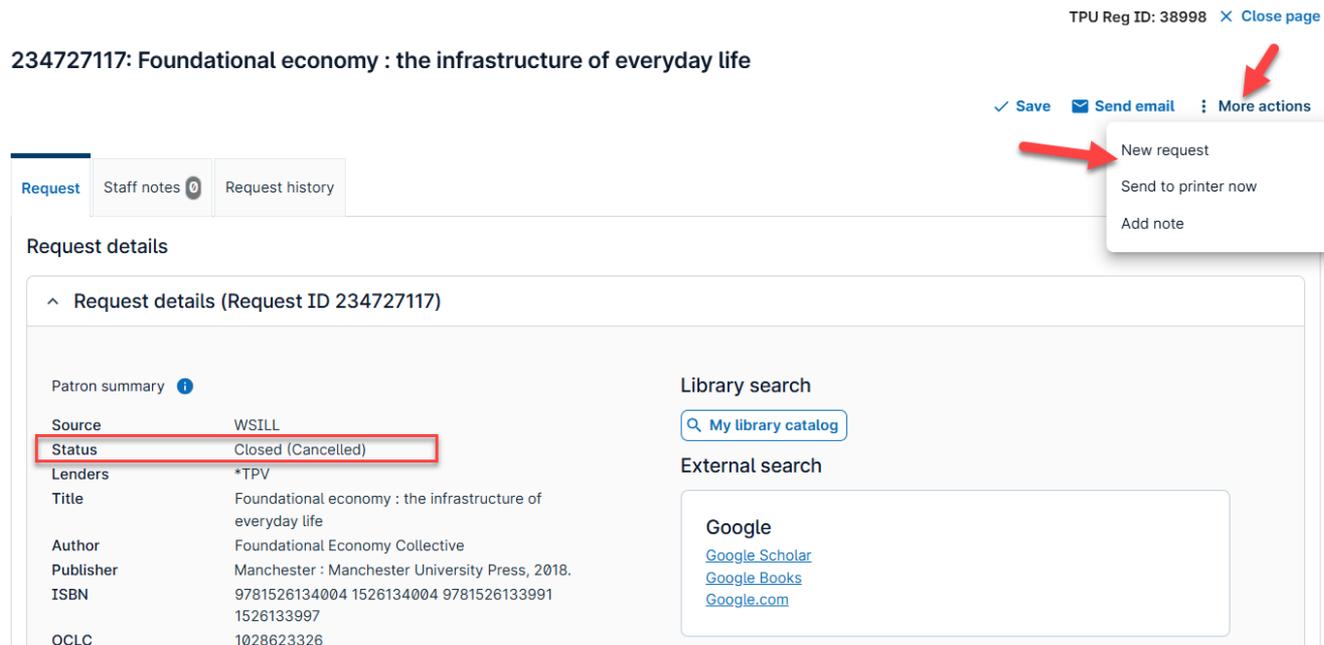
External search

Google

[Google Scholar](#)

[Google Books](#)

[Google.com](#)



# BASICS OF LENDING WORKFLOWS

# Life cycle for a loan request

Tipasa® Home

- Discover Items
- Find Patrons
- Borrowing Requests
- Document Delivery
- Lending Requests**
  - Can You Supply? (2)
  - New - Copies (1)
  - New - Loans (1)
- Purchasing Requests
- Off-System Requests
- Print Queue (1)
- Manage Copyright

Tipasa® home

Quick search

Search for requests

Active requests  Closed requests

Active request tags [Refresh](#)

Search active request tags  [Manage all tags](#)

No matching tags found.

Quick links [Refresh](#)

Borrowing	Document delivery	Lending
<a href="#">Copyright (2)</a>	<a href="#">New (5)</a>	<a href="#">Lending priorities</a>
<a href="#">New for review (3)</a>	<a href="#">New - Copies (5)</a>	<a href="#">Capital City (2)</a>
<a href="#">Not reviewed (1)</a>	<a href="#">In process (11)</a>	<a href="#">Can you supply? (2)</a>
<a href="#">Reviewed (2)</a>	<a href="#">Verifying (2)</a>	<a href="#">New - Copies (1)</a>
	<a href="#">Retrieving (6)</a>	<a href="#">New - Loans (1)</a>
	<a href="#">Scanning (3)</a>	

**Lending Priorities:**

- Capital City (2)**
  - Can You Supply? (2)
  - New - Copies (1)
  - New - Loans (1)

Lender: Can You Supply? Lending Priorities

# Workflow for a loan request (with OPAC integration)

229452497: Human competence : engineering worthy performance

Group affiliations: ULDM, NEUL, VA\$L, SL#N, NE@R, S#RE, ILLD, TEST

Choose response  Save Add note Send email Print options

Constant data  
None applied

Request Staff notes

Request details

Request details (33)

Type Loan  
Source WSILL  
OCLC 103769424

Max Cost USD 0.00  
Need Before 03/07/21  
Requested on 02/05/21

code  
Date 02/05/21

library's online catalog

Main Branch, MAIN-Stacks, LB1062.6 .G54 2007

Access  
ound  
holdings

Main Branch  
Location MAIN-Stacks  
Number LB1062.6 .G54 2007  
Source OPAC  
Availability Status Available (Checked less than 1 hour ago)

Symbol TS259

Summary Local holdings available.  
Format Unknown [zu]  
Location MAIN MAIN-Stacks

1 2 3 4

## Lender:

1. Automatic catalog lookup shows availability (for a single holding)
2. And populates Local ID with location & call number
3. Add to Book Strap/Sticker Print Queue
4. (Optional) Mark as Retrieving

# Workflow for a loan request

Tipasa® home TS259 Reg ID: 127968

Quick search

Search for requests

Active requests  
 Closed requests

Request ID

229452497 **2** **2** man competence : engineering worthy performance

Constant data

**Can you supply?**

Choose response

Add to print queues  
 Shipping labels  
 Book straps/Stickers

**4**

Request Details (Request ID 229452497)

Status	Considering (Packaging)
Type	Loan
Source	WSILL
LC	103769424
Orders	TS259, *TPV
Request Tags	<input type="text" value="Choose..."/>

Need Before USD 0.00  
Requested on 03/07/2025  
Due Date 02/05/2025  
Shipped Date 03/05/2025  
02/05/2025

Human competence : engineering worthy performance [Search my library's online catalog](#)

Lender:

1. Scan request barcode
2. Choose response
3. Print shipping labels and book straps (if not previously printed)
4. Respond Yes
5. Ship item

# Life cycle for a copy request

Tipasa® Home

- Discover Items
- Find Patrons
- Borrowing Requests
- Document Delivery
- Lending Requests**
  - Can You Supply? (2)
  - New - Copies (1)
  - New - Loans (1)
- Purchasing Requests
- Off-System Requests
- Print Queue (1)
- Manage Copyright

Lending Priorities:

- Capital City (2)**
  - Can You Supply? (2)
  - New - Copies (1)
  - New - Loans (1)

Tipasa® home

Quick search

Search for requests

Active requests  Closed requests

Active request tags [Refresh](#)

Search active request tags  [Manage all tags](#)

No matching tags found.

Quick links [Refresh](#)

Borrowing	Document delivery	Lending
<a href="#">Copyright (2)</a> <a href="#">New for review (3)</a> <a href="#">Not reviewed (1)</a> <a href="#">Reviewed (2)</a>	<a href="#">New (5)</a> <a href="#">New - Copies (5)</a> <a href="#">In process (11)</a> <a href="#">Verifying (2)</a> <a href="#">Retrieving (6)</a> <a href="#">Scanning (3)</a>	<a href="#">Lending priorities</a> <a href="#">Capital City (2)</a> <a href="#">Can you supply? (2)</a> <a href="#">New - Copies (1)</a> <a href="#">New - Loans (1)</a>

Lender: Can You Supply?  
Lending  
Priorities

# Life cycle for a copy request

TPV Reg ID: 85742 [Close page](#)

231422808: Engines for empire : the Victorian army and its use of railways

Group affiliations: ULDM, NEUL, VASL, SL#N, NE@R, S#RE, ILLD, TEST

Choose response ▼

Mark as ▼

[Save](#)

[Add note](#)

[Send email](#)

[Print options](#)

Yes, can supply

No, cannot supply

Conditional

Request history

## Request details

### Request details (Request ID 231422808)

Status Submitted

Type  
 Loan  Copy  No selection

Source WSILL  
OCLC 1141861286  
Lenders \*TPV

Borrower TPU  
Max cost USD 0.00  
Need before 12/26/2025  
Requested on 06/10/2025  
Referral date 11/25/2025

Shipped date  
11/25/2025 

### Electronic delivery

URL type

Article exchange

File/URL <https://worldcat.org/ILL/AF/VVzLgJuo8>   

Choose file

Undo

Password hrdGdquD 

Lender supplies the file using Article Exchange. System generates URL and password; Lender clicks **Yes**

# USAGE REPORTS

9-digit authorization and password

[support@oclc.org](mailto:support@oclc.org)

# Usage reports

WorldShare® Need Help? OCLC Training   
*User support info*

Interlibrary Loan | Analytics | Admin

Tipasa® Home

- Discover Items
- Find Patrons
- Borrowing Requests
- Document Delivery
- Lending Requests
- Purchasing Requests
- Off-System Requests
- Print Queue (6)
- Manage Copyright

### Tipasa® home

Quick search

Search for requests

Active requests  Closed requests

Request ID

Active request tags Refresh

Search active request tags

Manage all tags

invoice (2) billing (1)

### Quick links Refresh

Borrowing	Other
<a href="#">AE Alert (11)</a>	<a href="#">OCLC Policies Directory</a>
<a href="#">Copyright (9)</a>	<a href="#">OCLC Service Configuration</a>
<a href="#">New for review (34)</a>	<a href="#">OCLC Usage Statistics</a>
<a href="#">Not reviewed (33)</a>	<a href="#">OCLC Article Exchange</a>
<a href="#">Reviewed (1)</a>	<a href="#">Resource Sharing News</a>
<a href="#">Produced (30)</a>	<a href="#">WS ILL Training Resources</a>
<a href="#">In transit (17)</a>	<a href="#">OCLC Community Center</a>
<a href="#">Received? (17)</a>	
<a href="#">Expired (8)</a>	
<a href="#">Unfilled (3)</a>	
<b>Received</b>	
<a href="#">Overdue (3)</a>	
<b>Returned</b>	
<a href="#">Returned but missing (1)</a>	

# Usage reports

[FirstSearch](#)

[WorldCat Discovery](#)

[WorldCat.org](#)

[OCLC WorldShare Interlibrary Loan](#)

**COUNTER**

[Digital Collections](#)

[Link Resolver](#)

[WebDewey](#)

[Assessment Tools](#)

[About WorldShare Interlibrary Loan](#)

[Comments](#)

[Help](#)

Period:  Months:

▼ Institution: TPU

- ↓ [WorldShare ILL Purchase Request](#)
- ↓ [Resource Sharing Borrower Reasons For No Report](#)
- ↓ [Resource Sharing Lender Reasons For No Report](#)
- ↓ [Borrower Resource Sharing Stats Report](#)
- ↓ [Lender Resource Sharing Stats Report](#)
- ↓ [Strategic Union List Report](#)
- ↓ [Borrower Activity Overview Report](#)
- ↓ [Borrower Transaction-Level Detail Report](#)
- ↓ [eSerials Requests by Journal Title Report](#)
- ↓ [Serials Request Overview Report](#)

▶ Group: VA\$L (VA\$L)

[Watch a tutorial video for custom Tipasa reports](#)

[See Tipasa reports documentation](#)

# The **four** topics...

1. How Tipasa works
2. Preparations for Tipasa
- 2 . Basics of borrowing workflows
- 3 . Basics of lending workflows

# Questions?

Contact OCLC Support in your region

[https://help.oclc.org/Resource\\_Sharing/Tipasa](https://help.oclc.org/Resource_Sharing/Tipasa)

 OCLC | Support

[Release notes](#) [System status dashboard](#)

[Contact us](#)



Select a category



Discovery and Reference



Library Management



Metadata Services



Resource Sharing



Librarians' Toolbox



# Tipasa Community Center

## Tipasa

All community ▾

Search all content

Welcome to the Tipasa community

OCLC Community Center > Product > Tipasa

[Manage subscriptions](#)



Discussions  
522 POSTS



News  
711 POSTS



Events  
4 POSTS



Recordings  
18 POSTS



Ideas  
464 POSTS



Roadmap  
1 POST

### Activity in Tipasa

Sort: Most recent ▾

Start a conversation

Community manager

2 0 0

#### Upcoming Resource Sharing Product Insights & 'Ask an iLLer' recording

Join us for the next Resource Sharing Product Insights on Wednesday, October 22, at 2:00 pm, EDT to meet with members of the Resource Sharing team where we will review recent enhancements, discuss upcoming changes, and collect feedback from the commu...

Communities: Tipasa

#### Tipasa System Status

CURRENT EARLIER TODAY PLANNED

- 22 minutes ago
- No events
- System degradation
- Planned maintenance
- Planned maintenance and System degradation

Events

# Next steps

- **Tipasa Borrowing workflows**  
February 5, 2026
- **Tipasa Lending workflows**  
February 12, 2026

[Register](#)

# Thank You!

When you exit from Webex, you will automatically be directed to an evaluation form:

<https://www.surveymonkey.com/r/IntroTipasa>

- **Instructor:** Lucia Shelton
- **Class name:** Introduction to Tipasa
- **Date:** 29 January 2026

Training questions? Contact [training@oclc.org](mailto:training@oclc.org)