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.
   ◦ 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
<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 Everyone role assigned.</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>Can use OCLC Service Configuration.</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>Create users, regardless of module (Circ, Acq, etc.)</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>Delete users.</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>Perform all operations, including assigning roles to users.</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>Read information about users, regardless of module (Circ, Acq, etc.)</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>Retrieve and view users.</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>The security context contains all the information about a given user (especially what actions they can perform). This permission allows the user to perform actions on behalf of another user (patron).</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>Update information about other users, regardless of module (Circ, Acq, etc.)</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>Update institution configuration information relating to authentication and authorization.</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>Use the Forgot Password feature to get a new password.</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>Use of WorldShare ILL.</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>View copy and item-level holdings for their institution in WorldCat.</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
<tr>
<td>View information about a user’s accounts. In some circumstances this may include identifying information about accounts external</td>
<td>WorldShare ILL Admin: x WorldShare ILL User: x</td>
</tr>
</tbody>
</table>
to OCLC (e.g. where OCLC receives periodic patron updates from an external system, or where authentication is managed by an external system).

View and export My Library reports under Analytics > Collection Evaluation.

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, or enter an asterisk (*) to search through all users.
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>
<tbody>
<tr>
<td>Everything (default)</td>
<td>Contents of all fields in the user record</td>
</tr>
<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>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>
<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>Search all institutions in your group</td>
<td>Note: This option is only available if you are part of a WMS group.</td>
</tr>
<tr>
<td>LIMIT</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-----------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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.'