# illume

When searching **Illume** a user can select the **Search Resources (formerly called Targets)** they wish to search, for example the BCUC union database (formerly OutLook Online), and/or university libraries virtual Z39.50 targets.

Default search targets can be activated and configured by **Illume Admin accounts** under **Staff Dashboard > Pac Admin > Search Resources**. Please contact the Illume Administrative Centre if you have any questions or would like some assistance configuring your search resources/targets.

Default search targets will appear to your guests/patrons and staff when they click on the **"Select Search Resource(s)"** 'stacked coins' icon next to the search box. Search resources can be grouped under different customizable headings, eg. Post-Secondary Libraries. They can also be configured to be displayed or selected (checked-off) by default differently for guests/patrons and logged in Staff. For example, you may wish to only allow your patrons to search the "BCUC" union database but display many additional search resources to Staff.

Staff can also configure their individual accounts to hide or change the search defaults. Check-out our **FAQ** here <https://illumebc.ca/faq-my-favorite-resources> for more information on configuring individual Staff accounts.
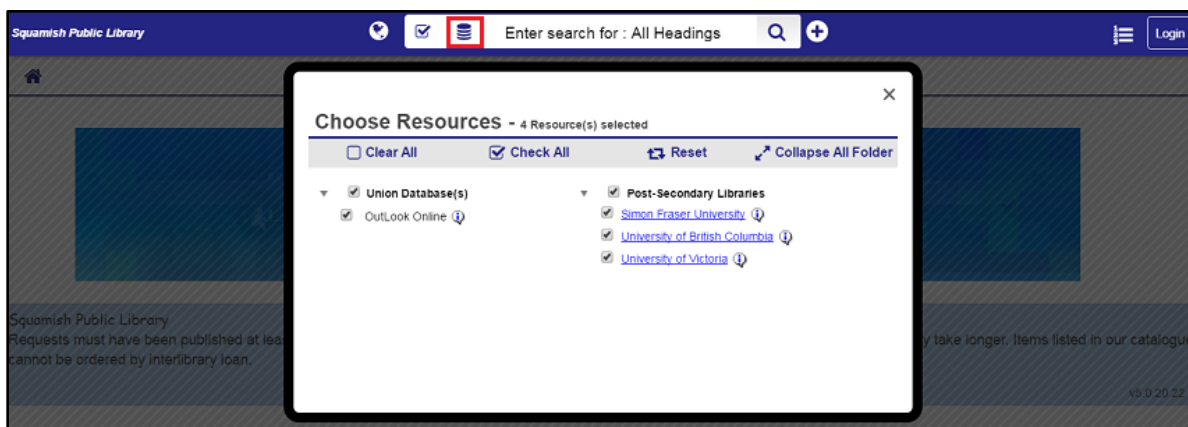
Important Notes when Configuring the Search Resource/Target Display:

There are a few things to take note of before you change your library's search target display:

- **Union Databases:** Public libraries are recommended to only activate the **BCUC union database** for their patrons. They **may wish to enable** the **ELN Media** or **ELN Serials** UDBs for Staff but please be aware these catalogues only search for Post-secondary media and serials. Public library media & serials are located within the BCUC union database instead.

- **Z39.50 Resources/Targets:** Although there is a long list of potential targets that you can enable, we recommend only activating the following:

  - Your Own Library Search Target if desired (eg. Squamish Public Library)
  - Simon Fraser University
  - University of Northern British Columbia

- University of British Columbia
- University of Victoria

- It's important to note that it's currently not possible to shadow or hide locations with Z39.50 searching. Activating your own library target can be useful to your patrons for up-to-date reminders of what's available – but they will also be able to see items/records that are normally hidden in your own catalogue.

- SFU, UBC, and UVic charge public libraries for interlibrary loan requests unless you have additional consortial agreements in place (eg. InterLINK with UBC and SFU).

- Now that the ERTI smart-build algorithm has been activated, any Search Resources/Targets you have activated for Staff will be used to create your lender list builds *even if they aren't checked-off by default*. The search results display and ERTI smart-build are two separate features in the software and both use active search targets differently. This means if you have the University of Victoria target available as a Search Resource their library code will also automatically be added to your lender list builds even if you don't display them during your search! Use the **Blocked Lenders** list option below to stop this from happening.

- **New!** The **Blocked Lenders** list is now available within your **Staff Dashboard > ILL Admin > Maintain Participant Record > Blocked Lenders** to stop the ERTI smart-build from automatically adding codes to your lender list build. This means you can now have charging library targets available for searching but still block their code(s) and avoid accidental charges/fees! More information available in our **FAQ** here: **http://illumebc.ca/faq-blocked-lenders**

Configuring Search Resource/Target Display for Your Library:

Follow the steps below to configure how search targets display for your library:

1. Login to Illume with an account that has **Administrative** permissions.
2. Click on the **Staff Dashboard > Pac Admin** tab **> Search Resources** option/link.
3. There will be a very long list of resources, and we recommend you use the search function in your browser (eg. Ctrl-F) to find the desired target. Or browse for the library that you want to add as a search target for either staff and/or patrons, and then click the **Add** or **Edit** button on the right-hand side.

4. To enable the library as a search target:

   a. **Activate a Target:** Check-off **"Select the resource – the resource is selected for use"** for this target to be used for searching and the ERTI smart-build algorithm.

   b. **Default Target:** Check-off **"Default resource – the resource is selected as default"** to make this target a default search resource/target. This means that it will always be shown as checked-off in the search display and search results will display if available. We recommend that you only check-off defaults for frequently used Staff resources or to set defaults for guests/patrons. Staff can over-ride these defaults in their individual account settings using our **FAQ** here <https://illumebc.ca/faq-my-favorite-resources>.

   c. **Guest/Patron Options:** Check-off both **"Guest User – this resource will be used by guest users"** and **"Patron User – Select this resource to be used by patron users"** to display this target to guests/patrons. As all our patrons search as guest users (not using logged in patron accounts) you currently need to check-off both options.

   d. **Staff Options:** Check-off **"Staff User – Select this resource to be used by staff users"** to display this target to logged in staff accounts. If you want a resource/target to *only* display to Staff, check-off just this option and not the guest/patron options above.

   e. **Resource Headings:** You can also choose which categories or "resource headings" a target will display under using the check-boxes in the **"Define resource headings"** section. See the section on page 4 for how to edit these Categories "Resource Headings".

   f. **Search Results Priorities:** You can also choose to define a priority position for search results. We recommend that you choose the **BCUC union database** as your top search result priority but you can also move other frequently used target results, eg. Simon Fraser University, higher in the search results using these options.

   g. Don't forget to click the **Submit** button to save your changes! You may need to logout and login again to refresh any changes and they may take a couple hours to display.
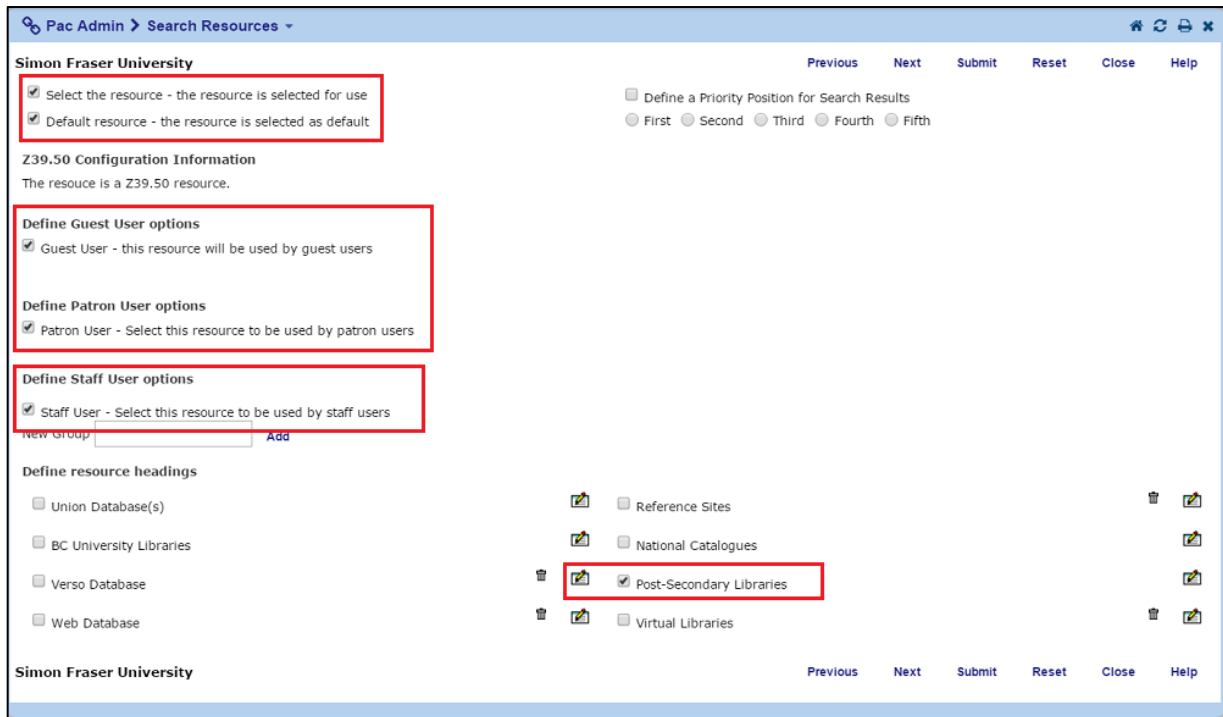
Editing the Resource Headings or Categories for the Search Resources/Targets:

If you don't like the wording of the Resource Headings categories you can edit the text of existing categories or add new ones – or even change the display order!

When logged in as an **Administrator** choose the option under **Staff Dashboard > Pac Admin > Define Resource Headings** to **"Add a New Heading"**, edit the text of an already existing heading, or change the sort order of the headings.

We recommend that you sort the union databases to the top. You can also set-up by default if a category is open (automatically displays all resources below the category) or collapsed (plus+ sign needs to be clicked to expand in the search display). Don't forget to click **Submit** to save your changes!

Headings without any resources assigned won't display in the search interface. You should also be able to remove any headings by deleting the text and clicking Submit. We recommend you make sure there aren't any resources assigned to that heading first before you delete.
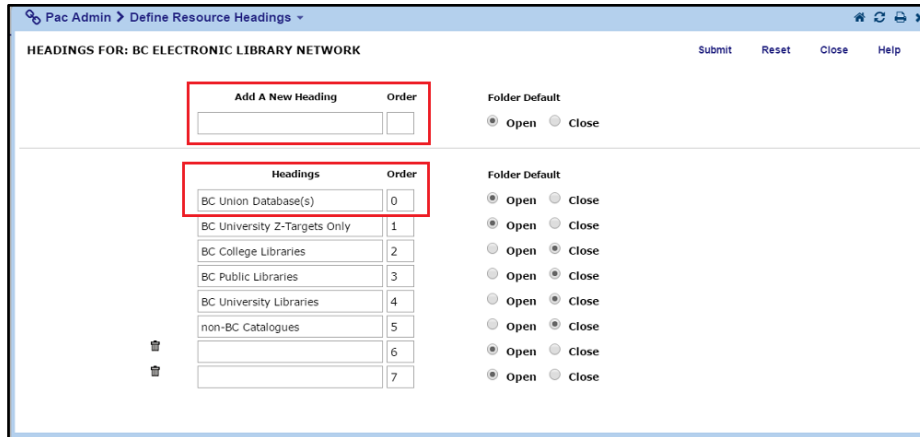
Have any questions or would like some assistance updating your Search Resources/Targets? Please contact the **Illume Administrative Support Centre**.