

The following report includes OutLook OnLine Administrative Centre support activities from January 1 to April 30, 2016, an action plan for future activities, and support case analysis.

Progress Report Highlights

Support for Existing SHAREit Functionality

- Configured, set-up and managed **Live Shelf Status**:
 - Added configuration/set-up of 3 additional new public and post-secondary sites with Live Shelf Status availability checks (via Z39.50).
 - Set-up in progress for another approximately 7 libraries, including the Sitka Z39.50 target that can be applied to activation of over 50 libraries as desired.

Communications & Marketing

- Developed and issued documentation on the launch of the **new interface re-design** for SHAREit, including an online video demonstration, screen capture guides, new features, and tips on how-to optimize functionality of the new interface within library workflows.
- Developed 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.

System Optimisations and SHAREit Enhancements

- Implemented in coordination with Auto-Graphics, an **encryption certificate and security upgrade** to our Canadian servers to facilitate privacy-compliant Patron-Initiated Interlibrary Loans.
- Performed testing of the **new mobile scalable interface** re-design for SHAREit and provided feedback to Auto-Graphics on defects/bugs and issues. Provided information to library sites on the upcoming new interface including video demonstrations, new features and outstanding issues.
- Coordinating and implementing **Patron-Initiated ILL (PI-ILL)**:
 - Created a variety of documentation to assist libraries in implementing Patron-Initiated Interlibrary Loans including guides and templates for customising their Staff and Patron forms.
 - Received a commitment from Auto-Graphics (A-G) to implement a Privacy Disclaimer notice on customisable guest/patron forms (currently in A-G Q&A Testing) to facilitate privacy-compliant PI ILLs.
 - Assisted multiple test site libraries, such as Pender Island Library and North Island College, to implement PI-ILLs using the guides, which will be launched as soon as privacy-compliant PI ILLs are available within the system.

OutLook OnLine Administrative Centre Progress Report

Support for Existing SHAREit Functionality

Progress

- Responded to and managed 232 support cases from public and post-secondary libraries, predominantly regarding issues with the SHAREit software interface upgrade/transition, Z39.50 set-up & mapping, live shelf status, enhanced requesting & lender lists, ILL request issues, and bugs/error messages; when applicable, followed up with A-G to help resolve issues.
- Configured, set-up and managed Z39.50 Targets:
 - Added configuration/set-up of 3 additional new public and post-secondary sites with Z39.50 Targets and Live Shelf Status availability checks.
 - Another approximately 7 in-progress libraries, including the Sitka Z39.50 target that can be applied to activation of over 50 libraries as desired, to set-up z-targets and shelf status.
 - Worked with A-G to investigate why ILL requests created from Z39.50 records often included missing or blank Title details. Communicated work-arounds to libraries while coordinating with the vendor to develop and implement a bug fix as quickly as possible
 - Coordinated with BC Co-op to help trouble-shoot and identify a search issue with the Sitka Z39.50 server resulting in slow retrieval of results that they are currently resolving before activation of SITKA library sites.
- Activated, set-up and maintained Live Shelf Status:
 - Worked with libraries to successfully activate live shelf status checks at 1 configured library while continuing to work with A-G to develop a holdings retrieval fix so the 2 remaining completely configured libraries can also soon be successfully activated.
 - Investigated with A-G erroneous live shelf check rejections and resolved vendor Holdings retrieval issues with some libraries in order to facilitate successful live shelf status activation for all currently configured sites.
 - Coordinated with library sites to perform updates and maintenance on an additional 3 current live shelf status libraries including configuration/mapping of new locations & statuses to optimize their shelf checking functionality and resolve reported erroneous live shelf check rejections.
- Coordination and liaison on ISO issues:
 - Liaison 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.
- 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.
- Coordinated a Lender code change for the Justice Institute of British Columbia (BVAJ -> BVAJI) along with the vendor and all member library sites.

Communications & Marketing

Progress

- Developed and issued documentation on the launch of the new interface re-design for SHAREit, including an online video demonstration, screen capture guides, new features, and tips on how-to optimize functionality of the new interface within your workflow.
- Maintained the OLOL Administrative Support Centre website with new and updated communications including 15 guides, 21 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.
- Developed 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.
- Resources Sharing Coordinator offered and accepted the position of A-G User Group Chairperson for the coming year.
- Successfully negotiated 2016/17 license renewal with Auto-Graphics.
- Negotiated Canadian server hosting 2016/17 renewal with BC Libraries Co-op.

Optimisations and New SHAREit Features

Progress

- Performed testing of the new mobile scalable interface re-design for SHAREit and provided feedback to A-G on defects/bugs and issues. Provided information to our library sites on the upcoming new interface including video demonstrations, new features and outstanding issues.
- Implemented in coordination with A-G, an encryption certificate and security upgrade to our Canadian servers to facilitate privacy-compliant PI-ILLs.
- Created a variety of documentation to assist libraries in implementing PI-ILLs including guides and templates for customising their Staff and Patron forms. Received a commitment from A-G to implement a Privacy Disclaimer notice on customisable guest/patron forms (currently in A-G Q&A Testing) to facilitate privacy-compliant PI ILLs. Assisted multiple test site libraries, such as Pender Island Library and North Island College, to implement PI-ILLs using the guides, which will be launched as soon as privacy-compliant PI ILLs are available within the system.
- Participated in a one-on-one meeting with the vendor to outline our desired enhancement changes and new feature requests for the upcoming Reports & Statistics module.
- Received a commitment from A-G to create and submit a Use Support Case for our 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.
- Participated in user group meeting with Auto-Graphics and other SHAREit consortia to discuss and stay abreast of updates and fixes to the software.
- Opened 24 Auto-Graphics Helpdesk questions many of which requested new features including the Blank Request Form, the new customisable Copy/Loan Forms, Z-Target Holdings retrievals improvements, foreign (French) language search improvements and many more. Achieved an approximately 71% resolution rate from Auto-Graphics including over 45% of Helpdesk cases resulting in a new feature request, defect or bug fix implemented by the vendor.

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 <i>[for post-secondary and InterLINK libraries]</i>	COMPLETE	
Identify holdings retrieval issues & resolve with vendor	September 2015	Fix Developed
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 <i>[in consultation with Libraries Branch]</i>	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	
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.

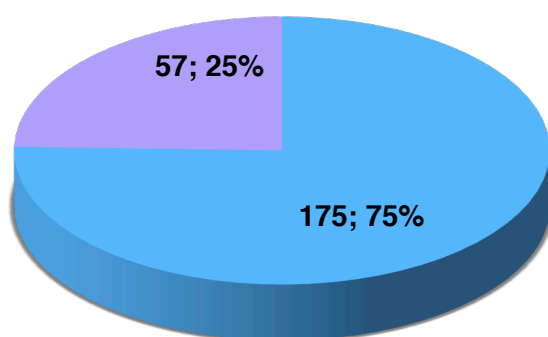
Public vs. Post-Secondary

Category	Post-Secondary	Public
ERTI Request Issues	3	8
Holiday / Closures		2
ILL Requests	7	17
ISO	12	1
Lender List Issues & Policies		6
Live Shelf Status	2	26
Login / Access		3
Other	1	6
Other Bugs / Errors	1	19
Patron-Initiated ILL	1	9
Settings & Configuration	8	9
SHAREit Software Issues & Enhancement Requests	13	31
Statistics		5
Union Database	2	4
Z-Target Set-Up & Issues	7	29
Total Support Cases	57	175

Public Library by Size

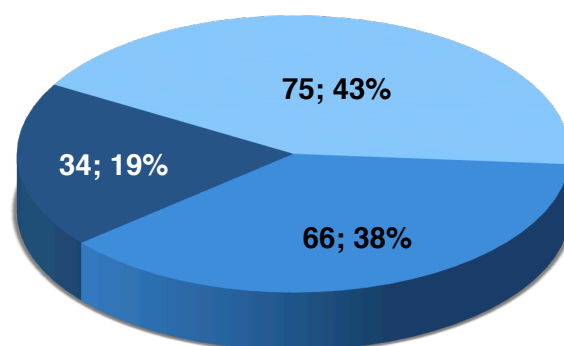
Small (< 40,000)	Large (> 40,000)	VPL
3	3	2
2		
10	2	5
		1
4	1	1
4	16	6
2	1	
3	2	1
9	5	5
6	3	
7	2	
19	5	7
	5	
	1	3
6	20	3
75	66	34

By Institution Type



■ Public ■ Post-secondary

By Public Library Size



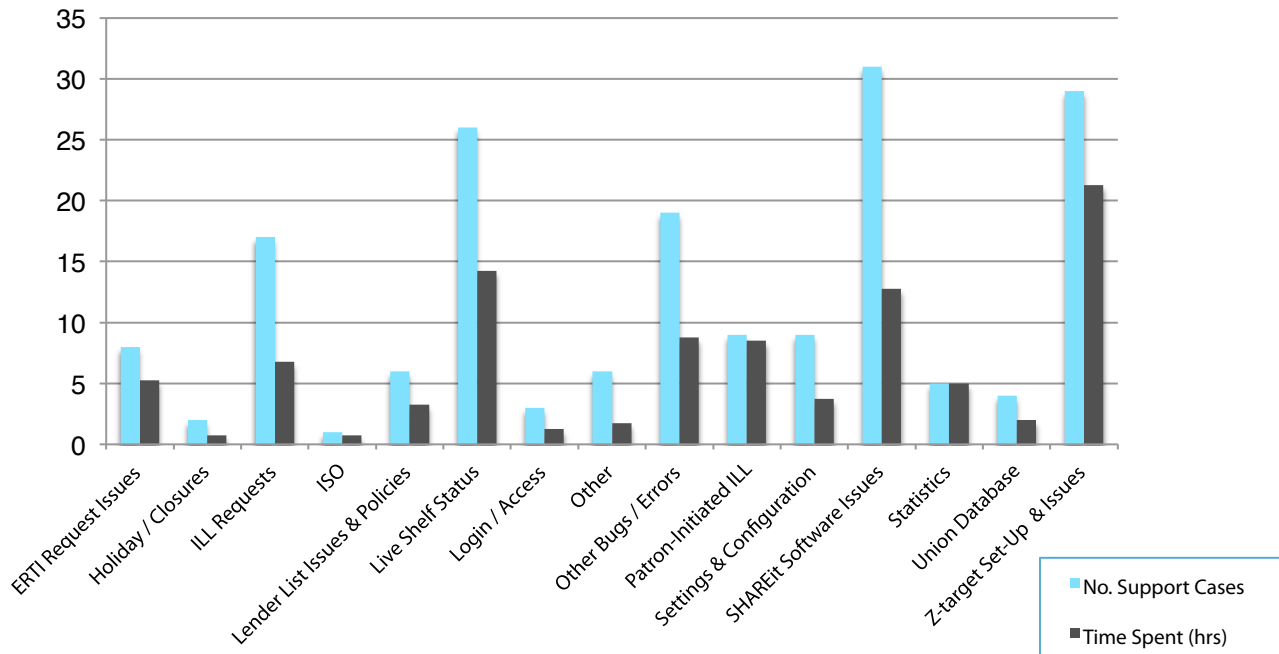
■ Small ■ Large ■ VPL

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.

Category	# of Support Cases	Time Spent (in hours)	% Resolved to Date
ERTI Request Issues	8	5.25	100%
Holiday / Closures	2	0.75	100%
ILL Requests	17	6.75	100%
ISO	1	0.75	100%
Lender List Issues & Policies	6	3.25	100%
Live Shelf Status	26	14.25	81%
Login / Access	3	1.25	100%
Other	6	1.75	100%
Other Bugs / Errors	19	8.75	100%
Patron-Initiated ILL	9	8.5	89%
Settings & Configuration	9	3.75	100%
SHAREit Software Issues & Enhancement Requests	31	12.75	87%
Statistics	5	5	100%
Union Database	4	2	75%
Z-Target Set-Up & Issues	29	21.25	100%

of Support Cases and Time Spent, by Category



Sample Support Case Queries from Each Category

ERTI Request Issues

Why do I have fines from the University of Victoria when I don't have them checked-off for Search Results?

Holidays / Closures

Why am I not receiving any ILL requests to process even though I'm back from holidays?

ILL Requests

Why am I not getting 8 Copies of my Book when I entered 8 in the Volumes Needed field?

ISO

Why are my BVIV requests not being updated in Outlook when the Relais library ships my item back?

Lender Lists Issues & Policies

How do I update my Lending Policies?

Live Shelf Status

Why is live shelf status rejecting my request when it shows as Available in their library?

Login/Access

Why am I seeing a Warning message saying this site isn't my library's Outlook OnLine site?

Other

Why are my items getting sent to the wrong shipping address?

Other Bugs / Errors

I can't print my requests lists from my browser after the new interface upgrade.

Patron-Initiated ILL

Can I set-up my patron Outlook forms to look like my print ILL forms?

Settings & Configuration

Can I add a new Branch location to my forms Picklist?

SHAREit Software Issues & Enhancement Requests

Why does my Guest/Patron Blank Request Form ask for patrons to provide at least 1 lender when they submit their form? They don't have the Lender List field or know the lender codes!

Statistics

According to my notes we should have at least 30 requests in this months statistics but I only see 2! Why are the stats wrong?

Union Database

Can I exclude the BOOK CLUB SETS from our records uploaded to the Outlook OnLine Union Database?

Z-target Set-Up & Issues

I'm a Sitka site, can I set-up live shelf status checking for my library?