Today's agenda

1. Who are we?
2. Where did we come from?
3. Where did we go?
4. What happened next?
5. OK... now what?

Overview: Ontario Council of University Libraries (OCUL)

- 8 central staff
- Includes the libraries of universities in Ontario
- Universities vary significantly
- "Public" = 30% of budget comes from government
- Ontario = very big place
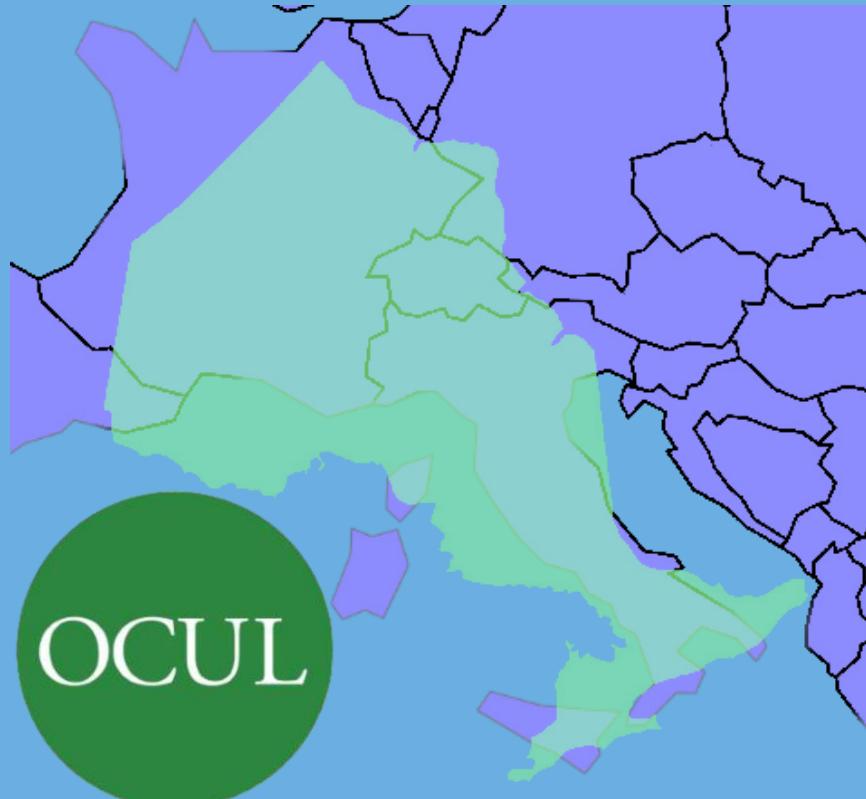
OCUL

Overview: Scholars Portal

Scholars Portal is the digital infrastructure arm for OCUL

- About 30 staff including librarians, developers, system administrators, and data analysts

- Provides a wide variety of online library services that support OCUL's mission, operations, and core principles

Scholars Portal
A Service of the Ontario Council of University Libraries

OCUL & Resource Sharing Timeline

1967 - OCUL creates a resource sharing network of station wagons that drive across the province delivering books

1990s - OCUL supports & coordinates members' purchase and use of resource sharing technology like AvisoILL

2003 - Scholars Portal, launches RACER, a consortially hosted instance of VDX

2021 - OCUL launches an Automated Fulfillment Network in our shared Alma Network Zone

What is VDX?

- Virtual Document eXchange software

- Developed by Fretwell-Downing in the 1990s, later purchased by OCLC

- Currently sunset(ting)

What does VDX do?

- VDX provides:

  - Centralized discovery portal using Z39.50

  - Requesting and lending within the consortium

  - Requesting and responding to requests from outside the consortium

  - Support for multiple library locations per institution

What does VDX not do?

- VDX does not provide:
  - Bilingual staff interface
  - Ability to pick up requested materials at a third location
  - Integrated document delivery features
  - Integrations with local circulation systems/accounts

OCUL's VDX Implementation

- VDX was installed on servers owned and managed by Scholars Portal

- Scholars Portal provided training and support

- 1-2 VDX leads from each institution helped make operational decisions (but not formal policies)

- A mailing list allowed all library staff who used VDX in their work to share information

Scholars Portal RACER

VDX at OCUL: How did it work?

- Centralized configuration: most config was done centrally for all institutions

- Individual institutions' config was also done by Scholars Portal

- OCLC managed software development, but Scholars Portal managed upgrade schedule and developed add-ons

- When support was required, staff contacted Scholars Portal first; OCLC looped in when necessary

OCUL's Alma Implementation

- Alma is cloud-based software.
- Each university library has its own Institution Zone (IZ)
- OCUL has a Network Zone (NZ), currently with 19 member IZs
- Each institution has a minimum of 2 Institution Leads (ILs) that are the primary contacts and a mailing list to contact them all.
  - ILs are not chosen centrally, they are chosen by their institution – not always technically minded and may not work in config

What is Alma Resource Sharing?

Alma Resource Sharing (aka Interlibrary Loan) is the general terminology for requesting materials to be fulfilled by other institutions

- Patrons cannot easily search collections from elsewhere
- Requests go from the patron's library to the item-owners
- Each institution decides what materials are available
- Requests are not specific to an exact item
- Requests only go to libraries where the item shows on locate profiles

What is an Automated Fulfillment Network?

An Automated Fulfillment Network (AFN) is a group of Alma institutions connected via a Network Zone
- Patrons can search collections across the network and request physical items
- Requests go directly to the item-owning library, without local mediation for pickup anywhere among members
- Requests are for a specific item (not for "any edition")
- Requests only go to libraries where the item is available (on shelf) and actually requestable

OCUL's Alma Resource Sharing implementation

- Default configurations are made available from the NZ
- Policies put in place for certain aspects (such as the AFN)
- IZs have agency over their terms of use and what they share
- Work was done centrally to create detailed config docs and Institution Leads were asked to implement
  - Updates are sent out with requests for local implementation
- Partners and top level rota are managed at the NZ level

Why are you sending this to me?

- ILs usually come from other areas of the library and don't know much about resource sharing
  - When they knew VDX, they are confused because they are used to the central config model
  - Sometimes, they don't even realize that they aren't the only ones
  - Sometimes, they forget they need to pass it along
  - Sometimes, they may not have read the 2-3 emails leading up to the one they are confused by

Where did it all go wrong?

While we are able to figure out new configuration fixes and improve the way Alma works, we have to rely on our ILs to implement things on schedule…

… not all of our libraries have the capacity to do so

We are currently unable to push all of the configuration centrally, and even where we are able, our current policies do not allow for it

Help! (I need somebody)

Support. Support. Support.

- We have a mailing list for support within our membership.
- We make ourselves available to do central triaging of issues.
- We ask people to submit support tickets and add our central office (aka me) to those tickets.
- We ask people to communicate when they have an issue...

But do they? **Well...**

Fixing a hole...

- We needed to do more change management around how things *worked* - most of our change management was just about the software
- We thought that by moving to a cloud vendor, the problems would all be moved to their level and we would not have to do as much support and tinkering with the system. Boy, were we wrong!
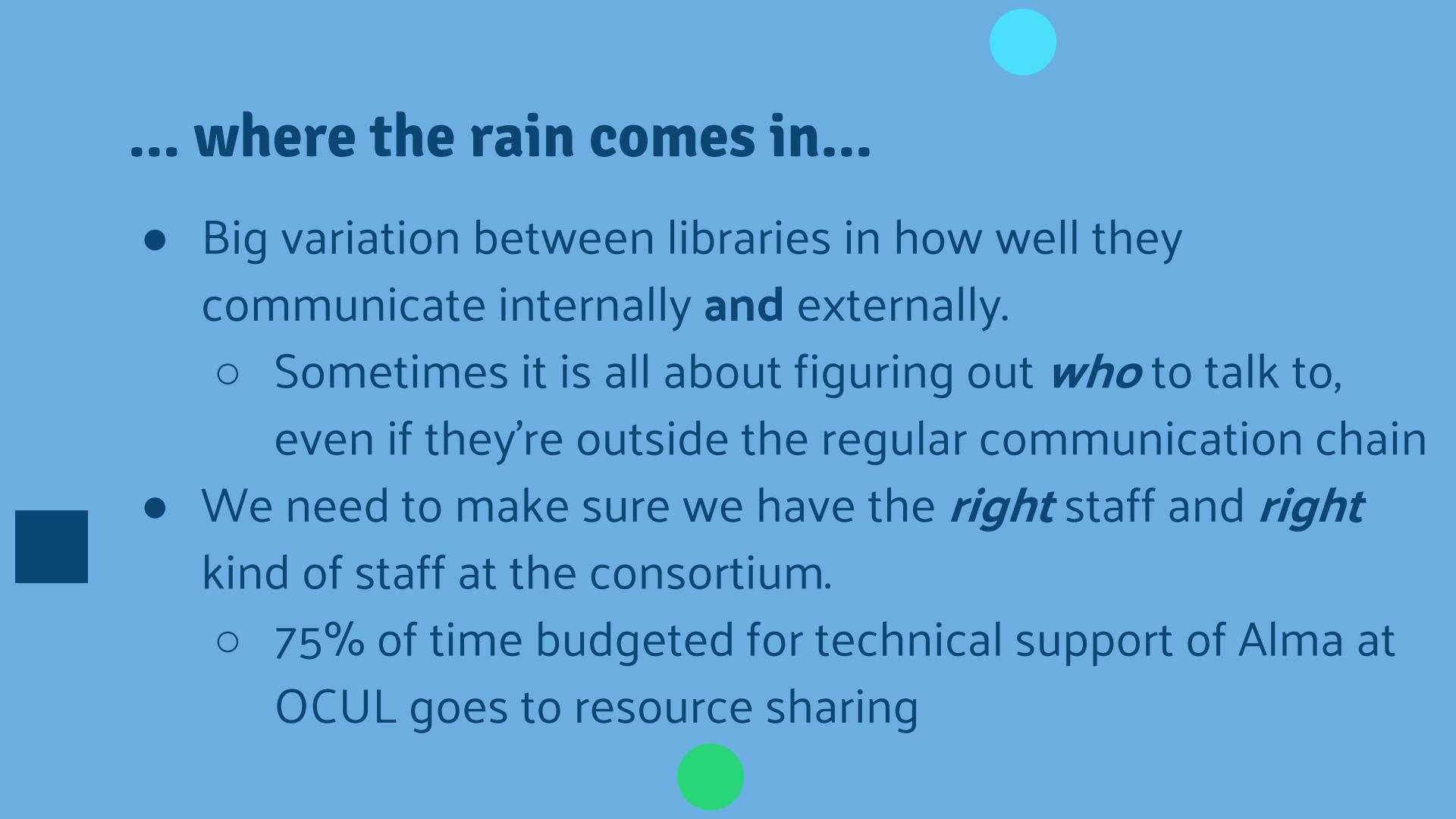
… where the rain comes in…

- Big variation between libraries in how well they communicate internally **and** externally.
  - Sometimes it is all about figuring out *who* to talk to, even if they're outside the regular communication chain
- We need to make sure we have the *right* staff and *right* kind of staff at the consortium.
  - 75% of time budgeted for technical support of Alma at OCUL goes to resource sharing

Who are we really?

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