

The following report includes Illume Administrative Support Centre activities from July 1 to December 31, 2019, a high-level action plan for future activities, and support case analysis.

Support for Existing SHAREit Software Functionality

Progress

- Responded to and managed **476 support cases** from public & post-secondary libraries, including brokerage for multiple public Reading Centres. Questions were predominately regarding bugs and new features/enhancements relating to the SHAREit V6 software upgrade transition, as well as Live Shelf Status/Checks, ISO issues, and Patron-initiated Interlibrary loans.
- Opened **45 Auto-Graphics (A-G) Helpdesk tickets** via the A-G ticketing system or email/telephone, reporting a variety of issues related to the V6 SHAREit software issues/bugs & enhancement requests, ISO issues, Statistics bugs, Z39.50, and Server errors/issues.
- **Live Shelf Status (LSS):**
 - Completed activation of LSS for **Okanagan Public Libraries (ORL)** and re-activation of **Surrey Public Libraries** for a total of **17 LSS sites**.
 - Progress made activating LSS for **Vancouver Public Library (VPL)**, including investigation of display of indigenous characters on UDB and Z-target records.
 - Maintained and updated LSS for multiple sites, including Horizon 7.5.5 sites such as **Burnaby Public Library** that needed re-configuration after their SirsiDynix software upgrade.
- Configured, re-mapped and managed **Z39.50 Search Targets** for multiple targets including Coquitlam Public Library and Surrey Public Libraries; a total of **36** public & post-secondary libraries have Z-targets activated.
- Worked with post-secondary ISO partner libraries and A-G to resolve issues with **ISO communications** between the new SHAREit V6 software and Relais/VDX.

Communications, Training & Marketing

Progress

- **V6 Upgrade & Re-brand from Outlook OnLine to Illume:**
 - Planned and launched (July 15th) the V6 software and rebrand, including renaming of the “Outlook Online” union database to the “BC Union Catalogue”.
 - Developed and delivered **Branding toolkit training and UX administration customisation** options for libraries to brand their Illume sites; created 45 custom Illume library banners and configured 12 libraries with their own branding colours and logos.
 - Maintained the new **Illume Admin Centre support website** with new and updated communications including creating or updating 18 guides, 14 FAQs, semi-annual reports and multiple News notices of software/server updates and downtime: <https://illumebc.ca/>
 - Created a new guide on customising the **V6 Brief and Full Record Display** for patrons and staff. Assisted **West Vancouver Memorial Library** and **Port Moody Public Library** with updating their display settings.

- Created a new guide on **Quick Links customisation** which helps create efficiencies in staff workflows.
- Communicated an A-G update on the status of **keyboard shortcuts** removed due to software limitations; this feature is important to accommodate staff with mobility issues and A-G has committed to investigating technical solutions for returning this feature in the future.
- Communicated ongoing bugs/issues with the new SHAREit V6 software and maintained a **V6 Migration Known Bugs or Issues** page: <https://illumebc.ca/news-events/news/2019/07/v6-migration-known-bugs-or-issues>
- Communicated IP, domain & email address changes during the V6 migration along with troubleshooting email address issues.
- **Guides & Training:**
 - Created and updated multiple guides on **Patron-initiated Interlibrary Loans** (including new videos), UX Admin Customisation, new Search & Results interface groupings/views and more.
 - Updated the **Search Widget guide** with our new custom code for V6 and instructions for updating any search widgets to V6 changes.
 - Provided training, advice & assistance to multiple libraries, including a session to approximately **30 Richmond Public Library** Staff on new and upcoming optimisations and features of SHAREit V6.
 - Provided training support and advice to multiple libraries on **Out-of-Province requesting** including **Burnaby Public Library, Nelson Public Library, Salt Spring Public Library** and more.
- **Auto-Graphics (A-G) SHAREit User Group Participation:**
 - Submitted enhancement features requested by our members to A-G and participated along with other consortia in discussing and voting on future enhancements.
 - Attended A-G User Group Quarterly meetings as Chair of User Group and facilitated a process for identifying a new User Group Chair.

Optimisations and New SHAREit Features

- Worked with A-G and Simon Fraser University IT to coordinate necessary **server updates**, upgrades and troubleshooting of the new V6 software.
- Created training documentation and communicated availability of the new highly requested **Borrowing Policy feature**, to hide the “Request This Item” button display based on format (eg. DVD).
- Coordinated, updated and implemented **Patron-Initiated ILL (PI-ILL)**:
 - Updated PI-ILL documentation including videos on the new V6 easy Forms updating interface and patron account configuration.
 - Offered support to libraries, such as **Fort. St. John Public Library, North Island College, Coquitlam Public Library**, and more on updating their PI-ILL forms.
 - Assisted **New Westminster Public Library**, with updating their PI-ILLs forms and offered advice on updating their pick-up locations for a branch renovation regarding current issues with dynamic pickup locations.
 - Worked with A-G to resolve issue with **dynamic Pickup Locations** not being saved; libraries can now update their Branch Pickup Locations in the Participant Record without impacting open requests.
 - Investigated and reported issues with the **Guest Request ILL Limits** and communicated with A-G the importance of this feature for our member sites.

Illume Administrative Centre Action Plan

This action plan outlines up-coming or in-progress activities; see the Progress Report (above) for completed activities. Previous Progress Reports are available on the Illume website: <https://illumebc.ca/about-us/reports/progress>

Planned Deliverable	Status
<i>Support for Existing SHAREit Functionality</i>	
Implement live shelf status where possible	On-going
Coordinate set-up of ISO ILL with new BC Relais libraries	On-going
Investigate set-up of ISO ILL with out-of-province libraries	On-going
Coordinate with live shelf status member libraries to implement a work-around for RDA/AACR2 mismatch issues and promote options to member libraries	Complete
Coordinate with vendor to implement the ILL Review (Modify Existing Request) feature for all sites & implement a fix for an issue with UDB ERTI lender list builds	Complete
Coordinate migration of the SHAREit software to the new V6 version	Complete
<i>Communications & Marketing</i>	
Create & execute a series of library staff surveys to assess satisfaction with support, training needs, union databases, software, etc (next survey will be a software needs assessment after V6 launch)	On-going
Develop & deliver online Illume training modules/sessions	On-going
Develop & deliver in-person and webinar training where requested	On-going
Develop & deliver regular Illume communiqués including a Newsletter	On-going
Rebrand & cleanup union database(s) to differentiate tools	On-going
Rebrand Illume service to Illume with the launch of V6	Complete
Support libraries communicating the re-branding from Outlook OnLine to Illume	On-going
<i>System Optimisations and SHAREit Enhancements</i>	
Support libraries through software transition to the re-coded version 6 of SHAREit	On-going
Create training and provide support implementing the new Borrowing Policy feature	On-going
Implement the identified recommended union database optimisations	2019-2020
Support libraries implementing Patron-initiated ILL	On-going
Achieve privacy compliance of all libraries with patron-initiated requesting	Complete
Investigate implementing NCIP functionality as desired	On-going
Support implementation of OpenURL pre-populated OLOL requests including from database vendors such as EBSCO & ProQuest	Investigating Version 6 API Options
Facilitate vendor development of enhanced statistics tools	On-going
Investigate out-of-province searching/requesting	On-going

Support Case Analysis

Support Cases, by Category and Institution Type

Below is 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 high volume of cases from Vancouver Public Library (VPL) and Reading Centre (BVIL) brokering & troubleshooting requests have also been pulled out to provide more accurate numbers for the rest of the province.

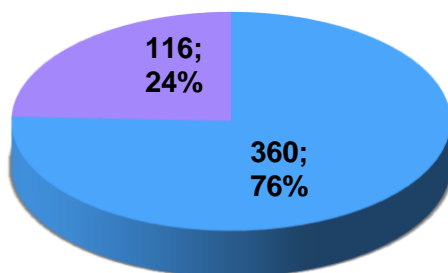
Public vs. Post-Secondary

Category	Post-Secondary	Public
BVIL Brokering		48
ERTI Smart-build	1	3
Holidays or Closures	3	3
ILL Request Support	5	23
ISO Issues	37	3
Lender Policies		3
Live Shelf Status/Checks		18
Login & Access	9	17
NCIP		2
Other	4	15
Other Bugs or Errors	4	14
Out-of-Province Requests		7
Patron-Initiated ILLs	1	16
Search Resources/Targets		4
Settings Configuration	4	17
SHAREit Enhancements/Features	7	22
SHAREit Software Issues & Bugs	28	67
Statistics Support	1	4
Training Support		9
Union Database	5	7
UX Customisation	4	31
Z-Target Set-Up & Issues	3	27
Total Support Cases	116	360

Public Library by Size

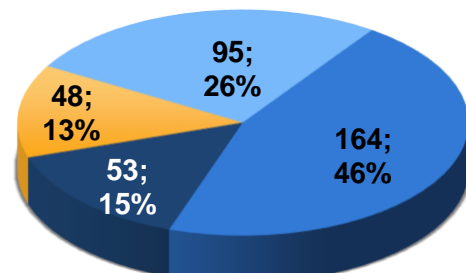
Small (< 40,000)	Large (> 40,000)	VPL	BVIL
			48
1	2		
	2	1	
8	11	4	
	1	2	
1	2		
4	10	4	
9	5	3	
	2		
4	10	1	
11	2	1	
4	3		
2	12	2	
2	1	1	
7	9	1	
8	12	2	
20	30	17	
1	2	1	
5	4		
1	4	2	
7	21	3	
	19	8	
95	164	53	48

By Institution Type



Public Post-secondary

By Public Library Size



Small Large VPL BVIL

Support Case Categories, by Number and Time Spent

The table below breaks down the public library support cases by category and provides information on the total number of cases initiated and the approximate amount of time spent on each category. The bulk of the SHAREit V6 transition troubleshooting involved *UX Customisation* (eg. Branding) and *SHAREit Enhancements/Features* or *SHAREit Software Issues & Bugs* in-progress or completed with Auto-Graphics.

Category	# Support Cases	Time Spent (in hours)	% Resolved to Date
BVIL Brokering	48	16.75	100%
ERTI Smart-build	3	2	67%
Holiday or Closures	3	0.75	100%
ILL Request Support	23	10	100%
ISO Issues	3	1.5	100%
Lender Policies	3	1.25	100%
Live Shelf Status/Checks	18	11.75	89%
Login & Access	17	5.5	100%
NCIP	2	1	100%
Other	15	5.25	100%
Other Bugs or Errors	14	7.75	100%
Out-of-Province Requests	7	3	100%
Patron-Initiated ILLs	16	8.5	75%
Search Resources/Targets	4	1.75	100%
Settings Configuration	17	7.25	100%
SHAREit Enhancements/Features	22	8.25	68%
SHAREit Software Issues & Bugs	67	35.75	78%
Statistics Support	4	2	50%
Training Support	9	10.25	100%
Union Database	7	2	100%
UX Customisation	31	17.25	100%
Z-Target Set-Up & Issues	27	21.25	89%

