



OUTLOOK ONLINE

Actions &  
Achievements

2016



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Front cover:

Top right: Patron using OutLook OnLine at Surrey Public Library.

Bottom left: Justice Institute of BC Library.

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## FROM THE ADMINISTRATIVE CENTRE

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2016 was a year of growth for OutLook OnLine (OLOL) as the full benefits of the centralised Administrative Centre came to fruition. In November, the OLOL Support Centre distributed a survey to all 93 OLOL post-secondary and public libraries to assess how centralised support has made a difference. We heard that library staff are highly satisfied with the support they receive (97%) and that centralised support has allowed them to add efficiencies to their workflow and make better use of the software (82%).

The technical foundation laid in 2015, and built on throughout 2016, paved the way for a summer launch of privacy-compliant Patron-Initiated Interlibrary Loans (PI-ILLs). Public and post-secondary libraries across the province can now offer their patrons the ease of online interlibrary loan requesting while ensuring their personal information is protected on secure Canadian servers.

Surrey Public Library and North Island College Library recently launched PI-ILLs with the assistance of the OLOL Support Centre. In this year's *Actions & Achievements*, we meet staff at these two libraries to hear how OLOL facilitates interlibrary loans, allowing them to share their collections, bring patrons the resources they need, and now – with PI-ILLs – offer patrons the ability to request and track materials independently.

The SHAREit platform, the software that powers OutLook OnLine, continued to evolve as the vendor rolled out changes such as a new mobile interface, customisable patron request forms, and streamlined uploads to the union database. With centralised support, libraries incorporated changes into their workflows with minimal disruption.

We welcome your feedback on *OutLook OnLine Actions & Achievements 2016*, and we look forward to working with libraries to provide continued support and savings in the coming year!

**“When we do make contact with the Support Centre, they are anxious to ensure I have understood the problem and are happy to suggest ways to streamline the ILL process or to make fuller use of the program.”**

SALT SPRING ISLAND PUBLIC LIBRARY

**“So many of our students are comfortable in an online environment, and PI-ILLs seemed like the natural next step.”**

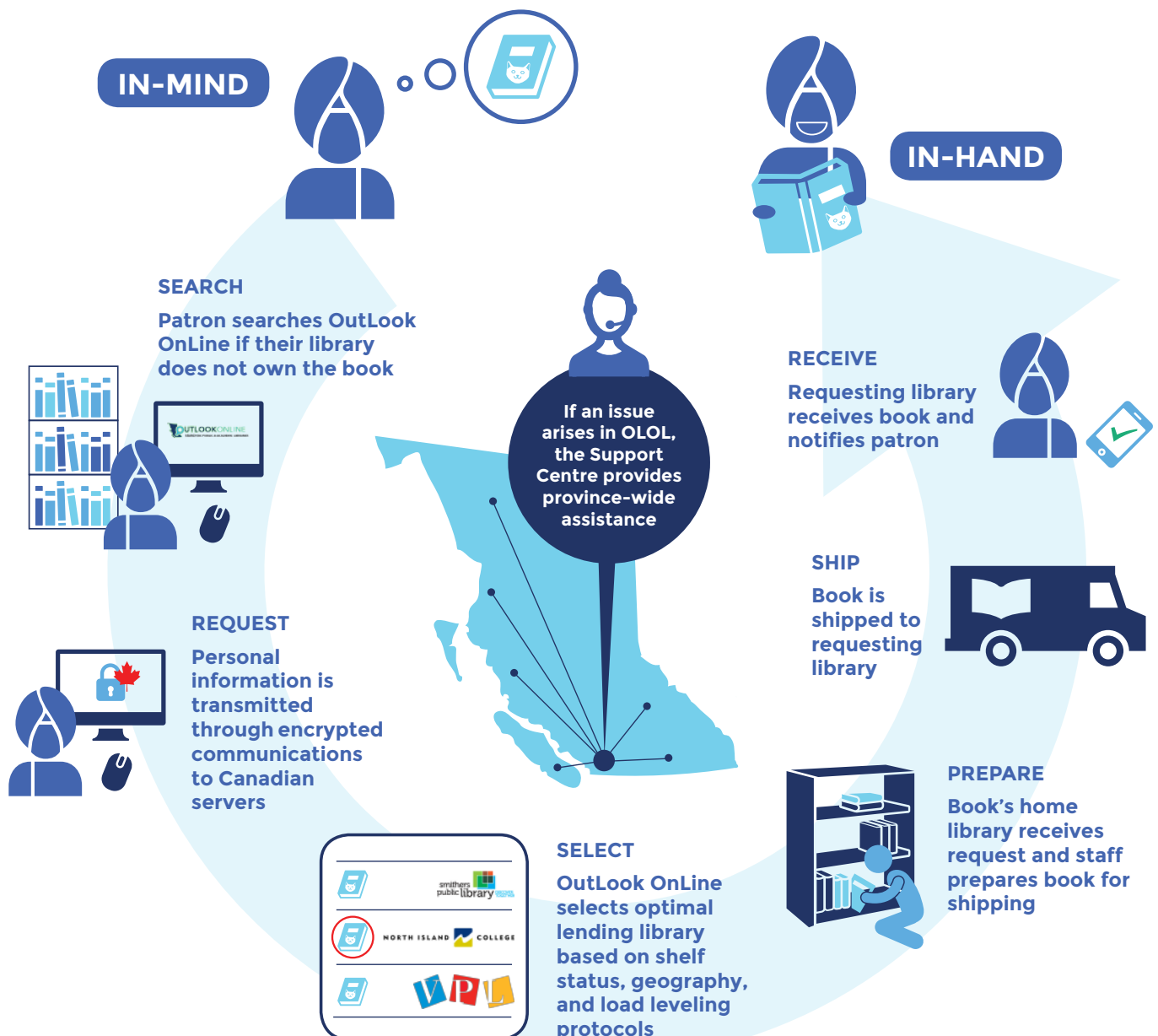
NORTH ISLAND COLLEGE LIBRARY

**“I love the new OutLook OnLine. I do more OutLook requests now because of this. The Support Centre is really on the ball.”**

LANGARA COLLEGE LIBRARY

# FROM IN-MIND TO IN-HAND

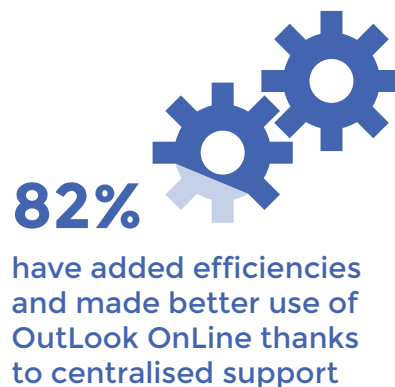
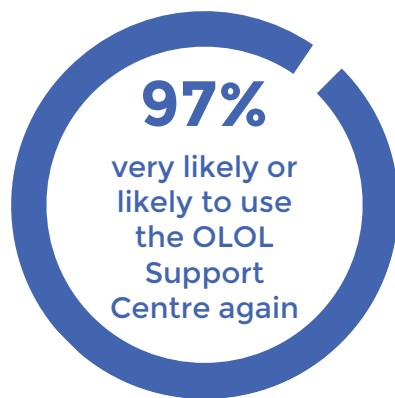
When a library patron in BC has a book in-mind not available at their home library, they rely on OutLook OnLine to securely request it from another library and efficiently receive the book in-hand.



# CUSTOMER SATISFACTION SURVEY

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All 93 OutLook OnLine (OLOL) libraries were surveyed to assess their satisfaction with the Support Centre and to learn how centralised support has made a difference.



What are the most important services that the Support Centre provides? (top 3)

Provide software support to ILL staff and administrators

Provide online and in-person training to ILL staff and admins

Maintain a responsive and proactive relationship with the vendor

“Vaughn is the absolute best and has gone out of her way to help me with anything and everything.”

CAMOSUN COLLEGE LIBRARY

“We are constantly impressed and amazed with the attentiveness, efficiency, and speed with which Vaughn provides support.”

SURREY PUBLIC LIBRARY

“Vaughn is awesome! She always responds to my questions quickly and clearly, a delight to correspond with via email or phone.”

SQUAMISH PUBLIC LIBRARY

“I have excellent support when needed.”

LANGARA COLLEGE LIBRARY

# OUTLOOK ONLINE AT NORTH ISLAND COLLEGE

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North Island College (NIC) serves over 8,500 learners in a geographic region of 80,000 square kilometres across northern Vancouver Island and the BC mainland coast from Desolation Sound to Klemtu. NIC offers degree programs including Associate Arts, Business, and Nursing as well as diploma, certificate, and career programs at four campuses, in Ucluelet, online, and through Distance Education.

As with most libraries interlibrary loans (ILLs) fill collection gaps, and NIC is no exception. "ILLs allow NIC students and faculty to access important resources that we may not have," says Katherine Percival, the Library Technician who mediates interlibrary loans for all four NIC campuses. Since NIC only requests ILLs in-province, the majority of their interlibrary loans are processed through Outlook OnLine (OLOL). "It's a really important service," says Mary Anne Guenther, Coordinator of Library Services, "the sourcing is reliable and it has many useful features for tracking." Katherine adds, "I like how I can search, request, and track materials all within one program. OLOL is very efficient."

## Launching Patron-Initiated Interlibrary Loans (PI-ILLs)

Recently, NIC launched Patron-Initiated Interlibrary Loans in OLOL. "So many of our students are comfortable in an online environment, and PI-ILLs seemed like the natural next step," says Mary Anne. "They can now request ILLs from home whereas previously they had to fill out an online form or visit the library in-person. We're now set-up and have started receiving our first requests." Before PI-ILLs were implemented, ILL requests were received at the campus where they were requested and then sent to Katherine to release. With PI-ILLs, that step has been bypassed and NIC experiences a reduced turnaround time, which benefits students and faculty who are waiting for materials, often on a tight timeline.

## Working with the Support Centre to fine-tune the software

Having four campuses presented additional challenges when implementing PI-ILLs, but the OLOL Support Centre supported NIC at every step of the way.

Beyond PI-ILLs, Katherine has worked closely with the OLOL Support Librarian Myfanwy (Vaughn) Postgate to optimise OLOL. "It's changed our use of OLOL dramatically," says Mary Anne. "Vaughn's level of support is amazing. I cannot praise her enough for the level of expertise and the confidence she's given us. She was so kind and patient, and we felt we had her dedicated attention." Mary Anne also appreciates the efficiencies the Administrative Centre delivers. "The centralised accounting, invoicing, and statistics collection saves our library time and money. We've come a long way since the early days of my career. I think OLOL is a very efficient and effective provincial service."



**"Patron-Initiated Interlibrary Loans give students the ability to search, locate, and request resources conveniently within a single interface."**

MARY ANNE GUENTHER

**"The OLOL Support Centre helped us see where we wanted to go with PI-ILLs and helped us get there."**

KATHERINE PERCIVAL

**"When we tell students and faculty that we can bring in items to support their research and education, they are so happy. And once they know about the interlibrary loans service, they really do use it."**

KATHERINE PERCIVAL

## FOCUSING ON VALUE

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OutLook OnLine (OLOL) delivers value to post-secondary and public libraries, library staff, and patrons across BC ...

**\$279,999**

OR **61%**

saved system-wide by collaboratively licensing the software that powers OLOL

**330+** HOURS

of troubleshooting provided by the Support Centre

Automatic load leveling across

**93** LIBRARIES

ensures no one site is burdened

**10** MILLION+

books, DVDs, music, and more at the fingertips of library patrons

As of June 2016,

**28%** LIBRARIES

achieved privacy-compliant Patron-Initiated Interlibrary Loans, empowering patrons to request items securely and independently

“Interlibrary loan use continues to increase and our launch of PI-ILLs in 2016 was greatly facilitated by the OLOL Support Centre.”

PENDER ISLAND PUBLIC LIBRARY

### VALUE SPOTLIGHT: NORTH ISLAND COLLEGE

**\$47,702**

saved through a centrally licensed, coordinated, and supported OutLook OnLine

**1,592** HOURS

saved by staff working together with Admin Centre support

**66%**

saved by licensing OLOL software consortially

**8,500** STUDENTS

benefit from access to provincial collections

**6** STAFF

benefit from expert support and training

# KEY ACHIEVEMENTS

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In 2016, OutLook OnLine (OLOL) was enhanced to improve patron experience and increase efficiencies for interlibrary loan workflows. The Admin Centre worked alongside library staff to provide essential support and troubleshooting.

## Service Enhancements

- Achieved privacy-compliant Patron-Initiated Interlibrary Loans (PI-ILLs) at 26 sites, ensuring patron information is secure while streamlining both patron experience and staff workflows
- Activated Live Shelf Status at six sites to increase request efficiency by determining the current status of an item before communicating the request to a potential lender library
- Launched a new mobile scalable interface re-design for the SHAREit software with guides, a demonstration video, and documentation
- Facilitated transition to a new web-based, secure ShareFile system for libraries to use when updating their OLOL union database records

## Library Staff Support & Outreach

- Leveraged expertise centralised at the Administrative Centre to provide support, troubleshooting, and training to 93 post-secondary and public libraries
- Distributed OLOL Support Centre Customer Satisfaction Survey to libraries, with a 56% response rate and a high satisfaction rate of 97%
- Responded to 587 OutLook OnLine support cases: 459 from public libraries and 128 from post-secondary libraries
- Presented to Public Library InterLINK Administrators' Advisory Group (AAG) and PI-ILL Working Group about OutLook OnLine enhancements and privacy-compliant interlibrary loans

**83,753**

interlibrary loan requests filled through OutLook OnLine

**26** SITES

achieved privacy-compliant Patron-Initiated Interlibrary Loans (PI-ILLs)

**587** SUPPORT CASES

submitted by libraries and resolved by the Administrative Centre

**“When I was unable to find a rare publication in the SFU catalogue, I tried a different approach with OutLook OnLine. OLOL is a useful way to check for publications in the province, in one place.**

**The publication turned up, in various libraries!”**

SIMON FRASER UNIVERSITY LIBRARY



# OUTLOOK ONLINE AT SURREY PUBLIC LIBRARY

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Cristina Teixeira is an Information Services Librarian at Surrey Public Library (SPL), where she oversees the Interlibrary Loans Department. “Interlibrary loans are important for our patrons because they fulfill a core service, which is to provide access to information, no matter what a patron wants.”

Cristina enjoys working with interlibrary loans because it provides an inside look into the collections of other libraries, what’s in-demand by patrons, and what might be missing from SPL’s collections. As a library selector of art books, Cristina feels a sense of pride when items she has chosen are requested by other libraries. “It’s a nice reminder that we’re serving patrons not only in our municipality but also all over the province – up north, in the interior, and in libraries that have smaller collections budgets. We love being able to supply them with our own materials. If our patrons aren’t using an item, then why not?”



## Offering patrons more independence through PI-ILLs

SPL processes thousands of interlibrary loans per year, and OutLook OnLine (OLOL) is the first place staff search. Along with several other libraries in the province, SPL recently soft-launched Patron-Initiated Interlibrary Loans (PI-ILLs) in OLOL, which allow patrons to submit and track interlibrary loan requests themselves. Prior to launching PI-ILLs, patrons at Surrey Public Library had to request ILLs through library staff, either by phone, via email, or in-person.

As patrons become more comfortable using library services in an online environment, PI-ILLs bring them into the fold. “We see PI-ILLs as an extension of the service provided by our online catalogue, which allows patrons to renew books or place holds on their own. Now, if a patron searches for a book in the SPL catalogue and there are no results, there is a link that encourages them to search other BC libraries. This link pops them into Surrey’s OLOL interface where they can see if the book is available elsewhere in BC and request it.”

## Receiving expert help from the OLOL Support Centre

As Surrey Public Library works through bugs and changes to the system, the OLOL Support Centre has saved them time and provided peace of mind. “The Support Centre has been a phenomenal service. Myfanwy (Vaughn) Postgate, the OLOL Support Librarian, came into the library personally and made some tweaks to help us set-up PI-ILLs. There is documentation available but having expert guidance saved us so much time. Vaughn has not only helped fix things but has also explained the context of how things work and what changes might be coming in the future. We really appreciate the support, and we hope it’s always there.”

**“We’re hoping Patron-Initiated Interlibrary Loans (PI-ILLs) will benefit patrons who are keen on having a little bit more independence.”**

CRISTINA TEIXEIRA

**“We’ve approached PI-ILLs with a lot less fear and intimidation knowing that we can ask questions at any point.”**

CRISTINA TEIXEIRA

# ON THE HORIZON

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## Looking forward to exciting changes in the coming year ...



### **Standardising Basic Training**

In the wake of the many significant changes to the SHAREit platform over the past two to three years, the Administrative Centre will roll-out a suite of standardised training sessions. Standardised training will ensure that interlibrary loans staff across the province have a common understanding of the OutLook OnLine platform and the ways in which it can be optimised to streamline staff workflows and patron requesting.



### **Exploring Unmediated Requesting**

Following Patron-Initiated Interlibrary Loans, the next logical step on the continuum of ILL requesting is unmediated patron requesting. Unmediated requesting bypasses the staff approval stage in the interlibrary loan process. This requires the implementation of a connector between a library's circulation system and SHAREit so that a patron's status can be checked before their request is approved. Significant system cost savings can be achieved by cost-sharing the development of a connector among libraries with common circulation systems. Once in place, unmediated patron requesting will save staff time.



### **Championing Database OpenURL Linking**

As BC's resource sharing landscape shifts, OutLook OnLine is playing an increasingly important role in providing a seamless user experience from citation to full text. Enhancements to the SHAREit platform will enable patrons to link directly from a citation in a database to an OutLook OnLine request form, where they can conveniently request a book or journal article via interlibrary loan.



### **Rebranding OutLook OnLine**

The time has come for a new look and feel! In consultation with partner libraries and stakeholders, the new year will initiate a rebranding campaign for OutLook OnLine. The new name and refreshed logo will better reflect OutLook OnLine as a unique service that enables public and post-secondary libraries across the province to share their collections with one another and, ultimately, with the people of BC.



## ESSENTIAL PARTNERS

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**OutLook OnLine would not be possible without the contribution of its essential partners, whose complementary mandates support different aspects of the shared service.**

### **Auto-Graphics, Inc.**

Since 1991, Auto-Graphics has had a long and successful history as the provider of BC's provincial interlibrary loan management system. This partnership has stood the test of time, from the earliest BC union catalogue produced on CD-ROM, through the transition to the online Agent platform, to the newest incarnation of the interlibrary loan management platform as SHAREit.

### **BC Electronic Library Network**

A partnership of BC's post-secondary libraries and the Ministry of Advanced Education, BC ELN develops, promotes, and maintains system-wide mechanisms that allow post-secondary libraries to meet the expanding information needs of the province's learners, educators, and researchers at the lowest possible cost. BC ELN hosts and staffs the OutLook OnLine Administrative Centre, providing support for both public and post-secondary libraries. The Administrative Centre negotiates and manages the license for the Auto-Graphics SHAREit platform and funds the post-secondary sector share of the platform costs.

### **BC Libraries Cooperative**

The BC Libraries Cooperative works to make it easier and more affordable for libraries to access the technology, ideas, content, and expertise they need to deliver services to users. The Co-op brings considerable expertise in building and maintaining library technical infrastructure to managing the Canadian hosting for OutLook OnLine.

### **Libraries Branch, Ministry of Education**

With a vision of seamless, high quality library service across the province, the Ministry of Education's Libraries Branch provides direction on provincial priorities and supports a number of essential library programs, including OutLook OnLine and its Administrative Centre. Libraries Branch funding ensures all BC public libraries have equitable, supported access to the OutLook OnLine service, regardless of size or location.

### **Public Library InterLINK**

A co-operative federation of 18 autonomous public libraries, InterLINK coordinates collaborative activities to support and benefit its members. In order to facilitate effective resource sharing, InterLINK stepped forward with pilot funding for Canadian hosting of OutLook OnLine, which was leveraged to benefit all BC libraries.

## 2016 AT A GLANCE

83,753 books, movies, music, and more were shared with public and post-secondary library patrons through OutLook OnLine.

26 sites implemented privacy-compliant Patron-Initiated Interlibrary Loans (PI-ILLs) to ensure patron information is protected and secure.

The OutLook OnLine Administrative Centre submitted 45 support tickets to the vendor to report fixes, ask troubleshooting questions, and request enhancements on behalf of libraries.

The OutLook OnLine Administrative Centre responded to 587 support cases to provide over 330 hours of troubleshooting to OLOL libraries.

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