Integration Workflow

Tipasa and WorldShare Circulation integration provides you with a method to streamline the interlibrary loan-circulation process and workflow. Librarians and staff who process ILL loans will no longer have to update WorldShare Circulation manually to create temporary items and patron holds, charge patron ILL fees, check out items that your library is lending, or check-in items at the end of the loan period.

You must set up the integration before following the procedures outlined below. For details on how to set up the integration, see Set up integration.

Note: The integration workflow applies to loan requests, which require circulation of a physical item. Copy requests are handled through Tipasa, with no need to “check out” an electronic, non-returnable item. If enabled, Patron fees can still be assessed for Copy requests.

Integration workflow overview

Staff actions take place across both Tipasa and WorldShare Circulation. System refers to the automatic integration steps done by the system.

Borrowing workflow

1. Patron requests ILL item

The workflow begins when the patron submits an ILL request using the Patron Request Form.

Caution: The Patron Request Form must contain the Patron ID field so patrons are required to enter their patron barcode when submitting a request. The patron barcode is the connection between the ILL Request and the Circulation module.

Library staff can also initiate requests for the patron within Tipasa by providing the patron’s barcode in the ILL Request.

To place an ILL request, the patron will:

1. Locate the item.
2. In the Item Detail view, under Availability / Holdings, click Request Item.
3. On the Patron Request Form, fill in the fields. Required fields are marked with an asterisk (*). The Patron ID (patron barcode) field must be completed in order for the integration to work.
4. Click Submit.
5. Once submitted, the Request ID is returned. The ILL request can be tracked by this number in Tipasa.
Considerations

- Patrons must be authenticated by IP range (on campus or via proxy) to display the Patron Request Form.
- The patron barcode must match a barcode in a patron account in WorldShare Circulation to trigger the integration.

2. ILL staff review request and send to lenders (Tipasa)

Once the request is received in Tipasa, library staff need to review the request and send it to lenders.

To review and send the request:

1. Click the Interlibrary Loan tab.
2. On the left navigation, click Borrowing Requests > New for Review.
3. Click the Request ID or Title to view the request.
4. Verify the patrons’ Circulation barcode is saved in the Patron ID field.
5. Review the request and select the lenders.
6. Click Send Request to send the request.
7. A confirmation message will appear if the request was sent.
8. Click the Request ID in the confirmation message to return to the request.

Note: If you have setup patron fees in the ILL Settings section of the WMS Circulation module in the OCLC Service configuration, patron bills are assessed when the lending library marks a request as Shipped. The fee will appear in the Bills tab of the patron's Circulation record. The Request ID will appear in the Bill note. Please see Enable WorldShare Circulation integration with Tipasa for additional information.

Considerations

- The ILL request will be directed to the New for Review queue or match an automation (if set up). With automation, information in the request is matched against the automation. If the request matches the automation, it is processed based on the Automation Request Manager settings. Some libraries may automatically send out patron-initiated ILL requests to select lenders. See Automated Request Manager.
- Depending on your ILL staff workflow, the ILL request in New for Review may be reviewed (marked as reviewed) prior to being sent. In other words, you may have staff responsible for reviewing and selecting lenders, while a final review and submission is done by another staff member. If your library reviews requests prior to submission, you may want to consider adding patron name and barcode verification to this step.

3. ILL staff receive item from lender (Tipasa)

Once you receive the item from the lender, you need to confirm or enter the item’s barcode in the ILL Request in Tipasa and mark the request as received. The system will use the barcode to create the temporary item, which can be seen in step 4.

To confirm the barcode and mark the item as received:

1. Click the Interlibrary Loan tab.
2. On the left navigation, click Borrowing Requests > In Transit.
3. In the request for the item, enter the temporary barcode in the designated section.
   ◦ If you have determined to use the supplier's shipped item barcode as configured in the Tipasa WMS Integration module of the Service Configuration, this value will automatically populate here. The supplier's shipped item barcode will also appear in the Supplier's Item Barcode field in the request.
   ◦ If you have determined to use the request ID as configured in the Tipasa WMS Integration module of the Service Configuration, this value will automatically populate here.

![Did you receive this item?](image)

Note: The supplier's shipped item barcode can be replaced in the Temporary Barcode field. You may wish to use the Tipasa Request ID as the item's barcode to more easily research the ILL request after it has been closed by the lending library.

4. Click Mark as received.
   1. If you have configured to create a circulation item record on received in the Tipasa WMS Integration module of the Service Configuration, a temporary item will be created with the barcode entered in the Temporary Barcode field. The patron's chosen pickup location also appears in the temporary item so that the item can be routed to the chosen location when it arrives.
      Note: If the patron's chosen pickup location contains an unconfigured location (e.g., Delivery to my address), the pickup location will default to the patron's home branch.

      In the Circulation History, an update shows the temporary item is pending creation. The time to complete the record may vary, but it is generally within seconds.

   2. Click Refresh to reload the Request History.
      3. Upon completion, the Request History status will say “Temporary item record [barcode] successfully created.”

5. After completing these steps, ILL staff should print a book strap, place it on the physical item, and send the physical item to Circulation staff.

Patrons can track the process of the ILL request by checking their account in the User Portal. The On Route status is displayed to the patron as “This item is being sent to [patron’s pickup location].”

Considerations

If you have configured to charge patron on shipped in the Tipasa and WorldShare Circulation integration module of the Service Configuration, fees will be assessed to the patron's account when the item is shipped from the lender.

To configure Fees for ILL items, please see Patron Fees.
If you have enabled WorldShare Circulation and Tipasa integration, do not batch receive loan requests. Each request should be received separately so that an item barcode can be specified for use in WorldShare Circulation.

4. Temporary item is created and hold placed (System)

If you have configured this setting in the Tipasa WMS Integration module of the Service Configuration, after you mark a request as received, the system creates a temporary item and places an item-level hold on the item for the patron. If configured, a notification of the item's availability is sent to the patron. Please see Notifications for more information.

You can confirm that the system created the temporary item by searching for the record in the Circulation module.

To confirm the item was created:

1. Click the Circulation tab.
2. On the left navigation, click Discover Items.
3. From the list under the Enter barcode field, select Temporary Items.
4. Search for the title (or author) of the item that was requested.
5. From the search results, click the item's Title and confirm that the temporary item was created.
6. On the Item Details screen, in the upper right corner of the screen, click Holds.
7. Verify that an item-level hold was placed for the patron.

The Item Details view will include the Request ID and lending library name from the Tipasa request.

Considerations

- The Shelving Location and Holding Location of the item will correspond with the configurations set in the ILL Settings section of the WMS Circulation module in the OCLC Service Configuration.
- The hold is placed and fulfilled at the item's home branch and may need to be routed to the patron's pickup location to trigger the Hold Pickup Notification.

You can also confirm that the hold was created by checking the Holds tab in the patron’s account. The ILL request should appear as an active hold. The request ID will display in the Edit Existing Hold Request dialog box.
5. Circulation staff check in the item (WorldShare Circulation)

Circulation staff receive the physical item from the ILL department and check in the item to trigger a pick-up notification or Hold Receipt when the item arrives at the patron's pickup location.

To check in the item:

1. Click the **Circulation** tab.
2. On the left navigation, click **Check In**.
3. Check in the item, scanning the barcode from the book strap, if provided (the ILL book strap includes a scannable barcode for the Request ID, which is the recommended barcode).
4. Print the **Hold Receipt** that is generated.

After completing these steps, place the physical item and Hold Receipt on the hold shelf for pickup.

As a result, the patron's hold request is updated in:

- The patron’s account in WorldCat Discovery (The patron can immediately determine that their item has arrived and is ready for pickup.)
- The Circulation module (Circulation staff will see that a hold is ready for pickup when the patron arrives.)
- The Hold Pickup Notification (The system generates a pick-up notification to be sent to the patron by email. Email notifications are sent at the top of every hour.).

6. Circulation staff check out the item to patron (WorldShare Circulation)

When the patron arrives to pick up the item, Circulation staff check out the item to the patron.

To check out the item:

1. Click the **Circulation** tab.
2. In the Enter barcode field, under Assist Patrons, scan or type the patron’s **barcode**.
3. In the patron’s account, in the Enter barcode field, scan or type the item’s **barcode**.
4. Review the due date on the book strap.
5. The due date will revert to the stricter date between what the lender due date in Tipasa and configurations of WorldShare Circulation policies. If you need to change the due date to allow time for processing before returning the item to the lender, make sure the item is selected and click **Change Due Date**, at the bottom of the screen.
   - If you have configured a **patron offset date**, this will be reflected in the **Due Date**.
   - Enter the new **Due Date** by typing the date or click the calendar button to select a date. Click **OK**.
6. Confirm the Due Date before giving the item to the patron.

7. Patron returns item and staff check in item (WorldShare Circulation/Tipasa)

Time passes while the patron has the item on loan. When the patron returns the item, Circulation staff or ILL staff check in the item.
To check in the item:

If you have enabled the **Check in item on returned** functionality in the Tipasa WMS integration module of the OCLC Service Configuration, the item is automatically checked-in when the request is marked as returned in Tipasa.

1. Tipasa staff mark the request as **Returned**.
2. The Circulation History will show the **Temporary item checked in to the circulation system**.
3. The item in Circulation will show as **Unavailable**.

If you have not enabled the automatic check in functionality:

**Circulation staff:**

1. Click the **Circulation** tab.
2. On the left navigation, click **Check In**.
3. In the Item Barcode field, scan or type the item’s **barcode**.
4. Staff are prompted with a message to update WorldShare request [ *Request ID* ].
5. Circulation staff may be instructed to route the item to the configured Temporary item home branch. See **ILL Settings** for more information. When the item is checked in at the temporary item’s home branch, the item’s status is updated to Unavailable.

**Tipasa staff:**

Once the item is returned to the ILL department, ILL staff mark the item as returned and ship the item back to the lender.

To mark the item as received and return it to the lender:

1. Click the **Interlibrary Loan** tab.
2. On the left navigation, click **Print Queue > Return Labels**.
3. Confirm that the item is listed.
4. On the left navigation, click **Borrowing Requests > Received/In Use** and open the item’s request.
5. Click **Return item**.
6. A confirmation message will appear and the item status is updated to Returned.
7. On the left navigation, click **Print Queue > Return Labels**. Process the print queue.
8. Print the label.

Affix the label to the package with the item and ship to the lender. Once the lender receives the returned item, they will mark it Checked In/Complete and the ILL request is closed.

When an ILL request is closed (marked as complete), it is archived. Personally identifiable patron information, including name and barcode, are removed. The request archive can be searched by Request ID. If the Request ID is used as the temporary item barcode, you can search within the Circulation module to find the item and see which patron last checked it out.

**Considerations:**
You may consider deleting the temporary item in the Circulation module once the request is closed by the lender.

In the Circulation module, the item details and statistics are updated and show:

- Last Issued To: The patron associated with the ILL request
- The temporary item will continue to display the Request ID and supplying library’s name for future reference.

## Lending workflow

### 1. ILL Staff respond to Borrowing Request

1. On the left navigation, click **Lending Requests > Can you Supply?** and review the Loan requests.
2. Once the requested item is retrieved, in the **Request Details** section, enter the barcode into the **Item Barcode** field.
3. Enter the desired **Due Date**.
4. Enter the **Item Barcode** of the item to supply the request.
5. Provide additional required fields.
6. Respond **Yes**. The status will update to **Shipped / In Transit**.
7. Optional. Print Shipping Labels and Book Straps/Stickers.
8. If configured in the [Tipasa WMS integration](https://help.oclc.org/Resource_Sharing/Tipasa/Circulation_integration/WorldShare_Circulation_Integration/00_Inte…) module, the item is checked out of WorldShare Circulation when shipped to the borrowing library.
9. The Circulation History will indicate that the **Item checked out of circulation system**.
10. The item is checked out to the borrowing institution patron account as configured when [setting up integration](https://help.oclc.org/Resource_Sharing/Tipasa/Circulation_integration/WorldShare_Circulation_Integration/00_Inte…).
   - You may wish to configure notifications to be sent to a staff email address for this account to be alerted about overdue ILL requests. Please see [Notifications](https://help.oclc.org/Resource_Sharing/Tipasa/Circulation_integration/WorldShare_Circulation_Integration/00_Inte…) for more information.
   - The **Due Date** is set by the request’s due date in Tipasa and not by Circulation policy configurations.
11. When viewing the item in WorldShare Circulation, the Item Details will include the Request ID and the borrowing institution for additional reference.
2. Receive the item from the borrowing institution

When the item is returned:

1. On the left navigation, under Lending Requests, click Returned > Returned/In Transit.

2. On the Returned/In Transit screen, click the request ID or Title to display the request. **Note:** Request queues where batch processing is available include a batch processing icon ( ) in the left navigation.

3. In the request, review and confirm the information in the Request Details accordion.

4. To complete the request, click Checked-in/Complete.

5. A confirmation message appears and the request is complete. **Note:** If the item is marked Not Returned, it appears in the left navigation under Returned > Returned but Missing and ages out of the system after 180 days.

6. If configured in the Tipasa WMS integration module, when the item is Checked in/Complete in Tipasa, it is checked in and appears available in WorldShare Circulation.
   - The item's status will be updated to Available or Unavailable per the Location Policy.
   - Holds and item schedules will not be fulfilled automatically. If the item is needed to fulfill a hold or schedule, the item will display on the Pull List at its home branch.
   - Circulation staff may wish to check-in the item again upon receipt to determine the next steps.
   - After the initial check in, the loaned item will no longer display the Request ID or Borrowing institution name in WorldShare Circulation.

If the item is checked in to WorldShare Circulation prior to Tipasa:

- Staff will be prompted to Update WorldShare request [Request ID].
- Tipasa staff will need to mark the request as Checked-in/Complete.