

The following report includes OutLook OnLine (OLOL) Administrative Support Centre activities from July 1 to December 31, 2017, an action plan for future activities, and support case analysis.

Support for Existing SHAREit Software Functionality

Progress

- Responded to and managed **217 support cases** from public and post-secondary libraries predominately regarding issues with Patron-Initiated Interlibrary Loan (PI-ILL) set-up, SHAREit software issues & enhancement requests and Z39.50 Target Set-up/Issues.
 - A SHAREit software update including a tablesort feature affecting the Request Manager resulted in a larger than usual number of bug reports and enhancement requests.
- Opened **14 Auto-Graphics (A-G) Helpdesk tickets** reporting a variety of issues related to Live Shelf Status, Statistics, Server errors/issues and various Software issues & enhancement requests. Approximately 64% of our tickets were resolved with the remaining 36% generating ongoing Defect or Enhancement tickets that are currently assigned to Development.
- Configured, set-up and managed **Z39.50 Search Targets** including 2 new sites: **New Westminster Public Library (NWPL)** and **Vancouver Island Regional Library (VIRL)**.
- Activated, set-up and maintained **Live Shelf Status** for multiple sites including activation of NWPL and VIRL:
 - Continued to work with A-G to improve holdings retrieval so live shelf status errors are negligible for current and newly configured libraries.
 - Continued to work with the BC Libraries Co-op to resolve issues with SHAREit frequently unable to connect to the SITKA Z39.50 server for live shelf checks.

Communications, Training & Marketing

Progress

- Participated in the **2018 A-G Enhancement voting process** on 'languishing' issues only, as A-G is primarily focused on developing an entirely new re-coded Version 6 of SHAREit in 2018.
- Using e-training software Adobe Captivate, **created and published online training resources** including video demonstrations and e-learning tutorials for a variety of topics such as Holiday Closures, Document Delivery, Blocked Lenders and LSS Mis-Match issues/errors.
- Developed and executed a survey of all post-secondary sites to assess interest in the **OpenILL Enhancement** and ascertain if enough sites were interested in participating to cover A-G quoted costs. Not enough interest was expressed in this functionality to move forward at this time.
- Developed and executed a survey of all participating libraries to gather feedback and data on **OLOL Union Databases** for future decision-making.
- Maintained the **OLOL Admin Centre support website** with new and updated communications including creating or updating 11 guides, 23 FAQs, 5 e-training videos/tutorials, semi-annual reports and multiple News notices of software/server updates and downtime: <http://ill.bceln.ca/>

- Planned, facilitated and attended the **2017 A-G SHAREit User Group Virtual Conference** September 12 - 21, 2017 to learn about current and upcoming features and enhancements.
- Facilitated **Patron-Initiated Interlibrary Loans - Group Discussion**, September 20, 2017 at the A-G SHAREit User Virtual Conference; session was positively received and highly attended.
- Delivered the inaugural **OLOL Admin Support Centre Newsletter**:
<http://campaign.r20.constantcontact.com/render?m=1112987960335&ca=35bcc60b-3477-459f-9e3c-03813ec9fba9>.
- Attended June 13, 2017 A-G User Group Quarterly meeting as **Chair of User Group**.

Optimisations and New SHAREit Features

Progress

- Coordinated and implemented **Patron-Initiated ILL (PI-ILL)**:
 - Assisted Vancouver Public Library (VPL) and NWPL to implement privacy compliant PI-ILLs through in-person training sessions and/or email/telephone support.
 - Assisted in-progress sites such as the VURL with PI-ILL implementation.
 - Coordinated with Public Libraries Branch, InterLINK Public Libraries and various individual post-secondary sites, such as the Yukon College and Northern Lights College, to improve privacy compliance for PI-ILLs.
- **Updated documentation** on PI-ILLs, Downloading of Union Database Records, Multi-Login add-ons, OLOL Embeddable Search Widget, Statistics, UX Admin (User Interface & Branding), OpenURL Search linking, and more as new features and fixes became available from A-G.
- Collaborated with A-G to develop BC's enhancement request for **Desktop Delivery** of articles; tested the implementation in December 2017. Further enhancement needed before recommending OLOL sites launch to patrons.
- Collaborated with A-G and EBSCO to design an enhancement request for **OpenILL** of article request data to OLOL blank request forms.
 - Requested and received quote from A-G to implement OpenILL enhancement.
 - Followed-up with A-G to postpone this request until Version 6 API functionality is available which may allow implementation at much reduced cost or no cost.
- Followed up with the commitment from A-G to implement a BC proposed solution to **live shelf status mis-match issues** with RDA/LCSH catalogued record inconsistencies and live shelf status checks.
- Followed up with the commitment from A-G to implement desired enhancement to **live shelf status wildcards** to allow for setting up Z-targets, such as the University of British Columbia, with live shelf status.

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	Status
Support for Existing SHAREit Functionality	
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
Coordinate with vendor to develop and implement a Z39.50 Wildcard mapping fix for Live Shelf Checks	In development
Communications & Marketing	
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 and webinar 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
Communications & Marketing	
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	Delayed until Version 6
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	Complete
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. VPL experienced a higher than usual number of questions due to a complex set-up of Patron-Initiated interlibrary loan requesting configuration for their large site.

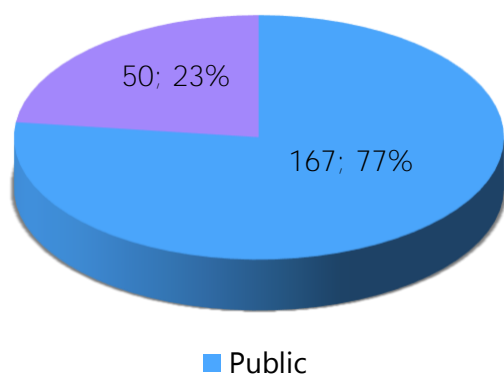
Public vs. Post-Secondary

Category	Post-Secondary	Public
ERTI Request Issues		1
Holiday / Closures		6
ILL Requests	1	16
ISO	5	3
Lender List Issues & Policies		2
Live Shelf Status		9
Login / Access	2	5
Other	5	9
Other Bugs / Errors	2	5
Patron-Initiated ILL	14	41
Settings & Configuration	9	13
SHAREit Software Issues & Enhancement Requests	6	27
Statistics		7
Training		2
Union Database	6	7
Z-Target Set-Up & Issues		14
Total Support Cases	50	167

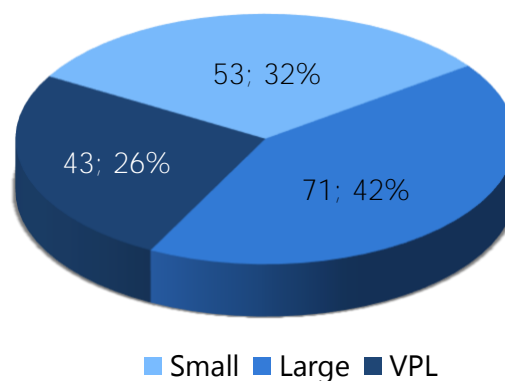
Public Library by Size

Small (< 40,000)	Large (> 40,000)	VPL
		1
3	2	1
9	5	2
2		1
	2	
6	3	
3	1	1
5	3	1
	4	1
1	13	27
7	3	3
8	14	5
4	3	
1	1	
3	4	
1	13	
53	71	43

By Institution Type



By Public Library Size



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	1	.5	100%
Holiday / Closures	6	3	100%
ILL Requests	16	7.5	100%
ISO	3	1.25	100%
Lender List Issues & Policies	2	.75	100%
Live Shelf Status	9	6.5	88%
Login / Access	5	2	100%
*Other	9	6	100%
Other Bugs/Errors	5	2	100%
Patron-Initiated ILL	41	31.25	100%
Settings & Configuration	13	7	100%
SHAREit Software Issues & Enhancement Requests	27	18.75	93%
Statistics	7	5.5	100%
Training/Requests	2	4.5	100%
Union Database	7	3.5	86%
Z-Target Set-Up & Issues	14	14	100%

of Support Cases and Time Spent, by Category

