# Instructions for OutLook OnLine/SHAREit Migration

# Version 2014-05-13



## Summary

The SHAREit software, which you may know as the OutLook OnLine union database and AGent ILL system, is migrating to a new version. The classic interface version we currently use is being turned off on June 30, 2014.

## Migration Checklist

These steps are described in detail on the following pages:

* Check the browser requirements on staff workstations
* Orientation to new search interface
* Find all the links (URLs and logos) which point to the old interface
* Configure book cover images (optional)
* Test! Test! Test!
* Customize interface settings (optional)

And then when you’re ready …

* Change over your links (URLS) to the new interface.

This document describes the steps necessary for the migration. When your library is ready to migrate, the main step you’ll do is change the URL(s) on your website to point to the new interface for SHAREit.

**Throughout this process, there should be no disruption of ILL requesting. All your existing data and requests should be available to work with in both the old and the new interface. If you update a request in one interface, your changes will be visible in the other.**

## Overview of the Changes

These are some of the improvements you’ll notice in the new system:

* a more attractive interface for users
* improved options for filtering and displaying search results
* greater ability to customize the interface for your users and for staff
* a switch to HTML 5 to improve device compatibility
* new branding and customization options

It’s important to note what hasn’t changed: the ILL management functions. You will continue to manage borrowing and lending activity with the same admin tabs (ILL Admin).

# Preparing for the Migration

#### 1. Check the Browser Requirements on Staff Workstations

The new interface works **best in current versions of Firefox and Chrome**. The patron-side search features work in IE and SAFARI but Firefox and Chrome are recommended. There are known problems in using staff and admin features in IE, particularly IE 8 and 9. Make sure your staff computer is equipped with a suitable browser.

One caution: the Canada Post shipping tool only works in IE 9. You may need to keep IE 9 for the shipping tool and use Firefox or Chrome for other ILL management activities.

#### 2. Orientation to New Search Interface

Orientation videos and other document are available on the Migration website:
<http://commons.bclibraries.ca/olol-migration/>

Please make sure you watch the main Orientation video.

Public service staff members who assist patrons/users with searching the interface and creating ILL requests should also watch the first part of the video to learn about new options in the search and results display.

#### 3. Find all the URLs which point to the Old Interface

Look around your library’s website and make a list of all the URLs which point to the current version. This might include links to the union database, to ILL request forms, and links for staff. Think about links from a discovery tool or Bibliocommons as well, and public links to the request form (if your library lets patrons place their own requests). You’ll need to update all these links as part of the migration.

Also make a list of any icons and buttons based on the old OutLook logo. You’ll need to swap those. New logos are available for download from the support page on the Commons page above.

For public libraries which use the LibPress CMSS/PLOT for their website, Libraries Branch will liaise with the BC Libraries Cooperative to ensure easier transition of new URLs and any icons and logos. Further information will be available on the Migration website soon.

#### 4. Configure Book Cover Images (optional)

If your library has a license with Syndetics or another company which supplies book cover images, SHAREit can be configured to display those images rather than the default covers from Amazon. Please contract Mari, Gordon, or Sunni to have this set up.

#### 5. Testing (Start now!)

Find the new URL (see below) and log into the new interface. The new system is live and you can use it right away for typical patron and staff activities. All of your settings, staff accounts, preferred search targets, etc. should have carried over into the new interface.

**The ILL request data you see is “live”. If you update the status of a request in the new interface, you are processing a real ILL request.**

Here are some suggested test activities**:**

* Access the public catalogue and try some searches.
* Log into the staff interface and confirm ILL transaction management is working.
* If your public service staff enter ILL requests for patrons, check their access and enter a test request.
* If you expose the SHAREit request form directly to patrons, check that it’s working.

Please contact Mari, Sunni, or Gordon to report any problems. Their contact information is at the bottom of this document.

#### 6. Customize Interface Settings (Optional)

Your interface has been pre-set with some system-wide defaults in order to ensure a consistent look and feel and branding. These defaults include the basic and advanced search screens, default results display, etc. We don’t think you’ll need to change these, but you may have some local preferences.

Be warned that we may need to push out updates to the system-wide default. If you’ve made local customizations, those may be over-written.

We can also offer limited support on customization. Please be prepared to review the manuals and then ask any questions you have.

## The Migration Itself: Change Over Your URLs

If you’ve followed the steps above, you’re ready to migrate. It’s pretty simple: change any URLs on your website or bookmarks so that they point to the new interface. Here’s the new URL:

[http://bcuc-agent.auto-graphics.com/mvc?cid=bcuc&lid=**XXXX**&reset=force](http://bcuc-agent.auto-graphics.com/mvc?cid=bcuc&lid=XXXX&reset=force)

Replace the XXXX with your SHAREit library code (BC Interlibrary loan code).

Note that there is no longer a separate URL for staff. Staff access the product with the same URL and then use the Login button in the top right corner of the screen.

## Supporting Documentation

Auto-Graphics has prepared documentation on the new interface at the URL below. They continue to roll out bug fixes to the new interface, and there may be a delay while the documentation catches up.

<http://www2.auto-graphics.com/techsupp/docdownload/doc_download.asp?AgentUserId=CAGENT&AgentPassword=AGEN24TP>

## Who is coordinating this project? Where do I get help?

There are three coordinators for this migration. Please contact the appropriate person for your category.

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| --- | --- | --- |
| Post-secondary libraries:Sunni NishimuraBC Electronic Library Networksunnin@eln.bc.ca778-782-6937 | Public libraries outside the lower mainland:Mari MartinLibraries Branchillsupport@bclibrary.ca  | InterLINK public libraries:Gordon ColemanBC Electronic Library Networkgordonc@eln.bc.ca604-616-9954 |