

Tipasa Authentication/Patron Load: WMS Libraries

OCCLC's Tipasa Implementation Team

Topics Covered

- Authentication
- Changes to Patron Load files
- Login Experience
- Next steps for Authentication/Patron Load

WMS Libraries - Authentication

- Your existing authentication method and patron database will be used
- No changes are needed to your existing authentication setup
- If you would like to make a change to your authentication method, we can help you do so now

Changes to your existing patron load

- 4 new ILL-related fields to include (although only 1 is required)
 - illId (required)
 - illApprovalStatus (optional)
 - illPatronType (optional)
 - illPickupLocation (optional)
- Documentation available at <http://bit.ly/patrondata>

New ILL-related fields for patron load: illID

- illID (required)
 - needs to be a unique value, unlikely to change
 - you can use the same value you use for either idAtSource or username if desired
 - some libraries use this opportunity to supply an additional value here, like student ID number
 - searchable field in WMS

New ILL-related fields for patron load: illApprovalStatus

- illApprovalStatus (optional)
 - Supported values are: New, Approved, Blocked
 - Allows libraries to pre-approve or block patrons for Tipasa via the patron load or change patrons' approval status for Tipasa
 - If left blank on initial load where there is also an illId value in the record, patron will be set to “New” by default
 - Libraries can decide whether to require patrons be approved to place ILL requests (setting in service configuration)
 - If approvals are not required, patrons with “New” status function as Approved

New ILL-related fields for patron load: illPatronType

- illPatronType (optional)
 - Not currently linked to Patron Type in WMS
 - Automatically populates the Status field on the Patron Request Workforms
 - You can use the same value as borrowerCategory OR
 - Use a value you want to use for ILL statistics (if that differs from borrowerCategory values)

New ILL-related fields for patron load: illPickupLocation

- illPickupLocation (optional)
 - Not currently connected to home location in patron record
 - Can allow you to record a value for a patron's current campus location affiliation if desired –recorded in the ILL portion of the patron record
 - Will not prepopulate patron request forms

Login Experience

- Your patrons will see the same login screen appearance for the Tipasa patron portal as they do now for their “My Account.”
- The 2 are accessed at 2 different URLs:
 - WMS: <https://yourlib.on.worldcat.org/myaccount>
 - Tipasa: <https://yourlib.account.worldcat.org/profile>
- Staff will login exactly the same way they do now and then click the **Interlibrary Loan** tab to access Tipasa.

Next Steps for Authentication

- Contact implementation@oclc.org when you are ready to submit a new patron load file with the ILL-related fields
- Documentation for patron load is available here: <http://bit.ly/patrondata>
- Once you are ready to send a file, drop it in your **wms/test/in/patron** directory, **even if your library is already sending patron files on a regular basis**
- We will ask our data load team to review your first file with ILL fields before loading it to production

Thank you!

implementation@oclc.org

**Because
what is
known must
be shared.®**