Find information about steps you can take to prepare for your use of Tipasa. There are a few things you can do to prepare for your use of Tipasa.

Learn more in a training course: Introduction to Tipasa

Message Board

Use the Message Board located below the Quick Links section on the Tipasa home page to find information about scheduled system maintenance, training opportunities, ILL-related webinars, and other information about the ILL system.

Browser compatibility

Use the browser compatibility chart to ensure your systems are up to date and can support Tipasa.

OCLC Policies Directory

Add or update your records in the OCLC Policies Directory. The OCLC Policies Directory allows you to:

- Communicate to other libraries your library’s schedules, contacts, and collections, as well as lending and copying policies.
- Automatically deflect some lending requests based on criteria your library specifies.

Once logged in, on the home screen under Quick Links, click OCLC Policies Directory.

For more information, see OCLC Policies Directory. For training related to the OCLC Policies Directory, see:

- Establishing Policies in OCLC Policies Directory
- Basics of deflections
- Fine-tune your Policies and Deflections: A workshop
  - Requires Community Center login.

OCLC Service Configuration

Administrative settings for Tipasa are maintained in OCLC Service Configuration. On the home screen, under Quick Links, click OCLC Service Configuration to go to Service Configuration. For more information on these settings, see OCLC Service Configuration settings.

https://help.oclc.org/Resource_Sharing/Tipasa/Get_started/Prepare_and_plan
Printed: Thu, 22 Sep 2022 06:11:58 GMT
<table>
<thead>
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<th>CONFIGURATION</th>
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| Constant data (borrower data and lender data)     | Store frequently-used data, such as address information, and apply it to requests. | • Constant data  
• Borrower data  
• Lender data                                                   | • Creating constant data  
• Curate and Care for your Constant Data: A workshop  
  ◦ Requires Community Center login                           |
| Custom Holdings groups and paths                  | Automatically build lender strings, which are libraries to which your borrowing request will be sent, based on your preferred lenders. Also used for deflections and for lending priorities groups and proven senders. | • Custom Holdings groups  
• Custom Holdings paths                                        | • Custom Holdings for interlibrary loan  
• Construct your Custom Holdings: A workshop  
  ◦ Requires Community Center login                           |
| Automated Request Manager                         | Automate the processing of new borrowing requests.                  | • Automated Request Manager                                    | • Automate your Request Process: A workshop  
  ◦ Requires Community Center login                            |

**Smart fulfillment**

Increase the speed of delivery of materials based on policy data, lending history, licensing agreements, format preferences, and more. Smart fulfillment includes the following features:

- Real-time availability for ILL
- Automated Request Manager (ARM)
- Smart lender strings
- Express program
- Turnaround Time dashboards

See [Smart fulfillment](https://help.oclc.org/Resource_Sharing/Tipasa/Get_started/Prepare_and_plan) for more information.
For training related to Smart fulfillment, see:

- [Automate your Request Process: A workshop](#)
  - Requires Community Center login

**Print settings**

Add your logo to book straps. See [Print](#) for more information.

For training related to printing, see:

- [Print ILL requests](#)
- [Borrower: Print book straps and return labels](#)
- [Lender: Print book straps/stickers and shipping labels](#)

**Additional features**

Find information about additional Tipasa features that you and your staff may want to learn more about as you begin.

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<td>Borrowing workflows</td>
<td>Efficiently process new requests from your library’s patrons.</td>
<td>• <a href="#">Borrowing requests</a></td>
<td>• <a href="#">Borrowing workflows</a></td>
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<tr>
<td>Lending workflows</td>
<td>Efficiently process lending requests from other libraries.</td>
<td>• <a href="#">Lending requests</a></td>
<td>• <a href="#">Lending workflows</a></td>
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<td>Interlibrary Loan Fee Management (IFM)</td>
<td>Reconcile resource-sharing charges and payments with other libraries through their monthly OCLC invoice.</td>
<td>• <a href="#">Interlibrary Loan Fee Management</a></td>
<td>• <a href="#">OCLC IFM: Interlibrary Loan Fee Management</a></td>
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<tr>
<td>Document Delivery</td>
<td>From the Document Delivery queue, fill requests with items from your own collection or choose to use this as an opportunity to educate patrons on how to search</td>
<td>• <a href="#">Document Delivery</a></td>
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<td>Proven Senders</td>
<td>Designate individual lenders who provide good quality documents as proven senders. Proven Senders can be combined with automations to allow patrons to receive copies as soon as the lenders scan and send them. See Automated Request Manager for more information.</td>
<td>• <a href="https://help.oclc.org/Resource_Sharing/Tipasa/Get_started/Prepare_and_plan">Proven Senders</a></td>
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<td>Reports</td>
<td>Track metrics, spot trends, and monitor your library’s Tipasa usage</td>
<td>• <a href="https://help.oclc.org/Resource_Sharing/Tipasa/Get_started/Prepare_and_plan">Reports</a></td>
<td>• <a href="https://help.oclc.org/Resource_Sharing/Tipasa/Get_started/Prepare_and_plan">WorldShare Reports training</a></td>
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<td>• <a href="https://help.oclc.org/Resource_Sharing/Tipasa/Get_started/Prepare_and_plan">Make your usage statistics count</a></td>
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<td>◦ Requires Community Center login</td>
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<td>• <a href="https://help.oclc.org/Resource_Sharing/Tipasa/Get_started/Prepare_and_plan">Create a report from the ILL universe</a></td>
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your collection more effectively.