



SHAREit Top 10

Spring User Conference
April 2018

After completing this training you will be able to:

- Understand what happens after you upload your bibliographic records to the Auto-Graphics server
- Understand how SHAREit builds a lender list to process requests
- Keep your Participant Record up to date with correct information
- Keep eBooks and other items you can't or don't loan out of the Access PA SHAREit database
- Read the Request History to determine where any request is in the process.
- Understand the importance of Borrower and Lender Notes in SHAREit
- Recover from inadvertent status changes
- Complete a request from Returned status
- Get the statistics you need for your reporting
- Get updates and reminders via Access PA News for SHAREit Tips

Top 10 Things **YOU** Need to Know About SHAREit

(Questions taken from participants' most frequently-asked SHAREit support emails)

1. How long does it take before our uploaded file appears in SHAREit?
2. What does SHAREit do when a request is placed?
3. How do I keep my Participant Record up to date so I get notifications but don't get requests when I am not at the Library?
4. How can I keep eBooks and other non-loaned items out of the Access PA SHAREit database?

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Top 10 Things **YOU** Need to Know About SHAREit

(Questions taken from participants' most frequently-asked SHAREit support emails)

5. How can I find out where any request is in the process?
6. What do Borrower and Lender Notes do in SHAREit?
7. OOPS! How can I fix inadvertent status changes?
8. How do requests get fully completed?
9. How can I get the statistics I need for my monthly reports?
10. How can I learn more about SHAREit updates?

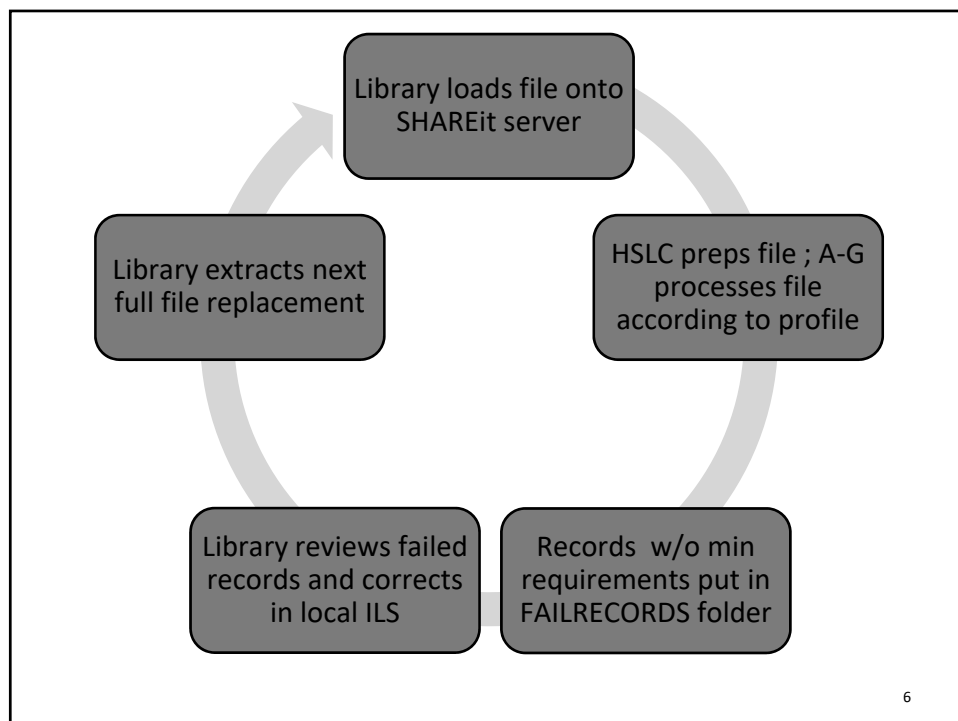
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1. How long before our uploaded file appears in SHAREit?

All being well:

- HSLC staff process files twice weekly, then sends them on to Auto-Graphics, which usually loads them within 48 hours.
- The FAILRECORD file for each library is immediately rewritten after each load. The date of this file is the ***actual date of your library's last load***.
- HSLC receives a report of files loaded at the ***end of each month***, then sends load acknowledgment emails to libraries.

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2. Building Lender Lists

What does SHAREit do when a request is placed?

1. **Search**--Search Selected Sources (SSS) is used to search resources for matching records
2. **Validate** records
3. **Check library's:**
 - Lending Policy
 - Holiday List



All good? Request is sent to the library.

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Building Lender Lists-Search

What is SSS? Search Selected Sources

The system uses SSS to find owning libraries by searching for and attempting to match on the following attributes *first*:

ISBN and ISSN

If there are no matches SHAREit searches using:

- **Author** (first of 1xx or 7xx, \$a\$b) and **Title** (245 \$a\$b)

If there are no matches from the ISBN/ISSN and Title/Author searches, SHAREit searches on:

- **Title** (245 \$a\$b)

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Building Lender Lists-Validate

SHAREit compares the matched records to the source bib record used to generate the ILL request.

Records retrieved from all searches are validated on the following fields **before the lender is added**:

Author: 100 \$a / 110 \$a\$b/111 \$a\$b\$d

Title: 245 \$a\$b\$n\$p

Publisher: 260 \$b | 264 \$b

Date: 260 \$c | 264 \$c



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Building Lender Lists-Validate

Leader Validation – Type of Record (bytes 6 and 7)

007 Validation: checks up to 5 occurrences; captures 1st 2 bytes when the first byte matches a value dependent on leader byte 6:

Book –if leader/06 = “a” or “t”:

- Check for 007/00 = “t”
- Check for 2nd byte match

Sound Recording –if leader/06 = “l” or “j”:

- Check for 007 = “s”
- Check for 300 \$a to distinguish abridged/non-abridged

Projected Medium –if leader/06 = “g”:

- Check for 007 = “m” or “v”



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Building Lender Lists-Library Checks

Lending Policy

- If library does not lend a particular format, it will be skipped and the request will move to the next potential lender.

Holiday List

- SHAREit checks the library's Holiday List **and** Days to Respond prior to advancing the request.
 - The library will get the request if it has an open day before the Days to Respond expires.
 - The library will be skipped if the Days to Respond will expire before it re-opens.

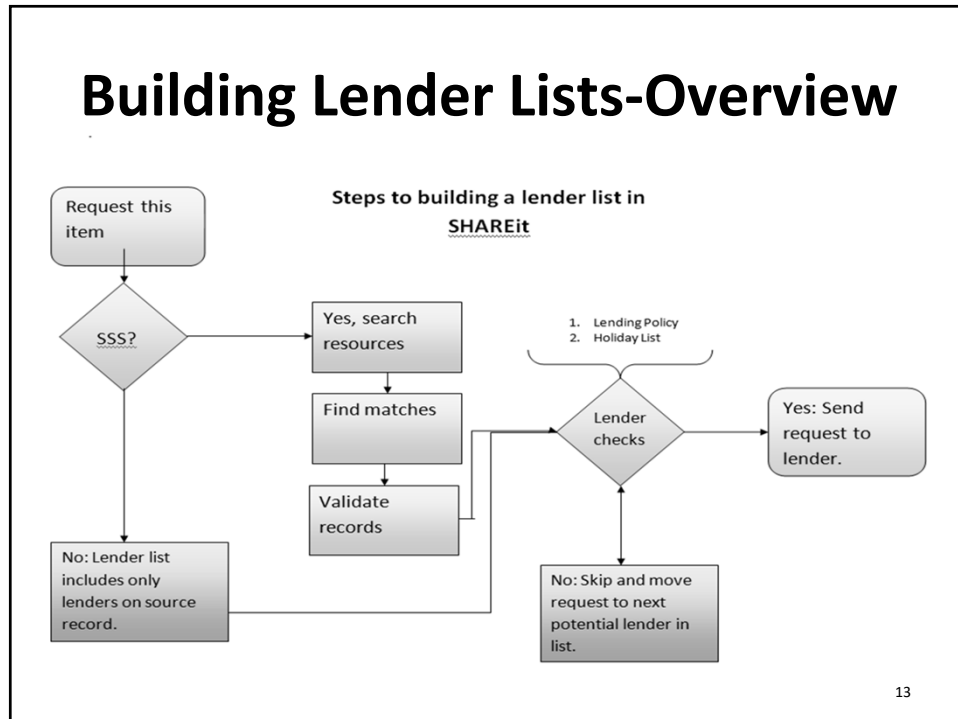
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Building Lender Lists-Summary

- If no matches are found in additional sources and/or the matched records fail validation, the request will only be sent to the libraries on the source record.
- When additional matches are found: If a library does not lend that format, or, If an item is not available, or, If the library is closed the request will be sent to the next potential lender and it's Lending Policy, Availability, and Holiday List will be checked.
- If a library does not fulfill a request, but there are additional potential lenders, the process will **start over** at the Lender Checks step.
- If a library does not fulfill a request and there are no additional potential lenders, the request will go back to the borrowing library in either **Unfilled** or **Retry** status.

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Building Lender Lists-Overview



3. Keep Your Participant Record up to date

Have you checked your Participant Record recently?

Now you know that SHAREit will be checking the following for each request:

- Days to Respond
- Lending Policy
- Holiday List

[Access PA SHAREit ILL Admin: Participant Record](#) (Ask support for password)

Participant Record -- Days to Respond

- Days to Respond:** Number of days (open) for the library to respond to ILL requests before the request moves to the next potential lender. This field **must** have a value. Partial days are counted, so this is **at least 3** full days and the default is **4**. **Please do not edit this number to be less than 3.**

Lender Info Lender Information

Field	Default	Your Library's Entry
Days to Respond	4	System setting
Ref Request Default	n/a	n/a
Days to Supply	14	System setting
Days to Return	35	System setting

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Participant Record--Holiday List

- Holiday List: have you set your holiday dates?**

- The SHAREIt Tip [Setting Holiday Dates](#) provides an overview of how to set each holiday period.**

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Participant Record--Holiday List

- **Holiday List:** make sure it's up to date so requests move through the lender string more quickly:

7. KNOS1 - system
 Change: 1/6/2018, Deadline Expired
 Notes: Forwarded to next lender KMCKE by system during midnight processing.

6. KSOEM - system
 Change: 1/2/2018, Deadline Expired
 Notes: Forwarded to next lender KNOS1 by system during midnight processing.

5. KSOHE - system
 Change: 12/27/2017, Deadline Expired
 Notes: Forwarded to next lender KSOEM by system during midnight processing.

4. KWHEL - system
 Change: 12/21/2017, Deadline Expired
 Notes: Forwarded to next lender KSOHE by system during midnight processing.

3. PHTWP - system
 Change: 12/15/2017, Deadline Expired
 Notes: Forwarded to next lender KWHEL by system during midnight processing.

2. PSXCL Lender Processor
 Change: 12/11/2017 6:33:21 PM, Add Lenderlist

1. PSXCL_psxclll
 Change: 12/11/2017 6:32:34 PM, Awaiting Lenders
 Notes: Created from record no. ACCESSPA_UDB:391343 by staff

USA

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Participant Record--Choose your Partners

- **Preferred Lenders/Blocked Lenders**

Lender Info Lender Information

Field	Default	Your Library's Entry
Preferred Lender List	Your library's regional ILL group	
System Wide	All Access PA libraries	System setting
Blocked Lenders	Blank	

Preferred Lender List: Edit this to...

- Delete members of a local ILL system so they don't receive duplicate requests via SHAREit,
- Add libraries you traditionally lend to and borrow from.
- Requests will go first to libraries listed in the Preferred Lender List, in **their display order.**

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Participant Record--Choose your Partners

- Preferred Lenders/Blocked Lenders

Lender Info Lender Information

Field	Default	Your Library's Entry
Preferred Lender List	Your library's regional ILL group	
System Wide	All Access PA libraries	System setting
Blocked Lenders	Blank	

System Wide: A listing of the library codes for **all** potential lenders that cannot be user-edited. If a request cannot be filled by a Preferred Lender, the request will go to libraries in the System Wide List in **random** order.

Blocked Lenders: Library codes added to this list will be blocked from being automatically added to the library's lender list even though they are in the System Wide list.

There is no capacity to block borrowers, only the ability to state "Will Not Supply" per item due to a library's reason.

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Participant Record--Change of contact?

- Contact and Shipping Information

Contact Info Address/Contact Information

Address fields: Your library's information has been pre-filled but must be checked and corrected if necessary.

Ship To fields are used to generate shipping labels and must be completed.

Ship To Name: enter the name of your library.

Ship To Address 1 and 2: enter the physical address of your library and, if used, a PO Box number.

IDS libraries:

- Include your IDS number before or after your library name, e.g., Library Name IDS 123 (this is not required by IDS by will make it easier for other IDS libraries when shipping)
- Include a physical address; IDS uses UPS, which does not ship to PO boxes

Route Schedule: Not applicable for Access PA libraries.

Field	Default	Your Library's Entry
Ship To Name	Blank	
Ship To Address 1	Blank	
Ship To Address 2	Blank	
Ship To City	Blank	
Ship To State	Blank	
Ship To ZIP	Blank	
Ship To Country	USA	read-only field
Route Schedule	Blank	n/a

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Participant Record--set up notices

- **Staff Notices**

Staff Notices **Staff Notification Set-up**

Borrower emails: Enter an email address to receive notices, selected based on status changes, for your requests as a borrower by checking the box to next to the status.

Lender emails: Enter an email address to receive notices, selected based on status changes, for your requests as a lender by checking the box to next to the status.

If you are still not receiving notices after setting them up in SHAREit, they may be ending up in your SPAM folder. Ask your IT staff to whitelist email from @hslc.org **AND** @auto-graphics.com to ensure email delivery.

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4. Participant Record--Lending Policy

- **Lending Policy: have you checked yours lately?**

- For each format, indicate whether your library lends and, if so, the loan period; if the format can be renewed, and the renewal loan period. (Selecting Yes for Renew does not make Renewals automatic.)
- Remember the Loan Period takes precedence over the Days to Return when setting due dates.
- When setting Loan Periods, remember that shipping time is included.
- Make sure the Lend and Loan Period and Renew and Renewal Loan Periods agree.

- **The SHAREit Tip Complete Your Lending Policy! provides an overview of the fields that need to be complete.**
- **The SHAREit Using NA vs. N in Your Lending Policy explains when to use N vs. NA.**

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To lend or not to lend?

3 ways to exclude materials from lending by SHAREit:

- Lending policy
- Exclude records when you create the bib file extract
- Add exclusions to Library Profile to exclude from upload
 - Any item with a unique and precise identifier with MARC tag and subfield can be excluded during the load
 - Example: 007 = 'h' for microform

Standard exclusion statement (added to all library profiles):

- Online resources: Exclude all "electronic resource" (245|h) OR "electronic books" (650|a or 655|a) OR "online resource" (338|a).
- Non-lending Physical Objects: Exclude all "realia" (245|h) OR "object" (338|a).

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5. Be a detective with the Request History

Wonder where that request is you sent out two weeks ago? Should you Approve a Retry or not?



Check the Request History!

The system generates a history for each ILL request to track the progress of the request from the time it was created until the material has been returned to the lender, or, for non-returnables, until the borrower receives the item.

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Be a detective with the Request History

Each entry records:

- The **code for the library** that initiated the change in status.
- The user name of the **library** who initiated the change.
- The **date and time of the change in status**.
- The **current status** of the request.
- A **Notes section** that lists the lender's reason or condition for the associated status change, followed by any **History Notes** associated with the request.
 - Changes to an ILL request
 - Reason for rejection
 - Special instructions and/or specific formats requested

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Be a detective with the Request History

History Information



10. PEMPL,PEMPLILL
Change: 3/27/2018 5:22:14 PM, Returned
9. PEMPL,PEMPLILL
Change: 3/8/2018 11:03:45 AM, Received
8. PBEML,pbemill
Change: 2/28/2018 4:32:03 PM, Shipped
7. PUSCP,ILLPM
Change: 2/26/2018 10:32:23 AM, Will not Supply
Notes: Reason or condition: In use, on loan.
6. System,ISOLink
Change: 2/26/2018 10:11:49 AM, Sent to external responder
Notes: ILLRequest will be sent to external ISO trading partner: OCLC:CPL
5. PREPL,PREPLILL
Change: 2/26/2018 10:11:13 AM, Will not Supply
Notes: Reason or condition: In use, on loan.
4. PMTLB,ILLPM
Change: 2/23/2018 2:04:23 PM, Will not Supply
Notes: Reason or condition: In use, on loan.
3. System,ISOLink
Change: 2/19/2018 4:26:02 PM, Sent to external responder
Notes: ILLRequest will be sent to external ISO trading partner: OCLC:CPL
2. PEMPL,Lender Processor
Change: 2/19/2018 4:25:09 PM, Add Lenderlist
1. PEMPL,pempill
Change: 2/19/2018 4:25:08 PM, Awaiting Lenders
Notes: Created from record no. ACCESSPA_UDB:582841 by staff

Current Lender's Note

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6. Read ALL the Notes!

Did you request a Large Print book, but libraries are sending other editions?

Even if you select a bib record for large print format, if none of the holding libraries on that record fill your request, it may move on to ***another record***.



Solution: Add a note stating “**Large Print only, please!**”

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Read ALL the Notes!

The **Note icon (push pin)** in the **Pending Status Browse List** indicates the borrower included a note when initiating the request. Borrowers can also add a note after initiating a request and the pushpin will show up, so be sure to check ***at each step of processing the request***.



	Title
	
 →	<u>The brutal telling</u>

To view the note, click the title to open the **Full Record Display**. The **Borrower's Notes** field is just below the two blue arrow icons in the middle of the display.

Date Shipped	<input type="text" value="4/26/2016"/>	
Due Date	<input type="text" value="5/17/2016"/>	
Borrower's Notes	 <input type="text" value="Large print, only! Can I keep until May 31, please?"/>	

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7. Oops! I didn't mean to do that.

- "I'm filling in for our usual ILL staff member and I made a mistake; I clicked **Check In** and inadvertently updated the status of an item we had lent to another library to **Complete**."

Solution: Contact the borrowing library and ask them to send it back when they're done. Write yourself or your staff a note so that you'll remember why this isn't in SHAREit when it does come back.

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Oops! I didn't mean to do that.

- "I accidentally hit **shipped, non returnable**. The ILL assistant from the borrowing library called me to let me know and asked if I could hit **undo Shipped**. When I did, I received an error message."

Solutions: When **Shipped (non-returnable)** is selected, the request will immediately go into the status of **Complete** when the borrower receives it because SHAREit assumes the item does not need to be returned. This status cannot be changed by the lender or borrower.

- **Lenders:** if you notice you selected the wrong shipping action, send a note to the borrower with the item and include the due date. Non-returnables do not have due dates, and the request will go into the **Complete** status as soon as the borrower actions it **Received**.
- **Borrowers:** if you receive a request that goes into the **Complete** status immediately when actioned **Received**, notify the lender and ask for the due date.

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8. Completing the request

Once a borrowing library returns a book, they count on the lending library to action the **Check in** status so that the request:

- ends up in the **Complete** status indicating no further actions are required by either partner
- will be automatically deleted after 5 days, OR
- will be available to manually change the status to **Delete**, in which case the request will be flagged with a trash can icon and deleted during overnight processing.

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Completing the request

We sometimes receive requests to clear out a library's **Returned** list by **checking in** items, however, we will only do this if the request comes from the **Lending** library, confirming that the items have been returned.

Title	Pub Date	Req. No.	Borrower	Status
The brutal telling.	2009.	1998	PCAPL (TRAINING Carbondale Public Library)	Returned Returned Check In Lost

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9. Get the statistics you need

Statistics...for Numbers	Reports...for Titles
Activity and Request Reports:	Activity and Request Reports:
<ul style="list-style-type: none"> Borrowing/Lending Activity (includes borrower/lender name) 	<ul style="list-style-type: none"> Request Records (includes lender name)
<ul style="list-style-type: none"> Net Activity (includes borrower/lender name) 	<ul style="list-style-type: none"> Lender Response Records (includes lender name)
Borrower/Lender Statistics	CONTU Copyright Tracking
Borrower/Lender Record Counts	Stayed Too Long Report
Borrower Days to Receive/Lender Days to Supply	

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Get the statistics you need

➤ Activity and Request Reports

Report on activity *based on the origination date of the request; may be inconsistent* from day to day until all activity on the request has ceased.

➤ Borrower Statistics and Lender Statistics

Report on actions taken during specified time period; *do not change over time.*

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Net Activity for Annual Report

Your ILL activity within Access PA *and* with each trading partner

Net Activity = Lending – Borrowing

Net Borrower	Borrows more than lends	Negative value
Net Lender	Lends more than borrows	Positive value
Balanced Borrower/Lender	Equal borrowing and lending	0

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Item disappeared from your Request Manager?

Usual reasons:

- Complete: deleted after 5 days
- Mistakenly actioned as Shipped (non-returnable)

Report available in Excel	Borrower	Lender
Activity and Request Reports:		
• Request Records	√	
• Lender Response Records		√

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10. SHAREit Tip of the Week

February 27, 2018



In the Digital Spotlight: Philadelphia Flower Show Collection

The annual Philadelphia Flower Show which benefits the programs of the Pennsylvania Horticultural Society (PHS) has been an annual rite of spring in the city since 1929. This year's show runs from March 3 through 11 at the Pennsylvania Convention Center.

The PHS McLean Library houses an extensive collection of horticultural materials as well as the PHS archives. PA Photos and Documents is one of several digitization efforts which the library has partnered with to make its older archival material more widely accessible to researchers. Its Philadelphia Flower Show Collection consists of documents related to the Philadelphia Flower Show from 1929 to the present including tickets, advertisements, posters and high-quality photographs to exhibits and promotional events. Some of the images include buildings that no longer exist, such as Philadelphia's Commercial Museum and the Civic Center.

SHAREit Tip of the Week – Forgot Your Password?

If you haven't logged into SHAREit in a while and are having trouble, be sure to:

- 1 select your library from the list
- 2 enter your username, your 5-character code followed by "ill" – sabcdill
- 3 enter your password

If you forgot your password, try the Forgot Your Password function. To use it, make sure your library name is selected, enter your username in the new Username field that opens, and click Submit.

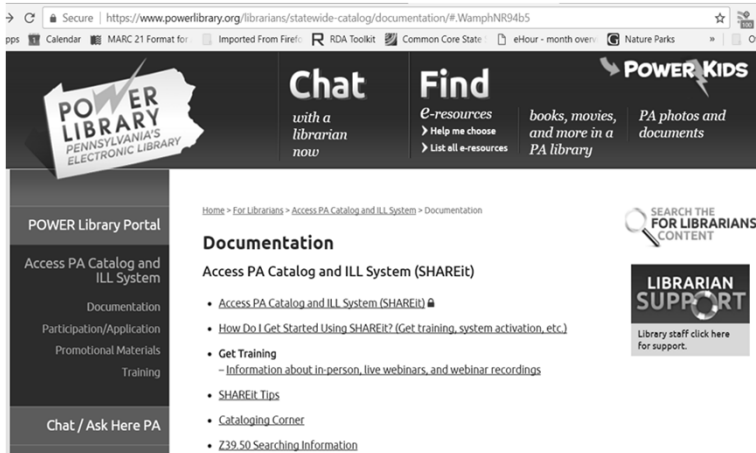
Remember Me? Forgot Your Password?

If you get a message that there is not an email address on file, contact support@hslc.org.

For more help, see System Login, posted under Getting Started (If prompted for a password, contact support@hslc.org) and the Password Management tip.

Subscribe to biweekly tips/updates with the Access PA News and see previous issues here: <https://www.powerlibrary.org/librarians/library-news/access-pa-news/>

More tips and documentation



The screenshot shows a web browser window with the URL <https://www.powerlibrary.org/librarians/statewide-catalog/documentation/#.WamphNR34b5>. The page features a navigation menu with 'POWER Library Portal', 'Access PA Catalog and ILL System', 'Documentation', 'Participation/Application', 'Promotional Materials', 'Training', and 'Chat / Ask Here PA'. The main content area is titled 'Documentation' and lists links for 'Access PA Catalog and ILL System (SHAREit)', 'How Do I Get Started Using SHAREit?', 'Get Training', 'SHAREit Tips', 'Cataloging Corner', and 'Z39.50 Searching Information'. A 'LIBRARIAN SUPPORT' button is also visible.

Ask support for password for the protected documentation section.

Organized in categories

https://www.powerlibrary.org/librarians/statewide-catalog/documentation/shareit-tips/#ParticipantRecord

MARC 21 Format for Imported From Firefo RDA Toolkit Common Core State eHour - month over

Chat
with a librarian now

Find
e-resources
Help me choose
List all e-resources

books, movies, and more in a PA library

Home > For Librarians > Access PA Catalog and ILL System > Documentation > SHAREit Tips

SHAREit Tips

Please review the categories to discover tips on using SHAREit.

- + General Information
- + Searching
- + Participant Record
- + ILL Processing
- + Statistics

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Tips respond to FAQs

https://www.powerlibrary.org/librarians/statewide-catalog/documentation/shareit-tips/#ParticipantRecord

MARC 21 Format for Imported From Firefo RDA Toolkit Common Core State eHour - month over

Please review the categories to discover tips on using SHAREit.

- + General Information
- + Searching
- Participant Record
 - [It's Your Participant Record](#)
 - [Ship To Fields](#)
 - [Add Your IDS Number](#)
 - [Setting Holiday Dates](#)
 - [Setting Email Notifications](#)
 - [Complete Your Lending Policy!](#)
 - [Lending Policy Check-Up Time](#)
 - [Setting Due Dates](#)
 - [To Renew or Not Renew?](#)
 - [Using NA vs. N in Your Lending Policy](#)
 - [Information Only Policies](#)

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Tips are easy and quick to read

[Home](#) > [For Librarians](#) > [Access PA Catalog and ILL System](#) > [Documentation](#) > [SHAREit Tips](#) > [SHAREit Tip – Add Your IDS Number](#)

SHAREit Tip – Add Your IDS Number

Does your library use IDS, the Interlibrary Delivery Service of Pennsylvania? If yes, remember to add the IDS number for your library in front of your library's name in the Ship To section of your Participant Record, e.g., IDS 123 Library Name.

Here's how Penn State's looks in their Participant Record:

Ship To Name:
(80 characters max)

Adding your IDS number ensures that other IDS libraries will be able to properly ship items to you.

Not a member of IDS? Learn all about it at www.idspa.org.

[Return to Tips Categories page](#)

...and are super helpful

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...and repeat at strategic intervals

- **Setting Holiday Dates** just before the winter holidays
- **Password Management** after the long summer holiday
- **Encourage completion of Participant Record:**
 - **It's your Participant Record**
 - **Complete your lending policy!**
 - **Lending policy checkup time**

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Questions?

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Access PA Catalog and ILL System
accesspa.powerlibrary.org
support@hslc.org

This project is made possible in part by Library Services and Technology Act (LSTA) funds from the U.S. Institute of Museum and Library Services and through Library Access funds administered by the Office of Commonwealth Libraries, Department of Education, Commonwealth of Pennsylvania, Tom Wolf, Governor. The views, findings, conclusions, or recommendations expressed in this website do not necessarily represent those of the U.S. Institute of Museum and Library Services or the Department of Education, Commonwealth of Pennsylvania.

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