29 January 2026

Introduction to Tipasa®

Lucia Shelton
OCLC Member Education

OCLC

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**

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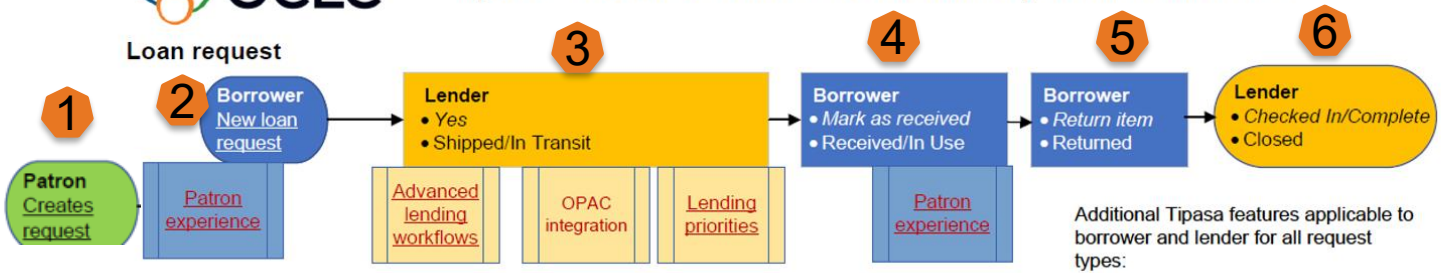
In this session you will learn…

- How Tipasa works
- Preparations for Tipasa
- Basics of Borrowing workflows
- Basics of Lending workflows

Documentation and OCLC Support

HOW TIPASA WORKS

Tipasa® features related to interlibrary loan workflows



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

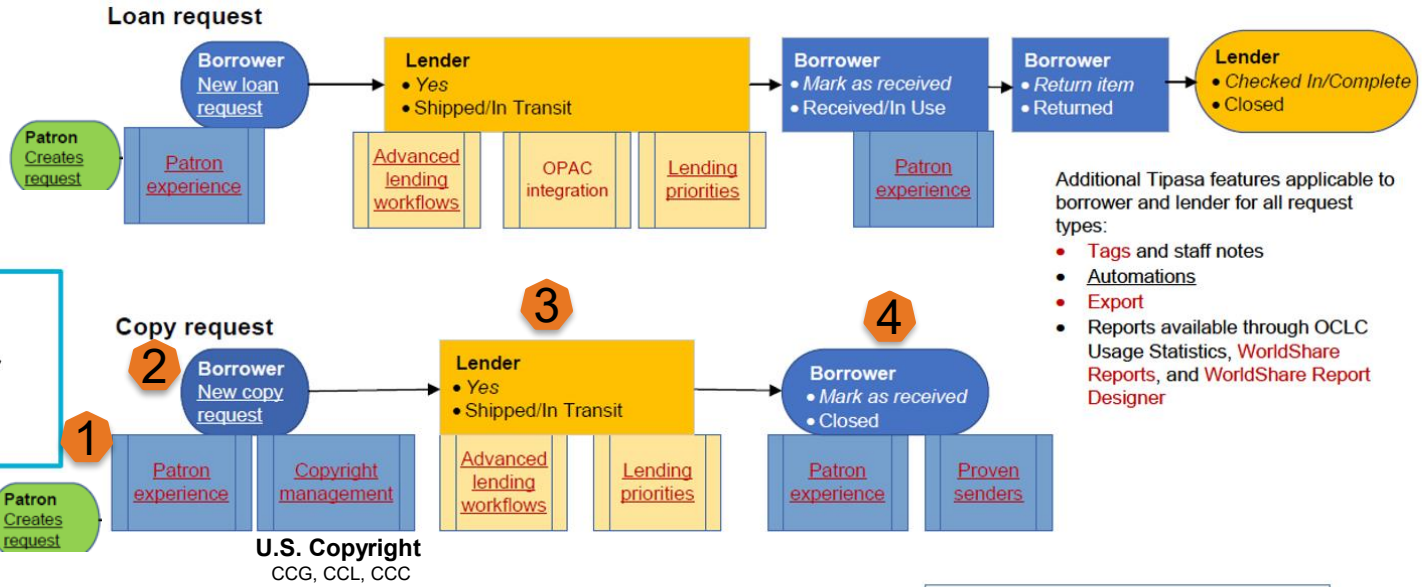
- Tags and staff notes
- Automations
- Export
- Reports available through OCLC Usage Statistics, WorldShare Reports, and WorldShare Report Designer

See Learner Guide

Legend

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

Tipasa® features related to interlibrary loan workflows



See Learner Guide

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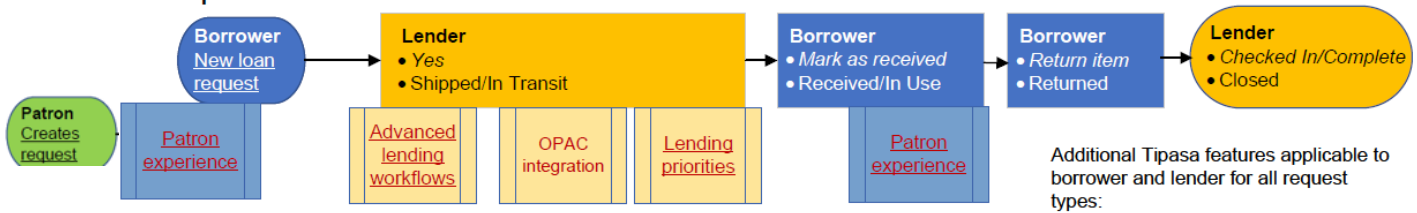
Tipasa® features related to interlibrary loan workflows

Loan request



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

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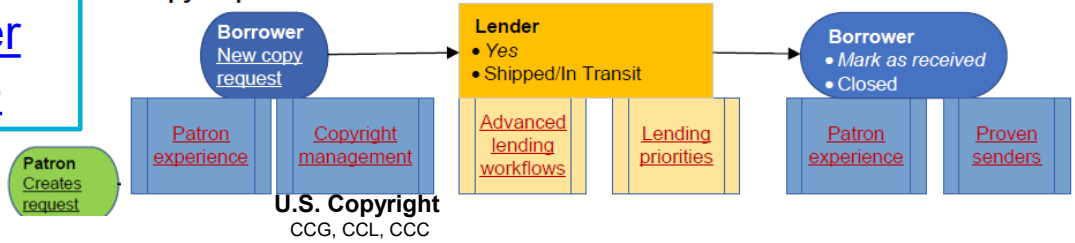
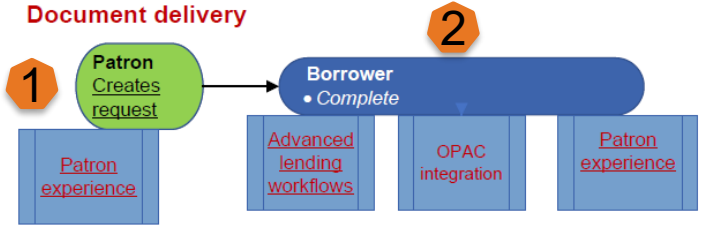
[See Learner Guide]

Copy request



U.S. Copyright
CCG, CCL, CCC

Document delivery



Legend

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

PREPARE FOR TIPASA

Tipasa circulation integration

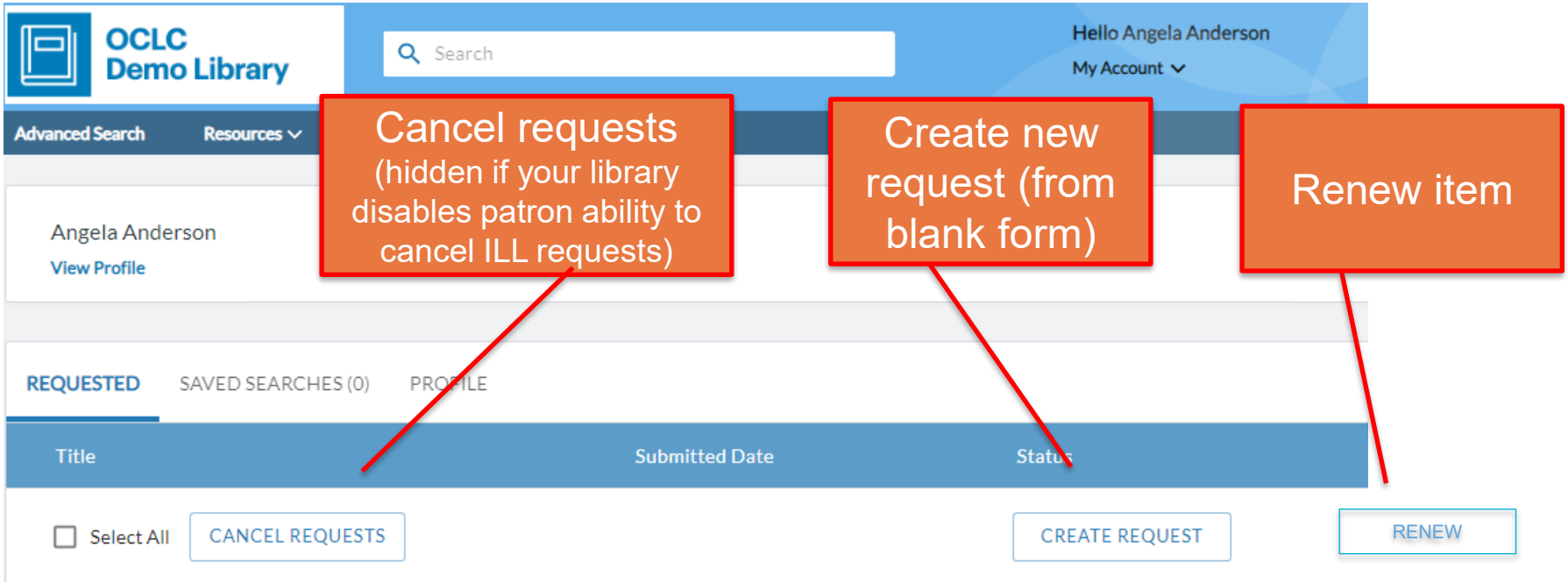
You might want to consider configuring circulation integration

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

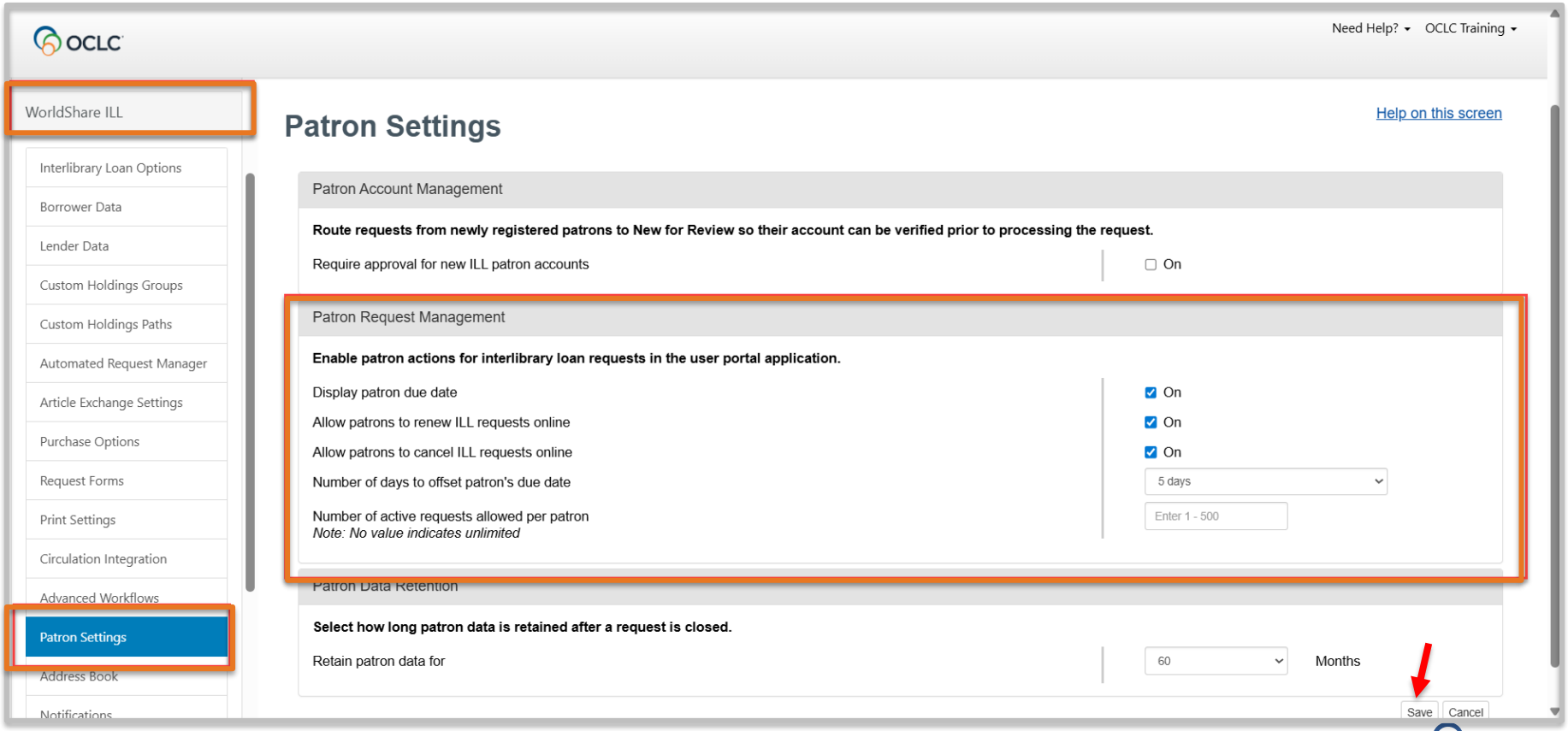
WMS Circulation integration (WorldShare ILS)

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

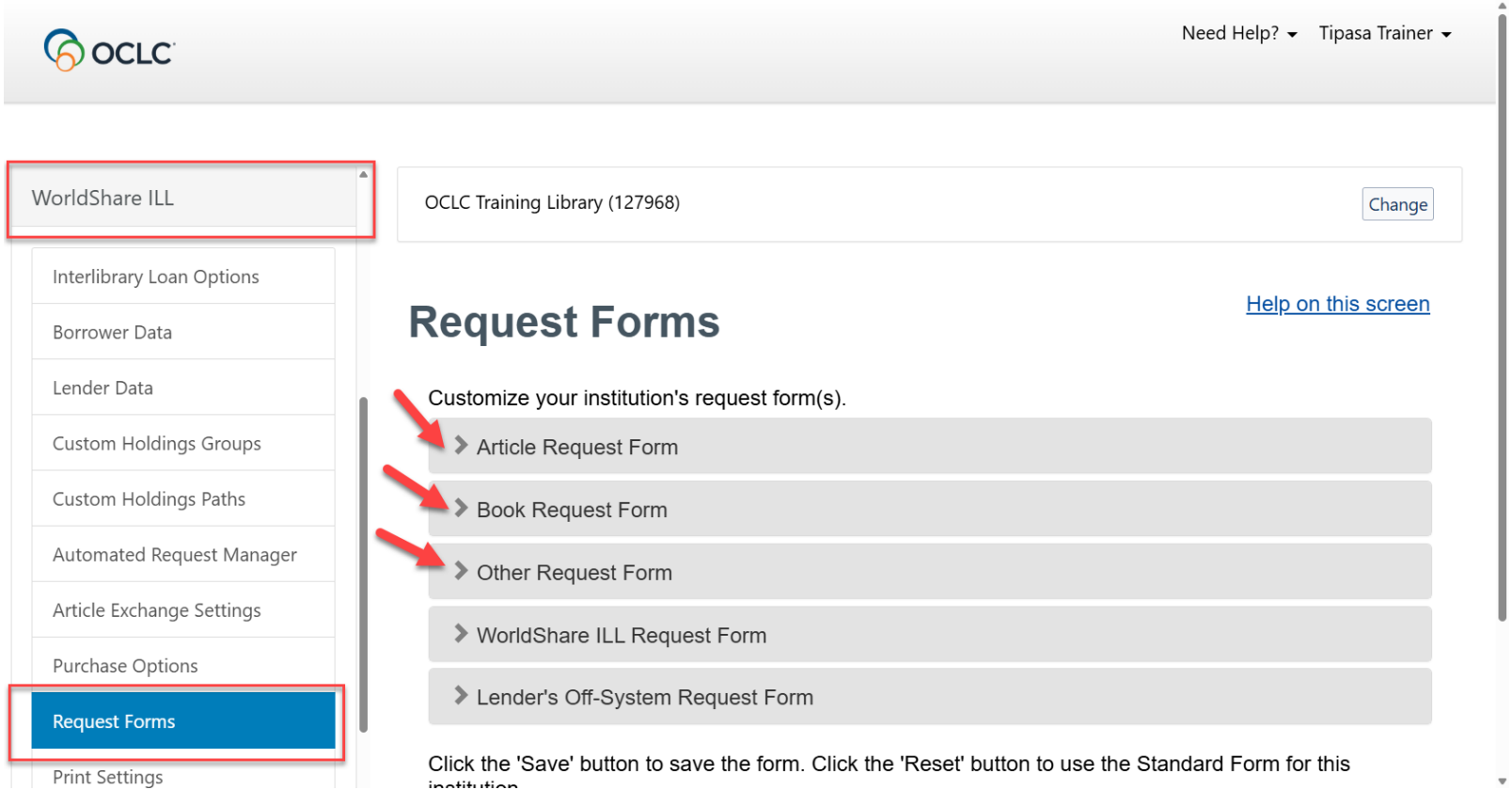
Patron configurations – My Account



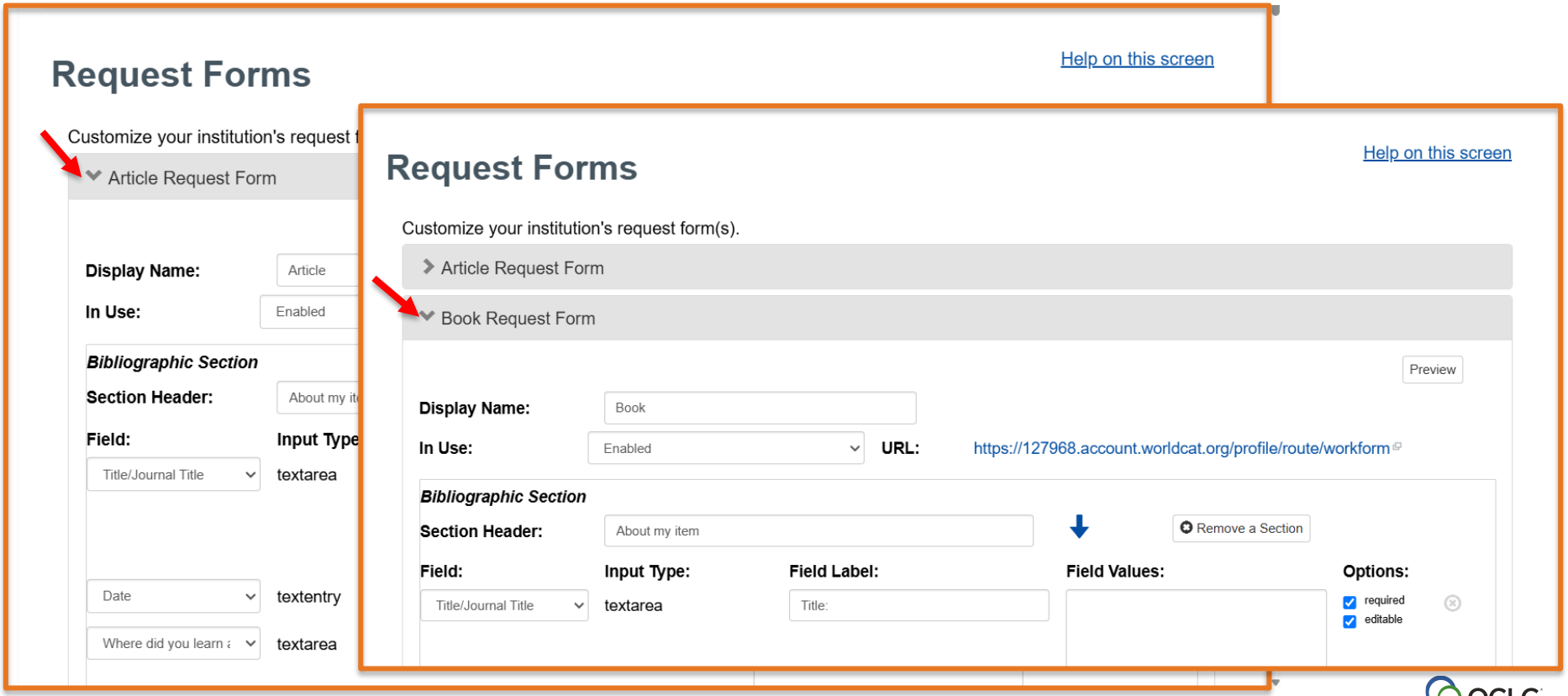
Patron configurations



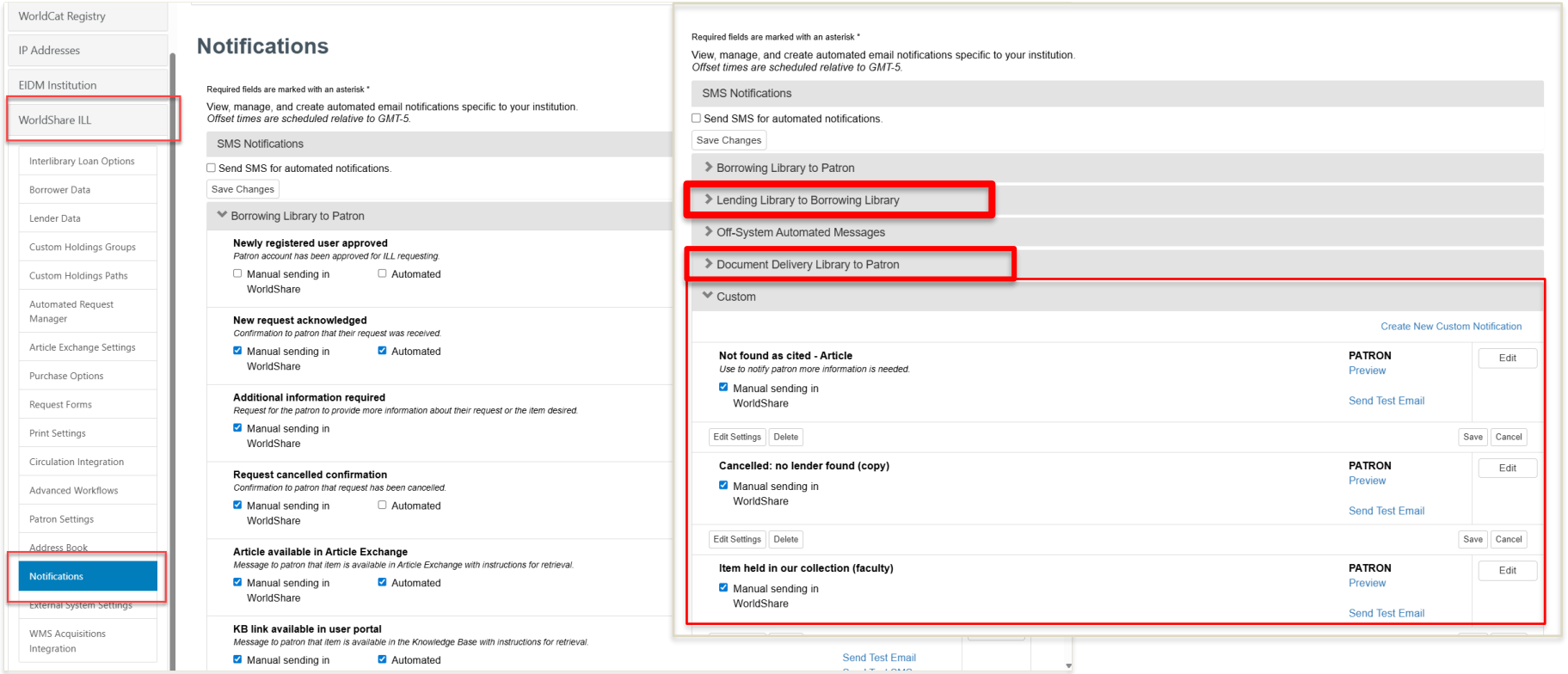
Patron configurations – Request form



Patron request form



Patron notifications

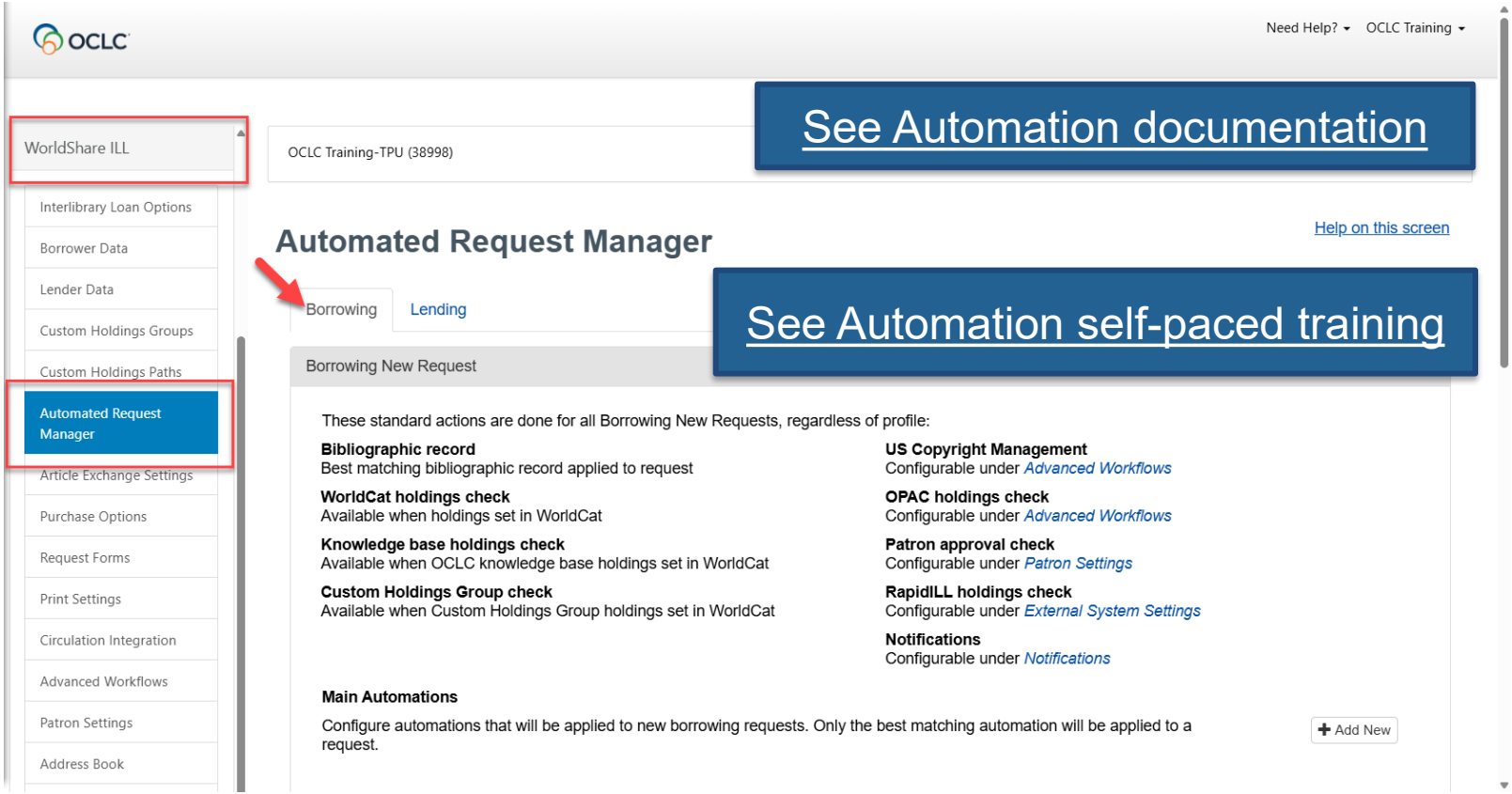


Some configurations to consider

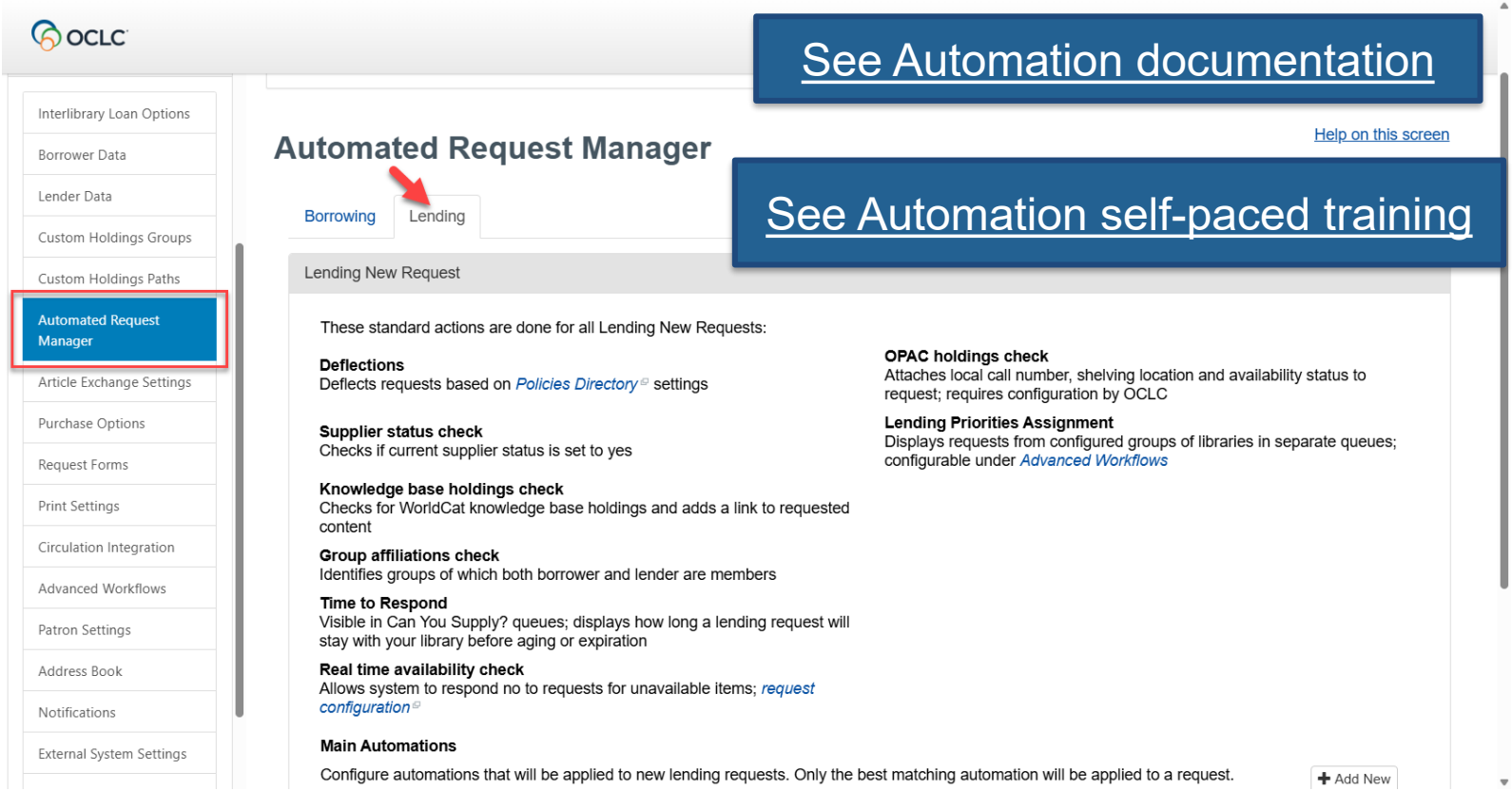
- OPAC integration
  - Item availability and shelf location
- Proven Senders
  - Trusted lenders to provide quality copies
- Priorities Lending queues
  - Your priority borrowers such as libraries in your group
- Advanced Lending workflows
  - Verifying, Retrieving, Scanning, Packaging

See OCLC Service Configuration for Tipasa

Automation - Borrower



Automation - Lender



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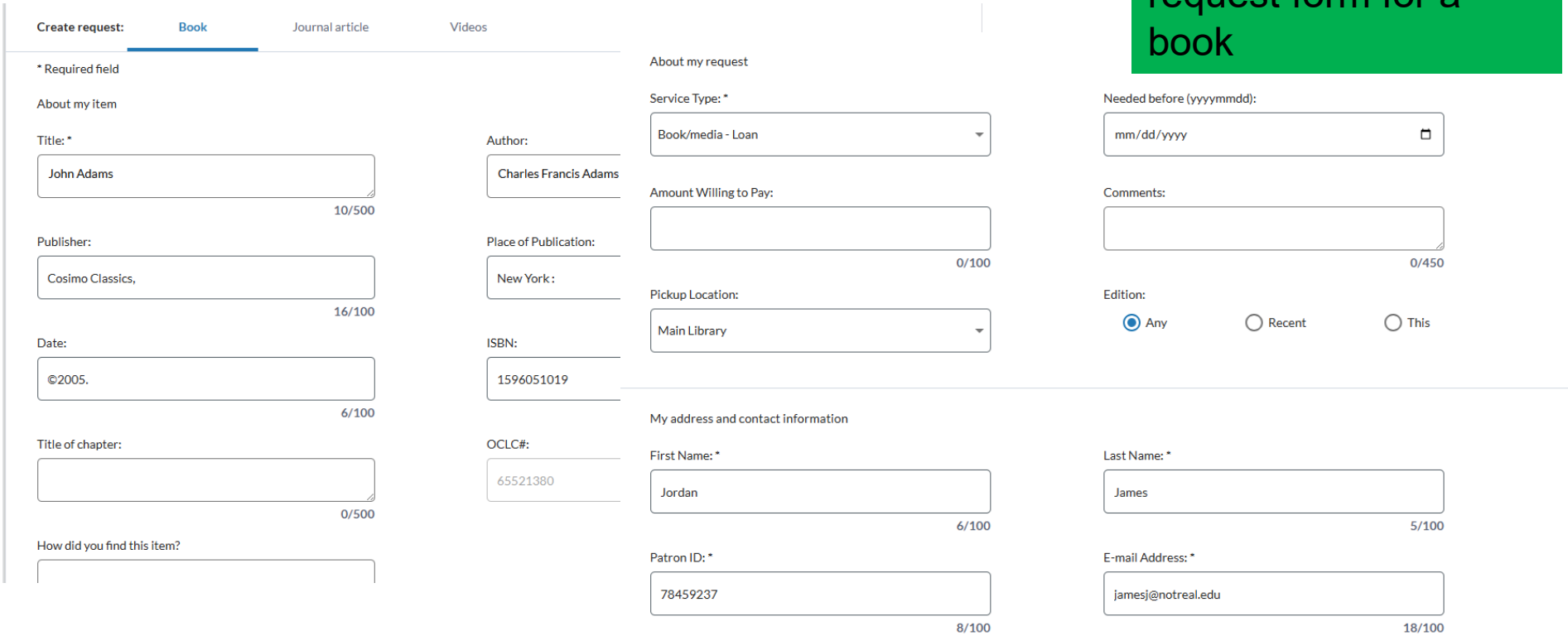
BASICS OF BORROWING WORKFLOWS

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

Author: Charles Francis Adams

Publisher: Cosimo Classics, 16/100

Place of Publication: New York :

Date: ©2005. 6/100

ISBN: 1596051019

Title of chapter: 0/500

OCLC#: 65521380

How did you find this item?

About my request

Service Type: * Book/media - Loan

Needed before (yyyymmdd): mm/dd/yyyy

Amount Willing to Pay: 0/100

Comments: 0/450

Pickup Location: Main Library

Edition: Any | Recent | This

My address and contact information

First Name: * Jordan 6/100

Last Name: * James 5/100

Patron ID: * 78459237 8/100

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

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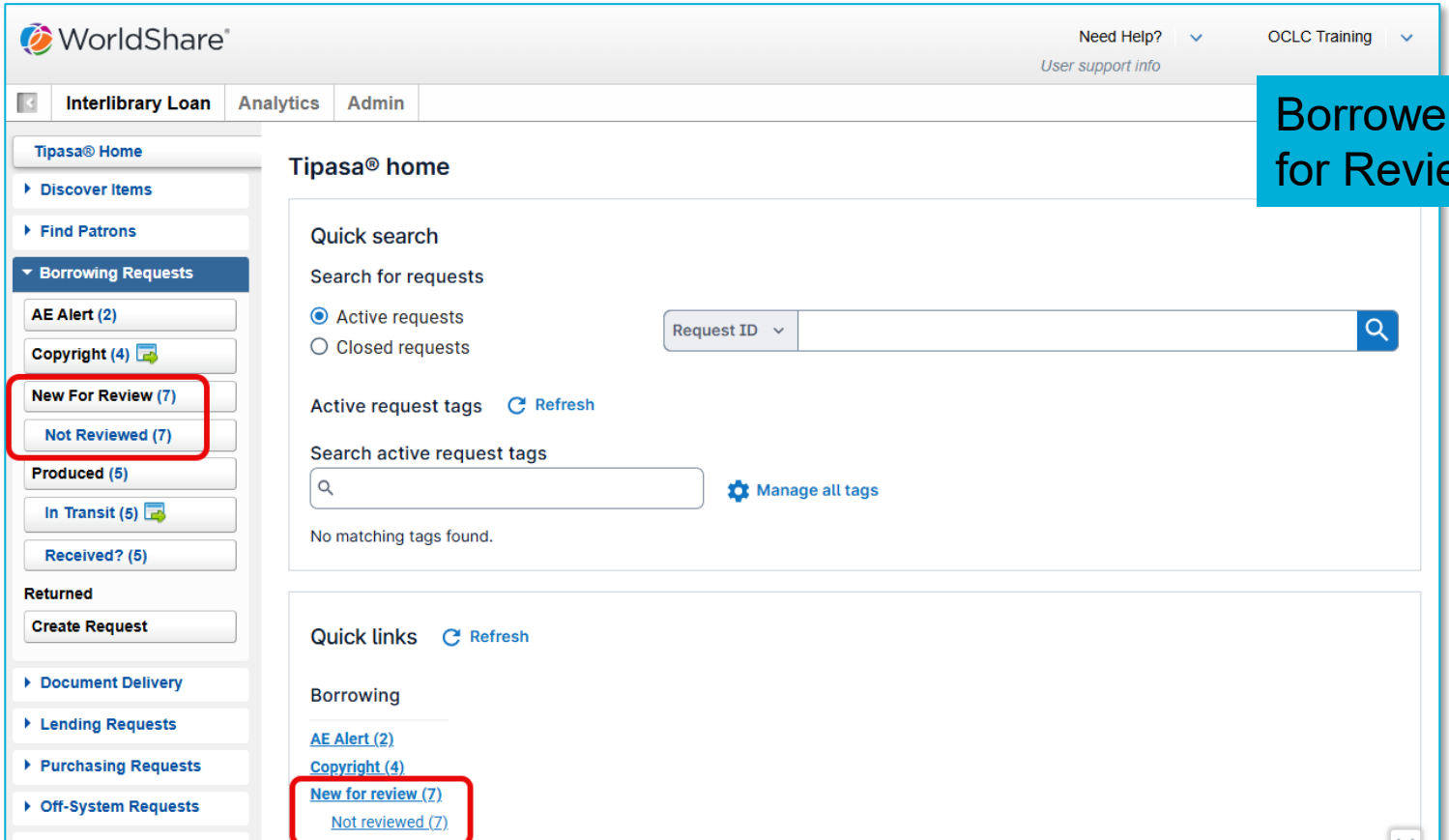
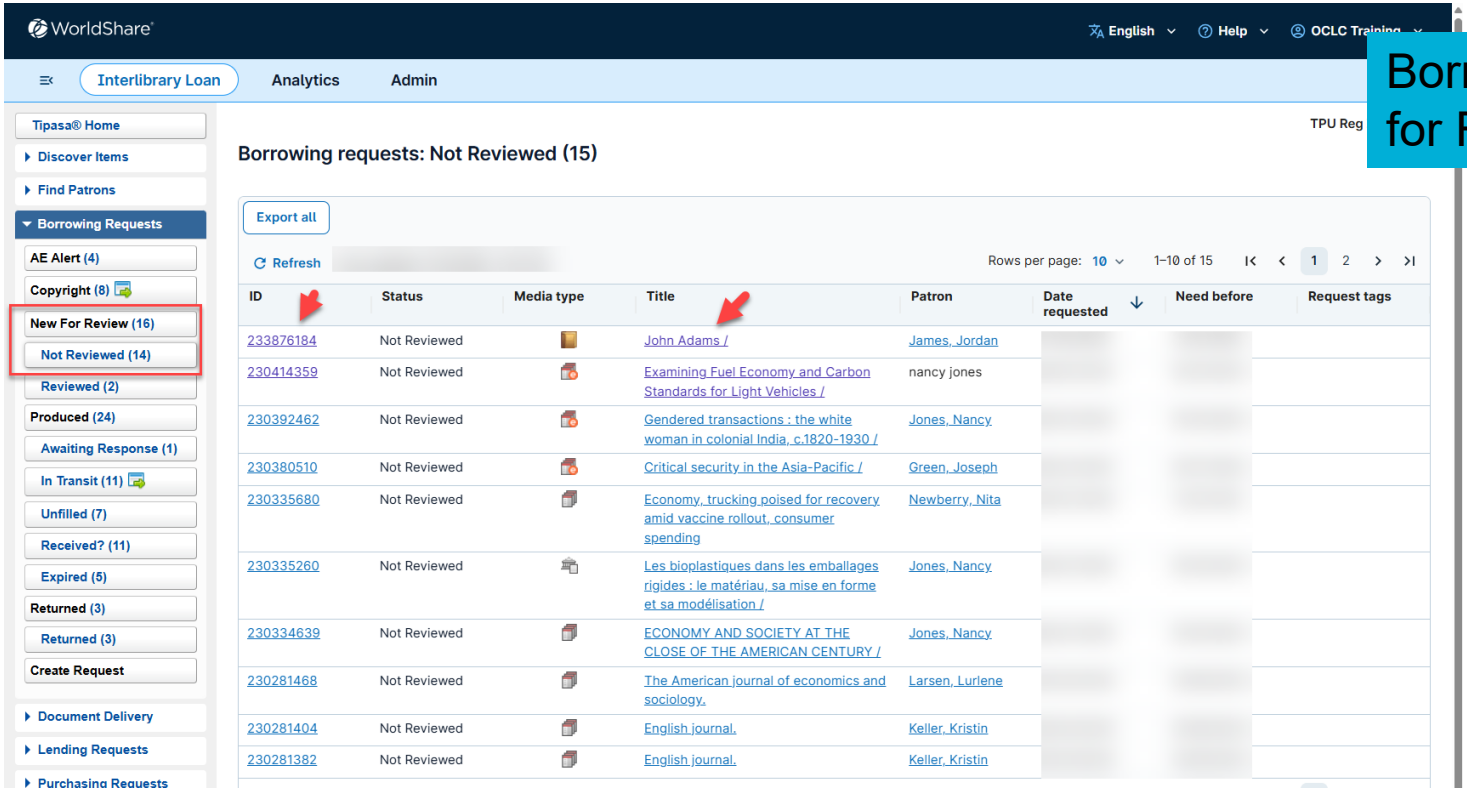
Life cycle for a loan request



Borrower: New for Review

Life cycle for a loan request



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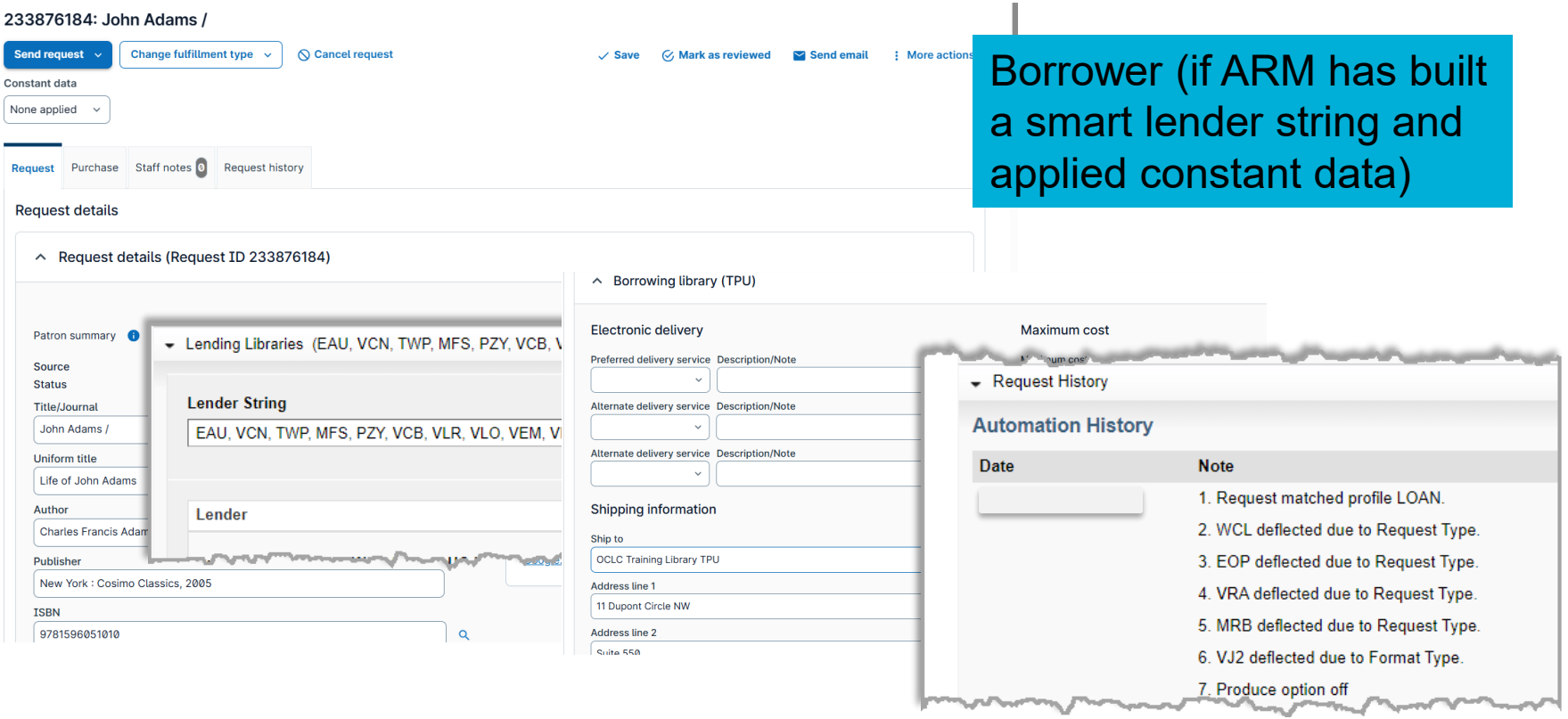
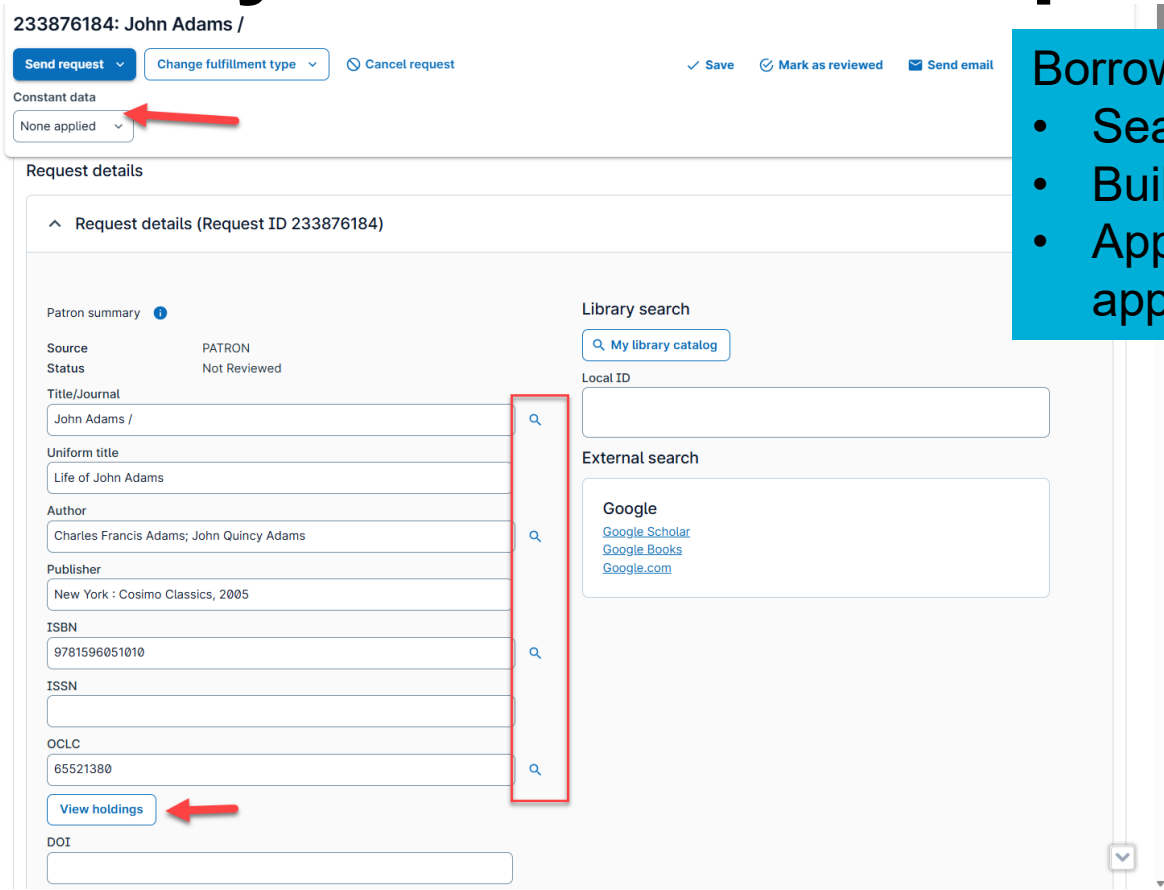


Borrower (if ARM has built a smart lender string and applied constant data)

Life cycle for a loan request



Borrower:

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

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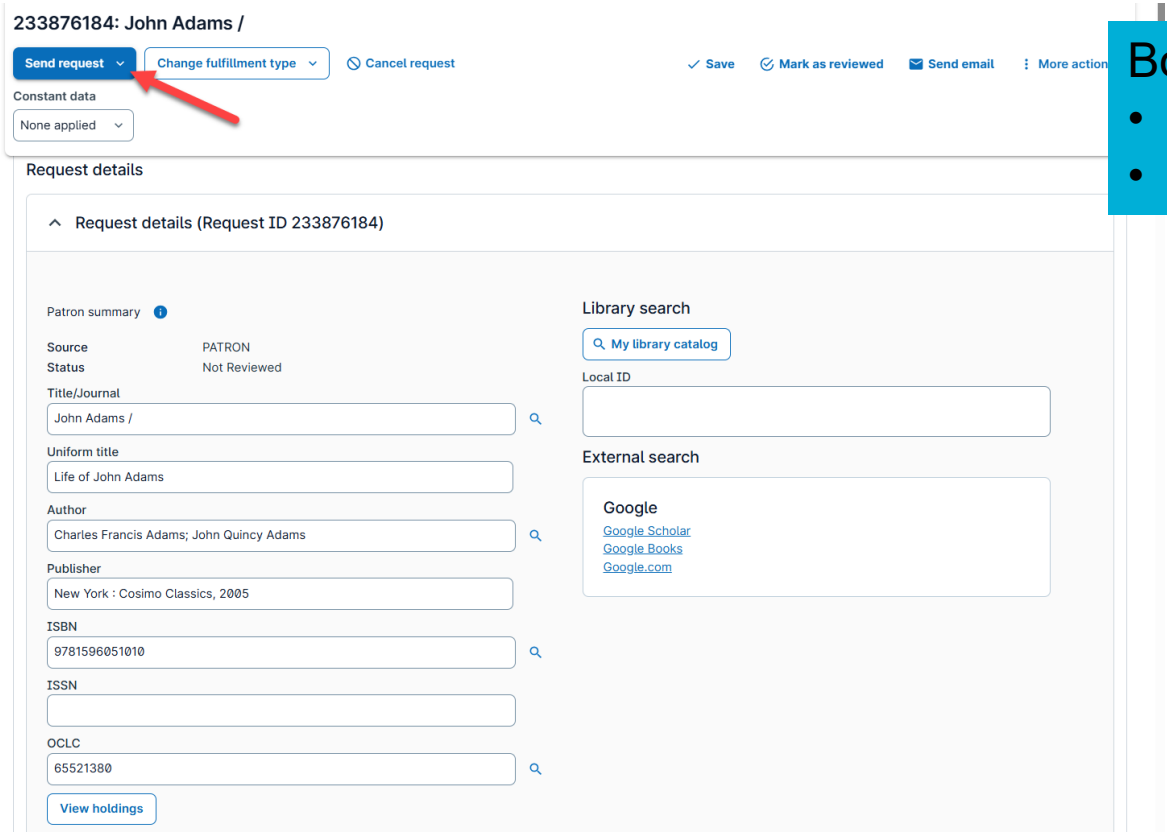
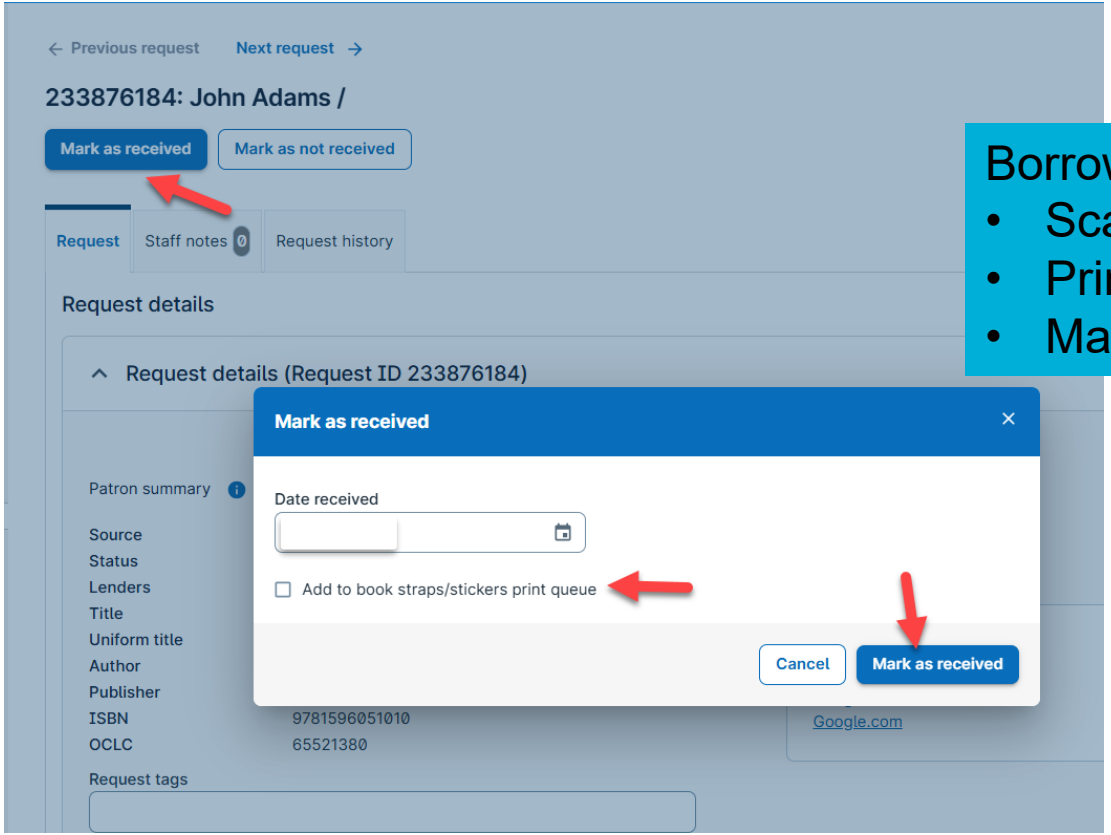
Life cycle for a loan request



Borrower:

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

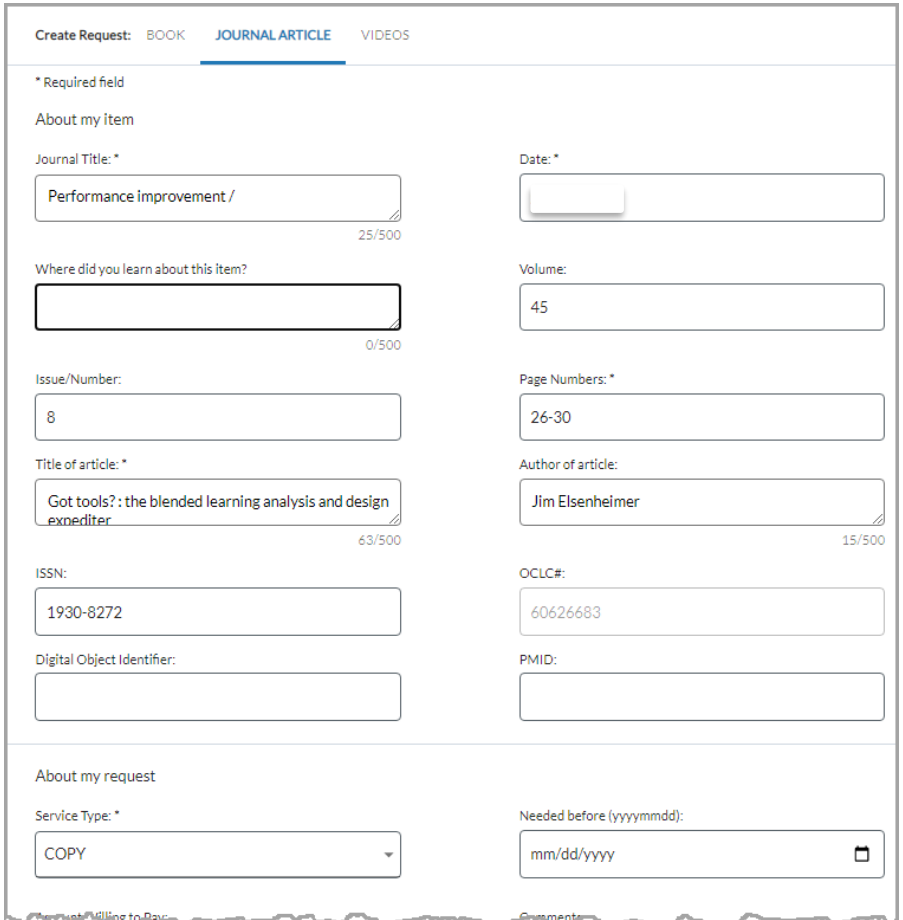
Life cycle for a loan request



Borrower: Book arrives in mail.

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

Life cycle for a copy request



Patron completes request form for a journal article

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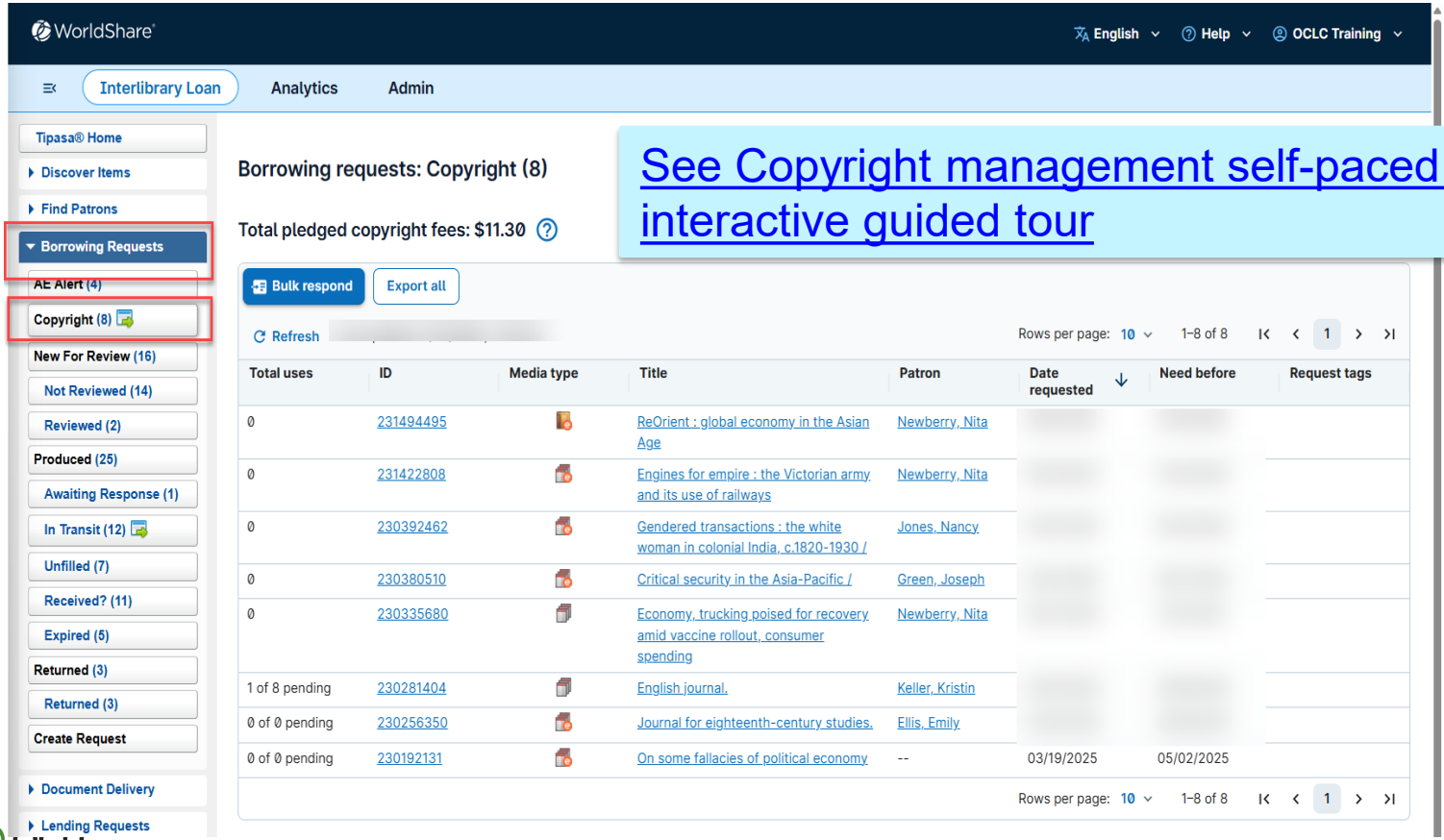
Copy requests can be “automatic”

- 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



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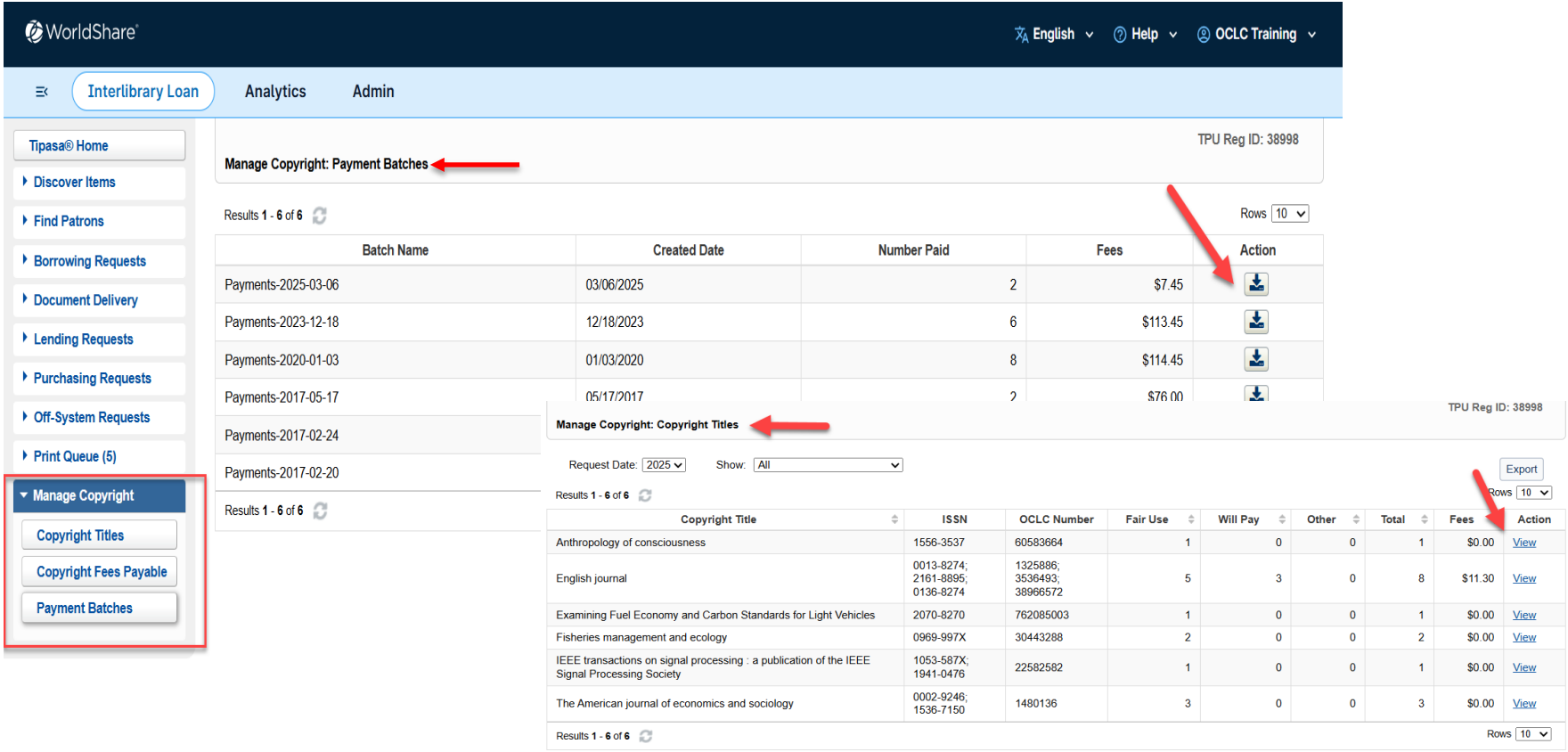
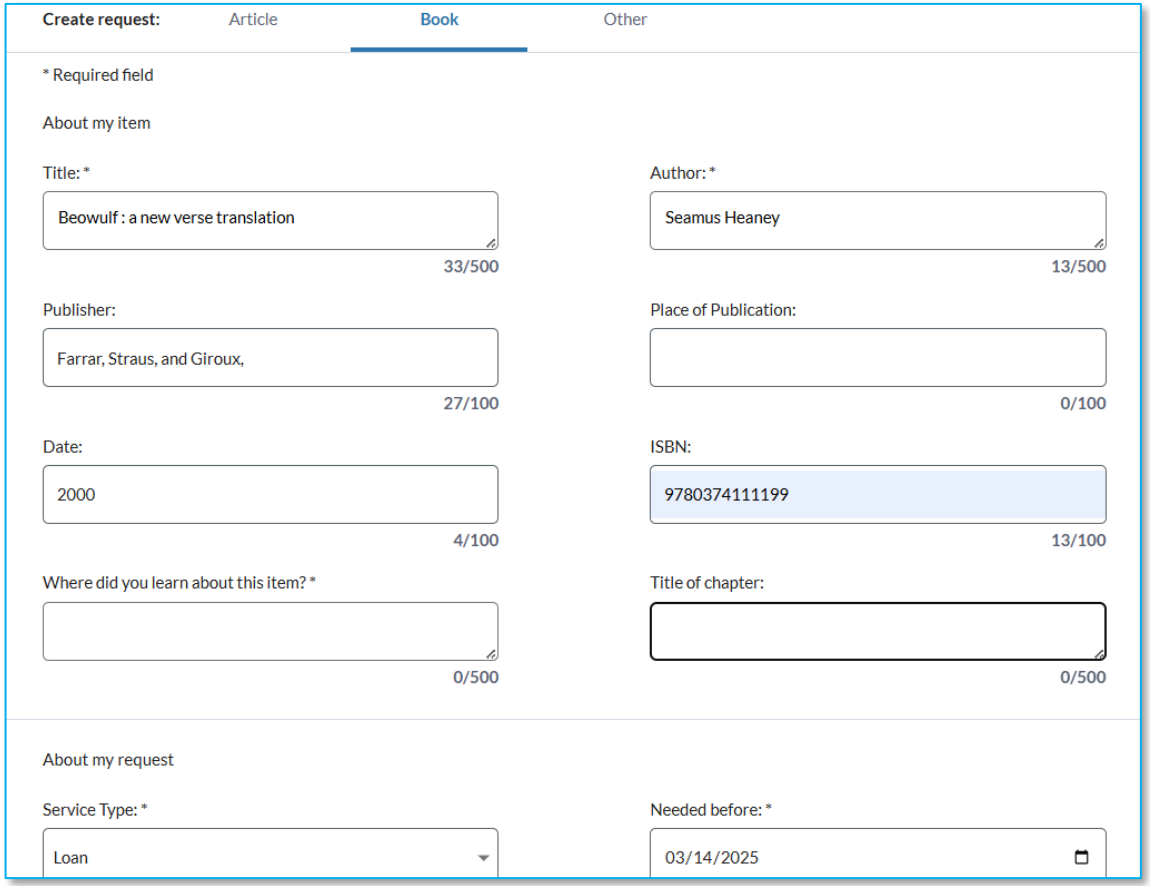


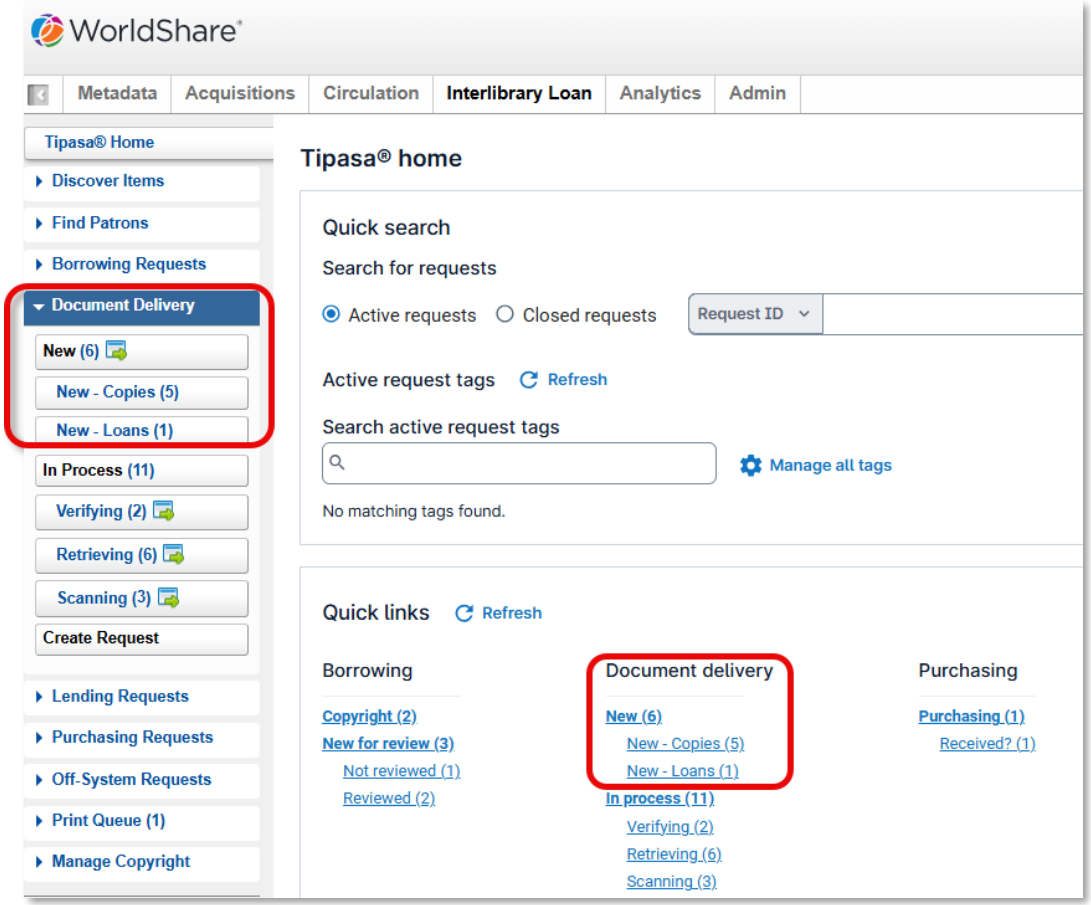
Life cycle for a Document Delivery request



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

OCLC

Life cycle for a Document Delivery request



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

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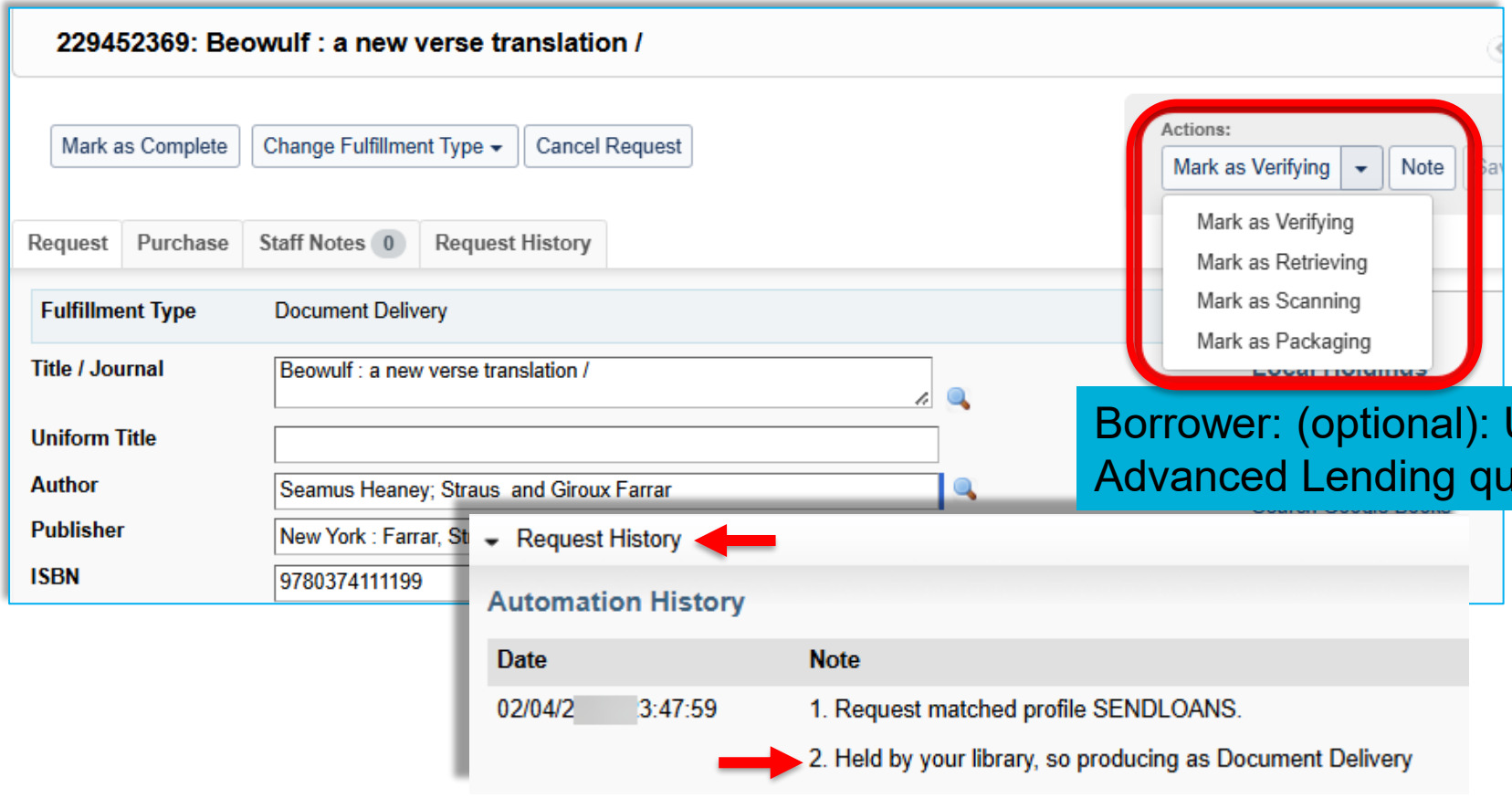
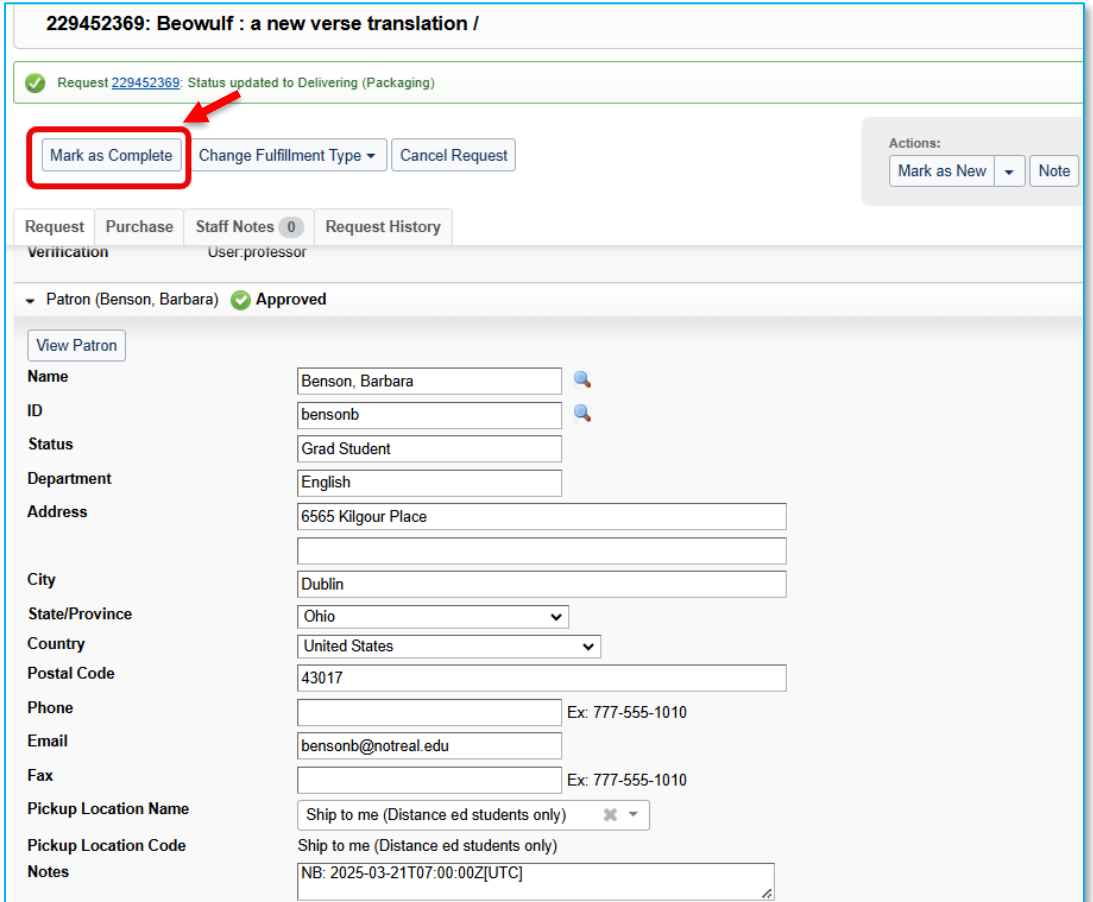
Life cycle for a Document Delivery request



Borrower: (optional): Use Advanced Lending queues

Life cycle for a Document Delivery request



Borrower: Mark as Complete

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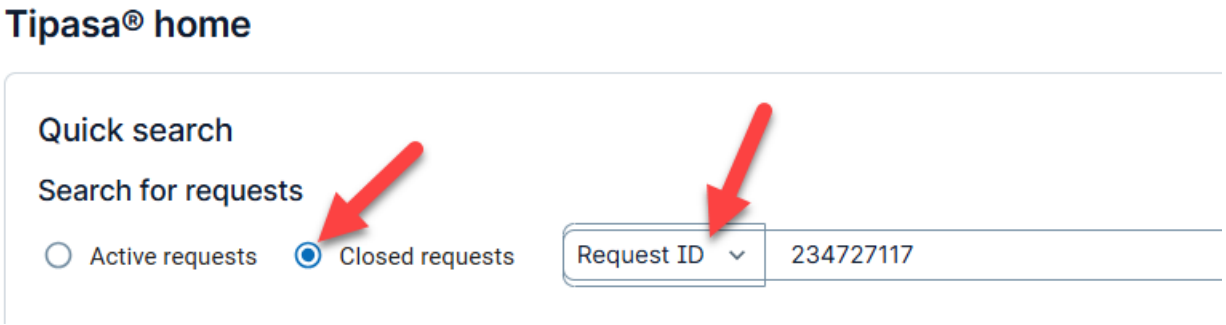
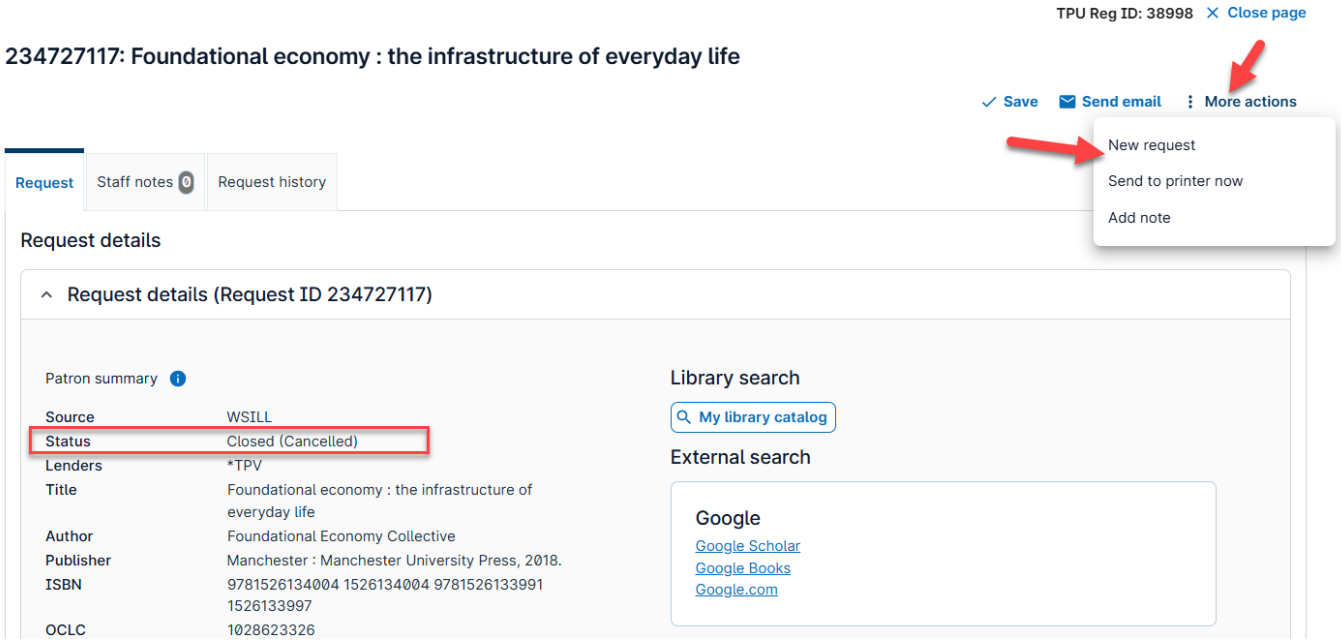
Reopen a cancelled request

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



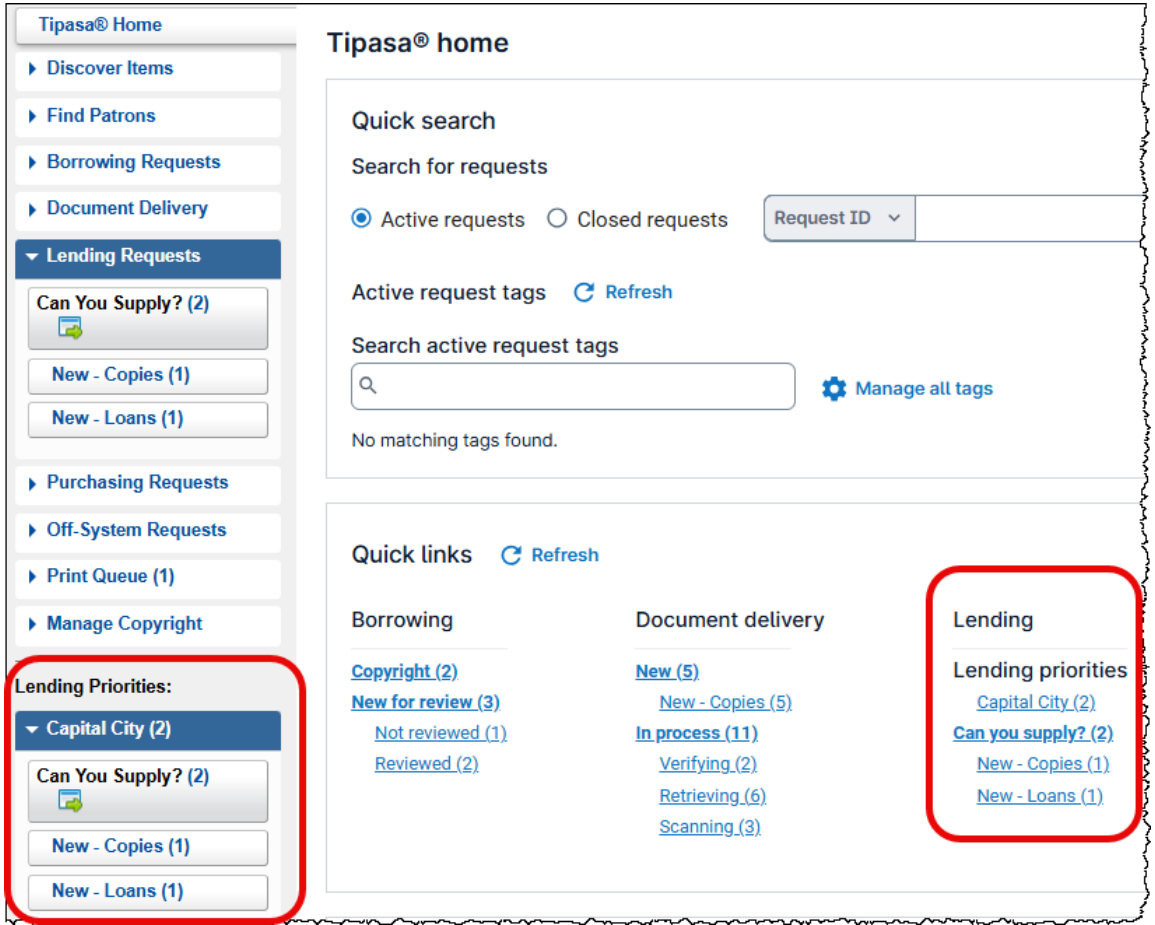
Reopen a cancelled request

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



BASICS OF LENDING WORKFLOWS

Life cycle for a loan request



Lender: Can You Supply? Lending Priorities

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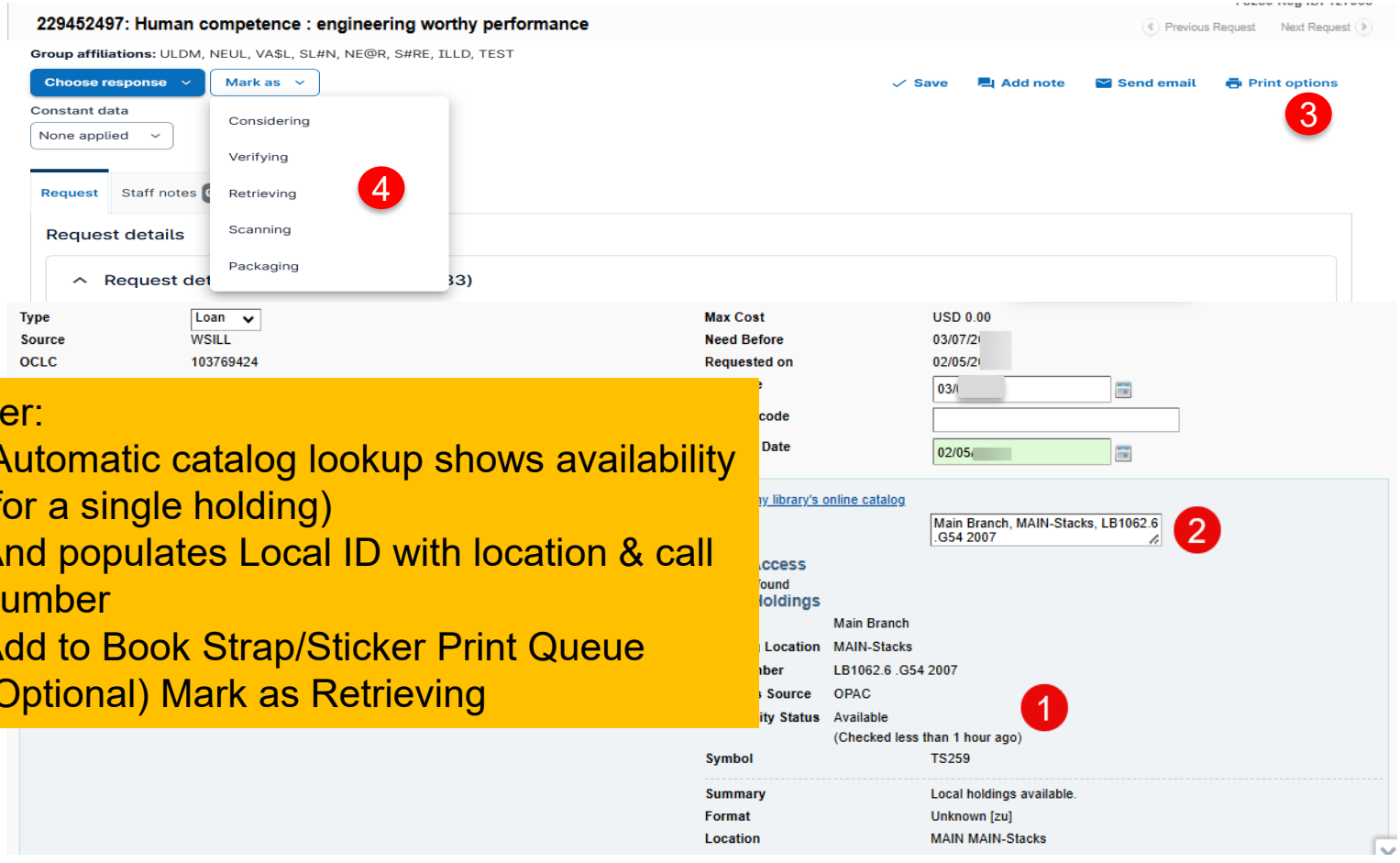
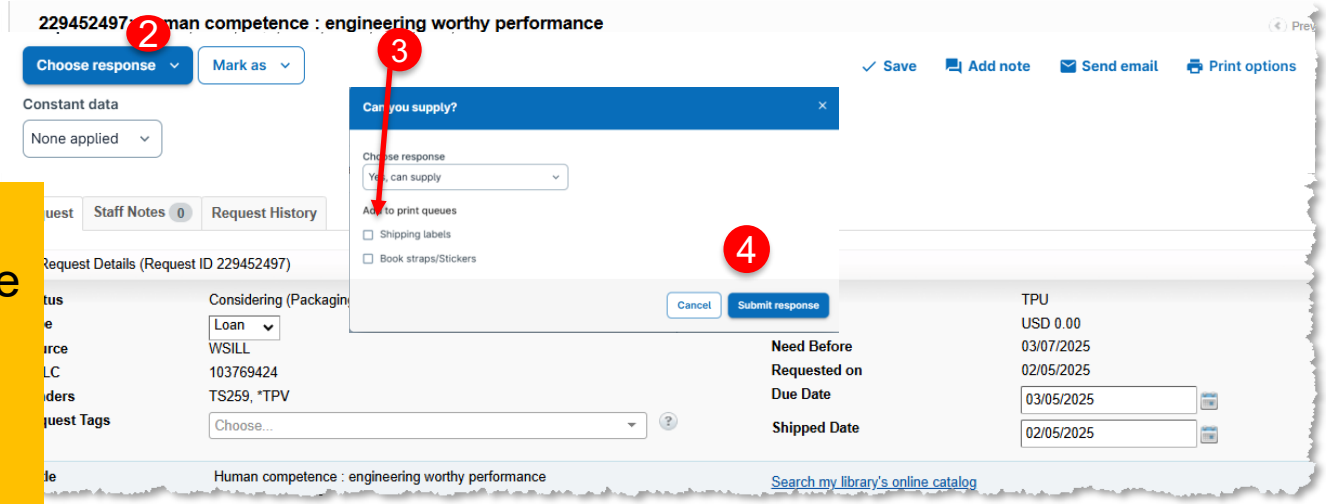
Workflow for a loan request (with OPAC integration)



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

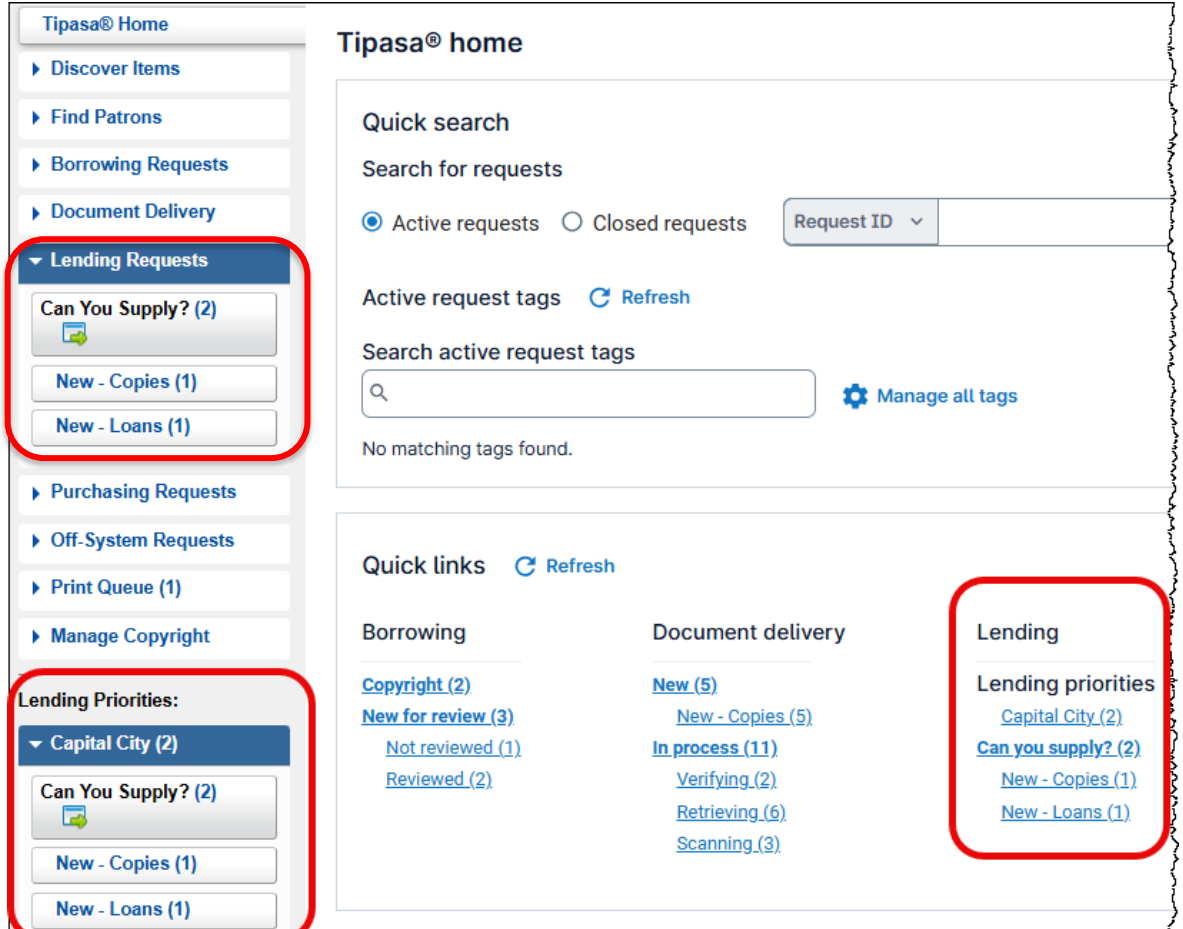
Workflow for a loan request



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

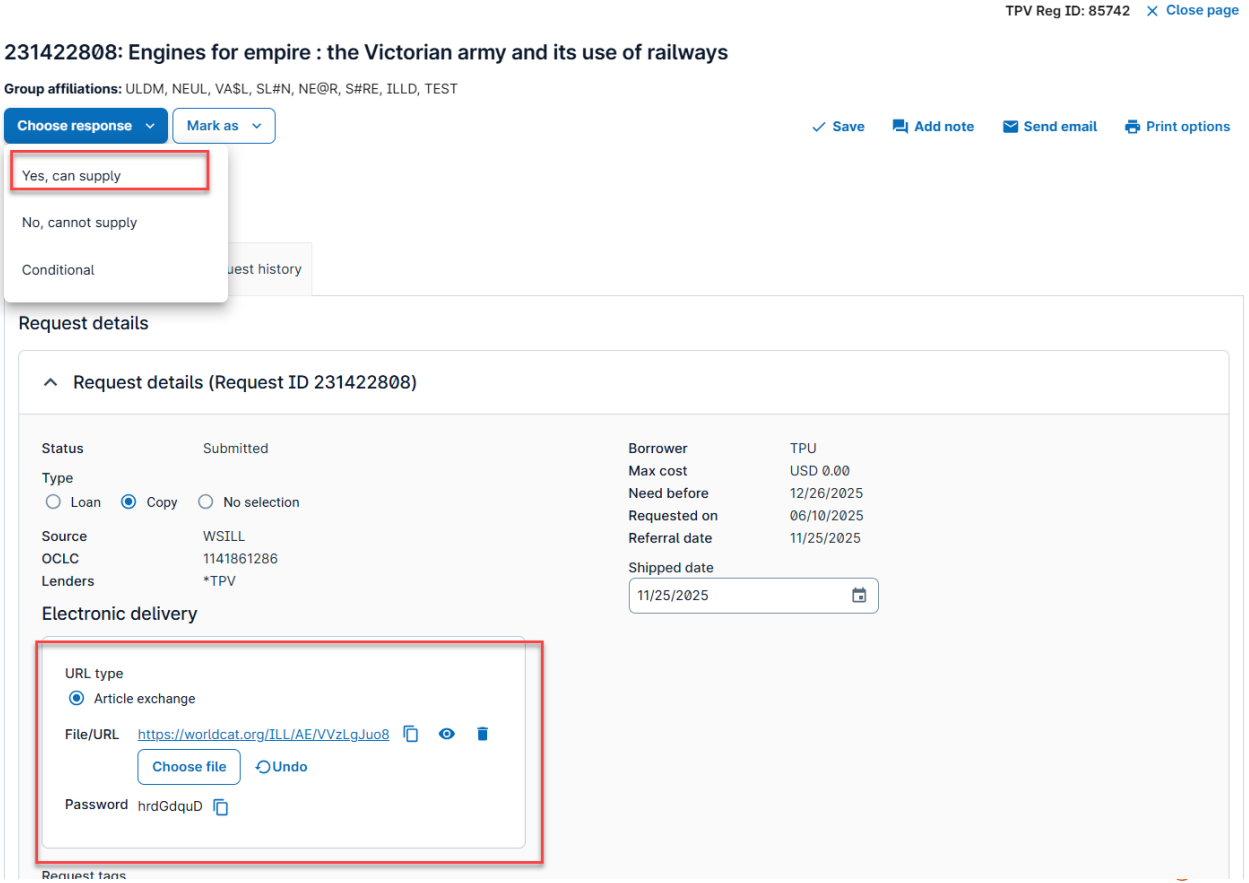
Life cycle for a copy request



Lender: Can You Supply? Lending Priorities

Life cycle for a copy request

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

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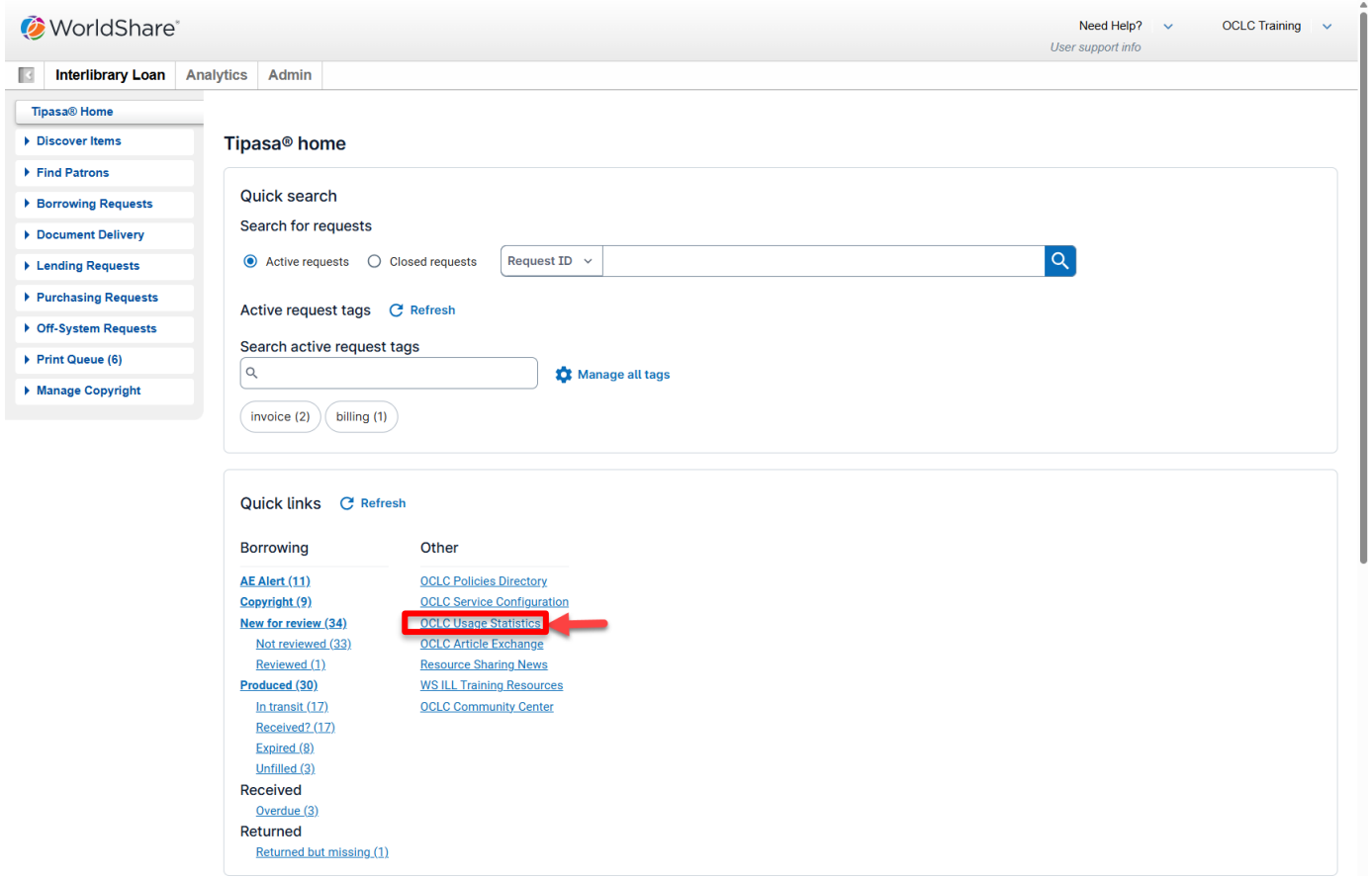
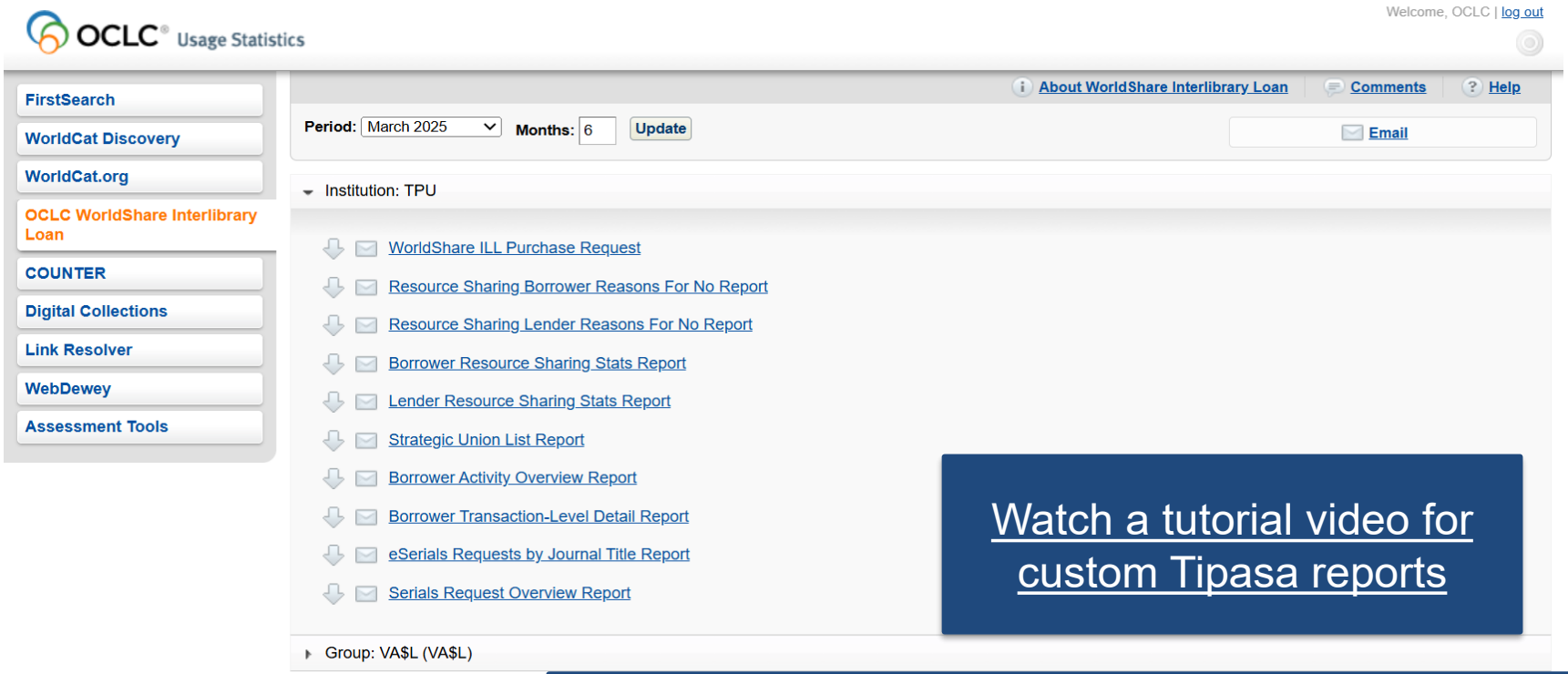
Usage reports



Usage reports



Watch a tutorial video for custom Tipasa reports

See Tipasa reports documentation

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The four topics…

1. How Tipasa works

2. Preparations for Tipasa

2 . Basics of borrowing workflows

3 . Basics of lending workflows

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Questions?

Contact OCLC Support in your region

https://help.oclc.org/Resource_Sharing/Tipasa

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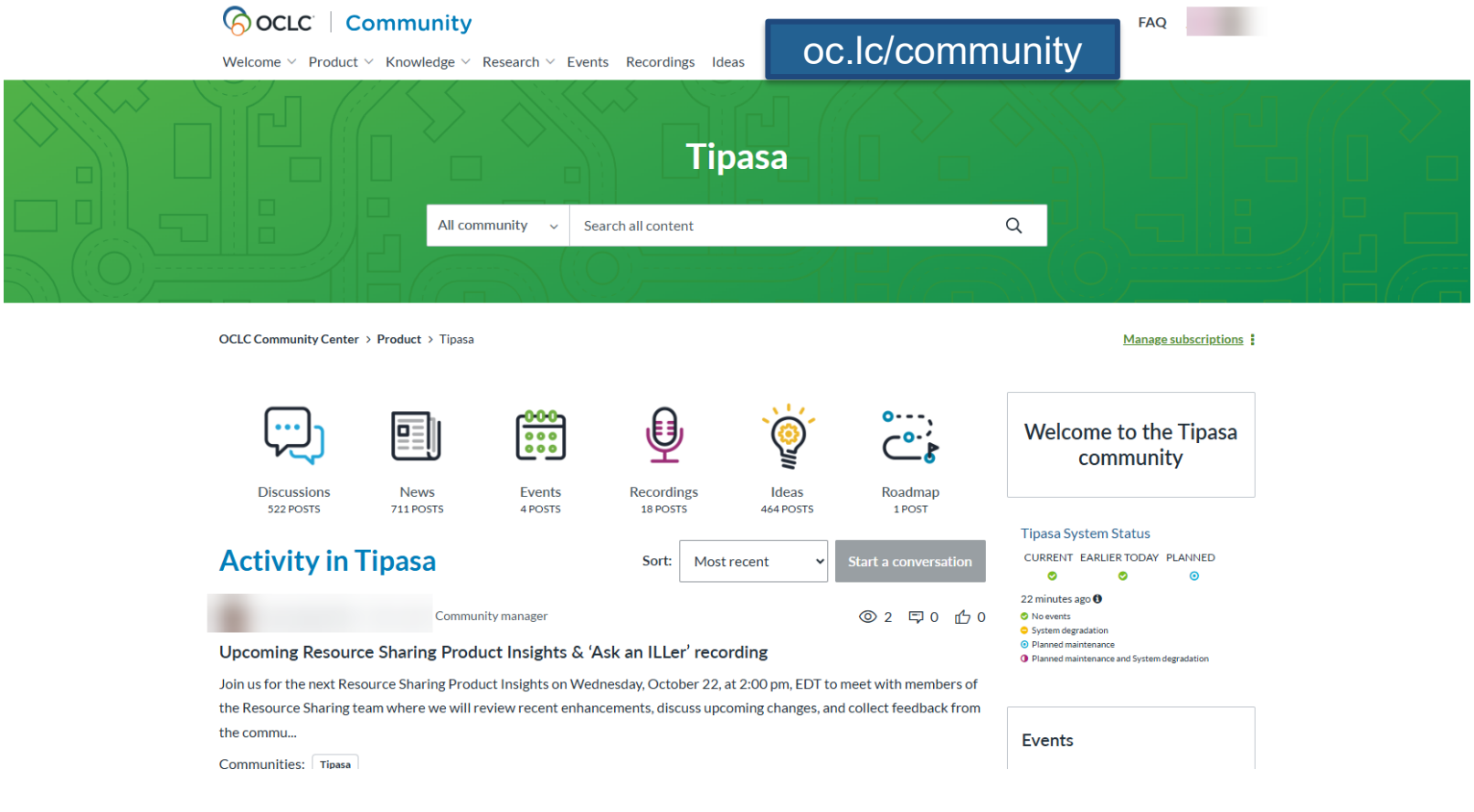
Tipasa Community Center



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

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