

Access PA SHAREit: Participant Record

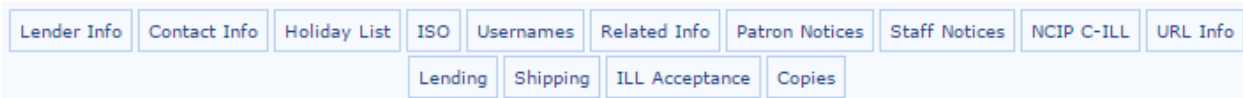
A library's **Participant Record** contains all the reference information necessary to ensure the proper handling of interlibrary loan (ILL) activities, including a participant profile, ILL contact information, Preferred Lender List, and ILL policy information.

- 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** menu on the **Staff Dashboard**.

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

- Select **Maintain Participant Record** in the **ILL Admin** menu on the **Staff Dashboard**.

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.

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.

Note: Library patrons do not log into SHAREit so the checkboxes for **Select to display to patrons** are not applicable for Access PA libraries.

Lender Info

Lender Information

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.

Library Type: Your library type: Academic, Correctional, Public, School, Special, or Other.

Agency Code: Not applicable to Access PA

Broker Code: Not applicable to Access PA

| Field | Default | Your Library’s Entry |
|---------------------|----------------------------------|----------------------|
| Library Code | your library’s 5-letter ILL code | System setting |
| Library Name | your library’s name | |
| Library Type | Your library type | System setting |
| Agency Code | n/a | n/a |
| Broker Code | n/a | n/a |

Days to Respond: Number of days (open) for the library to respond to ILL requests before moved to the next potential lender. This field must have a value. Partial days are counted, so this is at least 3 full days.

Days to Supply: Number of calendar days for the lending library to send requested material to a borrower and be marked Received, or they will display as Not Received. This field must have a value.

Days to Return: Number of calendar days (including shipping days) a borrower can keep material before it is due back to the lender. This field must have a value. NOTE: The Loan Period set in the Lending Policy takes precedence for loans; Days to Return is used only if a Loan Period is not set for a format.

Maximum Pending/Will Supply Queue Size: The optimum maximum number of requests a library will have in the Pending and Will Supply queues combined. If a library has the maximum number, SHAREit will move that library further down the lending string.

| Field | Default | Your Library’s Entry |
|--|--------------------|----------------------|
| Days to Respond | 4 | System setting |
| Days to Supply | 14 | System setting |
| Days to Return | 35 | System setting |
| Maximum Pending/Will Supply Queue Size | 100 (50 – 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” must be checked 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: The codes for libraries in your district and ILL regions, designated as your preferred lenders. It may be edited, for example, to delete members of a local ILL system so they don’t also receive requests via SHAREit, and you may add libraries you traditionally lend to and borrow from.

System Wide: A listing of the Library Codes for all potential lenders. *This list cannot be edited.*

Primary Default Lender: Not applicable to Access PA

Secondary Default Lender: Not applicable to Access PA.

| Field | Default | Your Library’s Entry |
|------------------------------|--|----------------------|
| Preferred Lender List | Your library’s regional ILL group | |
| System Wide | All Access PA libraries | System setting |
| Primary Default Lender | n/a | n/a |
| Secondary Default Lender | n/a | n/a |

Notes: Additional notes related to library information not indicated elsewhere in the record (optional).

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.

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 |
|--|---------|----------------------|
| Notes | n/a | |
| 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**.

NOTE: This refers to the edition, not format. It may be changed on individual requests.

| 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: 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 |
|-------------------------------------|----------------------------------|----------------------|
| 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.

Allow batch request from list: Used in patron-initiated requesting; not available for staff logins.

| 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 |
| Allow batch request from list | No | n/a |

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. Specific dates can be selected for individual ILL requests on the ILL Request Form.

Set Minimum Need-by Date: Used in patron-initiated requesting.

Enable checking for duplicate requests: Indicates whether functionality is enabled to check for duplicate requests submitted by the same user. “No” enable a library to place multiple requests for the same title.

Time Zone Adjustment (in hours): This setting *must be left as is*, since SHAREit server is located in the Nevada desert, which is 3 hours behind PA.

| Field | Default | Your Library's Entry |
|--|---------|----------------------|
| Set Default Need-by Date | 90 | |
| Set Minimum Need-by Date | 0 | n/a |
| Enable checking for duplicate requests | No | System setting |
| Time Zone Adjustment (in hours) | 3 | System setting |

Owned by My Library

Show Owned By This Library Notification Message: Indicates whether the “owned by this library” ILL message is displayed when placing requests for titles owned by the library.

- Requests will still be placed in Awaiting Approval status (except multi-copy requests) and must be changed to Approved-Send for the request to go to the first potential lender.
- The “home” icon next to the title in the Awaiting Approval Status Browse List and the message “This item is held by your library” at the top of the Full Record Display for the request will still display.

| 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 |

Contact Info

Address/Contact Information

Address fields: Your library's information has been entered.

- These fields are informational only and *are not used to generate shipping labels*.

| 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:

- Include your IDS number; add it either before or after your library name, e.g., Library Name IDS 123
- Include a physical address; IDS uses UPS, which 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 |

Contact fields: Edit your library's information as necessary.

➤ Only one email address can be entered in Email Address fields.

Contact 1: Your library's primary ILL contact information.

| Field | Default | Your Library's Entry |
|-----------------------------|------------------------------|----------------------|
| Contact Type | ILL Contact | System setting |
| 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 |

Contact 2 and **Contact 3:** May be used to enter additional contacts for your library.

Contact Type options are: ILL Contact, Director Contact, Technical Contact, Billing Contact, and Other Contact.

| Field | Default | Your Library's Entry |
|-------------------------|-------------|----------------------|
| Contact Type | ILL Contact | |
| Contact 2 Name | | |
| Contact 2 Title | | |
| Contact 2 Phone Number | | |
| Contact 2 Email Address | | |
| Contact 2 FAX Number | | |

Holiday List

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.

Holiday List (Input format MM/DD/YYYY) **Select to display to patrons**

| Start Date | End Date | Start Date | End Date |
|---|---|----------------------|----------------------|
| <input type="text" value="05/13/2016"/> | <input type="text" value="09/05/2016"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

- The system deletes dates from the **Holiday List** once the holiday has passed.
- 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.

ISO

External Communications

The External Communications are applicable only to libraries using ILLiad, an external ILL system.

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

Username

Usernames and Passwords

This section is not applicable for Access PA libraries.

Related Info

Other Related Information

This section is optional and includes whether or not the library is open to the public and the hours the library is open. When logged into SHAREit, this information is visible either by searching for a library in [Search Library Information](#) or by clicking on a library name link in the [Where To Find It](#) section when viewing a full record display. SHAREit does not use the information for ILL purposes.

Note: Library patrons do not log into SHAREit so the checkboxes for **Select to display to patrons** are not applicable for Access PA libraries.

Patron Notices

Patron Notification Set-up and Email Notice Set-up

Patron email notifications are not applicable for Access PA libraries.

Staff Notices

Staff Notification Set-up

- If you select **Yes** to receive notifications, enter the email address to which they should be sent.
- Only one email address can be entered.
- Notifications are sent *automatically* by the system.

Borrower emails

Do you want email notification for NEW Awaiting Approval requests only?: Indicates whether or not the library will receive email notifications on submission of *new* borrowing requests that have gone into the Awaiting Approval status (used for items owned by your library).

Do you want email notification for ALL borrowing status changes?: Indicates whether or not the library will receive email notifications for *all status changes* related to active borrowing requests.

| 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 email notification for NEW lending requests only?: Indicates whether or not the library will receive email notifications on receipt of *new* (Pending) lending requests.

Do you want email notification for ALL lending status changes?: Indicates whether or not the library will receive email notifications for *all status changes* related to active lending requests.

| 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: Emails are sent from the live (production) system but not from the Access PA Training system.

NCIP C-ILL

NCIP C-ILL Communication Parameters

This section is not applicable for Access PA libraries.

URL Info

URL Information

This section is optional and can include links to the library's catalog, homepage, directions, and ILL information. When logged into SHAREit, this information is visible either by searching for a library in **Search Library Information** or by clicking on a library name link in the **Where To Find It** section when viewing a full record display. SHAREit does not use the information for ILL purposes.

Note: Library patrons do not log into SHAREit so the checkboxes for **Select to display to patrons** are not applicable for Access PA libraries.

Lending

Lending Policy

In the **Maintain Lending Policy** chart, 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.

- Select 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.**”
- The **Lending Policy** should be set to “**System Checked.**”

Use my library's lending policies to determine if my library should receive requests of specific item types. Applies only to 'System Checked' items.

| Lending Policy | Lend (Y,N,NA) | Loan Period (days) | Renew (Y,N,NA) | Renewal Loan Period (days) | Fee(\$) | Place Hold (Y,N) | Make Copies (Y,N) | Exceptions, Comments (300 characters max) |
|----------------|---------------|--------------------|----------------|----------------------------|---------|------------------|-------------------|---|
| System Checked | | | | | | | | |

Note: You may switch to the “Not System Checked” chart and enter your library's policies for those item types. That chart is informational only, though, and is not used by SHAREit for ILL purposes.

- When logged into SHAREit, this information is visible either by searching for your library in **Search Library Information** or by clicking on the link for your library in the **Where To Find It** section when viewing a full record display.

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.

- 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.
- Do not enter loan periods for material types your library *does not* lend.
- 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.

- 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.
- Do not enter renewal loan periods for material types your library *does not* lend.
- 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: Enter the fee amount for each material type for which your library assesses a fee to the borrower.

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

Place Hold: Not applicable to Access PA libraries as holds are not placed on specific items.

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

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

Exceptions, Comments: Enter comments or exceptions (maximum of 300 characters) related specific material types, e.g., Books: Do not lend reference books or new bestsellers.

- 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, ILL Acceptance Policy, and Copies Policy

These policies are informational only and are not used by SHAREit for ILL purposes.

- When logged into SHAREit, this information is visible either by searching for your library in [Search Library Information](#) or by clicking on the link for your library in the [Where To Find It](#) section when viewing a full record display.

Shipping

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

ILL Acceptance Policy

The [Maintain Acceptance Policy](#) chart lists ILL request methods. Indicate whether or not the library accepts ILL requests submitted by that method.

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

Copies

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 | | | |