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
    - 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

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, automations, 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
- Automated Request Manager (formerly Direct Request)
- Purchase Options
- Patron Request workforms
- Print Settings
- Advanced Workflows
- Patron Settings
- Notifications
- External System Settings
- Contacts
- Tipasa Non-WMS Circulation Integration
- Tipasa WMS Integration

• Constant data

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.

- Constant data
• Copyright

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Find information about managing copyright.

◦ 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 Get It Now and MyBib.

◦ Article Galaxy from Reprints Desk
◦ 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 and closed 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 200 unique tags.
  ◦ Manage Tags
  ◦ View Tags

• My Account
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  My Account is the interface for users at libraries with Tipasa, WorldShare Circulation, or WorldCat Discovery. Features available to the user vary depending on the service(s) to which your library subscribes.
  ◦ My Account for Tipasa
  ◦ My Account for Tipasa and WorldShare Circulation

• 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

• Reports
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Reports are available to Tipasa users through OCLC Usage Statistics, WorldShare Reports, and Report Designer.

- OCLC Usage Statistics
- WorldShare Reports for Tipasa
- WorldShare Report Designer for Tipasa

• 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

• Circulation integration

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Circulation integration provides you with a method to streamline the interlibrary loan-circulation process and workflow.

- WorldShare Circulation Integration
- Third-party Circulation 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
- Request Aging
- Resource sharing features
- Search my library's online catalog
- Use the Reasons for No Reports to optimize borrowing and lending

• 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.

- 2020 Tipasa release notes
- 2019 Tipasa release notes
- 2018 Tipasa release notes
- Known issues

**Tipasa training**

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Find training on Tipasa.

**Troubleshooting**

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

- Are weekends included in days to respond or the aging of a request?
- Can .tiff files be sent through ILL?
- Can I request part of a book through Article Galaxy from Reprints Desk?
- Can we mark a request as "Urgent"?
- Does a patron need an ILL account in order to submit an ILL request?
- Do you have a list of recommended models of Barcode Readers and printers for Tipasa and WMS?
- Error Message "Get it Now Request is using an invalid IFM payment token"
- Error: Some information is incorrect. Please review.
- How are the status and department fields used in Tipasa patron information?
- How can I get past the "Failed to send email. A system error has occurred" error when sending Article Exchange emails?
- How can we view all lending requests, including deflections?
- How does IFM handle various currencies in different requests?
- How do I apply a Custom Holdings Path to a request?
- How do I block a patron from using Interlibrary Loan?
- How do I create a link directly to the patron request workform?
- How do I grant someone access to approve patrons?
- How do I make a renewal request in Tipasa?
- How do I print book stickers instead of book straps?
- How do I shut down borrowing in Tipasa?
- How do I submit a copyright payment report using Tipasa?
- How do I transfer a patron’s ILL requests to the patron’s new library card number?
- If I delete a tag in Tipasa, will the system remember it later?
- If users don't have notifications turned on will they still get Article Exchange links in My Account?
- Is a FirstSearch subscription required to use Tipasa?
- Is there any way to have user status information auto populate based on the patron's information?
- Is there a way to partially receive an ILL Request?
- I am getting an error occurred message when trying to fulfill a request after buying the content through GetItNow.
- I am seeing the error message: "Shipped date is out of bounds"
- I am unable to upload a file to Article Exchange. Is there a file size limit?
- I cannot remove the Need Before Date from Borrower Constant Data.
- There are requests in the New for Review queue but I am unable to display them.
- I changed a request to Document Delivery, but it won't let me upload a file.
- I do not want to lend to a specific group of libraries, how do I configure my deflection policy?
- I received the document to fulfill a request via email, but the request still appears as Considering.
- I want to make sure that users will receive notifications. How can I whitelist the notification servers?
- I'm trying to purchase this article through Get it Now, but I received an error message "An error occurred processing the request".
- My tags have disappeared from my Tipasa Homepage.
- On our "Loan available for pickup" notification, the pick up location is not filling in.
- Our patrons are submitting Loan Requests without an OCN, why is this happening?
- Patron ID field not populating the request form.
- The default pickup location is not displayed correctly in the patron request workform.
- We've recently switched to Tipasa from ILLiad, can we still access our ILLiad reports?
- What are Linked Requests?
- What guidelines does the copyright module follow for copyright management?
- What vendors are available in the Purchase Options section within an ILL request?
- When I click Print All in Tipasa, the print jobs are not being sent to my printer.
- When I log into Tipasa staff user interface, I get the WorldShare interlibrary loan home staff user interface page instead.
- When trying to save the Patron Request Workform in the OCLC Service Configuration, I am receiving an error message that says "A field name must be selected".
- When we try to open the Tipasa ILL request form a different ILL template displays instead.
- Why are there no IFM Lending and Borrowing statistics for my library this month?
- Where can I change the Reply To Email in Notifications?
- Where can I find a list of current Tipasa libraries?
- Why am I getting this error message when checking in an ILL request "Temporary item record failed to create (exception) unrecognized user"?
- Why am I seeing an error message when I attempt to delete a custom holdings group?
- Why am I seeing a workform cannot be loaded error when I attempt to load my patron request workform?
Why aren't notifications being sent to the borrowing library?

- Why are my e-periodical requests coming back unfulfilled
- Why are my off campus patrons receiving an error message that says "Null Relay: HTTP session was not found" when they try to access My Account?
- Why are overdue notices going out even after I send a renewal request in TIPASA?
- Why are patrons able to make ILL requests when they are expired
- Why are the due dates appearing in an incorrect format in the Tipasa user interface?
- Why are we getting a "Missing or invalid Status" error in the Tipasa User Portal?
- Why can't I mark an article exchange request received?
- Why did I get the error message "Direct request processing failed"?
- Why doesn't my custom notification autopopulate the patron's email address?
- Why do requests for articles sometimes request the article OCLC number, and other times request the OCLC number of the journal they are in?
- Why do the Patron Request forms not automatically update with the patron's information?
- Why is state/province information not appearing when I apply patron data to a borrowing request?
- Why is there a request in the AE Alert queue with no Article Exchange link?
- Why is the error incomplete contact information for patron appearing when I try to send an email?
- Why is the LinkUserPortal data insert not pulling in the correct URL for our Tipasa My Account page?
- Why is the return address incorrect on our library's shipping labels?
- Will an Automated Request go through if there is no metadata on the request?
- Will an Automated Request go through if there is no patron ID located?
- Will users who have set up their notification settings in My Account get emails about pre-Tipasa transactions?