Illume Administrative Centre
Progress Report
January 1 – June 30, 2025

The following report includes Illume Administrative Support Centre progress & activities from January 1 to June 30, 2025, main activities for 2025, and a support case analysis.

Support for Existing SHAREit Software Functionality

- Responded to and managed **377** support cases from public & post-secondary libraries, including brokerage support for public Reading Centres. Questions were predominantly related to NCIP/SSO or automated authentication set-up/configuration, BVIL Brokering, SHAREit Software Issues & Bugs, Patron-initiated ILLs, ILL Request Support, ERTI Smart-build, and SHAREit Enhancements/ Features.
- **Auto-Graphics Support Tickets:**
  - Opened **39 Auto-Graphics (A-G) Helpdesk tickets** on a variety of questions or issues related to the software including Server Migration/Upgrades, NCIP or automated patron authentication, and SHAREit bugs/issues or new features.
  - Continue to see a large increase in Auto-Graphics bug tickets related to bug issues or feature feedback by our member libraries. Member libraries submitted **52 support questions/tickets** (14% of all tickets) related to issues with **SHAREit Enhancements/Features** or **Software Issues & Bugs**.
  - Requested updates on important ongoing issues and feature feedback at monthly vendor meetings with the Head of A-G Customer Support. These include Form field issues with the required/ mandatory status of fields (including Pickup Location & Patron's Library Card Number), Non-returnable (Copy) form bugs, ERTI smart-build issues, and the "My Library Owns" bugs.
  - Discovered a serious bug where requests submitted by Patrons/Staff were going straight to **Unfilled** even though they weren't Approved yet, rather than being sent to the Awaiting Approval category if no lenders were found during the ERTI smart-build.
  - Discovered a serious bug with **ERTI smart-builds** where the lender list build was failing to pull in valid lenders when the UDB record did not have a numeric identifier such as an ISBN. This issue was significantly impacting requests created from brief records such as Book Club sets. Submitted to the vendor Auto-Graphics for Development to resolve.
  - Continued to stress the importance of the issue with **Configure Request Forms**, where libraries were unable to update the status of any field to **Required/Mandatory** including Patron's Barcode fields. Worked closely with the vendor to apply a back-end database update to libraries/sites most impacted by this issue, in order to make these important fields mandatory temporarily. Continued to stress the importance of a long-term permanent fix at monthly Auto-Graphics meetings.
- **Integration Support:**
  - Assisted multiple **ISO-target** sites, including the *British Columbia Institute of Technology* (BBIT), *Trinity Western University* (BLTW), and the *University of Victoria* (BVIV) with troubleshooting of their SHAREit ISO communications.
  - Assisted the *University of Victoria* (BVIV) and *Trinity Western University* (BLTW) with questions about Ex Libris Alma integration with SHAREit. Requested documentation and assistance from the vendor Auto-Graphics for Alma interested libraries.
  - Continued to communicate with Auto-Graphics on upcoming updates to ISO 18626 availability and OCLC API availability for interested Relais and Tipasa libraries.

- **Live Shelf Status (LSS):**
  - Worked with the vendor Auto-Graphics to provide feedback on ERTI smart-build changes impacting live shelf status checks. SHAREit now prioritizes using Z39.50 targets for automatic lender list builds even if a library only added their target for Search or Live Shelf Status Checks. *When live shelf checks temporarily fail this now cascades into ERTI smart-build failures for that library as well.*
  - Investigated a bug for SirsiDynix libraries (eg. Horizon or Symphony) where requests for items that have multiple copies were being rejected when 1 copy was Unavailable (eg. Checked Out), even if multiple other copies of the item were Available. Worked with the vendor Auto-Graphics to outline the issue for development of a bug fix.
  - Assisted multiple libraries, including *Kwantlen Public Library* (BSKC), *Port Moody Public Library* (BPMP), and *Vancouver Public Library* (BVA) with Live Shelf Status issues and troubleshooting to resolve firewall/access issues or connection problems.
- **Union Databases (UDBs):**
  - Assisted multiple libraries with trouble-shooting UDB record submissions including *Kwantlen Polytechnic University* (BSKC), *North Vancouver District Public Library* (BNVD), *University of Northern British Columbia* (BPGU) and *Thompson Rivers University* (BKCC).
- **Z3950 Support:**
  - Worked with Auto-Graphics to test work-arounds for Z39.50 targets and ERTI smart-build problems resulting from updates to the feature to prioritize live Z-target results rather than UDB holdings when building automatic lender lists.
  - Provided feedback on recent changes recommending that consortial Z39.50 settings/options be updated to allow customers to prioritize UDB record holdings for ERTI smart-builds rather than default to using live Z39.50 targets. Many libraries may not want their Z39.50 target contacted with every SHAREit live lender list build.
  - Re-configured and updated all Search Only and Live Shelf Status Z39.50 targets with work-arounds, so Search Only z-targets would use the "BC Union Catalogue" union database holdings for ERTI smart-builds instead.
  - Removed live shelf status Location and Status mapping temporarily for libraries, including *Kwantlen Polytechnic University* (BSKC) and *Port Moody Public Library* (BPMP), that currently have non-functional Z39.50 targets after ILS migrations, as they were being dropped from the ERTI builds.
  - Continued to work with the vendor for solutions to Search Only partner libraries S*imon Fraser University* (BVAS), the *University of British Columbia* (BVAU), and the *University of Victoria* (BVIV), that are sometimes erroneously dropped from the ERTI smart-build due to live Z-target record/connection issues.
  - A total of **46** public & post-secondary participating & partner libraries have Z-targets activated.

Communications, Training & Marketing

- Enhanced the **Illume Support website** with new and updated communications. Created and updated 4 guides, 8 FAQs, semi-annual reports and multiple News, such as software updates: https://illumebc.ca/
- Updated **guides** with changes related to existing features, such as ERTI Smart-builds lender list load leveling, Lender Pending Calculations, and OpenILL, 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

- Continued to coordinate with the vendor Auto-Graphics and SFU IT on the May 12th **SHAREit server migration** to implement technical and infrastructure improvements. Created a test server plan and worked closely with the vendor to thoroughly test every portion of the new SHAREit server in order to achieve a seamless migration with very little down-time.
- Widely communicated the server migration on May 12th and successfully completed a seamless swap from the old server infrastructure to the new servers with the assistance of Auto-Graphics and SFU IT. All user accounts, requests and patron data successfully migrated from 7am to 10am and testing of all systems wass performed from 10am to 2pm, including ISO library communications. Communicated the relaunch of Illume (SHAREit) after only ½ a day of scheduled down-time.
- Supported **InterLINK** in providing an in-depth analysis of Illume-wide and InterLINK consortia-only SHAREit statistics review in order to inform local policies and procedures.
- **Training (Individual & Group)**:
    - Provided multiple training sessions via webinar, email or telephone on a wide-variety of topics including NCIP, PI-ILL requesting, new Staff training, new Administrator training, Statistics, and more.
- Attended **A-G User Group Quarterly meetings** to provide BCUC feedback and Enhancement suggestions to the vendor and other consortia & library systems using SHAREit software.

Optimisations and New SHAREit Features

- Communicated and provided updated FAQs and documentation on new and updated SHAREit features including **Request Number Search** and **Title/Patron Browse** searching, and the **Prioritize Deflection Reason Enhancement**, originally requested by multiple BC libraries.
- **Auto-Graphics Feature & Enhancements:**
    - Provided feedback and suggestions to the vendor on new, existing and in-progress Enhancements & Features including Request Manager, User Admin, and Statistics & Reports updates, and more.
    - Provided feedback to Auto-Graphics on critical changes to the **ERTI smart-build** that reduce the effectiveness of Union Database holdings as the preferred authority for automatic lender list builds.
    - Provided feedback on critical changes to the **Days to Respond Calculation** that will impact the ability of ISO-target libraries to respond to SHAREit requests before they expire. Auto-Graphics applied a back-end customer setting update to extend our forced expiry to 20 days instead.
    - Provided member library feedback on updates to the **Request Number Search** and **Title/Patron browse** changes including a missing "Go Back" option that has lowered staff efficiency.
- **Patron-Initiated ILL Requesting (PI-ILLs):**
    - Assisted multiple libraries with temporary deactivation of PI-ILL requesting prior to the May 12th server migration. Re-activated guest patron requesting for libraries that desired assistance.
    - Provided support, training and troubleshooting to multiple libraries interested in activating, updating or trouble-shooting their **Patron-initiated Interlibrary Loans**, including *College of the Rockies* (BCRK), *Emily Carr University of Art + Design* (BVAE), *Greater Victoria Public Library (BVI), Okanagan College (BKOC), Prince George Public Library* (BPG), *Surrey Public Libraries* (BSUR), *Vancouver Public Library* (BVA) and more.
- **Patron Authentication (NCIP, SIP2 and SSO):**
    - Launched NCIP authentication and workflow for *Prince George Public Library* (BPG) on January 6th, 2025.
    - Continued to work closely with *Prince George Public Library* (BPG) to explore **NCIP** with **Patron-**

initiated requesting and automated patron authentication.

- Explored the set-up of **Patron Request Limits/Categories** with **Auto-Graphics** and **SirsiDynix** to allow libraries to launch PI-ILL requesting while automatically blocking patron's ineligible to request ILLs. *Currently in-progress to resolve issues with Symphony sending categories in unexpected NCIP fields and SHAREit automatically blocking accounts that are Expired, Blocked and Delinquent.*
- Coordinated with Auto-Graphics and SirsiDynix to explore the option for SirsiDynix Symphony libraries to use **NCIP version 2** with **Pickup Location** information passed directly to the ILS. *Currently SirsiDynix Symphony only supports NCIP version 1 which does not pass pickup location information.*
- Requested the creation of multiple new BCUC test sites for libraries interested in testing NCIP and SSO without impacting current live requests or patrons.

- Worked with Auto-Graphics and SFU IT to coordinate necessary updates, upgrades and troubleshooting of the SHAREit software and servers including network connection issues and firewall updates.

Main Activities for 2025

- Continue and expand the **Patron Authentication** pilot project for additional **NCIP** interested libraries, such as the G*reater Victoria Public Library* (BVI) and *Surrey Public Libraries* (BSUR). Include additional authentication pilot options such as SIP2, Exproxy, SSO or LDAP authentication. Create additional documentation and training for other Illume libraries also interested in automated patron authentication or NCIP workflow.
- Collaborate closely with the vendor Auto-Graphics on **External "Out-of-Province" requesting options** within the SHAREit software with a Use Case, as well as implementation and troubleshooting of possible WMS (WorldShare) search and/or ISO target activation. *Consulted with the extended SHAREit User Group community to discuss consortial experiences with OCLC WorldShare.*
- Launch an **Environmental Scan** of interlibrary loan software and solutions to identify opportunities, trends and strategic directions related to resource sharing in the province, including a review of the current BC resource sharing landscape. Consult with other Canadian and world-wide consortia on resource sharing options.

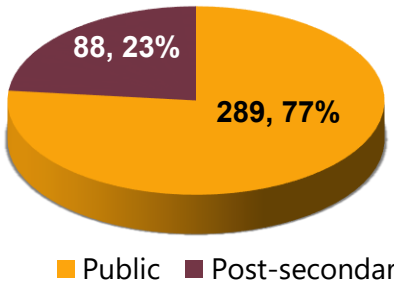
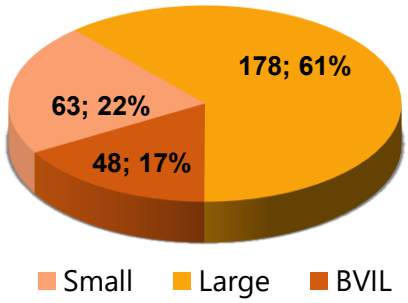
Support Case Analysis

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 (over 40,000 pop.) libraries. The usually larger volume of cases from Reading Centre (BVIL) brokering has also been pulled out to provide more accurate numbers for the rest of the province. **Public library questions below included 180 hours of library-specific support time.*

	Public vs. Post-Secondary		Public Library by Size		
Category	**Post-Secondary**	**Public**	**Small (< 40,000)**	**Large (> 40,000)**	**BVIL**
BVIL Brokering	-	48	-	-	48
ERTI Smart-build	-	10	3	7	-
Holidays or Closures	1	4	-	4	-
ILL Request Support	5	18	16	2	-
ISO Issues	17	2	-	2	-
Lender Policies	2	1	-	1	-
Live Shelf Status/Checks	-	5	-	5	-
Login & Access	-	5	2	3	-
NCIP	1	53	1	52	-
Network or Server Issues	10	23	6	17	-
Other	4	2	1	1	-
Other Bugs or Errors	4	9	7	2	-
Out-of-Province Requests	3	3	1	2	-
Patron-Initiated ILLs	2	23	4	19	-
Search Resources/Targets	-	2	1	1	-
Settings Configuration	2	9	5	4	-
SHAREit Enhancements/Features	1	10	3	7	-
SHAREit Software Issues & Bugs	2	42	10	32	-
Statistics Support	2	2	-	2	-
Training Support	18	3	-	3	-
Union Database	10	8	2	6	-
UX Customisation	3	1	1	-	-
Z-Target Set-Up & Issues	1	6	-	6	-
Total Support Cases	**88**	**289**	**63**	**178**	**48**

By Institution Type



By Public Library Size