

Access PA SHAREit ILL Admin: The Participant Record

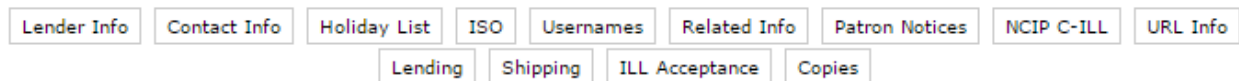
A library's **Participant Record** contains all the reference information necessary to ensure the proper handling of interlibrary loan (ILL) activities, including a participant profile, ILL contact information, Preferred Lender List, and ILL policy information.

- It is the responsibility of each library to maintain their Participant Record with accurate and up-to-date information.
- It is recommended that a record of the library's entries in the Participant Record is kept for reference purposes. Space is provided for that purpose in the charts of each section in this document.
- Participant profiles and ILL policies for other Access PA libraries are available via **Search Library Information** in the **ILL Admin Staff Menu**.

You must be logged into your library's Access PA SHAREit account to update the Participant Record.

- In the **ILL Admin Staff Menu**, select **Maintain Participant Record**

Scroll down to access each section or click on the desired section button displayed along the top of the record:



The ILL Policy sections (**Lending**, **Shipping**, **ILL Acceptance**, and **Copies**) open in new windows.

- These sections may also be accessed via the links at the bottom of the Participant Record page.

Descriptions of each field in the different sections are listed below, followed by a chart listing the field, the default entry (if applicable) and space to record your library's entry.

- The **Field** and **Default** fields for which you are responsible for verifying and updating are in **Bold** in the charts and the **Your Library's Entry** field is blank.
- System-wide defaults that should not be changed are noted as "System setting" in the field for your library's entry. These defaults are set to allow for smooth ILL throughout Pennsylvania.
- Settings that refer to patron-initiated requesting and other fields not applicable to Access PA are noted as "n/a" in the field for your library's entry.

NOTE: After making any changes to the Participant Record, click the **Submit** button to save the changes!

- On the main Maintain Participant Record page, the **Submit** button is available in the upper and lower right-hand side of the page.
- In the new windows that open for the **Lending**, **Shipping**, **ILL Acceptance**, and **Copies** policy sections, the **Submit** button is available in the upper right only.

Lender Info

Library Code: Your library's 5-letter ILL code

Library Name: Your library's name will be auto-filled but can be changed if necessary.

Agency Code: Not applicable to Access PA

Broker Code: Not applicable to Access PA

Days to Respond: Number of business (open) days within which the library will respond to ILL requests received as a lender. This field must have a value.

Days to Supply: Number of calendar days it takes the participant library, as a lender, to send requested material to a borrower. This field must have a value.

Days to Return: Number of calendar days (including shipping days) a borrower can keep material before it must be back to the lender. This field must have a value.

Maximum Pending/Will Supply Queue Size: The maximum number of requests that can be in the status of Pending or Will Supply/In Process at one time for a library.

Field	Default	Your Library's Entry
Library Code	your library's 5-letter ILL code	System setting
Library Name	your library's name	
Agency Code	n/a	n/a
Broker Code	n/a	n/a
Days to Respond	4	System setting
Days to Supply	7	System setting
Days to Return	35	System setting
Maximum Pending/Will Supply Queue Size	15 – academic, public, special 3 – schools	System setting

Days Requests are Processed: Check the days your library is open, even if ILL requests are not processed those days. This is to ensure that requests do not sit in your library's queue for too long.

Days Requests are Processed: **Mon.** **Tues.** **Wed.** **Thu.** **Fri.** **Sat.** **Sun.**

➤ NOTE: There must be a check in the first box, to the left of "Days Requests are Processed" for requests to be received at the library.

Field	Default	Your Library's Entry
Days Requests are Processed	Mon., Tues., Wed., Thu., Fri.	

Preferred Lender List: A listing of the Library Codes for the libraries designated as preferred ILL lenders. This list will be populated with the libraries in your district and region.

Field	Default	Your Library's Entry
Preferred Lender List	Your library's ILL regional group	

System Wide: A listing of the Library Codes for all potential lenders.

Field	Default	Your Library's Entry
System Wide	All Access PA libraries	System setting

Primary Default Lender: Not applicable to Access PA

Secondary Default Lender: Not applicable to Access PA.

Notes: Additional notes related to library information that are not indicated elsewhere in the Record.

Field	Default	Your Library's Entry
Primary Default Lender	n/a	n/a
Secondary Default Lender	n/a	n/a
Notes	n/a	

Move Request with Patron Note to Awaiting Approval: Used in patron-initiated requesting.

Show Blank ILL Form: Checkboxes to indicate whether the **Blank ILL Request** option will be shown on Search and Staff screens according to User Type (Guests, Patrons, Staff).

Show Request This Button: Checkboxes to indicate whether the **Request This Item** button will be shown in Brief Browse Lists and on Full Record Displays in the Search interface based on User Type (Guests, Patrons, Staff, Institutional).

Show Item Due Date to Patron: Used in patron-initiated requesting.

Show Patron Willingness to Pay Message: Used in patron-initiated requesting.

Field	Default	Your Library's Entry
Move Request with Patron Note to Awaiting Approval	No	n/a
Show Blank ILL Form	Staff	System setting
Show Request This Button	Staff	System setting
Show Item Due Date to Patron	No	n/a
Show Patron Willingness to Pay Message	No	n/a

Display History Information: Determines the order in which history information is shown in the **History Information** field on ILL Request Full Record Displays; either **Oldest First** or **Newest First**.

Calculate Renewed To Date: Determines how the system calculates the "renewed to" date when a renewal request for an item on loan through ILL by your library is accepted; either **Add to original due date** or **Add to Accept Renewal date**.

"Any Edition is Acceptable" Checked as default: Determines whether the **Any Edition is Acceptable** checkbox on the ILL Request Form and Blank Request Form is selected by default; either **Yes** or **No**.

Shipping Label Default: Determines the *default* selection for the **Include** menu on the Maintain Shipping Labels screen; either **Shipped Status Only** or **Both Shipped and Returned**.

Hide patron data on shipping labels: This setting *must be left at Yes* to ensure that neither your library's nor your lending partner's patron information is displayed on shipping labels.

Field	Default	Your Library's Entry
Display History Information	Newest First	
Calculate Renewed To Date	Add to Accept Renewal date	System setting
"Any Edition is Acceptable" Checked as default	Yes	
Shipping Label Default	Both Shipped and Returned	
Hide patron data on shipping labels	Yes	System setting

Display [ILL Lender] to Patrons/Guests: Used in patron-initiated requesting.

Allow patrons to change need-by date: Used in patron-initiated requesting.

Allow patrons to change pickup location: Used in patron-initiated requesting.

Set Default Need-by Date: Specifies the number of days added to the calendar date on which an ILL request is prepared and submitted to determine the “Need By” date for the request. The default value is 90 days but a specific date can be selected for individual ILL requests on the ILL Request Form.

Enable checking for duplicate requests: Yes/No button to indicate whether functionality is enabled to check for duplicate requests submitted by the same user. This is set to “No” to enable a library to place multiple requests for the same title.

Field	Default	Your Library’s Entry
Display [ILL Lender] to Patrons/Guests	No	n/a
Allow patrons to change need-by date	No	n/a
Allow patrons to change pickup location	No	n/a
Set Default Need-by Date	90	
Enable checking for duplicate requests	No	System setting

Owned by My Library

Show Owned By This Library Notification Message: Yes/No button to indicate whether the library has selected to display the “owned by this library” ILL message.

- An icon is displayed next to the request in the Awaiting Approval Status Browse List, and the Full Record Display for the request includes the message “This item is held by your library” in the Note field at the top of the screen. *The icon and message appear on the Browse list with the Awaiting Approval status even if your library chooses to not show the “Show Owned by This Library Notification Message” when placing the request.*
- Requests will still be placed in Awaiting Approval status when a request is placed for an item owned by your library (other than multi-copy requests).

Field	Default	Your Library’s Entry
Show Owned By This Library Notification Message	Yes	

ILL Request Form Patron Notices

Display Disclaimer Notice to Patrons: Used in patron-initiated requesting.

Display ILL Status Notice: Used in patron-initiated requesting.

Field	Default	Your Library’s Entry
Display Disclaimer Notice	No	n/a
Display ILL Status Notice	No	n/a

Address/Contact Information

Address fields: The fields in this section are self-explanatory and your library's information has been entered. Fields requiring explanation or special instructions are noted.

Field	Default	Your Library's Entry
Address 1	auto-filled for your library	
Address 2	auto-filled for your library	
City	auto-filled for your library	
State	auto-filled for your library	
ZIP	auto-filled for your library	
Country	USA	read-only field

Ship To fields are used to generate shipping labels so must be accurate.

Notes for IDS libraries:

Ship To Address 1: IDS library names must start with the library's IDS number followed by the library name, e.g.: IDS 123 The Library Name

Ship To Address 2: IDS libraries must use a physical address; UPS does not ship to PO boxes.

Field	Default	Your Library's Entry
Ship To Name	ILL Librarian	
Ship To Address 1	your library's name	
Ship To Address 2	your library's shipping address	
Ship To City	auto-filled for your library	
Ship To State	auto-filled for your library	
Ship To ZIP	auto-filled for your library	
Ship To Country	USA	read-only field
Route Schedule	n/a	n/a

ILL Contact fields: The fields in this section are self-explanatory and your library's information has been entered. **NOTE:** only one email address may be entered.

Field	Default	Your Library's Entry
ILL Contact Name	auto-filled for your library	
ILL Contact Title	auto-filled for your library	
ILL Phone Number: General	auto-filled for your library	
ILL Phone Number: Borrowing		
ILL Phone Number: Lending		
ILL Phone Number: Contact		
ILL Email Address	auto-filled for your library	
ILL FAX Number	auto-filled for your library	
Ariel Address	n/a	n/a
ILL Pickup Locations	n/a	n/a
Shipping Options	n/a	n/a

Holiday List

Lists the normal business days on which the library is closed for holidays or vacation.

- Dates must be entered as MM/DD/YYYY and each period must have a start and end date.
- You may enter dates either across a row or down a column.
- The system deletes dates from the **Holiday List** once the holiday has passed.

Start Date	End Date	Start Date	End Date
06/08/2015	06/12/2015		

Indicating that your library is closed for a “holiday” period will prevent your library from receiving requests; it does not affect your ability to place requests.

External Communications

The External Communications are applicable only to libraries using ILLiad.

- Information for those libraries will be entered.
- The section fields will be blank for all non-ILLiad libraries.

Usernames and Passwords

This section is not applicable for Access PA libraries.

Other Related Information

This section is not applicable for Access PA libraries.

Patron Notification Set-up

Email Notice Set-up

These sections refer to email notifications that may be emailed to patrons for specific statuses.

- Training will be conducted via webinars.

NCIP C-ILL Communication Parameters

This section is not applicable for Access PA libraries.

URL Information

Borrower emails:

Do you want e-mail notification for NEW borrowing requests in Awaiting Approval status?: Indicates whether or not the library will receive e-mail notifications on submission of *new* borrowing requests that have gone into the Awaiting Approval status (used for items owned by your library) (Yes or No).

E-mail notification address: The e-mail address to which notifications of *new* borrowing requests will be sent (e-mail notifications are sent *automatically* by the system).

Do you want email notification for ALL borrowing status changes?: Indicates whether or not the library will receive e-mail notifications for *all status changes* related to active borrowing requests (Yes or No).

E-mail notification address: The e-mail address to which notifications of ILL request status changes will be sent (e-mail notifications are sent *automatically* by the system).

Field	Default	Your Library's Entry
Email for NEW borrowing requests only?	No	
Email address		
Email for ALL borrowing status changes?	No	
Email address		

Lender emails:

Do you want e-mail notification for NEW lending requests only?: Indicates whether or not the library will receive e-mail notifications on receipt of *new* lending requests (Yes or No).

E-mail notification address: The e-mail address to which notifications of *new* lending requests will be sent (e-mail notifications are sent *automatically* by the system).

Do you want email notification for ALL lending status changes?: Indicates whether or not the library will receive e-mail notifications for *all status changes* related to active lending requests (Yes or No).

E-mail notification address: The e-mail address to which notifications of ILL request status changes will be sent (e-mail notifications are sent *automatically* by the system).

Field	Default	Your Library's Entry
Email for NEW lending requests only?	No	
Email address		
Email for ALL lending status changes?	No	
Email address		

Note that no emails are sent from the Access PA Training system.

The remaining fields in the URL Information section are not applicable to Access PA libraries.

Lending Policy

The **Maintain Lending Policy** chart lists the library's ILL lending policy for material types in its collection.

- The checkbox for **"Use my library's lending policies to determine if my library should receive requests of specific item types. Applies only to 'System Checked' items."** should be checked and the **Lending Policy** should be set to **"System Checked."**

The screenshot shows a form with a checkbox and a table. The checkbox is checked and has a red arrow pointing to it. The table has a red arrow pointing to the 'Lending Policy' dropdown menu, which is set to 'System Checked'.

Lending Policy	Lend (Y,N,NA)	Loan Period (days)	Renew (Y,N,NA)	Renewal Loan Period (days)	Fee(\$)	Pla
System Checked						

Indicate your library's lending policy for *each material type* listed to ensure the system checks if your library should receive a request for a specific material type.

- **NOTE:** You may choose to indicate your lending policy for "Not System Checked" items in the Lending Policy menu for informational purposes, but those item types are not used for ILL purposes.

Lend: Indicate the material types your library lends by selecting a response for *each* material type.

- Select **Y** (Yes) if your library *does* or **N** (No) if your library *does not lend* that material type.
- Select **NA** (Not Applicable) if your library *does not collect* the associated material type.

Loan Period (days): Enter the initial **Loan Period** (in calendar days, up to 365) for *each* material type.

- Do not enter loan periods for material types your library *does not* lend.
- For **System Checked** material types, the **Loan Period** specified (rather than the **Days to Return** value in your library's Participant Record) is used to calculate the default **Due Date** for the loan.
- If you wish the default **Due Date** to be calculated using the **Days to Return** value in your library's Participant Record, enter "0" in the **Loan Period** text box.

Renew: Indicate if your library allows renewals for *each* material type you lend.

- Select **Y** (Yes) if your library *does* or **N** (No) if your library *does not* renew that material type.
- Select **NA** (Not Applicable) if your library *does not collect* the associated material type.
- If a renewal request is received for an item of a **System Checked** material type for which the **Renew** value is set to **N** or **NA**, the system *automatically* updates the request to **Rejected Renewal** status.

Renewal Loan Period (days): Enter the **Renewal Loan Period** (in calendar days) for *each* material type.

- Do not enter renewal loan periods for material types your library *does not* lend.
- For **System Checked** material types, the **Renewal Loan Period** (rather than the **Days to Return** value in your library's Participant Record) is used to calculate the **Renewed To Date** for the loan.
- The **Renewal Loan Period** specified is *added to* the *original due date*, not to the date on which the renewal request is accepted.
- If you wish the default **Renewed To Date** to be calculated using the **Days to Return** value in your library's Participant Record, enter "0" in the **Renewal Loan Period** text box.

Fee: For each material type for which your library assesses a fee to the borrower, enter the fee amount in the **Fee** text box for *each* applicable material type.

- You may enter fee amounts in whole dollars or in dollars and cents.

Place Hold: Indicate whether holds may be placed for *each* material type your library lends.

- Select **Y** (Yes) if a hold *may be placed* or **N** (No) if a hold *may not be placed* for that material type.

Make Copies: Indicate whether or not your library will make and supply copies of items from *each* material type.

- Select **Y** (Yes) if your library *will* or **N** (No) if your library *will not* make copies of items of that material type.

Exceptions, Comments: Enter any comments or exceptions (up to a maximum of 300 characters) related to the lending policy for *each* material type your library lends in the associated text box, e.g.:

- Books: Do not lend reference books
- Remember that you may attach a *Conditional* status to requests for specific items and indicate the condition (such as “Library Use Only” before lending that item.

Material Type	Lend (Y,N, NA)	Loan Period (days)	Renew (Y,N, NA)	Renewal Period (days)	Fee (\$)	Place Hold (Y,N)	Make Copies (Y,N)	Exceptions, Comments (300 char. max.)
Audio Cassettes - Music								
Audio Cassettes - Spoken Word								
Books								
CD-ROMs								
CDs - Music								
CDs - Spoken Word								
Dissertations / Theses								
DVDs								
Electronic Materials								
Federal DOCs								
Maps								
Microfiche								
Microfilm								
Microopaque								
Newspapers								
Other Gov DOCs								
Serials								
Videocassettes								

Shipping Policy

The **Maintain Shipping Policy** chart lists shipping methods (US Mail, UPS, etc.). Indicate whether or not the library utilizes the associated shipping method and list the materials that may be shipped by each method.

- IDS libraries should indicate Yes for UPS
- Libraries that use a district (or local) courier may indicate Yes for Other

Shipping Methods	Materials (max. 50 characters)	Yes or No
US Mail		
UPS		
Express Mail		
Other		

ILL Acceptance Policy

The **Maintain Acceptance Policy** chart lists ILL request submission methods. Indicate whether or not the library accepts ILL requests submitted using the associated method.

ILL Acceptance Methods	Yes or No
Phone	
Fax	
E-Mail	
Mail	
Hand Delivered	
ALA Form	
Other	

Copies Policy

The **Maintain Copies Policy** chart lists copy methods (Photocopy, FAX, etc.), and identifies the fees charged for copy requests supplied by the lender.

	Photocopy (50 characters max.)	Fax (50 characters max.)	Ariel, Email, Other (50 characters max.)
# of copies at no charge			
Per copy charge			
Electronic Data			
Microfiche			
Microfilm			
Microopaque			
Other			