Tipasa Authentication/Patron Load: WMS Libraries

OCLC’s Tipasa Implementation Team
Topics Covered

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

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.