

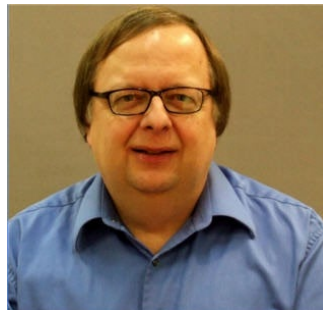
Tipasa®

Document delivery

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Senior Product Trainer

OCLC



Learning objectives

- Set up document delivery by configuring
 - automations
 - patron request workflows
 - notifications
- Fulfill requests from your patrons
 - for physical or electronic resources that your library holds or licenses
 - for open access resources
- Change fulfillment type between document delivery and ILL request

Definition of Document Delivery

Your patrons



Your collection



No lending library





Your collection includes

- Physical items (holdings set in WorldCat)
- Copies from print journals your library holds
- Links to resources your library has registered in the WorldCat knowledge base
- Open Access links
- Links to other electronic resources your library has available

Reasons to consider Document Delivery

- You allow patrons to request copies from journals held in your print collection.
- You fill book/returnable requests for held items and ship them to your distance education students or other remote patrons, or deliver them to faculty offices.

Document Delivery queue

- Tipasa™ Home
- ▶ Discover Items
- ▶ Find Patrons
- ▶ Borrowing Requests
- ▼ Document Delivery**
 - New (2) 
 - New - Copies (2)
 - In Process (1)
 - Retrieving (1) 
 - Create Request
- ▶ Lending Requests
- ▶ Purchasing Requests
- ▶ Off-System Requests
- ▶ Print Queue (8)
- ▶ Manage Copyright

Tipasa Home

Search for requests

Request ID

Active Requests Closed Requests

Frequently Used Tags

[Refresh List](#)

▶ All Tags (1)

Quick Links

Borrowing:

[AE Alert \(1\)](#)
[Produced \(9\)](#)
[In Transit \(1\)](#)
[Received? \(1\)](#)
[Unfilled \(8\)](#)

Received
Returned

Lending:

Lending Priorities
[Can You Supply? \(10\)](#)
[New - Copies \(7\)](#)
[New - Loans \(3\)](#)
Supplied
[Not Received \(1\)](#)
[Overdue \(1\)](#)
Returned

Document Delivery:

New (2)
[New - Copies \(2\)](#)
In Process (1)
[Retrieving \(1\)](#)

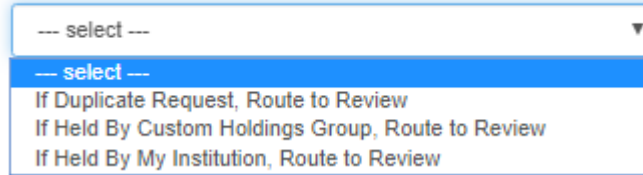
Other:

[OCLC Policies Directory](#)
[OCLC Service Configuration](#)
[OCLC Usage Statistics](#)
[OCLC Article Exchange](#)
[Resource Sharing News](#)
[WS ILL Training Resources](#)
[OCLC Community Center](#)

Automations > Route to Document Delivery

- Without Document Delivery turned on, 3 options for exceptions:

Exceptions



--- select ---

--- select ---

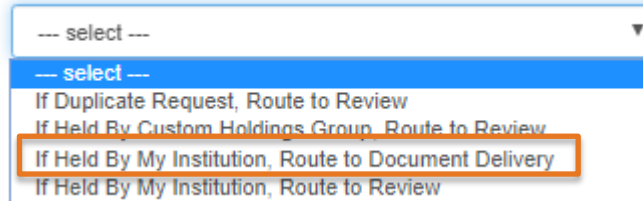
If Duplicate Request, Route to Review

If Held By Custom Holdings Group, Route to Review

If Held By My Institution, Route to Review

- With Document Delivery turned on, 4 options for exceptions:

Exceptions



--- select ---

--- select ---

If Duplicate Request, Route to Review

If Held By Custom Holdings Group, Route to Review

If Held By My Institution, Route to Document Delivery

If Held By My Institution, Route to Review

Automatic routing to Document Delivery

- To automatically route to the Document Delivery queue, patron request must contain ISBN, ISSN, or OCLC number
- If the request doesn't have any of these, it will route to New for Review

Tipasa™ Home

- ▶ Discover Items
- ▶ Find Patrons
- ▼ **Borrowing Requests**
 - New For Review (1)
 - Not Reviewed (1)
- Produced (5)
- In Transit (5)
- Received? (5)
- Received (6)
- Received/In Use (6)
- Overdue (6)
- Returned (5)

Tipasa Home

Search for requests

Request ID

Active Requests Closed Requests

Frequently Used Tags

There are no tags for this institution. Please create a tag upon reviewing a request

Quick Links

Borrowing:	Lending:	Document Delivery:
New For Review (1)	Can You Supply? (2)	New (4)
Not Reviewed (1)	New - Copies (2)	New - Copies (1)
Produced (5)	Supplied	New - Loans (3)

Knowledge base link

Journalism & mass communication educator. [Previous Request](#) [Next Request](#)

[Mark as Complete](#) [Change Fulfillment Type](#) [Cancel Request](#)

Actions: [Mark as Verifying](#) [Note](#) [Save](#) [Reset](#) [Email](#) [Print Now](#)

[Request](#) [Purchase](#) [Staff Notes](#) 0

Request Details (Request ID [redacted])

Patron Summary

Source [redacted]
Status: Delivering

Fulfillment Type: Document Delivery

URL Type: Article Exchange
URL: [redacted]
[OCLC Article Exchange](#)

Title / Journal: Journalism & mass communication educator.

Uniform Title: [redacted]

Author: Association for Education in Journalism and Mass Communication; Asso

Publisher: Columbia, SC : Association for Education in Journalism and Mass Comm

ISBN: 21614326

ISSN: 10776958

OCLC: 30857992

[Search my library's online catalog](#)

Local ID: [redacted]

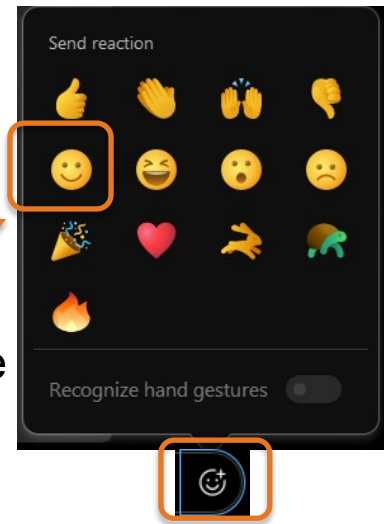
Open Access
No links found
Apply Citation

Library's Holdings Information
Collection: [Education Source](#)
Collection: [Education Research Complete](#)
Collection: [Communication and Mass Media Complete](#)
Collection: [EBSCO Communication Source](#)
Collection: [ProQuest Central](#)

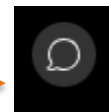
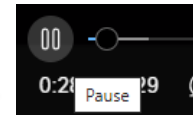
[Search Google Scholar](#)
[Search Google Books](#)
[Search Google](#)

Quiz

- If you are participating in a live online class
 - See clickable link in Webex chat panel
 - When you have finished the quiz, please click the smile reaction from the bottom of the screen
 - To open chat panel, click the button at the bottom right of the screen




- If you are viewing a recording
 - Pause the recording (use button at bottom of screen) to do the quiz
 - See clickable link in Webex chat panel
 - To open the chat panel, click the button in the upper right corner



Reports



Need Help? 
User support info

-  Metadata
- Acquisitions
- Circulation
- Interlibrary Loan
- Analytics**
- Admin

▶ Collection Evaluation

▶ My Files

▼ **Reports**

Reports

Report Launch Pad

Reports

▶ Metadata Reports

▶ Circulation Reports

▶ Cataloging/Collection Reports

▼ Interlibrary Loan Reports

[Document Delivery Activity Overview](#)

[Document Delivery Request Detail](#)

[Document Delivery Request Statistics](#)

Documentation and training



Or directly at

https://help.oclc.org/Resource_Sharing/Tipasa

A screenshot of the OCLC Tipasa help page. The page header includes the OCLC logo and navigation links for 'System Status Dashboard', 'Contact OCLC Support', and 'Tell us'. A search bar contains the text 'How can we help you?'. Below the search bar is a breadcrumb trail: 'Home > Resource Sharing'. The main heading is 'Tipasa' with a sub-heading 'Last updated: Feb 2, 2018'. A paragraph states: 'Tipasa provides new functionality that speeds fulfillment of interlibrary loan requests to save time for your staff and users.' Below this is a link: 'For implementation materials, please see Tipasa Implementation.' The page is divided into several sections: 'Get started' (with links for 'Contact OCLC Order Services' and 'Create a Tipasa account'), 'Article Exchange' (with a link to a guide), 'Print' (with links for 'Print requests', 'Printing for Borrowers', 'Printing for Document Delivery Requests', and 'Printing for Lenders'), 'Tags' (with links for 'Manage Tags' and 'View Tags'), 'User portal' (with a link to the user portal), and 'WorldShare Circulation Integration' (with a link to a guide). The OCLC logo is at the bottom left.

Community Center

- Discussions with Tipasa users in other institutions
- News and events
- Search enhancement requests or contribute your own



A screenshot of the OCLC Community Center website. The top navigation bar includes "OCLC", "Support", "Research", "Community" (underlined), "Developer", and "WebJunction". Below this is a secondary navigation bar with "Community" and dropdown menus for "Welcome", "Product Communities", "Knowledge Communities", "Events", "Recordings", and "Ideas". The main content area has a green background with a circuit pattern and the word "Tipasa" in white. Below this is a search bar with a dropdown menu set to "All community" and the text "Search all content" followed by a search icon. At the bottom, a breadcrumb trail reads "OCLC Community Center > Product Communities > Tipasa".

Thank You!

When you exit from WebEx, you will automatically be directed to an evaluation form:

- **Instructor:** Rick Newell
- **Class name:** Document Delivery

Training questions (what's covered in a class, etc.)?

Contact Rick Newell

newellr@oclc.org or 1.800.848.5878