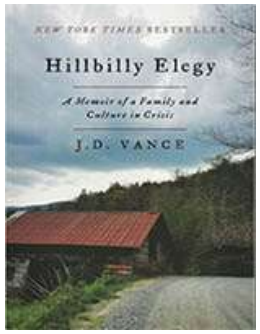
Colorado ILL Conference, April 19, 2018

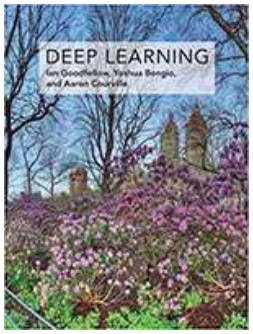
OCLC Update

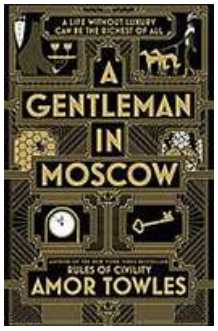
Christa Starck
Sr. Product Manager

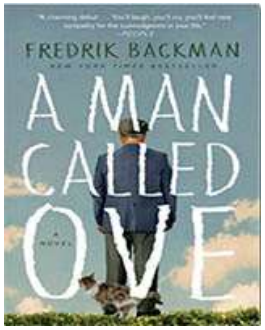
TOP REQUESTS

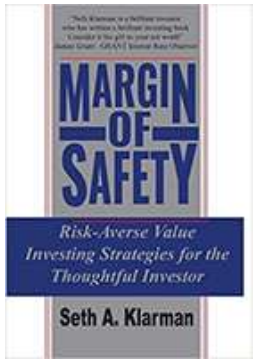
Top 10 Monographs – 2017

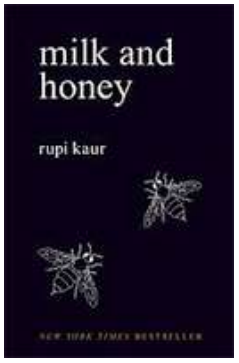


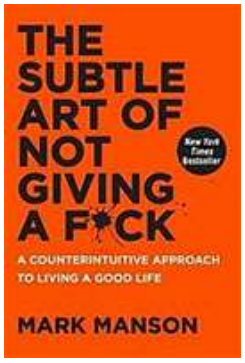


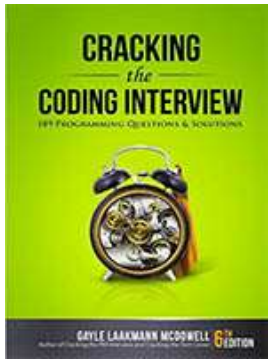


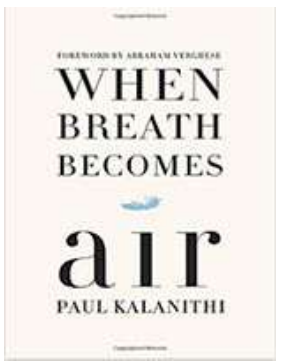




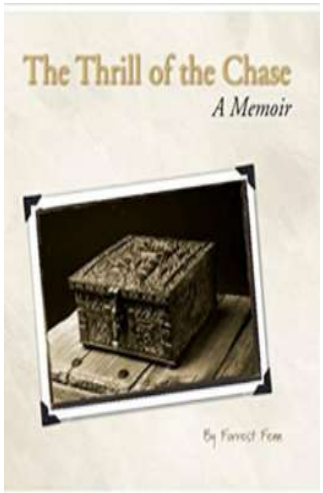


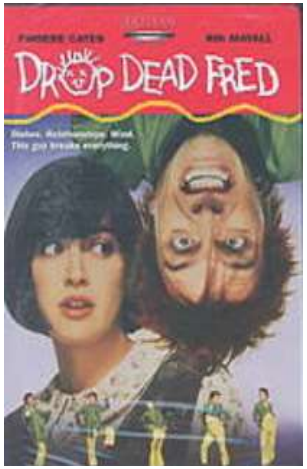


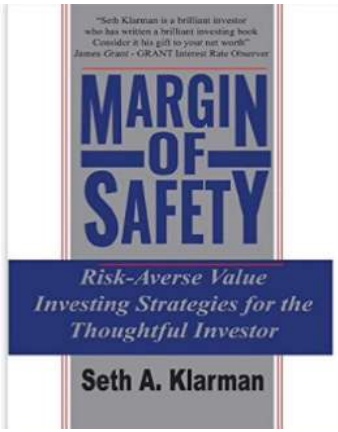


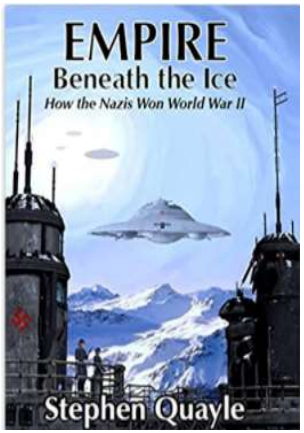


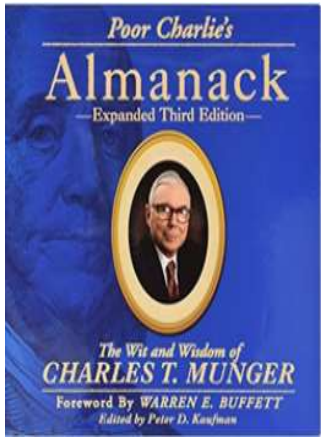
2017-Colorado



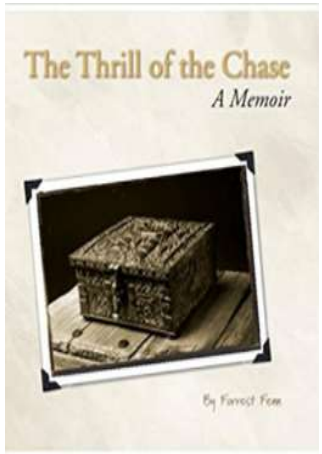


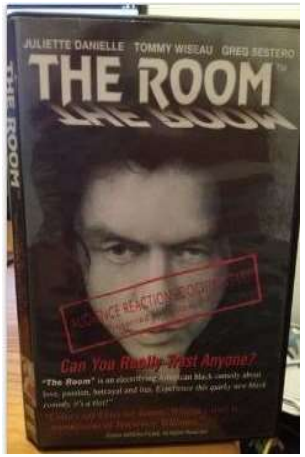


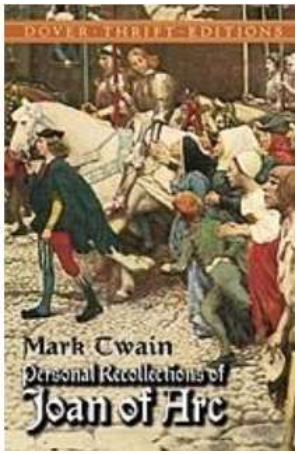




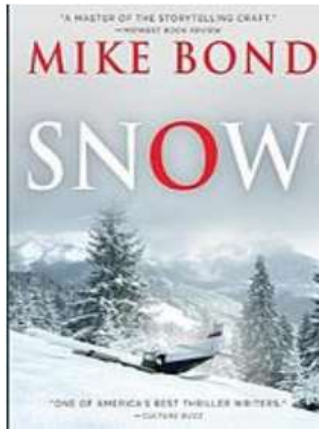
2018, so far…

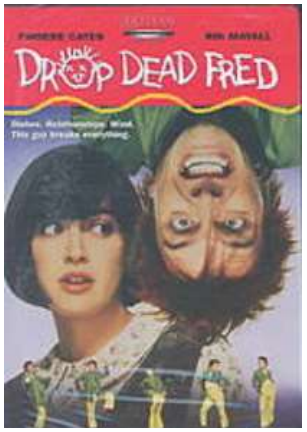


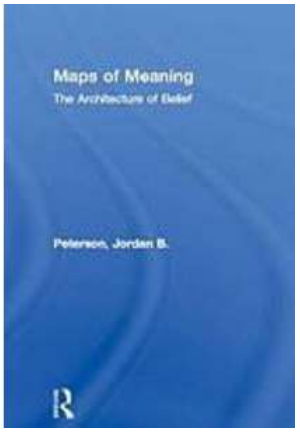




Coins and Coinage of al-Andalus: Studies Collected and Reprinted







FIRSTSEARCH

OCLC

FirstSearch®

Most powerful way to search WorldCat

WorldCat® Discovery

Enable cutting edge research

OCLC

FirstSearch is used in every area of a library…

Reference • ILL • Cataloging

Collection Development • Library users

Systems librarian/web developer

…to enable breakthroughs by library users

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FirstSearch: Satisfaction Survey

Engaging the FirstSearch Community

- Distributed Satisfaction Survey (243 respondents)
- Conducted Library Visits
- Solicited input from FirstSearch Advisory Board*

FirstSearch: What did we learn and how are we reacting?

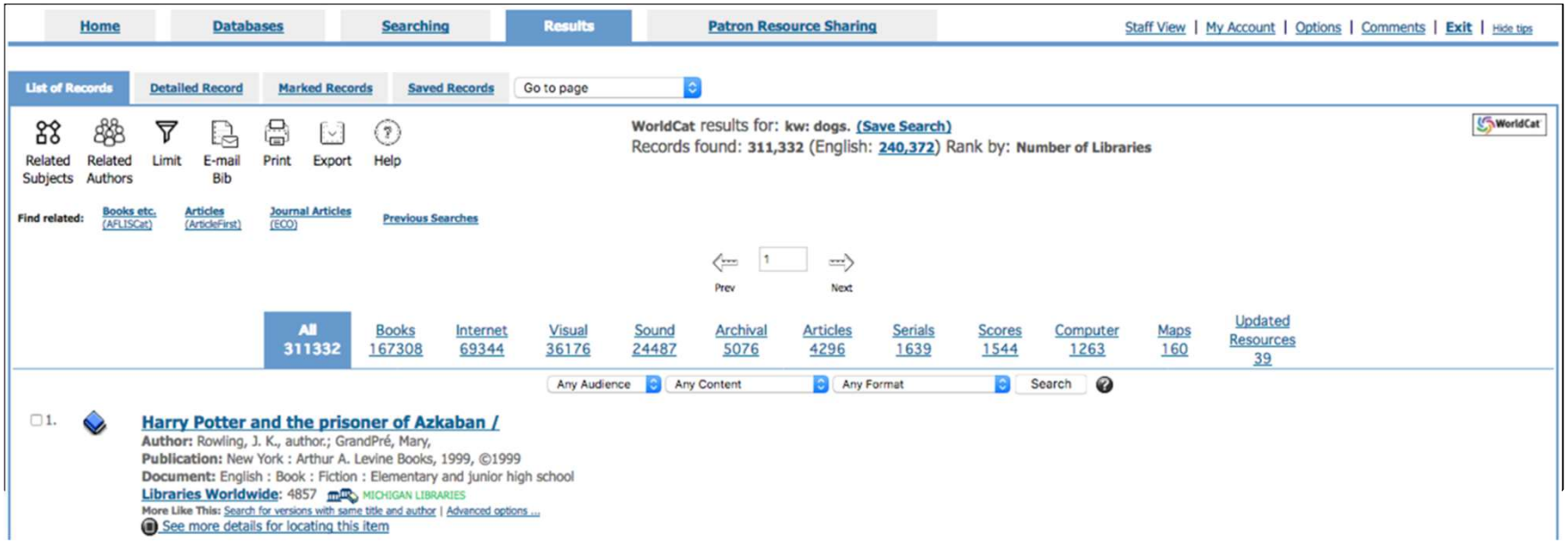
“If you were to change one thing about FirstSearch, what would you change?”

24% **Search interface needs to be improved/modernized**

Nothing/like as it is **20%**

OCLC

A new look for FirstSearch

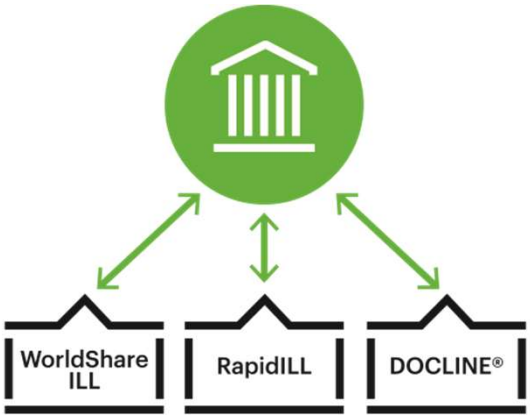


OCLC RESOURCE SHARING

OCLC

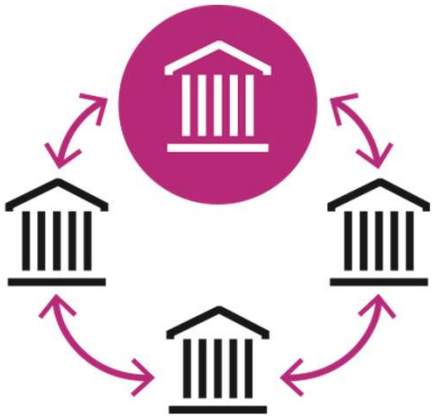
WorldShare Interlibrary Loan

Today, WorldShare Interlibrary Loan provides a critical role in providing thousands of individual libraries with core ILL capabilities.



Tipasa

Tipasa is a new ILL management system for individual libraries to share and obtain materials through different resources and systems as well as to provide an exceptional experience for the patron.



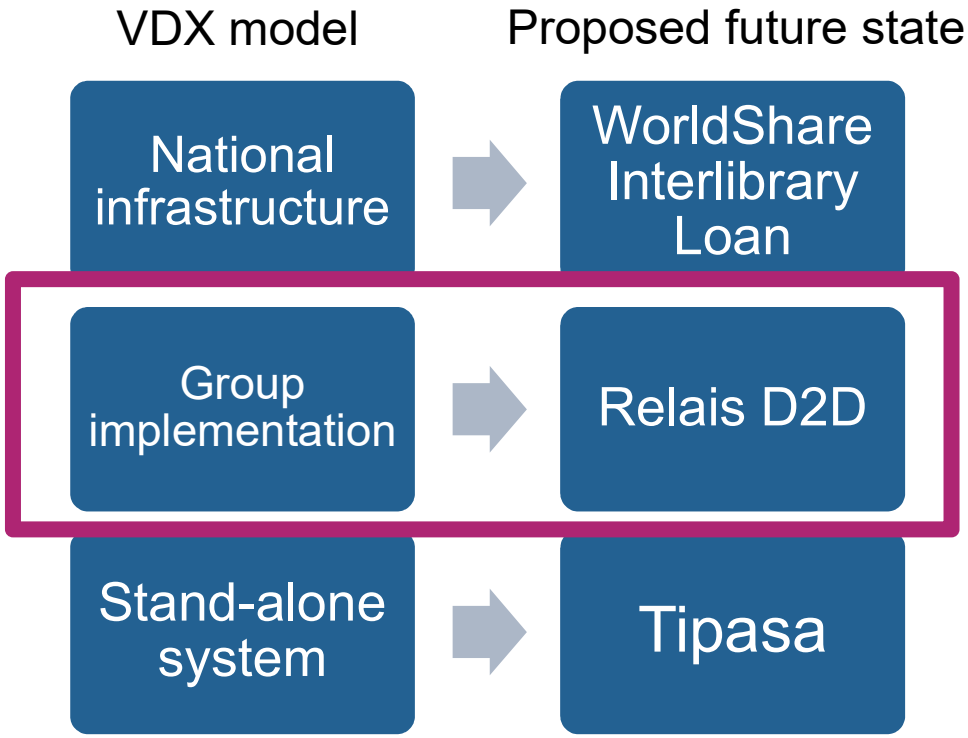
Relais D2D

Relais D2D is a best-in-class consortial borrowing and ILL management solution that integrates with library systems and includes requestability logic that dramatically improves fill rates.

OCLC

D2D in the USA

What about VDX?

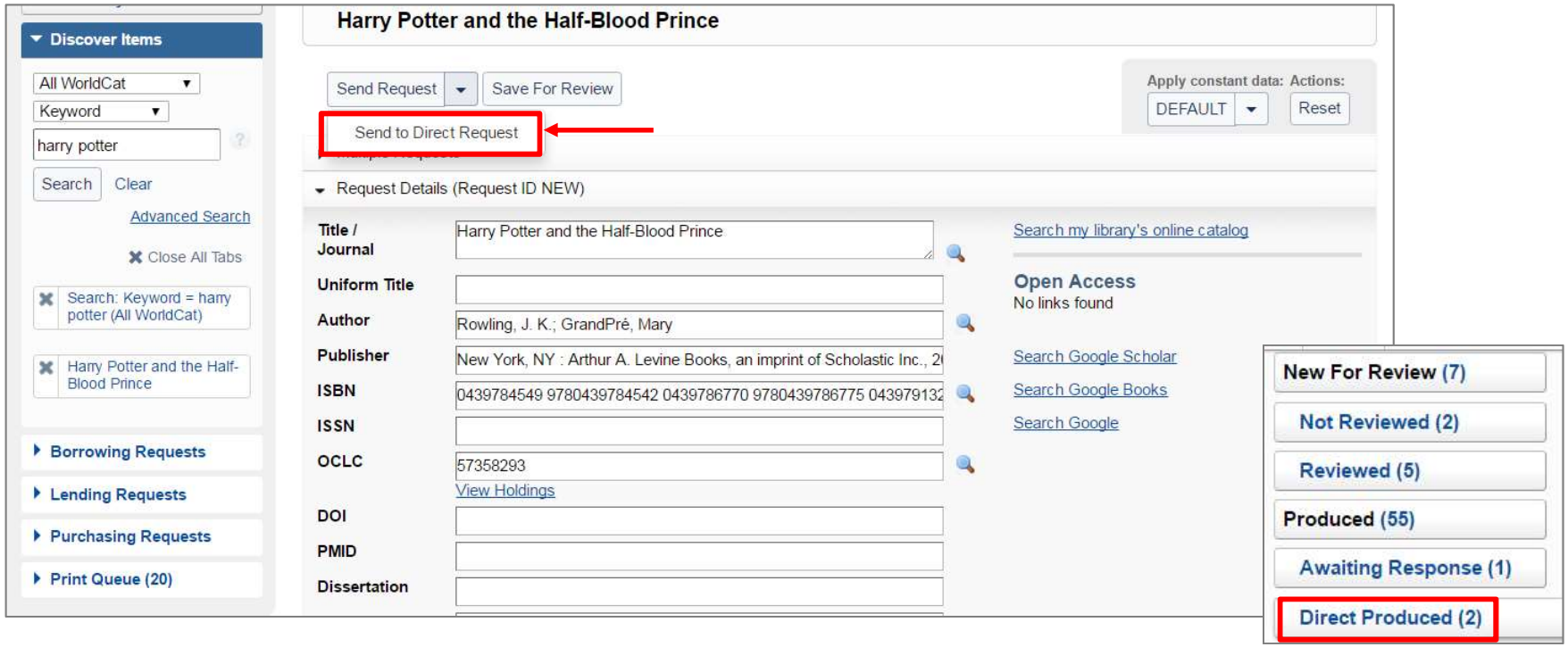


End of life date will be announced later this calendar year.

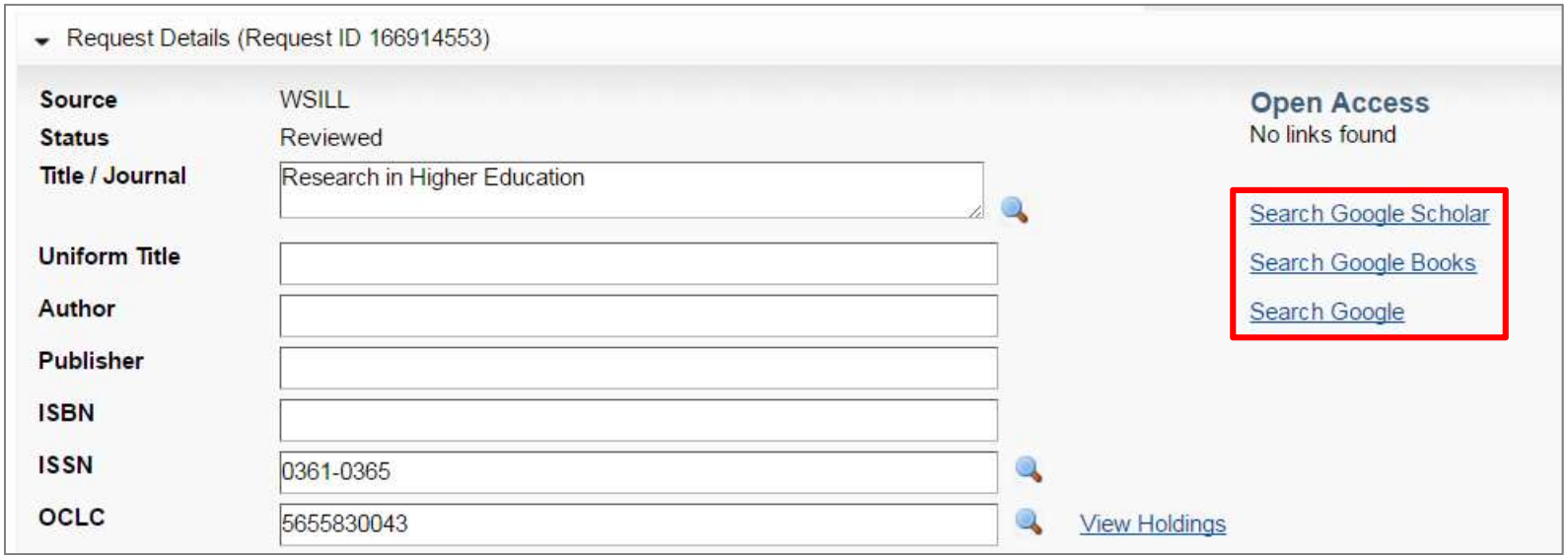
We want to ensure libraries have time to plan.

WORLDSHARE ILL ENHANCEMENTS

Send new requests manually through Direct Request



Look up requested items in Google



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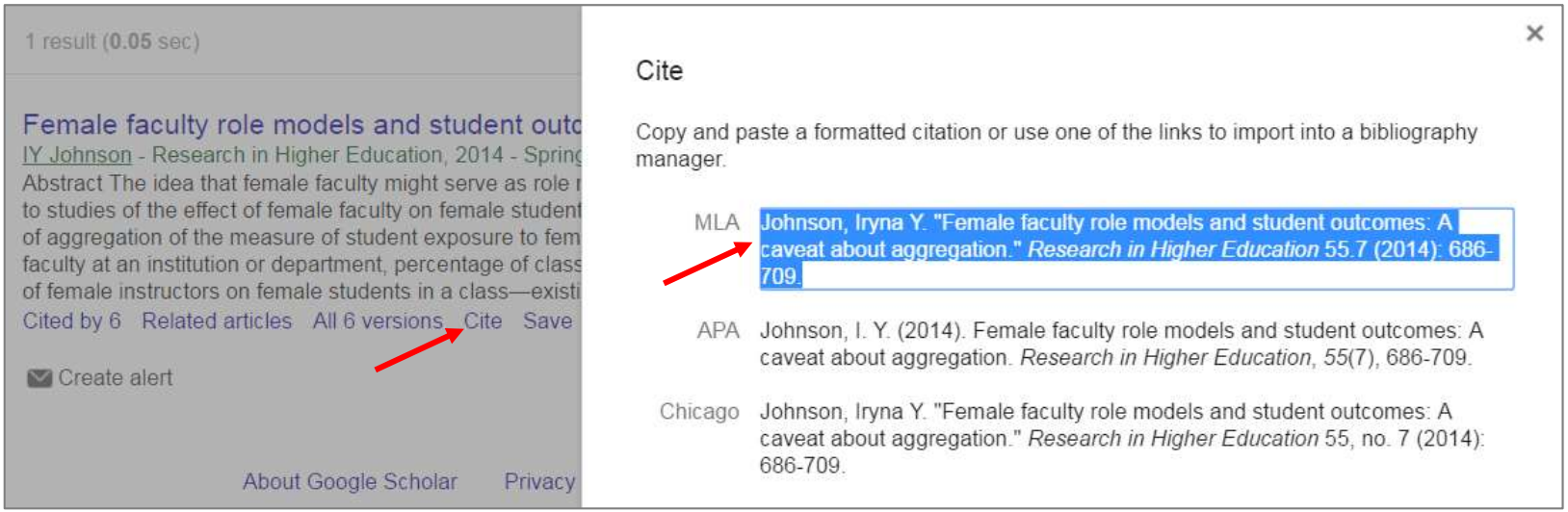
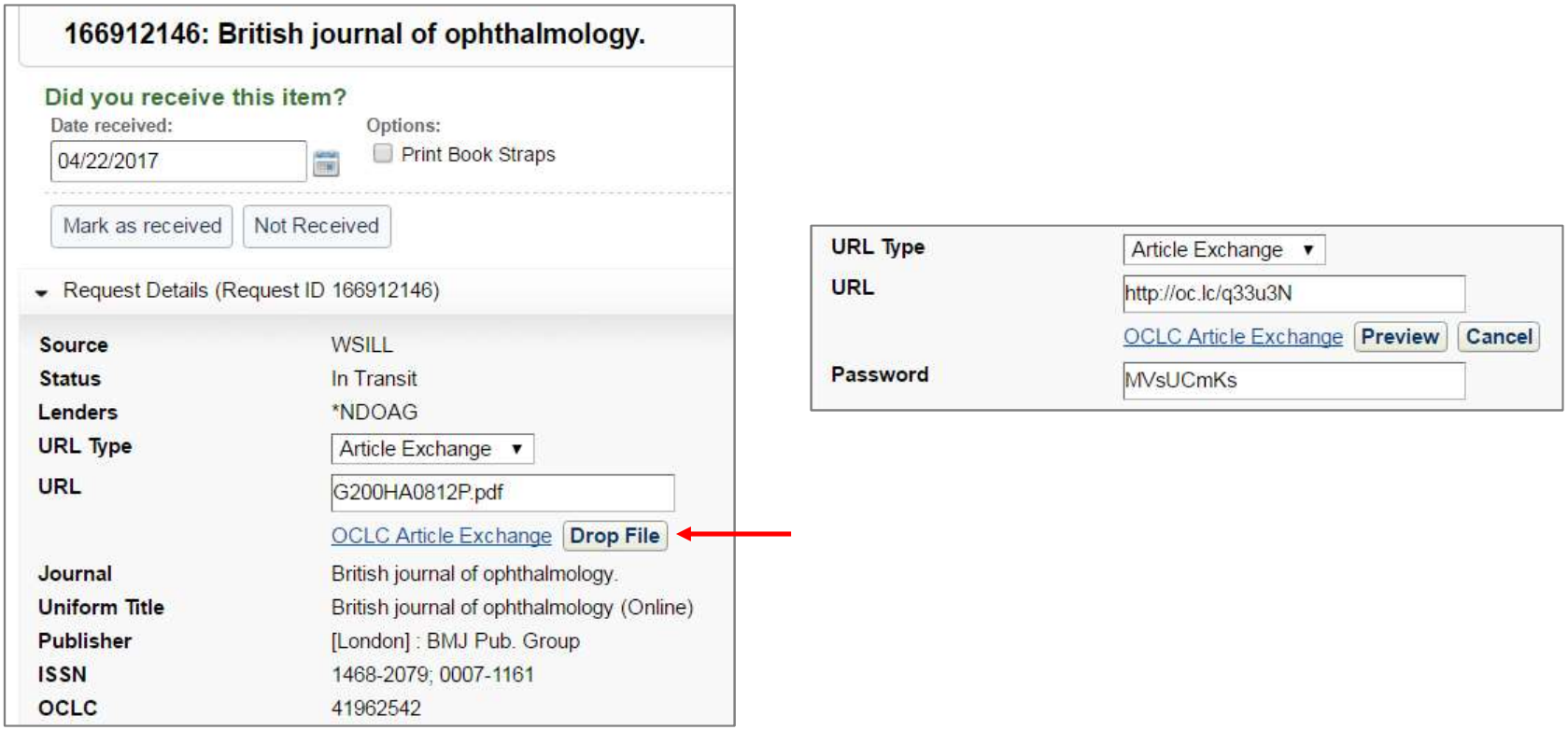
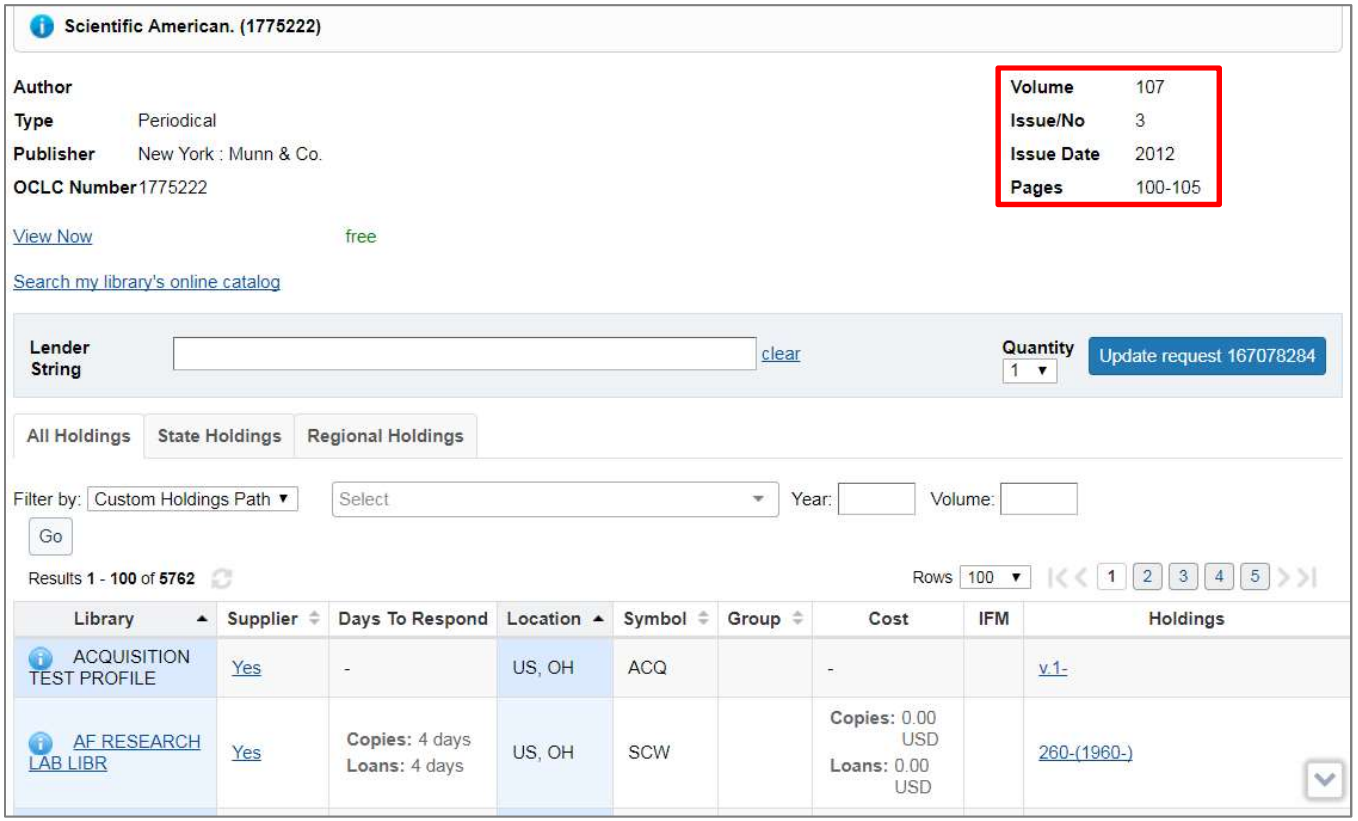


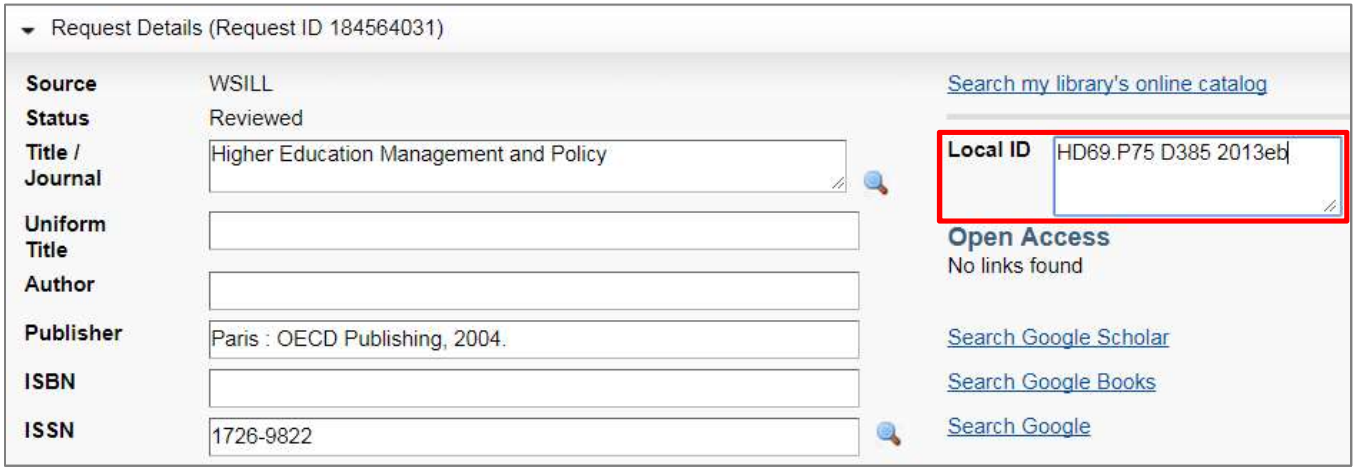
Deliver document received by email via Article Exchange



See complete citation information (borrowing)



Save local holdings information (borrowing)



Print due date on borrowing book strap

Additional document suppliers

- British Library On Demand (BRI)
- CCC Get It Now (GETIT)
- CISTI (CAI)
- Document Suppliers using MyBib eL application
  - Bayerische Staatsbibliothek (GEBAY)
  - Technische Informationsbibliothek or TIB (UB#)
  - Staatsbibliothek zu Berlin – ***NEW! (S5B)***
  - Zentralbibliothek Zürich or ZB Zurich – ***NEW! (ZD0)***

View the activation and use documentation at: **oc.lc/mybibel**

Scanner integration

Pilot testing in progress

- BSCAN
  - Atlanta University Center
  - Southern Oregon University
  - Trinity International University
  - University of Central Missouri
  - University of Missouri - St. Louis
- Scannx
  - Eastern Washington University
- Libraries that use Scannx software are still needed to pilot test this integration

Please contact OCLC Support (support@oclc.org)

Coming soon

- Receive an email alert when a new request arrives in the lending queue – for infrequent lenders
- Enhanced purchase workflows
  - Specify criteria (e.g., format, year, patron status) for potential purchases
  - Automatically route requests meeting those criteria to purchase workflow
  - Return unpurchased items to borrowing workflow

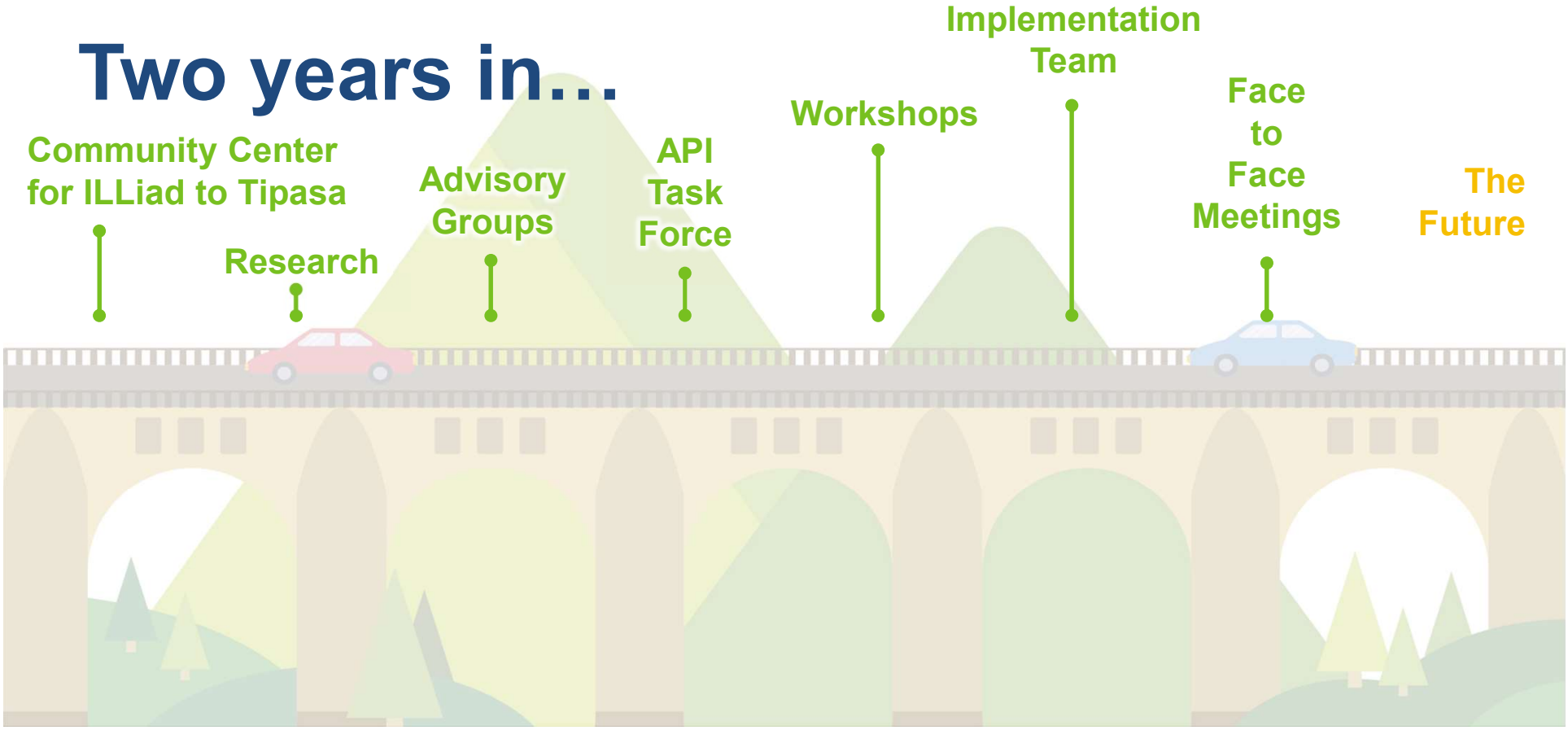
TIPASA

OCLC

Tipasa demo video

https://www.youtube.com/watch?v=nUK8pRm-GkM&t=2s

Two years in…


Community Center for ILLiad to Tipasa
Research
Advisory Groups
API Task Force
Workshops
Implementation Team
Face to Face Meetings
The Future

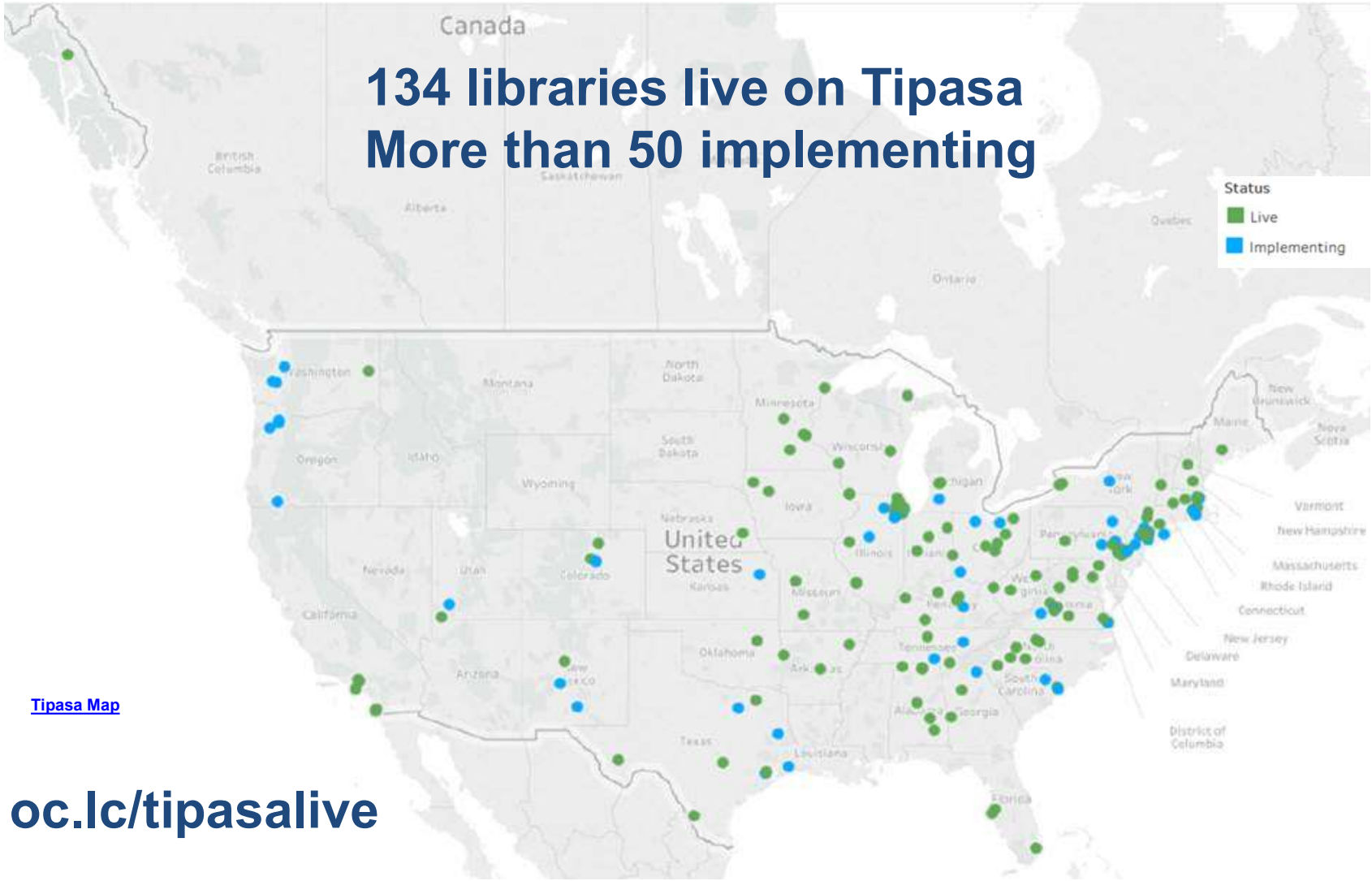
Phase 2 advisory group members

- **Mikki Butcher**, James Madison University
- **Nicole Colello**, University at Buffalo, The State University of New York
- **Amber Cook**, University of South Carolina
- **Kaylin Creason**, Bethel University
- **Maureen O'Brien Dermott**, Dickinson College
- **Kate Enge**, Juneau Public Libraries
- **Caitlin Finlay**, Cornell University
- **Robyn Fleming**, The Metropolitan Museum of Art
- **C. William Gee**, East Carolina University
- **James B. Harper**, Wake Forest University
- **Krista Higham**, Millersville University
- **Sarah Kasten**, University of Notre Dame
- **David H. Ketchum**, University of Oregon
- **Carol Kochan**, Utah State University
- **Micquel Little**, Claremont Colleges
- **Megan Lounsberry**, Louisiana State University
- **Kurt Munson**, Northwestern University
- **Melissa Perez**, University of Texas at San Antonio
- **Renna Redd**, Clemson University
- **Liza Scherff-Neskarikar**, Princeton University
- **Zehra Zamin**, LOUIS: The Louisiana Library Network

OCLC Resource Sharing team out in the Community

PHASES & ROADMAPS

134 libraries live on Tipasa
More than 50 implementing



Tipasa Map

oc.lc/tipasalive

OCLC

Tipasa®

Overview Features **Resources** Ordering **Need support or training?**

using ILLiad. With this deeper understanding, we will continue to develop Tipasa to meet the needs of current ILLiad users.

Current Tipasa users can access the OCLC Community Center to connect online, share best practices, stay up to date on new product releases and contribute ideas to improve OCLC services. From the Community Center, users can also access Tipasa's Support and Training website, which includes a comprehensive collection of training and documentation resources.

Libraries using Tipasa

- Alabama A&M University (Symbol: MWT, State: AL)
- Albright College (Symbol: ABI, State: PA)
- Arkansas State University (Symbol: ASU, State: AR)
- Asbury Theological Seminary (Symbol: KAT, State: KY)
- Ashford University (Symbol: IO9, State: CA)
- Atlanta University Center (Symbol: AUU, State: GA)
- Auburn University (Symbol: AAM, State: AL)
- Augsburg College (Symbol: MNA, State: MN)
- Bellarmine University (Symbol: KBC, State: KY)
- Bennington College (Symbol: BNT, State: VT)

OCLC ILL phase 2 advisory group members

OCLC ILL phase 1 advisory group members

oc.lc/tipasalive

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Tipasa Phases

Phase 1	Phase 2	Phase 3
• Small and medium academics libraries • Small and medium public libraries • Generally using ILLiad out of the box (little to no customization)	• Medium academic libraries • Using RapidILL • WorldShare Circulation integration • Reprints Desk	• Large academics and ARLs • Significant customization and need for APIs • DOCINE • NCIP integration

oclcresourcesharing@oclc.org

Target date for completing migrations for Phase 1 & 2 libraries

September 30, 2019

Incentive for libraries that sign up for cohort and return paperwork by September 30, 2018

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Ph 1 and Ph 2 Migration: Next steps

Step 1

Directors received email mid-March

Review roadmap and discuss target migration date with your team

Step 2

Sign up for a cohort at oc.lc/tipasacohort

OCLC Tipasa recruit team will follow-up

Step 3

Return signed MSA and Tipasa quote by Sept 30, 2018 for incentive

oc.lc/tipasacohort **oclcresourcesharing@oclc.org**

Tipasa® phase 2 roadmap

Targeted for delivery by June 2018	Targeted for delivery by October 2018	Targeted for delivery by February 2019	Targeted for delivery by June 2019
Purchase Workflow • Specify criteria (e.g., format, year, patron status) for potential purchases • Automatically route requests meeting those criteria to purchase workflow • Submit purchase requests to WMS Acquisitions • Return unpurchased items to borrowing workflow **Circulation Integration** • Automatically update lending requests in WMS Circulation at Shipped, Received, Returned, and Checked-in	**Patron Data** • Optionally retain patron data on closed requests for up to 5 years **Article Exchange** • Deliver files up to 120 MB **Local Catalog Integration** • View local holdings and availability information for lending requests	**Printing** • Print book stickers for borrowing and document delivery requests **Reprints Desk Integration** • View Reprints Desk price, purchase via IFM, and deliver via Article Exchange **Branch Workflow** • Improve workflows for multiple locations, including storage facilities • Provide notifications that are specific for a location	**Internal Notes** • Add one or more local notes to a request **Additional purchase options** • View Amazon price *Additional functionality and workflow improvements recommended by the community*

oc.lc/tipasaphase2roadmap

Tipasa® phase 3 roadmap

Research topics	Targeted for delivery in 2019	Targeted for delivery in 2020
2018 • Additional automation with Direct Request • Additional search and purchase options • API advisory group (development and testing) • Circulation integration • Health science workflows (e.g., DOCLINE) • Lending request forms • New ISO standard • Ongoing research on library workflows **2019** • Analytics • Manual borrowing workflow • Relais D2D integration • Ongoing research on library workflows **2020** • Billing for lending charges • RapidR • Detailed request history	**Additional automation with Direct Request** • Auto-tagging of requests that meet specified criteria (e.g., year, patron status) **Additional search and purchase options** • Look up items in third-party providers **APIs** For example: • Input patron request data from your custom forms directly to Tipasa • Pull patron-specific data from Tipasa and incorporate into your library's patron display **Circulation integration (NCIP) with Alma** (borrowing and lending) **Lending request forms** (for non-OCLC libraries) **New ISO standard**	**Additional API functionality** **Advanced branch workflow options** **Analytics** **Circulation integration (NCIP) with other ILS systems** (borrowing and lending) **DOCLINE integration** **Manual borrowing workflow** (for non-OCLC libraries) **Relais D2D integration** *Additional functionality and workflow improvements recommended by the community*

oc.lc/tipasaphase3roadmap

Rapid pilot – Tipasa

- Kutztown University

Image courtesy Kutztown University

Roadmap detail: In development

- Circulation integration – NCIP
- Purchase workflow improvements
- Integration with WMS Acquisitions

Roadmap detail: New or moved up

- Patron data retention option
- Increase size of Article Exchange file size limits
- Reprints Desk integration
- Book stickers for borrowers
- Internal notes

Patron Data

- We hear you!
- Lots of use cases and applications where you need this data to serve your patrons
- Option to retain patron data on closed requests for months/years up to 5 years
- Infrastructure as well as feature development changes – targeted for availability in August 2018

Tipasa API Task Force Members

- **Eric Bivona**, Dartmouth College
- **Tyler Ashcroft**, Brigham Young University
- **Ralph Johnson**, University of Michigan
- **Lauren Ajamie**, University of Notre Dame
- **Mark Sullivan**, IDS Project
- **Tim Jackson**, University of Albany
- **Shannon Pritting**, SUNY Poly

API Task force conclusions

- Defined list of use cases
- Technical preferences
- Ideas for sharing knowledge and what you create

API Task force next steps

- Advisory group
- Schedule work on Tipasa roadmap - iterative
- Testing and feedback from API Advisory group members

What about Phase 3 libraries?

- Sit tight on ILLiad
- ILLiad maintenance release planning
- Research topics
  - DOCLINE libraries - in depth research to begin this summer
  - Manual workflows for borrowing and lending
- API advisory group
  - Technical developers to help us test APIs over the next 12 months

Contact: Jennifer Corsi corsij@oclc.org

MORE INFORMATION

ILLiad to Tipasa

oc.lc/illiadtotipasa

Home | Discussions | News | Events | FAQ | Recordings | Preparing | Resources

Popular Links

- Welcome
- Quarterly Newsletter **(December 2017)**
- Phase 2 and Phase 3 Roadmaps **New!**
- What's Included in Tipasa?
- Tipasa Brochure
- OCLC Resource Sharing Conference 2017 **(Session Recordings)**
- Resource Sharing Revolutionized
- Request more information

Thanks to all the presenters and attendees who joined us in Jacksonville and made the 2018 OCLC Resource Sharing Conference a success!

For those who weren't able to attend or would like to take a look at any presentations they missed, we will be posting slides and audio recordings of all presentations on the Agenda page of the 2018 RSC website shortly. Notifications will be sent through the Community Center and regular communication channels once they are posted.

New Recordings Page

If you have questions or would like to learn more about how specific features and functionality in Tipasa work, check out the Recordings page for short demos of a range of functionality. We will be adding new recordings to the page periodically.

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ILLiad to Tipasa

Home | Discussions | News | Events | FAQ | **Recordings** | Preparing | Resources

Recordings

The recordings on this page provide in depth overviews of Tipasa as well as detailed looks at specific functionality essential to library workflows. If you have comments or questions about any of these videos, please add them to the Discussion board.

All videos will play in the WebEx Network Recording Player. You will be prompted to download this player if it is not already installed on your computer.

Tipasa Demo
Brief, high-level overview of Tipasa functionality. (17 min)

Borrowing
Review the borrowing process from request, through fulfillment and return. (22 min)

Copyright
Learn how Tipasa can help you track copyright. (12 min)

Document Delivery
Find out about document delivery workflows in Tipasa. (6 min)

Lending
Review the lending process from request through shipping and return. (18 min)

Patron Interface
See what your patrons will see when they use Tipasa. (25 min)

RapidILL Integration
Watch how Tipasa integrates with RapidILL to streamline fulfillment of article and book chapter requests. (8 min)

Service Config
Learn about the configurable settings available in Tipasa. (24 min)

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ILLiad to Tipasa

Home | Discussions | News | Events | FAQ | Recordings | **Preparing** | Resources

Preparing for Tipasa

More than 120 libraries have already taken the plunge, and 50 more are on their way. Come on in, the water's fine.

- What features does Tipasa include?
- Want to see Tipasa in action?
- Want to learn about the migration process?
- Ready for a price quote?
- Want to talk with a Tipasa expert?

Sign up for a Tipasa cohort

Migration cohorts start at the beginning of each month. If you are a Phase 1 or Phase 2 library, choose your cohort today.

Your institution needs to sign two items:

- Price quote (request here)
- Master Services Agreement:
  - Sign online **OR**
  - Download PDF

Please return signed documents to oclcresourcesharing@oclc.org.

Hear from your peers

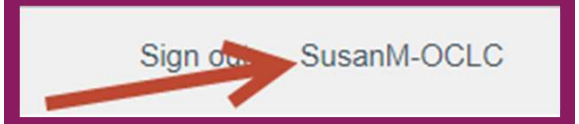
Come on in, the water's fine

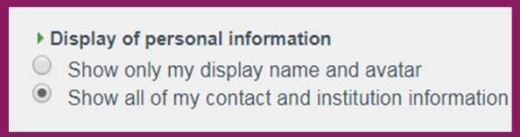
Making the move to Tipasa: A second panel discussion

OCLC

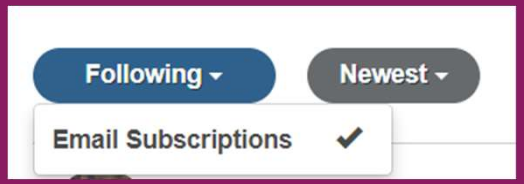
Making the most of the Community Center

Update your profile & make it public

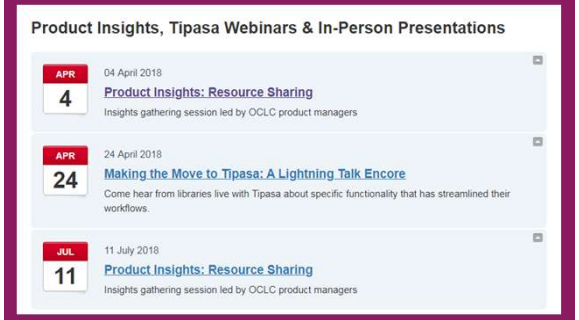




Subscribe to both News & Discussions



Register for upcoming events



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