

BC ELN has been contracted to support BC public libraries using OutLook OnLine (LOL) from February 1, 2015 to January 31, 2016. The following report includes Admin Centre support activities from May 1 to August 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.	40%
Communications & Marketing	Feb - Jan 2016	On track.	25%
Managing Impacts of Transition to Canadian Hosting (includes brokering)	Feb - May 2015	Completed.	20%
System Optimisations and SHAREit Enhancements	Jun - Jan 2016	On track.	15%

Progress Report Highlights

Support for Existing SHAREit Functionality

- Responded to and managed 109 separate OutLook OnLine support cases from public libraries (out of 148 total), predominantly regarding issues with lender list builds, login/access, and error messages when submitting ILL requests.
- Worked closely with libraries and the vendor to resolve and/or escalate issues reported by libraries around live shelf status and Z39.50 connections.
- Developed best practices and updated documentation on uploading records to the union database to optimize union database functionality.

Communications & Marketing

- Communicated with libraries about the implementation of the ERTI algorithm and enabling lending policies in OutLook OnLine.
- Conducted 6 online training sessions and recorded a webinar on new ERTI functionality.
- Presented on OutLook OnLine at the Beyond Hope conference (June 1-2, 2015).

Managing Impacts of Transition to Canadian Hosting

- Continued to broker public library ILL requests sent through OutLook OnLine to Relais-ISO libraries from May 1 to May 19, 2015. (102 out of 154 requests brokered for public libraries.)
- Identified with libraries issues that arose with the transition to Canadian hosting and worked closely with BC Libraries Co-op and Auto-Graphics to resolve these problems.

System Optimisations and SHAREit Enhancements

- Participated in bi-weekly Auto-Graphics tech updates and quarterly user group meetings with the vendor and other SHAREit consortia to discuss and stay abreast of possible SHAREit enhancements, including customisable patron forms.

OutLook OnLine Administrative Centre Progress Report

Support for Existing SHAREit Functionality

Progress

- Responded to and managed 109 separate OutLook OnLine support cases from public libraries, predominantly regarding issues with lender list builds, login/access, and error messages when submitting ILL requests; when applicable, followed up with vendor to help resolve issues.
 - Communicated with libraries, vendors and BC Libraries Co-op to identify and resolve server load issues that arose shortly after the transition to Canadian hosting.
 - Worked closely with vendor to identify why BPL is being skipped as a lender; implemented a temporary workaround while vendor develops a long-term solution.
 - Served as a liaison between libraries, Auto-Graphics and SirsiDynix to resolve issues with holdings display that affected VPL, BPL, and Surrey Libraries.
- Created documentation on configuring pre-populated SHAREit searches in their ILS, eliminating the need for patrons to retype their searches into OutLook.
- Developed best practices and updated FTP procedures for uploading records to the union database; encouraged all public libraries to conduct a full strip and reload of catalogue records to the union database.
- Created documentation on the status of all on-going support for existing SHAREit functionality, for the transition to a new Administrative Centre staff person.

Communications & Marketing

Progress

- Communicated with libraries about the timeline and implementation of the ERTI algorithm and created a support page with all relevant ERTI information.
- Offered 6 online training sessions to prepare libraries for the changes involving ERTI, between July 8 and August 20.
- Recorded an ERTI training tutorial for libraries to view as needed.
- Liaised with Auto-Graphics to plan a two-month schedule for the implementation of ERTI for all BC libraries.
- Communicated instructions on how to enable and set up lending policies in OutLook OnLine to all libraries.
- Migrated all support documentation to a new OutLook OnLine website.
- Presented on OutLook OnLine at the Beyond Hope conference (June 1-2, 2015), with around 25 attendees from public and post-secondary libraries.
- Developed a rebranding action plan in preparation for the proposed rebranding of the OutLook OnLine service and union database.
- Consulted with selected libraries on the rebranding action plan.
- Confirmed timeline for rebranding with Auto-Graphics.

- Created documentation on the status of all on-going support for existing SHAREit functionality, for the transition to a new Administrative Centre staff person.
- Created documentation on the status of all on-going communications and marketing work, for the transition to a new Administrative Centre staff person.

Managed Impacts of Transition to Canadian Hosting

Progress

- Continued to broker public library ILL requests sent through Outlook OnLine to Relais-ISO libraries from May 1 to May 19, 2015. (102 requests were brokered for public libraries, out of a total number of 154 requests.)
- Kept libraries informed of the issues that arose following the transition to Canadian hosting. Worked closely with BC Libraries Co-op and Auto-Graphics to resolve these issues.
- Negotiated and managed BC Libraries Co-op invoice for server hosting.

Optimisations and New SHAREit Features

Progress

- Worked with libraries and vendor to fix Z39.50 connection issues.
 - Created documentation to track the status of Z39.50 connections and holdings information for libraries that have been set up in Outlook OnLine as possible Z targets.
 - Identified and notified vendor of SHAREit issues with location definitions. 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.
- Created documentation on how to set up Lending Policies in Outlook OnLine.
- Requested update from vendor on status of simplified patron forms for ILL requesting.
- Created documentation on the status of all on-going optimisations and also new SHAREit features for the transition to a new Administrative Centre staff person.
- Attended quarterly Auto-Graphics user group meetings to stay abreast of developments around possible SHAREit enhancements, including customisable patron forms.
- Monitored Auto-Graphics user group listserv and participated in discussions on technical issues, user group meeting topics, training issues, and possible enhancements.
- Attended bi-weekly Auto-Graphics tech update meetings to stay abreast of SHAREit updates.

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 <i>[mostly post-sec in coordination with public libraries]</i>	April 2015	PS/IL COMPLETE
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
Implement & support Enhanced Request This Item (ERTI) <i>(previously named SSS)</i>		COMPLETE
Identify issues with current union database		COMPLETE
Refresh union database policies and practises		COMPLETE
Communications & Marketing		
Update Commons support materials		COMPLETE
Adapt existing support materials for all libraries		COMPLETE
Develop centralised OLOL support website	Underway	October 2015
Build, publish comprehensive ILL contacts list	Underway	On-going
Deliver OLOL training at Beyond Hope conference		COMPLETE
Rebrand union database to differentiate different tools	June 2015	September 2015
Rebrand OLOL service	June 2015	September 2015
Managing Impacts of Transition to Canadian Hosting - COMPLETE		
System Optimisations and SHAREit Enhancements		
Facilitate vendor development of customisable patron form	Underway	September 2015
Identify & recommend union database optimisations	Underway	On-going
Explore virtual participation for union database participants <i>[in consultation with Libraries Branch]</i>	June 2015	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 functionality as desired	November 2015	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. Sample queries from each category are included at the end of the report.

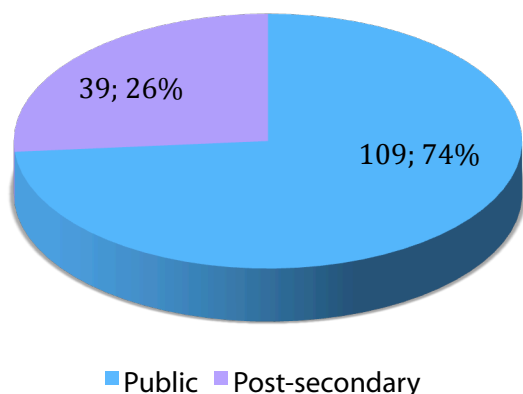
Public vs. Post-Secondary

Category	Post-Secondary	Public
ILL Requesting	13	26
Lender Lists	2	16
Login/Access	2	1
Patron-Initiated ILL		10
Settings	4	11
SHAREit Software Issues	1	4
Training/Requests for Information		6
Transition to Canadian Hosting	4	14
Union Database	10	13
Z-target	3	8
Total Support Cases	39	109

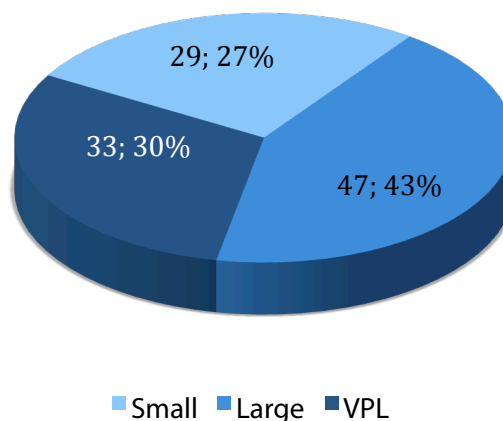
Breakdown of Public Libraries by Size

Small (< 40,000)	Large (> 40,000)	VPL
8	11	7
6	7	3
	1	
7	3	
4	4	3
	3	1
1	1	4
2	7	5
1	7	5
	3	5
29	47	33

By Institution Type



By Public Library Size

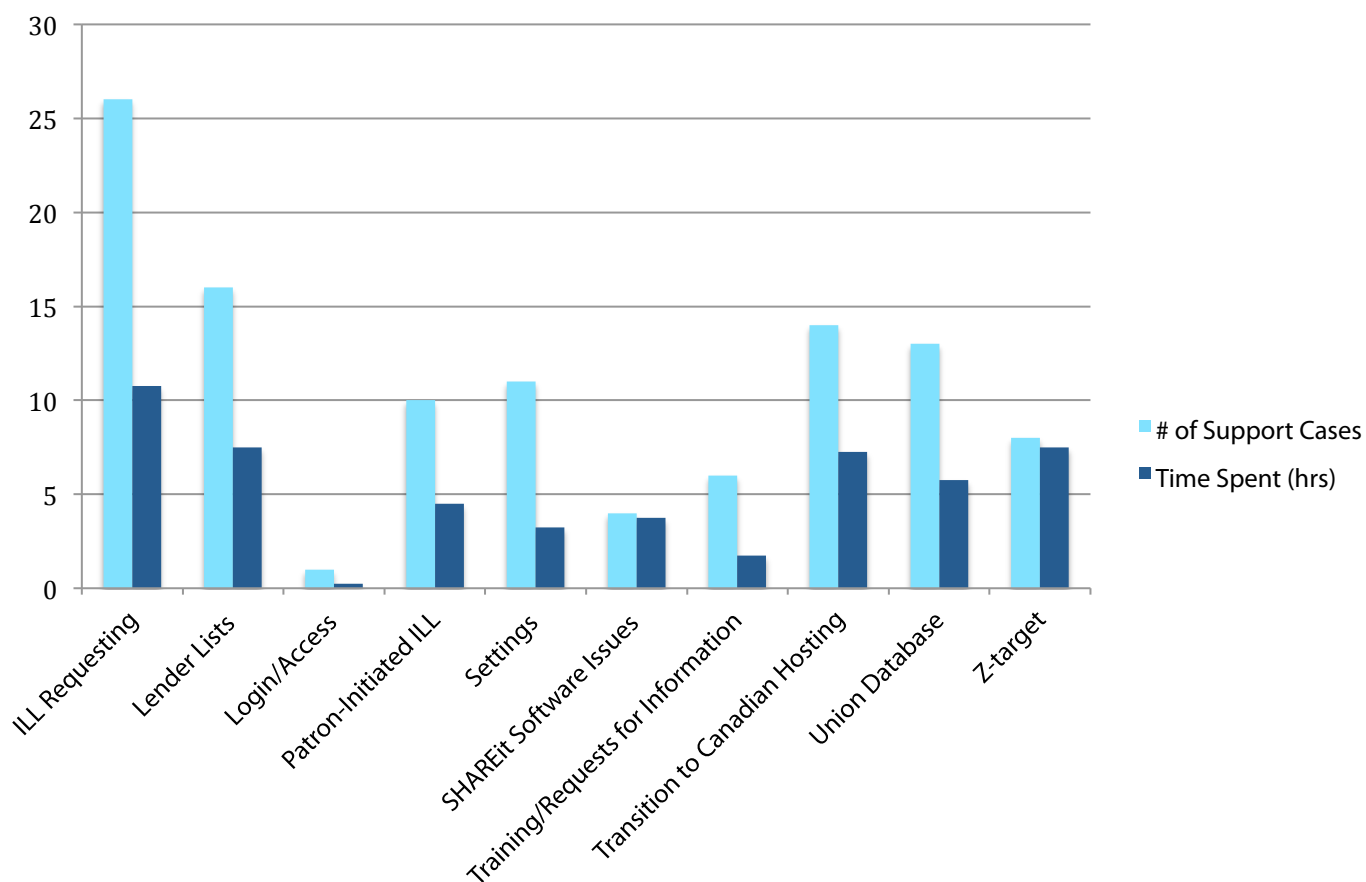


Support Case Categories, by Number and Time Spent

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
ILL Requesting	26	10.75	96%
Lender Lists	16	7.50	88%
Login/Access	1	0.25	100%
Patron-Initiated ILL	10	4.50	90%
Settings	11	3.25	100%
SHAREit Software Issues	4	3.75	25%
Training/Requests for Information	6	1.75	100%
Transition to Canadian Hosting	14	7.25	100%
Union Database	13	5.75	100%
Z-target	8	7.50	88%

of Support Cases and Time Spent, by Category



Sample Support Case Queries from Each Category

ILL Requesting

- When the ERTI algorithm is turned on, do libraries with checked out items get skipped as lenders if live shelf status is enabled?

Lender Lists

- With lender lists being built in the new Awaiting Lenders status, is there a way to get a full list of potential lenders without having to submit an ILL request?
- Can we change our settings so that it will be impossible for a charging library to end up as a lender in Outlook OnLine?

Login/Access

- Why am I unable to log into any of the Outlook OnLine library accounts using the administrative username and passwords?

Patron-Initiated ILL

- Why is it that our patrons are no longer receiving automatic Received emails when their requested items are received by the library and the status is changed in Outlook OnLine accordingly?

Settings

- What changes will be noticed by staff users if the lending policies in Outlook OnLine are turned on?

SHAREit Software Issues

- Why does Burnaby keep getting skipped as a lender, even though the item is available in the Burnaby catalogue? What are some workarounds so that ILL requests can be sent to Burnaby?

Training/Requests for Information

- How does the Outlook OnLine system count statistics?

Transition to Canadian Hosting

- How will libraries receive requests from Relais libraries during the transition?
- Are there problems with Outlook OnLine's servers? There seem to be problems with logging in and searching Outlook OnLine.

Union Database

- When searching for a particular title, why does Outlook OnLine bring back seemingly completely unrelated search results?
- Why is Outlook OnLine showing my library as owning the regular print version of a particular item, when we only own the large print?

Z-target

- Why is it that when you search certain libraries as Z targets, the bibliographic records are retrieved but there is no holdings information?
- Is there a reason why some libraries are being added to the lender list, but are then being skipped when the request is being forwarded to potential lenders?