

Using Tipasa automation for mailing to home “on demand”

It's likely that some or all your patrons need items to be delivered to their homes. Tipasa automations can help! Use automated tagging of requests and the document delivery module to easily set up and provide home delivery.

Here we describe the setup and workflows for mailing specific items to a home or office address at the patron's request. For details about mailing to home for specific types of patrons, see [Using Tipasa automation for mailing to home based on patron type/status](#).

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Edit Patron Request Workforms

Include patron address fields

Ensure workforms used by patrons to request items they may need to have mailed (e.g., **book** and **other**) include all address fields.

These five values must be included:

- Address 1
- City
- State/Province
- Country (optionally select a default value)
- Postal Code
- If address information is included in the patron record, these values will auto-populate when the patron opens a request form

Add “Do you want this mailed to your home?”

To allow patrons to specify that they'd like a requested item to be mailed, you can repurpose the **Department** field because it can be used as a match criterion for automation.

Change the **Field Label** for Department to ask **Do you want this mailed to your home?** You may also wish to check the **Required** box.

Department	dropdown	Do you want this mailed to your home?	-- click to view/edit values --	<input checked="" type="checkbox"/> required
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In the drop-down box for **Field Values**, leave the top line blank, and then enter **Yes mail to home** on the first line and **No I will pick up** on the second line. Click **Done** and save your changes.

Edit the Department field

Type: Dropdown Box

Enter the values (one per line). The first value will be the default value. Leave the first line blank if you do not want a value to be selected by default.

Yes mail to home
No I will pick up

Done Cancel

Automatically tag requests for mailing to home

Automated Request Manager can automatically tag requests for mailing to home based on the patron's status.

In OCLC Service Configuration, under **WorldShare ILL**, click **Automated Request Manager**. Add a new automation that will identify requests that should be mailed to a patron's home.

We want to hear your thoughts on the new Automated Request Manager. [Feedback](#)

Borrowing New Request

These standard actions are done for all Borrowing New Requests, regardless of profile:

Bibliographic record Best matching bibliographic record applied to request	US Copyright Management Configurable under Advanced Workflows
WorldCat holdings check Available when holdings set in WorldCat	OPAC holdings check Configurable under Advanced Workflows
Knowledge base holdings check Available when OCLC knowledge base holdings set in WorldCat	Patron approval check Configurable under Patron Settings
Custom Holdings Group check Available when Custom Holdings Group holdings set in WorldCat	RapidILL holdings check Configurable under External System Settings
	Notifications Configurable under Notifications

Main Automations

Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

[+ Add New](#)

Name the automation (e.g., MAILTOHOME) and assign it a priority. Make sure to prioritize this automation so that it comes before any automations that perform more general actions.

Under **Matches**, select **Patron Department** and specify **Yes mail to home** in the text box. This value needs to be entered exactly as it exists on your Patron Request Workforms.

Note: Do not include a comma in your Patron Department value. The free text box matches on comma separated values.

Required fields are marked with an asterisk *

***Name**
MAILTOHOME

***Priority** ⓘ
1

Matches
Patron Departments Yes mail to home
Comma separated values.

Under **Actions**, select **Add Request Tag** and specify the tag you would like to use (e.g., mail to patron). You can either use an existing tag or create a new one for this purpose. If adding a new tag, be sure to tap Enter before moving away from the text box. The tag you select or add should appear in the box with a blue background.

If you are mailing borrowed items to patrons' homes as well as items from your own collection, you can add an action either to **Build the Lender String** (which will add a lender string from your Custom Holdings Path and put the request in review) or **Send Request to Lenders** (which will send the request unmediated to lenders in your specified Custom Holdings Path).

Finally, **Save** your automation.

Actions

Route Request to Review
Build Lender String
Add Request Tags
mail to patron

Minimum Lenders 1 Custom Holdings Path NEWPATH

Exceptions

Save **Cancel**

It will appear in your list of automations in Priority order.

Name	Matches	Actions	Priority
MAILTOHOME	Patron Department(s): Yes mail to home	Route Request to Review. Build Lender String if at least 1 lender(s) from Custom Holdings Path NEWPATH hold(s) the item. Request Tags: mail to patron	1

Mail requests to home

For items in your own collection

In your **New for Review** queue, you will see requests tagged with **mail to patron** (or whatever you specified for your tag).

Borrowing Requests: New For Review (32)							
ID	Status	Media Type	Title	Patron	Date Requested	Need Before	Tags
204298133	Not Reviewed		Handbook of attachment : theory, research, and clinical applications /	Katt, Stella	09/09/2020	12/12/2020	mail to home
204254759	Not Reviewed		Journal of personality and social psychology.	Rosenfeld-Jones, Ronan	09/04/2020	12/20/2020	
204254734	Not Reviewed		Homepage usability_ 50 websites deconstructed /	Miller, Thomas	09/04/2020	12/20/2020	mail to home
204224876	Not Reviewed		The psychology of Joss Whedon : an unauthorized exploration of Buffy, Angel, and Firefly /	Rosenfeld, Jenny	09/02/2020	09/26/2020	
204224861	Not Reviewed		Flourishing : positive psychology and the life well-lived /	Explorer, Neil	09/02/2020	12/20/2020	mail to home

Open each request to determine if it is held by your library. If it is, you will see a green check mark with **Held by my library** near the top right of the request.

The screenshot shows a library request detail page for item ID 205090549. At the top, there are buttons for 'Send Request', 'Change Fulfillment Type', and 'Cancel Request'. To the right is a toolbar with 'Apply constant data: Actions' dropdown, 'Note', 'Mark as Reviewed', 'Save', 'Reset', 'Email', and 'Print Now' buttons. Below the toolbar, tabs for 'Request', 'Purchase', and 'Staff Notes' are visible. Under 'Request Details', it shows 'Patron Summary', 'Source: PATRON', 'Status: Not Reviewed', and 'Title / Journal: The emperor of all maladies : a biography of cancer /'. On the right side, there is a section for 'Local ID' with a green checkmark and the text 'Held by my library'. Below this is an 'Open Access' section stating 'No links found'.

Manually route the request to **Document Delivery** by using the **Change Fulfillment Type** option at the top of the request.

The screenshot shows the same request detail page. The 'Change Fulfillment Type' button is highlighted with a purple box. A dropdown menu is open, showing options: 'Document Delivery' (which is selected and highlighted with a purple box), 'Open Access', 'Purchase Request', and 'WMS Acquisitions'. Other buttons like 'Send Request', 'Cancel Request', and 'Apply cons' are also visible.

At the top right of the request, click **Print Now**. This will print a full request slip with Call Number as well as patron information (name, email, phone, and mailing address) included.

The screenshot shows the top right corner of the request detail page. The 'Print Now' button is highlighted with a purple box. Above it is a toolbar with 'Apply constant data: Actions' dropdown, 'Note', 'Mark as Reviewed', 'Save', 'Reset', 'Email', and another 'Print Now' button. The 'Print Now' button in the toolbar is also highlighted with a purple box.

STATUS Not Received	TYPE Loan	OCLOC ID 66534160	REQUEST DATE 10/06/2020	NEED BEFORE 11/06/2020		DUE DATE 205090549	
BIBLIOGRAPHIC INFORMATION						DATE REQUESTED	
AUTHOR: Siddhartha Mukherjee		ARTICLE AUTHOR					
TITLE: The emperor of all maladies: a biography of cancer		ARTICLE TITLE					
/		FORMAT: Book					
IMPRINT: Dorset, Ga.: Cengage Learning, 2010		EDITION: Large printed.					
ISBN: 9781411044758		VOLUME NUMBER:					
		DATE:					
		PAGES:					
INTERLIBRARY LOAN INFORMATION							
VERIFIED: source unknown	COPYRIGHT: Signature Required						
MAX COST: 0.00 USD	SHIPPED DATE:						
LEND CHARGES:	FAX NUMBER:						
LEND RESTRICTIONS:	EMAIL: rcsenf@oclc.org						
	ODYSSSEY						
	ARIEL FTP						
	ARIEL EMAIL						
BILL TO:	6555 KILGOUR PLACE						
	DUBLIN, OH, US 43017						
PATRON INFORMATION							
PATRON ID: rcsenf4	PATRON NAME: Resterkid, Jerry						
PATRON STATUS: Student	PATRON ADDRESS: 42 Valley Way						
PATRON PHONE: +1 614-219-2152	Sydney, OH, US 43332						
PATRON FAX:	PATRON DEPARTMENT: Yes, mail to home						
PATRON EMAIL: rcsenf@gmail.com	PICKUP LOCATION:						
SHIPPING INFORMATION							
SHIP VIA: Library Mail	RETURN VIA:						
SHIP TO:	RETURN TO:						
6555 KILGOUR PLACE							
DUBLIN, OH, US 43017							

On the printout, the **Patron Information** section includes the patron's mailing address. Use this information for shipping the item. You can then either mark the request complete and manage the checkout in your local circ system only or keep it open in ILL until it is returned.

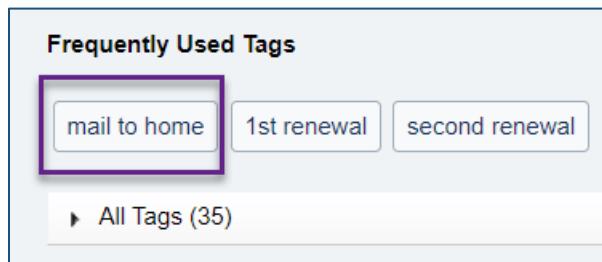
For items borrowed from other libraries

In your **In Transit** queue, you will see the **mail to home** tags. The patron's full mailing address will be included on the request printout, as above, so that you may mail the item without needing to look up the address separately.

Note: If automation is not sending requests direct to lenders, you may wish to specifically send them to lenders with a long loan period. The OCLC Profiled Group **LONG** is helpful for this and includes lenders with loan periods of 12 weeks or longer.

Export a list of requests to print mailing labels

If you prefer to use custom mailing label templates, you can export a list of all requests that should be mailed to home. From the Tipasa home page, click the **mail to home** tag to retrieve active requests with that tag.

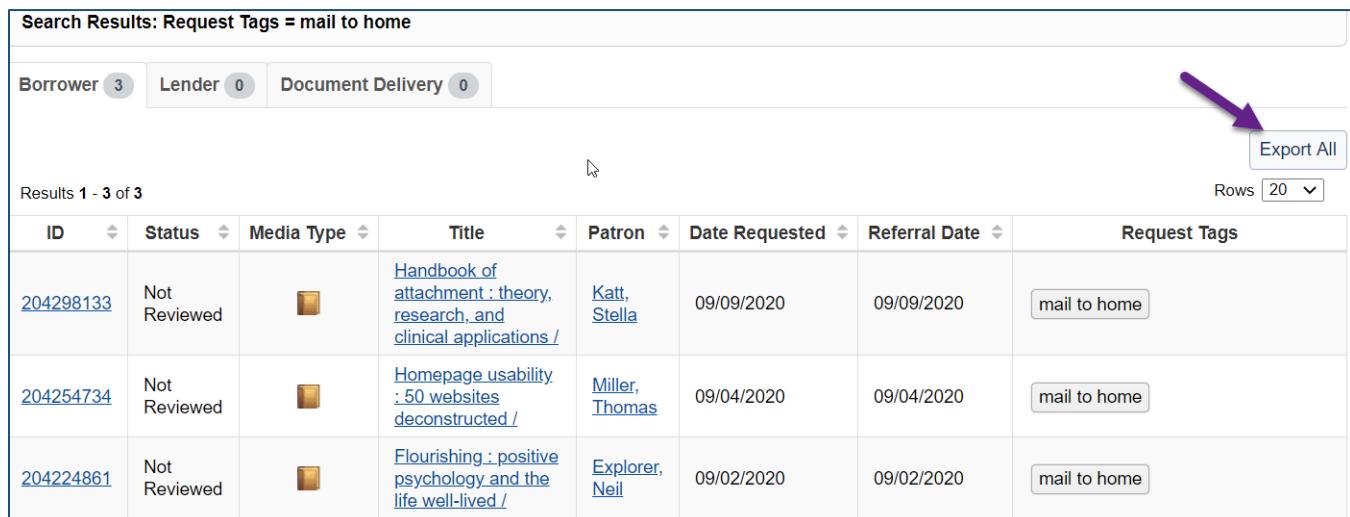


Frequently Used Tags

mail to home 1st renewal second renewal

▶ All Tags (35)

Then use the **Export All** function to create a .csv file of data about the requests.



Search Results: Request Tags = mail to home

Borrower 3 Lender 0 Document Delivery 0

Results 1 - 3 of 3

Export All

Rows 20

ID	Status	Media Type	Title	Patron	Date Requested	Referral Date	Request Tags
204298133	Not Reviewed		Handbook of attachment : theory, research, and clinical applications /	Katt, Stella	09/09/2020	09/09/2020	mail to home
204254734	Not Reviewed		Homepage usability : 50 websites deconstructed /	Miller, Thomas	09/04/2020	09/04/2020	mail to home
204224861	Not Reviewed		Flourishing : positive psychology and the life well-lived /	Explorer, Neil	09/02/2020	09/02/2020	mail to home

Using mail merge, you can print custom mailing label – both mailing labels for sending items to your patrons and return labels for patrons to send items back.

Questions?

If you have questions about the setup or workflows, or would like additional information, please contact [OCLC Support](#).