

Tipasa implementation timeline

Authentication and patron data decisions

For libraries that do not have WorldShare Management Services (WMS).

Migration timeline	Team lead (Total time: 2-3 hours)	IT support (Total time: 2-3 hours)
2+ weeks prior to cohort start date	Complete the implementation questionnaire, including your chosen authentication method.	
1+ week prior to cohort start date	Attend an authentication session with OCLC implementation staff (if needed).	
	Provide OCLC with authentication information for third-party configuration (and patron data load, if applicable). OCLC implementation staff are available for consultation if needed.	
Before go-live	Test authentication (and patron data load, if applicable).	

Cohort and training sessions

Migration timeline	Team lead (Total time: 16-20 hours)	ILL staff (Total time: 10-12 hours)
Week 1	Kickoff	Kickoff
	Training: Intro	Training: Intro
Week 2	Cohort Session 1: Core Tipasa Functionality	Cohort Session 1: Core Tipasa Functionality
	Training: Lending	Training: Lending
	Training: Copyright Management	Training: Copyright Management
	Time as needed for configuration discussion, decisions, and setup	
Week 3	Cohort Session 2: Tipasa System Configurations	Cohort Session 2: Tipasa System Configurations
	Training: Document Delivery (optional)	Training: Document Delivery (optional)
	Training: Patron Management & Notifications	Training: Patron Management & Notifications
	Time as needed for configuration discussion, decisions, and setup	
Week 4	Cohort Session 3: Patron-Facing Configurations & Functionality	Cohort Session 3: Patron-Facing Configurations & Functionality
	Cohort Session 4: Going Live	Cohort Session 4: Going Live
	Time as needed for configuration discussion, decisions, and setup	
Weeks 5-10 (as needed)	Cohort Session: Circulation Integration (if applicable)	Cohort Session: Circulation Integration (if applicable)
	Cohort Session: RapidILL Integration (if applicable)	Cohort Session: RapidILL Integration (if applicable)
	Cohort sessions and training from Weeks 1-4 (repeat as needed)	Cohort sessions and training from Weeks 1-4 (repeat as needed)
	GO LIVE	GO LIVE

More information

During your Tipasa implementation, an OCLC Implementation Manager is assigned to your cohort from start to finish. This person guides you step by step through the process and serves as your single point of contact for all your OCLC-related needs.

The kickoff session is held at the beginning of the month, and each session lasts approximately 1 hour. All cohort sessions (shown in lighter green and blue above) are held live, with recordings available as well. All training sessions (shown in darker green above) are available as recordings; all training sessions are held live and re-recorded three times each year (typically February, June, and October).

Libraries are typically ready to go live in Week 5. If your team would prefer to spread out or repeat sessions, you have the option to extend your implementation timeline up to a total of 10 weeks.

We suggest that you identify one or more people for each of these roles:

- “Team lead” is the designated coordinator for your library’s team, e.g., head of ILL, systems librarian, project manager.
- “IT support” should be whoever oversees authentication and patron data at your organization, e.g., IT staff, systems librarian.
- “ILL staff” should include anyone who will be using Tipasa to process ILL requests.

Resources

- [Authentication methods and patron data load](#)
- [Tipasa training](#)