OUTLOOKONLINE
SEARCH BC PUBLIC & ACADEMIC LIBRARIES

BC ELN has been contracted to support BC public libraries using OutLook OnLine (OLOL) from February 1, 2015 to January 31, 2016. The following report includes Admin Centre support activities to date, an action plan for future activities, and support case analysis.

Milestone	Target Date	Status	% Time Spent
Support for Existing SHAREit Functionality	Feb - Jan 2016	On track.	40%
Communications & Marketing	Feb - Jan 2016	On track.	25%
Managing Impacts of Transition to Canadian Hosting (includes brokering)	Feb - May 2015	On track.	25%
System Optimisations and SHAREit Enhancements	Jun - Jan 2016	On track.	10%

Progress Report Highlights

Support for Existing SHAREit Functionality

- Responded to and managed 65 separate OutLook OnLine support cases from public libraries (out of 80 total), predominantly regarding issues with lender list builds, login/access, and error messages when submitting ILL requests; when applicable, followed up with vendor to help resolve issues.
- Supported libraries that had not yet transitioned to the new SHAREit 4.0 interface through the force redirect that occurred March 15, 2015.
- Updated existing support documents on user accounts, patron-initiated ILL, and ILL requesting from ISO libraries; developed documentation on creating bookmarks and optimising for speed.

Communications & Marketing

- Communicated with libraries about the new OLOL Administrative Centre, the transition to Canadian hosting, and the discontinuation of the old OLOL interface.
- Proposed new organization and update priorities for OLOL support materials on The Commons.

Managing Impacts of Transition to Canadian Hosting

- Developed implementation plan in consultation with vendor and system partners; communicated timeline and implementation plan to all libraries.
- Developed and implemented workarounds to minimise changes to regular ILL staff workflow.
- Brokered public library ILL requests sent through OutLook OnLine to Relais-ISO libraries beginning March 30, 2015. (334 out of 399 requests brokered for public libraries.)

System Optimisations and SHAREit Enhancements

- Participated in bi-weekly Auto-Graphics tech updates and quarterly user group meetings with the vendor and other SHAREit consortia to discuss and stay abreast of possible SHAREit enhancements, including customisable patron forms.

OutLook OnLine Administrative Centre Progress Report

Support for Existing SHAREit Functionality

Progress

- Responded to and managed 65 separate OutLook OnLine support cases from public libraries, predominantly regarding issues with lender list builds, login/access, and error messages when submitting ILL requests; when applicable, followed up with vendor to help resolve issues.
    - Contacted vendor about inability to disable CoverFlow art in the new interface Grid view.
    - Resolved New Westminster's on-going problem of missing lenders by escalating the issue with vendor.
    - Contacted vendor about angle brackets being recognized as malicious code and preventing ILL requests from being submitted; identified as an issue requiring further work in consultation with libraries.
    - Conducted impromptu training sessions with small rural libraries regarding issues like changing passwords and updating OutLook OnLine URLs.
- Resolved ISO messaging issues with requests from VPL to post-secondary ISO partners after thorough investigation and testing, working closely with vendor.
- Negotiated with vendor on date for old interface force redirect; communicated the information to all libraries.
- Supported libraries that had not yet transitioned to the new SHAREit 4.0 interface through the force redirect that occurred March 15, 2015.
- Created wildcard Z-location mappings for Z-targets to help prevent missing lenders on lender lists.
- Updated the OutLook OnLine: Known Bugs & Feature Requests document.
- Updated existing OutLook OnLine support documentation on creating user accounts, patron-initiated ILL, and ILL requesting from ISO libraries.
- Created documentation on how to create bookmarks for OutLook OnLine library-specific URLs in Firefox, Google Chrome, and Internet Explorer.
- Created basic documentation on optimizing the speed at which OutLook OnLine conducts searches.

Communications & Marketing

Progress

- Introduced the OutLook OnLine Administrative Centre and provided update on work being done with OutLook OnLine to libraries and library directors.
- Communicated with libraries about the discontinuation of the old OutLook OnLine interface and how to check that URLs are updated and correct.
- Communicated timeline and implementation plan for transition to Canadian hosting to all libraries and library directors.

- Communicated Relais-ISO workarounds and OutLook OnLine brokering solution to all libraries.
- Compiled a complete list of contact information for all post-secondary and public libraries participating in ILL across the province.
- Proposed new organization of OutLook OnLine support documentation for The Commons.
- Submitted proposal to present on OutLook OnLine at the Beyond Hope conference (June 1-2, 2015).

Managed Impacts of Transition to Canadian Hosting

Progress

- Conducted multiple meetings with vendor and system partners to conduct needs assessment and strategise timeline.
- Reviewed usage statistics to identify best timeline for transition with least impact on libraries.
- Developed workaround to allow public library ILL requests to be sent to Relais-ISO libraries (UBC, SFU, KPU, TRU, UVic) through OutLook OnLine, with no change to regular ILL staff workflow.
- Created procedures and developed tracking system for managing public library ILL requests to Relais-ISO libraries during the transition.
- Tested workaround with each of the 5 post-secondary Relais-ISO libraries to ensure optimum functionality.
- Brokered public library ILL requests sent through OutLook OnLine to Relais-ISO libraries beginning March 30, 2015. (334 requests have been brokered for public libraries, out of a total number of 399 requests.)

Optimisations and New SHAREit Features

Progress

- Reviewed OutLook OnLine's System Wide Lender list to ensure that it is set up to operate for optimal load leveling.
- Working with vendor to develop options for a customizable and simplified ILL request form.
- Attended bi-weekly Auto-Graphics tech update meetings to stay abreast of SHAREit updates.
- Attended 10 sessions of the SHAREit User Group Annual Conference to participate in the discussion and development of SHAREit updates to the benefit of BC libraries.

OutLook OnLine Administrative Centre Action Plan

This action plan outlines up-coming or in-progress activities to January 31, 2016; see the Progress Report (above) for completed activities.

Planned Deliverable	Start Date	Finish Date
Support for Existing SHAREit Functionality		
Refresh lender lists to improve load balancing *[mostly post-sec in coordination with public libraries]*	April 2015	June 2015
Develop & deliver OLOL training modules/sessions	May 2015	On-going
Implement live shelf status where possible	May 2015	On-going
Support implementation of pre-populated OLOL searches	May 2015	On-going
Implement & support Enhanced Request This Item (RTI) *(previously named SSS)*	June 2015	On-going
Identify issues with current union database	June 2015	September 2015
Refresh union database policies and practises	June 2015	October 2015
Communications & Marketing		
Update Commons support materials	Underway	May 2015
Adapt existing support materials for all libraries	Underway	August 2015
Develop centralised OLOL support website	Underway	August 2015
Build, publish and maintain comprehensive ILL contacts list	Underway	On-going
Deliver OLOL training at Beyond Hope conference	June 2015	June 2015
Rebrand union database to differentiate different tools	June 2015	September 2015
Rebrand OLOL service	June 2015	September 2015
Managing Impacts of Transition to Canadian Hosting		
Communicate regularly with libraries on status of transition	Underway	May 2015
Liaise with vendor on facilitating transition	Underway	May 2015
Develop & maintain transition support webpage for libraries	Underway	May 2015
Broker & track ILL requests from libraries to Relais-ISO libraries	Underway	May 2015
Launch Canadian hosted OLOL	May 2015	May 2015
System Optimisations and SHAREit Enhancements		
Facilitate vendor development of customisable patron form	Underway	September 2015
Identify & recommend union database optimisations	Underway	On-going
Explore virtual participation for union database participants *[in consultation with Libraries Branch]*	June 2015	On-going
Implement lending policies functionality as desired	September 2015	On-going
Investigate opportunities for Patron-Initiated ILL	September 2015	On-going
Investigate implementing SIP functionality as desired	November 2015	On-going

Support Case Analysis

The tables below break down the total number of support cases by category and by institution type. In the table on the right, public libraries are further broken down into small (serving populations under 40,000) and large (serving populations over 40,000) libraries. As we receive a high volume of cases from Vancouver Public Library, VPL requests have been pulled out to provide more accurate numbers for the rest of the province. Sample queries from each category are included at the end of the report.
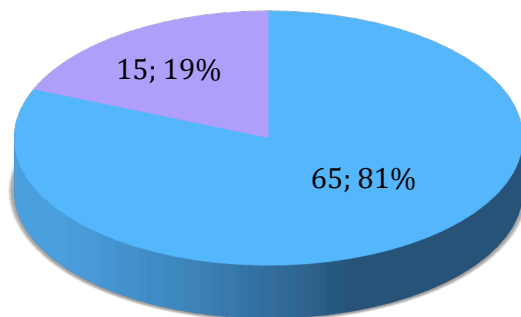
Public vs. Post-Secondary

Category	Post-Secondary	Public
ILL Requesting	3	11
Lender Lists	1	2
Login/Access	1	5
Patron-Initiated ILL		5
Settings	2	7
SHAREit Software Issues		3
Training/Requests for Information	1	6
Transition to Canadian Hosting	1	9
Union Database	3	3
Z-target	3	14
Total Support Cases	**15**	**65**

Breakdown of Public Libraries by Size

Small (< 40,000)	Large (> 40,000)	VPL
2	5	4
	1	1
5		
3	2	
4	3	
	2	1
1	3	2
3		6
		3
	6	8
18	**22**	**25**

By Institution Type

15; 19%
65; 81%

Public Post-secondary
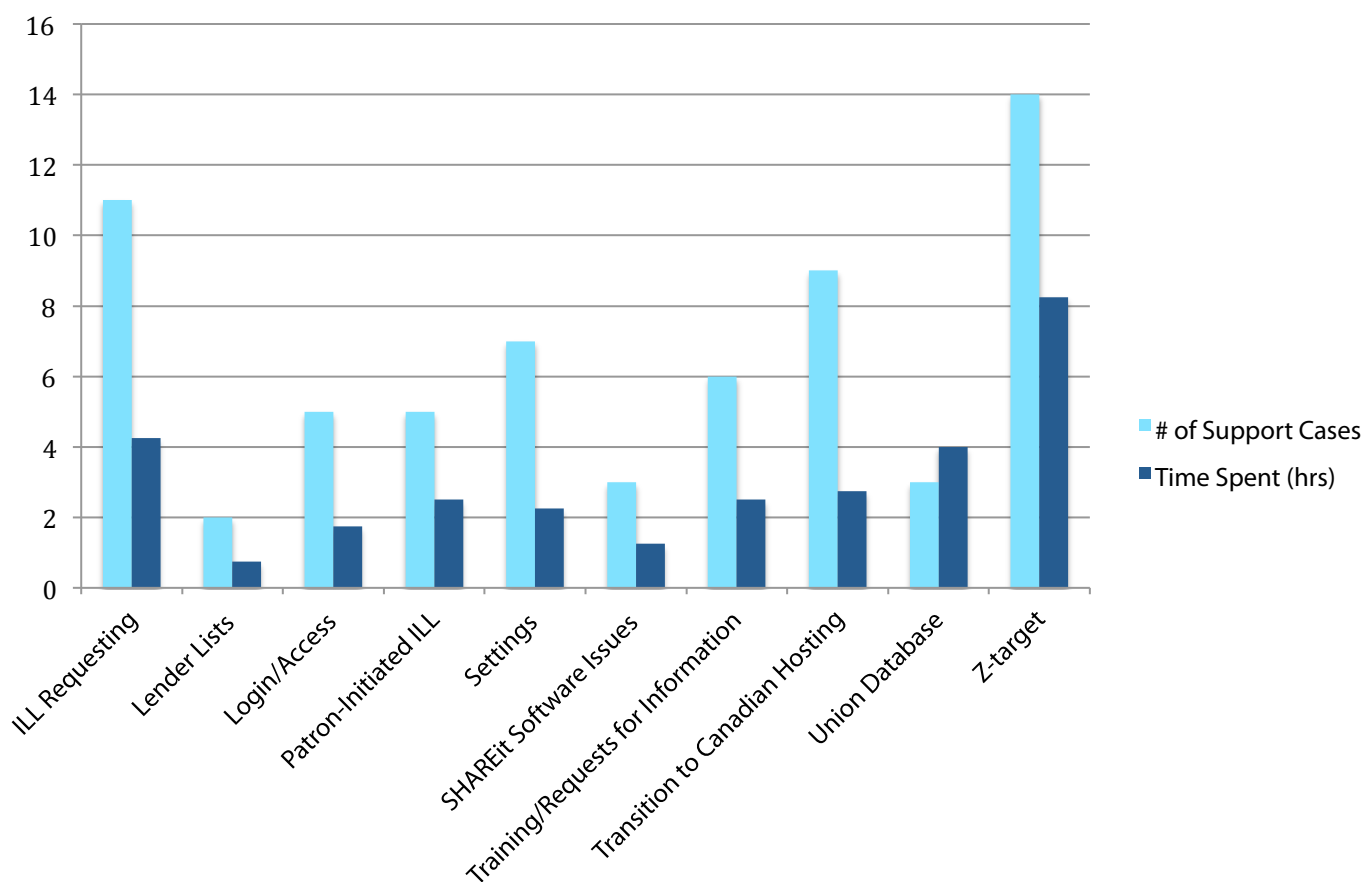
By Public Library Size

18; 28%
22; 34%
25; 38%
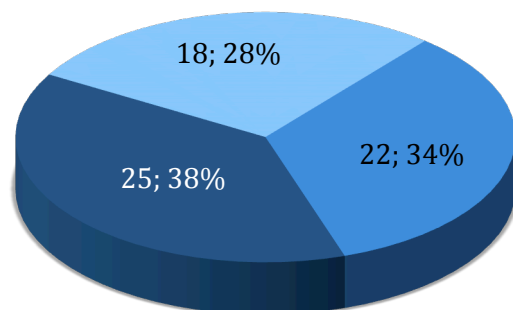
Small Large VPL

Support Case Categories, by Number and Time Spent

The table below breaks down the public library support cases by category and provides information on the total number of cases initiated and the amount of time spent on each category.

Category	# of Support Cases	Time Spent (in hours)	% Resolved to Date
ILL Requesting	11	4.25	90%
Lender Lists	2	0.75	50%
Login/Access	5	1.75	100%
Patron-Initiated ILL	5	2.50	100%
Settings	7	2.25	100%
SHAREit Software Issues	3	1.25	33%
Training/Requests for Information	6	2.50	100%
Transition to Canadian Hosting	9	2.75	100%
Union Database	3	4.00	100%
Z-target	14	8.25	100%

# of Support Cases and Time Spent, by Category

OutLook OnLine Administrative Centre Progress Report for Libraries Branch   February 1 – April 30, 2015

Sample Support Case Queries from Each Category

ILL Requesting

- If Enhanced Request This Item is turned on, does it mean that there will no longer be a need to delete old requests and re-create them when re-approving sends going to Relais libraries?

Lender Lists

- Is there a way for us/a library system to edit a library's lender list ourselves?

Login/Access

- I tried changing my OutLook OnLine password, and now can't get back in to the system. Can you help me reset the password and walk me through the process of changing the password?

Patron-Initiated ILL

- When you log on to ILL tracking, it comes up asking the patron to enter: Name (Last, first). Can this heading be renamed?

Settings

- How can I change the URLs for our library catalogue and homepage in OutLook OnLine?

SHAREit Software Issues

- Why am I receiving duplicate ILL requests in OLOL, for items that should have already been approved and sent to possible lenders?

Training/Requests for Information

- Do you provide training sessions for library staff? Or is there training documentation available online or in print that could be shared with us?
- How does the system identify material types (with respect to the Lending Policy settings)?

Transition to Canadian Hosting

- How do you plan on forwarding ILL requests to the 5 Relais libraries? Will it be done manually?
- Is UBC not supplying "Shipped" messages? Does this mean I have to submit exception stats for the Relais libraries to be submitted to the Province?

Union Database

- A library keeps asking for a particular title, but our holding is attached to a different record. Why is this happening? And why is our library not showing up for the correct item?

Z-target

- We are having problems with both InterLINK and non-InterLINK libraries not showing up on lender lists. Why is this happening, and how can it be fixed?