

The following report includes OutLook OnLine (OLOL) Administrative Support Centre activities from January 1 to June 30, 2019, a high-level action plan for future activities, and support case analysis.

Support for Existing SHAREit Software Functionality

Progress

- Responded to and managed **271 support cases** from public libraries, including brokerage for multiple public Reading Centres, and post-secondary libraries. Questions were predominately regarding issues with Live Shelf Status/Checks, Out-of-Province Requesting, Union Databases, SHAREit bugs related to Version 5 software, and new features upcoming in Version 6.
- Opened **14 Auto-Graphics (A-G) Helpdesk tickets** via the A-G ticketing system or email/telephone, reporting a variety of issues related to the ERTI Smart-build, Statistics, Z39.50, Server errors/issues and various Software issues/bugs & enhancement requests.
- Maintained **Live Shelf Status** for multiple sites, and completed preliminary steps and consultation on activating LSS checks for **Vancouver Public Library (VPL)** and **Okanagan College (OC)**.
- Configured, set-up and managed **Z39.50 Search Targets** including **Okanagan College (OC)**, **Coast Mountain College (CMTM)**, and **Greater Victoria Public Library (GVPL)**.
- Activated a work-around for the RDA/AACR2 mis-match issue using the Blank Request form for all member libraries except, on their request, Vancouver Island Regional Library (BNVI).
- Investigated additional **Union Database cleanup options** with Auto-Graphics and started preliminary steps of the project by identifying records submitted with multiple 245 MARC fields. Over the next year, Member libraries will be notified of erroneous records so they can correct them prior to next year's final record refresh.

Communications, Training & Marketing

Progress

- Communicated progress and updates on the V6 software and rebrand of **OutLook OnLine** to **Illume** and renaming of the "OutLook Online" union database to the "BC Union Catalogue", including an online FAQ: <https://ill.bceln.ca/upgrade-rebrand-faq>
- Communicated upcoming IP, domain & email address changes for the V6 migration and Illume rebrand to all sites and specific information to our ISO Partner libraries.
- Developed multiple banners, logos & taglines for the **Illume rebrand**. Consulted with Libraries Branch on the final logo & banner option as well as the default tagline.
- Provided libraries with a Branding Toolkit to customise their upcoming Illume with library-specific banners & taglines that reflect their institutional identity. Branding Toolkit available here: <https://ill.bceln.ca/illume-toolkit>
- Delivered an Illume rebrand newsletter announcing the new logos, banners & taglines with a customizable **Rebranding Toolkit** available at: <https://ill.bceln.ca/reports>
- Developed an entirely **new website** for the **Illume** brand, via Drupal and custom Drupal views, including updating and re-organisation of all current guides and training under a simpler design. Also updated all FAQs possible before the migration while remaining FAQs will be added after the V6 launch and software changes have been assessed.

- Created and updated multiple guides on Out-of-Province requesting and Voila/Aurora, now that Amicus has been retired. Assisted sites with adding the new Voila Z39.50 search target directly to SHAREit.
- Provided training, advice & assistance to multiple libraries, including **Bowen Public Library, North Vancouver City Library, Vancouver Island Regional Library, Powell River Public Library, Sechelt Public Library, Squamish Public Library & Whistler Public Library** on steps for out-of-province requests.
- Consulted with Auto-Graphics and other consortia on the design of our top-voted enhancement request for the ability to configure the “Request This Item” button display based on format (eg. DVD), slated for development in 2019.
- Maintained the **LOL Admin Centre support website** with new and updated communications including creating or updating 8 guides, 17 FAQs, semi-annual reports and multiple News notices of software/server updates and downtime: <http://ill.bceln.ca/>
- Created new FAQ/Guides on a variety of topics including Overdue items and Lender’s Days to Return (including Lending Policy), Out-of-Province requesting and recommended Canadian catalogues, and the Canada Post Shipping Tool.
- Participated in the **Auto-Graphics 2019 User Group Conference**, discussing and providing feedback on a variety of software issues including current & future enhancements, the upcoming V6 software features, and managing Union Databases. Facilitated a session, as the **Chair of User Group**, on “What have we learned? Where do we go from here?” for multiple consortial customers.
- Attended A-G User Group Quarterly meetings as **Chair of User Group** and facilitated a process for identifying a new User Group Chair.

Optimisations and New SHAREit Features

Progress

- Coordinated and consulted with Libraries on the timeline and action plan for the V6 software upgrade and Illume re-brand.
- Worked with **Auto-Graphics** and **Simon Fraser University IT** to coordinate a server installation of the **new V6 software** and migration from V5 servers to separate V6 servers.
- Consulted with multiple libraries, including Burnaby Public Library, Vancouver Public Library & Richmond Public Library, on implementing NCIP. Communicated with Auto-Graphics to receive initial pricing and submitted a request for pricing revision to A-G before proceeding with the pilot projects.
- Coordinated, updated and implemented **Patron-Initiated ILL (PI-ILL)**:
 - Assisted **Fort Nelson Public Library** with reactivating privacy compliant PI-ILLs
 - Offered support to libraries, such as New Westminster Public Library, with updating their PI-ILLs to support their branch renovation.
 - Activated Guest Request ILL Limits for Richmond Public Library guest patrons and assisted multiple other sites with troubleshooting guest request limits and their PI-ILLs.

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 live shelf status member libraries to implement a work-around for RDA/AACR2 mismatch issues and promote options to member libraries	On-going
Coordinate with vendor to implement the ILL Review (Modify Existing Request) feature for all sites & implement a fix for an issue with UDB ERTI lender list builds	Complete
Coordinate migration of the SHAREit software to the new V6 version	July 15, 2019
<i>Communications & Marketing</i>	
Create & execute a series of library staff surveys to assess satisfaction with support, training needs, union databases, software, etc (next survey will be a V6 assessment after launch)	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	On-going
Rebrand OLOL service to Illume with the launch of V6	July 15, 2019
<i>System Optimisations and SHAREit Enhancements</i>	
Support libraries through software transition to the re-coded version 6 of SHAREit	Spr/Summ 2019
Implement the identified recommended union database optimisations	Summ/Fall 2019
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	Complete

Support Case Analysis

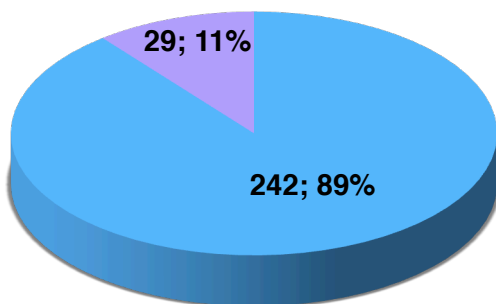
Support Cases, by Category and Institution Type

Below is the total support cases by category and institution type. Public libraries are further broken down into small (serving populations under 40,000) and large (populations over 40,000) libraries. The high volume of cases from Vancouver Public Library (VPL) and Reading Centre (BVIL) brokering requests have also been pulled out to provide more accurate numbers for the rest of the province.

Public vs. Post-Secondary

Category	Post-Secondary	Public
ERTI Smart-build	1	5
Holidays or Closures	1	8
ILL Request Support	2	100
ISO Issues	1	1
Live Shelf Status/Checks	1	15
Login & Access	1	1
NCIP		5
Network or Server Issues		1
Other	2	8
Other Bugs or Errors	2	5
Out-of-Province Requests	1	12
Patron-Initiated ILLs		9
Search Resources/Targets	1	4
Settings Configuration	4	6
SHAREit Enhancements/Features	6	13
SHAREit Software Issues & Bugs	3	22
Statistics Support		8
Training Support		7
Union Database	1	9
UX Customisation		1
Z-Target Set-Up & Issues	2	2
Total Support Cases	29	242

By Institution Type

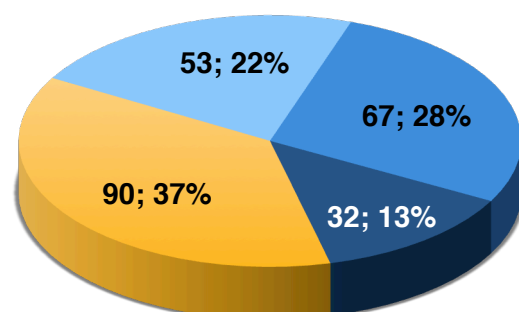


■ Public ■ Post-secondary

Public Library by Size

Small (< 40,000)	Large (> 40,000)	VPL	BVIL
1	2	2	
3	5		
3	7	5	85
1			
6	4	5	
			1
	2	3	
1			
1	7		
2	2		1
10	2		
3	5	1	
2	1	1	
4		2	
3	6	4	
10	8	4	
1	6	1	
1	3		3
1	6	2	
		1	
	1	1	
53	67	32	90

By Public Library Size



■ Small ■ Large ■ VPL ■ BVIL

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	# Support Cases	Time Spent (in hours)	% Resolved to Date
ERTI Smart-build	5	2.25	100%
Holiday or Closures	8	3.75	100%
ILL Request Support	100	26.925	100%
ISO Issues	1	0.25	100%
Live Shelf Status/Checks	15	6	93%
Login & Access	1	0.25	100%
NCIP	5	2	40%
Network or Server Issues	1	0.5	100%
Other	8	3	100%
Other Bugs or Errors	5	2	100%
Out-of-Province Requests	12	5.75	100%
Patron-Initiated ILLs	9	4.25	100%
Search Resources/Targets	4	2.5	100%
Settings Configuration	6	1.75	100%
SHAREit Enhancements/Features	13	6.25	100%
SHAREit Software Issues & Bugs	22	12.25	95%
Statistics Support	8	4.25	100%
Training Support	7	9	100%
Union Database	9	4	100%
UX Customisation	1	0.5	100%
Z-Target Set-Up & Issues	2	1.5	100%

of Support Cases and Time Spent, by Category

