OCLC Resource Sharing Solutions
Mary Sauer-Games
Vice President, Product Management

Cathy King
Executive Director, Delivery Services

Clare MacKeigan
Director, Resource Sharing Group Strategy

Jennifer Corsi
Product Manager, Tipasa
Agenda

• Overview of Resource Sharing
  Vision and Product Development
  Philosophy  Mary Sauer-Games
  Cathy King
• D2D Overview and Roadmap  Clare MacKeigan
• Tipasa Overview and Roadmap  Jennifer Corsi
• Q&A

Note: Q&A time will also follow each section
Today’s Resource Sharing solutions

Individual libraries
- WorldShare Interlibrary Loan

ILL management system
- Tipasa
- ILLiad

Consortia / Groups
- Relais D2D
- WMS
Resource Sharing vision

To deliver materials to library users quickly through an intuitive user experience, connected systems, and automated staff workflows.
Future state: Focus on user journey

Wherever their journey starts

WorldShare Interlibrary Loan

To the time they receive their item

Tipasa

Relais D2D

WMS
Three pillars of OCLC’s strategy

- **Speed / Predictability**: Focus on fast and predictable delivery; unmediated for staff
- **User Experience**: Single ‘myaccount’ for user and automation for staff
- **Inter-operability**: Frictionless integration with other systems
Transparency
Community Engagement
Evolving our development philosophy

Transparent • Inclusive • Iterative

User-Centric Mindset + Impactful Collaboration
Our process

WHAT?
- Planning
  - Understanding user needs, goals, priorities, challenges
  - Discussing possible solutions
  - Proposing high-level designs

HOW?
- Design
- Detailed Design
  - Does the solution meet the needs?
  - Is it efficient and delightful to use?
- Coding, QA
Community engagement

**WHAT?**
- Planning

**HOW?**
- Design
- Detailed Design
- Coding, QA

**Two-way dialog:**
- Focus Groups
- Library Visits
- Workshops
- Surveys
- Contextual Inquiry

- Interviews
- Prototyping
- Validation conversations
- Usability Testing
What you can expect

- Increased engagement in the early phases
- Visibility into the planning, design phases
  - Published results from studies
  - Product ‘blogging’
- A discussion
  - How do you want to be engaged?
  - What’s missing?
Questions?
D2D
D2D

End-user discovery with options

Unmediated requesting

Efficient, streamlined staff processing

Library system neutral

High fill rates & fast turnaround times
Twitter and society edited by Katrin Weller, Axel Bruns, Jean Burgess, Merja Mahrt, & Cornelius Puschmann 2014
Held by: DARTMOUTH, UCHICAGO

Twitter and society edited by Katrin Weller, Axel Bruns, Jean Burgess, Merja Mahrt, Cornelius Puschmann 2013
Held by: BROWN

Media and society - a critical perspective by Berger, Arthur Asa 2012
Held by: DARTMOUTH

Media and society - a critical perspective by Berger, Arthur Asa 2012
Held by: BROWN

Critique, social media and the information society edited by Christian Fuchs and Marisol Sandoval 2014
Held by: BROWN, UCHICAGO

Earthquakes and their impact on society Sebastiano D'Amico, editor 2016
Held by: UCHICAGO

Handbook of research on technoself - identity in a technological society Rocco Luppicini, [editor] 2013
Held by: UCHICAGO

Media and civil society in 21st century conflict E.L. Gaston, editor 2014
Held by: UCHICAGO

Mediatized worlds - culture and society in a media age edited by Andreas Hepp and Friedrich Krotz 2014
Held by: UCHICAGO
<table>
<thead>
<tr>
<th>Request Number</th>
<th>Title</th>
<th>Author</th>
<th>Submitted On</th>
<th>Status Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCH-90000779</td>
<td>POWER OF READING - FROM SOCRATES TO TWITTER</td>
<td>FUREDIN FRANK</td>
<td>Jul 19, 2018 11:25 AM</td>
<td>Jul 19, 2018 11:40 AM</td>
<td>Shipped</td>
</tr>
<tr>
<td>UCH-90000776</td>
<td>DIGITAL TECHNOLOGY AND JOURNALISM - AN INTERNATIONAL COMPARATIVE PERSPECTIVE</td>
<td></td>
<td>Jul 11, 2018 08:24 AM</td>
<td>Jul 11, 2018 08:37 AM</td>
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<tr>
<td>UCH-90000775</td>
<td>POWER OF READING - FROM SOCRATES TO TWITTER</td>
<td>FUREDIN FRANK</td>
<td>Jul 11, 2018 08:23 AM</td>
<td>Jul 11, 2018 08:37 AM</td>
<td>Shipped</td>
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<tr>
<td>UCH-90000773</td>
<td>CRITIQUE, SOCIAL MEDIA AND THE INFORMATION SOCIETY</td>
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<td>Jul 11, 2018 08:22 AM</td>
<td>Jul 11, 2018 04:54 PM</td>
<td>On Loan</td>
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<tr>
<td>UCH-90000772</td>
<td>THE ESSENCE OF HAYEK</td>
<td>HAYEK FRIEDRICH VON</td>
<td>Jul 09, 2018 10:20 AM</td>
<td>Oct 16, 2018 02:36 PM</td>
<td>On Loan</td>
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<tr>
<td>UCH-90000771</td>
<td>HAYEK ON LIBERTY</td>
<td>GRAY JOHN</td>
<td>Jul 09, 2018 10:19 AM</td>
<td>Jul 09, 2018 11:35 AM</td>
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<tr>
<td>UCH-90000374</td>
<td>ELEPHANT COMPLEX - TRAVELS IN SRI LANKA</td>
<td>JOHN GIMLETTE</td>
<td>Aug 03, 2016 01:46 PM</td>
<td>Oct 16, 2018 02:33 PM</td>
<td>On Loan</td>
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<tr>
<td>Request Number</td>
<td>Title</td>
<td>Author</td>
<td>Submitted On</td>
<td>Status Date</td>
<td>Status</td>
</tr>
<tr>
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<tr>
<td>UCH-90000779</td>
<td>POWER OF READING - FROM Socrates TO TWITTER</td>
<td>FUREDI FRANK</td>
<td>Jul 19, 2018 11:25 AM</td>
<td>Jul 19, 2018 11:40 AM</td>
<td>Shipped</td>
</tr>
</tbody>
</table>

Title: CROWDFUNDING THE FUTURE - MEDIA INDUSTRIES, ETHICS AND DIGITAL SOCIETY
Author: FUREDI FRANK
Date:[2015]
Publisher:Peter Lang
Edition:
Volume/Issue/Pages: /
Article Link:
Submitted On: Jul 19, 2018 11:25 AM
Need Before:
Due Date:
Status Date: Jul 19, 2018 11:40 AM
Status: In Process

History
<table>
<thead>
<tr>
<th>Request Number</th>
<th>Title</th>
<th>Submitted On</th>
<th>Status Date</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>UCH-90000776</td>
<td>DIGITAL TECHNOLOGY AND JOURNALISM - AN INTERNATIONAL COMPARATIVE PERSPECTIVE</td>
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<td>Jul 11, 2018 08:23 AM</td>
<td>Jul 11, 2018 08:37 AM</td>
<td>Shipped</td>
</tr>
</tbody>
</table>
Unmediated requesting

Routing lists created automatically

• Load balancing
  – Weighting

• Tiers and sequencing. For example:
  – Quick / slow to fill
  – Geography

• No mediation at the requesting library
  – First time staff know about the request is when the item is received
Unmediated requesting

- ILLiad add-on
  - Auto checks consortium resources
  - Builds load balanced routing list
  - No staff intervention at requesting library
Efficient, streamlined staff processing

• At the supplying library staff receive bookbands with all the information needed to retrieve
  – Staff go to the shelf with confidence
Title: CROWDFUNDING THE FUTURE - MEDIA INDUSTRIES, ETHICS AND DIGITAL SOCIETY
Requested By: UCHICAGO PATRON (UCHICAGO)
Publication type: Book
Submitted On: Oct 24, 2018 01:25 PM
Status Date: Oct 24, 2018 01:30 PM
Notes:

Patron Type: Other
Service type: Loan
Need By Date:
Status: S/U - Internal

Barcode | Status
--------|--------
Pending  |

(2 items shipped)
Library system neutral

NCIP with many ILS’s

- SirsiDynix (Horizon, Symphony)
- ExLibris (Alma, Aleph, Voyager)
- III (Polaris, Millennium, Sierra)
- Koha

- CheckoutItem, CheckinItem, AcceptItem, RequestItem *

- Evergreen
- TLC
- OCLC WMS
High fill rates

~95%
Workflows
Workflow Map – User Portion

Patron places request → Confirmation email (opt) → Shipped email (opt) → ILS sends pickup notice → Checkout → Return → Request complete
What’s next
## D2D

<table>
<thead>
<tr>
<th></th>
<th>H2 2018</th>
<th>H1 2019</th>
<th>H2 2019</th>
<th>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Deliver</strong></td>
<td>Export request file integration with UPS tracking</td>
<td>Check requestability before ‘next’ location</td>
<td>Enhanced tiering</td>
<td>Statistical reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enhanced tiering</td>
<td>Batch processing of loans</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>&gt; 50 targets</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>D2D / ILLiad integration</td>
<td></td>
</tr>
<tr>
<td><strong>Planning</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## OCLC Resource Sharing

<table>
<thead>
<tr>
<th>Planning</th>
<th>H1 2019</th>
<th>H2 2019</th>
<th>Future</th>
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</thead>
<tbody>
<tr>
<td>D2D-Tipasa integration</td>
<td>Group to group requesting</td>
<td>Open Access</td>
<td>‘Smart’ fulfillment</td>
</tr>
<tr>
<td>Speed/Predictability</td>
<td>User Experience</td>
<td>Inter-operability</td>
<td></td>
</tr>
</tbody>
</table>
Questions?
User portal

Efficient, streamlined staff processing

Integration with WMS and other systems

Configuration service

Notification service
Patron interface
Your library allows 100 active interlibrary loan requests at a time. If you have reached this limit, you will be unable to submit more requests.

### Interlibrary Loan Requests

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Title</th>
<th>Status</th>
<th>Pickup Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>178514165</td>
<td>Urban life : readings in the anthropology of the city / by George Gmelch; Robert V Kemper; Walter P Zinner</td>
<td>Submitted</td>
<td>Main Library</td>
</tr>
<tr>
<td>178512851</td>
<td>Climate diplomacy from Rio to Paris : the effort to contain global warming / by William Sweet</td>
<td>In transit</td>
<td>Main Library</td>
</tr>
<tr>
<td>178512013</td>
<td>The Journal of nursing education. Nursing Student Perceptions Regarding Simulation Experience Sequencing. by AA Woda</td>
<td>Available to view</td>
<td>Main Library</td>
</tr>
<tr>
<td></td>
<td>South Vietnam : U.S.-Communist confrontation in Southeast Asia by Sobel, Lester A; Kosut, Ha, Epstein, Howard M; Millet, Stanley; Knappman, Edward W</td>
<td>Due 8/16/17</td>
<td></td>
</tr>
</tbody>
</table>
Responsive design
Notifications
<table>
<thead>
<tr>
<th>Message to patron that item is available on the Open Internet with instructions for retrieval.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Manual sending in  ✔️  Automated WorldShare</td>
</tr>
</tbody>
</table>

<p>| Printed copy available for pickup |</p>
<table>
<thead>
<tr>
<th>Message alerting patron that their item is ready to pickup at their chosen Pickup Location.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Manual sending in  ✔️  Automated WorldShare</td>
</tr>
</tbody>
</table>

<p>| Loan available for pickup |</p>
<table>
<thead>
<tr>
<th>Message alerting patron that their item is ready to pickup at their chosen Pickup Location.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Manual sending in  ✔️  Automated WorldShare</td>
</tr>
</tbody>
</table>

<p>| Item about to be due |</p>
<table>
<thead>
<tr>
<th>Reminder to patron that the due date for an item is approaching.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Manual sending in  ✔️  Automated WorldShare</td>
</tr>
</tbody>
</table>

<p>| Item overdue - 1st notice |</p>
<table>
<thead>
<tr>
<th>Reminder to patron that an item is overdue.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Manual sending in  ✔️  Automated WorldShare</td>
</tr>
</tbody>
</table>

<p>| Item overdue - 2nd notice |</p>
<table>
<thead>
<tr>
<th>Reminder to patron that an item is very overdue.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Manual sending in  ✔️  Automated WorldShare</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item overdue - 3rd notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Manual sending in  ✔️  Automated WorldShare</td>
</tr>
</tbody>
</table>
Edit "Additional information required (ILL)"

From Name *: OCLC Demo Library

Reply To Email *: notices@e.worldcat.org

Message Subject *: Additional information needed ${Title}!

Message Body *

Dear ${PatronName},

We require additional information about your request in order to provide you with the item.

ILL Request Number: ${RequestID}
Title/Journal Title: ${Title}
Author: ${Author}
Article Title: ${ArticleTitle}
Article Author: ${ArticleAuthor}
Volume: ${Volume}
Issue/No: ${Issue}
Staff workflows
### Borrowing Requests: Copyright (4)

Batch actions to "Copyright" items [Mark As Fair Use](#) [Cancel Requests](#)

---

**Pledged Copyright Payments Total $24.50**

---

<table>
<thead>
<tr>
<th>Used</th>
<th>ID</th>
<th>Media Type</th>
<th>Title</th>
<th>Patron</th>
<th>Date Requested</th>
<th>Need Before</th>
</tr>
</thead>
<tbody>
<tr>
<td>0(0)</td>
<td>0</td>
<td>0</td>
<td>Gut</td>
<td>Adams, Sally</td>
<td>03/15/2017</td>
<td>04/14/2017</td>
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<tr>
<td>6(5)</td>
<td>174935383</td>
<td>0</td>
<td>Water research</td>
<td>Adams, Sally</td>
<td>03/15/2017</td>
<td>04/14/2017</td>
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<tr>
<td>6(5)</td>
<td>174793675</td>
<td>0</td>
<td>The journal of mental health policy and economics</td>
<td>Jones, Jessica</td>
<td>03/12/2017</td>
<td>03/17/2017</td>
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<tr>
<td>6(5)</td>
<td>174883709</td>
<td>0</td>
<td>Water research</td>
<td>Hooper, Harry</td>
<td>03/09/2017</td>
<td>04/08/2017</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>
Purchase workflow
Purchase workflow
Purchase options

190933127: Dialectical anthropology.

- Copyright Clearance
- Lending Libraries
- Borrowing Library (NDOSU)
- Patron (Corsi, Jen) **Approved**
- Request History

Purchase Options

**Get a Copy**

- **British Library On Demand**
  - Item is not available
  - Refresh

- **Get it Now**
  - Full color, high quality PDF delivered via email in 8 hours or less (normal delivery is usually within 2 hours)
  - Article Fee: $34.00 (Plus Any Applicable Taxes)
# Document Delivery workflow

The image displays a screenshot of a document delivery workflow in a library management system. The workflow includes a list of document delivery requests with details such as ID, status, title, patron, and the date requested and need be date. The system allows for batch actions to manage the delivery process efficiently.
Workflows
Tipasa Workflow
as of 10/22/18
dependent on configuration options, ILS and workflows used
Workflow Map – User Portion

Patron places request → E-mail/text acknowledgement

Request auto produced to lenders

Auto received by system

Supplied via Article Exchange

E-mail/text to patron

Request complete
Where Tipasa is Today

• Expanding feature sets
• Releases every 2 months
• Roadmaps updated quarterly and available through the Tipasa Community Center
• Key integrations in place, more in progress: RapidILL, Get it Now, NCIP interops
Integrations
Submit and fulfill RapidILL copy requests in Tipasa

Tipasa | Rapid user comment
“...the integration between Tipasa and Rapid is easy and seamless.”
Circulation

- NCIP: 4 messages initially
- WorldShare Management Services integration available now
- Ex Libris Alma testing now and will go live in Feb 2019
- Other systems will follow
Where Tipasa is Going

- Reprints Desk
- Internal/staff notes
- NCIP integration with other systems
  - Alma coming Feb 2019
- Improved branch workflows
- DOCLINE integration
- New ISO 18626
- APIs
Tipasa API = Tool set
Tipasa API

• Read / write access to Tipasa data
  – Requests
    • Create, Get, Update (full, partial), List/Search
  – Queues
    • Get, List/Search
  – Request Events
    • Get, List/Search
• Patron-facing tools
What’s next?

• Tipasa API Advisory Group
• URL Specifications
• Item Request XML Schema
• Sample Item Request XML Document
• Error Messages
• Persona Creation
Community engagement

• Library visits – contextual inquiries
• WebEx interviews
• Usability tests
• ILLiad to Tipasa and Tipasa Community Centers
• 3 ILLiad User workshops (Dublin in 2017, Boston in 2017, and Jacksonville in 2018)
• Advisory groups
Phase 3 advisory group members

- Beth Arellano, University of Colorado Boulder
- Meg Atwater-Singer, University of Evansville Indiana
- Terri Bennett, Indiana University School of Medicine
- Marie Berry, Campbell University
- Jami Beserock, University of Florida Gainesville
- Heather L. Brown, University of Nebraska Medical Center
- Vickie Campbell, University of Maryland Health Sciences and Human Services
- Jason Clarke, The Harvard Library
- Hilary Fredette, West Virginia University
- Dori Kim, Fairfax County Public Library

- P.J. Koch, Saint Louis University and Medical Library
- Mary Lucado, Virginia Tech University
- Kurt Munson, Northwestern University
- Xuan Pang, University of Florida Gainesville
- Paria Tajallipour, Texas A&M University Medical Sciences Library
- Robin G. Roggio, University of Arkansas Libraries
- Shirley Thomas, Virginia Commonwealth University
- Gerry Wagner, University of Cincinnati Libraries
- Kate Zdebski, University of Massachusetts Amherst
What’s next
## Tipasa

<table>
<thead>
<tr>
<th></th>
<th>H2 2018</th>
<th>H1 2019</th>
<th>H2 2019</th>
<th>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Deliver</strong></td>
<td>Staff Notes</td>
<td>Unfilled Request workflow improvements</td>
<td>Deliver articles via Article Exchange for Get it Now</td>
<td>Recalls/Renewals (NCIP)</td>
</tr>
<tr>
<td></td>
<td>Purchase UI and Patron summary improvements</td>
<td>Branch workflow support for multi locations and distance patrons</td>
<td>API first iteration</td>
<td>Integration with additional circulation systems</td>
</tr>
<tr>
<td></td>
<td>Integration with Reprints Desk</td>
<td>Circulation integration (NCIP) with Alma</td>
<td>Manual workflows Analytics</td>
<td>Additional API support</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>New ISO</td>
<td>D2D integration</td>
</tr>
<tr>
<td><strong>Planning</strong></td>
<td>DOCLINE integration</td>
<td>Manual workflows</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Billing</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>D2D-Tipasa integration</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Migration Plans
Migration Plans

ILLiad → Tipasa®

- Atlas to provide periodic updates to ILLiad software
- We will work with you to identify your library’s specific needs and identify the best time for you to move to Tipasa
Resource Sharing vision

To deliver materials to library users quickly through an intuitive user experience, connected systems, and automated staff workflows.