Prepare and plan
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Find information about steps you can take to prepare for your use of Tipasa.

Browser compatibility

Use the browser compatibility chart to ensure your systems are up to date and can support Tipasa.

OCLC Policies Directory

Add or update your records in the OCLC Policies Directory. Some key areas to review include Contacts and Policies for copy, loan and deflections. For more information, see OCLC Policies Directory.

Once logged in, on the home screen under Quick Links, click OCLC Policies Directory.

Watch a video

Establishing Policies in OCLC Policies Directory- Part 1 (7:30)
In this video Borrowing and Lending libraries will learn how to set up and/or edit their policies in OCLC Policies Directory using the Profile, Collections, Schedule, and Contacts tabs.

Watch a video

In this video Lending libraries will learn how to set up and/or edit policies for deflections, loans, and copies on the Policies Tab in OCLC Policies Directory.
Learn more in a training course: Introduction to WorldShare ILL

OCLC Service Configuration

Administrative settings for WorldShare Interlibrary Loan are maintained in OCLC Service Configuration. On the home screen, under Quick Links, click OCLC Service Configuration to go to Service Configuration. For more information on these settings, see OCLC Service Configuration settings.

Turnaround Time

Monitor your turnaround time using the Turnaround Time dashboard on the Tipasa homepage.

Message Board

Below the Quick Links, you will find the Message Board. This space is updated regularly by OCLC staff with information about scheduled system maintenance, training opportunities, ILL-related webinars, and other information about the ILL system.

Constant Data

Administrative settings for WorldShare Interlibrary Loan, such as constant data, are maintained in OCLC Service Configuration. Make sure to add your constant data in the WorldShare ILL module under Borrower Data and Lender Data. See Constant data, Borrower Data, and Lender Data for more information.

Document Delivery

If your patrons place ILL requests for items your library owns, those requests can be automatically routed to a Document Delivery queue using automations in the Automated Request Manager. Once there, you can fill them with items from your own collection or choose to use this as an opportunity to educate patrons on how to search your collection more effectively. See Document Delivery for more information.

Additional Tipasa workflows

If you receive many article or book chapter requests from your patrons, consider setting up Proven Senders in combination with automations via the Automated Request Manager. This workflow can allow some of your copy requests to clear copyright, go out to lenders unmediated, be filled quickly, and notify your patrons automatically.