Learn how to create and manage off-system lending requests in Tipasa. Manually create new off-system requests to represent incoming email requests or off-system lending requests.

Create off-system lending requests

Use the Create Lending Request button in the Off-System Requests queue under the Borrowing and Lending sub-queues to create off-system lending requests.

From the blank lending request form:

1. Copy and paste request details from the email into the blank request form.
2. Enter the Borrower Name or Borrower Symbol. The Partner List will update as you type with the corresponding entries entered in the Address Book of the OCLC Service Configuration.
   - Once you have selected the Borrower from the partner list, the information from the partner institution record in the Address Book will automatically populate with the request, including the Ship To and Bill To addresses.
   - Refer to Address Book to find information about adding institutions to the Partner List.
3. Store the requesting system's Request ID in the Requester Reference ID field.
4. Add additional information such as the borrower's Max Cost, Need by Date, and Address.
5. Save the request.

The Request will appear in the Lending sub-queue of the Off-System Request queue.

Update off-system request details

Off-system requests will need to be edited for two main reasons:

1. You need to process and respond to an incoming email message from the request's off-system partner.
2. You need to instigate the next phase of the ILL transaction and send an email indicating the change to the request's off-system partner.

All fields in off-system requests are always editable. Certain fields are considered essential, and the system will warn you if these fields are accidentally removed or were never entered:

- Partner name
- Need-before date of the request
- Title of the item being requested

**Process updates in an existing off-system request**

When you receive updates from an off-system partner for an existing request, use the **Note** option on the request and enter any updates or important information as a Staff Note. Either copy and paste or manually enter the information into the Note, such as emails, dates, addresses, and other pertinent information.

The Staff Notes tab allows you to keep notes that are viewable and searchable only by your library staff and can be used as a repository for information about your off-system request. Staff Notes can be added to active and closed requests. The number on the tab indicates how many Staff Notes currently exist for a particular request. Refer to Staff Notes for additional information.

**Edit and add Staff Notes**

All staff users within an institution can add, edit and delete notes. Any staff member may edit any existing notes. The original author displays in the left column with the most recently-edited-by user name appearing just below the note.

Note: Only staff with the **WorldShare ILL Admin** role will be able to see the name of the author of the staff notes. Staff with the **WorldShare ILL User** role will see a date and time stamp for when the note was created/updated along with the name of the library.

The most recently added note will display at the top of the Staff Notes tab. Edited notes display based on the updated date and time.

**Add a Staff Note**

Note: There can be up to 500 notes per request.

1. From the request, select **Note** from the **Actions** panel.
2. Add the text of your note to the **Add Staff Note** text box.
   - There is a 500-character limit for each note.
3. Click **Add**.
   - To remove any text added to the Add Staff Note box, click **Cancel**.

**Edit a Staff Note**

1. From the request, click on the **Staff Notes** tab.
2. Next to the desired **Staff Note**, click on the button.
3. Select **Edit**.
4. Make the desired edits in the text box.
5. Click **Update** to save your changes.

A message appears confirming the note was successfully saved.

### Change the status of an off-system request

When it is time to Cancel, Ship, Receive, Return, or check in an off-system request, it is recommended that staff make the necessary updates to the request details before changing the request status.

- Off-system lending and borrowing requests that are 14 days overdue will automatically have the overdue status applied.
  - Use the Item overdue notification to notify the borrowing library when an off-system request moves to the overdue status. Refer to [Email an off-system partner](https://help.oclc.org/Resource_Sharing/Tipasa/Off-System_Requesting/Off-system_lending) for more information.

Use the **Change Status** dropdown to change the request status. Select the appropriate status after request details are updated.

Note: Changing the status of a request automatically saves any changes that have been made.

If the status change is important to the patron, use the Email button to send them an email with information regarding the status of their request.

### Email an off-system partner

Use the **Email** button to send an appropriate email to the off-system partner. Emailing the off-system partner after updating the request details and status ensures that the email contains all the correct details.

You can configure the Item overdue notification to be sent to the borrowing library when an off-system request moves to the overdue status. Requests move to the overdue status automatically after 14 days overdue. This notification is available for manual and automated sending and is configurable in the [OCLC Service Configuration](https://help.oclc.org/Resource_Sharing/Tipasa/Off-System_Requesting/Off-system_lending) in the Notifications section of the WorldShare ILL module. Refer to [Notifications, Off-system Automated Messages](https://help.oclc.org/Resource_Sharing/Tipasa/Off-System_Requesting/Off-system_lending).
From the email template, enter the recipient's email address manually or select the email from the address book.

- To review emails sent regarding an off-system request, navigate to the Notifications section of the Request History accordion on the request.
- To review emails received regarding an off-system request, navigate to the Staff Notes tab to review the history of messages received and manually entered as a Note.

We recommend using separate templates for each of the major status changes: Request, Cancel, Shipped, Unfilled, Received, Returned, etc., because this makes them more easily identifiable in the notification history. See Notifications for more information.

**Example lender's template to be used for sending emails to an off-system lender:**

**Example**

Replace any general text with your library's information.

ILL Request: ${RequestId!} - ${RequestStatus!}
Borrower's Reference:

Service Type: ${RequestType!}
Borrower: ${RequesterSymbol!} Dev Test Library
Lender: ${SupplierSymbol!} Fred Smith Library

Created: ${CreateDate!}
Need Before Date: ${NeedBeforeDate!}
Shipped Date: ${SupplierShippedDate!}
  Shipped Item Barcode:
  Due Date: ${DueDate!}

Borrower Max Cost: ${RequesterMaxCost!}
Lender Charge:

BIB DETAILS
Title: ${Title!}
Publisher: ${Publisher!}

MONOGRAPH
  Author: ${Author!}
  Edition: ${EditionNote!}
  Desired Edition: ${EditionType!}
  ISBN ${ISBN!}
SERIAL / ARTICLE
  Article Title: ${ArticleTitle!}
  Article Author: ${ArticleAuthor!}
  Pages: ${Pages!}
  Volume: ${Volume!}
  Issue: ${Issue!}
Statistics and Reporting for off-system requests

Review off-system requests using OCLC Usage Statistics to track your off-system requests along with all your other forms of ILL requests.


Note: All off-system requests displayed in statistics will show the off-system partner as having the OFSYS OCLC symbol.