Notifications

Tipasa offers the ability for libraries to send automated notifications to patrons at various events in the request life span, and also the option to send notices about a specific request at any time while using the staff user interface. Automated notifications to patrons will be sent via email and/or Short Message Service (SMS), depending on the patron's preferences.

A total of 28 event-specific notifications are available in OCLC Service Configuration which can be customized by your library to include your ILL name, department email address, and contact information. In addition to customizing the event-specific "standard" notifications, your library can create as many as 50 "custom" notifications, all of which can be emailed to the desired recipient using the staff user interface.

Notes:

• By default, patrons will receive email messages.
• Text message notifications are turned off by default. To enable the ability to send SMS notifications for patrons, turn on **Send SMS for Notifications**.
  ◦ It is recommended that libraries outside the United States and Canada do not enable SMS notifications.
  ◦ Add the **Phone** field to your Patron Request Workforms to allow patrons to receive SMS notifications for their requests. See **Patron Request Workform fields** for more information.

Set up Notifications

Notifications are set up in OCLC Service Configuration. By default, no notifications are turned on. There are 28 event-specific notifications you can configure, in addition to 50 custom notifications.

You can turn SMS notifications off or on by checking the **Send SMS for automated notifications** box. Patrons will need to opt into SMS notifications in **My Account**.

Note: It is recommended that libraries outside the United States and Canada do not enable SMS notifications.

You can select notifications to appear in the Tipasa interface for manual sending and/or for them to be automatically sent out when an action occurs within the system. Not all notifications allow for automated sending. For a description of all notifications and when automated notifications are sent out, see **Notification types**. Notifications can be sent to patrons as email and/or SMS messages, depending on what they have selected in **My Account**.

https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/120Notifications

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Decide which notifications you want to set up

You should review the Notification types and decide which notifications you want to enable before configuring the notifications. You will have to customize each notification with your library's information. There is no way to batch edit notifications.

Libraries using WorldShare Circulation should work with their circulation department to evaluate the library's circulation notification policy and determine whether to use notifications from WorldShare Circulation or from Tipasa. This will prevent patrons from receiving multiple notifications for items about to be due, overdue or available for pickup.

Configure notifications

Once you have decided on the notifications your library will use, you can begin customizing each notification.

To set up notifications:

1. Sign in to Service Configuration.
2. On the left navigation, click WorldShare ILL > Notifications.
3. On the Notifications screen, for every notification you want to turn on:
   a. In the row of the notification, click Edit.
   b. Fill in the fields with your library's information. You should customize your notifications in order for your patrons to recognize the notification is coming from your library. See Edit email and SMS notifications for details.
   c. Click Save All Changes.
   d. A confirmation message appears. Click Click to edit if you want to make any additional changes.
4. Optional. To preview the email and SMS notification, click **Preview** in the row of the notification you want to preview.

5. Optional. To test the email or SMS notification:
   a. Click **Send Test Email** or **Send Test SMS** in the row of the notification you want to test.
   b. Enter the **Recipient Email** or **Recipient Phone Number**, respectively.
   c. Click **Send**.

6. For every notification you want to turn on, select the **Manual sending in WorldShare** check box and/or the **Automated** check box.

7. At the bottom of the screen, click **Save**.

**Notification History**

All notifications for a request are tracked in a Notification Log.

**To view the Notification Log:**

1. Locate the request you need to review in the Borrowing Requests queue.
2. Click on the request ID or Title.
3. Expand the Request History accordion.
   **Note:** It may take several minutes for the Notification Log to update after a notification is sent.