

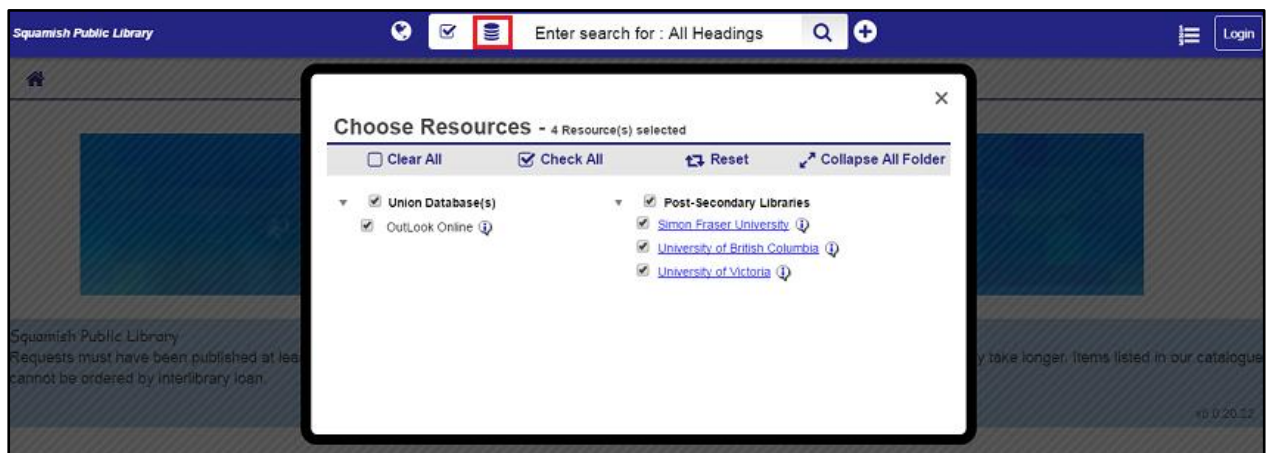
Configuring Search Targets Display in Outlook OnLine

When searching **Outlook OnLine** a user can select the **Search Resources (formerly called Targets)** they wish to search, for example the Outlook OnLine union database, and/or university libraries virtual Z39.50 targets.

Default search targets can be activated and configured by **Outlook OnLine Admin accounts** under **Staff Dashboard > Pac Admin > Search Resources**. Please contact the [Outlook OnLine Administrative Centre](#) if you have any questions or would like some assistance configuring your search resources/targets.

Default search targets will appear to your guests/patrons and staff when they click on the **“Select Search Resource(s)”** ‘stacked coins’ icon next to the search box. Search resources can be grouped under different customizable headings, eg. Post-Secondary Libraries. They can also be configured to be displayed or selected (checked-off) by default differently for guests/patrons and logged in Staff. For example, you may wish to only allow your patrons to search the “Outlook OnLine” union database but display many additional search resources to Staff.

Staff can also configure their individual accounts to hide or change the search defaults. Check-out our **FAQ** here <<http://ill.bceln.ca/faq-my-favorite-resources>> for more information on configuring individual Staff accounts.



Important Notes when Configuring the Search Resource/Target Display:

There are a few things to take note of before you change your library’s search target display:

- **Union Databases:** Public libraries are recommended to only activate the **Outlook OnLine union database** for their patrons. They **may wish to enable** the **ELN Media** or **ELN Serials** UDBs for Staff but please be aware these catalogues only search for Post-secondary media and serials. Public library media & serials are located within the Outlook OnLine union database instead.
- **Z39.50 Resources/Targets:** Although there is a long list of potential targets that you can enable, we recommend only activating the following:
 - Your Own Library Search Target if desired (eg. Squamish Public Library)
 - Simon Fraser University
 - University of Northern British Columbia
 - University of British Columbia
 - University of Victoria

- It's important to note that it's currently not possible to shadow or hide locations with Z39.50 searching. Activating your own library target can be useful to your patrons for up-to-date reminders of what's available – but they will also be able to see items/records that are normally hidden in your own catalogue.
- SFU, UBC, and UVic [charge public libraries for interlibrary loan requests](#) unless you have additional consortial agreements in place (eg. InterLINK with UBC and SFU).
- Now that the ERTI smart-build algorithm has been activated, any Search Resources/Targets you have activated for Staff will be used to create your lender list builds *even if they aren't checked-off by default*. The search results display and ERTI smart-build are two separate features in the software and both use active search targets differently. This means if you have the University of Victoria target available as a Search Resource their library code will also automatically be added to your lender list builds even if you don't display them during your search! Use the **Blocked Lenders** list option below to stop this from happening.
- **New!** The **Blocked Lenders** list is now available within your **Staff Dashboard > ILL Admin > Maintain Participant Record > Blocked Lenders** to stop the ERTI smart-build from automatically adding codes to your lender list build. This means you can now have charging library targets available for searching but still block their code(s) and avoid accidental charges/fees! More information available in our **FAQ** here: <http://ill.bceln.ca/faq-blocked-lenders>

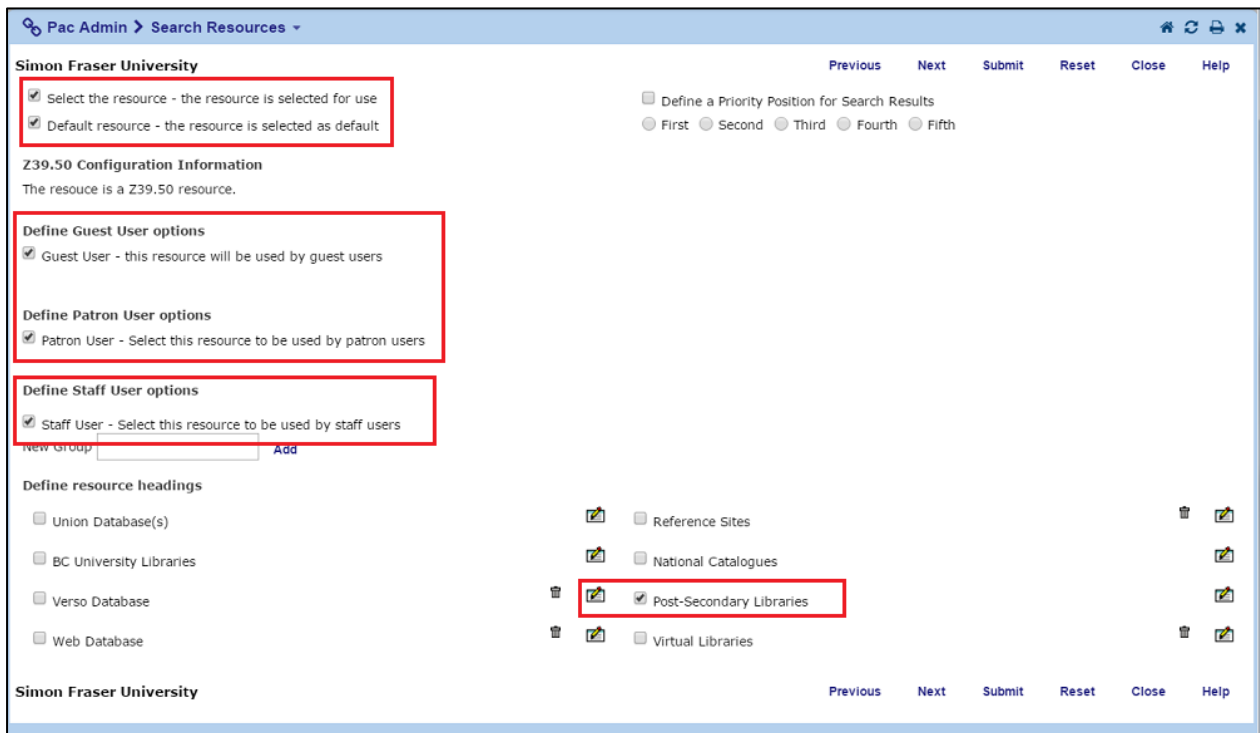
Configuring Search Resource/Target Display for Your Library:

Follow the steps below to configure how search targets display for your library:

1. Login to Outlook OnLine with an account that has **Administrative** permissions.
2. Click on the **Staff Dashboard > Pac Admin** tab > **Search Resources** option/link.
3. There will be a very long list of resources, and we recommend you use the search function in your browser (eg. Ctrl-F) to find the desired target. Or browse for the library that you want to add as a search target for either staff and/or patrons, and then click the **Add** or **Edit** button on the right-hand side.

Type	Name	Details	Results Order	Default	Guest	Patron	Staff	Edit
AG	OutLook Online	Groups are not configured			✓	✓	✓	✓ Edit
ZZ	Pemberton Public Library (SITKA)	Groups are not configured			X	X	X	X Add
ZZ	Pender Public Library (SITKA)	Groups are not configured			X	X	X	X Add
ZZ	Port Moody Public Library	Groups are not configured			X	X	X	X Add
ZZ	Richmond Public Library	Groups are not configured			X	X	X	X Add
ZZ	Royal Roads University	Groups are not configured			X	X	X	X Add
ZZ	Sechelt Public Library (SITKA)	Groups are not configured			X	X	X	X Add
ZZ	Simon Fraser University	Groups are not configured			✓	✓	✓	✓ Edit
ZZ	Sitka - All Libraries (DO NOT USE)	Groups are not configured			X	X	X	X Add
ZZ	Squamish Public Library (SITKA)	Groups are not configured			X	X	X	✓ Edit
ZZ	Surrey Public Library	Groups are not configured			X	X	X	X Add
ZZ	Troubleshooting ELN Serials	Groups are not configured			X	X	X	X Add
ZZ	Troubleshooting Outlook	Groups are not configured			X	X	X	X Add
ZZ	TWU Alloway Library	Groups are not configured			X	X	X	X Add
ZZ	University of Alberta	Groups are not configured			X	X	X	X Add
ZZ	University of British Columbia	Groups are not configured			✓	✓	✓	✓ Edit
ZZ	University of Northern British Columbia	Groups are not configured			X	X	X	✓ Edit
ZZ	University of Victoria	Groups are not configured			✓	✓	✓	✓ Edit

4. To enable the library as a search target:
 - a. **Activate a Target:** Check-off “**Select the resource – the resource is selected for use**” for this target to be used for searching and the ERTI smart-build algorithm.
 - b. **Default Target:** Check-off “**Default resource – the resource is selected as default**” to make this target a default search resource/target. This means that it will always be shown as checked-off in the search display and search results will display if available. We recommend that you only check-off defaults for frequently used Staff resources or to set defaults for guests/patrons. Staff can over-ride these defaults in their individual account settings using our **FAQ** here <<http://ill.bceln.ca/faq-my-favorite-resources>>.
 - c. **Guest/Patron Options:** Check-off both “**Guest User – this resource will be used by guest users**” and “**Patron User – Select this resource to be used by patron users**” to display this target to guests/patrons. As all our patrons search as guest users (not using logged in patron accounts) you currently need to check-off both options.
 - d. **Staff Options:** Check-off “**Staff User – Select this resource to be used by staff users**” to display this target to logged in staff accounts. If you want a resource/target to *only* display to Staff, check-off just this option and not the guest/patron options above.
 - e. **Resource Headings:** You can also choose which categories or “resource headings” a target will display under using the check-boxes in the “**Define resource headings**” section. See the section on page 4 for how to edit these Categories “Resource Headings”.
 - f. **Search Results Priorities:** You can also choose to define a priority position for search results. We recommend that you choose the **Outlook OnLine union database** as your top search result priority but you can also move other frequently used target results, eg. Simon Fraser University, higher in the search results using these options.
 - g. Don’t forget to click the **Submit** button to save your changes! You may need to logout and login again to refresh any changes and they may take a couple hours to display.



Editing the Resource Headings or Categories for the Search Resources/Targets:

If you don't like the wording of the Resource Headings categories you can edit the text of existing categories or add new ones – or even change the display order!

When logged in as an **Administrator** choose the option under **Staff Dashboard > Pac Admin > Define Resource Headings** to “**Add a New Heading**”, edit the text of an already existing heading, or change the sort order of the headings.

We recommend that you sort the union databases to the top. You can also set-up by default if a category is open (automatically displays all resources below the category) or collapsed (plusplus sign needs to be clicked to expand in the search display). Don't forget to click **Submit** to save your changes!

Headings without any resources assigned won't display in the search interface. You should also be able to remove any headings by deleting the text and clicking Submit. We recommend you make sure there aren't any resources assigned to that heading first before you delete.

The screenshot shows the 'Define Resource Headings' interface for the BC Electronic Library Network. It includes a table with the following data:

Headings	Order
BC Union Database(s)	0
BC University Z-Targets Only	1
BC College Libraries	2
BC Public Libraries	3
BC University Libraries	4
non-BC Catalogues	5
	6
	7

Each heading has a corresponding 'Folder Default' section with radio buttons for 'Open' and 'Close'. The 'Open' option is selected for all headings shown.

Have any questions or would like some assistance updating your Search Resources/Targets? Please contact the [Outlook OnLine Administrative Support Centre](#).