

Using Tipasa automation for mailing to home based on patron type/status

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 items to a home or office address for all patrons of a specific type/status (e.g., faculty, graduate student). For details about mailing to home at the patron's request, see [Using Tipasa automation for mailing to home "on demand"](#).

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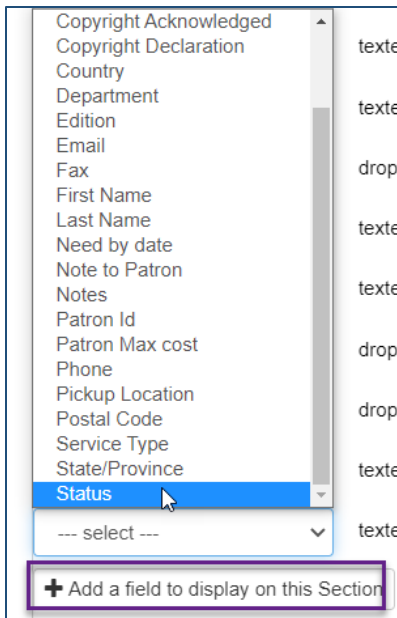
Edit Patron Request Workforms to include address and status fields

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.

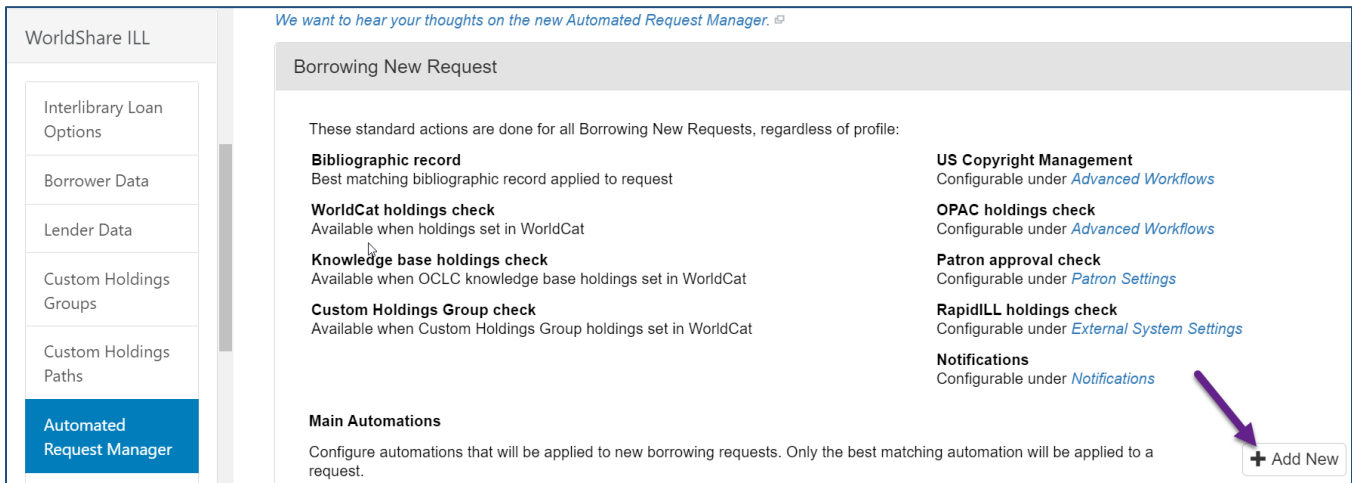


Also ensure the **Status** field is on your request forms. If the patron record includes ILL Patron Type, the value will auto-populate when the patron opens a request form.

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.



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 Statuses** and specify the patron types that should automatically receive the mail to home service.

Required fields are marked with an asterisk *

***Name**

***Priority** ⓘ

Matches

Patron Statuses ▾ Faculty, Graduate ⊖

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 ▾ Minimum Lenders 1 ▾ Custom Holdings Path NEWPATH ▾ ⊖

Add Request Tags ▾ mail to patron x ⊖


+ 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 Status(es): Faculty, Graduate	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 <input type="button" value="Edit"/> <input type="button" value="Delete"/>






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
204298133	Not Reviewed		Handbook of attachment : theory, research, and clinical applications /	Katt, Stella	09/09/2020	12/12/2020	<input type="button" value="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	<input type="button" value="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	<input type="button" value="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.

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 /

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: Note Mark as Reviewed Save Reset Email Print Now

Request Purchase Staff Notes 0

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 Returned	TYPE Loan	OCLC# 85534800	2009090549
SOURCE	REQUEST DATE 10/26/2020	ISSUED BEFORE 11/04/2020	DUE DATE
BIBLIOGRAPHIC INFORMATION			
AUTHOR: Siddhartha Mukherjee		ARTICLE AUTHOR	
TITLE: The Emperor of all maladies : a biography of cancer		ARTICLE TITLE	
IMPRINT: Deyrick, Galk, Ganga Learning, 2012		FORMAT: Book	
ISBN: 9781410471159		EDITION: Large print ed.	
		VOLUME NUMBER	
		DATE	
		PAGES	
INTERLIBRARY LOAN INFORMATION			
VERIFIED: source unknown		AFFILIATION	
MAX COST: 0.00 USD		COPYRIGHT: Signature Required	
LEND CHARGES		SHIPPED DATE	
LEND RESTRICTIONS		FAX NUMBER	
		EMAIL: rose@oclc.org	
		CDS/ISSY	
		ARISE FTP	
		ARISE EMAIL	
		BILL TO	
		8585 KILGOUR PLACE DUBLIN, OH, US 43017	
PATRON INFORMATION			
PATRON ID: rose@oclc.org		PATRON NAME: Rose@oclc, Jenny	
PATRON STATUS: Student		PATRON ADDRESS: 42 Oakley Way	
PATRON PHONE: +1 626-219-2322		Sydney, OH, US 42322	
PATRON FAX:		PATRON DEPARTMENT: Yes, mail to home	
PATRON EMAIL: rose@oclc.org		PICKUP LOCATION:	
SHIPPING INFORMATION			
SHIP VIA: Library Mail		RETURN VIA	
SHIP TO:		RETURN TO:	
8585 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 Rows 20

Export All

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 labels – 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](#).