

The following report includes OutLook OnLine (OLOL) Administrative Support Centre activities from July 1 to December 31, 2018, a high-level action plan for future activities, and support case analysis.

Support for Existing SHAREit Software Functionality

Progress

- Responded to and managed **209 support cases** from public and post-secondary libraries predominately regarding issues with Z-Target Set-Up & Issues, Live Shelf Status, Patron-Initiated Interlibrary Loan (PI-ILL) set-up, SHAREit software issues & enhancement requests and ILL Requests.
- Opened **12 Auto-Graphics (A-G) Helpdesk tickets** via the A-G ticketing system or email/telephone, reporting a variety of issues related to Statistics, Z39.50, Server errors/issues and various Software issues/bugs & enhancement requests.
- Set-up and maintained **Live Shelf Status** for multiple sites including re-activating LSS checks for **North Vancouver City (NVCL)** and **Coast Mountain College (CMTN)** after internal changes.
- Worked with Auto-Graphics, Simon Fraser University IT & BC Libraries Co-op to coordinate a server migration from Peer1 commercial hosting to SFU's state-of-the-art cloud hosting facility, in order to optimise and increase the sustainability of the OLOL service.
 - BC ELN staff tested the integrity of the software and site data at each step of the installation, including a test clone migration prior to the final server migration.
 - Server successfully migrated September 1-3 with minimal impact on libraries.
- Configured, set-up and managed **Z39.50 Search Targets** including the **University of Northern BC (UNBC)**, **Simon Fraser University (SFU)**, **Coast Mountain College (CMTN)** and **Greater Victoria Public Library (GVPL)**.
- Contacted all member libraries currently using live shelf availability checking (LSS) within OLOL to implement a work-around for the RDA/AACR2 mis-match issue.
- Provided in-depth ILL software & workflow training and support to new BC Public Libraries Branch staff supporting Reading Centres using the BVIL OLOL site for their borrower requesting.

Communications, Training & Marketing

Progress

- Communicated progress and updates on the server migration from commercial hosting to the SFU state-of-the-art cloud hosting facility to all OLOL member libraries and ISO-partner libraries.
- Participated in, and helped to develop, the updated **2019 A-G Enhancement voting process system** focused on rating/scoring outstanding and new enhancement requests.
- Advocated for various enhancements requested by BCUC libraries, including the option to configure the "Request This Item" button display based on format (eg. DVD), an enhancement slated for development in 2019.
- Participated in demonstrations and learning sessions from A-G on the re-coded Version 6 of SHAREit due for release the end of 1st Quarter 2019. Provided feedback and enhancement requests for V6.

- 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 the new ILL Review feature and Borrower & Lender Basic Workflows for refresher training or new staff.
- Presented at a meeting of InterLINK ILL frontline staff; provided a report on recent Admin Centre activities, an update on InterLINK-specific optimisations, and an **OLOL System Health Checklist**, now available for all member libraries via OLOL support site <<http://ill.bceln.ca>>.
- Maintained the **OLOL Admin Centre support website** with new and updated communications including creating or updating 10 guides, 15 FAQs, 5 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 a variety of topics including using Undo Shipped, Expiry (Need by) Dates and Reading Centre workflow.
- Delivered the 3rd **OLOL Admin Support Centre Newsletter in October 2018** available at: <https://ill.bceln.ca/reports>
- Attended A-G User Group Quarterly meetings as **Chair of User Group**.
- Provided information about OLOL union databases to Libraries Branch to support consultations with LAC/OCLC, along with feedback from member libraries interested in Voilà participation.

Optimisations and New SHAREit Features

Progress

- Coordinated with Auto-Graphics to implement the **ILL Review (Modify Existing Request)** feature for multiple interested libraries.
 - This powerful feature allows ILL Staff to easily modify existing borrower requests, created by Patrons or Staff, to assign a new “better” record and/or automatic Lender List build.
 - Previously ILL Staff had to manually update a request or re-create a duplicate from scratch which deleted the ability for patrons to track a request via SHAREit.
 - The ILL Review feature maintains Patron Tracking options and allows ILL Staff to assign new “better” records or lender list builds to assist with live shelf status mis-matches and improved lender fulfillment.
- Coordinated, updated and implemented **Patron-Initiated ILL (PI-ILL)**:
 - Assisted Radium Hot Springs and Lillooet Public Library to implement privacy compliant PI-ILLs through email/telephone support and provided support information to additional interested sites such as Elkford Public Library.
 - Assisted sites with updating and improving their PI-ILL implementation including Pender Island Public Library and Vancouver Public Library.
 - Assisted sites with investigating and/or implementing the Guest Request Limits feature, such as Radium Hot Springs Public Library.
- **Updated documentation** on PI-ILLs, Search Target/Resource Configuration, Guest Patron Request Limits, Amicus/Voila Registered Z39.50 searching, Statistics, Borrower & Lender Workflow Overview, Multi-Login, Expired Requests and Need by (Expiry) Dates, Out-of-Province Requesting, Desktop Delivery, Search Widgets, and more as new features and fixes became available from Auto-Graphics.

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	On-going
Coordinate migration of the SHAREit software from commercial servers to SFU cloud hosting for optimization and sustainability	Complete
<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	Summer/Fall 2019
Rebrand OLOL service	Spring/Summer 2019
<i>System Optimisations and SHAREit Enhancements</i>	
Support libraries through the software transition to the re-coded version 6 of SHAREit	Spring/Summer 2019
Implement the identified recommended union database optimisations	Summer/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	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.

Public vs. Post-Secondary

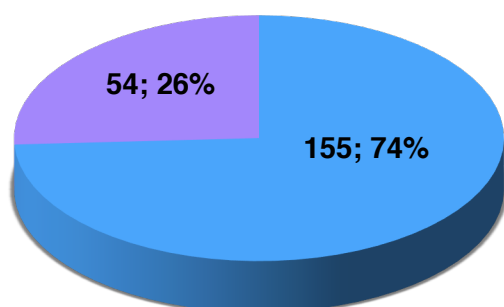
Category	Post-Secondary	Public
ERTI Request Issues	1	6
Holiday / Closures	4	4
ILL Requests	4	45
ISO	7	3
Lender List Issues & Policies	1	1
Live Shelf Status	3	14
Login / Access	4	3
Other	3	9
Other Bugs / Errors	1	9
Patron-Initiated ILL		10
Settings & Configuration	5	4
SHAREit Software Issues & Enhancement Requests	7	22
Statistics	1	5
Training		9
Union Database	2	2
Z-Target Set-Up & Issues	11	8
Total Support Cases	54	155

Public Library by Size

Small (< 40,000)	Large (> 40,000)	VPL	BVIL*
5	1		
2	1		1
2	6	1	36
		3	
	1		
5	9		
	1	1	1
3	6		
2	5	2	
5	2	2	1
2	2		
7	4	11	
2	2	2	
	5		4
	1	1	
	6	2	
35	52	25	43

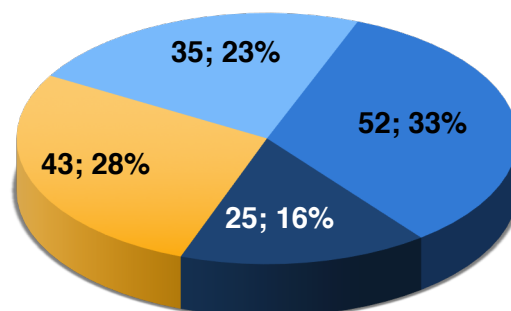
*This new category reflects the OLOL Admin Support Centre being contracted separately to provide brokering support for BC Public Libraries Branch (BVIL) to multiple Reading Centres.

By Institution Type



■ Public ■ Post-secondary

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 Request Issues	6	3	100%
Holiday / Closures	4	1.1	100%
ILL Requests	45	13	100%
ISO	3	1.25	100%
Lender List Issues & Policies	1	0.5	100%
Live Shelf Status	14	6.25	79%
Login / Access	3	0.85	100%
Other	9	2.75	100%
Other Bugs/Errors	9	3	100%
Patron-Initiated ILL	10	9.75	100%
Settings & Configuration	4	1.25	100%
SHAREit Software Issues & Enhancement Requests	22	12.5	77%
Statistics	6	3.75	67%
Training/Requests	9	13	100%
Union Database	2	1	100%
Z-Target Set-Up & Issues	8	6	100%

of Support Cases and Time Spent, by Category

