

Illume: Best Practices for ISO-Target 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 & optimizations 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.*

SHAREit Participant Record Configuration:

Academic ISO-target libraries should optimize their **Participant Record** configuration settings *within SHAREit* 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 in SHAREit.

- Academic ISO-target libraries should optimize their **Participant Record** configuration settings, such as *Days to Respond*, based on the following recommendations:
 - **Total Time Request Pending** – An ISO-target library should configure their SHAREit **Days to Respond** (eg. 7 or 10) and **Days Open** (eg. 5 days a week open) so **Pending** requests do not accidentally expire out of Lender Pending before they can be marked as Shipped. But also, so they do not remain too long at their library (eg. 4 real weeks) before moving on to additional Lenders.

For ISO-target (eg. Relais) libraries this should equal a maximum of approximately 1.5 to 2 real weeks (7 to 10 business days) in Lender > Pending (calculation: 5 days open x 10 days to respond = 2 real weeks). *This calculation will depend on staffing and average turnaround time for that ISO-target library; please contact the [Illume Support Centre](#) if you'd like assistance calculating your Total Time Request Pending in SHAREit.*

- **Days to Supply:** ISO-target libraries should configure their Days to Supply to **21 days**. This allows the SHAREit 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:** ISO-target 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 in SHAREit. 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 SHAREit 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 or contact the Illume Support Centre for more information or assistance.*

- **ISO-target libraries** should also make use of the SHAREit [Holiday List](#) to indicate when they are closed for extended periods (greater than 1 week). As the SHAREit system automatically skips closed libraries, this helps route requests faster to other libraries without languishing at unstaffed libraries. *If you’d like assistance adding or editing your Holiday List dates within SHAREit please contact the [Illume Support Centre](#).*

ISO-Target Request Manager Workflow:

ILL Staff within their **primary ILL software** (eg. Relais) should route requests through Illume using the ISO communication script/bridge in order to be eligible for the BC ELN elimination of fees. Any requests that aren’t routed through the Illume service, may be subject to fees by the lender library *unless covered by another resource sharing agreement such as [COPPUL](#)*. For example, if an ISO-target library (eg. KPU) requests directly from a SHAREit lender library (eg. Langara College) via email.

- **Borrower Request Creation** – ILL Staff *to the best of their abilities* within their primary ILL software (eg. Relais) should create and update borrower requests for SHAREit libraries according to the following recommendations:
 - ISO-target libraries should add the [BCUC Z39.50 target](#) as one of their searchable catalogues (eg. as a priority search target) in order to search and request from records/holdings uploaded to the shared Illume *BC Union Catalogue* union database.
 - When adding Lender Codes to a **Non-returnable (Copy)** borrower request, ISO-target ILL Staff *to the best of their abilities* using their primary software (eg. Relais) should *try* to optimize their lender list based on BC ELN Copy Preferred Lender List recommendations.

Academic **Copy Preferred Lender Lists** are organized from **smallest to largest library**, regardless of geography or institution-type (eg. University versus College), with post-secondary lending institutions prioritized before public library lenders. Please contact the [Illume Support Centre](#) for assistance or check-out the recommended **Copy Preferred Lender Lists** provided to post-secondary institutions via the Illume Support website: <https://illumebc.ca/guides/preferred-lender-lists>

- If possible, **ISO-target ILL Staff** should mark a request as **Shipped** within **one (1) real week** 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, **ISO-target libraries**, with assistance from the Illume Administrative Support Centre, should set-up Illume software optimizations *available in SHAREit* to streamline requesting and improve workflow to save staff time based on the following recommendations:

- ISO-target libraries should set-up and activate a [system Lender Policy in SHAREit](#) to allow for the automatic deflection of material formats (eg. Audio CDs) that they do not provide. This saves ILL Staff time as it allows the SHAREit system to automatically skip the primary ILL management software (eg. Relais) ISO-target for unavailable formats.
- If possible, ISO-target libraries should set-up and activate [Live Shelf availability checking](#) within SHAREit to allow ILL Staff to focus on requests for items that are actually available.

For Lenders this means ILL Staff won't have to waste time looking up most Checked Out or unavailable items (eg. Reference materials) and rejecting requests within their primary ILL software management system (eg. Relais) as SHAREit requests will skip you if the item is unavailable. This also allows Borrowers to 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.

Union Database Updates:

Our provincial Resource Sharing system relies on the integrity and accuracy of our tools. Participant 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, participant 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 UDDBS. *Auto-Graphics is available for assistance with recommendations for correcting errors.*

Please [contact us](#) if you have any questions, feedback, or concerns about the Best Practices or if you would like assistance with configuration of settings, such as your Holiday List, within SHAREit.