

## Customize Outlook Online Workshop Script Fall 2009

### **Slide 1: Cover slide**

Customize Outlook Online Workshop

### **Slide 2: Introduction- Romi**

Welcome to the Customize Outlook Online workshop presented by Anne Morgan Librarian supporting Outlook Online / Resource Sharing on behalf of PLSB and myself Romi Casper, Public Services Branch staff. We are both located in Victoria. This is a one hour workshop.

Introduce trainers and all attendees

Before we get started, here's what to do if you have any technical problems during the workshop:

- If you lose your Live Meeting connection for any reason, just sign back on again by going into the workshop email that we sent you and clicking on the blue text **Join the meeting**. Should you accidentally hang up your phone, just dial back into the conference call again using the toll free 866 number and conference participant ID number. Have a printed copy of the workshop email we sent you, so you have this information handy.
- You will follow our presentation by watching what's happening on our desktop. So you should see either our PowerPoint slides or the web sites at all times. Be sure to let us know if we are going too fast, or too slow, if you are having trouble hearing us, or if you would like us to go over something again – as we obviously can't see your body language or that puzzled look on your face!
- And please feel free to jump in at any time if you have a question or comment. If we're not able to answer your question right away, we will get back to you after the workshop.
- Also, if you can mute your phone, so that we do hear activities going on in your library that would be appreciated.

At the end of our demonstration we have developed a question set that reviews the topics we have covered today.

### **Slide 3: Agenda - Romi**

Our workshop today will focus on how to customize Outlook Online, for your staff and for your patrons.

During the workshop we are going to discuss how you can customize:

- ▶ Results page options
- ▶ My preferences options
- ▶ Search resources options
- ▶ Patron options
- ▶ Splash page options
- ▶ Request forms options
- ▶ Help options

We aren't going to take a formal break, since we should be finished with the demonstration part of the workshop in about an hour. Is that okay with everyone?

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### Slide 4: Results Page Options- Romi

The Outlook Online search results display page has changed in recent versions

- Email / Print / Save: applies only to titles displayed on current screen, not entire results
- Sort options for different searches: alpha by title is recommended default
- Download records for cataloguing: Add Cart, View Cart, Download, Empty List
- Create lists: Add to a List, View My Lists , Empty List, Print
- Left pane options (PAC Admin User Guide, Chapter 3)
  - Related terms: sometime automatic display
  - RSS feeds: relevant current news items related to search term(s)
  - Customize pane width: PAC Admin > Manage Search Settings
  - Customize left pane headings: PAC Admin > Manage Search Settings;  
General settings and detailed settings for RSS feeds

### Slide 5: My Preferences Options – Romi

Staff Menu > My Account > My Preferences

- View of resources for search types: Displayed or Hidden
  - Keyword, Browse, Advanced
- Searches to save in History: recommend 0 ; then in My Search History, click on Clear History to delete past searches
- Number of items in Brief Display Page: recommend 100
- Web links: add, then access from search resources page, not in federated searches
- Default Record Display Format – Labelled (list) or MARC ; (card option removed for BVIL)

### Slide 6: Search Resources Options - Anne

You can have search resources for 2 types of users – staff and patrons/guests. In BC we do not have authenticated patrons so everyone other than staff who login using a username / password is a patron / guest category.

- Staff – authenticated users – by username and password
- Patrons / guests – unauthenticated
- Select resources -- In PAC Admin > Select Search Resources, select a library> “Edit” button. A new screen opens and then allows you to select settings. Click on the settings you want and then “submit” and close.
- Select search indexes – in Pac Admin Search indexes may now be configured at the library level. Search indexes are index terms such a title, author but also GPO number and can be configured for different users and labels modified
- Default resources – this allows the resource to always be searched as a default, most public libraries only have the union catalogue selected but it is up to you
- Interlibrary loan resources that charge - ISO ILL – UBC, SFU; CISTI, UVIC and UNBC. Libraries in union catalogue do not charge for loans. If you search and request items using ISO ILL from UBC, SFU, UVIC McPherson and CISTI there are charges; you can search other Z resources – UVIC Priestly Law Library, UNBC and see the items but cannot submit request via Outlook Online. LAC does not charge. The Service Centre > Interlibrary Loan page has detailed information.

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### Slide 7: Patron Options- *Anne*

- Patron Initiated interlibrary loan
  - Mediated / unmediated – all public library have mediated patron ILL; over half of BC public libraries have patron initiated interlibrary loan.
  - ILL request tracking messages – in Patron Menu, select > ILL Request Tracking  
Some library's web sites have detailed instructions for patrons tracking, such as Vanderhoof Public Library, for example:
    1. You can check the status of any request that you have placed yourself using Outlook Online.
    2. On the Patron Menu select **ILL Request Tracking** from the box on the left hand side of the screen.
    3. A box will appear. Enter your name in the format "**Last Name, First Name**".
    4. Enter the password you used when you placed the request.  
e.g.: The last four (4) digits of your library card number.
    5. Click on the **Submit** button.
    6. A box will open with information similar to the listing below. The status field indicates what is happening with your request at present.
- Patron notifications messages – In ILL Admin > Maintain Participant Records > can have up to 5 ILL statuses with free text fields – this requires the patron's email address is included when interlibrary loan first placed
- ILL request form patron notice – ILL Admin allows for a locally-defined message or "disclaimer" note (displayed at the top of the forms) related to availability of items through ILL or other pertinent information.
- Remove blank request forms for patrons – contact Anne
- Changing patron My preferences – contact Anne
- ILL request limits – not available because BC does not have authenticated patrons

### Slide 8: Splash Page Options - *Anne*

A splash page was introduced in 2008. There is documentation about Splash Page in Outlook Online > Staff > documentation > Splash Page or in the Service Centre. There are 3 templates available and an increased choice of colours.

- ▶ 3 Templates and wide choice of colours
- ▶ Message of the day – this is free text and can be used to notify of ILL closures
  - Messages of the day
  - Instructional messages – how to do an advanced search
- Calendar events – add library events / notices
- Customize with Outlook Online logo – add the Outlook Online logo (from Service Centre) and have the background colour blue
- Customize RSS feeds – select your favourite RSS feed, e.g. CBC has a lot on their web site

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### **Slide 9: Request Form Options - Anne**

- ▶ Default forms
- ▶ Common forms for BC public libraries
- ▶ Local library defined forms
- ▶ History information - chronological listing of each step in the request either newest to oldest or oldest to most recent

### **Slide 10: Help Options - Anne**

- Auto-Graphics online help – for example let's take a look at the Help available on the "Splash Page" – click on "Help" button in upper right corner and a new window opens
- AGent News and Agent Documentation - details about the most recent changes and PDF of modules available from left hand menu on staff pages
- Service Center –OutLook Online User Guides – copies of all Auto-Graphics documentation is posted; here are the specific page links
- If you experience problems or have questions about Outlook Online Contact either Anne Morgan by email [anne.morgan@bclibrary.ca](mailto:anne.morgan@bclibrary.ca) or 1-250-595-4845 or Romi Casper by email [romi.casper@gov.bc.ca](mailto:romi.casper@gov.bc.ca) or toll free 1-800-663-7051

### **Slide 11: Anne**

- ▶ Questions?
- ▶ Evaluation Form - We will be emailing you an online evaluation form. If you could complete it and forward to anyone who attended but did not have individual invitation.
- ▶ Thank you for attending today's session!

If there is time, we would like to go over a few questions about what we covered in today's webinar. These questions are posted as Practice Exercises under Workshop materials on the workshop page, along with the copy of the PowerPoint.