

The following report includes Illume Administrative Support Centre progress & activities from July 1 to December 31, 2021, main activities for 2022, and a support case analysis.

### **COVID-19 Pandemic Response**

- Continued to support libraries through the **COVID-19** pandemic:
  - Provided **online live training** to multiple libraries as they trained new & returning staff, optimizing workflows to include shifting pandemic procedures, and optimizing Illume features in order to assist reduced Staff with the increased workflow.
  - Maintained a list of **academic libraries** restoring ILL services as libraries announced re-openings.

### **Support for Existing SHAREit Software Functionality**

- Responded to and managed **319** support cases from public & post-secondary libraries, including ramping up brokerage support for multiple public Reading Centres. Questions were predominantly related to Training Support, ISO Support, Lender Policies, SHAREit Software Issues & Bugs, and Union Database records.
- Opened **18 Auto-Graphics (A-G) Helpdesk tickets** via email or telephone, on a variety of issues related to the V6 SHAREit software issues/bugs, ISO issues, live shelf status checks, and server updates.
- **Union Databases (UDBs):**
  - Continued remaining steps for the **2020 Union Database Clean-up Project**, an initiative to refresh all BC Union Catalogue records and holdings.
  - Completed the refresh of all union database records after receiving MARC record extracts from every Illume participating library.
  - Identified remaining issues to be investigated in 2022, such as eJournal records for academic libraries and identification of libraries with RDA records for re-assigning Primary records to the “best” possible records available in our provincial system.
  - Removed lingering remaining records reportedly causing issues, such as those with multiple 245 Titles.
- **Live Shelf Status (LSS):**
  - Worked closely with multiple sites, including *Justice Institute of BC* and *College of the Rockies* to explore the addition of the Live Shelf Check feature to their site configuration.
  - Supported, maintained and updated LSS for multiple sites, including the *Vancouver Public Library* and *Coast Mountain College*.
- **ISO Support:**
  - Worked closely with two currently participating libraries, *Capilano University* and *British Columbia Institute of Technology*, not using Illume (SHAREit) as their primary ILL management software to ensure their Relais software is configured as an ISO-software target site to communicate directly with Illume.

- Worked closely with *Trinity Western University*, to complete their configuration, set-up and testing of ISO communications between Relais and SHAREit in order to launch them as an Illume participating library.
- Communicated with outside vendor OCLC to troubleshoot Relais communication issues with the SHAREit software, as well as tested various aspects of both Borrower & Lender ISO requesting between SHAREit and Relais.
- Worked closely with the University of Victoria, Auto-Graphics and SFU IT to resolve a significant issue with their Relais-SHAREit ISO communications.
- Configured, re-mapped and managed **Z39.50 Search Targets** for multiple sites; a total of **36** public & post-secondary libraries have Z-targets activated.
- Worked closely with the vendor Auto-Graphics to resolve an access issue with the BCUC Z39.50 target used by SHAREit libraries for copy cataloguing from the BC Union Catalogue union database and by ISO libraries to create requests in Relais/VDX.

### Communications, Training & Marketing

- Enhanced the **Illume Admin Centre support website** with new and updated communications. Created and updated 24 guides, 17 FAQs, semi-annual reports and multiple News notices of software/server updates and downtime and more: <https://illumebc.ca/>
- Created and updated multiple guides on Union Databases, Search Tips, Desktop Delivery, Undo Request Statuses, Best Practices, ILL Lender Policies, and more.
- Communicated ongoing bugs/issues with the SHAREit V6 software and maintained a **V6 Known Bugs or Issues** page: <https://illumebc.ca/v6-known-bugs-or-issues>
- Coordinated closely with *Trinity Western University* Administration and Staff to provide training on Relais-SHAREit workflow, Best Practices and Benefits & Responsibilities. TWU successfully completed all participation steps, including publication of an ILL Policy Page and submission of their union database catalogue records, in preparation to launch them as a full participating Illume member in early 2022.
- Supported **InterLINK** in developing and publishing ILL policy pages, including creating and communicating a template with recommendations on publishing **ILL Policy pages**. Guide and template are available here: <https://illumebc.ca/guides/public-ill-policy-template>
- Published the December 2021 Illume *Spark* newsletter: <https://illumebc.ca/news-updates/newsletter>
- **Training (Individual & Group):**
  - Provided multiple one-on-one and group training sessions via webinar or telephone on a wide-variety of topics including Request Workflow, ISO site set-up, Z39.50 configuration, Live Shelf Status, Search & requesting, Patron initiated ILLs and more.
  - Provided in-person training, in compliance with COVID-19 protocols, to *Douglas College* Administrators and Staff regarding Request Workflow, Best Practices, Desktop Delivery, ILL Review and more. Also discussed implementation of features such as Live Shelf Status Checks and Patron-initiated interlibrary loans in order to optimize Illume.
  - Provided multiple comprehensive online group training sessions to various *Sechelt Public Library* staff assigned new interlibrary loan duties due to a staff medical leave.
  - Due to ILL Staff & Administrators increased comfort in accessing online live training, the support centre has continued to maintain an **approximate 300% increase in Training requests** compared with previous years.

- **Supported the work of Eliminating ILL fees for Non-returnables between Partner Academic libraries:**
  - Completed a review of all BC ELN post-secondary libraries and their current settings recommended within the Best Practices for SHAREit Academic Libraries. Contacted libraries with outstanding configuration issues to provide training and assistance in support of compliance with the Best Practices.
  - Provided individual and group staff training online for Administrators & Staff, including *College of the Rockies* and *Northern Lights College*, to discuss workflow, settings configuration, load leveling, and optimization features, such as live shelf checks, available to support best practices.
- **Bringing BC ELN Associate Members into the Illume interlibrary Loan system:**
  - Developed a 10-Step Action Plan for BC ELN Associate members approved for participation in Illume.
  - Worked closely with associate member *Alexander College*, to provide training and communication regarding the BC ELN Associate Member Illume Participation Plan including an in-person session with Administrators and Staff regarding Illume workflow, recommendations, best practices, benefits & responsibilities, and next steps for joining Illume.
  - Also communicated the new participation plan to additional associate members interested in Illume participation including the *University Canada West* and *Acsenda College*.
- Issued the January - June 2021 Illume Administrative Centre Progress Report: <https://illumebc.ca/about-us/reports/progress>
- Attended A-G User Group Quarterly meetings to provide BCUC feedback and suggestions to the vendor Auto-Graphics and other consortia & library systems using the SHAREit software.

### Optimisations and New SHAREit Features

- Worked with A-G to coordinate necessary **server updates**, upgrades and troubleshooting of the V6 software.
- Provided support and information to multiple libraries activating & updating their **Patron-initiated Interlibrary Loans**, including *Sechelt Public Library*.
- Promoted new Enhancements for the SHAREit software requested by BCUC members, and voted on and provided feedback regarding proposed enhancements by other SHAREit customers and consortia. Auto-Graphics has committed in 2022 to the enhancement of Non-returnable (Copy) requesting for academic libraries and the addition of a new “Lender Lists Refresh” feature requested by BCUC members.

### Main Activities for 2022

- Negotiate another multi-year deal for the Auto-Graphics SHAREit license and hosting support.
- Investigate remaining steps in the **Union Database Cleanup Project**, including the inclusion of all eJournal records for BC ELN member libraries and identification of RDA record sites to help Auto-Graphics assign primary records and member holdings to the “best” possible records available in our consortia.
- Launch the addition of new Illume participating members including *Trinity Western University* and associate members *Alexander College* and *University Canada West*.
- Continue to support the BC ELN decision **to eliminate ILL fees for non-book items** between **BC ELN academic partner libraries** by developing and launching *Best Practices for ISO libraries*.

## 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 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. \*The Illume Service Partner Benefits & Responsibilities for BC ELN libraries resulted in a large increase in ISO-Relais set-up questions.

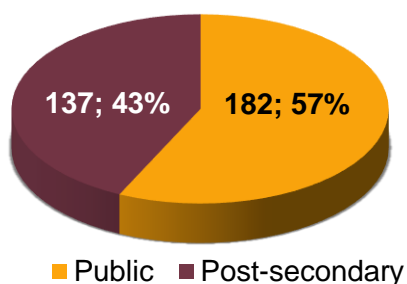
Public vs. Post-Secondary

| Category                       | Post-Secondary | Public     |
|--------------------------------|----------------|------------|
| BVIL Brokering                 |                | 59         |
| ERTI Smart-build               | 3              | 1          |
| Holidays or Closures           | 1              | 1          |
| ILL Request Support            | 3              | 15         |
| ISO Issues*                    | 47             | 1          |
| Lender Policies                | 4              | 18         |
| Live Shelf Status/Checks       | 8              | 4          |
| Login & Access                 | 1              |            |
| Network or Server Issues       | 6              |            |
| Other                          | 1              | 2          |
| Other Bugs or Errors           |                | 2          |
| Out-of-Province Requests       |                | 1          |
| Patron-Initiated ILLs          |                | 4          |
| Settings Configuration         | 9              | 4          |
| SHAREit Enhancements/Features  |                | 1          |
| SHAREit Software Issues & Bugs | 5              | 15         |
| Statistics Support             |                | 2          |
| Training Support               | 27             | 29         |
| Union Database                 | 10             | 12         |
| UX Customisation               | 3              | 1          |
| Z-Target Set-Up & Issues       | 9              | 10         |
| <b>Total Support Cases</b>     | <b>137</b>     | <b>182</b> |

Public Library by Size

| Small (< 40,000) | Large (> 40,000) | VPL       | BVIL      |
|------------------|------------------|-----------|-----------|
|                  |                  |           | 59        |
| 1                |                  |           |           |
|                  |                  | 1         |           |
| 6                | 5                | 4         |           |
| 1                |                  |           |           |
| 8                | 8                | 2         |           |
| 1                | 1                | 2         |           |
|                  |                  |           |           |
|                  | 2                |           |           |
|                  | 2                |           |           |
| 1                |                  |           |           |
| 2                | 2                |           |           |
| 4                |                  |           |           |
|                  | 1                |           |           |
| 3                | 4                | 6         | 2         |
| 1                |                  | 1         |           |
| 17               | 10               | 2         |           |
| 3                | 6                | 3         |           |
| 1                |                  |           |           |
| 6                | 1                | 3         |           |
| <b>55</b>        | <b>42</b>        | <b>24</b> | <b>61</b> |

By Institution Type



By Public Library Size

