

The following report includes OutLook OnLine Administrative Support Centre activities from January 1 to June 30, 2017, an action plan for future activities, and support case analysis.

### ***Support for Existing SHAREit Functionality***

#### **Progress**

- Responded to and managed **215 support cases** from public and post-secondary libraries predominately regarding issues with Patron-Initiated Interlibrary Loan (PI-ILL) set-up, ILL Request problems including ISO communication issues, Live Shelf Status checks, and Union Database records.
- Opened **13 Auto-Graphics (A-G) Helpdesk tickets** reporting a variety of issues related to Live Shelf Status, ISO ILL Communications, user interface enhancements or errors, and Script/server Errors, with approximately 69% of reported issues Fixed/Resolved, and 31% of Defects/New Feature requests in Development pending a resolution.
- Configured, set-up and managed **Z39.50 Search Targets**:
  - Updated configuration of sites when issues were reported with live shelf status, usually due to internal library changes to their Locations or Statuses.
- Activated, set-up and maintained **Live Shelf Status**:
  - Continuing to work with A-G to improve holdings retrieval so live shelf status errors are negligible for current and newly configured libraries.
- Coordinated with sites such as BCIT, RRU & UFV that use alternate software (e.g. Relais), on implementation as ISO targets in OLOL. Implementation of ISO targets is ongoing.
- Facilitated communications with A-G and Relais on resolution of an ongoing serious issue with ISO ILL communications and lost Shipped messages between the two products.
- Identified training areas to target within the upcoming series of online training resources. Investigated e-training software including Adobe Captivate and Blackboard Collaborate.

### ***Communications & Marketing***

#### **Progress**

- Participated in 2017 A-G Enhancement voting process; BC's top enhancement choice of Desktop Delivery approved for development in 2017.
- Assisted the **InterLINK PI-ILL Working Group** with their *InterLINK Interlibrary Loan Policy Survey 2017* including review of their 2014 survey, creation of their 2017 survey, discussion with Working Group members, follow-up to achieve a 94% response rate and final analysis of results.
- Developed and executed a **survey of all participating library staff** to assess **Partner Library Training Requirements** from the OLOL Admin Centre.
  - Responses showed that sites would like a variety of different training options including live online training and video screencast guides. Requested topics include basic workflow functions, statistics and UX admin customization.

- Communicated with interested libraries about the **new option to activate OpenURL Search links** for each individual site.
- Maintained the OLOL Admin Centre **support website** with new and updated communications including creating or updating 6 guides, 18 FAQs, quarterly reports and multiple News notices of software/server updates and downtime. Promoted the website in almost all subsequent communications via email and telephone.
- Attended A-G User Group Quarterly meeting as **Chair of User Group**; coordinated communications through transition to new Product Managers.

## Optimisations and New SHAREit Features

### Progress

- Coordinating and implementing **Patron-Initiated ILL (PI-ILL)**:
  - Assisted North Island College (Main Campus), Surrey Public Libraries, and Port Moody Public Library with implementing privacy compliant PI-ILLs through in-person training sessions and/or email/telephone, including.
  - Coordinated A-G custom development work for a rapid fix to display Aboriginal characters in key areas of software necessitated by the addition of VPL's new branch to Outlook OnLine. This is a requirement of VPL implementing PI-ILLs.
  - Assisted in-progress sites Burnaby Public Library and Vancouver Public Library with PI-ILL implementation.
- **Updated documentation** on Statistics, UX Admin (User Interface & Branding), Configuring Search Targets (\*new\* BCUC requested Blocked Lenders feature), OpenURL Search linking, and more as new features and fixes became available from Auto-Graphics.
- Updated Outlook OnLine OpenURL Search links guide to include newly implemented EBSCO Discovery Service & Database linking templates coordinated with EBSCO; assisted sites with implementation of OpenURL Search linking to enable seamless patron-initiated ILLs from EBSCO interfaces to Outlook OnLine.
- Collaborated with A-G to design our enhancement request for a Blocked Lenders list; feature implemented by A-G in March 2017.
- Collaborated with A-G to develop use cases for BC's **consortial enhancement requests** including BC's #1 enhancement choice **Desktop Delivery** of articles.
- Collaborated with A-G and EBSCO to design our enhancement request for **OpenILL** of article request data to OLOL blank request forms.
- Followed up with the commitment from A-G to implement our proposed solution to **live shelf status mis-match issues** with RDA/LCSH catalogued record inconsistencies and live shelf status checks outlined in our Use Support.
- Communicated with outside-BC ISO sites, such as the University of Alberta, to request additional information on set-up as an ISO site to allow for BCUC requests direct to non-BC institutions. Reception to testing Outlook OnLine communications with non-BC sites has been positive.

## OutLook OnLine Administrative Centre Action Plan

This action plan outlines up-coming or in-progress activities; see the Progress Report (above) for completed activities. Previous Progress Reports are available on the OLOL website: [ill.bceln.ca](http://ill.bceln.ca).

Planned Deliverable	Status
<b>Support for Existing SHAREit Functionality</b>	
Implement live shelf status where possible	On-going
Coordinate set-up of ISO ILL with new BC Relais libraries	On-going
Coordinate with vendor to develop and implement fix of RDA/LoC mismatch issues	In development
<b>Communications &amp; Marketing</b>	
Create & execute a series of library staff surveys to assess satisfaction with support, training needs, etc..	On-going
Develop & deliver online OLOL training modules/sessions	On-going
Develop & deliver in-person training where requested	On-going
Develop & deliver regular OLOL communiqués including a Newsletter	On-going
Rebrand union database to differentiate tools	Summer 2018
Rebrand OLOL service	Spring 2018
Support Yukon Public Libraries joining OLOL	On-going
<b>Communications &amp; Marketing</b>	
Identify & recommend union database optimisations	On-going
Support libraries implementing Patron-initiated ILL	On-going
Investigate implementing NCIP functionality as desired	On-going
Support implementation of pre-populated OLOL searches including from database vendors such as EBSCO & ProQuest	On-going
Facilitate vendor development of enhanced statistics tools	On-going
Investigate out-of-province searching/requesting	On-going
Support implementation of Blocked Lender List enhancement	Complete
Support implementation of OpenURL ILL requesting direct from database vendors (eg. EBSCO) to pre-filled OLOL forms	On-going
Support implementation of Enhanced Desktop Delivery	On-going

## Support Case Analysis

### Support Cases, by Category and Institution Type

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.

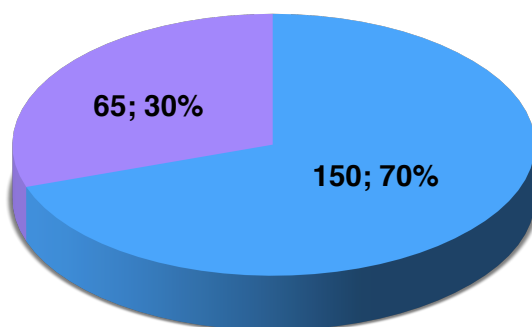
**Public vs. Post-Secondary**

Category	Post-Secondary	Public
ERTI Request Issues	1	3
Holiday / Closures		1
ILL Requests	7	17
ISO	26	7
Lender List Issues & Policies		1
Live Shelf Status	1	17
Login / Access		13
Other	6	15
Other Bugs / Errors		10
Patron-Initiated ILL	12	27
Settings & Configuration	3	11
SHAREit Software Issues & Enhancement Requests		4
Statistics	1	5
Training		
Union Database	2	16
Z-Target Set-Up & Issues	6	3
<b>Total Support Cases</b>	<b>65</b>	<b>150</b>

**Public Library by Size**

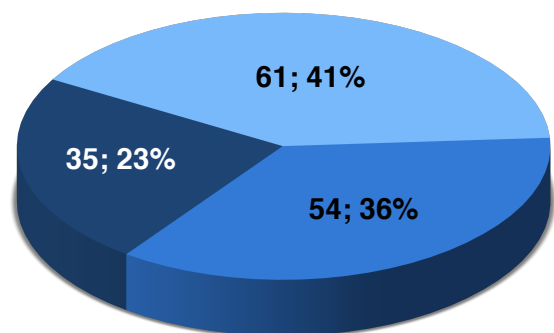
Small (< 40,000)	Large (> 40,000)	VPL
1	2	
1		
9	5	3
2		5
1		
13	1	3
8	4	1
4	10	1
4	5	1
1	14	12
8	3	
1		3
	4	1
8	4	4
	2	1
<b>61</b>	<b>54</b>	<b>35</b>

**By Institution Type**



■ Public ■ Post-secondary

**By Public Library Size**



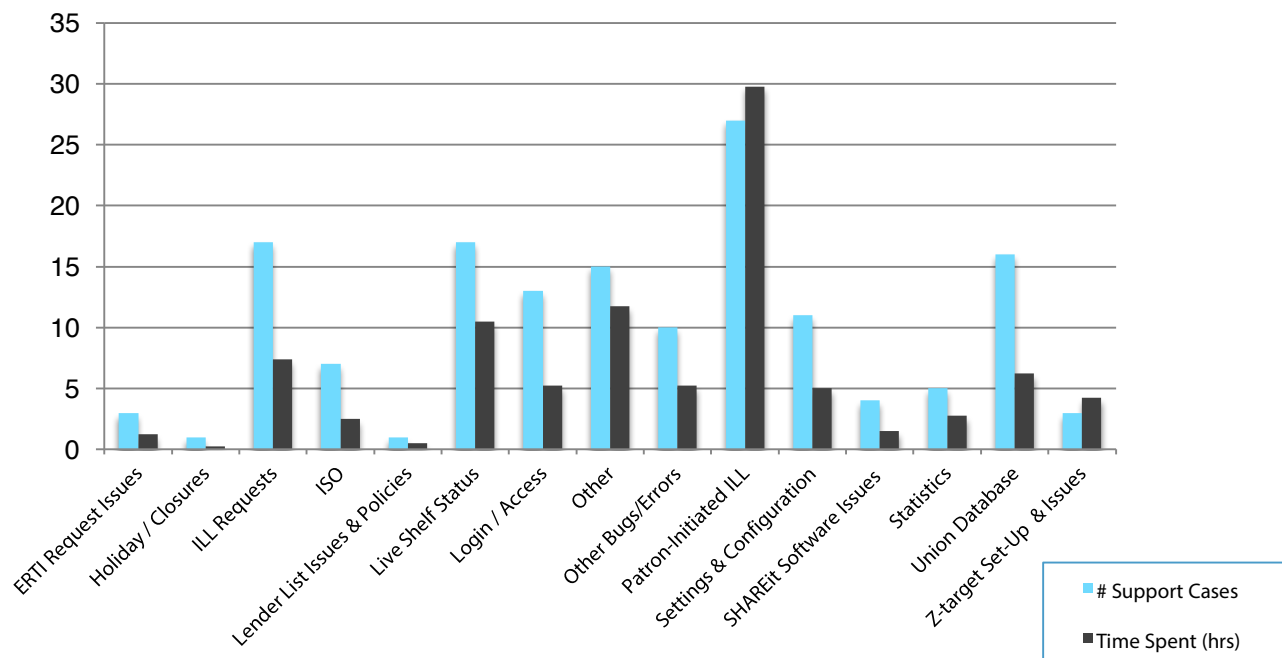
■ Small ■ Large ■ VPL

## 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
ERTI Request Issues	3	1.25	100%
Holiday / Closures	1	0.25	100%
ILL Requests	17	7.4	100%
ISO	7	2.5	100%
Lender List Issues & Policies	1	0.5	100%
Live Shelf Status	17	10.5	71%
Login / Access	13	5.25	100%
*Other	15	11.75	100%
Other Bugs/Errors	10	5.25	100%
Patron-Initiated ILL	27	29.75	100%
Settings & Configuration	11	5	100%
SHAREit Software Issues & Enhancement Requests	4	1.5	50%
Statistics	5	2.75	100%
Union Database	16	6.25	87.5%
Z-Target Set-Up & Issues	3	4.25	100%

**# of Support Cases and Time Spent, by Category**



## Sample Support Case Queries from Each Category

### ERTI Request Issues

Is my record for *Harry Potters and the Deathly Hallows* being merged with other lender records in the ERTI lender list build?

### Holidays / Closures

Why aren't I receiving any new requests now that I'm back from holidays?

### ILL Requests

Why did my "Lender > Will supply/In process" request expire while I was trying to fill it to be Shipped to the Borrower library?

### ISO

Why didn't this ISO Relais site receive the request I sent them?

### Lender Lists Issues & Policies

Can I update my Blocked Lenders list to include a charging library?

### Live Shelf Status

Why is the live shelf status check failing for this library on new Movie records with a 024 field but not a 020 ISBN?

### Login/Access

Our ILL Staff member just retired – can we continue to use the same OutLook OnLine account she was using?

### Other

Can we use the photocopies of return mail slips received from other libraries as postage?

### Other Bugs / Errors

Why does my browser auto-fill previous patron information into the form when I try to help different patrons submit their ILL requests?

### Patron-Initiated ILL

Why can't the Branch Picklist display special characters such as Aboriginal characters?

### Settings & Configuration

How are due dates configured/calculated within OutLook OnLine for public libraries versus post-secondary?

### SHAREit Software Issues & Enhancement Requests

Why are foreign language items being ranked higher in my results than English language materials?

### Statistics

How do I see my statistics on which requests were created by patrons and which by staff?

### Union Database

Why do these records show as the wrong Computer File format when they're actually Books?

### Z-target Set-Up & Issues

Our library recently renovated and moved the items around – can we update our Z39.50 set-up with the new locations for live shelf checks?