The following report includes OutLook OnLine Administrative Centre support activities from May 1 to August 31, 2016, and action plan for future activities, and support case analysis.

Progress Report Highlights

Support for Existing SHAREit Functionality

- Responded to and managed 173 support cases from public and post-secondary libraries predominantly regarding issues with the SHAREit software interface upgrade/issues, Patron-Initiated Interlibrary Loan set-up and Loan/Copy form configuration.
- Opened 10 Auto-Graphics Helpdesk questions reporting a variety of bugs/issues related to the new mobile interface, with an approximately 80% resolution rate from Auto-Graphics including 60% of reported bugs Fixed, and 20% In Development or Pending a Fix.
- Configured, set-up and managed Live Shelf Status:
  - Completed configuration/set-up and activation of 3 additional new public library sites with Live Shelf Status availability checks (via Z39.50).
  - Continued to coordinate with BC Libraries Co-op (BCLC) to activate the Sitka Z39.50 server so live shelf status can be implemented at all SITKA sites. BCLC identified and resolved a search issue that was resulting in slow retrieval of results.

Communications & Marketing

- Released the OutLook OnLine 2015 Actions & Achievements <http://bceln.ca/sites/default/files/reports/OLOL_Actions_Achievements_2015.pdf>.
- Consulted with Libraries Branch about a request from Yukon Public Libraries to join OutLook.
- Gathered feedback from libraries on a possible Canada Post postal strike and recommended strategies during any job action. In consultation with Libraries Branch, compiled and distributed recommended processes and solutions that public and post-secondary libraries could implement in the event of job action.

System Optimisations and SHAREit Enhancements

- Developed and issued documentation on simplified customisable Patron Loan & Copy forms, Privacy Disclaimer notices, Patron Email notices, and the steps on setting up privacy-compliant Patron-Initiated Interlibrary Loans.
- Coordinated and implemented Patron-Initiated ILL (PI-ILL):
  - Provided a variety of updated documentation to assist libraries in implementing PI-ILLs including guides and templates for customising their Staff and Patron forms.
  - Assisted multiple test site libraries, such as Salt Spring Island and Coquitlam Public Library, to implement privacy compliant PI-ILLs using the now available guides. Updated the documentation/guides with new features, bug fixes and feedback as it became available.

OutLook OnLine Administrative Centre Progress Report

Progress

- Responded to and managed 173 support cases from public and post-secondary libraries, predominantly regarding issues with the SHAREit software interface upgrade/issues, Patron-Initiated Interlibrary Loan set-up and Loan/Copy form configuration, Z39.50 set-up & mapping, live shelf status, settings & configuration (such as Themes), ILL request issues, and other issues or bugs; when applicable, followed up with A-G to help resolve issues.
- Configured, set-up and managed Z39.50 Targets*:*
    - Completed configuration/set-up and activation of 3 additional new public sites with Live Shelf Status availability checks (via Z39.50).
    - Coordinated with the vendor to develop and implement a bug fix for the ILL requests, created from Z39.50 records, which included missing or blank Title details.
    - Continued to coordinate with BC Co-op to activate the Sitka Z39.50 server so live shelf status can be implemented at all SITKA sites. BCLC identified and resolved a search issue that was resulting in slow retrieval of results.
    - Identified additional issues related to activating only desired Sitka site codes. Coordinating with BCLC further to develop a solution for activation of individual sites as desired rather than all (approximately 50 libraries) sites at once.
- 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.
    - Investigated the differences between ownership and live shelf status checks in OutLook OnLine that results in different errors in both ERTI builds versus live shelf checks.
    - Investigated with A-G erroneous live shelf check rejections and resolved many vendor Holdings retrieval issues with some libraries in order to facilitate successful live shelf status activation for all currently configured sites.
- Coordination and liaison on ISO issues*:*
    - Liaisoned between libraries and the vendor to resolve issues with ISO communications that were resulting in some ILL request update failures between Relais and OutLook OnLine.
    - Coordinated with A-G and ISO libraries to improve ISO-SHAREit communications including identifying new defects that are now in development to be fixed by A-G.
- Worked with BCLC and A-G on deciding where OutLook OnLine activity logs should be stored.
- Continued to work closely with the vendor to identify why some public and post-secondary libraries are being skipped as lenders during the ERTI lender list build. Acquiring the ERTI lender build and live shelf status ownership check algorithms from Auto-Graphics which allowed us to identify the current issues to submit a future enhancement request to improve both algorithms.

Communications & Marketing

Progress

- Released the OutLook OnLine 2015 Actions & Achievements <http://bceln.ca/sites/default/files/reports/OLOL_Actions_Achievements_2015.pdf>.
- Contacted a variety of Public and Post-Secondary libraries to gather feedback on a possible Canada Post postal strike and recommended strategies during any job action.
- In consultation with Libraries Branch, compiled and distributed recommended processes and solutions that public and post-secondary libraries could implement in the event of Canada Post job action.
- Met with BC ELN Executive Director and InterLINK Executive Director to discuss providing an update on OutLook OnLine Patron-Initiated ILL and Live Shelf Status to the InterLINK AAG group.
- Managed BCLC invoice for Canadian hosting.
- Compiled and issued OutLook OnLine statistics for 2015 and January - June 2016.
- Maintained the OLOL Administrative Support Centre website <http://ill.bceln.ca> with new and updated communications including 6 guides, 19 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.

Optimisations and New SHAREit Features

Progress

- Provided a variety of updated documentation to assist libraries in implementing PI-ILLs including guides and templates for customising their Staff and Patron forms.
- Assisted multiple test site libraries, such as Salt Spring Island and Coquitlam Public Library, to implement privacy compliant PI-ILLs. Updated the documentation/guides with new features, bug fixes and feedback as it became available.
- Worked with vendor on BC-proposed solution to live shelf status mis-match issues with RDA/LCSH catalogued record inconsistencies and live shelf status checks. This issue currently affects multiple sites including the Vancouver Public Library.
- Chaired user group meeting with Auto-Graphics and other SHAREit consortia to discuss and stay abreast of updates and fixes to the software.
- Opened 10 Auto-Graphics Helpdesk questions reporting a variety of bugs/issues related to the new interface including "Request This Item" button bugs, ERTI Lender Code issues, Union Database issues, Live Shelf Status check errors, an "ILL Tracking Requests" login bug and more. Achieved an approximately 80% resolution rate from Auto-Graphics including 60% of reported bugs Fixed, 20% In Development or Pending a Fix and 20% In Progress investigation.

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.

Planned Deliverable	Start Date	Finish Date
Support for Existing SHAREit Functionality		
Refresh lender lists to improve load balancing [for post-secondary and InterLINK libraries]	**COMPLETE**	
Identify holdings retrieval issues & resolve with vendor	September 2015	Pending vendor enhancement
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
Communications & Marketing		
Develop centralised OLOL support website	**COMPLETE**	
Build, publish comprehensive ILL contacts list	Underway	On-going
Rebrand union database to differentiate tools	June 2015	Delayed
Rebrand OLOL service	June 2015	Delayed
Managing Impacts of Transition to Canadian Hosting - COMPLETE		
System Optimisations and SHAREit Enhancements		
Identify & recommend union database optimisations	Underway	On-going
Facilitate vendor development of customisable patron form	**COMPLETE**	
Develop documentation on the new customisable forms	**COMPLETE**	
Support libraries implementing new customisable forms	Underway	On-going
Explore virtual participation for union database participants [in consultation with Libraries Branch]	June 2015	On-going
Develop new documentation on Patron-initiated ILLs	**COMPLETE**	
Implement lending policies functionality as desired	September 2015	On-going
Investigate opportunities for Patron-Initiated ILL	September 2015	On-going
Support libraries implementing Patron-initiated ILL	June 2016	On-going
Investigate implementing SIP/NCIP functionality as desired	November 2015	On-going
Facilitate vendor development of enhanced statistics tools	Vendor timeline	Expected 2016

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.
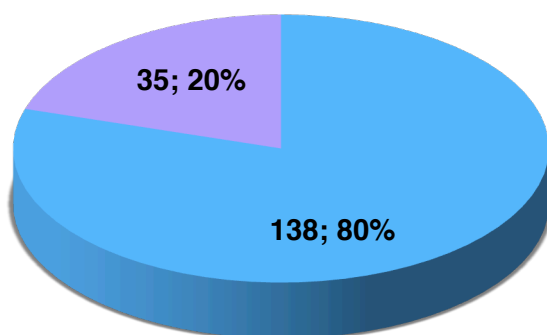
Public vs. Post-Secondary

Category	Post-Secondary	Public
ERTI Request Issues	2	1
Holiday / Closures		5
ILL Requests	1	15
ISO	4	
Lender List Issues & Policies	1	6
Live Shelf Status		17
Login / Access	1	2
Other	5	7
Other Bugs / Errors	2	6
Patron-Initiated ILL	4	17
Settings & Configuration	10	8
SHAREit Software Issues & Enhancement Requests	4	31
Statistics		4
Training		2
Union Database		8
Z-Target Set-Up & Issues	1	9
Total Support Cases	**35**	**138**

Public Library by Size

Small (< 40,000)	Large (> 40,000)	VPL
		1
3	2	
3	8	4
3	1	2
5	11	1
2		
3	1	3
4	2	
5	11	1
2	6	
7	13	11
4		
	1	1
2	4	2
	8	1
43	**68**	**27**

By Institution Type

35; 20%
138; 80%

■Public ■Post-secondary

By Public Library Size

43; 31%
27; 20%
68; 49%
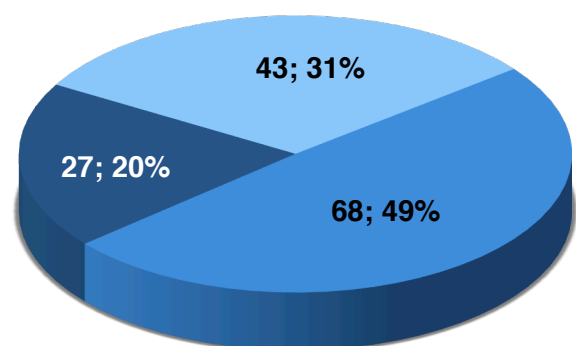
■Small ■Large ■VPL

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	1	0.5	100%
Holiday / Closures	5	1.75	100%
ILL Requests	15	6.75	100%
Lender List Issues & Policies	6	3.25	100%
Live Shelf Status	17	10.75	100%
Login / Access	2	0.5	100%
Other	7	2.25	86%
Other Bugs / Errors	6	2.25	83%
Patron-Initiated ILL	17	11.5	100%
Settings & Configuration	8	3.25	100%
SHAREit Software Issues & Enhancement Requests	31	12.25	94%
Statistics	4	2.25	100%
Training	2	5	100%
Union Database	8	2.75	100%
Z-Target Set-Up & Issues	9	8.25	100%

# of Support Cases and Time Spent, by Category
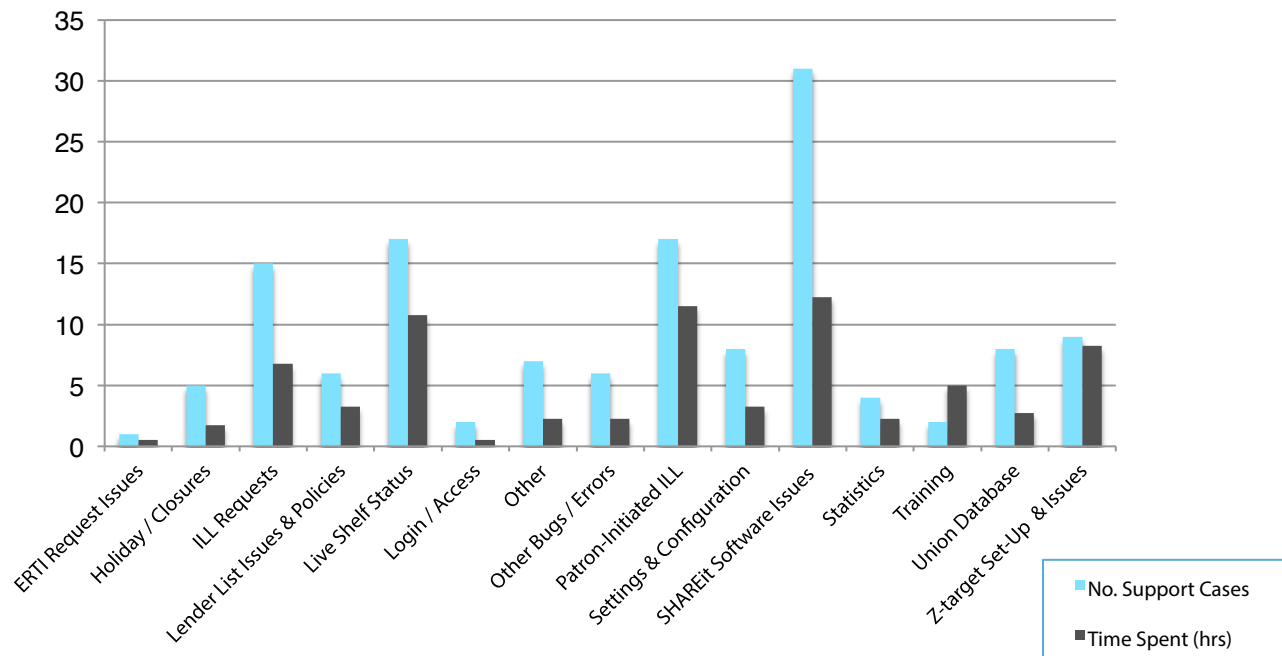
Sample Support Case Queries from Each Category

ERTI Request Issues

If I manually add lender codes into the Lender List that weren't added by the ERTI smart-build will the request be routed to those libraries?

Holidays / Closures

Why are libraries still setting their Days to Respond (DTR) to zero (0) when they go on holidays?

ILL Requests

Why is my Blank Request with non-english characters not creating a request in my Awaiting Approval?

Lender Lists Issues & Policies

I received my book from two different libraries! Why did my request move on to the next code in the Lender List even though an ISO-Relais library was going to ship us the book?

Live Shelf Status

My request is being rejected by live shelf status even though it's available. Can you force this request to go to the lender library so they can fill it?

Login/Access

I can't see the Multi-Copy request function. Do I need to login as Staff to use it?

Other

What should we do in the event of a Canada Post postal strike?

Other Bugs / Errors

Why is my font size so big on the new interface? Can I change it on my browser?

Patron-Initiated ILL

Where should I put my ILL Restrictions now that I'm using the Privacy Disclaimer notice?

Settings & Configuration

Can I change my Theme and highlight rows in my Request Manager to make it easier to read?

SHAREit Software Issues & Enhancement Requests

Can we use the Barcode Processing & Shipping Label functions? I don't see them available.

Statistics

Why is the Download report button/link not working correctly on my statistics report?

Training

Can you train me to set-up and administer Patron-Initiated Interlibrary Loans and the new customisable forms?

Union Database

Why is this record in the Union Database incorrect and can you fix it?

Z-target Set-Up & Issues

We have Live Shelf Status activated but recently changed our Firewall. Why are we now receiving requests in our Pending for items that are unavailable?