

The following report includes Illume Administrative Support Centre progress & activities from July 1 to December 31, 2023, main activities for 2024, and a support case analysis.

### Support for Existing SHAREit Software Functionality

- Responded to and managed **195** support cases from public & post-secondary libraries, including brokerage support for multiple public Reading Centres. Questions were predominantly related to BVIL Brokering, Software Settings/Configuration, Patron-initiated ILLs, Training Support, ILL Request Support, and SIP2/NCIP.
- Opened **14 Auto-Graphics (A-G) Helpdesk tickets** via email or telephone, on a variety of issues related to the V6 SHAREit software issues/bugs, patron-initiated ILLs, ISO functionality, server updates and site configuration.
- Completed investigation and testing of solutions to resolve SPF Record issues with Patron Email Notices from SHAREit. Communicated the solutions, including a generic patron notice email address and SPF configuration advice, to all Illume libraries. Provided follow-up troubleshooting and support to libraries implementing the solutions.
- **Union Databases (UDBs):**
  - Assisted multiple libraries with trouble-shooting their record submissions with Auto-Graphics including *Alexander College (BBAC)*.
  - Investigated request errors potentially caused by holder-less deleted records, and coordinated with Auto-Graphics on a temporary hold to automatic deletions of these records until further information available.
- **Live Shelf Status (LSS):**
  - Assisted multiple libraries, including *Nicola Valley Institute of Technology (BMN)*, with Live Shelf Status mapping updates to resolve issues or for temporary deflections related to branch closures.
- **ISO Support:**
  - Assisted multiple ISO-target libraries, including the *British Columbia Institute of Technology (BBIT)* and *Capilano University (BVAC)* with troubleshooting of SHAREit-Relais related issues.
  - Assisted multiple SHAREit libraries with troubleshooting and managing ISO-target ILL requests, including *Thompson Nicola Regional District Library (BKCT)*.
  - Requested information and updates from the vendor Auto-Graphics on when **ISO 18626** will be available in SHAREit to replace ISO 10160/10161 communications for interested libraries. Auto-Graphics initially reported a target launch date of 4<sup>th</sup> quarter 2023, which has now been updated to 1<sup>st</sup> or 2<sup>nd</sup> quarter 2024 due to technical complications.
- **Z3950 Support:**
  - Configured, mapped and managed updates to Z39.50 Search Targets for multiple libraries, including *Alexander College (BBAC)*, *Prince George Public Library (BPG)*, and *University Canada West (BUCW)*.
  - A total of **42** public & post-secondary participating and partner libraries have Z-targets activated.

## Communications, Training & Marketing

- Enhanced the **Illume Admin Centre support website** with new and updated communications. Created and updated 5 guides, 5 FAQs, semi-annual reports and multiple News notices of software/server updates & downtime and more: <https://illumebc.ca/>
- Updated guides with changes related to existing features, such as Patron Email Notices, OpenILL and OpenURL, and communicated as appropriate.
- Published and communicated the *August 2023* and *December 2023* Illume Spark newsletters: <https://illumebc.ca/news-updates/newsletter>
- 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>
- Communicated updates related to the *Sparwood Public Library* (BSPA) temporary long-term closure where appropriate, to assist libraries with managing current Borrower & Lender requests with BSPA.
- Communicated solutions via the listservs, training and emails, to resolve SPF Record issues with Patron Email Notices from SHAREit, as well as the software updates to resolve SPF issues with the Staff Email Notices feature.
- **Training (Individual & Group):**
  - Provided multiple training sessions via webinar, email or telephone on a wide-variety of topics including SIP2/NCIP, Patron-initiated Interlibrary Loan requesting, OpenILL/OpenURL and 3<sup>rd</sup> party direct to SHAREit requesting, ISO configuration/issues, Search Targets/Resources, new Features/Enhancements, Statistics, and more.
- **Bringing BC ELN Associate Members into the Illume interlibrary Loan system:**
  - Launched the addition of new full participating member *Alexander College* (BBAC) to public and post-secondary libraries in November 2023.
- Issued the January - June 2023 Illume Administrative Centre Progress Report: <https://illumebc.ca/about-us/reports/progress>
- Presented a conference session to other SHAREit customers on the options, set-up & current functionality of the new SHAREit OpenILL feature, at the 2023 Auto-Graphics SHAREit User Group Conference.
- Attended one-on-one meetings with the vendor Auto-Graphics regarding upcoming new features, desired enhancements and improvements and ongoing issues.
- 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

- Met and coordinated with *Northern Library Federation* Directors and *Public Libraries Branch* to promote Illume Support assistance to libraries interested in SHAREit optimization features to streamline staff workflow. Features such as Patron-initiated requesting and Live Shelf Checks have been identified to reduce staff workload in the recent 5-year review of Public Library Turnaround Borrower & Lender statistics.
- Continued to work closely with vendors Auto-Graphics and EBSCO to finalize the upcoming new **OpenILL** feature, now expected in early 2024, 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 additional feedback to Auto-Graphics to enhance the feature to be used effectively with Non-returnable (Copy) requesting from discovery layers and database resources.

- Worked closely with multiple large Public libraries, including the *Greater Victoria Public Library* (BVI), *Prince George Public Library* (BPG) and *Vancouver Island Regional Library* (BNVI), interested in exploring SIP2 or NCIP to enhance or implement Patron-initiated requesting with automated patron authentication, as well as other staff workflow optimizations. Assisted libraries with creating updated workflows related to SIP2 or NCIP communications.
- Provided support, training and troubleshooting to multiple libraries interested in activating or updating their Patron-initiated Interlibrary Loans, including *Alexander College* (BBAC), *College of the Rockies* (BCRK), *North Vancouver District Public Library* (BNVD), *Prince George Public Library* (BPG), *Vancouver Island Regional Library* (BNVI) and more.
- Worked with Auto-Graphics 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. In 2023, approximately 80% of our submitted enhancements received the top votes by all other SHAREit customers. Including the improvement suggestion for the **Lending Policy** to have both Loan *and* Copy request type options for each Format which was the top voted improvement by all SHAREit customers.
- Coordinated a software solution with Auto-Graphics to resolve issues with the Staff Notices feature. Auto-Graphics temporarily customized our SHAREit software with a consortial generic email address “staff-enotice@illumebc.ca” to address the ongoing issues. Long-term A-G is also exploring an enhancement for all customers maintaining their own servers to customize this email address locally within consortia administration.
- Provided feedback and suggestions to the vendor Auto-Graphics on new, existing and in-progress Enhancements & Features including Automatic Retries, OpenILL, Permanent Patron Accounts, Statistics, Request Manager, Staff Notices, and Desktop Delivery.

### Main Activities for 2024

- Launch 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 and training.
- Provide group and individual training sessions to Public libraries, starting with Northern libraries, interested in implementing software optimizations and workflow improvements. Related to the outcomes from the 5-year public & post-secondary library turnaround statistical analysis.
- Implement optimizations such as SIP2/NCIP or LDAP/SSO authentication or communications for interested pilot libraries. And create documentation and training for other Illume libraries interested in automated patron authentication or SIP2/NCIP.
- As it becomes available from the vendor Auto-Graphics, communicate updates on ISO 18626 interoperability between SHAREit and external ILL software such as Relais, VDX or Tipasa. And provide support for ISO-target libraries interested in implementing or upgrading ISO communications with SHAREit.

## 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 78.75 hours of library-specific support time.

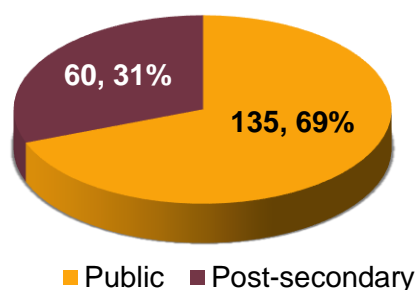
Public vs. Post-Secondary

Category	Post-Secondary	Public
BVIL Brokering	-	51
ERTI Smart-build	-	1
Holidays or Closures	2	6
ILL Request Support	4	14
ISO Issues	6	10
Lender Policies	3	3
Live Shelf Status/Checks	1	1
Login & Access	2	2
NCIP	-	13
Other	5	8
Other Bugs or Errors	1	2
Out-of-Province Requests	-	6
Patron-Initiated ILLs	5	15
Search Resources/Targets	-	2
Settings Configuration	13	16
SHAREit Enhancements/Features	2	4
SHAREit Software Issues & Bugs	-	7
Statistics Support	1	6
Training Support	10	15
Union Database	2	2
UX Customisation	1	6
Z-Target Set-Up & Issues	2	5
<b>Total Support Cases</b>	<b>60</b>	<b>135</b>

Public Library by Size

Small (< 40,000)	Large (> 40,000)	BVIL
-	-	51
1	-	-
4	-	-
2	8	-
-	4	-
-	-	-
-	-	-
-	-	-
-	13	-
2	1	-
1	-	-
2	4	-
-	10	-
-	2	-
1	2	-
1	1	-
3	4	-
4	1	-
1	4	-
-	-	-
3	2	-
-	3	-
<b>25</b>	<b>59</b>	<b>51</b>

By Institution Type



By Public Library Size

