

The following report includes OutLook OnLine (OLOL) Administrative Support Centre activities from January 1 to June 30, 2018, an action plan for future activities, and support case analysis.

Support for Existing SHAREit Software Functionality

Progress

- Responded to and managed **204 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 ILL Request issues.
- Opened **13 Auto-Graphics (A-G) Helpdesk tickets** via the A-G ticketing system or telephone, reporting a variety of issues related to Live Shelf Status, ISO issues, Statistics, Server errors/issues and various Software issues & enhancement requests. Approximately 62% of our tickets were resolved with the remaining 38% generating ongoing Defect or Feature Enhancement tickets that are currently assigned to Development.
 - Continued to work with A-G and BC Libraries Co-op on an issue with SITKA Z39.50 server live shelf checks. Auto-Graphics recently applied a software fix that made improvements but we are currently collecting data to re-open the ticket as the issues aren't completely resolved.
- Configured, set-up and managed **Z39.50 Search Targets** including the new **Voilà Registered Z93.50, New Westminster Public Library (NWPL), North Island College (NIC), Coast Mountain College (CMTN) and Greater Victoria Public Library (GVPL)**.
- Activated, set-up and maintained **Live Shelf Status** for multiple sites including activating LSS checks for **Coast Mountain College (CMTN) and Greater Victoria Public Library (GVPL)**.
- Investigated and coordinated a server migration from commercial hosting to the SFU state-of-the-art cloud hosting facility for optimisations and sustainability of the service. Transition delayed from spring 2018 due to technical difficulties but is expected to proceed summer/fall 2018.

Communications, Training & Marketing

Progress

- Participated in the **2018 A-G User Group meetings** focused on current & future trends in ILL including privacy, delivery & e-resource integration, app & mobile text notifications, and training as well as software development feedback concerning the re-coded Version 6 of SHAREit in 2018.
- Participated in the **2018 Academic A-G Focus Groups** for development of peer-to-peer requesting (non-SHAREit requesting/tracking), OpenURL request population, single-sign-on integration, desktop delivery and more.
- 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 Search Widgets, Desktop Delivery direct to Patrons, Privacy Disclaimer Notices & ILL Restrictions, Guest Request ILL Limits, Search Resource/Target Configuration (including Voilà), Social Media within OLOL, and Blank Requests & Live Shelf Status.

- Presented results of the feedback and data from the **OLOL Union Databases** survey to the **BCCATS Spring 2018 Annual Meeting** to inform them of proposed actions regarding union database cleanup.
- Maintained the **OLOL Admin Centre support website** with new and updated communications including creating or updating 10 guides, 29 FAQs, 10 e-training videos/tutorials, semi-annual reports and multiple News notices of software/server updates and downtime: <http://ill.bceln.ca/>
- Created new FAQ/Guides on Out-of-Province Requesting that integrated workflow processes & tips gathered from interviews with multiple libraries.
- Communicated with OCLC regarding the LAC transition and access to the Voilà Registered Z93.50 Search Target for BC Libraries.
- Delivered the 2nd **OLOL Admin Support Centre Newsletter in May 2018** available at: <https://ill.bceln.ca/reports>
- Attended A-G User Group Quarterly meetings as **Chair of User Group**.

Optimisations and New SHAREit Features

Progress

- Coordinated with Auto-Graphics to implement the **Guest Request Limits** feature for 8 interested libraries and assisted with implementation of patron requesting limits for multiple sites including Burnaby Public Library, Greater Victoria Public Library, Pender Island Public Library, New Westminster Public Library, and Vancouver Public Library.
- Investigated and created a Search Widget to assist libraries with embedding a site-specific Outlook OnLine search directly on their website pages.
- Coordinated, updated and implemented **Patron-Initiated ILL (PI-ILL)**:
 - Assisted Burnaby Public Library (BPL) to implement privacy compliant PI-ILLs through email/telephone support.
 - Assisted sites with updating and improving their PI-ILL implementation including Greater Victoria Public Library, New Westminster Public Library, Pender Island Public Library, Salt Spring Public Library, and Vancouver Public Library.
 - Coordinated with Post-secondary libraries, InterLINK and BC Public Libraries Branch to achieve full privacy compliance, through Privacy Disclaimer Notices, of all libraries using patron-initiated requesting. Currently all PI-ILL public & academic libraries within Outlook OnLine are privacy compliant.
- **Updated documentation** on PI-ILLs, Search Target/Resource Configuration, Guest Patron Request Limits, Amicus/Voila Registered Z39.50 searching, Out-of-Province Requesting, Desktop Delivery and more as new features and fixes became available from A-G.
- Updated a variety of **live shelf status** sites to use the new **wildcards** feature, requested by our consortium and recently implemented by A-G. Offered wildcard optimisations and new live shelf status set-ups via announcements and direct email communications.

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:
<https://ill.bceln.ca/reports>

Planned Deliverable	Status
<i>Support for Existing SHAREit Functionality</i>	
Implement live shelf status where possible	On-going
Coordinate set-up of ISO ILL with new BC Relais libraries	On-going
Investigate set-up of ISO ILL with out-of-province 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	Complete
Coordinate migration of the SHAREit software from commercial servers to SFU cloud hosting for optimization and sustainability	On-going
<i>Communications & Marketing</i>	
Create & execute a series of library staff surveys to assess satisfaction with support, training needs, union databases, software, 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 & cleanup union database(s) to differentiate tools	Summer 2019
Rebrand OLOL service	Winter 2018/ Spring 2019
Support Yukon Public Libraries joining OLOL	On-going
<i>System Optimisations and SHAREit Enhancements</i>	
Support libraries through the software transition to the re-coded version 6 of SHAREit	Winter 2018/ Spring 2019
Identify & recommend union database optimisations	Complete
Support libraries implementing Patron-initiated ILL	On-going
Achieve privacy compliance of all libraries with patron-initiated requesting	Complete
Investigate implementing NCIP functionality as desired	On-going
Support implementation of OpenURL pre-populated OLOL requests including from database vendors such as EBSCO & ProQuest	Delayed until Version 6 API
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 searching direct from database vendors (eg. EBSCO)	Complete
Support implementation of Enhanced Desktop Delivery	Complete

Support Case Analysis

Support Cases, by Category and Institution Type

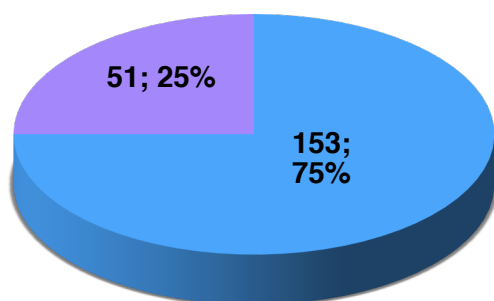
The tables below break down the total number of support cases by category and by institution type. In the table on the right, public libraries are further broken down into small (serving populations under 40,000) and large (serving populations over 40,000) libraries. As we receive a high volume of cases from Vancouver Public Library, VPL requests have been pulled out to provide more accurate numbers for the rest of the province.

Category	Post-Secondary	Public
ERTI Request Issues	1	2
Holiday / Closures		8
ILL Requests	4	20
ISO	4	6
Lender List Issues & Policies	1	3
Live Shelf Status	2	9
Login / Access	2	5
Other	3	9
Other Bugs / Errors	2	7
Patron-Initiated ILL	9	32
Settings & Configuration	4	11
SHAREit Software Issues & Enhancement Requests	4	18
Statistics	2	5
Training	1	5
Union Database	4	4
Z-Target Set-Up & Issues	8	9
Total Support Cases	51	153

Small (< 40,000)	Large* (> 40,000)	VPL
2		
7	1	
4	11	5
	1	5
1	2	
4	5	
	5	
4	3	2
2	2	3
10	19	3
1	7	3
3	9	6
1	4	
	5	
2	1	1
1	4	4
42	79	32

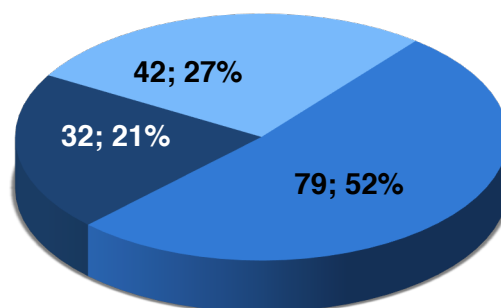
*This category is higher than usual due to an increase in support questions related to the brokering assistance provided by BC Public Libraries Branch (BVIL) site to multiple Reading Centres & Public Libraries.

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	2	1.25	100%
Holiday / Closures	8	2.75	100%
ILL Requests	20	12	100%
ISO	6	4.5	100%
Lender List Issues & Policies	3	1.75	100%
Live Shelf Status	9	7	78%
Login / Access	5	1.75	100%
Other	9	4	100%
Other Bugs/Errors	7	3.75	100%
Patron-Initiated ILL	32	19.75	97%
Settings & Configuration	11	10	100%
SHAREit Software Issues & Enhancement Requests	18	10.5	94%
Statistics	5	3.25	80%
Training/Requests	5	5.25	100%
Union Database	4	1.5	100%
Z-Target Set-Up & Issues	9	6.25	100%

of Support Cases and Time Spent, by Category

