

Colorado ILL Conference, April 19, 2018

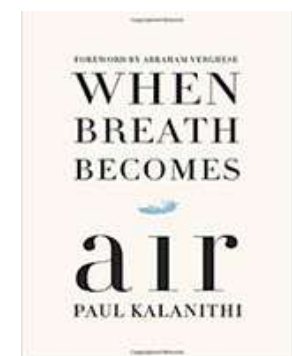
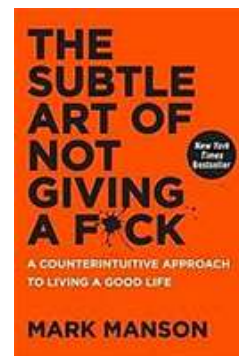
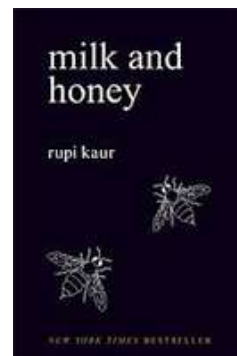
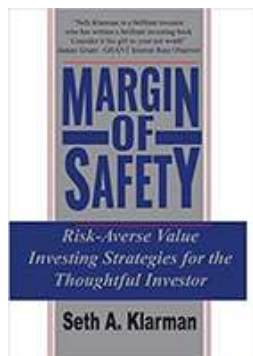
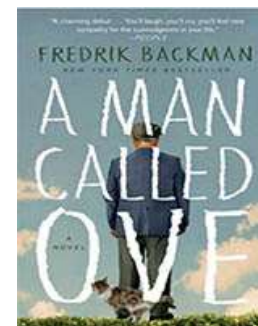
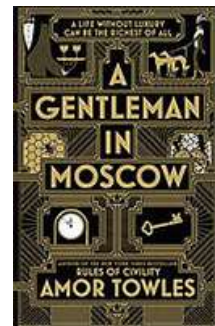
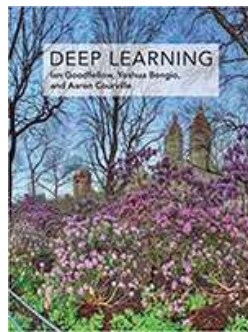
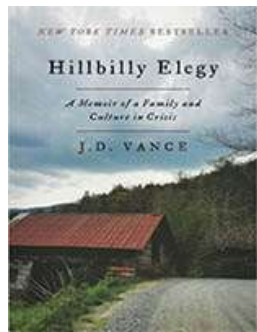
OCLC Update

Christa Starck

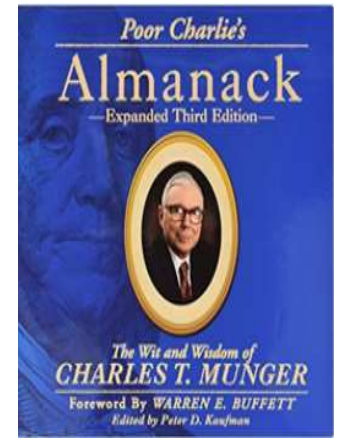
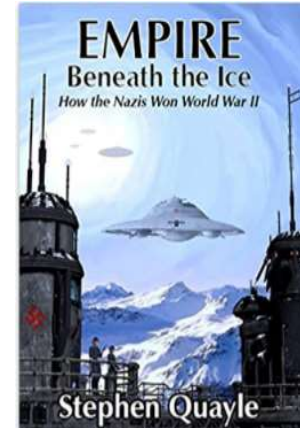
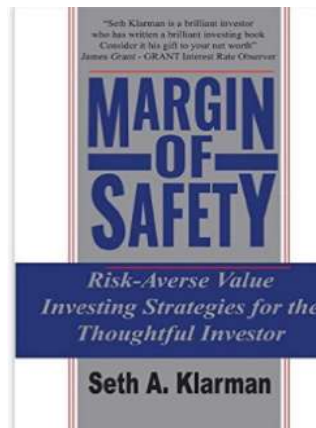
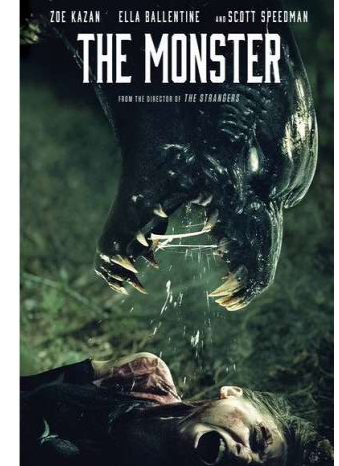
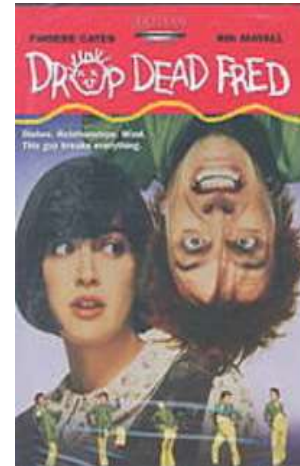
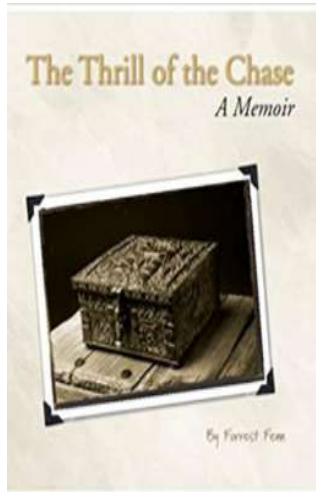
Sr. Product Manager

TOP REQUESTS

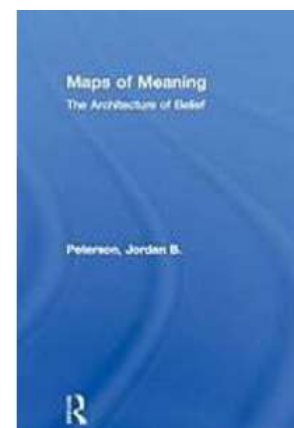
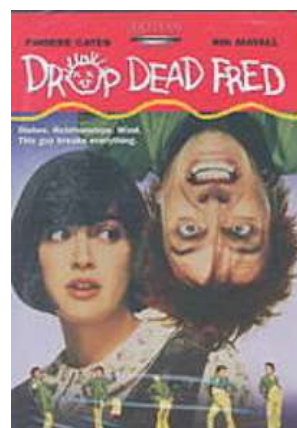
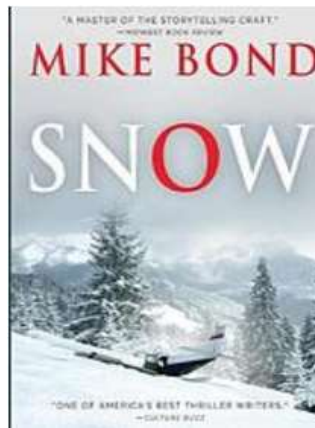
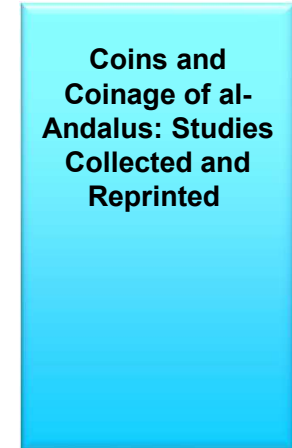
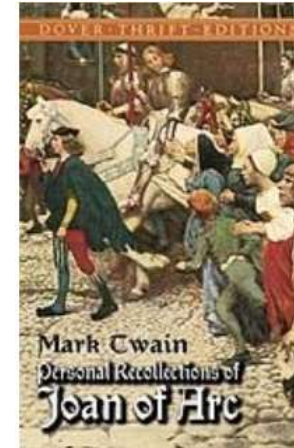
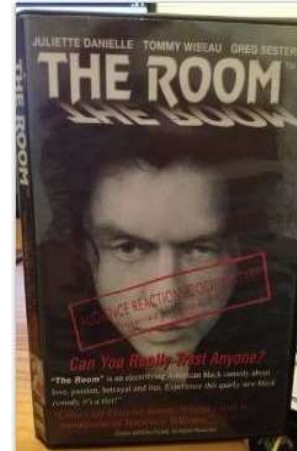
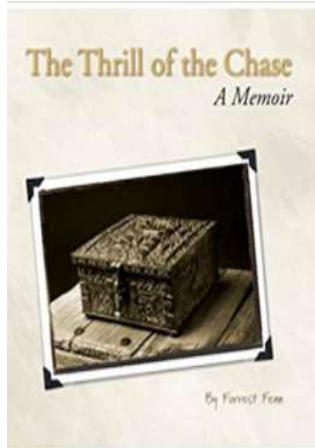
Top 10 Monographs – 2017



2017-Colorado



2018, so far...



FIRSTSEARCH

FirstSearch[®]

Most powerful way to
search WorldCat



WorldCat[®]
Discovery

Enable cutting
edge research

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 

FirstSearch: Satisfaction Survey

Engaging the FirstSearch Community

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



FirstSearch
Satisfaction

85%

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%

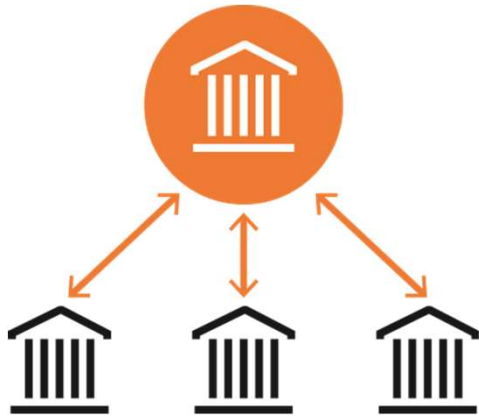
A new look for FirstSearch

The screenshot displays the FirstSearch interface with the following elements:

- Navigation Bar:** Home, Databases, Searching, Results (active), Patron Resource Sharing. Utility links: Staff View, My Account, Options, Comments, Exit, Hide tips.
- Record Management:** List of Records, Detailed Record, Marked Records, Saved Records. Includes a "Go to page" dropdown.
- Tools:** Related Subjects, Related Authors, Limit, E-mail Bib, Print, Export, Help.
- Search Summary:** WorldCat results for: kw: dogs. (Save Search). Records found: 311,332 (English: 240,372) Rank by: Number of Libraries.
- Find related:** Books etc. (AFLISCat), Articles (ArticleFirst), Journal Articles (ECO), Previous Searches.
- Page Navigation:** <--- 1 ---> with "Prev" and "Next" buttons.
- Filter Summary:**

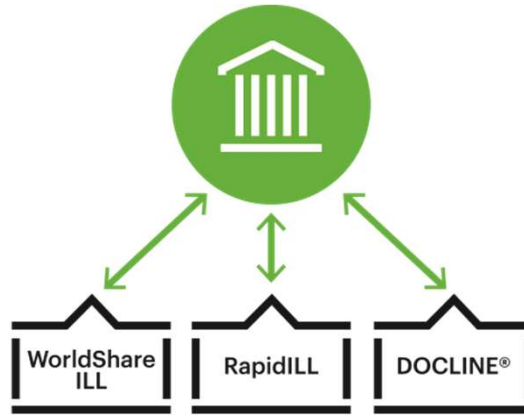
All	Books	Internet	Visual	Sound	Archival	Articles	Serials	Scores	Computer	Maps	Updated Resources
311332	167308	69344	36176	24487	5076	4296	1639	1544	1263	160	39
- Search Filters:** Any Audience, Any Content, Any Format, Search.
- Record 1:**
 - Title:** [Harry Potter and the prisoner of Azkaban /](#)
 - Author:** Rowling, J. K., author.; GrandPré, Mary,
 - Publication:** New York : Arthur A. Levine Books, 1999, ©1999
 - Document:** English : Book : Fiction : Elementary and junior high school
 - Libraries Worldwide:** 4857 MICHIGAN LIBRARIES
 - More Like This:** [Search for versions with same title and author](#) | [Advanced options ...](#)
 - See more details for locating this item**

OCLC RESOURCE SHARING



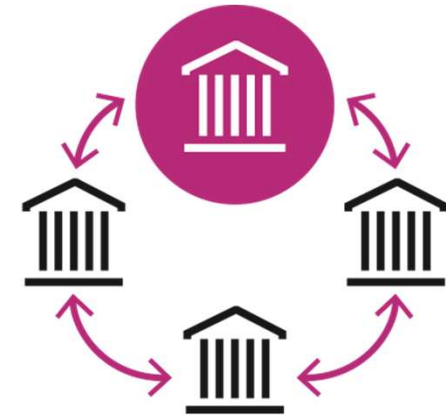
WorldShare Interlibrary Loan

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.



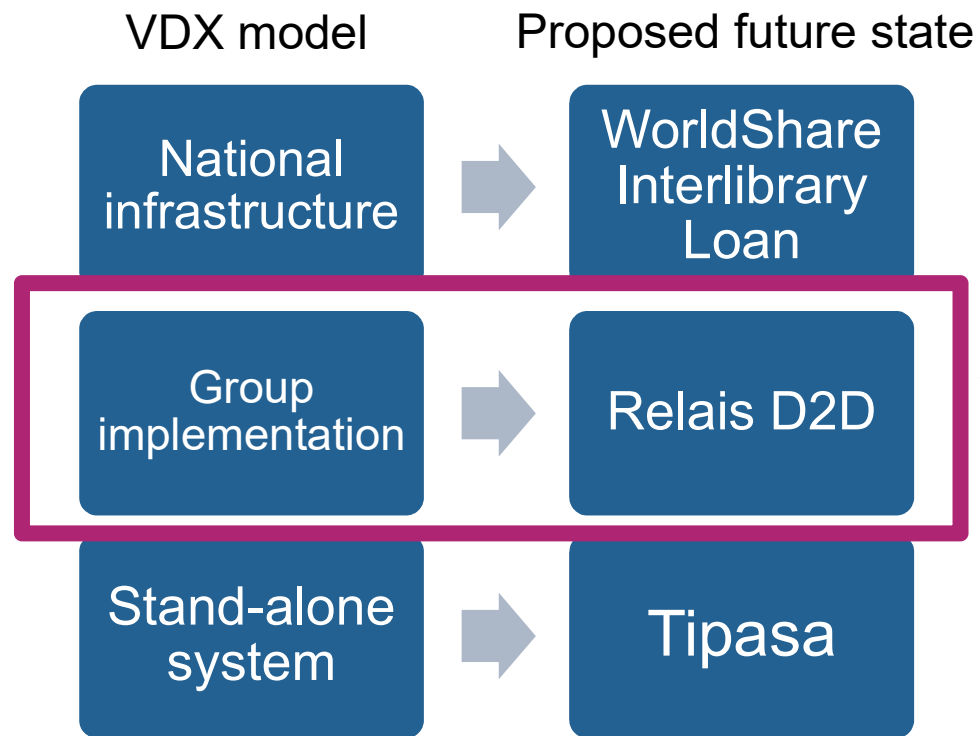
Relais D2D

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.

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

The screenshot shows the OCLC Direct Request interface for the book "Harry Potter and the Half-Blood Prince". The interface is divided into several sections:

- Discover Items:** A sidebar on the left with search options. It includes a dropdown for "All WorldCat", a "Keyword" dropdown, and a search input field containing "harry potter". There are "Search" and "Clear" buttons, and a link to "Advanced Search". Below this, there are tabs for "Search: Keyword = harry potter (All WorldCat)" and "Harry Potter and the Half-Blood Prince".
- Request Actions:** At the top right, there are buttons for "Send Request" (with a dropdown arrow), "Save For Review", and "Apply constant data: Actions: DEFAULT" (with a dropdown arrow) and "Reset".
- Request Details:** A section titled "Request Details (Request ID NEW)" containing a table of metadata:

Title / Journal	Harry Potter and the Half-Blood Prince
Uniform Title	
Author	Rowling, J. K.; GrandPré, Mary
Publisher	New York, NY : Arthur A. Levine Books, an imprint of Scholastic Inc., 21
ISBN	0439784549 9780439784542 0439786770 9780439786775 043979132
ISSN	
OCLC	57358293 View Holdings
DOI	
PMID	
Dissertation	
- Open Access:** A section on the right with the heading "Open Access" and the text "No links found". It includes links for "Search my library's online catalog", "Search Google Scholar", "Search Google Books", and "Search Google".
- Request Status Summary:** A vertical stack of buttons on the right side of the interface, each representing a different status and its count:
 - New For Review (7)
 - Not Reviewed (2)
 - Reviewed (5)
 - Produced (55)
 - Awaiting Response (1)
 - Direct Produced (2) (highlighted with a red box)

Look up requested items in Google

Request Details (Request ID 166914553)

Source	WSILL	Open Access No links found
Status	Reviewed	
Title / Journal	<input type="text" value="Research in Higher Education"/>	
Uniform Title	<input type="text"/>	Search Google Scholar Search Google Books Search Google
Author	<input type="text"/>	
Publisher	<input type="text"/>	
ISBN	<input type="text"/>	View Holdings
ISSN	<input type="text" value="0361-0365"/>	
OCLC	<input type="text" value="5655830043"/>	

Look up requested items in Google

1 result (0.05 sec)

Female faculty role models and student outcomes
I.Y. Johnson - *Research in Higher Education*, 2014 - Spring
Abstract The idea that female faculty might serve as role models for students is central to studies of the effect of female faculty on female student outcomes. This study tests to aggregation of the measure of student exposure to female faculty at an institution or department, percentage of class members who are female, and percentage of female instructors on female students in a class—existing literature suggests that these factors are related.
Cited by 6 Related articles All 6 versions Cite Save

Create alert

About Google Scholar Privacy

Cite

Copy and paste a formatted citation or use one of the links to import into a bibliography manager.

MLA Johnson, Iryna Y. "Female faculty role models and student outcomes: A caveat about aggregation." *Research in Higher Education* 55.7 (2014): 686-709.

APA Johnson, I. Y. (2014). Female faculty role models and student outcomes: A caveat about aggregation. *Research in Higher Education*, 55(7), 686-709.

Chicago Johnson, Iryna Y. "Female faculty role models and student outcomes: A caveat about aggregation." *Research in Higher Education* 55, no. 7 (2014): 686-709.

Deliver document received by email via Article Exchange

166912146: British journal of ophthalmology.

Did you receive this item?
Date received: Options: Print Book Straps

Request Details (Request ID 166912146)

Source	WSILL
Status	In Transit
Lenders	*NDOAG
URL Type	Article Exchange
URL	G200HA0812P.pdf
	OCLC Article Exchange <input type="button" value="Drop File"/>
Journal	British journal of ophthalmology.
Uniform Title	British journal of ophthalmology (Online)
Publisher	[London] : BMJ Pub. Group
ISSN	1468-2079; 0007-1161
OCLC	41962542

URL Type	Article Exchange
URL	http://oc.lc/q33u3N
	OCLC Article Exchange <input type="button" value="Preview"/> <input type="button" value="Cancel"/>
Password	MVsUCmKs

See complete citation information (borrowing)

Scientific American. (1775222)

Author
Type Periodical
Publisher New York : Munn & Co.
OCLC Number 1775222

Volume 107
Issue/No 3
Issue Date 2012
Pages 100-105

[View Now](#) free

[Search my library's online catalog](#)

Lender String [clear](#) **Quantity** 1 [Update request 167078284](#)

All Holdings **State Holdings** **Regional Holdings**

Filter by: **Custom Holdings Path** Select Year: Volume:

Results 1 - 100 of 5762 Rows 100 << 1 2 3 4 5 >>

Library	Supplier	Days To Respond	Location	Symbol	Group	Cost	IFM	Holdings
ACQUISITION TEST PROFILE	Yes	-	US, OH	ACQ		-		v.1-
AF RESEARCH LAB LIBR	Yes	Copies: 4 days Loans: 4 days	US, OH	SCW		Copies: 0.00 USD Loans: 0.00 USD		260-(1960-)

Save local holdings information (borrowing)

Request Details (Request ID 184564031)

Source	WSILL	Search my library's online catalog
Status	Reviewed	
Title / Journal	<input type="text" value="Higher Education Management and Policy"/>	Local ID <input type="text" value="HD69.P75 D385 2013eb"/>
Uniform Title	<input type="text"/>	Open Access No links found
Author	<input type="text"/>	Search Google Scholar
Publisher	<input type="text" value="Paris : OECD Publishing, 2004."/>	Search Google Books
ISBN	<input type="text"/>	Search Google
ISSN	<input type="text" value="1726-9822"/>	

Print due date on borrowing book strap

TestInstitution (TEST)	DATE	2012
	PAGES	
	ISBN	0062282719
	ISSN	
	PATRON NAME	Jenny Jenny
	PATRON PHONE	555-867-5309
	PATRON EMAIL	jennyjenny@gmail.com
	PICKUP LOCATION	Main Campus Library
	DUE DATE	02/28/2018
	BORROWER	TEST
	SUPPLIER	LEND
	PATRON, PLEASE RETURN ITEM TO:	
	Test Library	
	123 Oak Street	
Anytown, State, US 12345		

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

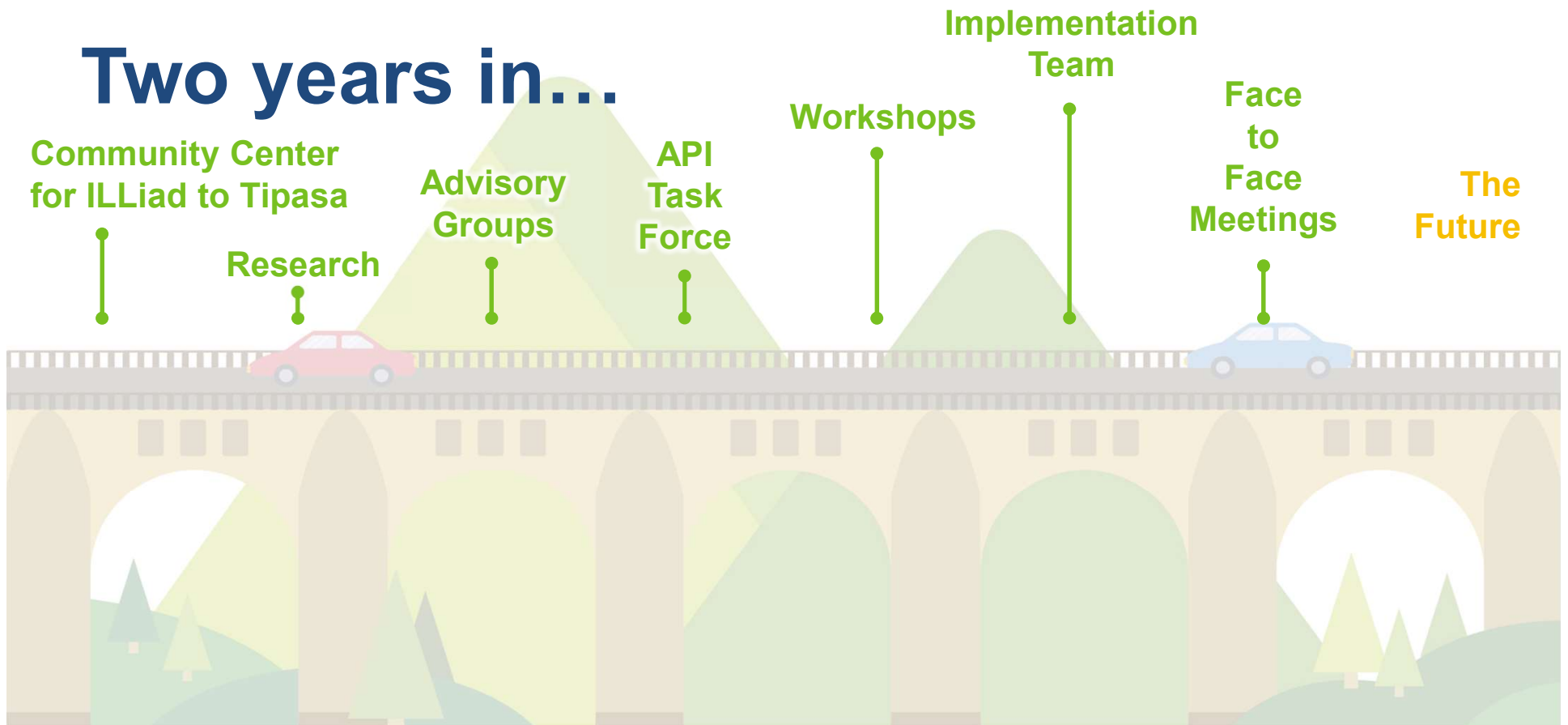
- Receive an email alert when a new request arrives in the lending queue – for infrequent lenders
- Enhanced purchase workflows
 - Specify criteria (e.g., format, year, patron status) for potential purchases
 - Automatically route requests meeting those criteria to purchase workflow
 - Return unpurchased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

TIPASA

Tipasa demo video

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

Two years in...



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

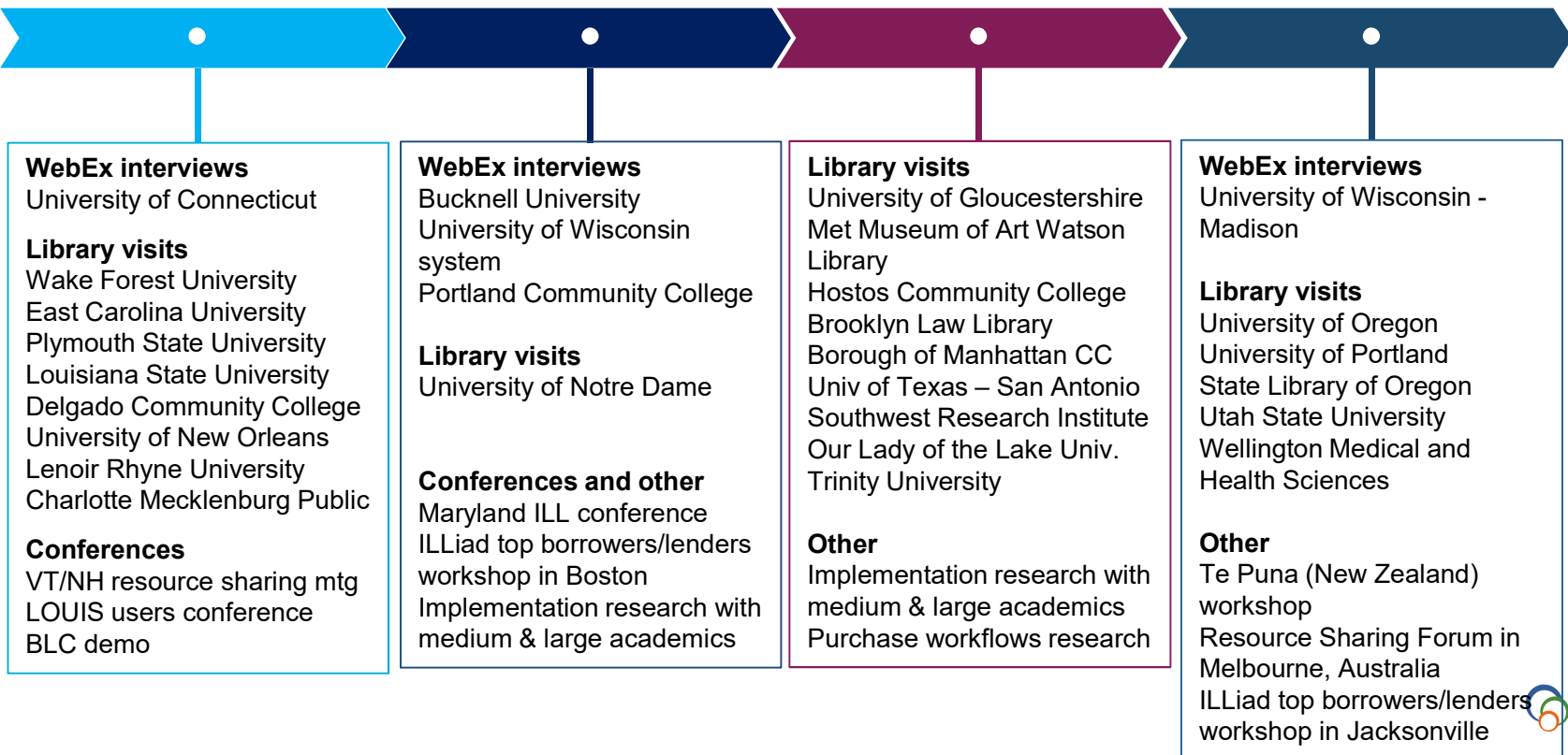
OCLC Resource Sharing team out in the Community

Oct 2017

Nov – Dec

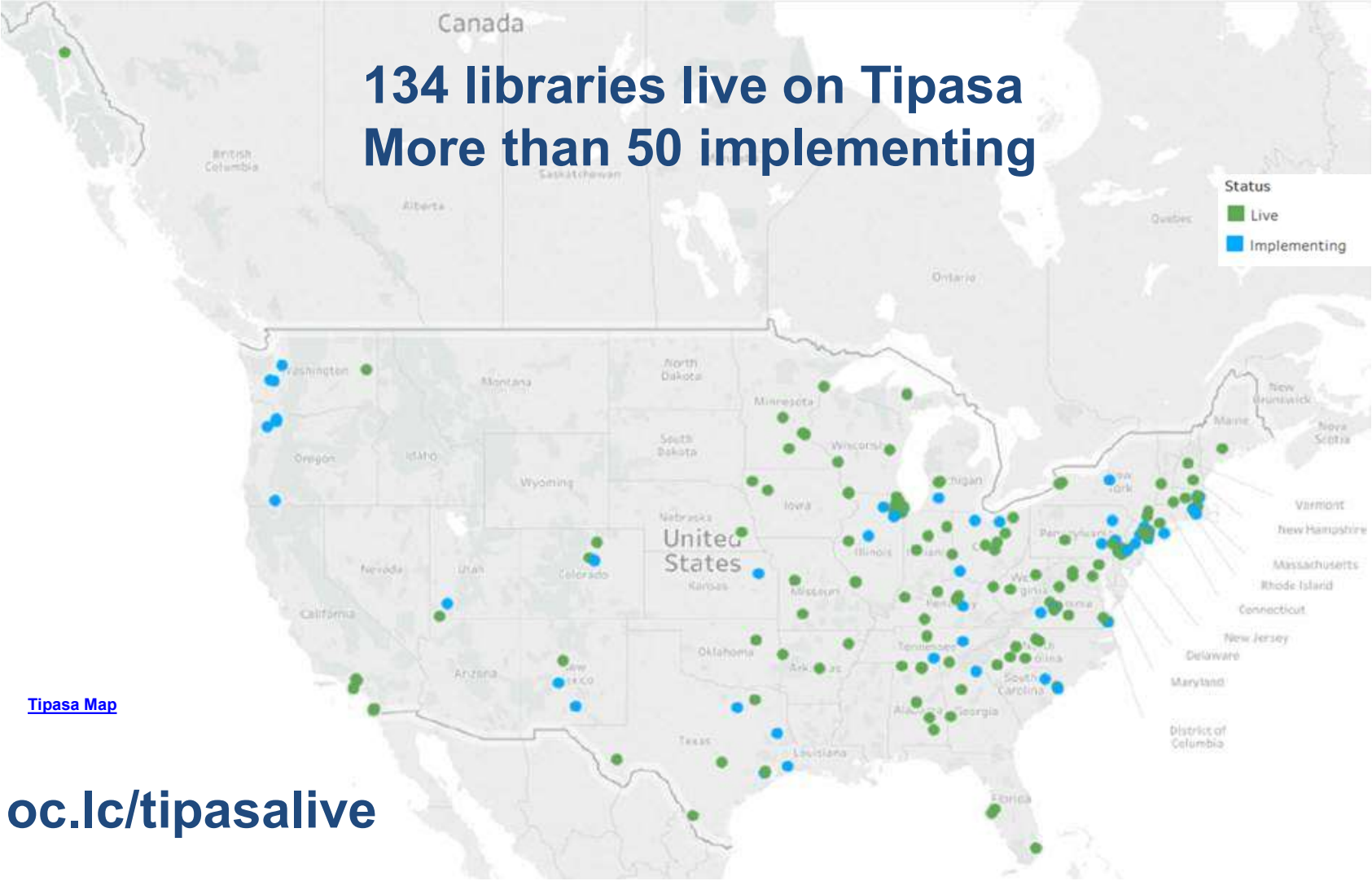
Jan 2018

Feb – March



PHASES & ROADMAPS

134 libraries live on Tipasa More than 50 implementing



[Tipasa Map](#)

oc.lc/tipasalive

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

Tipasa Phases

Phase 1

- Small and medium academics libraries
- Small and medium public libraries
- Generally using ILLiad out of the box (little to no customization)

Phase 2

- Medium academic libraries
- Using RapidILL
- WorldShare Circulation integration
- Reprints Desk

Phase 3

- 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**

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
<p>Purchase Workflow</p> <ul style="list-style-type: none"> 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 <p>Circulation Integration</p> <ul style="list-style-type: none"> Automatically update lending requests in WMS Circulation at Shipped, Received, Returned, and Checked-in 	<p>Patron Data</p> <ul style="list-style-type: none"> Optionally retain patron data on closed requests for up to 5 years <p>Article Exchange</p> <ul style="list-style-type: none"> Deliver files up to 120 MB <p>Local Catalog Integration</p> <ul style="list-style-type: none"> View local holdings and availability information for lending requests 	<p>Printing</p> <ul style="list-style-type: none"> Print book stickers for borrowing and document delivery requests <p>Reprints Desk Integration</p> <ul style="list-style-type: none"> View Reprints Desk price, purchase via IFM, and deliver via Article Exchange <p>Branch Workflow</p> <ul style="list-style-type: none"> Improve workflows for multiple locations, including storage facilities Provide notifications that are specific for a location 	<p>Internal Notes</p> <ul style="list-style-type: none"> Add one or more local notes to a request <p>Additional purchase options</p> <ul style="list-style-type: none"> View Amazon price <p><i>Additional functionality and workflow improvements recommended by the community</i></p>

oc.lc/tipasaphase2roadmap

Tipasa® phase 3 roadmap

Research topics	Targeted for delivery in 2019	Targeted for delivery in 2020
2018 <ul style="list-style-type: none"> • 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 	Additional automation with Direct Request <ul style="list-style-type: none"> • Auto-tagging of requests that meet specified criteria (e.g., year, patron status) Additional search and purchase options <ul style="list-style-type: none"> • Look up items in third-party providers APIs For example: <ul style="list-style-type: none"> • 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 	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 <i>Additional functionality and workflow improvements recommended by the community</i>
2019 <ul style="list-style-type: none"> • Analytics • Manual borrowing workflow • Relais D2D integration • Ongoing research on library workflows 	Circulation integration (NCIP) with Alma (borrowing and lending) Lending request forms (for non-OCLC libraries) New ISO standard	
2020 <ul style="list-style-type: none"> • Billing for lending charges • RapidR • Detailed request history 		

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

oclc.org/illiadtotipasa

Home

Discussions

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FAQ

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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](#)

Bridging Communities

2018 OCLC RESOURCE SHARING CONFERENCE
March 13-15, 2018 • Jacksonville, Florida

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.

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)

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](#)

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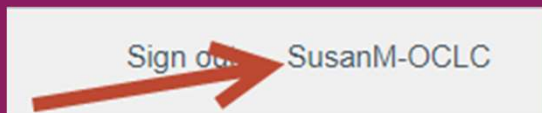
[Come on in, the water's fine](#)

[Making the move to Tipasa: A second panel discussion](#)



Making the most of the Community Center

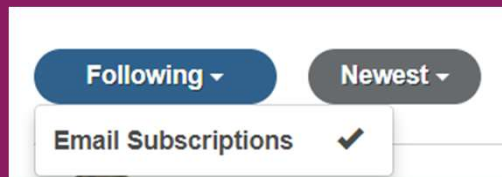
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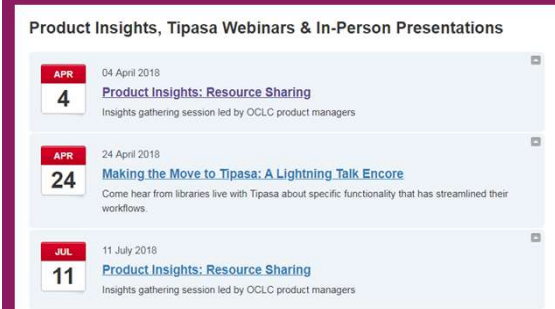
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