The following report includes OutLook OnLine Administrative Centre support activities from September 1 to December 31, 2015, 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.	50%
Communications & Marketing	Feb - Jan 2016	On track.	25%
System Optimisations and SHAREit Enhancements	Jun - Jan 2016	On track.	25%

Progress Report Highlights

Support for Existing SHAREit Functionality

- Responded to and managed 170 separate OutLook OnLine support cases from public and post-secondary libraries, predominantly regarding issues with Z39.50 set-up & mapping, live shelf status, enhanced requesting & lender lists, holidays/closures and bugs/error messages; when applicable, followed up with Auto-Graphics (the vendor) to help resolve issues.
- Worked closely with libraries and the vendor to resolve and/or escalate issues reported by libraries around live shelf status and Z39.50 connections in order to pursue Patron-Initiated InterLibrary Loans.
- Achieved a 44% increase over 2014 in the number of sites uploading records to the union databases. In order to optimize union database functionality, best practices and updated documentation were developed and issued on conducting frequent full strip and reloads.

Communications & Marketing

- Launched a new OutLook OnLine Administrative Support Centre website including 25 guides, news feed and 61 FAQs. Promoted the website in all subsequent communications via email.
- Maintained weekly website updates of new guides, FAQs and news.
- Communicated with libraries both individually and via listservs about many topics including the ERTI algorithm, live shelf status, software updates, resolutions for technical errors/bugs, setting holidays, statistics, and ILL charges and how to avoid fees.

System Optimisations and SHAREit Enhancements

- Participated in tech updates and user group meetings with Auto-Graphics and other SHAREit consortia to discuss and stay abreast of updates and fixes to the software.
- Analysed and voted on possible SHAREit enhancements as part of vendor enhancement selection process, prioritising customisable patron forms and statistics improvements as per discussions of system partners Libraries Branch and BC ELN.

OutLook OnLine Administrative Centre Progress Report

Support for Existing SHAREit Functionality

Progress

- Responded to and managed 170 separate OutLook OnLine support cases from public and post-secondary libraries, predominantly regarding issues with Z39.50 set-up & mapping, live shelf status, enhanced requesting & lender lists, holidays/closures and bugs/error messages; when applicable, followed up with Auto-Graphics to help resolve issues.
- Achieved a 44% increase over 2014 in the number of sites uploading records to the union databases. In order to optimize union database functionality, best practices and updated documentation were developed and issued on conducting frequent full strip and reloads.
- Investigated why some public library records are being loaded into the BC ELN Serials & Media union databases.
- Worked closely with the vendor to identify why some public and post-secondary libraries are being skipped as lenders or rejected during live shelf status checks. Live shelf status was deactivated for some sites as solutions are explored. Implemented temporary workarounds where available while the vendor develops fixes or long-term solutions.
- Served as a liaison between libraries and the vendor to resolve issues with holdings display that affected multiple libraries.
- Worked closely with libraries and Auto-Graphics to resolve and/or escalate issues reported by libraries around live shelf status and Z39.50 connections. Identified issues with set-up of Z39.50 set-up in library ILSs, which require ILS vendor cooperation. Also identified issues with live shelf status wildcards in the SHAREit, which has been escalated to vendor development.

Communications & Marketing

Progress

- Negotiated and managed BC Libraries Co-op invoice for 2015/16 Canadian server hosting.
- Initiated 2016/17 license negotiations with Auto-Graphics.
- Migrated all support documentation to a new OutLook OnLine website and updated guides where applicable.
- Launched a new OutLook OnLine Administrative Support Centre website including guides, updates and many FAQs. Promoted the website in all subsequent communications via email and telephone.
- Maintained weekly website updates of new guides, FAQs and news.
- Developed and issued regular communications with libraries both individually and via listservs about many topics including the ERTI algorithm, live shelf status, software updates, resolutions for technical errors/bugs, setting holidays, statistics, and ILL charges.
- Developed and issued documentation on holiday closures, updating union database records, resolving errors related to ISO communications, and resolving bugs related to the implementation of the new customizable patron forms.

Optimisations and New SHAREit Features

Progress

- Worked with libraries and the vendor to set-up additional libraries as Z-targets as part of working towards Patron-Initiated Requesting.
- Created internal system for tracking the status of Z39.50 connections and holdings information of libraries being set-up as new Z-targets.
- Identified and notified vendor of SHAREit issues with location mapping. Communicated with libraries to provide vendor with examples and additional information about the problems.
- Discovered issues with SHAREit's default live shelf status settings and contacted vendor about identifying the problems and developing solutions.
- Consulted with Auto-Graphics on development and (delayed) deployment of customisable patron forms for ILL requesting in mid-December.
- Explored and communicated a work-around/fix for some patron form bugs that caused display of certain fields to disappear, while also requesting an overall fix from the vendor.
- Participated in tech updates and user group meetings with Auto-Graphics and other SHAREit consortia to discuss and stay abreast of updates and fixes to the software.
- Analysed and voted on possible SHAREit enhancements as part of vendor enhancement selection process, prioritising customisable patron forms and statistics improvements as per discussions with system partners BC ELN and Libraries Branch.

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 *[for post-secondary and InterLINK libraries]*	**COMPLETE**	
Identify holdings retrieval issues & resolve with vendor	September 2015	On-going
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		
Update Commons support materials	**COMPLETE**	
Adapt existing support materials for all libraries	**COMPLETE**	
Develop centralised OLOL support website	**COMPLETE**	
Build, publish comprehensive ILL contacts list	Underway	On-going
Rebrand union database to differentiate different tools	June 2015	Delayed
Rebrand OLOL service	June 2015	Delayed
Managing Impacts of Transition to Canadian Hosting - COMPLETE		
System Optimisations and SHAREit Enhancements		
Facilitate vendor development of customisable patron form	**COMPLETE**	
Identify & recommend union database optimisations	Underway	On-going
Develop documentation on the new customizable forms	January 2016	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	January 2016	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/NCIP functionality as desired	November 2015	On-going
Facilitate vendor development of enhanced statistics tools	Vendor timeline	2016

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.
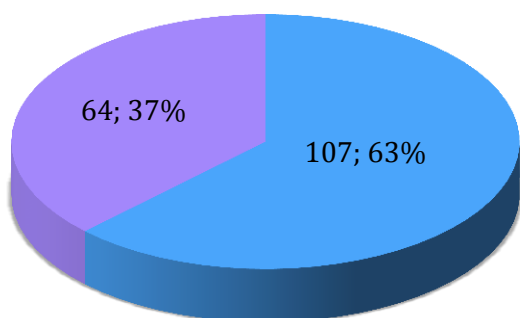
Public vs. Post-Secondary

Category	Post-Secondary	Public
ERTI Request Issues	6	7
Holiday / Closures	1	8
ILL Requests	11	11
ISO	4	3
Lender List Issues & Policies	3	6
Live Shelf Status	5	13
Login / Access	2	2
Other		2
Other Bugs / Errors	1	12
Patron-Initiated ILL	2	4
Settings & Configuration	10	7
SHAREit Software Issues & Enhancement Requests		11
Statistics		2
Training / Requests	1	
Union Database	7	3
Z-Target Set-Up & Issues	11	16
Total Support Cases	**64**	**107**

Public Library by Size

Small (< 40,000)	Large (> 40,000)	VPL
1	6	
6	2	
3	5	3
		3
	5	1
1	12	
1	1	
0	1	1
7	1	4
	4	
3	2	2
1	9	1
1	1	
3		
3	12	1
30	**61**	**16**

By Institution Type

- 64; 37% (Post-Secondary)
- 107; 63% (Public)

■ Public

By Public Library Size

- 30; 28% (Small)
- 16; 15% (VPL)
- 61; 57% (Large)

■ Small ■ Large ■ VPL

OutLook OnLine Administrative Centre Progress Report   *September 1 – December 31, 2015*
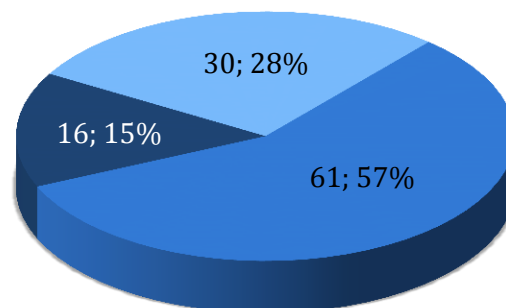
## Support Case Categories, by Number and Time Spent

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	7	5.25	71%
Holiday / Closures	8	2.75	100%
ILL Requests	11	1.75	100%
ISO	3	4	100%
Lender List Issues & Policies	6	3.25	100%
Live Shelf Status	13	10	85%
Login / Access	2	.75	100%
Other	2	.5	100%
Other Bugs / Errors	12	4.75	67%
Patron-Initiated ILL	4	3.5	100%
Settings & Configuration	7	6	100%
SHAREit Software Issues & Enhancement Requests	11	5.5	91%
Statistics	2	1.25	100%
Union Database	3	.75	100%
Z-Target Set-Up & Issues	16	13	69%

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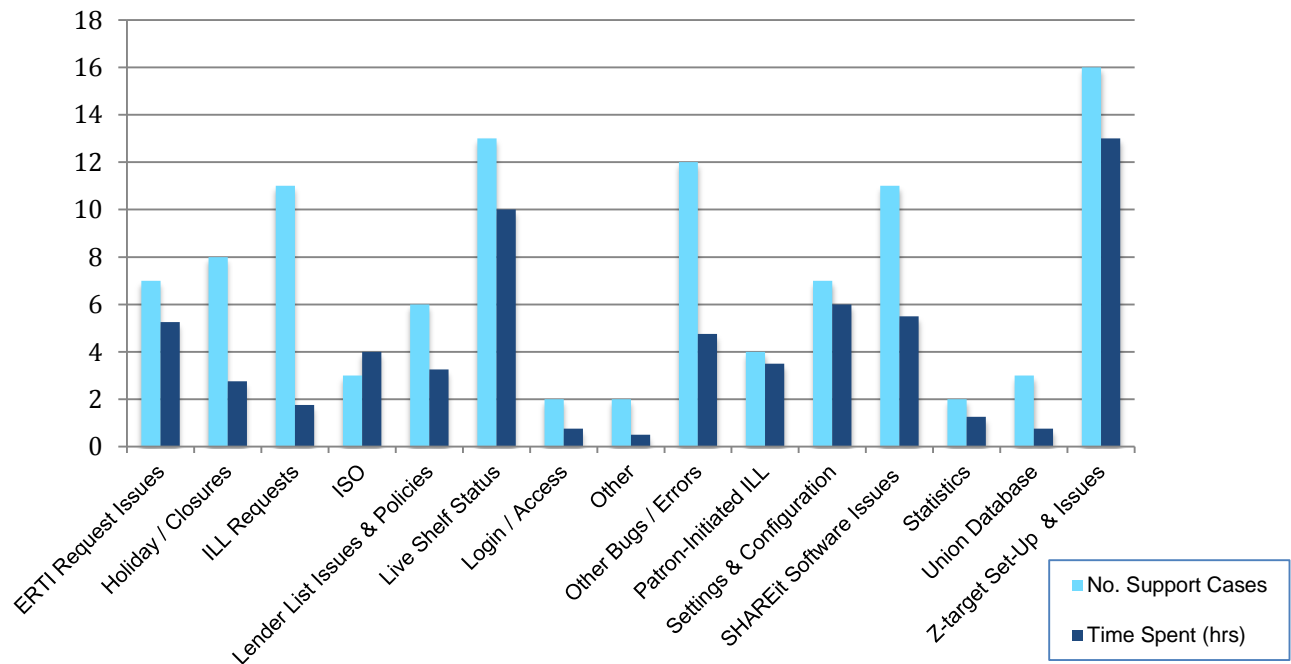
Sample Support Case Queries from Each Category

ERTI Request Issues

Can the charging libraries (SFU, UBC & UVic) not be automatically added as lenders when ERTI builds the Lender List?

Holidays / Closures

Why am I returning from Holidays to find requests waiting when I set-up the close dates in my Holiday List?

ILL Requests

I accidentally submitted my request as a Non-returnable (Copy) but it was actually a Returnable (Loan) book which I need shipped back. What do I do with it now? Can the type of request be changed after I've already marked it as Shipped?

ISO

When I submit a request to this ISO partner library the request didn't update and it displayed the error message "Invalid State Transition. ISO CurrentState: NotSupplied".

Lender Lists Issues & Policies

How do I manually edit the Lender List to remove or add lenders I don't want? My requests always go straight to Pending!

Live Shelf Status

Why was the request I submitted rejected with the message "Skipped try again later".

Login/Access

Why can't I access my OutLook OnLine with my current URL? It doesn't seem to take me to the correct Library!

Other

How do I sign-up for the InterLINK listserv??

Other Bugs / Errors

Why am I not receiving emails from OutLook OnLine when requests come in or are updated? I have my email set-up correctly in my Participant Record.

Patron-Initiated ILL

Can I activate Patron-Initiated ILLs and customise the forms my Patrons will use?

Settings & Configuration

Help! Why is my Username and Password displaying to everyone on the Login page?

SHAREit Software Issues & Enhancement Requests

Why has my Branch Pick-List disappeared from all my forms after the software update yesterday?

Statistics

Can ILL statistics be generated for each of my branches? Each branch submits their requests under a separate username.

Union Database

Why aren't all the records I submitted being loaded into OutLook OnLine?

Z-target Set-Up & Issues

Why are my Keyword, Title and Author searches in OutLook not returning results from our Z39.50 server?