

Illume: Best Practices for SHAREit Libraries

Background: At the December 2019 All Partner Meeting (APM), BC ELN Partner Libraries brought a recommendation forward to the Steering Committee that [ILL transaction fees for non-returnable items should be eliminated](#) within the BC ELN consortium, with the understanding that identified considerations will be addressed through [Benefits & Responsibilities](#) and **Best Practices** documentation.

Purpose: To increase the efficiency of the Illume system through best practices that clarify which software settings & optimisations and workflows allow the system to equitably load-balance requests optimally across the BC ELN resource sharing system. *This document is intended to be a living document that may undergo updates after the initial 2021 assessment year is complete.*

Preferred Lender Lists:

Academic SHAREit libraries should optimise their SHAREit **Preferred Lender List** for post-secondary **Copy** requesting, rather than **Loan** requesting based on the following recommendations:

- Academic **Copy Preferred Lender Lists** are organized from smallest to largest library, regardless of geography or institution-type, with post-secondary lending institutions prioritized before public library lenders.
- Recommended **Copy Preferred Lender Lists** are provided to post-secondary institutions via the Illume Support website here: <https://illumebc.ca/guides/preferred-lender-lists>

Participant Record Configuration:

Academic SHAREit libraries should optimise their **Participant Record** configuration settings to allow libraries to predict a consistent complete Turnaround Time for all requests from Pending to Shipped to Check In, without requests languishing or moving automatically to categories like Not Received or Overdue unexpectedly.

- Academic SHAREit libraries should optimise their **Participant Record** configuration settings, such as *Days to Respond*, based on the following recommendations:
 - **Total Time Request Pending** - A library should configure their SHAREit **Days to Respond** (eg. 4) and **Days Open** (eg. 5 days a week open) so **Pending** requests do not remain too long at one library before moving on to additional Lenders.

For SHAREit libraries this should equal at most **one (1) real business week** in Lender > Pending (calculation: 5 days open x 5 days to respond = 1 real business week). *Please contact the [Illume Support Centre](#) if you'd like assistance calculating your Total Time Request Pending.* **Please Note:** SHAREit libraries can

move requests to Will Supply/In Process to allow for additional processing if necessary, but should check the **SHAREit Request Manager Workflow** section for further guidelines on total processing time.

- **Days to Supply** - Libraries should configure their Days to Supply to **21 days**. This allows the software to automatically change the status of requests to **Not Received** at 3 weeks after a request is marked Shipped, so libraries can consistently investigate shipping delays.
- **Days to Return** - Libraries should set their Days to Return to a minimum of **42 days** so that Shipped requests do not move to Overdue before they can be Received. This allows libraries to accommodate the expected normal interlibrary loan period of 1.5 weeks to deliver/ship; 2-3 weeks on loan and 1.5 weeks return shipment. **Please Note:** If a library makes use of a Lending Policy they should set their “Loan Period” setting (aka the Days to Return) to zero (0) so the system makes use of their Participant Record setting instead. Check-out our [Lending Policy](#) guide for more information.
- **SHAREit libraries** should also always make use of the [Holiday List](#) to indicate when they are closed for extended periods (greater than 1 week). As the system automatically skips closed libraries, this helps route requests faster to other libraries without languishing at unstaffed libraries.

SHAREit Request Manager Workflow:

ILL Staff should create, edit & process all provincial partner requests within their **SHAREit Request Manager**, including those sent to ISO lender libraries (eg. UVic). Any **Borrower requests** that aren't routed through the Illume service, may be subject to fees by the lender library. For example, if a SHAREit borrower library requests directly from a Relais lender library via email or web portal.

- **Borrower Request Creation** – ILL Staff and/or Patrons should create all provincial borrower requests directly in Illume according to the following recommendations:
 - ILL Staff should first try requesting from an existing **Union Database (UDB)** or **Z39.50 target record** with a preferred automatic lender list build before creating a blank request to target a specific last resort lender.
 - When requests are created they should always make use of the [ERTI automatic Smart-build](#) that uses **Preferred** and **System-wide Lender Lists** optimised for load-balancing requests across the system. ILL Staff should not manually update the automatic **Lender List** field created using the automatic optimised load-leveling.
 - **Blank requests** should only be created using the SHAREit Blank Request Form, after contacting the desired lender library, when it's necessary to bypass lender policies (eg. for print disabled) or erroneous live shelf checks.

- SHAREit ILL Staff should make use of the [ILL Review](#) feature to update borrower request record details and rebuild ERTI automatic smart-builds. This allows the software to apply the **Preferred** and **System-wide Lender Lists** optimised for load-balancing requests and also allows patrons to continue to make use of features such as Patron Tracking on patron-created requests.
- If possible, **SHAREit libraries** should make use of the lender [Desktop Delivery](#) feature to deliver **Non-returnable (Copy)** requests, such as a PDF articles, directly to borrower ILL Staff or Patrons within Illume. For patrons, this means they will frequently receive their document faster as it becomes available to them in Patron Tracking when the lender library marks the request as shipped. **Please Note:** ISO Libraries cannot receive these Illume attached documents and SHAREit libraries must deliver their documents separately (eg. via email).
- If possible, when **SHAREit ILL Staff** move a request to **Will Supply/In Process**, they should within **one (1) real week** mark the item as Shipped or reject the request so it moves on to other lenders. The only exception to this best practice is if your institution is the *only* Lender *OR* last resort lender for an item.

SHAREit Software Optimisations:

If possible, **SHAREit libraries**, with assistance from the Illume Administrative Support Centre, should set-up Illume software optimisations to streamline requesting and improve workflow to save staff time based on the following recommendations:

- SHAREit libraries should set-up and activate a [system Lender Policy](#) to allow for the automatic deflection of material formats (eg. Audio CDs) that they do not provide.
- SHAREit libraries should set-up and activate [Live Shelf availability checking](#) to allow ILL Staff to focus on requests for items that are actually available. For Borrowers this means your patrons receive items faster as they're routed directly to Lenders that do have the items available without sitting in someone's Pending waiting to be rejected. And for Lenders this means ILL Staff won't have to waste time looking up most Checked Out or unavailable items and rejecting requests.
- If possible, SHAREit Libraries should also set-up [Patron-initiated Interlibrary Loan](#) requesting to allow patrons to search and create requests themselves as this has been shown to save Staff data entry time and speed-up request approvals.
 - Libraries with PI-ILLs should set-up a [system Borrowing Policy](#) to automatically show or hide the “Request this Item” button on appropriate material formats. For example, if a library does not allow Patrons to request DVDs the request button should be hidden on this format to save staff cancellation & communication time.

- Additional PI-ILL optimisations are also recommended including Patron Tracking, Patron Email Notifications, Patron Minimum Need-by Dates, and Guest Request Limits to reduce ILL Staff cancellations and communications/notifications. Please contact the [Illume Support Centre](#) for assistance with set-up.

Union Database Updates:

Our provincial Resource Sharing system relies on the integrity and accuracy of our tools. Libraries should upload record submissions to the union catalogues regularly, to maintain the integrity and accuracy of the union databases. Lack of regular record submissions may result in increasing interlibrary loan request errors that are directly related to out-dated records and irregular uploads to the union databases. Libraries should follow the following best practice recommendations:

- Participating libraries should perform a **full strip and reload** of their union database records **at least once a year**, and more frequent monthly submissions are recommended.
- Libraries should **submit their records** to Auto-Graphics according to the instructions located here: <https://illumebc.ca/union-databases/post-secondary-procedures>
- When notified of **record submission errors** by the Illume Support Centre or Auto-Graphics, libraries should make use of the [Auto-Graphics Diagnostics tools](#) to review the records that failed during submission and make corrections so they can be resubmitted for inclusion in the UDBs. *Auto-Graphics is available for assistance with recommendations for correcting errors.*
- When submitting to the BC ELN Serials & Media UDBS, libraries should extract records from their ILS based on recommended [UDB best practices](#).

Please [contact us](#) if you have any questions, feedback, or concerns about the Best Practices.