Collaborative Futures

2020 Annual Report

Omni Year 1

OCUL Ontario Council of University Libraries

••• omni

Introducing our First Annual Report

How can academic libraries adapt and respond to the challenges of today, from rapid developments in information technology, to the transformation of scholarly communication? Perhaps more importantly, how can we, as university libraries, support and collaborate with one another as we navigate the changing landscape of publishing and higher education? These questions inspired conversations between Ontario's university libraries dating back to 2013, conversations which eventually led to the formation of a radical collaboration known as Collaborative Futures.

Collaborative Futures, an initiative of the Ontario Council of University Libraries (OCUL), is built on a vision for a distributed and shared collaborative approach to print and electronic resources management. One key outcome of this collaboration is the creation of a shared library services platform (LSP). After six full years of planning, this came to fruition at the beginning of 2020, when 14 of our members launched a shared LSP, known as Omni.

This report highlights the accomplishments of Collaborative Futures and Omni in a year of unprecedented change. As COVID-19 moved our libraries into a primarily-remote environment in March 2020, there are increased benefits of cross-institutional communication and collaboration. The shift to a shared LSP has allowed Omni partner institutions to come together to problem solve, learn and adapt to the needs of our libraries and users. Omni enabled partner libraries to adapt their services in the early stages of the pandemic, such as streamlining the process for requesting the digitization of physical items. The network of experts supporting Omni allowed partners to share adjusted workflows, configuration and service adaptations with colleagues across the province, quickly and broadly. Despite the challenges that have come with 2020, we have continued to work together to grow our Collaboration, welcoming two new partner institutions in the Fall.

2020 was a year like no other, and we are proud to share our accomplishments for the first year of Omni, an initiative that has been over 6 years in the making. The vision for radical collaboration would not be possible without the creativity and work of both OCUL staff and staff across all of our member libraries. Thank you to everyone who has worked to make this vision possible.

Pascal Calarco
Chair, Collaborative Futures Steering Committee

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Timeline and Milestones

2013

OCUL Next Generation Library Platform Summit begins the conversation.

OCUL initiates Collaborative Approaches Task Force.

2014

A feasibility study is completed and with support from OCUL Directors, Collaborative Futures is born.

2015

System requirements are developed and preparation begins for the procurement of a shared system.

2016

13 Universities agree to take part in Collaborative Futures with another 3 indicating ongoing interest.

2017

Procurement and implementation of a shared library service platform (LSP) at participating libraries begins.

Established a governance structure, steering committee, 6 subcommittees, and a number of working groups.

2018

OCUL selected the Ex Libris Alma® library services platform and Ex Libris Primo® discovery and delivery solution as the core platforms for its Collaborative Futures initiative.

2019

Omni academic search tool offered at the 14 participating OCUL member institutions from December 2019.

2020

Algoma University and Laurentian University launched Omni bringing the total participating OCUL member institutions to 16.

Partners

Algoma UNIVERSITY

Brock University

Carleton UNIVERSITY

UNIVERSITY of GUELPH

Lakehead UNIVERSITY

Laurentian University / Université Laurentienne

NIPISSING UNIVERSITY

OntarioTech UNIVERSITY

u Ottawa

Queen's UNIVERSITY

TRENT UNIVERSITY

UNIVERSITY OF WATERLOO

Western UNIVERSITY · CANADA

LAURIER Inspiring Lives.

University of Windsor

YORK UNIVERSITÉ UNIVERSITY

OCUL Ontario Council of University Libraries

Governance and Committees

The Collaborative Futures initiative is driven by the participation and contributions of staff from all partner libraries.

Significant work happens at the local level, and is supported by the Steering Committee (CFSC), Operations Team which includes OCUL central staff, and a set of standing subcommittees and working groups. The subcommittees and working groups work on behalf of the partners to investigate and address shared issues and develop shared policies in key functional areas. These groups include:

Subcommittees

- Communications (CFCOMM)
- Discovery and User Experience (CFDUX)
- Metadata Management and Standards (CFMMS)
- Shared Policy (CFSPWG)
- Shared Resources (CFSR)
- System and Analytics (CFSA)

Working Groups

- Analytics Working Group: Works on a variety of analytics-based consortia projects such as identifying shared reporting requirements and recommending policies and processes related to analytics.
- OCUL Usage Right (OURII) Working Group: Charged with drafting a best practices guide outlining preferred policies for reading, interpreting and entering OCUL usage rights data into Alma.
- E-resources Acquisitions Working Group: Explores and assesses possibilities for centralized eResource acquisitions and activations for the collaboration.
- Network Zone Metadata Management Working Group: Work in consultation with CFMMS to maintain and improve the quality of MARC (cataloguing) data shared across partner institutions within Alma.

The work of these groups is informed by the **Expert Advisory Network (EAN)**, a collection of individuals from across the collaboration with expertise in key library functional areas. Active and continuous consultation with the EAN ensures the needs of all partners are considered and expert knowledge is shared across the collaboration.

Ultimate decision making and strategic guidance lies with the **Collaborative Futures Directors (CFD)**, comprised of University Librarians from each of the participating institutions.

Introducing Omni

Omni first launched at 14 participating Universities in December 2019 and January 2020, then celebrated the launch at 2 additional Universities in December 2020. Omni partners were provided with supporting materials, such as a Communications and Branding Toolkit, to assist in promoting the new shared system. To ensure a cohesive and consistent searching experience across Omni libraries, Omni recommended configurations were adopted by all members. Providing users with the ability to search across all institutions in a unified interface was one of the original intentions of Collaborative Futures.
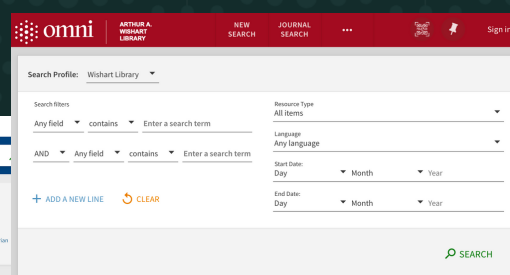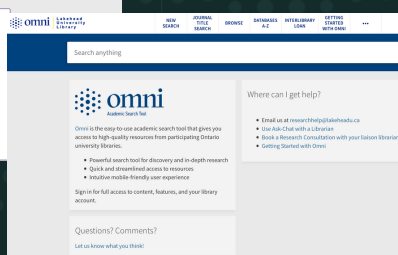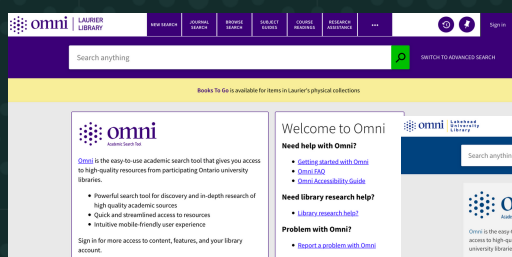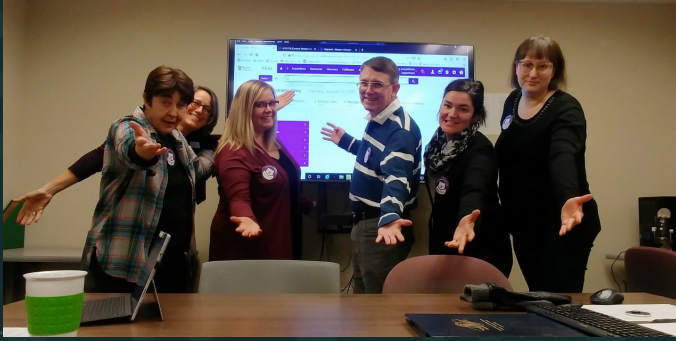
Western University

Queen's University

University of Waterloo

Wilfrid Laurier University

Nipissing University

Celebrating the Omni Launch

The Omni Network

4 working groups   **6** subcommittees   **16** partners

667,113
new physical resources

23,522,374
total physical resources

Most Omni Partners have...

- Enabled single-sign-on authentication to Omni.
- Enabled import profiles for vendors, eliminating some time-consuming manual processes.
- Configured Omni to enable curbside pickup of physical resources.
- Configured Omni to enable digitization requests.

8 **Access to Course Reading Lists**
Omni partners are delivering physical reserves via the Alma Course Reserves module, which makes course readings lists searchable in Omni.

12 **Collection Discovery**
Omni partners have used the Collection Discovery feature in Omni to create digital displays of resources.

Enhanced Accessibility

Enhanced AODA compliance for discovery (WCAG 2.0 AA)

Embedded Search Bar

All Omni partners embedded search boxes onto website landing pages.

Top

10

Countries

Canada tops the 2020 list of searches by country, but in a year of remote work and studying, hundreds of thousands of Omni searches can be seen around the world.

Legend:
- >1,000,000
- 100,000 - 999,999
- 20,000 - 99,999
- 10,000- 19,999
- <10,000
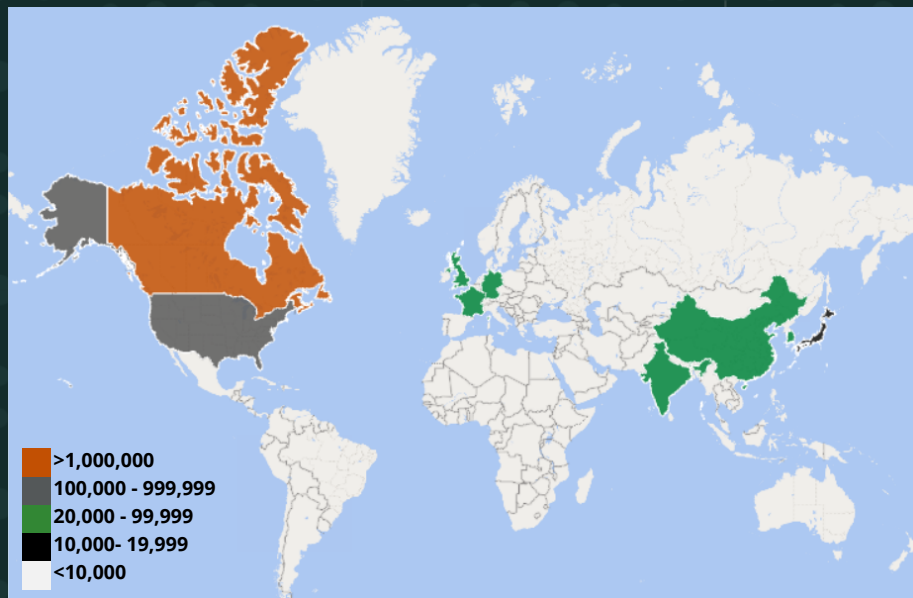
Country	Searches
Canada	19,607,057
United States	590,348
China	56,879
United Kingdom	47,485
France	34,231
India	30,889
Korea	23,946
Germany	23,571
Hong Kong	19,450
Japan	12,963

Omni Searches by Month

Number of Searches vs Month

- Basic Search
- Advanced Search
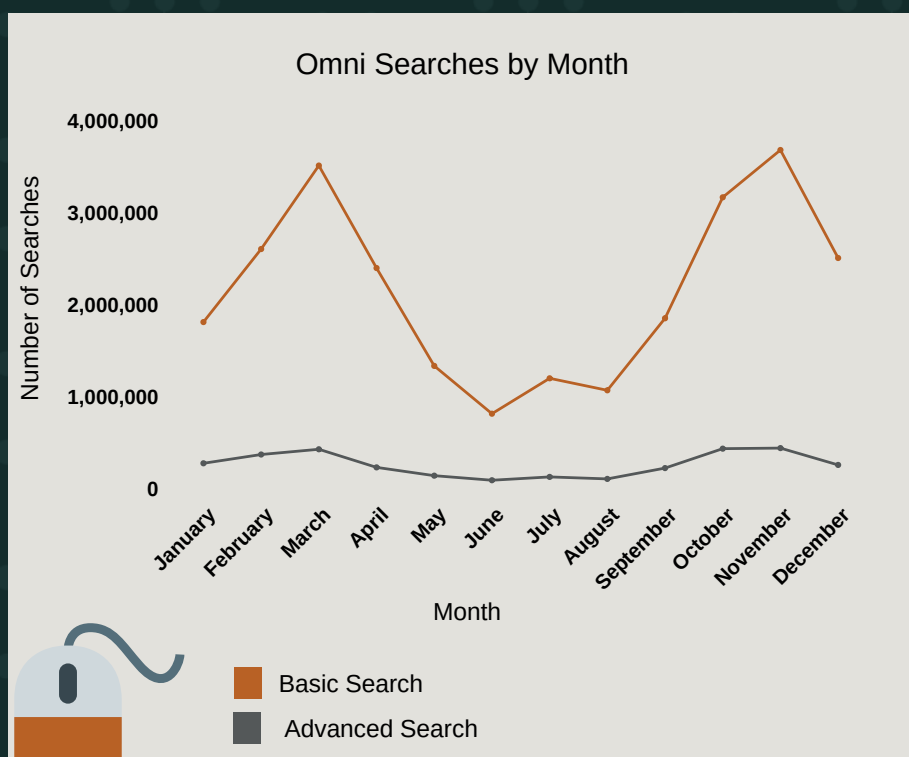
Searches Completed in Omni

In 2020, a total of 26,025,777 basic searches and 3,154,721 advance searches were completed in Omni.

Data has been compiled from Omni partner library submissions

Continued Collaboration

in an unprecedented year

The idea of moving to a shared library system grew out of a desire to continue to improve our ability as Ontario university libraries to collaborate and support one another. Leading up to the launch of Omni, members collaborated with one another as they planned for and led the implementation. After the launch of Omni in 2020, members were able to reimagine how the collaboration could support their work locally and consortially.

CFDUX Mini-Conference

With over 340 attendees, this virtual mini-conference, hosted by the Discovery and User Experience Subcommittee (CFDUX) provided member libraries a chance to share their knowledge of Omni. Sessions in this conference included:
- Digitization Request & Unpaywall (Alex Fletcher, Queen's University)
- Omni search results with CDI: Practical benefits from usability conversations with Laurier (Mark Weiler, Wilfrid Laurier University),
- Report an Issue & OUR Licenses (Matt Van Ast & Juliene McLaughlin, University of Guelph)
- Sending out an SOS: Brock's 'Get help finding a digital copy' workflow (Monica Rettig & John Dingle, Brock University)
- Making research possible in a pandemic with the help of Rapid ILL (Nicole Sikkema, Queen's University)

Drop-in Knowledge Sharing Meetings

- Cataloguing Chats: Hosted by Metadata Standards and Management Subcommittee, these drop in calls provide an opportunity for anyone interested in cataloguing and metadata in Alma a virtual space to come together, share information and problem solve.
- Monday Drop-in Calls: Near the beginning of the system implementation period, these weekly calls created a space for Implementation Teams at the member libraries to check in and ensure everyone had reached important milestones. In the past year, these calls have continued, often centering around a specific theme or topic.
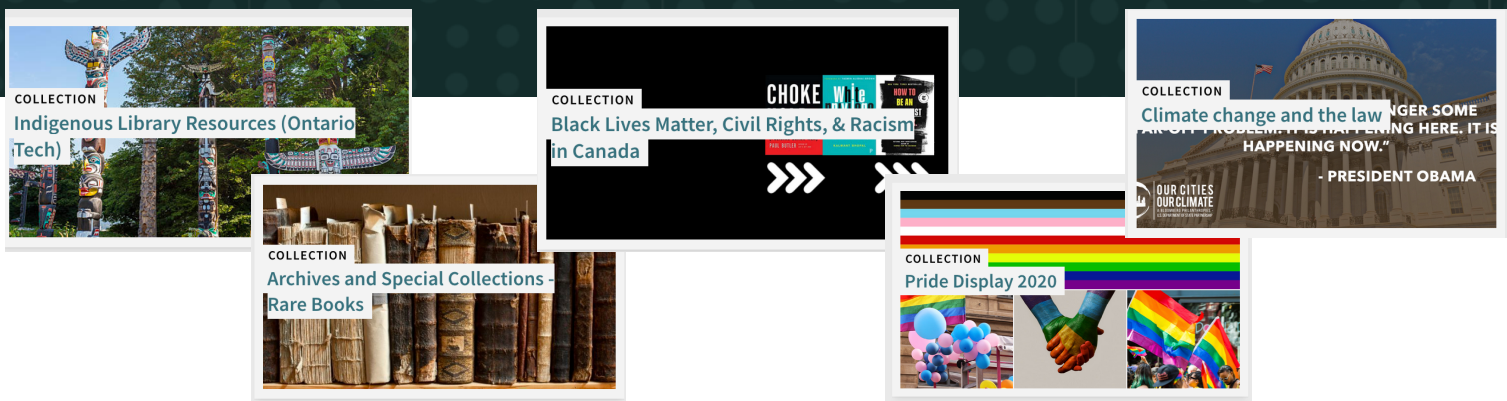
Local Implementation Highlights

Lakehead University

Moving to a shared library services platform has created many opportunities for collaboration and knowledge sharing. In addition to improving communication between partners, the platform has provided libraries with the opportunity to improve current workflows and explore new tools and opportunities. From creating new virtual library displays to showcase collections, to creating new mechanisms for problem reporting, this section highlights the ways Omni and Alma have been implemented locally at our member libraries.
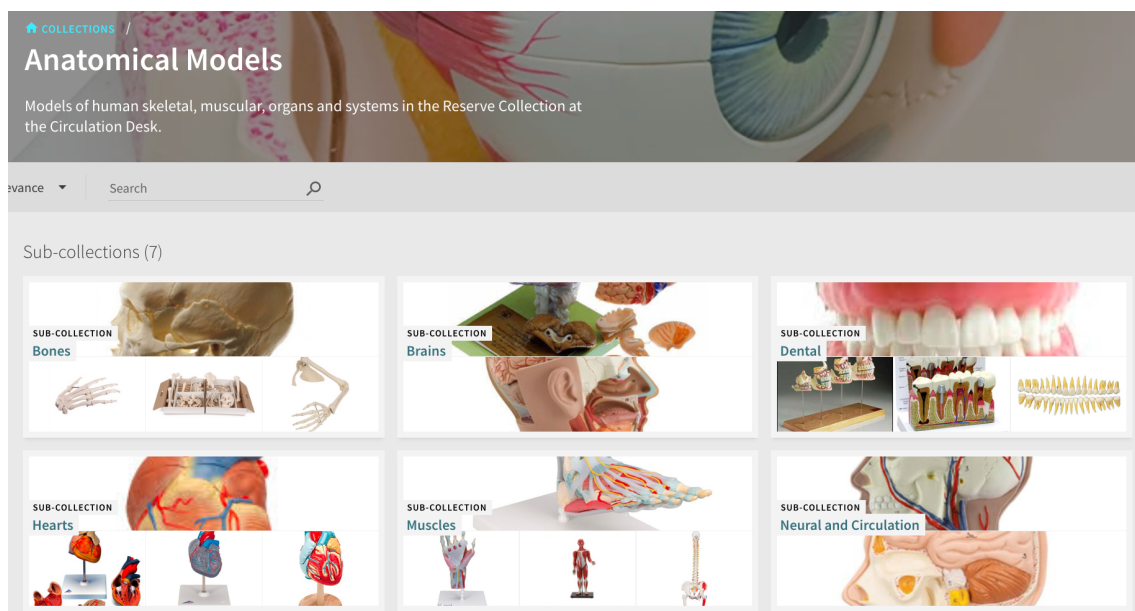
Collection Discovery 🔍

As of December 2020, 12 Omni partner libraries were utilizing Omni's Collection Discovery tool to create highlighted collections. The Collection Discovery feature provides libraries the opportunity to develop virtual library displays composed of Omni records. These virtual displays allow library users to quickly and conveniently access the materials featured in the virtual display, either by following the item's "Access Online" links or by placing a physical item or digitization request directly from the record.

COLLECTION
Indigenous Library Resources (Ontario Tech)

COLLECTION
Black Lives Matter, Civil Rights, & Racism in Canada

COLLECTION
Climate change and the law NGER SOME
AN OFF PROBLEM IT IS HAPPENING HERE. IT IS HAPPENING NOW."
- PRESIDENT OBAMA

COLLECTION
Archives and Special Collections - Rare Books
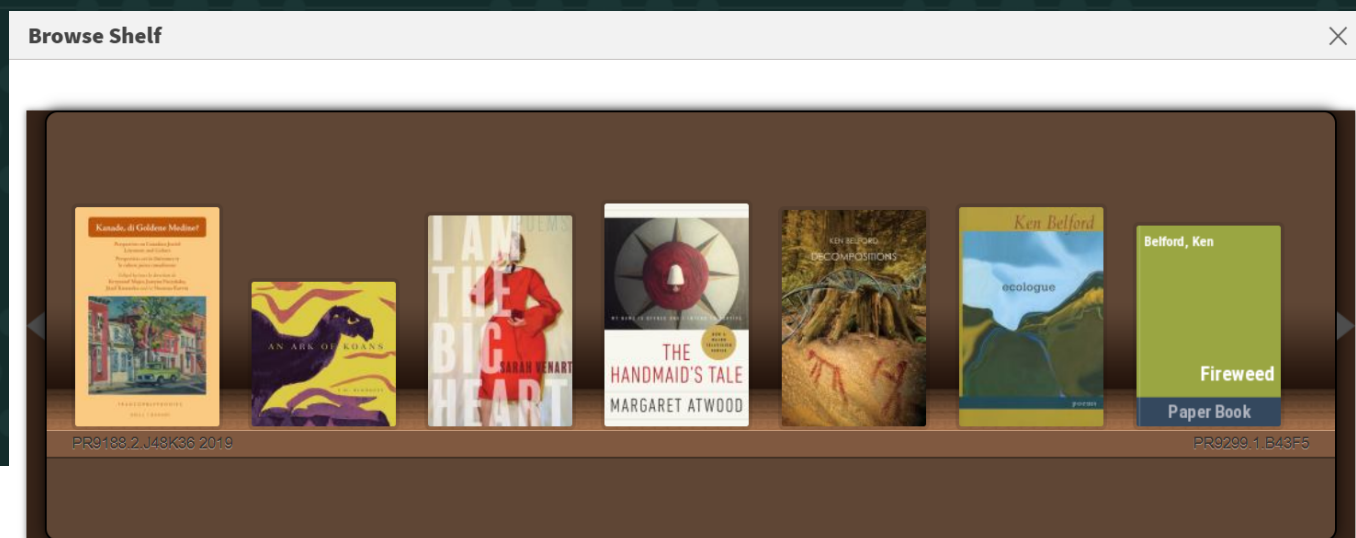
COLLECTION
Pride Display 2020

Using Collection Discovery for Course Reserves

Nipissing University adapted Omni's Collection Discovery feature to provide improved access to their heavily used anatomical models. The highly-visual nature of Collection Discovery allows students to quickly navigate to and select their required models through course reserves. The record associated with each model also provides the students with information about how and where to borrow each item.

🏠 COLLECTIONS /

Anatomical Models
Models of human skeletal, muscular, organs and systems in the Reserve Collection at the Circulation Desk.

evance ▾   Search 🔍

Sub-collections (7)

SUB-COLLECTION
Bones

SUB-COLLECTION
Brains

SUB-COLLECTION
Dental

SUB-COLLECTION
Hearts

SUB-COLLECTION
Muscles

SUB-COLLECTION
Neural and Circulation

12

Subscription Integrations in Omni: Syndetics Unbound & BrowZine

Omni provides users with a comprehensive searching experience, which some libraries have further enhanced with additions such as Syndetics Unbound and Browzine.

As a way to add depth to the user's experience in Omni, Western University subscribed to two added integrations, Syndetics Unbound and BrowZine. Syndetics Unbound provides additional features to an item page, including premium cover images, book recommendations, a book display widget that can be added to LibGuides. Most popular with users is the addition of a browse shelf feature, which gives users the ability to virtually browse the library's shelves, an experience that was otherwise not possible during campus closures resulting from COVID-19.

BrowZine is a tool that gives users the ability to browse and read scholarly content on desktops, laptops, or mobile and tablet device apps. Adding this feature means users can use Omni to access journals in a format that is easy to navigate and gives them the ability to add items to a bookshelf and to receive notifications when new issues of a favourite journal are available.

Overall, adding in the two integrations was a positive experience for Western as they both became popular features for their users.

Workflow Development

The introduction of Omni and Alma provided libraries the opportunity to review and evolve their current workflows and processes that in turn improved the end user's experience with the service. Having these new systems in place was not without its challenges, as is expected when adapting to a new system. However, the process of learning and adopting a new system helped to spark new ideas for user experience and improved processes for library staff, and opportunities to share these with other partners across the province.

At Lakehead University Library, staff were able to transition from providing electronic documents via OCLC Article Exchange to fulfilling requests directly in the system that they are requested. In addition to empowering the user to make a request unassisted and improving workflows, managing digitization requests from Omni has also improved service since staff at each library branch and service point are able to assess the status of all requests. Improving digitization workflows has been important for libraries as they have shifted to remote delivery models in 2020.

In May 2020, the University of Guelph integrated a "Report an Issue" button into Omni within each item record. This integration allowed users to report issues directly to the e-resources team for review from the item record. Since its implementation, this button has been used over 600 times. The report an issue button has allowed University of Guelph to analyze the types of issues that users are encountering and work towards solutions for user experience, such as educating users on how to access the full-text of an article from an Omni record.

The University of Ottawa shared their experience of workflow development with other Omni partners in the CFDUX Mini Conference. These workflows adapted over time as their staff became more familiar with the new integration and better understood how their team would require a different set of knowledge for working with it depending on an individual's role. Initially, their team worked together to come up with a workflow for their e-book collection, and in late 2020 the library team started to regularly meet with a key group of team members, welcoming those outside the group as needed to help with their learning and development of Omni and Alma. This team has since come up with a number of different areas they hope to build out a process for, leading to the big picture plan of how the system will need to be built to best work for their library.

What comes next?

Collaborative Futures was always intended to be more than just the implementation of a shared Library Services Platform. Omni is just the starting point. It is the infrastructure that allows us to collaborate in new ways.

Now we have the infrastructure in place, our collaboration turns to how we can work together, across institutions and within our shared system to provide quality services and resources to our communities. To this end the Network Zone Metadata Management working group is focusing on how to improve the quality of MARC data shared across Omni partners. The Analytics Working Group continues to identify shared reporting requirements and solutions across Omni partners.

In 2021 we are also working towards expanding the Automated Fulfilment Network (AFN) to enable patrons to easily request physical materials from across Omni partners. While patrons from Omni schools already request materials from other Omni schools (and beyond) via the RACER Interlibrary Loan service, the AFN simplifies this process for Omni-partner patrons and Omni-partner staff. The AFN has been operating at University of Guelph, University of Waterloo, and Wilfrid Laurier University since early 2020. Expanding the network to all Omni schools will help achieve one of the key goals of Collaborative Futures, to provide a seamless interface which would make discovery and direct requesting of resources easy for patrons for all OCUL libraries.

Our shared system holds so many opportunities for collaboration, more ways to streamline access to resources, and more chances to reimagine the way libraries deliver services and resources. Now is the time to build our shared expertise and look forward.

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