

In March 2017 the OutLook OnLine Support Centre conducted an online survey to gather feedback, comments and suggestions regarding current training services and support needed. All interlibrary loan staff at both public and post-secondary organisations were encouraged to participate. A link to the online survey was shared multiple times with ILL listservs in both sectors. Multiple organisational responses were also encouraged and a PDF version of the survey was made available to facilitate discussion prior to completing the questionnaire online.

The results of the survey are summarized below. There were 10 survey questions. All data has been anonymized except for key comments. All comments are published with permission of the participant.

Number of Responses

36 BC public and post-secondary libraries responded, out of a possible 93, a 39% response rate with many institutions submitting multiple responses with different training requirements for various staff members.

- 44 complete surveys submitted
- 26 unique Public libraries responded
- 10 unique Post-secondary libraries responded

Background

The OutLook OnLine Support Centre was created in February 2015 with funding from the BC Ministry of Education's Public Libraries Branch and the BC Electronic Library Network (BC ELN). The Support Centre is hosted at BC ELN, and the OLOL Helpdesk is currently staffed 3 days a week. The Support Centre provides helpdesk and training support for the OutLook OnLine ILL management platform.

2015 was a developmental year, occupied with migrating the OutLook OnLine platform to Canadian hosting, the creation of a centralised OLOL support website <<https://ill.bceln.ca/>> and a change in Support Centre staffing. By 2016, the Support Centre was in operational mode, optimising the OLOL platform and rolling out enhanced functionality such as patron-initiated ILL.

As part of on-going service evaluation and goal-setting, this survey was initiated to gather feedback on OLOL training to identify training requirement areas for improvement or additional focus. This survey *only* pertained to training requirements delivered by the OLOL Support Centre, and was not related to OLOL software features or other ILL workflow processes. Future surveys will gather feedback related to the OLOL SHAREit software, union databases etc.

Key Findings

Results from the previous survey identified a desire for an increased focus in training - respondents indicated a desire for more documentation and development of online webinars. Most survey participants indicated they preferred training online in the format PDF Guides and FAQs via our website. Many also indicated they would appreciate online live webinar or pre-recorded screencast tutorials on various topics. For ILL Staff the most popular training topic was day-to-day tasks related to ILL Requests and for Administrators the most requested training topic was Statistics.

A. Demographics Section

Q1-3. Organisation Summary

- 31 completed responses from Public libraries
- 13 completed responses from Post-secondary libraries
- 17 Librarians or Library Administrators/Management/Directors responded
- 27 ILL Staff (Library Technicians, Assistants, Clerks, Volunteers or Other/Unknown) responded

A complete list of responding libraries is available in Appendix A.

B. Communication Section

Q4. How do you prefer to receive communications about upcoming or new Outlook OnLine training resources? (multiple selections allowed)

Responses:

- 36 – Listserv emails (EG. to 'ps-ill@sfu.ca' or 'interlinkill@interlinklibraries.ca')
- 8 – Announcement on our website
- 4 – Announcement on the Commons website
- 21 - Notification alerts within Outlook OnLine (new feature A-G may add)
- 2 - Other

Common Themes:

- Most participants indicated that they would like to receive communications where they're unlikely to be overlooked, for example via listserv emails (82%) and within Outlook OnLine alerts (new feature that may be added soon) (48%).
- Those that chose Other indicated they were interested in direct or individual emails.

Q5. If an in-person training session was made available during the week of the BC Library Association (BCLA) Conference (in Vancouver from April 18-21) would you attend?

Responses:

- 6 - Yes
- 19 – No
- 19 – Maybe (please explain below)

Key Themes:

- Most 'Maybe' responses (approximately 89% of the 'Maybe' category) indicated in the comments that they were unsure or unlikely to be able to attend due to time, staffing or budget constraints.
- Overall most (82%) indicated it unlikely they would be able to attend a training session at BCLA.
- One site indicated they would attend if the session was open to non-BCLA members – which it would be!

Key Comments:

- "Don't usually attend as it's far away and we have a limited budget." [Lillooet Area Library Association]

- “Not attending BCLA but we totally love video training. More convenient for a busy part-time ILL job. :)” [North Vancouver District Public Library]
- “Unfortunately I am unable to attend the conference this year. If however, I was able to I would be interested in a training session during that time.” [Capilano University]

Q6. If an in-person training session was made available during the Beyond Hope Conference (in Prince George from June 11-13) would you attend?

Responses:

- 5 - Yes
- 31 – No
- 8 – Maybe (please explain below)

Key Themes:

- Most responded ‘No’ (70%) they would be unable to attend a training session at Beyond Hope.
- Also most ‘Maybe’ responses indicated in the comments that they were unlikely to be able to attend due to time, staffing or budget constraints.

Key Comments:

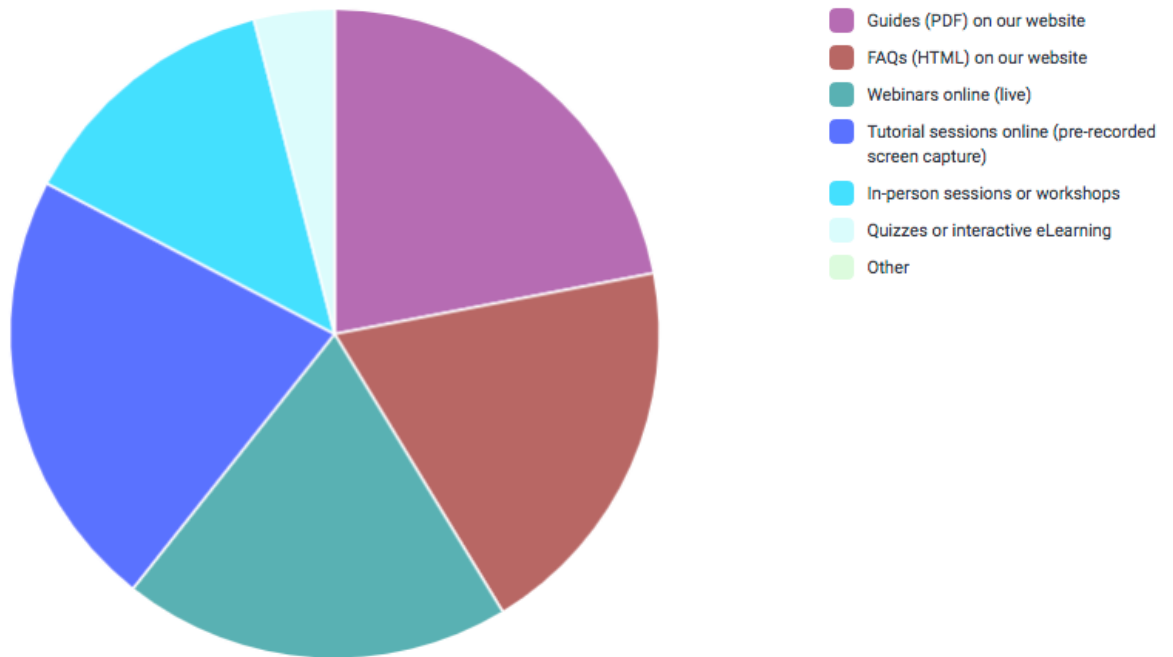
- “Depends on the subject matter. Although, I would be more likely to attend the Beyond Hope conference instead of the BCLA conference.” [Taylor Public Library]
- “Would prefer Beyond Hope as we are only an hour and a half away from Prince George. The board only sends the Chief Librarian to the BC Library Conference whereas all staff can attend Beyond Hope.” [Fraser Lake Public Library]

C. Delivery Section

Q7. What format do you prefer for your training resources? (check all that apply)

Responses:

- 33 - Guides (PDF) on our website
- 29 - FAQs (HTML) on our website
- 29 - Webinars online (live)
- 33 - Tutorial sessions online (pre-recorded screen capture)
- 20 - In-person sessions or workshops
- 6 - Quizzes or interactive eLearning
- 0 – Other



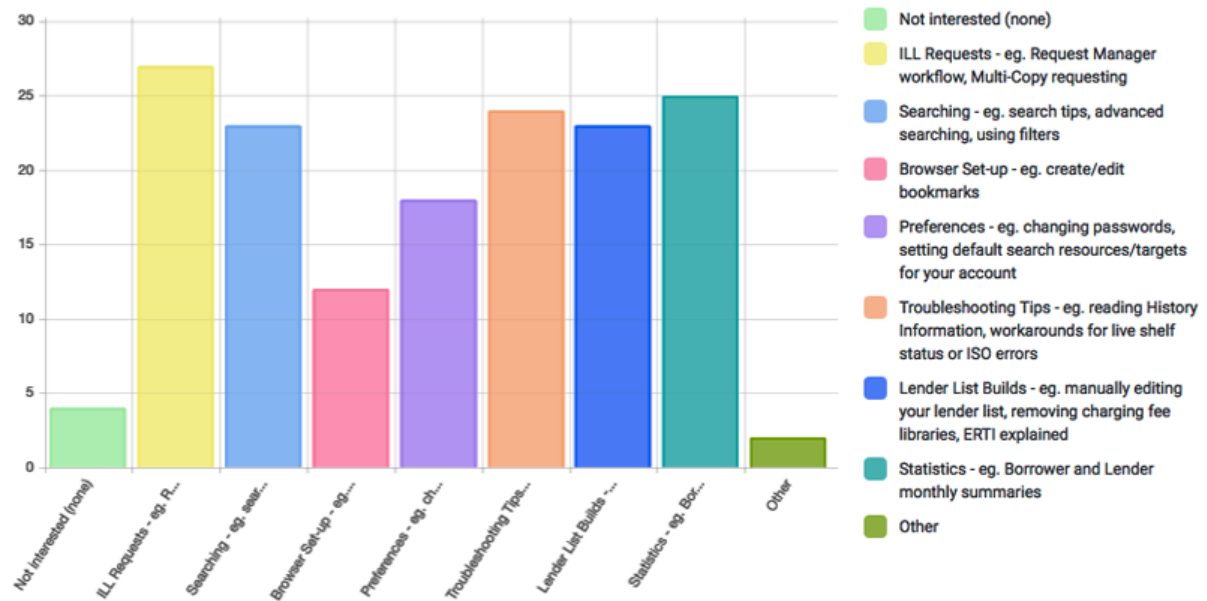
Key Themes:

- Most respondents preferred static resources on our website including **PDF guides** (75%) or **HTML FAQs** (66%).
- Many also indicated they would appreciate some form of online video training such as live **Webinars** (66%) and **pre-recorded screen capture tutorial sessions** (75%).
- Nearly half of respondents (45%) desired **in-person sessions or workshops**.
- Only 14% indicated a desire for **quizzes or interactive eLearning**.
- Alternative or **Other** options were not suggested.

Q8. For ILL Staff, what topics are you most interested in the support centre providing training on?

Responses:

- 4 - Not interested (none)
- 27 - ILL Requests - eg. Request Manager workflow, Multi-Copy requesting
- 23 - Searching - eg. search tips, advanced searching, using filters
- 12 - Browser Set-up - eg. create/edit bookmarks
- 12 - Preferences - eg. changing passwords, setting default search resources/targets for your account
- 24 - Troubleshooting Tips - eg. reading History Information, workarounds for live shelf status or ISO errors
- 23 - Lender List Builds - eg. manually editing your lender list, removing charging fee libraries, ERTI explained
- 25 - Statistics - eg. Borrower and Lender monthly summaries
- 2 - Other



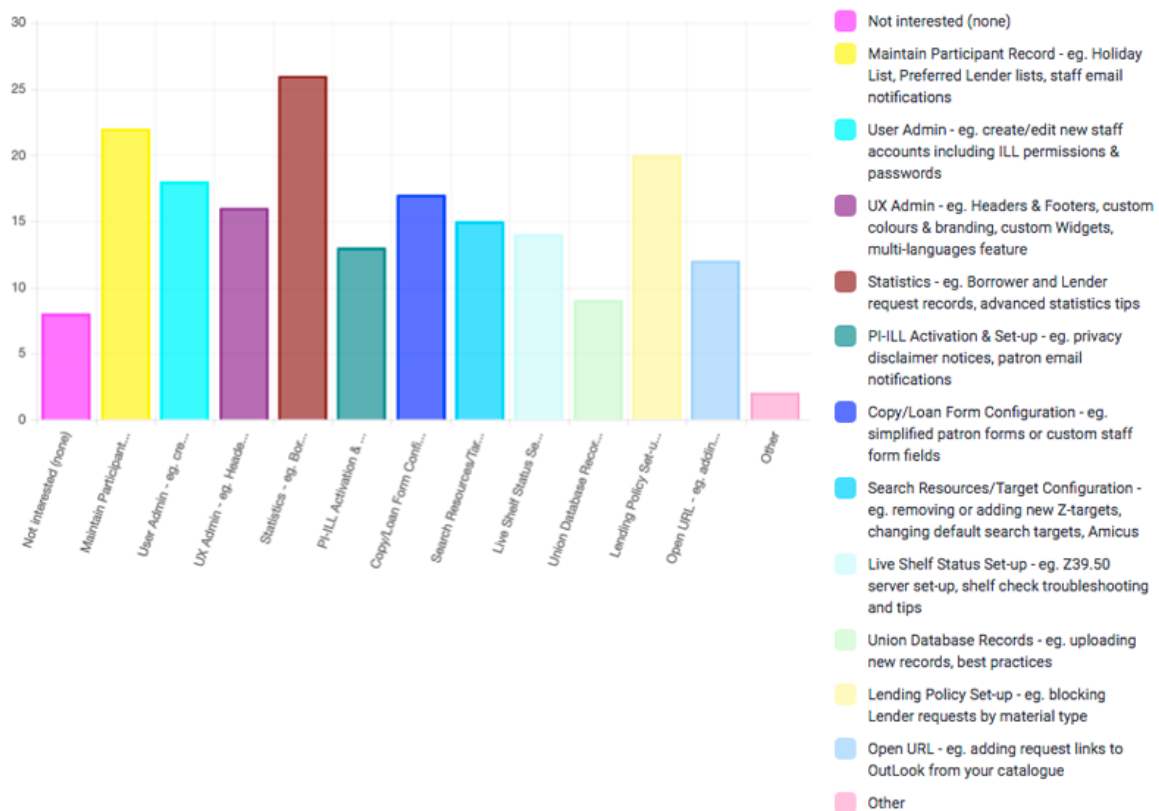
Key Themes:

- Most respondents (61%) were interested in ILL Staff training regarding day-to-day tasks related to **ILL Requests** such as Request Manager workflow and Multi-Copy requesting.
- Over half of respondents were also interested in more in-depth training in the system such as advanced **Search Tips** (52%), **Troubleshooting Tips** (55%), **Statistics** (57%) and **Lender List Builds** (52%).
- **Browser** (27%) and **Preferences** (40%) **configuration** were the least popular topics chosen.
- Other suggestions were related to “Articles in old newspapers” and a “Review of all” ILL Staff training tasks.

Q9. For Administrators, what topics are you most interested in the support centre providing training on?

Responses:

- 8 - Not interested (none)
- 22 - Maintain Participant Record - eg. Holiday List, Preferred Lender lists, staff email notifications
- 18 - User Admin - eg. create/edit new staff accounts including ILL permissions & passwords
- 16 - UX Admin - eg. Headers & Footers, custom colours & branding, custom Widgets, multi-languages feature
- 26 - Statistics - eg. Borrower and Lender request records, advanced statistics tips
- 13 - PI-ILL Activation & Set-up - eg. privacy disclaimer notices, patron email notifications
- 17 - Copy/Loan Form Configuration - eg. simplified patron forms or custom staff form fields
- 15 - Search Resources/Target Configuration - eg. removing or adding new Z-targets, changing default search targets, Amicus
- 14 - Live Shelf Status Set-up - eg. Z39.50 server set-up, shelf check troubleshooting and tips
- 9 - Union Database Records - eg. uploading new records, best practices
- 20 - Lending Policy Set-up - eg. blocking Lender requests by material type
- 12 - Open URL - eg. adding request links to Outlook from your catalogue
- 2 – Other



Key Themes:

- The most popular **Administrator** training topic was **Statistics** (59%).
- Close to half of respondents were also interested in key administrator tasks related to **Maintain Participant Record** (50%), **User Admin** (41%), and **Lending Policy Set-up** (46%).
- Approximately a third of respondents were interested in **UX Admin** (36%) and **Open URL** (27%) administrator training related to **customization and usability of their Outlook OnLine**.
- Over a third of respondents were interested in administrator tasks related to **Patron-Initiated Interlibrary Loans** including **PI-ILL Activation & Set-up** (30%) and **Copy/Loan Form Configuration** (39%).
- Approximately a third of respondents were interested in training to optimize their **Search Resources/Target Configuration** (34%) and **Live Shelf Status Set-up** (32%).
- Only 20% of respondents were interested in Administrator training related to **Union Database Records** including uploading new records and best practices.
- Other suggestions were a comment that “I am not an administrator” and a suggestion to “Review all” Administrator training tasks.

Q10. Would you like to suggest or describe any additional training topics or formats not listed above further? All additional comments welcome.

Responses:

- 11 - Commented
- 33 - No comment

Key Themes:

- Only 25% of respondents provided additional comments or feedback.
- Troubleshooting Tips for ISO-Relais Communications was also suggested as a training topic.
- Another suggestion was for an OLOL Newsletter including tips, features on new or unknown software functions/features, and interviews with various libraries (such as large libraries like VPL) about how they manage various workflows to help inform and improve ILL functionality at all member sites.
- Positive feedback and suggestions to add additional categories to our website to improve it's use were also suggested.

Sample Comments:

- "ISO COMMUNICATION WITH RELAIS - SETTINGS/ PROBLEM SOLVING ETC." [University of Victoria]
- "I believe training is essential as procedures are always evolving. Even if we are relatively proficient with Outlook, we may need a refresher and this sometimes reminds us of certain functions we may have forgotten. I answered both ILL staff and Administrators section as I deal with both. In the Administrators section I have left out topics pertaining to Patron Initiated Requests using Outlook as we are not using it at this time." [Vancouver Public Library]
- "We are more interested in having a great searchable one-stop area (such as the website) to help us troubleshoot and figure out issues as they arise. A resource that provides support similar to a manual and guide.
Some sort of update and/or newsletter that features particular features of OLOL that are new or perhaps not widely used would be great, as it could provide ideas on how to implement time-saving measures that are possible, or that other libraries utilize and recommend. Little scenarios or examples of how particular libraries (like VPL since they're so busy) manage certain workflows would be very interesting to hear about. Perhaps a bi-monthly "did you know" website post?" [Surrey Libraries]
- "I can only say I enjoy using Outlook, I think it's a great tool and I am very comfortable using it." [Fort Nelson Public Library]

Appendix A: Responding Libraries

Public Libraries

Alert Bay Public Library & Museum
Bowen Island Public Library
Coquitlam Public Library
Dawson Creek Municipal Public Library
Elkford Public Library
Fort Nelson Public Library
Fort St. James Public Library
Fort St. John Public Library
Fraser Lake Public Library
Fraser Valley Regional Library
Gibsons & District Public Library
Lillooet Area Library Association
New Westminster Public Library
North Vancouver City Library
North Vancouver District Public Library
Port Moody Public Library
Richmond Public Library
Rossland Public Library
Sechelt Public Library
Sparwood Public Library
Squamish Public Library
Surrey Libraries
Taylor Public Library
Vancouver Public Library
Vanderhoof Public Library
Whistler Public Library

Post-secondary Libraries

Capilano University
College of the Rockies
Douglas College
Emily Carr University of Art and Design
Justice Institute of BC
Langara College
North Island College
University of Northern British Columbia
University of Victoria
Vancouver Community College