### Agenda for this afternoon

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Speaker(s)</th>
</tr>
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<tbody>
<tr>
<td>1:40-1:50</td>
<td>Introduction of Tipasa</td>
<td>Alena Miller</td>
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<td></td>
<td>Approach to building Tipasa</td>
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<tr>
<td>1:50-2:00</td>
<td>Implementation of Tipasa</td>
<td>Jenny Rosenfeld</td>
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<td>2:00-3:00</td>
<td>Demo &amp; High-Level Roadmap</td>
<td>Jennifer Corsi</td>
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<td>3:00-3:15</td>
<td>Break</td>
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<tr>
<td>3:15-4:00</td>
<td>Panel Discussion</td>
<td>Kurt Munson, Barb Chen, Heidi Nance, Teva Hutchison, Hui Sheng</td>
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<tr>
<td>4:00-4:30</td>
<td>Q &amp; A with OCLC staff</td>
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Introducing Tipasa™

The world’s first cloud-based ILL management system
Key benefits of Tipasa

- Cloud-based, no need for IT support
- Patron interface built with responsive design
- Easy to train new staff and student workers
- Automate routine requests so that your staff can work on the difficult ones
Where we are today
Community engagement

• Interviews and observations
  – Site visits
  – WebEx
• Usability testing
• Advisory group
• Early adopters
User research

• Abilene Christian University
• Albany Law School
• Asbury Theological Seminary
• Atlanta University Center
• Carnegie Mellon
• Christopher Newport University
• Clemson University
• Columbia University
• CUNY Graduate Center
• Denison University
• DePaul University Library
• DePaul University Library
• East Tennessee State University
• Emory University
• Franklin & Marshall College
• George Mason
• Getty Research Institute
• Hampton University
• Harvard University
• Hudson Valley Community College
• Indiana University-Purdue University
  Indianapolis
• Iowa State University Parks Library
• Ithaca College Library
• Johnson County Library
• Kenyon College
• LeRoy Collins Leon County Public Library System
• Northwestern University
• Occidental College
• Ohio State University
• Ohio State University Health Sciences
• Ohio Wesleyan University
• Pikes Peak Library District
• Purchase College Library – SUNY
• Rivier University Regina Library
• St. Catherine University
• St. John Fisher
• SUNY Poly
• The Citadel
• Univ of Colorado Health Sciences Library
• University of Delaware
• University of North Carolina-Chapel Hill
• University of Cincinnati
• University of Connecticut
• University of Delaware Library
• University of Kentucky
• University of Michigan
• University of Nevada, Las Vegas
• University of Pittsburgh
• University of South Florida
• University of Washington
• University of Wisconsin
• University of Pennsylvania
• Virginia Commonwealth University
• Washington State University Vancouver
• Wayne State University
• Westchester Library System
Phase 1 advisory group members

- Jennifer Acker, Hudson Valley Community College
- Tina Baich, IUPUI University Library
- Margaret W. Ellingson, Emory University
- Jade Erickson, St. Catherine University
- John de La Fontaine, Occidental College
- Megan Gaffney, University of Delaware
- Brittany Heer, Univ of Colorado Health Sciences Library
- Geneva Holliday, Univ of North Carolina at Chapel Hill
- Teva Hutchinson, Atlanta Univ Center, Robert W. Woodruff library
- Holly Klump, Rivier University Regina Library
- Aimee Lind, Getty Research Institute
- Carrie Marten, Purchase College Library – SUNY
- Meg Massey, Franklin & Marshall College
- Dawn Mick, Iowa State University Parks Library
- Kurt Munson, Northwestern University
- Heidi Nance, University of Washington
- Shannon Pritting, SUNY Poly
- LeEtta Schmidt, University of South Florida
- Hui Sheng, Westchester Library System
- Kari Sime, Johnson County Library
Early adopters

Alabama A&M University • Albright College • Arkansas State University • Asbury Theological Seminary • Ashford University
Atlanta University Center • Bellarmine University • Borough of Manhattan Community College • Boyd County Public Brooklyn Law School
Caldwell University • Central New Mexico Community College • Christendom College • Clark Art Institute • Clarke University • College of Wooster
Cornerstone University • Daemen College • Eastern Mennonite University • Eastern Washington University • Fuller Theological Seminary
George Washington University Law • Hampden-Sydney College • High Plains Library District • Horry County Memorial Library • Immaculata University
Indiana University East • Indiana University Kokomo • John Carroll University • Joliet Junior College • Juneau Public • Kenyon College
Lenoir-Rhyne University • Lexington Public • Linfield College • Lynchburg College • Manhattan College • Marist College
Mitchell Hamline School of Law • Montclair State University • National Renewable Energy Laboratory • North Central College • Northwestern College
Ohio Wesleyan University • Palos Verdes Library District • Phoenix Public • Point Loma Nazarene University • Sacred Heart University
Saint Thomas University • Saint Xavier University • Schaumburg Township District Library • Shenandoah University • South Texas College of Law
Springfield College • St. Edward’s University • Stevenson University • Texas A&M International University • Texas A&M University-Commerce
Trinity International University • Tulsa Community College • University of Arkansas Fort Smith • University of Central Missouri
University of Minnesota Duluth • University of Montevallo • University of Saint Francis • Ursinus College • Virginia Wesleyan College
Viterbo University • Washington & Lee University • Washington University Law • West Virginia Library Commission
West Virginia Wesleyan College • Western Illinois University • Western Kentucky University • Wheaton College • William James College
Early adopter program
ILLiad libraries

Total libraries: 1200
- Public: 60
- Special: 50
- Small academic: 400
- Medium academic: 400
- Large academic: 350

Breakdown of ILLiad libraries:
- Public
- Special
- Small academic
- Medium academic
- Large academic
Early adopters: small academics and publics

2016

2017

SEPTEMBER

Small academics and publics

Rapid users and medium academics

2018

Large academics and Docline users

2019 & beyond
Phase 1 early adopter program

• In Summer 2016
  – We invited ~375 libraries to participate
  – Those libraries are using ILLiad ‘out of the box’
• First cohort began Sept 1 2016
• To date, 75+ libraries have committed to the Phase 1 early adopter program and 25+ are fully live on Tipasa
• We continue to recruit libraries to join the program
What does early adopter mean?

An early adopter is committing to join a cohort of libraries that will:

– Provide us with feedback on the service and the implementation process and suggest enhancements
– Participate in an 8-week implementation program
– Go live with the new service at the end of the program
– Switch off their ILLiad implementation
Early adopter program

Targeted, invitation-only libraries

Multi-step process:

✓ E-mail invitation
✓ Survey to determine ILLiad use
✓ Ask Us session with product managers
✓ Demo of Phase 1 functionality
✓ Pricing, early adopter agreement, license
Implementation
Implementation Overview

• 8-week process
  – Program is presented in its entirety over the course of the first month, so libraries could be finished in as little as one month
  – WMS libraries often finish faster – patron authentication is already set up for them
  – Libraries can re-attend live training, cohort sessions, or office hours again during the second month of implementation at any time
# 8-week migration process

<table>
<thead>
<tr>
<th>WEEK 1</th>
<th>WEEK 2</th>
<th>WEEK 3</th>
<th>WEEK 4</th>
<th>WEEK 5</th>
<th>WEEK 6</th>
<th>WEEK 7</th>
<th>WEEK 8</th>
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<tbody>
<tr>
<td>Attend Kickoff</td>
<td>Cohort Session 1: Core Tipasa</td>
<td>Cohort Session 2: Borrowing &amp;</td>
<td>Cohort Session 3: Going Live &amp;</td>
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<td>Cohort Session 2: Borrowing &amp;</td>
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<td>Functionality</td>
<td>Printing</td>
<td>ILLiad Shutdown</td>
<td>Functionality</td>
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Drop-in office hours – open to all cohorts to ask questions or request assistance from Implementation team

- Attend Training: Intro
- Attend Training: Advanced Lending Workflows
- Attend Training: Patron Management & Notifications
- Authentication/ Patron Load Session for IT Staff
- Attend Training: Copyright Management
- Attend Training: Document Delivery
- Authentication/ Patron Load Session for IT Staff
- Attend Training: Document Delivery
- Authentication/ Patron Load Session for IT Staff
Session types

- IT Authentication
- Kickoff
- Cohort sessions
- Training sessions
- Office hours
- Recorded training on specific topics
Iterative process

• Incremental and major changes as we continue through process, now in our fifth cohort
  – Authentication conversation moved to pre-implementation
  – Condensed cohort session material
  – Setting go-live for each library early in process
  – More support materials

• This means you get through implementation quickly and painlessly
Tipasa Implementation

Library Migration Planning Guide

Below you will find the migration planning guide, which includes a syllabus and calendars to guide your implementation, as well as links to activities checklists for your library to perform:

- Migration Planning Guide
- Migration Checklists
- Go-Live Checklist
- ILLiad Shutdown Procedures

Tipasa Session Registration Links

To register for the Tipasa sessions, please use the links below:

- Cohort sessions (Wednesdays at 2:00 PM Eastern)
- Office hours (Fridays at 2:00 PM Eastern)
- IT Authentication/Patron Load Sessions
  - Every other Monday, beginning 2/13 at 3:00 PM Eastern
  - Every other Thursday, beginning 2/16 at 11:00 AM Eastern
- Additional recorded sessions
  - Using Article Exchange with Tipasa
  - Tipasa Statistics Overview

Connect with fellow WorldShare users in the OCLC Community Center
# Tipasa Migration Syllabus

<table>
<thead>
<tr>
<th>WEEK</th>
<th>Sessions/Training to Attend</th>
<th>Activities to complete this week outside of training sessions</th>
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</table>
| 1    | **IT authentication session** (designed for your IT contact to learn about authentication and patron load)  
 **Kickoff session** (for library staff working with Interlibrary Loan) | **Create accounts for library staff who need to use Tipasa.** (WMS libraries just need to update roles on existing accounts)  
 **Edit your iLLiad pages** (headers of logon and logon2 pages and web alerts) to announce your library’s pending migration to a new ILL service  
 **Send your desired go live date range (1-week range) to implementation@oclc.org.** |
| 2    | **Cohort Session 1:** Core Tipasa Resource Sharing Functionality and creating catalog deep links  
 **Office hours:** (not required); drop in to ask any questions – open to all cohorts  
 **Training session 1:** Introduction to Tipasa | **Review your constant data records** (both borrower and lender) to correct any errors in formatting and/or delete unnecessary records.  
 **Set up a custom holdings list** with the symbols of all of the libraries in your cohort; symbols are available [here](#).  
 **Begin practice lending in Tipasa** using the custom holdings list of your cohort libraries  
 **Configure deep links to your catalog** so that lending staff can check item availability from the request details screen in Tipasa  
 **Configure notifications (lending library to borrowing library)** (WMS libraries: If you are handling overdue notices to borrowing libraries in WMS successfully, please continue to do so. You would not need to turn on automated overdue notices in Tipasa if you are using this workflow.) |
| 3    | **Cohort Session 2:** Borrowing and printing demos  
 **Training session 2:** Advanced Lending Workflows  
 **Training session 3:** Patron Management/Notifications  
 **Office hours** (not required); drop-in to ask any questions – open to all cohorts | **Enable advanced lending priorities, if desired** (to turn on sub-queues of verifying, retrieving.  
 **Configure a custom holdings list for your priority borrowers** in order to view their requests in a separate queue  
 **Configure lending priorities** using the custom holdings list for the priority borrower group(s) you created  
 **View the Article Exchange demo/recording for Tipasa**  
 **Set/change your preferred method of electronic delivery to Article Exchange** |
Implementation support

- Detailed migration plan
- Checklists
- Separate cohort sessions and office hours
- Support for IT staff
- Access to Community Center
- Recordings of all sessions
Demo & Roadmap
Patron UI

Notification service

Tipasa

WorldShare staff interface

Configuration service
Tipasa Demonstration
2016 2017 2018 2019 & beyond

SEPTEMBER
Early adopters: small academics and publics

Rapid users and medium academics

Small academics and publics

Large academics and Docline users
Current priorities: RapidILL integration for copies
Current priorities:
RapidILL integration for copies
Current priorities: Google search
Current priorities:
Attach document received via e-mail
Current priorities: Document Delivery reports

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<th>Average Document Delivery Filled Turnaround Time</th>
<th>Cancelled Request Count</th>
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Document Delivery Activity Summary

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<tr>
<td>Document Delivery Filled Count</td>
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<td>Average Document Delivery Filled Turnaround Time</td>
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<tr>
<td>Cancelled Request Count</td>
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Upcoming priorities

- Enhanced Article Exchange workflow
- Purchase options: Reprints Desk, Amazon, GOBI, etc.
- Additional search options: Serials Solutions (ProQuest 360 Core), EBSCO A-to-Z, HathiTrust, etc.
- Branch workflows – moving requests from location to location or within different units of the library
- Multiple authentication mechanisms
Upcoming priorities

• Continued user research including IDS libraries
• Circulation integration
• Lending request forms (requests coming from non-OCLC libraries)
• APIs
• DOCLINE integration
Exercise before break

• Sheets on table for each person with roadmap items
• Three dots per person; write your symbol on each
• Vote on roadmap items
• Fill out name, additional comments
Panel Discussion
Questions?
Sharing Breakthroughs
2017 OCLC Resource Sharing Conference

thank you