

## **Tipasa Lending workflows Transcript**

**1 July 2026**

### **Transcript**

#### **Timestamp (OCLC)**

0:00

So hi everyone, I'm Lucia Shelton. I'm part of the member education team at OCLC and today I'm facilitating your learning on lending workflows. Welcome to our training session. This session is being recorded and you will receive a follow up email message with.

#### **Timestamp (OCLC)**

0:25

The link to find the recording of this session and the handouts, the copy of the presentation and the learner guide to use as reference. I'm putting the link to the learning guide in the chat as well for you to retrieve that if you didn't retrieve that when you registered to the session. Tipasa training is a series of three live lead instructor sessions. Introduction to Tipasa.

#### **Timestamp (OCLC)**

0:59

Where you have an overview of how the service works and how you can prepare to use the service. Tipasa borrowing workflows where you learn about the borrowing activities in more detail. And.

#### **Timestamp (OCLC)**

1:17

Tipasa lending workflows this session. You can register for either available sessions or access a recording. If you have registered through the community center events page, you are automatically registered to receive a training badge and.

### **Timestamp (OCLC)**

1:37

After each session, if you did not register through the community center events page or you're accessing a recording, you can still receive your training badge by completing the form you find on this.

### **Timestamp (OCLC)**

1:53

URL on the screen, you can find that on the copy of the presentation. When you access this URL, the system prompts you to sign into the OCLC community center using your library's OCLC symbol.

### **Timestamp (OCLC)**

2:10

Or your library's name and your world share account. In this session, we are exploring four topics, but when you reach the end of this session, you will have learned about the available functionalities

### **Timestamp (OCLC)**

2:30

for a lending library in, so 1st you will learn what lending priorities queues are and how you can use them. Second, I will explain what advanced lending workflows are and how you can use them. Then I will cover the ways you respond to loan and copy requests.

### **Timestamp (OCLC)**

2:56

From your Can you supply queue, including using batch processing options and from your landing priorities queues as well. Finally, how to generate statistics reports. And of course I will show you where you find documentation and contact OCLC support if you need assistance. So basically the lending workflows start once

### **Timestamp (OCLC)**

3:25

the request is placed in the system and your library is considered as lender for the request. So if configured Tipasa checks item availability using your OPAC integration and the real time availability configurations and your automation along with your deflection policies. If the item is not available or does not.

### **Timestamp (OCLC)**

3:55

Circulate in ILL, then the request moves automatically to the next lender in the lender string. If the item is available, then Tipasa adds the shelving location to the local ID field on the request or it displays the available copies of the requested item for you to select one copy on.

### **Timestamp (OCLC)**

4:19

On the request. And automation applies your constant data. Then you retrieve the item, check that item out in your library system.

### **Timestamp (OCLC)**

4:36

Print the shipping label and ship the item to the borrower. You can use your lending priorities queues and advanced the lending workflows when configured. Then when the the physical item is returned.

### **Timestamp (OCLC)**

4:52

You complete, you close the request. It works a little bit differently from, for libraries with fulfillment integration or circulation integration because then the system automatically checks the item out and moves that item to.

### **Timestamp (OCLC)**

5:12

To an ILL temporary location and upon return the system checks the item in and backed that item to its permanent location. Permanent local location. So let's start with the concepts of lending priorities. The lending priorities queues enable you to designate a group of.

### **Timestamp (OCLC)**

5:40

Of libraries as priority borrowers. Those to whom you want to give special service like consortia, e.g.. All incoming requests from institutions identified as priority borrowers.

### **Timestamp (OCLC)**

5:55

Will be visible in a special set of lending queues that you identify on the homepage. You can consider using lending priorities.

### **Timestamp (OCLC)**

6:11

If your library's a member of a consortium, if you need to give priority to request within your state or region, if your library has.

### **Timestamp (OCLC)**

6:27

reciprocal agreements with other libraries or other groups. You want to give special handling to requests from libraries that are on your career service, e.g., and you can configure up to five lending priorities queues.

### **Timestamp (OCLC)**

6:47

Most libraries configured no more than two priority queues, but you have up to five.

### **Timestamp (OCLC)**

6:54

Let's move to the concepts of advanced lending workflows, another option as a lending library. The advanced lending workflows feature provides four additional queues within the lending workflows

### **Timestamp (OCLC)**

7:14

when you are responding to requests, they are verifying, retrieving, scanning, and packaging. As a note advanced lending workflows do not change your days to respond.

### **Timestamp (OCLC)**

7:29

The purpose of this option is to streamline the process when you have more than one person in your library working on ILL. And once you have enabled the advanced lending.

### **Timestamp (OCLC)**

7:45

Workflows option, you will have access to the four queues on the request, and this appears on the upper right side of the request for you to select. So.

### **Timestamp (OCLC)**

8:03

These queues give you more options to manage your workflows and you manually move the request through the queues as you process them prior to responding. So this is very useful if your library processes high volumes of requests from other libraries.

### **Timestamp (OCLC)**

8:23

Or has different staff members responsible for different steps in the lending process. So in this table you see on the screen, on the copy of the presentation you have this table. This table provides examples of how you could use advanced lending workflows.

### **Timestamp (OCLC)**

8:43

Depending on the number of staff involved. E.g., if you have several staff, you might want to use all the options. While if you, you are the only person doing ILL, you might not use any of those options. And these are just suggestions for

### **Timestamp (OCLC)**

9:06

Best practice. So if your ILL operation is large, you should consider using advanced lending workflows in conjunction with the lending priorities. It's available there as well.

### **Timestamp (OCLC)**

9:26

Both lending priorities and advanced lending workflows are configured enabled in OCLC service configuration under world share ILL, then advanced workflows. You can enable advanced lending.

### **Timestamp (OCLC)**

9:43

And then you can enable the lending priorities queues. You need to give a name to your queue and then add your custom holdings groups. You needed to configure your custom holdings groups before.

### **Timestamp (OCLC)**

9:59

To be able to select them here. And there's a link here to documentation on how to configure custom holdings your preferred libraries. And then you have the add row.

### **Timestamp (OCLC)**

10:16

button here if you want to add additional lending priorities queues, and you save everything for the system to set your configurations. And again, you can configure up to five lending priorities queues.

### **Timestamp (OCLC)**

10:33

Article Exchange is a resource part of the service and it's the option for you to supply copy requests. Article exchange includes OCR, optical character recognition. So OCR turns the PDF file into.

### **Timestamp (OCLC)**

10:56

Machine readable document that allows the end users to search, highlight, and edit the document and helps with accessibility as well. OCR supports over 120 languages. So you can upload up to a thousand files a day per authorization and that the file expires in 30 days or.

### **Timestamp (OCLC)**

11:24

For five reviews. It does not count for staff preview.

### **Timestamp (OCLC)**

11:32

If your library has configured circulation integration as a borrower, it works as a lender as well. So, when you have circulation integration configured, you see the circulation section on the request.

### **Timestamp (OCLC)**

11:51

As you see here on on the screenshot on the left. And here on the right is an example of a temporary record that the system creates automatically for the borrowing library in this integration. This is an example from a WMS library.

### **Timestamp (OCLC)**

12:11

WorldShare Management system as ILS. Your ILS might look a little bit different. This is to illustrate the temporary holding location and shelf location as a lender. So what happens with circulation integration, you configure this temporary holding location for the system.

### **Timestamp (OCLC)**

12:36

To place that item there for ILL purpose and later check that item into its permanent shelf location. This WSIL is the temporary that you configure in the circulation integration. The item will be here while you're doing

**Timestamp (OCLC)**

12:56

ILL and after that the system automatically sends that item back to its permanent location.

**Timestamp (OCLC)**

13:08

Any questions so far? You can use the chat if you have any questions. Now let's go live to see how everything fits together and how you answer loan and copy requests.

**Timestamp (OCLC)**

13:28

From your regular can you supply queue and from your lending priorities queues. Then how you can apply the advanced lending workflows while you're working on your request. I will show you how you set up your pick list and use batch processing options as well.

**Timestamp (OCLC)**

13:48

So let me share my browser here and you can go and see how those things work. So we are here, this is the homepage.

**Timestamp (OCLC)**

14:08

Let's start with the lending priorities queue. So you'll find your lending priorities queue from the home page here in the middle section under quick links or on the left side panel here you will see your queues listed here.

### **Timestamp (OCLC)**

14:28

So let's open. The requests that, that are here in your lending priorities queues, they are also in your leg regular can you supply queue, but they are here in those separate queues for you to give that special attention to those requests.

### **Timestamp (OCLC)**

14:48

As for your priority libraries. So let's see here you have your list of copies and loan requests and everything that you have available in your regular can you supply queue under lending request you find here under your lending priorities. So let's open a loan request.

### **Timestamp (OCLC)**

15:12

So here loans. Here on the right column or time to respond, you would see the ones that are expiring 1st on the top of the list for you to give attention. You don't need to follow the order.

### **Timestamp (OCLC)**

15:29

But e.g., if you have a request that it's expiring in 12 h or in one day, you need to give special attention to that request or otherwise that request will expire from your queue and be automatic automatically sent to the next lender and the.

### **Timestamp (OCLC)**

15:49

So let's open this request here. You can click either the ID or the title link. So when you have OPAC integration.

### **Timestamp (OCLC)**

16:07

For pack integration, what it does, it locates that item in your shelf's location, check availability as well and populates the local ID field with that information. This information.

### **Timestamp (OCLC)**

16:26

Is printed on the bookstraps if you print the bookstraps and on the request as well for you to retrieve that item from the shelf. And the integration into works for any library system you can use for set setting up real time

### **Timestamp (OCLC)**

16:46

Availability using Z 3950 to check your catalog.

### **Timestamp (OCLC)**

16:55

So the question, what exactly does the look for, including codes in the matching record? I received numerous requests where the call number is not identified. I have been told the real time availability is activated. The real time availability is looking.

### **Timestamp (OCLC)**

17:15

Looking into, ISBN, ISSN, OCLC number if available. It's looking into the title, it's looking into the auto, the basic information that for the record that's looking in the format of material as well.

**Timestamp (OCLC)**

17:36

To identify that item, and you have if you're not receiving that if it's not identifying this information for the integration, you, you need to check if your pack integration is activated for your.

**Timestamp (OCLC)**

17:56

Library too, because if it's not, you wouldn't see this even though the system is finding the availability for that item, if your integration is not enabled along with the real time availability, then you, you wouldn't see this information here. So it's looking at all that basic information for the record to populate your shelf location, so it's looking into your catalog using Z39 50.

**Timestamp (OCLC)**

18:31

Yeah, if you if the problem still persists, I would recommend you to contact OCLC support.

**Timestamp (OCLC)**

18:43

And ask them to take a look at your configurations, ok? So it's populating the local ID field. Then the next step here, you can.

**Timestamp (OCLC)**

19:01

Print this to retrieve that item, so you can add this to your print options. You can add it to bookstraps or you can print the request or you can, now you can add the request to print the queue as well. So let's add it to the.

### **Timestamp (OCLC)**

19:17

Bookstraps, then another option you have here is the advanced landing workflow, so you see this mark as when it is enabled, you see those four options for you to select.

### **Timestamp (OCLC)**

19:35

So you can, e.g., add this request to retrieving. It does not change your days to respond. It's just for you to put the request in different workflows in stages as you are working in your request. And your request will go to the.

### **Timestamp (OCLC)**

19:55

Retrieving queue. Then you can go to your printer queue, you can print that bookstraps or request, then retrieve that item. You see that the information

### **Timestamp (OCLC)**

20:17

on the local ID field prints on the bookstraps, you can print this. Retrieve that item, then your request will be here under the retrieving queue under the lending priorities. And from here, you can select that.

### **Timestamp (OCLC)**

20:39

Request and then respond, you can set to print the shipping labels and respond to yes and ship that item to the borrower.

**Timestamp (OCLC)**

20:55

Okay, I forgot to apply my constant data here. If you have automation, the system applies your constant data. You don't need to manually apply your constant data here, ok?

**Timestamp (OCLC)**

21:12

So that's sent. You have another situation here. Let me open another loan request. In this case here.

**Timestamp (OCLC)**

21:28

You have more than one record, more than one copy available in your system. So you find this button for you to select the record. And you can select that record, go to the shelf location.

**Timestamp (OCLC)**

21:47

And locate that item. If that item is not available, you can return to the request here and select another copy, the copy that's available. Then you can apply that. Now, when you select, now you have that information, the local ID.

**Timestamp (OCLC)**

22:04

You can send this to the bookstraps, stickers mainly if you are processing in batch, if you are responding batch, and then you can mark this as retrieving, e.g..

### **Timestamp (OCLC)**

22:19

If you're not using advanced landing workflows, you can just print the bookstraps from here and responded directly from the request, ok? So now this request is under retrieving.

### **Timestamp (OCLC)**

22:40

Let's do with another one, and this one if you don't have the integration, that's how you see your request. You can still search your library catalog for that item.

### **Timestamp (OCLC)**

23:00

And then copy and paste to the shelf location. Let me add anything here.

### **Timestamp (OCLC)**

23:11

Save it, and then you can send this to the bookstrap stickers, then use the advanced the landing workflows, which is optional if you you don't need to.

### **Timestamp (OCLC)**

23:29

To add it to this queue. So now I have all the two requests under my retrieving. So the requests are here under retrieving.

### **Timestamp (OCLC)**

23:45

I can batch process, this request using the bulk respond. One catch here if your library has circulation integration, we do not recommend using the bulk respond yes, because then.

### **Timestamp (OCLC)**

24:03

The system cannot communicate, we have problems communicating to multiple requests and changing the shelf location for each request to the temporary shelving location and then back to the.

### **Timestamp (OCLC)**

24:20

Permanent location, ok? So bulk respond, you can either respond directly from here, or you can move this to the next stage in the advanced landing workflows like packaging, e.g..

### **Timestamp (OCLC)**

24:39

So I can select the the request and move to the next stage as packaging, and the request will be under, will be under packaging

### **Timestamp (OCLC)**

24:55

queue and from here, you can use the bulk respond again. You can move this back to retrieving, e.g., or you can choose the response. So you can use that book strap that you printed and.

### **Timestamp (OCLC)**

25:15

You Scan the request ID barcode or you can select the request from here and choose the response yes, can supply, Print the shipping labels. If automation didn't apply the constant data so we select manually and submit the response. So all the requests move into the status in transit and the.

### **Timestamp (OCLC)**

25:44

The shipping labels are in your print queue and you can go to a print queue, lending, shipping labels, you can select those. Selected the start label position.

### **Timestamp (OCLC)**

26:04

If you are reusing the paper, you can select the different position here. Select what include, what you need to include on the shipping label, print, and then.

### **Timestamp (OCLC)**

26:20

Ship the the items to the borrowers, and under print queue you see the print all. This option is when you want to print several requests under.

### **Timestamp (OCLC)**

26:37

One queue under one category. So if you wanted to print all the requests under one category, you can like everything that's new in loans, requests, you can select from here, print all, continue.

### **Timestamp (OCLC)**

26:52

And then print it, you can move them to considering if you want to or you can uncheck this and just print those requests. I see your question here. Let me check your question.

**Timestamp (OCLC)**

27:28

So, if you have circulations, the question here is that his library have to manually place the holds in the ILS and wait for the members libraries to send an item.

**Timestamp (OCLC)**

27:44

To themselves to fill that request with that item is the question is if with circulation integration, they need to do that manually as well. So with circulation integration.

**Timestamp (OCLC)**

28:00

If you, if your library has fulfillment integration which is different of circulation integration, you don't need to repeat the process. If you have to do circulation, if you have circulation integration only, not to fulfillment integration.

**Timestamp (OCLC)**

28:20

With your ILS, then when you do the process the process of circulation integration works when you mark that item as received. That's when circulation integration is triggered.

**Timestamp (OCLC)**

28:37

So, once you mark that you receive that item as a borrowing library, you mark that item as received or as a lending library when you mark that request as yes we you are supplying that's when circulation integration is triggered.

### **Timestamp (OCLC)**

28:57

anything you do before, yeah, it's not affecting. It just affects the moment you either respond yes as a lending library or you respond mark as received as a borrowing library, ok? I will.

### **Timestamp (OCLC)**

29:19

You will take a note of your question and I will send you a more comprehensive answer in separate my email message, ok?

### **Timestamp (OCLC)**

29:34

So now your request is under here lending priorities shipped in transit. So these are the requests here. You can see them here, you can see that when you sent those items to the libraries. You can manage even though this depends on the.

### **Timestamp (OCLC)**

29:54

Borrowing library to update the request you can still see what's happening to the request. And then when the borrowing library sends you that item back, then you can see your request here on the returned in transit.

### **Timestamp (OCLC)**

30:11

And then you can open that request and complete checking, complete that request and close that request, ok? You can do the you need to do this even if you have circulation integration, you need to complete the request. If you haven't received.

### **Timestamp (OCLC)**

30:31

You can mark as not returned and communicate with the other library to solve this situation and your request will be here under returned but missing. It'll be a category here queue a separate queue for that request and you can complete this. And when you complete this then this request is NO longer

### **Timestamp (OCLC)**

30:53

in your queues.

### **Timestamp (OCLC)**

30:57

And you can complete in batch as well, when you see here returned, you can use the bulk respond option and select several requests to mark as complete. So you don't need to do this manually.

### **Timestamp (OCLC)**

31:14

One by one, I mean. Now an example of copy requests on your lending priorities. So a copy request.

### **Timestamp (OCLC)**

31:30

You can use for copy requests you can use article exchange to respond to supply this item, and you can see the article exchange option here on the body of the request. If you have a knowledge base worldcat knowledge base.

### **Timestamp (OCLC)**

31:51

Integrated in the system, you would see the links here for your databases, your collections related to this item for you to easily access that and prepare that file to send through article exchange.

### **Timestamp (OCLC)**

32:08

You'll see here on the right when you have your, you need to have your electronic collections in the Worldcat knowledge base and then from the service configuration through that link that for that integration for you to see represented here. So using.

### **Timestamp (OCLC)**

32:28

Article exchange, you choose the, if you don't choose the language for OCR, English should be automatically applied if the system does not identify the language on the document because the OCR.

### **Timestamp (OCLC)**

32:45

Automatically identifies the language on the document. So you can select manually select the language, choose the file, and I.

### **Timestamp (OCLC)**

33:05

Exchange creates this unique UL and password you can preview this using this eye icon and if the document is not the correct one, you can unload this process and repeat the process and choose the correct file.

### **Timestamp (OCLC)**

33:28

Yeah, in you can add tags. It's the same thing as the borrowing library, the landing library can group the requests using tags as well. Tags are very useful e.g. when you need to communicate with other staff in your library, so you can add.

### **Timestamp (OCLC)**

33:52

The name of that person as a tag or you can group this by the type of patron or you can group these by request with costs e.g. with invoice that you need to invoice the borrowing library. So you can have this here because tags can be searched.

### **Timestamp (OCLC)**

34:12

From the homepage you can from the homepage you can search for your tags here. You can manage all your tags. You can search for your tags like e.g. I have one request under this name and this person can just look for their name and then find all the requests that are assigned to that person.

### **Timestamp (OCLC)**

34:35

So it helps a lot in this process. So after you have supplied the item, then you can mark yes, you don't need to print the bookstraps unless your library has this option for copy requests, then you mark as yes. When you mark as yes, the.

**Timestamp (OCLC)**

34:55

The borrowing library receives this information and if the borrowing library has enabled, to be sent directly to their pedrons, then their pedron will receive this information directly on their account, ok? So you can mark this as yes, and this.

**Timestamp (OCLC)**

35:18

This request goes to the boring library or the. So, the batch processing here, if you're not using the advanced landing workflows, you can still find the.

**Timestamp (OCLC)**

35:40

The process for batch processing from me can you supply? You'll be here that that bulk respond if you're not using retrieving and packaging, e.g.. And you can use that that option to the landing workflows for copy requests.

**Timestamp (OCLC)**

36:01

As well.

**Timestamp (OCLC)**

36:05

Now let's see an example here from your priority queues how to respond NO to a request like e.g. this item here is a an item that does not circulate outside of your library and we highly recommend that you have.

**Timestamp (OCLC)**

36:25

Deflection policies to avoid this process of manually responding NO to requested don't circulate outside of your library. So here you have the option to respond NO.

### **Timestamp (OCLC)**

36:38

And these are the reasons. You don't need to give a reason, but it's useful to do that because this information populates on your reports and then you can identify those items that or those situations or type of formats.

### **Timestamp (OCLC)**

36:56

Where you need to create deflection policies. So for this example, these are the options. For this example, I will select non circulating. You can only select one reason for responding no

### **Timestamp (OCLC)**

37:16

To the request. So that request is NO longer in your supply queue, the request moved to the next lender in the lender string. You can respond conditional too. So let's open this request here.

### **Timestamp (OCLC)**

37:34

Like conditional means that you cannot supply that item unless the borrower accepts your conditions. It could be costs involved or you need more information or you cannot supply the entire material.

### **Timestamp (OCLC)**

37:52

Things of these types and you can choose a conditional for that. So here under conditional, this is a request for musical scores and you cannot supply the entire item, but you can supply.

### **Timestamp (OCLC)**

38:11

Some page. So the conditional, so here are the options, you can select one option only. So cannot land copy which page, but you can use this.

### **Timestamp (OCLC)**

38:27

Option here where you see, the field, you can customize this, you can customize this, you can enter additional information here as well and then send.

### **Timestamp (OCLC)**

38:47

Your response. When you respond to conditional, your request is NO longer in your queue. The request is with the borrowing library and the borrowing library has four days to respond. If they do not respond.

### **Timestamp (OCLC)**

39:05

Or if they do not accept your conditions, the request moves to the next lender in the lender string, you do not see that request again. You only see that request again if the library accepts your.

### **Timestamp (OCLC)**

39:21

conditions. So when they accept your conditions, you'll see here conditions accepted and you can open the request and you see that the borrowing library has updated the request. You check to see.

### **Timestamp (OCLC)**

39:41

If they have updated, so see they updated the chapters they want. And because this is a request for the physical item, it's a loan request and you are supplying copies of pages and.

### **Timestamp (OCLC)**

40:01

Chapters, then you change the request to copy and use article exchange to supply those pages or chapters in this case, ok? This is a situation where you can change the type of request.

### **Timestamp (OCLC)**

40:19

But it's the only situation where you see the conditional, when the borrowing library accepts it. And one thing about the conditional, when they accept your conditions, your days to respond resets. So this request is reset to your days to respond.

### **Timestamp (OCLC)**

40:39

It's like a brand new request in your queue and another option you have here either in in the your regular can you supply or lending priorities is to recall an item. So.

### **Timestamp (OCLC)**

41:01

E.g., you shipped an item and you made a mistake, you need that item right away or you shipped the wrong material, you can recall, see you have the option to recall the item, the borrowing library has to return that item immediately regardless of the due date.

### **Timestamp (OCLC)**

41:25

And then when you recall the item your request will be under the recall queue until you receive that item back. And you can communicate to, here your record.

### **Timestamp (OCLC)**

41:40

And you can communicate with the borrowing library. You have that option here inside the request on the upper right side of the screen you have the option to email the borrowing library to work on the solution to receive this item back.

### **Timestamp (OCLC)**

42:03

So this is for your lending priorities queues. The regular Can you supply queue works in a very similar way. So the only difference is that they are in a different queue. So your landing requests, then you see your regular can you supply queue with your.

### **Timestamp (OCLC)**

42:23

Copies and loans. So everything is listed here. It's, it's very similar. So e.g. you have a copy request, you have a request here and you respond in a in a very similar way.

### **Timestamp (OCLC)**

42:44

as the priorities queues. The only difference is that they are in separate queues. So you want to supply this, you can use article exchange. Select the item, the file, then.

### **Timestamp (OCLC)**

43:08

Article Exchange creates this unique URL and password, you respond yes, and this request this information goes to the borrowing library or directly to their patron.

### **Timestamp (OCLC)**

43:24

And one thing I have to show you here, let me go to the service configuration, not this. So here under service configuration.

### **Timestamp (OCLC)**

43:45

Under world share LL and automated request manager, so every request that comes to your Can You supply queue either the regular ones or lending priorities, the system is looking into your deflection policies.

### **Timestamp (OCLC)**

44:12

Your supplier status, your knowledge base, your group affiliations, your time to respond, your real time availability for pack integration, and your lending priorities queues to automatically take action on that. So you only receive the request that you are ready to.

### **Timestamp (OCLC)**

44:37

Answer and then according to your automations, the system applies the constant data for you as well. So everything's basically automated when you see the request there, if you do not have deflection policies to set the.

### **Timestamp (OCLC)**

44:57

The format the request will be there in your Can You supply. Once you create the deflection policies, those requests will NO longer be in your Okina supply because the system is automatically deflect deflecting those requests.

### **Timestamp (OCLC)**

45:13

So do you have any questions? Any other questions? While you thinking about I have a couple of questions for you. Let me see if you can open.

### **Timestamp (OCLC)**

45:42

This circulation integration checks all outgoing items out to a single temporary location ILS regardless of a borrower identity, can it be configured to check items out, out to borrower specific accounts with.

### **Timestamp (OCLC)**

46:04

Which are managing the ILS. If you want that to happen, circulation, when you configure circulation integration as a lender, you have the option to create a specific account for that process. So when you're working with your OCLC implementation manager, you, you have to communicate with them how you want that account to be created. And they will help you on that process. You can create.

**Timestamp (OCLC)**

46:34

Create a specific account for that so then you can have that specific type of account for, for this situation, ok? Manage in your ILS. Otherwise you would go just in a temporary.

**Timestamp (OCLC)**

46:55

location regardless of identity. Let me see if I can open Slido here.

**Timestamp (OCLC)**

47:12

So the 1st question select the correct statement. Which statement do you think is the correct one? This is to help to see if you have understood the concepts so far.

**Timestamp (OCLC)**

47:37

You need to accept the question and thanks for participating on the poll, on the quiz, by the way Let's check the.

**Timestamp (OCLC)**

48:05

Correct answer. The correct answer is number two. Lending priorities queue is for copy and loan. The other options are incorrect. You can print multiple requests for bookstraps.

**Timestamp (OCLC)**

48:21

The batch processing for advanced workflows as I showed you, and the article exchange is for copy request. You can batch processing advanced workflows using the bulk respond button when you open that.

**Timestamp (OCLC)**

48:41

Thank you ok? Thanks for participating and do 2nd 1 s question, which one is not advanced workflows option?

**Timestamp (OCLC)**

49:18

Thanks for participating again. Let let's see if you got this correct. Printing is not advanced workflows option. The the options are retrieving.

**Timestamp (OCLC)**

49:33

Scanning, verifying can can be there as well. The verifying is scanning, retrieving and packaging. Okay, these are the fourths. Printing is not advanced workflows option. Printing is an option that's there in printing options on the.

**Timestamp (OCLC)**

49:53

Upper right side screen available for you to use all the time. You don't need to configure that to be available there. You can customize your printing options, but the advanced workflows options are verifying, retrieving.

**Timestamp (OCLC)**

50:12

Is scanning and packaging, ok? Thanks for participating again. Now let's.

### **Timestamp (OCLC)**

50:32

Briefly talk about off system requesting. This option is for your library, either as borrowing or landing library to do ILL with your partners that do not use OCLC inter library loan service. The benefit of this option is that.

### **Timestamp (OCLC)**

50:52

That you have the available availability, you have the ability sorry you have the ability of using some of the service functionalities that have all your ILL in one place to manage them from and then have a.

### **Timestamp (OCLC)**

51:12

Them reflected on your reports. So you can, you can use some of the service functionalities with partners that do not use OCLC interlibrary loan. As a borrower, you can bring your ILL requests with landing libraries not using OCLC interlibrary loan service.

### **Timestamp (OCLC)**

51:35

And as a lender, you can bring your ILL request with borrowing libraries not using interlibrary loan service into the system in OCLC system. The 1st step is to add your partner to the system in OCLC service configuration under ILL address book, then you add the partner, complete that form, then save it.

### **Timestamp (OCLC)**

52:05

To be able to apply your partners to the request. WMS libraries can share partners, you can share partners. As lender, once you add your partner to the system.

### **Timestamp (OCLC)**

52:24

Then you can enable your partner to use the lenders off system request form to initiate their ILL request so they can use a form to initiate the ILL request. You need to enable this form from the service configuration under world share ILL.

### **Timestamp (OCLC)**

52:44

And request forms, you select the option there enable it and then you can customize that form as well and save it. Then from Tipasa interface you you can use the admin tab to create the user account because your partner needs.

### **Timestamp (OCLC)**

53:05

User account to access the form and you send that those credentials and the link to the form to your partner. And you need to link that user account to your partner.

### **Timestamp (OCLC)**

53:22

Record in the system as well. So I put a link to the documentation page for this part if you are interested in enabling this for your partners. Then, a staff at your library can create off system.

### **Timestamp (OCLC)**

53:42

request as well from the off system requests queue that you find in your instance, then you have the button to create a lending request. You can apply the information, select your partner there for the system to populate. And after that you.

### **Timestamp (OCLC)**

54:04

You can manage the request, you can manually change the the status of that request and for copy request you can use article Exchange to supply that file to your partner and you can communicate with your partner through email as well. Mainly if you are manually creating, the staff is manually creating that request.

### **Timestamp (OCLC)**

54:29

And if you have circulation integration configured for your library, this integration works for off system requesting as well. Let's talk about the reports when subscribing.

### **Timestamp (OCLC)**

54:50

So Tipasa, your library receives a nine digital authorization and password. If you don't have that to contact support to get your credentials. So let's check some available reports as lender. Let me share my browser here. The easiest way to access your reports is from your Tipasa home page.

### **Timestamp (OCLC)**

55:21

Under quick links usage statistics, then you enter the nine digit authorization and the password. These are the classic reports.

### **Timestamp (OCLC)**

55:37

So you have some reports available here. Let's start with the resource sharing lender reasons for NO report.

### **Timestamp (OCLC)**

56:05

This is a monthly report that provides details why your library has responded a note to the request. That's why I said it's important for you to select an option. So when you see, e.g., a lot of requests unfilled, non circulating.

### **Timestamp (OCLC)**

56:27

You needed to create deflection policies for, for those types of materials or those types of libraries. Lacking means that you need more information the library forgot to complete the.

### **Timestamp (OCLC)**

56:44

Article request and you couldn't find that so you responded NO? You could, you could have responded a conditional and asked for more information but you decided to respond to NO. So you see here as lacking.

### **Timestamp (OCLC)**

57:00

And if you have deflection policies, you would see here deflected according to your rules and if you if he was deflected by real time availability not available in your library, you would see here the system checked

### **Timestamp (OCLC)**

57:19

Availability. You can change the month here and update this and you see all the information about the those items.

**Timestamp (OCLC)**

57:36

Another report that you see available here is, the lender resource sharing stats report. This is a monthly based report as well, but this one provides full

**Timestamp (OCLC)**

57:58

Details of your request. Let me find one. This is monthly so if you don't have anything in a month it will be empty. Oh, I don't have anything here. Let me see. I have another account.

**Timestamp (OCLC)**

58:16

But this is the is the request. Let me see if I find another one here let me see if I can connect to the other.

**Timestamp (OCLC)**

58:32

account. Okay.

**Timestamp (OCLC)**

58:58

Just for you to see the.

### **Timestamp (OCLC)**

59:16

The report. So Lender resource sharing status report. So this is a report where you see all the information all the details about the request, the borrower, the title.

### **Timestamp (OCLC)**

59:35

If there's costs involved, and if you have off system, you would see that information here as well, it was sent through automation.

### **Timestamp (OCLC)**

59:55

How many times that item was requested before, as well. This is a type of report where you can check where most of your requests come from and the most circulated titles in ILL. If you borrow too, use this report

### **Timestamp (OCLC)**

1:00:16

to compare your ILL activities as a borrower and lender for collection development purpose, so you can compare both. And the lender, the lender activity overview report, this is a type of report that provides information.

### **Timestamp (OCLC)**

1:00:40

About your ILL activities. It can be for up to 60 months and you can see here your peak of ILL. So the most you have more ILL and you can see as how you are responding to requests or not responding to requests, your average turnaround.

### **Timestamp (OCLC)**

1:01:06

Time as well.

### **Timestamp (OCLC)**

1:01:10

The number of requests you didn't did not fill, this is a report for you to check how you are responding to requests and how long you're taking to respond to request and your peak.

### **Timestamp (OCLC)**

1:01:26

All reports can be exported or emailed to yourself or a list of email addresses, so you don't need to manually generate this request on monthly basis. You can just enter your email address here and when you.

### **Timestamp (OCLC)**

1:01:46

Check this in monthly select the format and the style, save it, the system will email you your reports when you have reports available for that month, ok?

### **Timestamp (OCLC)**

1:02:02

Let me go back to that other to the. So now you have also the option to customize reports in analytics.

### **Timestamp (OCLC)**

1:02:20

This is e.g. like e.g. when you have that resource sharing lender reasons for NO or lender resource sharing stats, they are monthly reports but you want to generate a.

### **Timestamp (OCLC)**

1:02:36

A report for several months, or you want to compare some information. You can customize your report as a lender. So as under analytics reports, classic launchpad.

### **Timestamp (OCLC)**

1:02:53

So e.g., I want to generate a report on items I have supplied to libraries during this year. I go back to home.

### **Timestamp (OCLC)**

1:03:11

And I select applications, Web intelligence.

### **Timestamp (OCLC)**

1:03:31

And now I'll be able to select my options for my report. So universe has to be inter library loan, I'll select the object. The result objects are the columns.

### **Timestamp (OCLC)**

1:03:58

In my spreadsheet for my report, so I can start like e.g. with borrowing institution. So I want the name I can double click.

### **Timestamp (OCLC)**

1:04:14

Symbol or I can just click and use the arrow, the symbol, then on the request detail, I want the OCLC request ID, you have other options here as well.

### **Timestamp (OCLC)**

1:04:33

The request item, I want the, the ISBN, ISSN, the title and the.

### **Timestamp (OCLC)**

1:04:53

Oh, ah here then as filter, you can select as many options you want here for your report, for your columns, and then you select your filter. So now for the filter, I want the date to this year. So I go, the assigned date.

### **Timestamp (OCLC)**

1:05:13

So if you place the cursor on the top of the option, you can see what that option is for. So you see this, this option so I can drag it to the filter.

### **Timestamp (OCLC)**

1:05:28

And I wanted this to be equal to 2026, the current year. And now I can run my report.

### **Timestamp (OCLC)**

1:05:48

To generate my report. This report I'll be able to save or export to a PDF or Excel format e.g. and share that type of reports with other staff in the library. So this is my report, you see those objects, they become my columns.

**Timestamp (OCLC)**

1:06:19

So I have other options here too. I can insert tables or charts and any other information. Analyze it. I can save these and I can export this as well, or print.

**Timestamp (OCLC)**

1:06:37

I can export these other options for exporting, where I can export for Excel, e.g..

**Timestamp (OCLC)**

1:06:57

Let's see if I can open that. Just to show you.

**Timestamp (OCLC)**

1:07:17

So the.

**Timestamp (OCLC)**

1:07:39

Okay let me find that file.

**Timestamp (OCLC)**

1:07:56

I can export that and work in Excel where I have more resources to work that report I can export in other formats as well.

**Timestamp (OCLC)**

1:08:12

CSV or PDF, what is relevant for me? So you got the, the idea of how it works.

**Timestamp (OCLC)**

1:08:32

So you have several types of reports available and I put in here on the copy of the presentation, I put here the link for a tutorial video for custom Tipasa reports and the documentation for the reports in general for you to understand.

**Timestamp (OCLC)**

1:08:57

So during this session, you have learned about lending priorities queues in Tipasa, and how to use them. You have learned about the advanced landing workflows, again, verifying.

**Timestamp (OCLC)**

1:09:16

Retrieving the scanning and packaging, how to use them, and you have learned how to respond to loan and copy requests using either your regular can you supply queue or the landing priorities queues, including printing.

**Timestamp (OCLC)**

1:09:36

And batch processing options. Then how to generate statistical reports. You can try this interactive guided tool is like a type of simulation and you can try this at your own pace where you will be able to choose when there are several staff members at your

**Timestamp (OCLC)**

1:09:59

Library and use advanced workflows or when it's only you. I'm I'm adding this to the chat. Let me get, let me get that link.

**Timestamp (OCLC)**

1:10:16

Put it here in the chat so you can. You can try that and at your own pace.

**Timestamp (OCLC)**

1:10:56

Very good, this is the link to this interactive guided tool. This helps you to understand the concepts better.

**Timestamp (OCLC)**

1:14:04

Oh, sorry for that, Webex just closed unexpectedly so thanks again for participating.

**Timestamp (OCLC)**

1:14:22

And enjoy the rest of your day.