Agenda for this afternoon

1:40-1:50	Introduction of Tipasa Approach to building Tipasa	Alena Miller
1:50-2:00	Implementation of Tipasa	Jenny Rosenfeld
2:00-3:00	Demo & High-Level Roadmap	Jennifer Corsi
3:00-3:15	Break	
3:15-4:00	Panel Discussion	Kurt Munson, Barb Chen, Heidi Nance, Teva Hutchinson, Hui Sheng
4:00-4:30	Q & A with OCLC staff	

Introducing Tipasa™

The world's first cloud-based ILL management system

OCLC

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
- Denver Public 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

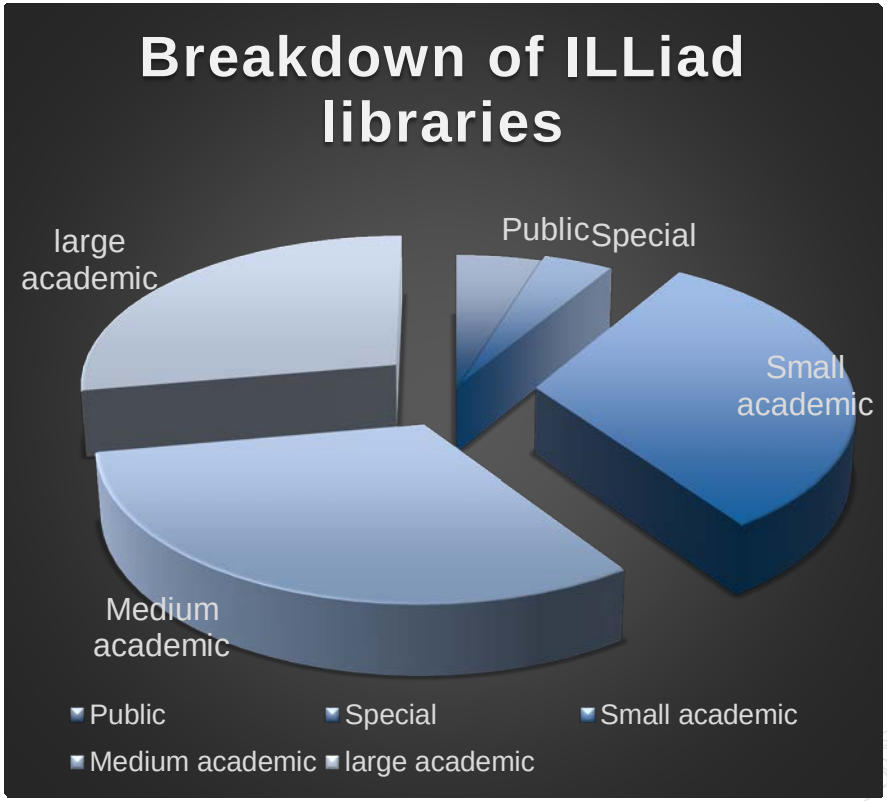
Early adopters

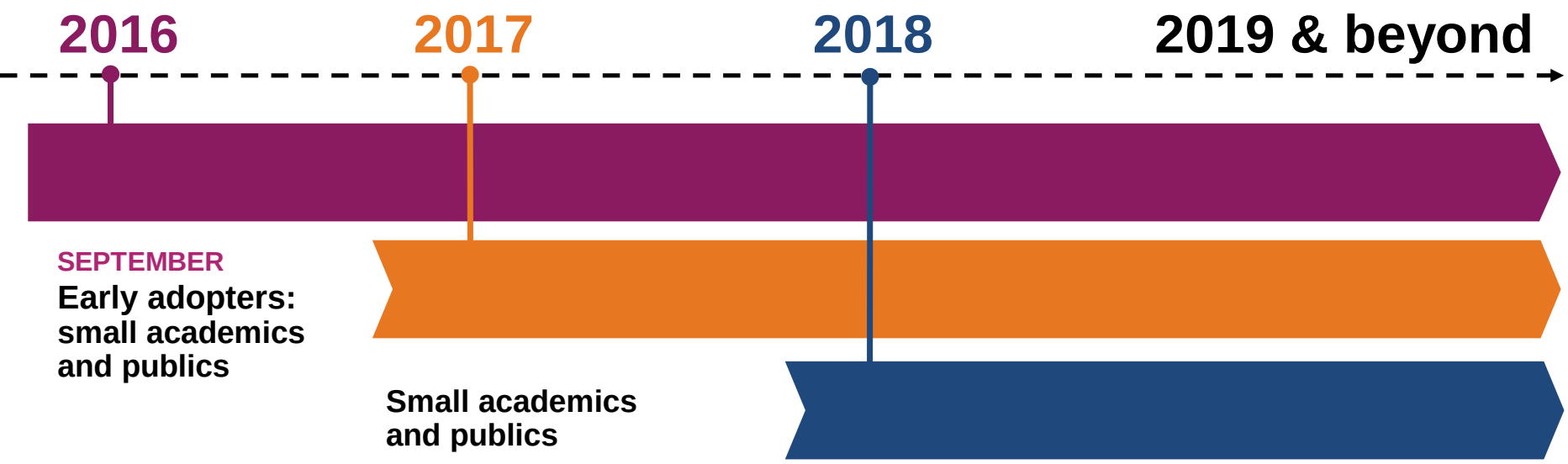
Alabama A&M University • Albright College • Arkansas State University • Asbury Theological Seminary • Ashford University
Atlanta University Center • Bellarmine University • Borough of Manhattan Community College • Boyd County Public Brooklyn Law School
Caldwell University • Central New Mexico Community 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




2016
2017
2018
2019 & beyond
SEPTEMBER
Early adopters: small academics and publics
Small academics and publics
Rapid users and medium academics
Large academics and *Docline* users

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

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

Sharing Breakthroughs
2017 OCLC RESOURCE SHARING CONFERENCE

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

WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6	WEEK 7	WEEK 8
Attend Kickoff	Cohort Session 1: Core Tipasa Functionality	Cohort Session 2: Borrowing & Printing	Cohort Session 3: Going Live & ILLiad Shutdown		Cohort Session 1: Core Tipasa Functionality	Cohort Session 2: Borrowing & Printing	Cohort Session 3: Going Live & ILLiad Shutdown
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: Copyright Management		Attend Training: Intro	Attend Training: Advanced Lending Workflows	Attend Training: Copyright Management
		Attend Training: Patron Management & Notifications	Attend Training: Document Delivery		Attend Training: Patron Management & Notifications	Attend Training: Document Delivery	
		Authentication/ Patron Load Session for IT Staff		Authentication/ Patron Load Session for IT Staff		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

Documentation

Training

Release Notes

Known Issues

Implementation

- Tipasa Authentication
- Cohort Recordings

Connect with fellow WorldShare users in the OCLC Community Center

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

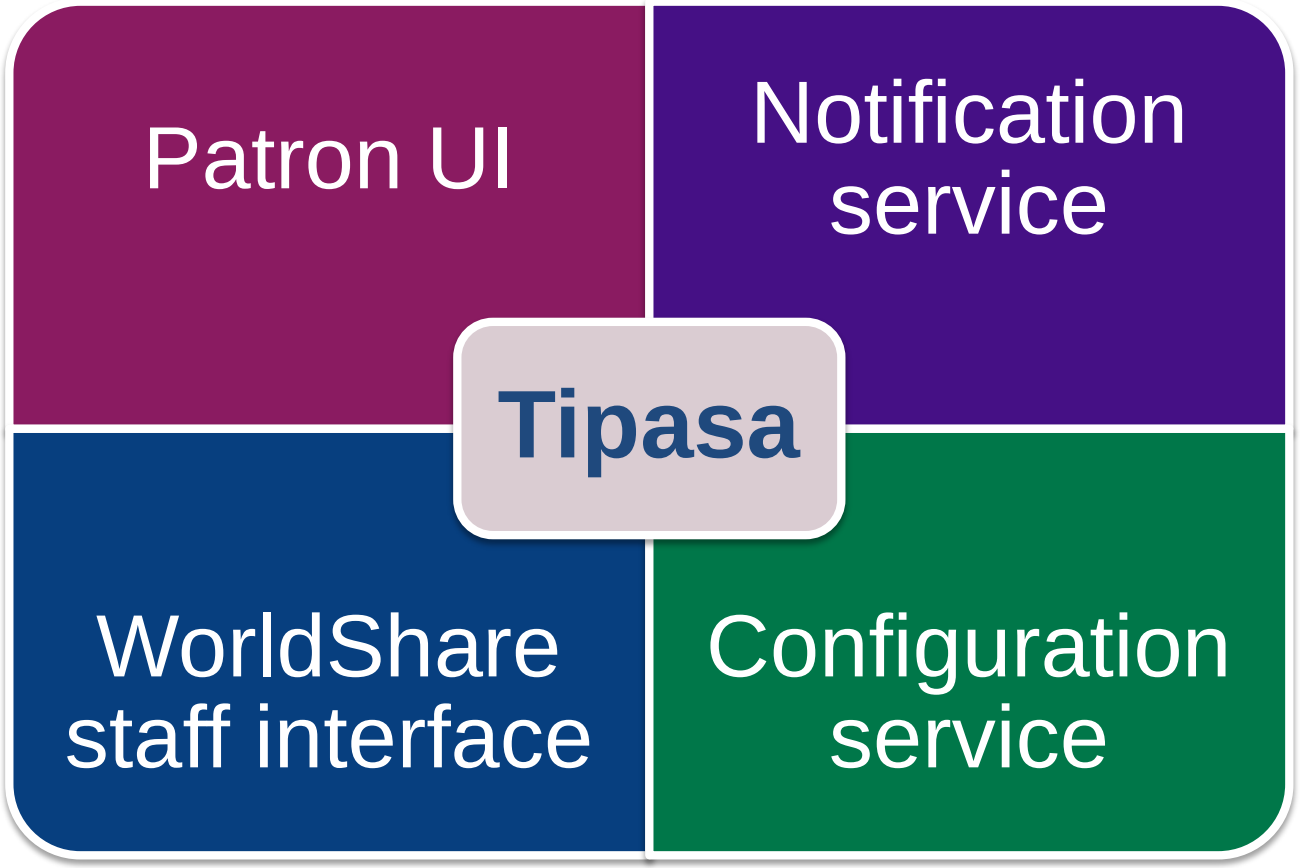
Tipasa Migration Syllabus

WEEK	Sessions/Training to Attend	Activities to complete this week outside of training sessions
1 (2/27-3/3)	• **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 (3/6-3/10)	• **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 group** with the symbols of all of the libraries in your cohort; symbols are available here. • Begin practice lending in Tipasa using the custom holdings group 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 group for your priority borrowers** in order to view their requests in a separate queue • **Configure lending priorities** using the custom holdings group 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

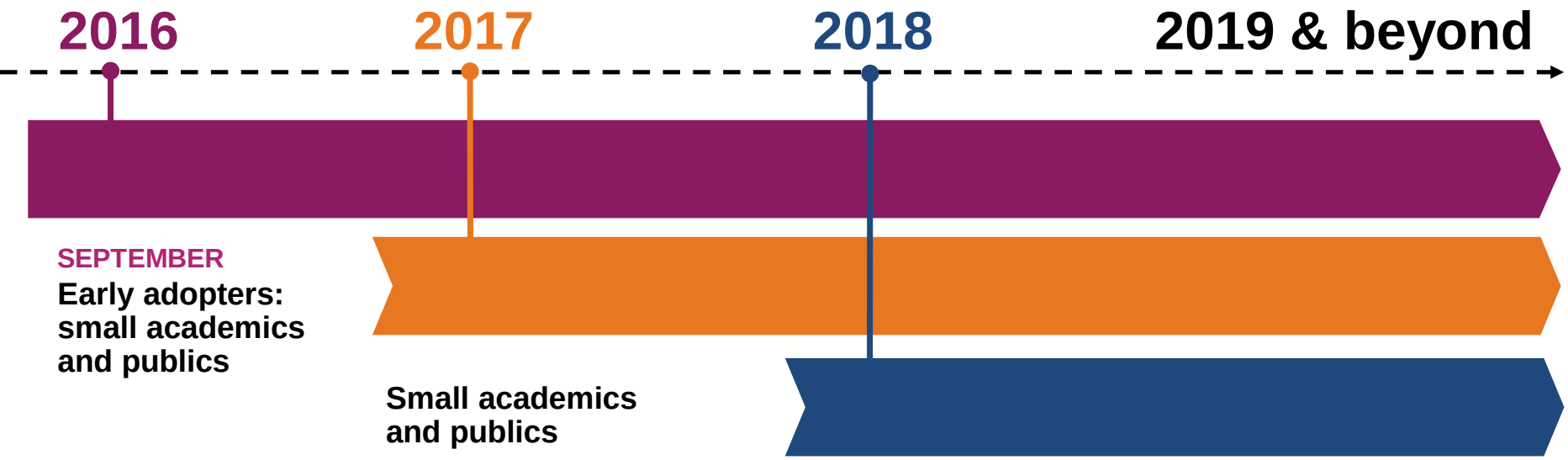
Implementation support

- 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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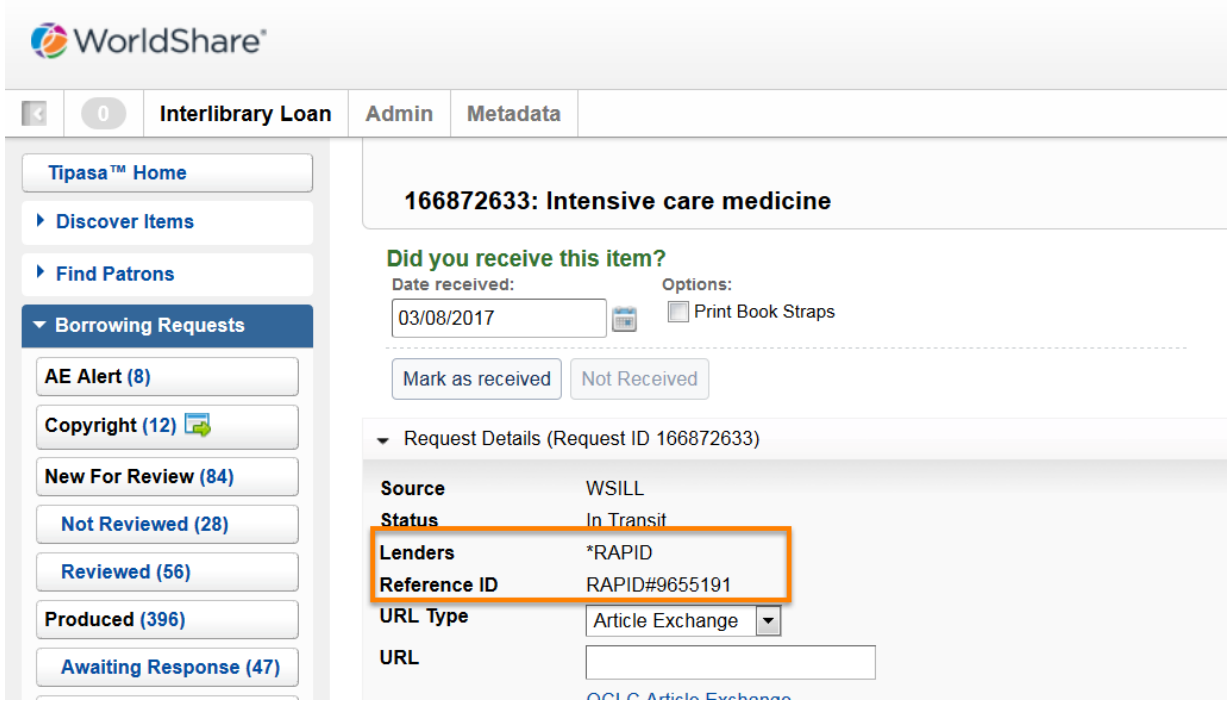
Rapid users and medium academics
Large academics and *Docline* users

Current priorities:

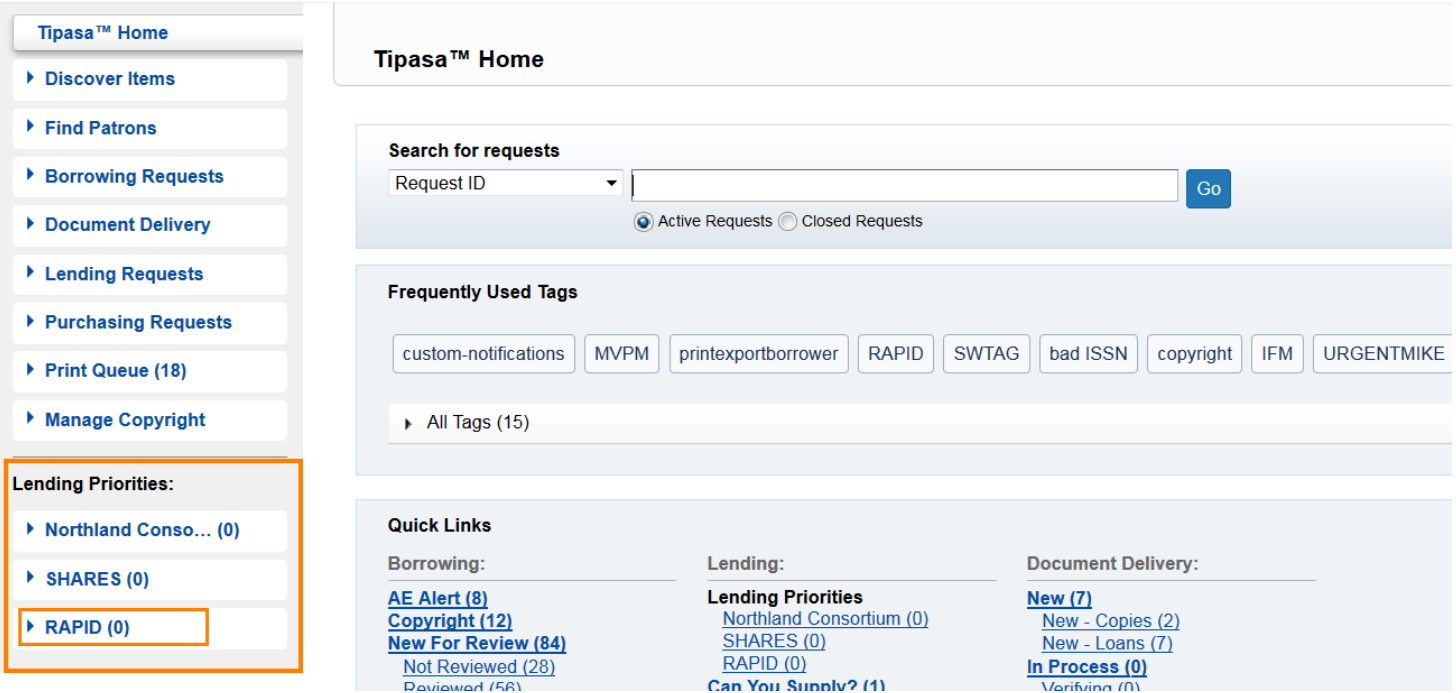
RapidILL integration for copies



Sharing Breakthroughs 2017 OCLC RESOURCE SHARING CONFERENCE

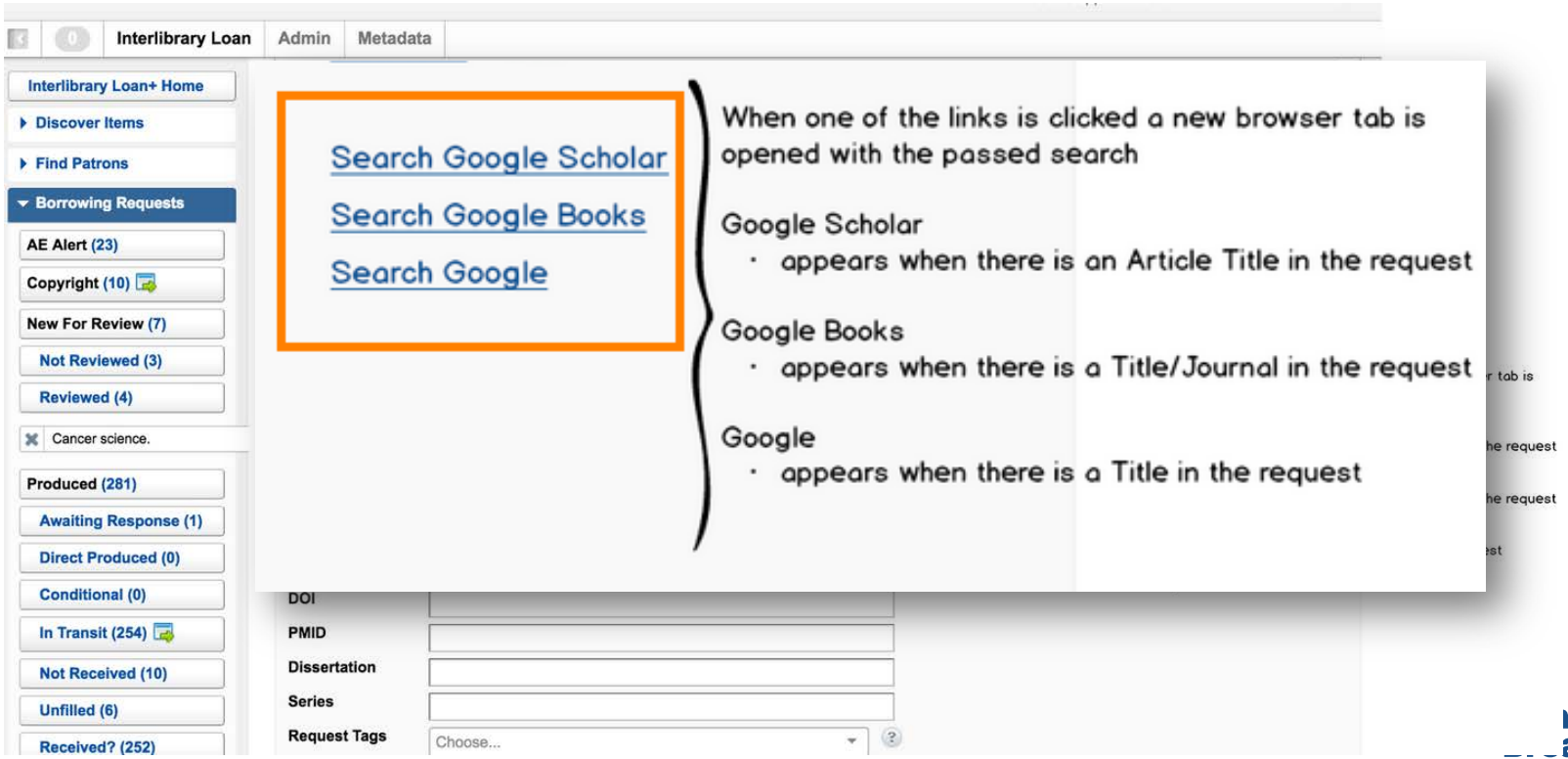
Current priorities:

RapidILL integration for copies



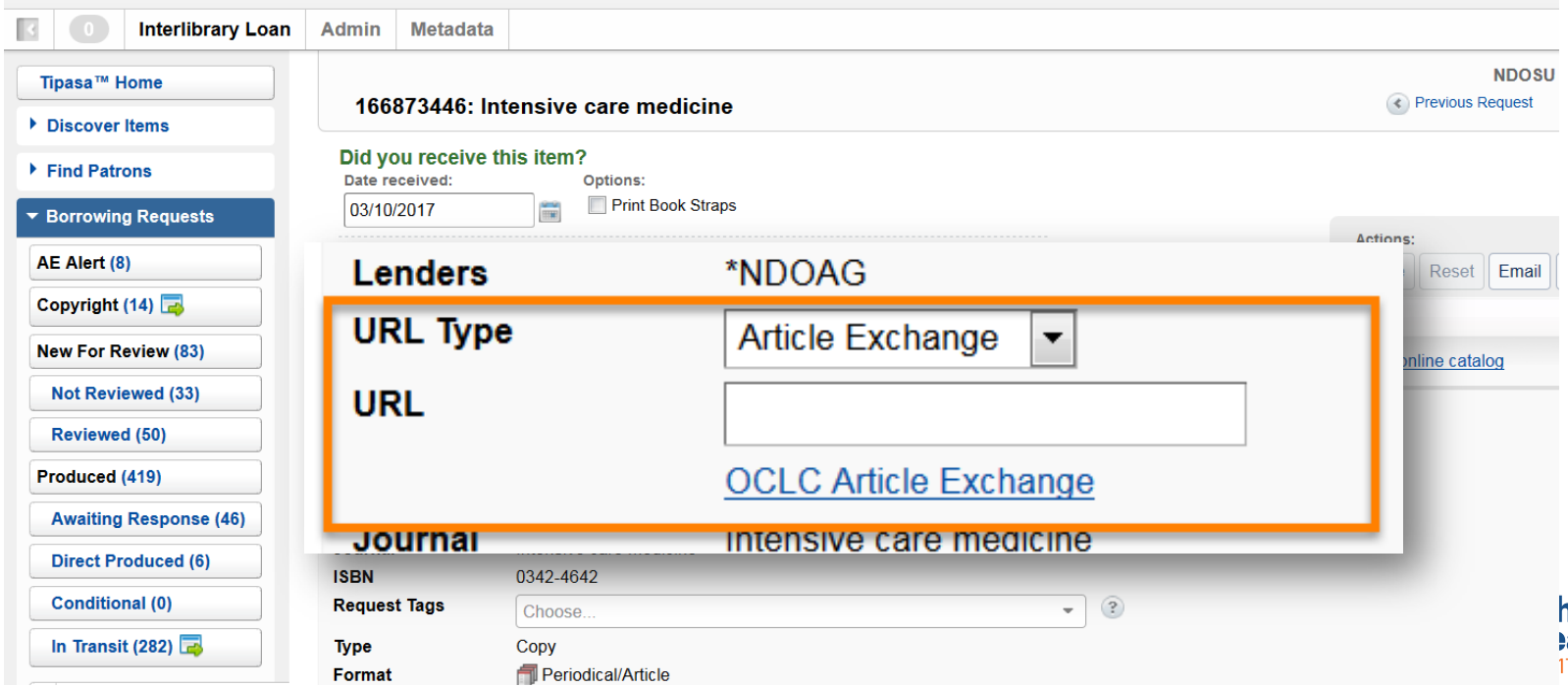
Sharing Breakthroughs
2017 OCLC RESOURCE SHARING CONFERENCE

Current priorities: Google search



Current priorities:

Attach document received via e-mail

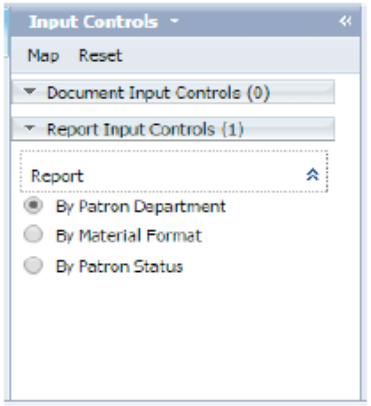


Current priorities:

Document Delivery reports

WorldShare

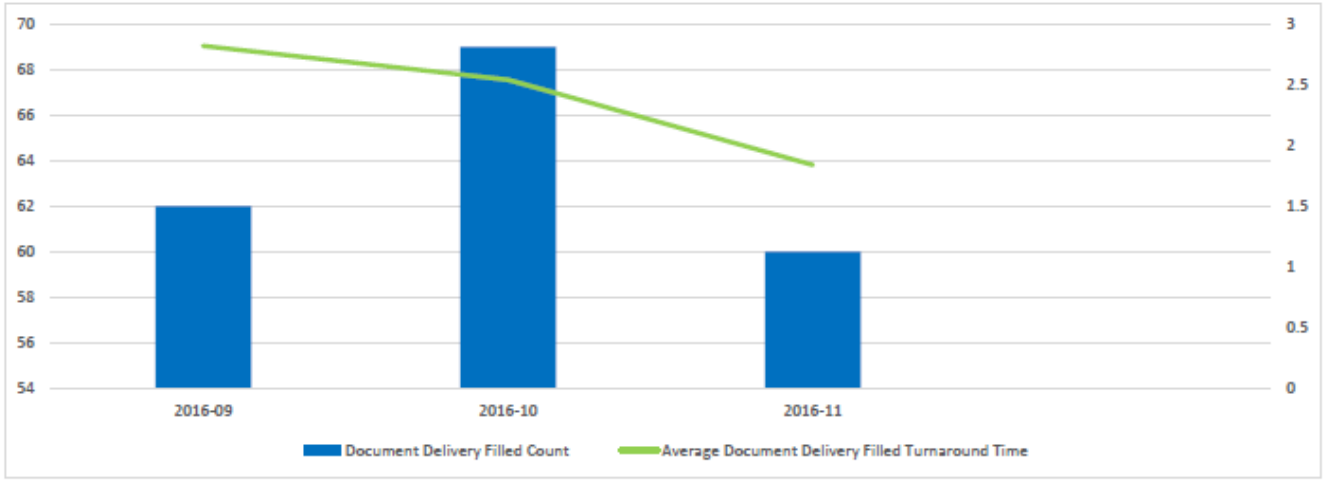
Document Delivery Request Statistics (By Patron Department)



Request Patron Department	Request Count	Document Delivery Filled Count	Average Document Delivery Filled Turnaround Time	Cancelled Request Count
ADP	3	2	1.5	1
ARS	1	1	1.25	0
Biological Sciences	1	1	2.54	0
biology	1	1	2.54	0
College for Women	13	7	2.54	4
Communication	1	1	2.54	0

Sharing Breakthroughs 2017 OCLC RESOURCE SHARING CONFERENCE

Document Delivery Activity Summary



	2016-09	2016-10	2016-11
Request Count	62	81	60
Document Delivery Filled Count	62	69	60
Average Document Delivery Filled Turnaround Time	2.82	2.54	1.84
Cancelled Request Count	0	4	0

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

OCLC