Create a Tipasa account

Find information about creating staff accounts, as well as searching for, editing, and deleting accounts in Tipasa.

Create users

Create accounts for your staff members. Required fields may vary, depending on the services your library subscribes to.

Note: This feature is not supported for libraries using third-party authentication. Libraries using LDAP, SAML/Shibboleth, CAS or another third-party provider must perform ongoing patron loads in order to add new accounts to Tipasa.

Recommendations

- Follow the account naming conventions used by your institution when creating user names.
- If you are creating accounts for your staff members, make sure you tell them their user name soon after you create the account. They will need their user name to create a password.
- Create an account for each employee accessing the system. Staff should not share accounts.
- Do not re-use staff accounts.
- Delete accounts for staff who are no longer with your institution.

For information about creating patron accounts, please see Create patron accounts.

Create a staff account

1. On the left navigation, under User Management, click New User.
2. On the Basic User Data panel, OCLC recommends filling in the following fields:
   - **First Name:** Highly recommended.
   - **Address, Phone Number, or Email Address:** Email is highly recommended. The user/patron needs an email address to create a password for their account.
   - **User Name:** Required. Depending on your institution's configuration, Barcode and User Name may be linked. If you are not using WorldShare Circulation, the User Name field is recommended.
     - **Barcode** is only used for libraries using WorldShare Circulation.

The following fields are required for libraries using WMS Circulation functionality only. Tipasa-only libraries should not include information in any of these fields:

   - **Barcode**
   - **Patron Type**
   - **Home Branch**
3. Click **Create**.
4. On the confirmation window, click **OK**. The user/patron account appears.

**Assign roles to a staff account**

1. In the user account, expand the **Roles** accordion.
2. Within the Roles accordion, click **Edit** (on the far right).
3. Select the appropriate roles.
   - For more information on the actions users can perform with individual roles, see [Roles](https://help.oclc.org/Resource_Sharing/Tipasa/Get_started/Create_an_account).
   - All accounts must have the Everyone role assigned. The Everyone role is included automatically and should not be removed
4. Click **Save**.

**Prompt your staff member to set a password**

1. For the account you just created, perform one of the following actions so your staff member can create a password:
   a. Click **Set/reset** in the Identity Management section if available, or
   b. Direct your staff to:
      1. Go to your library's WorldShare URL. Replace **yourlibrary** with your library's identifier: `https://yourlibrary.share.worldcat.org/wms`
      2. Click **Set/reset password** on the Sign In screen.
2. Either action will send a system-generated message to the email address in the account. Please note:
   - Your staff member must follow the link in the system-generated email within 24 hours to set a password. They should check their junk folder if they do not see the email within a few minutes
   - If the link expires, you can perform either of the above steps to prompt your staff member again

Note: Send your staff member their user name. Your staff member needs this information to create a password.

**Tipasa account roles**

- WORLDSHARE_ILL_ADMIN
- WORLDSHARE_ILL_USER

**Tipasa roles comparison**

[https://help.oclc.org/Resource_Sharing/Tipasa/Get_started/Create_an_account](https://help.oclc.org/Resource_Sharing/Tipasa/Get_started/Create_an_account)
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign roles to other users. Create a user that automatically has the</td>
<td></td>
</tr>
<tr>
<td>Everyone role assigned.</td>
<td>x</td>
</tr>
<tr>
<td>Can use OCLC Service Configuration.</td>
<td>x</td>
</tr>
<tr>
<td>Create users, regardless of module (Circ, Acq, etc.)</td>
<td>x</td>
</tr>
<tr>
<td>Delete users.</td>
<td>x</td>
</tr>
<tr>
<td>Perform all operations, including assigning roles to users.</td>
<td>x</td>
</tr>
<tr>
<td>Read information about users, regardless of module (Circ, Acq, etc.)</td>
<td>x</td>
</tr>
<tr>
<td>Retrieve and view users.</td>
<td>x</td>
</tr>
<tr>
<td>The security context contains all the information about a given user</td>
<td></td>
</tr>
<tr>
<td>(especially what actions they can perform). This permission allows the</td>
<td></td>
</tr>
<tr>
<td>user to perform actions on behalf of another user (patron).</td>
<td>x</td>
</tr>
<tr>
<td>Update information about other users, regardless of module (Circ,</td>
<td></td>
</tr>
<tr>
<td>Acq, etc.)</td>
<td>x</td>
</tr>
<tr>
<td>Update institution configuration information relating to authentication</td>
<td></td>
</tr>
<tr>
<td>and authorization.</td>
<td>x</td>
</tr>
<tr>
<td>Use the Forgot Password feature to get a new password.</td>
<td>x</td>
</tr>
<tr>
<td>Use of WorldShare ILL.</td>
<td>x</td>
</tr>
<tr>
<td>View copy and item-level holdings for their institution in WorldCat.</td>
<td>x</td>
</tr>
<tr>
<td>View information about a user’s accounts. In some circumstances this</td>
<td></td>
</tr>
<tr>
<td>may include identifying information about accounts external</td>
<td>x</td>
</tr>
</tbody>
</table>
### Search for users

1. On the left navigation, under User Management, select an index from the **Limit search to** list.
2. Enter your search terms. You must enter at least two characters for the search to return results.
3. Click **Search** or press <Enter>.
4. From the search results, click a user name to open the record.

#### Available search indexes - Table

<table>
<thead>
<tr>
<th>LIMIT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Name, ID, Email | Search terms entered for this index returns results based on the following:  
  • Name: Last name, First name, Middle name, or preferred name  
  • ID: Barcode, User ID at Source, ILL Identifier, or PPID  
  • Email Address: Email address located in the Library Record area of the Basic User Data accordion for the user  
  Values searched upon for the name and email address in the **Name, ID, Email** index may generate slightly different results than the individual Name and Email index.  
  • The **Name, ID, Email** index takes a single token from the user input and compares with a left-handed match of a searchable value  
  ◦ Example: 'smith' |
The individual **Name** and **Email** index searches allow multiple tokens to be passed, separated by spaces.

- Example: "smith john"

<table>
<thead>
<tr>
<th>Identifier (default)</th>
<th>The circulation barcode, ILL identifier, User ID at Source, and PPID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Contents of the First Name, Middle Name, or Last Name</td>
</tr>
<tr>
<td>Barcode</td>
<td>Barcode (ID number) of the user</td>
</tr>
<tr>
<td>User ID at Source</td>
<td>The ID of the patron in an external system (e.g. ILS, PeopleSoft, Banner, CAS)</td>
</tr>
<tr>
<td>ILL Identifier</td>
<td>A unique identifier for the user in the Tipasa system. It may be the user's library barcode</td>
</tr>
<tr>
<td>Email Address</td>
<td>Email address of the user</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Phone number of the user</td>
</tr>
<tr>
<td>Street Address</td>
<td>Address of the user (e.g. house number, street name)</td>
</tr>
<tr>
<td>City</td>
<td>City of the user's address</td>
</tr>
<tr>
<td>State/Province</td>
<td>State or province of the user's address</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Postal code (e.g. zip code) of the user's address</td>
</tr>
</tbody>
</table>

Note: This option is only available if you are part of a WMS group.

**Search all institutions in your group**

Deselect the check box to search for users from your institution. When the check box is selected, users across all institutions in your group will be shown.

You cannot edit users that are not from your institution.

### Edit users

1. Search for the user you want to edit.
2. On the search results page, click the user's **Name**.
3. On the accordion of the section you want to edit, click **Edit** (on the far right).
4. Edit information, as appropriate.
5. Click **Save**.

### Delete users

Deleting a user removes their account from the system. This action should be performed with caution. It cannot be undone.

Note: If you are part of a WMS group, you can only delete users from your institution.

If you use WorldShare Circulation, accounts cannot be deleted if the user has:

- Outstanding checkouts
- Outstanding bills
- Been sent to a collection agency

If you try to delete a user account that cannot be deleted, you will receive a message explaining why the user could not be deleted.

1. Search for the user you want to delete.
2. In the user account, click **Delete User Record**.
3. In the Delete User window, click **Delete**.
4. The Delete User Record window appears and the system confirms the deletion.
5. If you use WorldShare Circulation, all outstanding hold requests or item schedules associated with the user account will be removed. Any reference to the user in item statistics will display as 'Unknown Patron.'