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Patron management, My Account,
patron request workforms, notifications

Overview

- Patrons log in to My Account to complete request workforms and submit requests; check on the status of requests; and access Article Exchange, knowledge base, and open access links.
- Your library can customize the patron request workforms.
- You can configure your library's discovery interfaces (including WorldCat Discovery) to send OpenURL links to the forms in My Account. This will populate the workforms with bibliographic data.
- Requests submitted by patrons appear in your New for Review queue. (If the request matches an applicable automation, the request can go directly to a lending library or to your Document Delivery queue).
- Your library can customize patron notifications.

Setup

In **OCLC Service Configuration**:

- To customize the logo, colors, etc. in My Account, go to **WorldCat Discovery and WorldCat Local** > **User Interface Options**. If your library has already customized these settings for other OCLC services such as WMS or WorldCat Discovery, these settings will also apply to My Account.
- If your library uses WorldCat Discovery, go to **WorldCat Discovery and WorldCat Local > Place Hold/Request Buttons** to configure buttons to send OpenURL links to patron request workforms to populate bibliographic data. Documentation and a video are available.
- Go to **WorldShare ILL**
  - ○ Go to **Patron Settings**
    - ▪ **Patron Account Management**
      - • If you want to require approval for new ILL patron accounts, select the **On** box. Most libraries will choose not to require approval, especially if they are migrating a file of (already-approved) patrons.

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- **Patron Request Management**
  - By default, Display Patron Due Date is set to On. The due date displayed in My Account will be the lender's due date, minus any offset configured in Number of days to offset patron's due date. If you want to prevent inconsistencies with your circulation system due date, you can:
    - Deselect this option. The due date does not display in My Account and the status will be Received by library.
    - In Print Settings, deselect Show Due Date on borrower book straps/stickers.
  - Select the number of days (0-5) you want to offset the patron's due date. This setting allows you to specify whether the patron's due date should occur before the lender's due date. The offset date will appear to patrons in My Account and notifications, as well as any borrower book straps/stickers you print.
  - If you want to allow patrons to renew ILL requests from My Account, select the **On** box.
  - If you want to allow patrons to cancel ILL requests from My Account, select the **On** box.
  - Optional: If you want to limit the number of active requests allowed per patron, enter a number 1-500. For no limit, leave blank.
- **Patron Data Retention**
  - Select number of months (1-60) to retain patron data after a request is closed. Default is 1 month.
  - This setting affects:
    - How long patrons have access to closed requests in My Account
    - How long ILL staff can retrieve closed requests by searching on Patron Name or Patron ID in the staff interface
  - Patrons will have access to closed requests through My Account back to the latest of: August 2018, your library's Tipasa go-live date, or the number of months in your library's patron data retention setting.
  - You can use the Tipasa staff interface to retrieve requests up to 5 years old by searching keyword, author, or Request ID. However, requests dated before August 2018 (or your shorter retention period) are not linked to the user and are not retrievable with patron name, ID, or department.

- Go to **Patron Request Workforms**. For each of the three forms (Article, Book, Other), follow the instructions in [Tipasa Help](#) to customize the forms.
    - Tipasa libraries should not use the WorldCat Discovery Request form, because it only offers IP authentication. If you set up the WorldCat Discovery Request Form, patrons will be unable to track and view their requests in My Account. Instead, OCLC recommends configuring the resource sharing button in your WorldCat Discovery catalog with OpenURL to link to the forms in My Account. This will populate the forms with bibliographic data. Your OCLC implementation managers can help you set this up.
- Go to **Notifications**. Follow the instructions in [Tipasa Help](#) to customize the notifications.
    - Select whether your library will send SMS text notifications.
    - By default, no notifications are turned on. Tipasa provides 28 event-specific notifications. You may also configure up to 50 custom notifications.
    - Most of the 28 event-specific notifications may be automated (triggered by an event, such as receiving an item), manual or both. Most may be sent as email, SMS text message, or both.
    - Custom notifications (email only) are sent only manually (by using the email function within the Tipasa staff interface).
    - Edit each notification as needed. In each notification, be sure to include the appropriate contact information for your library.
   - For every notification you want to turn on, select Manual and/or Automated (where applicable).

Process requests

Requests submitted by patrons appear in your New for Review queue. Process these according to your usual workflows.

Tipasa processes requests that match an applicable automation accordingly, which may include routing to your Document Delivery queue, building a lender string, or automatically sending requests to lenders.

Manage patrons

- While viewing a request, you can:
  - View a brief summary of patron information by hovering your mouse over **Patron Summary**
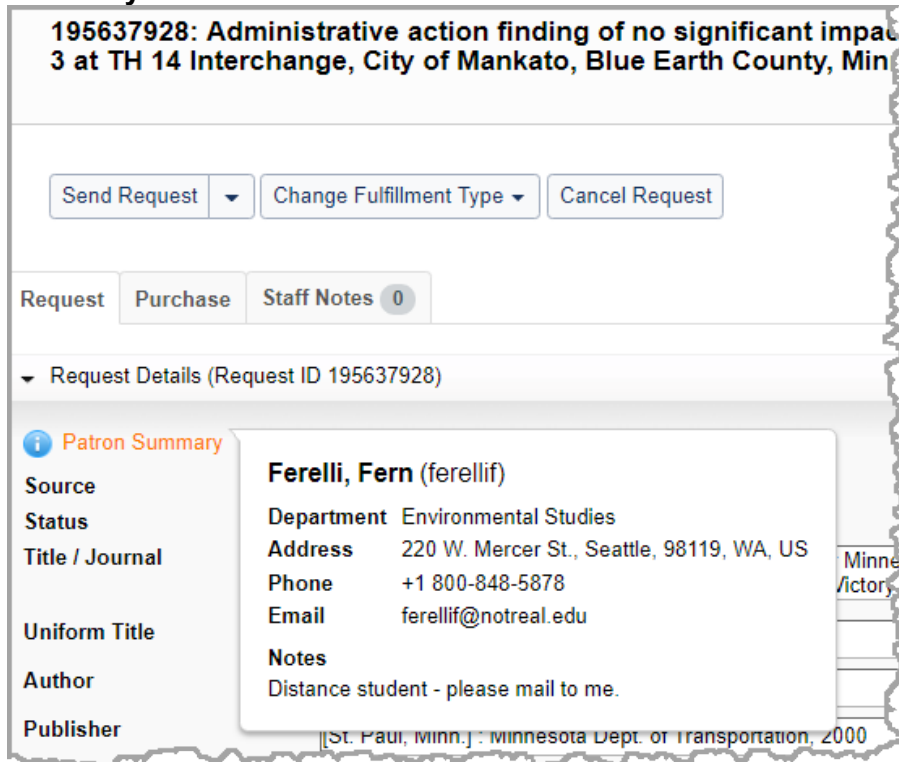
  - Scroll to the Patron section at the bottom of the request to view full patron details
- From the Tipasa staff interface, there are two ways to open and edit a patron record:
  - While viewing a patron-submitted request, click **View Patron**
  - From the left navigation, click **Find Patrons**. Search by any of the available indexes.
- With a patron record open, you can:
  - View patron information. In the Basic User Data section, scroll to the Interlibrary Loan and ILL Delivery Notification sections.
  - Edit patron information (click the **Edit** button at the top right of the Basic User Data section).
    - Click **Approved** to approve a patron.
    - Click **Blocked** to block a patron. If your library uses WorldShare Circulation, note that the conditions (such as number of overdue items or amount of fines/fees) your library may have configured to automatically block Circulation transactions will not block a patron from submitting an ILL request. Blocking an ILL patron is a manual transaction performed by staff.
    - Note that although staff may view patron communication preferences (Send Updates, Send Email Updates, Send SMS Updates), only the patron may edit these preferences.
    - Click **Save** to save edits, or click Cancel to abandon changes.