

The following report includes Illume Administrative Support Centre progress & activities from January 1 to June 30, 2023, main activities for 2023, and a support case analysis.

### COVID-19 Pandemic Response

- Continued to support libraries through the **COVID-19** pandemic:
  - The support centre announced the retirement of pandemic practices for SHAREit, such as the consortial Days to Delete setting, and requested feedback as libraries have mostly retired their pandemic workflows. As the feedback was overwhelmingly positive, SHAREit consortial settings were returned to their pre-pandemic configuration at the end of January 2023.

### Support for Existing SHAREit Software Functionality

- Responded to and managed **263** support cases from public & post-secondary libraries, including brokerage support for multiple public Reading Centres. Questions were predominantly related to BVIL Brokering, SHAREit Software Issues/Bugs and Enhancements/Features, ILL Request Support, Patron-initiated ILLs, and Software Settings/Configuration.
- Opened **12 Auto-Graphics (A-G) Helpdesk tickets** via email or telephone, on a variety of issues related to the V6 SHAREit software issues/bugs, network issues, live shelf status checks, union database issues, and server updates.
- Negotiated a new 5-year Auto-Graphics SHAREit license and hosting support agreement for April 2023 to March 2028. Annual increases were maintained at 2% and negotiation also included long desired features at no cost, such as free set-up of SIP2/NCIP and LDAP or SSO for every library in our consortia. Also includes low annual vendor support fees per activated library/system for features like SIP2/NCIP.
- Completed an investigation of options available from Auto-Graphics and SFU IT to resolve SPF Record issues with Patron Notices from SHAREit. The support centre created a generic patron notice email address and offered it to multiple libraries for testing prior to making it available to all libraries in the fall.
- **Union Databases (UDBs):**
  - Assisted multiple libraries with trouble-shooting their record submissions with Auto-Graphics including *Burnaby Public Library* (BB), the *Justice Institute of BC* (BVAJI) and *Okanagan Regional Library* (BKO).
  - Continued investigating options for including eJournal records on behalf of BC ELN academic libraries to improve post-secondary Non-returnable (copy) load leveling.
- **Live Shelf Status (LSS):**
  - Worked closely with the *Justice Institute of BC* (BVAJI) to set-up, trouble-shoot and launch their Live Shelf Status availability checking feature.
  - Assisted multiple libraries, including the *Vancouver Island Regional Library* (BNVI) and *Sechelt Public Library* (BSE) with troubleshooting live shelf status errors or issues.
  - Worked with Auto-Graphics to test multiple applied software fixes for the “Presuming available” live shelf status software defect impacting availability checks for Hybrid (UDB & Z39.50) SHAREit

customers. This issue was finally resolved on the evening of February 28<sup>th</sup> 2023. Auto-Graphics also implemented software checks to hopefully stop this issue from ever re-occurring.

- **ISO Support:**

- Assisted multiple ISO-target libraries, including the *University of British Columbia (BVAU)*, *University of the Fraser Valley (BCLF)*, and *Simon Fraser University (BVAS)* with troubleshooting of SHAREit-Relais related issues.
- Assisted multiple SHAREit libraries with troubleshooting and managing ISO-target ILL requests, including the *Thompson Nicola Regional District Library (BKCT)*, *New Westminster Public Library (BNW)*, and *Greater Victoria Public Library (BVI)*.
- Communicated with *Vancouver Island University (BNM)* regarding set-up of as a Relais ISO-target library with SHAREit. *Set-up currently waived at request of the BC ELN member.*
- Completed follow-up and troubleshooting with the *University of Victoria (BVIV)* for remaining issues related to their transition from a local Relais configuration to OCLC hosted site.
- Investigated and requested information and updates to SHAREit automatic Lender Policies with regards to requests from borrower ISO-Target libraries.

- **Z3950 Support:**

- Configured, mapped and managed updates to Z39.50 Search Targets for multiple libraries, including *Coast Mountain College (BTEN)*, the *Justice Institute of BC (BVAJI)*, and *Squamish Public Library (BSQ)*.
- A total of **41** public & post-secondary participating & partner libraries have Z-targets activated.

## Communications, Training & Marketing

- Enhanced the **Illume Admin Centre support website** with new and updated communications. Created and updated 7 guides, 6 FAQs, semi-annual reports and multiple News notices of software/server updates & downtime and more: <https://illumebc.ca/>
- Communicated new features, such as the highly requested **Internal Staff Notes** feature, via the public & post-secondary interlibrary loan listservs.
- Updated guides with changes related to existing features, such as Permanent Patron Accounts, Search Targets/Resources and Z39.50 Records, and Desktop Delivery, and communicated as appropriate.
- Communicated ongoing and resolved bugs/issues with the SHAREit V6 software and maintained a **V6 Migration Known Bugs or Issues** page: <https://illumebc.ca/v6-known-bugs-or-issues>
- Coordinated and communicated with Public Libraries Branch to assess Public library load and workflow, including a 5-year review of Public Library Turnaround Borrower & Lender statistics from 2018 to 2022.
- **Training (Individual & Group):**
  - Provided multiple training sessions via webinar, email or telephone on a wide-variety of topics including Request Workflow, Patron-initiated Interlibrary Loan requesting, ISO configuration & issues, Z39.50 configuration, Search Targets/Resources, SIP2/NCIP, Live Shelf Status, Statistics, and more.
- **Bringing BC ELN Associate Members into the Illume interlibrary Loan system:**
  - Worked closely with associate member *Alexander College (BBAC)*, on their Illume Participation Plan including SHAREit configuration & set-up, local ILL Policy, UDB Records, Staff Workflow, and more. They are estimated to join Illume within the Fall 2023 term.
- Issued the July - December 2022 Illume Administrative Centre Progress Report: <https://illumebc.ca/about-us/reports/progress>

- Issued the 2022 Illume Action & Achievements Report: <https://bceln.ca/about/bceln-reports/actions-achievements>
- Attended A-G User Group Quarterly meetings to provide BCUC feedback and Enhancement suggestions to the vendor Auto-Graphics and other consortia & library systems using the SHAREit software.

### Optimisations and New SHAREit Features

- Completed a 5-year analysis of all Library **Turnaround statistics** to assess workflow of both public & post-secondary libraries, in order to recommend optimizations and features to assist libraries with their Staff workload.
- Assessed updating load-leveling for public library lending to both other public libraries and post-secondary libraries, in consultation and coordination with Public Libraries Branch.
- Explored **SIP2/NCIP** set-up with multiple high-volume patron-initiated and net borrower libraries including the *Greater Victoria Public Library* (BVI).
- Worked closely with vendors Auto-Graphic and EBSCO to create, test and troubleshoot an upcoming new **OpenILL** feature which allows patrons to submit pre-populated ILL requests, containing bibliographic data, from external 3<sup>rd</sup> party vendors or library web forms. Provided feedback to Auto-Graphics to enhance the feature to be used effectively with Non-returnable (Copy) requesting from discovery layers and database resources.
- Assisted multiple libraries, including *Greater Victoria Public Library* (BVI) and *Salt Spring Island Public Library* (BGSIL), with set-up and configuration of the highly requested **Internal Staff Notes** feature.
- Provided support, training and troubleshooting to multiple libraries activating & updating their Patron-initiated Interlibrary Loans, including *Okanagan College* (BKOC) and *Richmond Public Library* (BRIZ).
- Worked with A-G and SFU IT to coordinate necessary updates, upgrades and troubleshooting of the V6 SHAREit software and servers including network connection issues and firewall updates.
- Submitted multiple enhancement & optimization requests, suggested by our member libraries or Illume Support, for the SHAREit software.
- Provided feedback and suggestions to the vendor Auto-Graphics on new, existing and in-progress Enhancements & Features including Cancel Shipped Requests, Cover Jacket Art, Pickup Locations, Automatic Retries, OpenILL, Permanent Patron Accounts and Desktop Delivery.

### Main Activities for 2023

- Launch the addition of new Illume participating member, BC ELN associate member *Alexander College* (BBAC).
- Announce the finalized OpenILL feature to post-secondary and public libraries desiring 3<sup>rd</sup> party integration of pre-populated SHAREit requests and assist interested libraries with set-up.
- Provide group and individual training sessions to libraries interested in implementing software optimizations and workflow improvements, related to the outcomes from the 5-year public & post-secondary library turnaround statistical analysis.
- Support Public Libraries with the development and publishing of ILL Policy pages. Guide and template available here: <https://illumebc.ca/guides/public-ill-policy-template>

## Support Case Analysis

### Support Cases, by Category and Institution Type

Below are the total support cases by category and institution type. Public libraries\* are further broken down into small (serving populations under 40,000) and large (populations over 40,000) libraries. The usually larger volume of cases from Reading Centre (BVIL) brokering & troubleshooting have also been pulled out to provide more accurate numbers for the rest of the province. \*Public library questions below included 91.25 hours of library-specific support time.

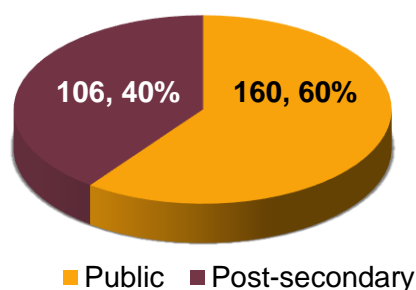
Public vs. Post-Secondary

Category	Post-Secondary	Public
BVIL Brokering	-	63
ERTI Smart-build	1	-
Holidays or Closures	1	2
ILL Request Support	19	12
ISO Issues	10	4
Lender Policies	1	3
Live Shelf Status/Checks	5	4
Login & Access	1	2
NCIP	-	5
Network or Server Issues*	2	1
Other	8	5
Other Bugs or Errors	4	7
Patron-Initiated ILLs	7	9
Search Resources/Targets	3	1
Settings Configuration	5	10
SHAREit Enhancements/Features	-	7
SHAREit Software Issues & Bugs	6	13
Statistics Support	4	1
Training Support	23	4
Union Database	3	5
UX Customisation	2	1
Z-Target Set-Up & Issues	1	1
<b>Total Support Cases</b>	<b>106</b>	<b>160</b>

Public Library by Size

Small (< 40,000)	Large (> 40,000)	BVIL
-	-	63
-	-	-
-	2	-
7	5	-
-	4	-
3	-	-
3	1	-
-	2	-
-	5	-
-	1	-
2	3	-
-	7	-
1	8	-
-	1	-
2	8	-
2	5	-
6	7	-
-	1	-
-	4	-
2	3	-
-	1	-
-	1	-
<b>28</b>	<b>69</b>	<b>63</b>

By Institution Type



By Public Library Size

