Tipasa


Tipasa provides new functionality that speeds fulfillment of interlibrary loan requests to save time for your staff and users. For implementation materials, please see Tipasa Implementation.

- **Get started**
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  - Get started with Tipasa.
    - Add a privacy notice
    - Contact OCLC Order Services
    - Create a Tipasa account
    - Prepare and plan
    - Set or reset your password
    - Sign in to Tipasa
    - Tipasa account roles

- **Article Exchange**
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  - This guide provides an overview of product features and related technologies. In addition, it contains recommendations on best practices, tutorials for getting started, and troubleshooting information for common situations.
    - Add Article Exchange as preferred delivery method
    - Article Exchange workflow
    - Technical requirements

- **Batch processing**
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  - Use batch processing to receive, return, and complete requests for multiple items.
    - Batch processing for borrowers
    - Batch processing for lenders
• **Borrowing Requests**

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Create, manage and process borrowing requests.

- Borrowing Request fields
- Create and edit requests
- Process requests
- Proven Senders
- Return items
- Search for requests
- Send notifications to borrowers

• **Configuration**

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Administrative settings for Tipasa are maintained in OCLC Service Configuration. In Service Configuration, you can set your interlibrary loan options, print settings, borrower and lender constant data, custom holdings groups, direct request profiles, and purchase options. As a Tipasa user, you can also turn on or off additional Tipasa settings.

- Interlibrary Loan Options
- Borrower Data
- Lender Data
- Custom Holdings Groups
- Custom Holdings Paths
- Direct Request Profiles
- Purchase Options
- Patron Request workforms
- Print Settings
- Advanced Workflows
- Patron Settings
- Notifications
- External System Settings
- Tipasa WMS Integration

• **Constant data**

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This guide provides an overview of product features and related technologies. In addition, it contains recommendations on best practices, tutorials for getting started, and troubleshooting information for common situations.
• Copyright
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Find information about managing copyright in the United States.
  ◦ US Copyright management
  ◦ Copyright for non-US libraries

• Discover Items
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When you click Discover Items on the left navigation, an Advanced Search form will open on the screen. Completing a basic search will pre-populate the Advanced Search form with the terms from the original search. You can also conduct a search using only the Advanced Search form.
  ◦ Search

• Document Delivery
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The Document Delivery features allow your library to fulfill requests from patrons with items from your own collection.
  ◦ Advanced Lending and Document Delivery
  ◦ Create and process Document Delivery requests
  ◦ Document Delivery request fields
  ◦ Send document delivery notifications to patrons
  ◦ Set up Document Delivery

• Document suppliers
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The documentation in this section explains how to receive articles from document suppliers such as the British Library, Get It Now, and MyBib.
  ◦ Get It Now (mediated service)
  ◦ Use MyBib eL to deliver documents

• Export
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With Tipasa, you have access to the Export feature. All queues (except the Print queues and Linked Requests queues) and search results have the Export All button, which allows you to export all items in the queue or search results tab. When you export a queue or search results, you will be given a comma separated value (CSV) file. You can use this file for printing (merge request data with custom Microsoft Word, or other, print templates).
- Export a queue or search results
- Export Fields

- Interlibrary Loan Fee Management

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The Interlibrary Loan Fee Management (IFM) feature lets libraries reconcile resource-sharing charges and payments through their monthly OCLC invoice. IFM helps libraries save money on fee-based transactions and simplify the transaction process.

- Configure IFM
- Manage IFM

- Lending Requests

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Create, manage and respond to lending requests.

- Advanced Lending
- Complete requests
- Deflections
- Edit requests
- Lending Priorities
- Lending request detail
- Lend to non-OCLC libraries
- Respond to requests
- Search for requests
- Send notifications to borrowing libraries

- Patron management

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With Tipasa, you can access your library’s patron accounts for viewing, editing, and approving.

- Create patron accounts
- Manage patron accounts
- Search for patrons
- Tipasa patron data files

- Print

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With Tipasa, you can print individual requests, all requests in a queue, add requests to the print queue to print out later, and queue book straps and shipping and return labels to be printed.
Printing for Borrowers
◦ Printing for Document Delivery Requests
◦ Printing for Lenders
◦ Printing for Purchasing Requests
◦ Print requests and manage queue

• RapidILL

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RapidILL (OCLC symbol RAPID) is a service that allows Tipasa libraries with a subscription to RapidILL to submit and respond to copy requests through RapidILL from within the Tipasa interface.

◦ Manage borrowing requests
◦ Manage lending requests
◦ Set up RapidILL

• Tags

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Tags are custom labels that can be applied to active requests. Your library can use tags as a way to group and keep track of requests. Tags are only visible to your library. The system maintains all tags created and saved to a request, and you can search for active and closed requests using tags. You can create up to 100 unique tags.

◦ Manage Tags
◦ View Tags

• User portal

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The user portal is the patron interface of Tipasa. In the user portal, patrons can create requests, see the status of requests they submitted, and access any electronic documents that have been delivered via Article Exchange, knowledge base, or open access links. If enabled, patrons can also cancel or renew their requests. See for more information. Patrons will need to sign in to access the user portal.

◦ Communication Preferences and Account Details
◦ Customize the User Portal
◦ Requests
◦ Saved Searches

• Purchasing Requests

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The Purchase option allows you to track items you may wish to purchase, instead of borrowing via interlibrary loan.

◦ Purchasing Requests
WorldShare Acquisitions integration

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Tipasa and WorldShare Acquisitions integration provides you with a method of submitting purchase requests directly to WorldShare Acquisitions from within the Tipasa interface.

- Set up integration
- Submit requests to WorldShare Acquisitions

- WorldShare Circulation Integration

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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, checkout items that your library is lending, or checkin items at the end of the loan period.

- Exception Processing
- Integration Workflow
- Policy Considerations
- Set up integration

- Reference

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Additional resources for Tipasa users.

- Categories and queues
- Configure OpenURL
- Days To Respond
- Formats
- ILL sources
- ILL statuses
- Notes
- Reports
- Request Aging
- Resource sharing features
- Search my library’s online catalog

- Tipasa release notes and known issues

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Find Tipasa release notes and known issues. Release notes are documents that contain information about new product features and enhancements as installed in scheduled releases.
2018 Tipasa release notes
- 2017 Tipasa release notes
- Known issues

**Tipasa training**

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Find training on Tipasa.

- Live classes
- Introduction to Tipasa
- Lending priorities and advanced lending workflows
- Patron management and notifications
- Copyright management
- Document delivery
- Exercises
- Videos

**Troubleshooting**

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Find frequently asked questions (FAQ) and troubleshooting steps (Troubleshooting).

- Do you have a list of recommended models of Barcode Readers for Tipasa and WMS?
- How are the status and department fields used in Tipasa patron information?
- How do I apply a Custom Holdings Path to a request?
- How do I block a patron from using Interlibrary Loan?
- How do I request a change to a product?
- If I delete a tag in Tipasa, will the system remember it later?
- Is it possible to point the SQL Alias Manager to two separate ILLiad Databases
- Is there a way to partially receive an ILL Request?
- I need the Username and password for the Server Installer
- I want to make sure that users will receive notifications. How can I whitelist the notification servers?
- Patron ID field not populating the request form
- Unable to delete Custom Holdings Groups
- We've recently switched to Tipasa from ILLiad, can we still access our ILLiad reports?
- We are getting a message when we try to logon that our Security Certification has expired
- We have not received any new lending requests in ILLiad today
- We need to restart our server because we haven’t received new requests in a few hours and there are many new ones in Worldcat Resource Sharing that haven’t pulled in
When I log into Tipasa staff user interface, I get the WorldShare interlibrary loan home staff user interface page instead

- Why are there no IFM Lending and Borrowing statistics for my library this month?
- Why are overdue notices going out even after I send a renewal request in TIPASA?
- Why do direct requests for articles sometimes request the article OCLC number, and other times request the OCLC number of the journal they are in?
- Why is state/province information not appearing when I apply patron data to a borrowing request?
- Will a Direct Request go through if there is no patron ID located?