

# 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?”

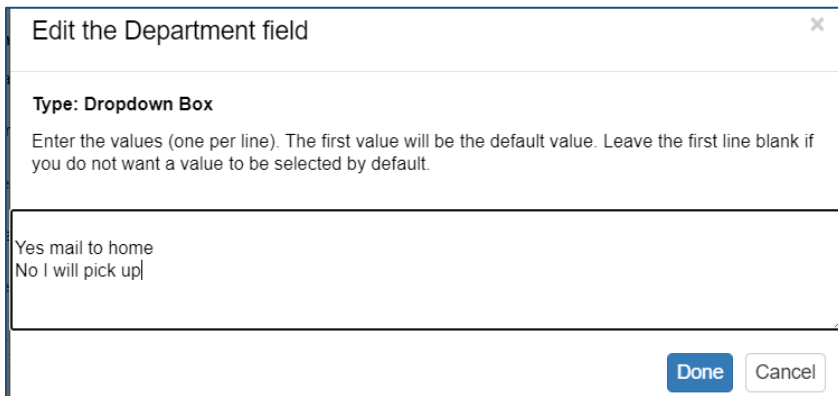
To allow patrons to specify that they’d like a requested item to be mailed, you can repurpose the **Department** field because it can be used as a match criterion for automation.

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.



A configuration bar for the 'Department' field. It shows 'Department' in a dropdown menu, followed by 'dropdown' as the field type. The field label is 'Do you want this mailed to your home?'. To the right, there is a link to view/edit values and a checked 'required' checkbox.

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.

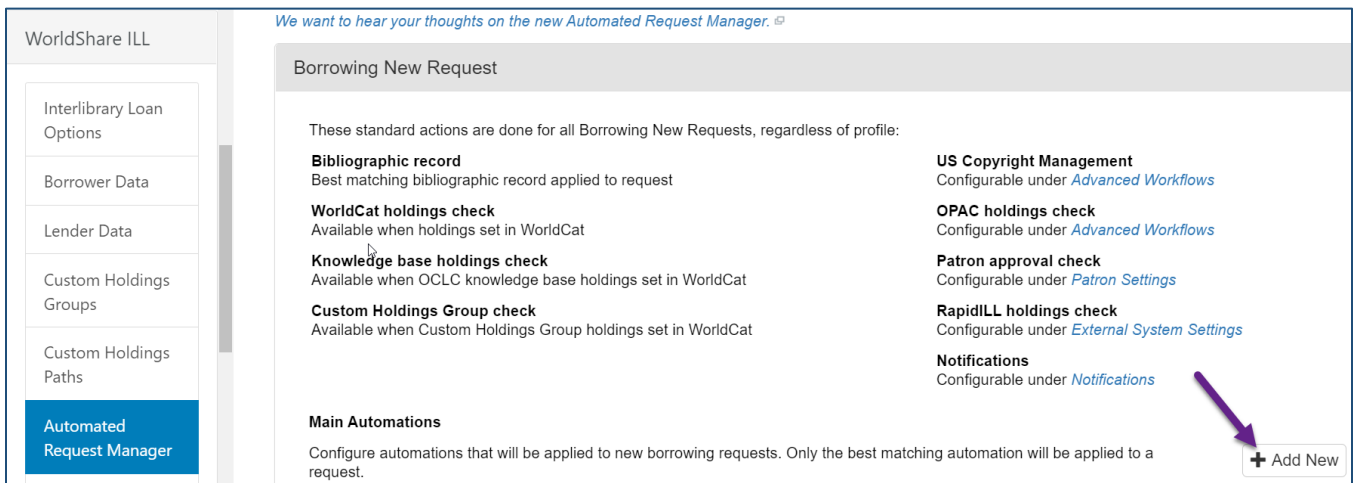


A dialog box titled 'Edit the Department field'. It indicates the field type is 'Dropdown Box' and provides instructions: 'Enter the values (one per line). The first value will be the default value. Leave the first line blank if you do not want a value to be selected by default.' The input area contains two lines: 'Yes mail to home' and 'No I will pick up'. At the bottom right are 'Done' and 'Cancel' buttons.

## 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.



A screenshot of the 'Automated Request Manager' configuration page. The left sidebar shows 'WorldShare ILL' with a menu including 'Interlibrary Loan Options', 'Borrower Data', 'Lender Data', 'Custom Holdings Groups', 'Custom Holdings Paths', and 'Automated Request Manager' (highlighted). The main content area is titled 'Borrowing New Request' and lists standard actions: 'Bibliographic record', 'WorldCat holdings check', 'Knowledge base holdings check', 'Custom Holdings Group check', 'US Copyright Management', 'OPAC holdings check', 'Patron approval check', 'RapidILL holdings check', and 'Notifications'. Each action has a link to its configuration page. At the bottom right, a purple arrow points to a '+ Add New' button.

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**

**\*Priority** ⓘ

**Matches**

Patron Departments  ⓘ

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  ⓘ


+ Add an Action

**Exceptions**

+ Add an Exception

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 \(32\)](#)

Results 1 - 20 of 32 

Rows     

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

[Export All](#)

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.

205090549: The emperor of all maladies : a biography of cancer /

Send Request Change Fulfillment Type Cancel Request

Apply constant data: Actions: Note Mark as Reviewed Save Reset Email Print Now

Request Purchase Staff Notes 0

Request Details (Request ID 205090549)

Patron Summary

Source PATRON

Status Not Reviewed

Title / Journal The emperor of all maladies : a biography of cancer /

Held by my library

Local ID

Open Access  
No links found

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

205090549: The emperor of all maladies : a biography of cancer /

Send Request Change Fulfillment Type Cancel Request

Apply constant data: Actions

Request Purchase

Request Details (Request ID 205090549)

Patron Summary

Document Delivery

Open Access

Purchase Request

WMS Acquisitions

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.

Apply constant data: Actions:

Note Mark as Reviewed Save Reset Email Print Now

STATUS Not Reviewed	TYPE Loan	OCLC# 20541623	205090549
SOURCE	REQUEST DATE 10/28/2020	NEED BEFORE 11/08/2020	DUE DATE
PATRON	RECEIVE DATE		
BORROWER			
NOVOC			
LENDERS			

BIBLIOGRAPHIC INFORMATION	
AUTHOR Siddhartha Mukherjee	ARTICLE AUTHOR
TITLE The Emperor of All Maladies: a biography of cancer	ARTICLE TITLE
IMPRINT Detroit : Gale, Cengage Learning, 2012	FORMAT Book
ISBN 9781410447152	EDITION Large print ed.
	VOLUME NUMBER
	DATE
	PAGES

INTERLIBRARY LOAN INFORMATION	
VERIFIED source unknown	AFFILIATION Signature Required
MAX COST 0.00 USD	SHIPPED DATE
LEND CHARGES	FAX NUMBER
LEND RESTRICTIONS	EMAIL rosean@oclc.org
	ODYSSEY ARIEL FTP
	ARIEL EMAIL
	BILL TO 6665 KILGOUR PLACE DUBLIN, OH, US 43017

PATRON INFORMATION	
PATRON ID rosean@	PATRON NAME Rosean, Jenny
PATRON STATUS Student	PATRON ADDRESS 42 Walaby Way Sydney, OH, US 43323
PATRON PHONE +1 626-219-5353	
PATRON FAX	PATRON DEPARTMENT Yes, mail to home PICKUP LOCATION
PATRON EMAIL jacobk@oclc.org	

SHIPPING INFORMATION	
SHIP VIA Library Mail	RETURN VIA
SHIP TO 6665 KILGOUR PLACE DUBLIN, OH, US 43017	RETURN TO

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.

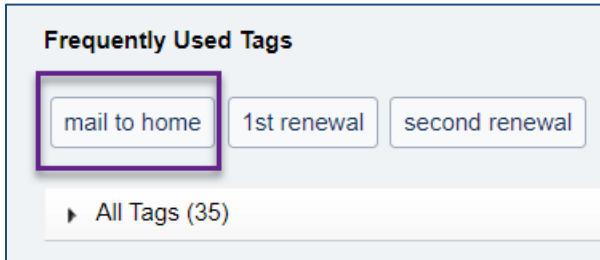
## For items borrowed from other libraries

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.



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 Rows 20

Export All

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