

UNIVERSITY OF CALIFORNIA LIBRARIES (UC) TIPASA IMPLEMENTATION PLAN

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Draft UC Tipasa Implementation Plan

Scope Statement

Building on our experience implementing over 10,000 libraries with OCLC Resource Sharing services, this plan outlines the general timeline, scope, roles and responsibilities, major milestones, project overview and success criteria for the UC Tipasa implementation. Our Tipasa Implementation Program is designed to add process, structure, and hands on resources to move the UC VDX System to a new, modernized platform that will meet the needs of UC for years to come. Based on your goals and timelines, we will guide you through each step of your upcoming implementation.

Goals

OCLC will work with UC to migrate all UC libraries within our agreed upon timeline. During the implementation period, libraries will:

- Explore available features in Tipasa via live demonstration, cohort sessions and training opportunities, as well as opportunities for support, e.g. OCLC documentation, Community Center
- Optimize the interlibrary loan experience for library users and streamline workflows for library staff, by using automations and Article Exchange in conjunction with the library's policy data, lending history, licensing agreements, and format preferences
- Configure Tipasa fulfillment integration with Alma, especially with regards to the Primo patron experience.
- Partner with OCLC product teams on any ideas that would help improve the UC experience with Tipasa.

Roles and responsibilities

OCLC's Tipasa Implementation Team

- Lead Implementation Manager
- Tipasa Implementation Team
- Training and User Education Team
- OCLC Resource Sharing Product Team
- **Role:** To get the UC member libraries to success with the UC Tipasa Service. Coordinate all activities related to the UC Tipasa Service.
- **Responsibilities:** To provide detailed project plans and expert implementation service in support of the UC implementation, and to coordinate training and configuration activities.

UC's Tipasa Implementation Team

- Lead implementation contact(s)
- Library contacts
- **Role:** To assist OCLC's Implementation Team in implementing UC Tipasa Service with agreed upon features and functionality within an agreed upon timeframe. Manage UC's transition/roll-out activities within UC libraries.

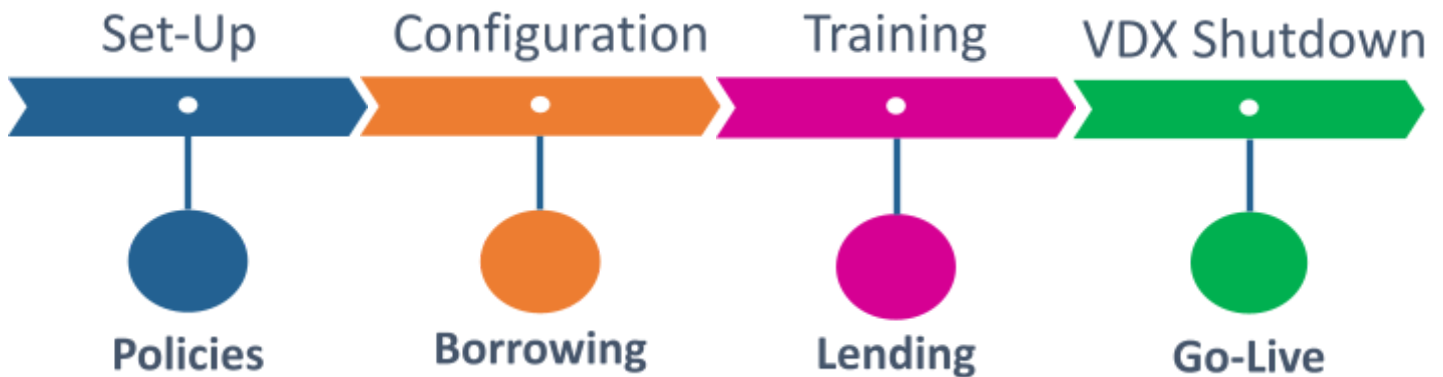
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- **Responsibilities:** To represent UC in working with OCLC's implementation and product teams, to deliver data, attend project meetings, review project plans and development requirements, communicate issues, determine policies and configuration settings, and perform acceptance testing.

Timeframe

- We anticipate a three-to-four-month timeline for a successful implementation, which will include configuration optimization and a system review for the libraries. The largest time commitment will be the weekly cohort sessions, as well as the training sessions which complement skills learned during the cohort sessions. During this timeframe we will work with you to:
 - Gather information to inform detailed planning and prepare the libraries for migration
 - Discuss goals and timelines
 - Review tools used during implementation, such as Basecamp
 - Establish next steps and deliverables
 - Discuss longer-term implementation strategy for migrating libraries



Activity	Potential time commitment (in hours)
Welcome call	1
Kick-off	1
Attend workshop/training sessions	4
Attend cohort implementation sessions	Up to 5
Attend Office Hours to ask questions and work on configurations	Up to 2
Attend Usage Statistics sessions	Up to 3
Configuration of Alma	Varies by library
Total	Up to 17 hours + Alma configuration

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Note: This estimate is a baseline. While cohort sessions and trainings will take up to 17 hours, this does not include the time individual libraries may take completing go live checklist activities, as those will depend on the individual libraries.

Detailed Implementation

Implementation meetings

UC representatives will meet via Microsoft Teams with your OCLC implementation project manager to discuss implementation status, milestones, change requests, schedule needs and more. Throughout the implementation, meetings will be scheduled to review content and milestones. During these meetings, the UC implementation team will review and provide OCLC with feedback regarding the completion of project milestones.

Implementation set-up

The OCLC implementation team, working with the UC's implementation coordinator and the UC libraries, will work to ensure set-up of the following:

- Configure your library's Tipasa settings, including general preferences, constant data, custom holdings, print settings, lending policies, borrowing policies, automation, and deflections.
- Review article exchange configuration and copyright.
- Integrate Tipasa with Alma/Primo for Fulfillment Integration (including NCIP) and Real Time Availability.
- Configure custom email notifications and templates for various ILL activities.
- Ensure that you have the reports that you need for your library's activity.
- Set up user authentication methods, such as SAML, to ensure secure access to Tipasa. (optional)

User on-boarding

Participants: OCLC and UC's implementation representative

Training Participants: OCLC's Training Coordinators and the UC member libraries' Tipasa staff

- OCLC Training will meet with the library's core implementation team early in the implementation process to establish the training timeline for all libraries, identify specific cohort groups and recommend appropriate courses of Tipasa training. Recommended topics include Basic overview of Tipasa, Advanced Lending Options and Copyright Management.

Go Live

Participants: OCLC Implementation team, UC's implementation coordinator and UC member libraries.

OCLC and UC's implementation teams (Virtual)

- Go Live readiness review
- Final configuration adjustments
- Library staff access verification and role/permission adjustment
- Rollout support – OCLC implementation team will support during initial rollout

Ongoing support

Participants: OCLC, UC's implementation team and the UC member libraries.

- **A formal transition** from an active implementation status to ongoing support will be coordinated by the OCLC implementation lead as the libraries are live with Tipasa.

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- **OCLC Customer Support** is available to you via phone, web form and email.
- **Tipasa training** remains available and part of your subscription cost to your entire group's library staff, including training on new features.
- **The OCLC Community Center** enables the UC member libraries' staff who use Tipasa to find information they need in one place 24/7 via a web-based portal, including product updates, documentation, training and tutorials, news, upcoming events, enhancement requests, and discussion boards.

Draft Schedule

Participants: OCLC, UC's implementation team and the UC member libraries.

Note: These dates are tentative; final dates will be selected in conjunction with the libraries

Sessions to Attend / Project Milestones	Goals/Objectives	Date/Lead	Follow-up Tasks
Welcome call (for team leads and OCLC implementation staff)	Introduce key players. Discuss implementation process, goals and expectations, workflows	Monday, 2/17/2025 OCLC Implementation	Attend all future meetings
UC Kickoff session (for library staff working with Interlibrary Loan)	Discuss timelines, demonstrate project tools, consider possible third-party authentication needs	Monday, 2/24/2025 OCLC Implementation	Log into Tipasa. Create/update staff accounts and roles. Review VDX-Tipasa implementation checklist.
Training session 1: Introduction to Tipasa	Overview of Tipasa	Tuesday, 2/25/2025 OCLC Training Team	Identify any questions concerning Tipasa implementation and workflow changes
Cohort Session 1: Core Tipasa Resource Sharing Functionality	Introduction to the Policies Directory. Review constant data, Custom Holdings Groups and Paths, and deflections	Monday, 3/3/2025 OCLC Implementation	Work on the VDX-Tipasa checklist. Review constant data records, custom holdings groups and paths, and deflections. Configure print settings.
Training session 2: Advanced Lending	Overview of advanced lending options in Tipasa	Tuesday, 3/4/2025 OCLC Training Team	Work on the VDX-Tipasa checklist. Do practice lending exercises
Cohort session 2: Advanced Lending	Discuss Article Exchange. Learn about automations. Discuss optional advanced workflows	Monday, 3/10/2025 OCLC Implementation	Identify opportunities for automation. Set up Article Exchange. Decide if using advanced workflows, then enable as necessary.
Automations workshop	Discuss and create necessary automations	Monday, 3/17/2025 OCLC Product Team	Set up automations necessary for fulfillment integration
Cohort session 3: Fulfillment integration in Tipasa	Policy considerations, configuration in Tipasa and Alma	Monday, 3/24/2025 OCLC Implementation	Decide borrowing and lending policy workflows. Set up Tipasa

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			configurations. Enable Circ integration in Tipasa. Work with Alma to enable NCIP integration.
Sessions to Attend / Project Milestones	Goals/Objectives	Date/Lead	Follow-up Tasks
Training Session 3: Copyright Management	Review copyright management in Tipasa	Tuesday, 3/25/2025 OCLC Training Team	Set up copyright management, review impact on patron-initiated requesting
Office hours for Tipasa Integration with Alma	Q & A for Tipasa/Alma circ integration	Monday, 3/31/2025 OCLC Implementation	Work on configurations for Alma
Office hours for Tipasa Integration with Alma	Q & A for Tipasa/Alma circ integration	Monday, 4/7/2025 OCLC Implementation	Work on configurations for Alma
Tipasa fulfillment integration testing with Alma	Test connections between Tipasa and Alma	Monday, 4/14/2025 OCLC Implementation	Test Alma circ integrations for subscribers
Tipasa fulfillment integration testing with Alma	Test connections between Tipasa and Alma	Monday, 4/21/2025 OCLC Implementation	Test Alma circ integrations for subscribers
Cohort session 4: Preparing to Go Live	Review final steps to move from VDX to Tipasa	Monday, 4/28/2025 OCLC Implementation	Complete VDX-Tipasa checklist
Go Live preparation	In Tipasa, cancel as many "Not reviewed" and "source=VDX" requests as possible. In VDX, process and complete as many borrowing and lending requests as possible prior to going live	4/28/2025- 6/27/2025 OCLC Implementation	Schedule complete VDX Shutdown procedures- See "Categories of requests to move off VDX" section for more information (subject to change). OCLC will remove the ISO requester (borrowing) and the ISO Responder roles (lending) from your institution's profile so new requests will appear in Tipasa.
Go Live Day	Begin managing all new borrowing and lending requests in Tipasa	Friday, 6/27/2025 OCLC Implementation	This date is flexible

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Usage Stats session	Review Usage Statistics for individual libraries and for the group	TBD OCLC Implementation	View Usage Statistics recording. Review documentation on group report designer options.
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Categories of requests to move off VDX

Participants: OCLC, UC's implementation team and the UC member libraries.

In evaluation of existing VDX requests, the following categories of requests exist today. Each category is evaluated as to whether it can be moved off VDX in advance of the Tipasa implementation to reduce the number of requests outstanding in VDX at Tipasa go-live. UCs should evaluate the categories and the recommended workflows. Depending on the workflow and number of requests in each category, UCs may consider certain categories higher priority.

	Category/Subcategory	Strategy	Can do in Tipasa?
BORROWING			
1.	□ Requests with other UC libraries	<i>Move these requests to Alma</i>	Any that cannot be completed in Alma could use Request Transfer
2.	□ Requests with WSILL lenders	<i>Track these requests in WSILL:</i> • Turn off ISO integration with VDX • De-ISO existing requests to complete in WSILL from current status • New requests come in via Request Transfer • Process fulfillment manually until Tipasa	Yes
3.	□ Requests with non-WSILL lenders	Track in WSILL • Can configure z39.50 for these partners • ARM can send off-system request OR ISO 18626 (where available)	Yes
4.	□ Email requests	Start tracking these in WSILL (staff send via Request Transfer)*	Yes, with off-system requesting
5.	□ Purchase Requests	Track in WSILL	Reprints Desk integration is available
6.	□ "PDFs found online"	Track in WSILL	Tipasa tracks OA in Doc Del – would mean difference in stats between the WSILL and Tipasa-processed requests.

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7.	□ “Dummy requests”	<i>Similar to email requests; start tracking these in WSILL (staff send via Request Transfer)*</i>	Yes, with off-system requesting
8.	□ Non-OCLC ILL Libraries	Track in WSILL	Lending Request form and off-system partners in ARM-built lender strings enhance off-system

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LENDING			
9.	□ Lending to WSILL borrowers	Track in WSILL • Turn off ISO lending between WSILL & VDX • Respond to lending requests in WSILL (de-ISO requests previously sent to VDX to finish in WSILL)	Yes
10.	□ Lending to non-WSILL borrowers	Track in WSILL	Set borrowers up with account for lending request form and instructions for submitting their own requests in future.

ABOUT OCLC

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