

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

Progress Report Highlights

Support for Existing SHAREit Functionality

- Responded to and managed **182 support cases** from public and post-secondary libraries predominately regarding issues with Patron-Initiated Interlibrary Loan (PI-ILL) set-up, Live Shelf Status checks, Z39.50 Set-up, ILL Request problems, and Union Database records.
- Opened **11 Auto-Graphics Helpdesk tickets** reporting a variety of issues related to Live Shelf Status, Scoping/Location Configuration, ISO ILL Communications, and Script Errors, with approximately 73% of reported bugs/issues Fixed, and 27% in Development/Pending a Fix.
- Completed configuration/set-up and **activation of Live Shelf Status** availability checks (via SITKA Z39.50) at Pemberton Public Library, Squamish Public Library, and Whistler Public Library.
- Tested and supported implementation of a **new upload process** for updating the Union Databases with a web-based ShareFile system that replaces FTP/SFTP. Developed communications, FAQs and documentation to ensure a smooth transition to the new system.
- Coordinated with the vendor to develop a major bug fix for ILL requests, created from electronic journal records, which included the wrong Request Type.

Communications & Marketing

- Released the OutLook OnLine **Admin Centre Progress Report** for May 1 - August 31, 2016 available here: <<http://ill.bceln.ca/reports>>
- Developed and executed a **survey of all participating library staff** to assess satisfaction with OLOL Admin Centre support, and gather suggestions and feedback on current activities and future priorities.
- Communicated with interested Sitka libraries about the **new option to activate live shelf status** for each individual site.
- Presented to the **InterLINK PI-ILL Working Group** and discussed current options for PI-ILLs, Live Shelf Status, and Lender Policy implementation.

System Optimisations and SHAREit Enhancements

- Coordinating and implementing **Patron-Initiated ILL**:
 - Communicated about the newly updated features and fixes to PI-ILLs.
 - Assisted 5 sites with implementing privacy compliant PI-ILLs through in-person training sessions or email/telephone, including Richmond Public Library, West Vancouver Memorial Library, and North Island College.
 - Assisted 10 sites with achieving privacy compliance of their current PI-ILLs including Bowen Public Library, Fort St. John Public Library, Gibsons Public Library, and Whistler Public Library.

OutLook OnLine Administrative Centre Progress Report

Support for Existing SHAREit Functionality

Progress

- Responded to and managed **182 support cases** from public and post-secondary libraries predominately regarding issues with Patron-Initiated Interlibrary Loan set-up, Live Shelf Status checks, Z39.50 Set-up, ILL Request problems, and Union Database records.
- Opened **11 Auto-Graphics Helpdesk tickets** reporting a variety of issues related to Live Shelf Status, Scoping/Location Configuration, ISO Communications, and Script Errors, with approximately 73% of reported bugs/issues Fixed, and 27% in Development/Pending a Fix.
- Configured, set-up and managed **Z39.50 Search Targets**:
 - Completed configuration/set-up and activation of 3 additional new public sites with Live Shelf Status availability checks (via SITKA Z39.50) including Pemberton Public Library, Squamish Public Library, and Whistler Public Library.
 - 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.
 - Completed trouble-shooting with BC Co-op to implement live shelf status checks for Sitka libraries. Applied a developed solution for activation of individual sites as desired.
 - All three new Sitka sites (Pemberton Public Library, Squamish Public Library, and Whistler Public Library) were successfully activated without affecting any other SITKA sites or their ILL processes.
- Tested and supported implementation of a **new upload process** for updating the Union Databases with a new web-based ShareFile system that replaces FTP/SFTP. Developed communications, FAQs and documentation to ensure a smooth transition to the new system.
- Coordinated with the vendor to develop a **bug fix for ILL requests**, created from electronic journal records, which included the wrong Request Type.
- Coordinated communications between libraries, Auto-Graphics and Relais to open an **investigation into ISO communications** that were resulting in some Relais Shipped messages not being recognized by OutLook OnLine.
- 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**. Admin Centre championing of this investigation has prompted Auto-Graphics to implement a change to their matching algorithms to improve both ERTI smart-builds and live shelf checks.

Communications & Marketing

Progress

- Released the OutLook OnLine **Admin Centre Progress Report** for May 1 - August 31, 2016 available here: <<http://ill.bceln.ca/reports>>

- Presented to the **InterLINK PI-ILL Working Group** and discussed current options for PI-ILLs, Live Shelf Status, and Lender Policy implementation.
- Developed and executed a **survey of all participating library staff** to assess satisfaction with OLOL Admin Centre support, and gather suggestions and feedback on current activities and future priorities.
 - Responses showed that the current satisfaction level is high and sites would like additional focus on training and online tutorials going forward.
- Communicated with interested Sitka libraries about the **new option to activate live shelf status** for each individual site.
- Maintained the OLOL Admin Centre **support website** with new and updated communications including 6 guides, 13 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.
- Updated our **ILL Staff and Administrator Training guides** to provide in-person, online or telephone training for new ILL Staff and Admins as well as refresh training for any library sites.
- **Chaired quarterly SHAREit user group meetings** to discuss current and upcoming enhancements, and facilitate A-G enhancement list voting process.

Optimisations and New SHAREit Features

Progress

- Coordinating and implementing **Patron-Initiated ILL (PI-ILL)**:
 - Communicated again the newly updated features and fixes to PI-ILLs, including in coordination with BC Public Libraries Branch and InterLINK.
 - Assisted 5 sites with implementing privacy compliant PI-ILLs through in-person training sessions or email/telephone, including Richmond Public Library, West Vancouver Memorial Library, and North Island College.
 - Assisted 5 additional sites in progress or interested in implementing privacy compliant PI-ILLs including, Burnaby Public Library, Port Moody Public Library, Vancouver Public Library and, Surrey Public Libraries.
 - Assisted 10 sites with achieving privacy compliance of their current PI-ILLs including Bowen, Fort St. John, Gibsons, and Whistler Public Libraries.
- **Updated documentation** on simplified customisable Patron Loan & Copy forms, Privacy Disclaimer notices, Patron Email notices, and the steps on setting up privacy-compliant PI-ILL as new features and fixes became available from Auto-Graphics.
- Submitted and championed **enhancement requests** for new features or fixes desired by BCUC sites including a Use Case for Desktop Delivery of articles and OpenURL of article request data to OLOL blank request forms.
- Received a commitment from A-G to implement our proposed solution to **live shelf status mismatch issues** with RDA/LCSH catalogued record inconsistencies and live shelf status checks outlined in our Use Support.
- Participated in **user group meetings** with Auto-Graphics and other SHAREit consortia to discuss and stay abreast of updates, enhancements, and fixes to the software.
- Coordinated issues with the newly implemented **Shipping Labels and Bookstraps** feature to request fixes and enhancements from Auto-Graphics.

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		
Implement live shelf status where possible	May 2015	On-going
Support implementation of pre-populated OLOL searches	May 2015	On-going
Coordinate set-up of ISO ILL with new BC Relais libraries	Jan 2017	
Coordinate with vendor to develop and implement fix of RDA/LoC mismatch issues	Jan 2016	
Develop & deliver online OLOL training modules/sessions	Spr/Sum 2017	On-going
Develop & deliver in-person training in conjunction with Beyond Hope and BC Library conferences	Spr/Sum 2017	
Communications & Marketing		
Create & execute a series of library staff surveys to assess satisfaction with support, training needs, etc..	October 2016	On-going
Develop & deliver regular OLOL communiques	Spr/Sum 2017	
Rebrand union database to differentiate tools	Spr/Sum 2017	
Rebrand OLOL service	Spr/Sum 2017	
Support Yukon Public Libraries joining OLOL	Jan 2017	
System Optimisations and SHAREit Enhancements		
Identify & recommend union database optimisations	Underway	On-going
Support libraries implementing Patron-initiated ILL	June 2016	On-going
Investigate implementing NCIP functionality as desired	Spr/Sum 2017	On-going
Facilitate vendor development of enhanced statistics tools	November 2016	On-going
Investigate out-of-province searching/requesting	Spr/Sum 2017	
Support implementation of Blocked Lender List enhancement	Vendor timeline	
Support implementation of Enhanced Desktop Delivery	Vendor timeline	

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.

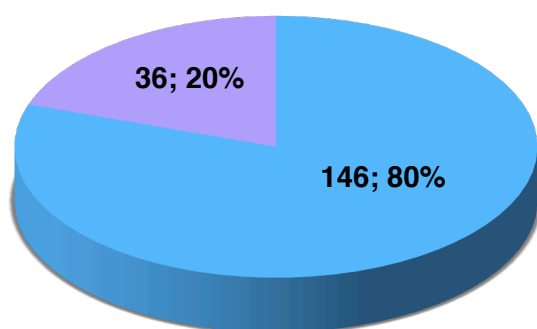
Public vs. Post-Secondary

Category	Post-Secondary	Public
ERTI Request Issues		2
Holiday / Closures	1	1
ILL Requests		12
ISO	7	1
Lender List Issues & Policies		1
Live Shelf Status		14
Login / Access	1	3
Other	2	2
Other Bugs / Errors	1	
Patron-Initiated ILL	15	53
Settings & Configuration	2	9
SHAREit Software Issues & Enhancement Requests	3	9
Statistics		1
Training		2
Union Database	1	10
Z-Target Set-Up & Issues	3	26
Total Support Cases	36	146

Public Library by Size

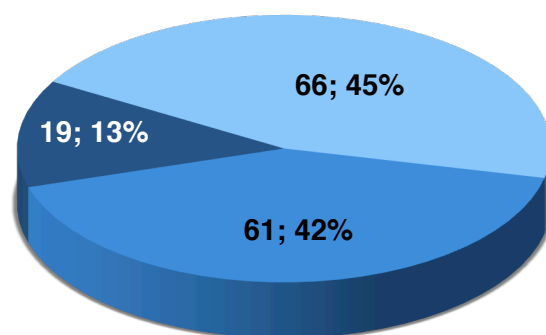
Small (< 40,000)	Large (> 40,000)	VPL
	1	1
1		
6	5	1
		1
1		
6	5	3
2	1	
		2
22	28	3
3	3	3
2	4	3
1		
	2	
4	5	1
18	7	1
66	61	19

By Institution Type



■ Public ■ Post-secondary

By Public Library Size



■ Small ■ Large ■ VPL

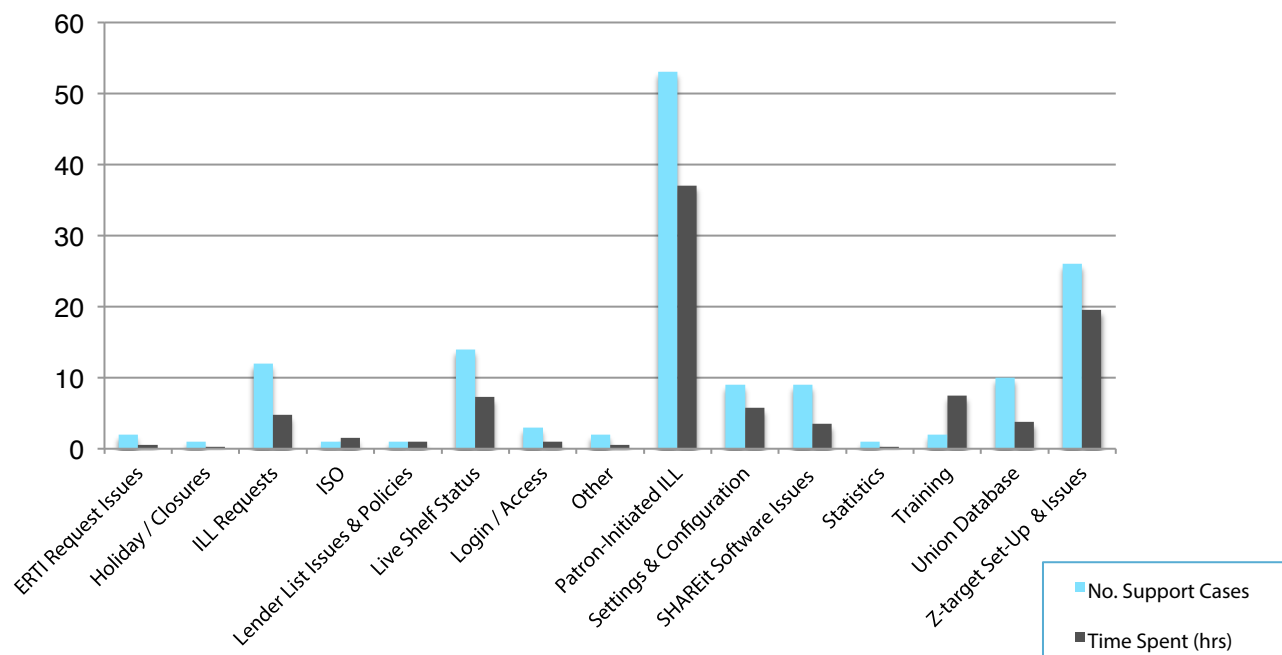
Support Case Categories, by Number and Time Spent

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.

**Please note that the 0% resolved in the ISO category relates to an ISO communication problem that Auto-Graphics and Relais are currently coordinating a fix for, so the issue is ongoing but not yet resolved as of January 2017.*

Category	# of Support Cases	Time Spent (in hours)	% Resolved to Date
ERTI Request Issues	2	.5	100%
Holiday / Closures	1	.25	100%
ILL Requests	12	4.75	100%
ISO	1	1.5	0%*
Lender List Issues & Policies	1	1	100%
Live Shelf Status	14	7.25	93%
Login / Access	3	1	100%
Other	2	.5	50%
Patron-Initiated ILL	53	37	98%
Settings & Configuration	9	5.75	89%
SHAREit Software Issues & Enhancement Requests	9	3.5	89%
Statistics	1	.25	100%
Training	2	7.5	100%
Union Database	10	3.75	90%
Z-Target Set-Up & Issues	26	19.5	100%

of Support Cases and Time Spent, by Category



Sample Support Case Queries from Each Category

ERTI Request Issues

How does the ERTI smart-build create the lender list from my activated Search Targets?

Holidays / Closures

Other island sites normally broker patron-initiated requests within our OLOL. While we've activated Holiday Dates in our Maintain Participant Record during our renovations can the other ILL staff still receive and process PI-ILLs?

ILL Requests

What is the best way to submit requests for Multi-Copies such as Book Clubs and where do I find the option?

ISO

Why are ISO Shipped messages from Relais libraries not always updating in Outlook OnLine?

Lender Lists Issues & Policies

Why are my requests for Audiobooks being rejected even though the library says they loan them? Is the system automatically rejecting them or is the library manually rejecting?

Live Shelf Status

Why am I receiving requests for items that are Checked Out and our SITKA live shelf status should have rejected?

Login/Access

How do I create new user logins?

Other

Can other libraries no longer use removable sticky labels on our books as we've found it damages them?

Patron-Initiated ILL

What do I need to make my PI-ILLs privacy compliant?

Settings & Configuration

How do I de-activate the social media icons (eg. Twitter) under my book jackets in the Outlook OnLine Full Details page?

SHAREit Software Issues & Enhancement Requests

Why does the Request Type default to 'Returnable (loan)' rather than Non-returnable (copy)' when I submit requests for articles from electronic journal records?

Statistics

I'm new and would like to know how to access our statistics. Can you suggest a guide?

Training

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

Union Database

Can you provide the password to the new ShareFile upload for union database records?

Z-target Set-Up & Issues

We're a SITKA library - can you set-up live shelf status for us?