Proven Senders

Find details about setting up proven senders in Tipasa. Proven senders allow borrowing libraries to have requests from individual lenders, who have proven to provide quality documents, to automatically be received for the borrower. The Proven Senders feature allows borrowing libraries to designate individual lenders as proven senders. Proven senders are lenders who provide good quality documents (e.g., good scans, fast turnaround time). When the lenders you designate as proven senders respond to a copy request with an Article Exchange document, the request is automatically received for the borrower. Proven Senders can be combined with automations in order for patrons to receive copies as soon as the lenders scan and send them. See Automated Request Manager for more information.

How proven senders works

The following image provides an overview of the proven senders workflow:

Notes for borrowing libraries

In order for the Proven Senders feature to be applied, the following must be true:

- The request must be a Copy request.
- The lender string must include one of the lenders designated as a proven sender.
- The request must be linked to a patron, so the filled request appears to the patron via a link in My Account. If you have turned on patron approval, the patron linked to the request must be approved. See Patron management for more information.
- If your library uses IFM, confirm the values set for IFM and Max Cost in the request before submitting it to lenders.
Proven senders works for IFM and non-IFM requests.

**After a request is fulfilled**

Once all criteria have been met, the system marks the request as Received for the borrowing library. Then, the request is quickly updated to Closed and the following occurs:

- The patron will receive an SMS and/or email with the Article Exchange link if an automated notification for Article available in Article Exchange is enabled. See Notifications for more information.
- The Article Exchange link will be available to the patron in My Account.

Since the filled request is Closed by the system, it will not appear in any queues. The borrower can find it by searching Closed requests, and the Article Exchange link will display in the request for the borrower to preview or manually email if needed. Additionally, the Supplier History section of the Request History accordion shows that the request was filled by a proven sender.

**Set up proven senders**

You must first turn on Proven Senders in OCLC Service Configuration before requests from any of the lenders you designate as proven senders will be automatically Received. Turning on Proven Senders does not affect any requests that are already in the In Transit queue.

**Step 1: Create a custom holdings group for proven senders**

Any existing custom holdings group can be used, but OCLC recommends creating a new custom holdings group for proven senders. If you already have a custom holdings group you want to use, you can skip this step.

To create a custom holdings group for proven senders:

1. Sign in to Service Configuration.
2. On the left navigation, click **WorldShare ILL > Custom Holdings Groups**.
3. On the Configure Custom Holdings Groups screen, select **Create New Custom Holdings Group**.
4. In the Custom Holdings Group Name field, enter a name for the custom holdings group.
5. Optional. Enter a description of the group.
6. Click **Add/Edit symbol(s)**.
7. In the Add/Edit OCLC symbols window, add the symbols of the proven senders in the box provided. Separate multiple symbols with a space.
8. Click **Update Symbols**.
9. Click **Save**.

**Step 2: Configure proven senders**

Once you have created or found the custom holdings group you want to use for your proven senders, you can enable
the feature.

To turn on proven senders:

1. In Service Configuration, on the left navigation, click WorldShare ILL > Advanced Workflows.
2. Under Proven Senders, select the On check box.
3. From the Custom Holdings Group list, select the group of proven senders.
   ◦ Note: If you decide to turn off proven senders, the custom holdings group you select here will be maintained for future use.
4. Click Save.
5. Copy requests fulfilled by the symbols in the custom holdings group you selected will begin to be automatically received.

Proven senders assignment

Once you have completed the above and designated a group as proven senders, the custom holdings group you used will be given the Group Assignment of Proven Senders. This assignment displays when you view the custom holdings group on the Custom Holdings Groups screen in Service Configuration by group or by symbol. The assignment provides a quick way to determine how the group is being used.
Configure Custom Holdings Groups

Required fields are marked with an asterisk *

Display groups:

by group name

Custom Holdings Groups

PROVENSENDERGROUP

* Custom Holdings Groups Name: PROVENSENDERGROUP
Description: Used for automation testing of Proven Senders

This group assigned as: Proven Senders

OCLC Symbol(s)
Symbols currently in the group: 2

- [ ] NDCLV
- [X] ND CLIVE PUB LIBR 123
- [ ] NDOAG
- [X] ND OAG
Make changes to proven senders

You can edit the custom holdings group you designated as proven senders or turn off the setting at any time, but keep the following in mind:

- If Proven Senders is turned on, adding symbols to the custom holdings group means that copy requests fulfilled by the lenders of those symbols via Article Exchange will be automatically received. Conversely, if you remove symbols from the custom holdings groups, effective immediately, copy requests fulfilled by those lenders via Article Exchange will not be received automatically.
- If Proven Senders is turned off, the functionality immediately turns off. Once the Advanced Workflows screen in Service Configuration is saved, requests fulfilled by the lenders in the custom holdings group you designated as
proven senders will not be automatically received.