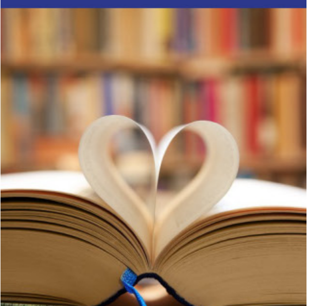
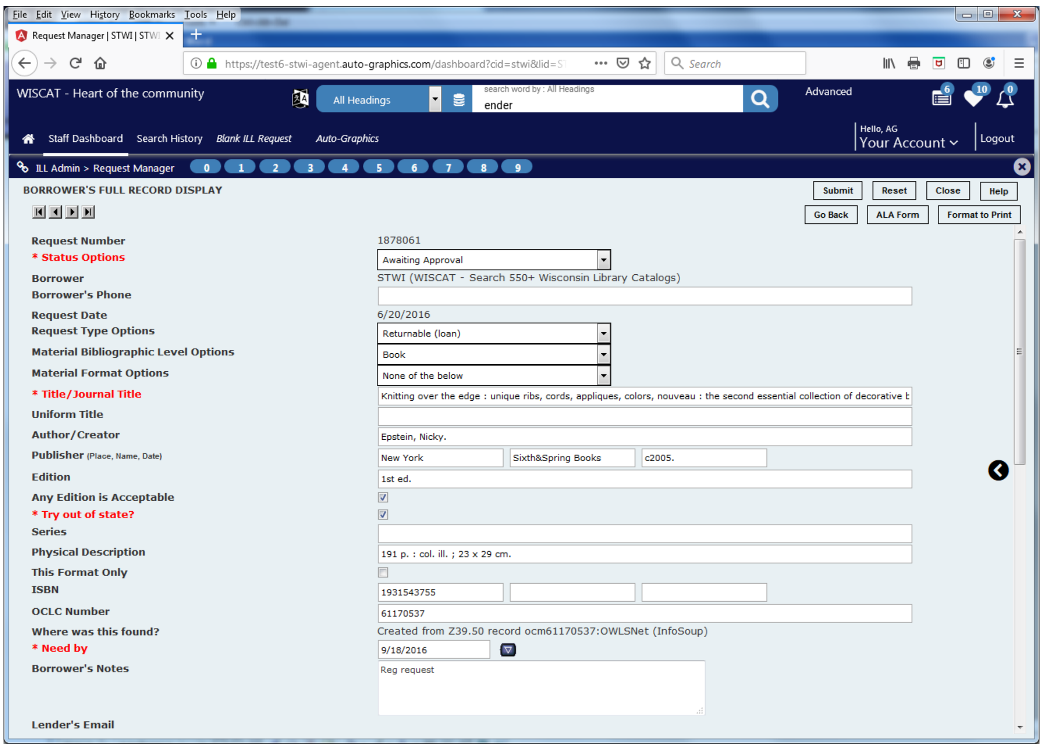


SHAREit®



User Guide

ILL Administration

Version 6.0

auto-graphics

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Chapter 1. INTRODUCTION

Overview

This User Guide is designed to provide a working understanding of the features and functions of ILL Administration. ILL Administration is an online application that provides library administration and staff members with the means to generate, track, and process interlibrary loan requests between trading partners within and outside of their library's consortium.

ILL Administration features and functions are divided into four categories: Status Browse, Lender, Borrower, and System Administration. Status Browse lets you process and track *all* active and completed interlibrary loan requests for your library (both as a borrower *and* as a lender). Borrower functions let you create, process and track interlibrary loan requests your library has *submitted to* other libraries. Lender functions let you process and track interlibrary loan requests your library has *received from* other libraries. System Administration functions allow Library and System Administrators to generate and maintain user (staff and patron), participant (lender institution) and System Wide records.

The system maintains historical data related to the processing of interlibrary loan requests. Library staff can recall this data through the Statistics module (see the ***Statistics User Guide*** for details). Analysis of the statistical data can be used to assess the efficiency with which interlibrary loan requests are processed.

Using ILL Administration, library staff can:

- Generate, process, and track interlibrary loan requests you have submitted as a borrower
- Receive, process, and track interlibrary loan requests you have received as a lender

Using ILL Administration, Library and System Administrators can:

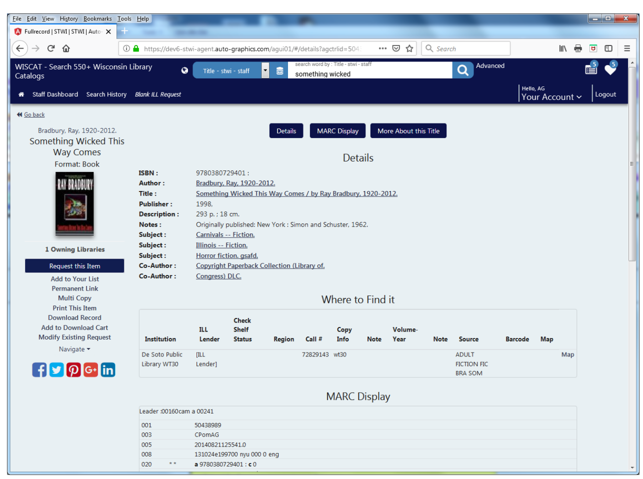
- Generate and maintain a participant record for each member library
- Generate and maintain the System Wide record for all member libraries
- Generate and submit interlibrary loan requests as a borrower
- Receive, process, and track interlibrary loan requests you have received as a lender

The Staff Functions Menu

The Staff Functions menu is shown on *all* Full Record Displays. The menu provides access to features and functions available with ILL Administration.

To use the Staff Functions menu:

- Features and functions related to ILL Administration available through the Staff Functions menu are described below:
  - **Multi-Copy** - Lets you generate multiple ILL requests for the currently active title (see ***Special Considerations for Multi-Copy Requests*** on page **23** for more information).



Staff Functions Menu

- ○ **Modify Existing Request** – In cases where a bibliographic record associated with an ILL request is not for the correct item, lets you modify the ILL request to associate the request with an alternate bibliographic record appropriate for the item being requested.

The ILL Admin Menu

The **ILL Admin** menu provides access to features and functions related to administration of interlibrary loan activities for your library.

ILL Admin Menu

To access the ILL Admin menu:

1. Click the **Staff Dashboard** link on *any* screen in the Search interface.
   - The Staff Dashboard screen displays. The Dashboard displays *all* staff menus available for your user account.
2. The **ILL Admin** menu provides access to the following options:
   - **Request Manager** - lets you view in-process ILL requests you have submitted *as a borrower* or received *as a lender*, by status category; and provide responses, as appropriate, to the trading partners.
   - **Borrower** - displays a submenu of features and functions for managing and processing ILL requests you have submitted *as a borrower*.
     - ○ **Title Browse** - lets you browse a list of *all* active and completed ILL requests you have submitted *as a borrower*, by the title of the item requested.
     - ○ **Request Number Search** - lets you locate the Full Record Display for a *specific* ILL request you have submitted using the *system-assigned* Request Number.
     - ○ **Global Request Search** - lets Customer SuperUsers locate the Full Record Display for a *specific* ILL request submitted by *any library* in a consortium or collective using the *system-assigned* Request Number.

       *The **Global Request Search** option is shown in place of **Request Number Search** for Customer SuperUsers only.*
     - ○ **Patron Browse** - lets you browse a list of *all* active and completed ILL requests you have submitted *as a borrower*, by the name of the patron who requested the material.
   - **Lender** - displays a submenu of features and functions for managing and processing ILL requests you have received *as a lender*.
     - ○ **Title Browse** - lets you browse a list of *all* active and completed ILL requests you have received *as a lender*, by the title of the item requested.
     - ○ **Request Number Search** - lets you locate the Full Record Display for a *specific* ILL request you have received using the *system-assigned* Request Number.

  - **Global Request Search** - lets Customer SuperUsers locate the Full Record Display for a *specific* ILL request received by *any library* in a consortium or collective using the *system-assigned* Request Number.

    *The **Global Request Search** option is shown in place of **Request Number Search** for Customer SuperUsers only.*

- **Participant Record** - lets you create and maintain a Participant Record for each trading partner in your library's consortium, containing ILL policies, contact information, etc., necessary to ensure proper handling of interlibrary loan activities.
- **Blank Request Form** - lets you prepare and submit an interlibrary loan request.
- **ALA Form** – click to download a blank "fillable" ALA Form in PDF format.
- **System Wide Record** - lets you establish system-wide defaults for *all* participant libraries in the consortium (this function is available to System Administrators *only*).
- **Print Shipping Labels** - lets you review and print shipping labels for ILL items.

  *The **Print Shipping Labels** feature is optional, and may not be enabled for all consortia.*

- **Print Bookstraps** - lets you review and print bookstraps for ILL items.

  *The **Print Bookstraps** feature is optional, and may not be enabled for all consortia.*

- **Batch Holiday Lists** - lets Customer SuperUsers perform batch updates to the Holiday Lists for multiple selected libraries.

  *The **Batch Holiday Lists** option is available to Customer SuperUsers only.*

- **Search Library Information** - lets you view lending policies and reference information for any library within your library's consortium.
- **ILL Request Limits** - lets you establish and maintain limits on the number of simultaneous *active* ILL requests allowed for a given authenticated patron based on Patron Category assignment.

  *The **ILL Request Limits** feature is optional, and may not be enabled for all consortia.*

- **Patron Tracking** - lets you configure labels and message content for the Patron Request Tracking feature available to library patrons and guests through the Search module.
- **Configuration** - displays a submenu of features and functions for configuring forms, displays and bookstraps for your system:
  - **Configure Request Manager** - lets Customer SuperUsers set the order in which statuses are listed in the Request Manager.

    *The **Configure Request Manager** option is available to Customer SuperUsers only.*

  - **Configure Bookstraps** - lets you select the *specific* information to be included on printed bookstraps for ILL items.

    *The **Configure Bookstraps** feature is optional, and may not be enabled for all consortia.*

  - **Configure Pick List** – lets you select the *specific* information to be shown for each request in printed Pick Lists, and configure the **Pick List** function to print either new requests *only*, or both new *and* previously printed requests.

    *The **Configure Pick List** function is available to Library SuperUsers only (see the **PAC Administration User Guide**).*

- **Configure Request Form** - lets you specify the *specific* fields to be included in the ILL Request Form and Blank Request Form for *borrow* requests and *copy* requests, set the order in which the specified fields are listed, assign *local* labels to *selected* fields, and configure selected fields as *mandatory*.
- **Configure Loan Full Record Display** – lets you specify the *specific* fields to be included in the Full Record Display for *borrow* requests, set the order in which the specified fields are listed, assign *local* labels to *selected* fields, and configure selected fields as *mandatory*.

  Customer SuperUsers establish the "default" request forms for all libraries within a consortium. Library SuperUsers may modify the "default" forms (with limitations) to suit local needs.

- **Configure Copy Full Record Display** – lets you specify the *specific* fields to be included in the Full Record Display for *copy* requests, set the order in which the specified fields are listed, assign *local* labels to *selected* fields, and configure selected fields as *mandatory*.

  Customer SuperUsers establish the "default" request forms for all libraries within a consortium. Library SuperUsers may modify the "default" forms (with limitations) to suit local needs.

- **Set Workstation Printer** – lets you specify the workstations printer(s) to be used when printing barcodes on an Avery 6464 label for libraries that print adhesive routing labels). See the ***System Basics User Guide*** for details.

3. Click the button to return to your library's "Home" page.

Organization of the User Guide

This User Guide is designed to provide an overview of the features and functions of ILL Administration. The User Guide is divided into eight chapters, as follows:

Chapter 1 – INTRODUCTION. This chapter describes the features and functions available through the Staff Functions menu shown on all Full Record Displays and **ILL Admin** menu available through the **Staff Dashboard**.

Chapter 2 – INTERLIBRARY LOAN REQUESTS. This chapter provides the procedures to prepare and submit interlibrary loan requests using the ILL Request Form, the Blank Request Form, Reference Requests, Multi-copy Requests, and 3rd Party Requests.

Chapter 3 – STATUS BROWSE. This chapter provides the procedures to monitor and process interlibrary loan requests your library has submitted to other participant libraries *as a borrower* and interlibrary loan requests your library has received from other participant libraries *as a lender*, based on the current status of the request.

Chapter 4 – BORROWER FUNCTIONS. This chapter provides the procedures to monitor and process interlibrary loan requests your library has submitted to other participant libraries *as a borrower*.

Chapter 5 – LENDER FUNCTIONS. This chapter provides the procedures to monitor and process interlibrary loan requests your library has received from other participant libraries *as a lender*.

Chapter 6 – THE PARTICIPANT RECORD. This chapter provides the procedures to maintain participant records for each member library in your consortium.

Chapter 7 – SYSTEM ADMINISTRATION FUNCTIONS. This chapter provides the procedures to establish System Wide defaults and perform other administrative functions.

Chapter 8 – SHIPPING LABELS AND BOOKSTRAPS. This chapter provides the procedures for maintaining and printing shipping labels and bookstraps, and for processing ILL requests using the barcodes provided on shipping labels and bookstraps.

Chapter 9 – CUSTOMER SUPERUSER. This chapter provides the procedures to configure the default ILL Request Forms, configure the Request Manager, perform a Global Request Search, and maintain batch Holiday Lists.

Optional Features

RESEARCHit, SHAREit and VERSO are modular in design, and offer libraries a high degree of flexibility in configuring the systems to suit the specific needs of their patrons and staff members. The “basic” RESEARCHit module can be enhanced by adding staff-level functionality to support User Administration and user authentication, PAC Administration, Cataloging and Authority Control, Union Database Management, Statistics, UX Administration and/or ILL Administration (SHAREit). The “basic” VERSO Search and Circulation modules can be enhanced by adding staff-level functionality to support User Administration and user authentication, PAC Administration, Cataloging and Authority Control, Serials and Acquisitions management, Statistics, UX Administration and/or ILL Administration (SHAREit). Additionally, a number of optional features and functions are available within each module.

This manual provides instructions covering all features and functions available through ILL Administration. Depending on the specific configuration of the system for your library, some features and functions may not be available to you. For information on enabling optional features and functions for your library, contact Auto-Graphics, Sales and Marketing.

Chapter 2. INTERLIBRARY LOAN REQUESTS

Overview

Four options are provided for generating interlibrary loan requests:

- **ILL Request Form** - used when a bibliographic record for the desired title is available
- **Blank Request Form** - used when no bibliographic record for the desired title can be found
- **Reference Request Form** - used to submit reference or information questions
- **3rd Party Request** - used when the consortium uses a 3rd party Resource Sharing ILL system

Both the Blank Request Form and the ILL Request Form can be used to create multi-copy requests that generate multiple ILL requests from one request form. Interlibrary loan requests can be initiated by library staff and, if authorized, by library patrons (see the ***Search User Guide*** (for RESEARCHit or VERSO, as applicable) for details).

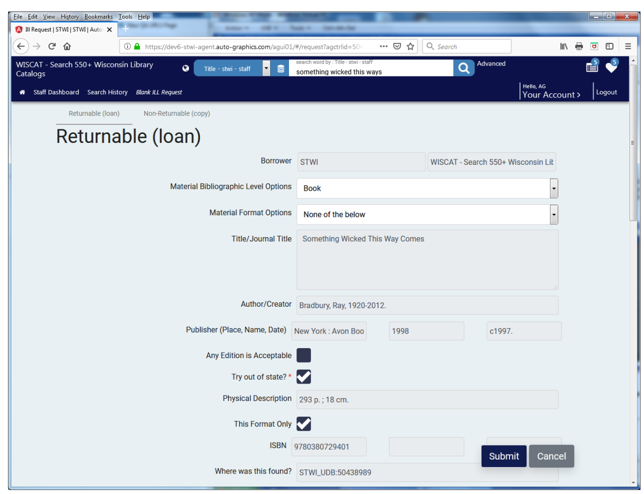
This chapter provides the procedures to:

- Prepare and submit an interlibrary loan request using the ILL Request Form
- Prepare and submit an interlibrary loan request using the Blank Request Form
- Prepare and submit multi-copy requests
- Prepare and submit a reference request
- Prepare and submit a 3rd Party Request to an external ILL system

Using the ILL Request Form

The ILL Request Form lets you prepare and submit an ILL request from a specific bibliographic record. The **Request this item** icon is found on Brief Browse Lists. The **Request This Item** button is found on Full Record Displays. Bibliographic information from that record is entered automatically at the top of the form. The system uses the current calendar date as the request date.

*For "electronic content" records, display of the **Request This Item** button is suppressed. To support cases where a library may wish to copy or print articles or chapters from "electronic content" titles to supply to a patron as "hard copy," the **Staff Function** menu on the Full Record Displays for such titles includes a **Request This Item** option to support such requests.*



ILL Request Form

Fields identified by a red asterisk (*) are mandatory and must be filled in. All other fields are optional.

To prepare the ILL Request Form:

1. Access a Brief Browse List containing the desired item or the Full Record Display for the desired item.

2. Click the (**Request this item**) icon (from a Brief Browse List) or the **Request This Item** button (from a Full Record Display) for the title you wish to borrow.

   *The **Request this item** icon may not be available for items of certain formats or materials types.*

   - **For libraries using the *standard* Request This Item function:** the system searches *the current bibliographic record* for potential lenders.
   - **For libraries using the *enhanced* Request This Item function:** After the request has been submitted (i.e., has a Request Number), the system searches all valid databases and Z targets for potential lenders for the title. If the library has selected the optional features, the system also checks the library's Lending Policies and Item Availability for the first potential lender prior to building the lender list. If the lender does not lend items of the requested material type, or, if the requested item is not *currently* available, the lender is not added to the **Lender List**. When all potential lenders have been identified, the system adds the Library Codes to the Lender List for the associated request.

3. When the search for ILL lenders is complete:

   *For systems utilizing optional SIP2 functionality, the Select a Patron screen displays (see **Using Select a Patron (SHAREit/SIP2 Authentication)** on page **21** for details). The desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*

   - The ILL Request Form displays.
   - Bibliographic information for the title you wish to obtain is pre-filled by the system. The system uses the current calendar date as the request date.
     - **For libraries using the *standard* Request This Item function:** If the title is *not* held by a library registered as a potential lender for your library, the message "None of the other libraries holding this item is currently registered as a potential lender for your library. Do you wish to continue?" displays. Click the **Yes** button to continue with the request. Click the **No** button to close the message and return to the previous Full Record Display.

   If the title you wish to borrow is owned by your library (the library under which you logged in) and *your library has enabled "owned by this library" notification, the message "The item you're requesting is owned by your library. Please check on its availability before submitting this request." displays at the top of the ILL Request Form. You should check to see if the item you wish to obtain is available before submitting the ILL request.*

4. Enter the required information in the form fields (see ***ILL Request Form Fields*** on page **15** for more information).

   - If your library has enabled ILL Request Limits, it is recommended that you use the Patron Lookup function (see ***Using Patron Lookup (SHAREit Authentication only)*** on page **20** for details) to select the desired patron to ensure that any ILL Request Limit placed on the patron is not inadvertently exceeded. If a patron selected using the Patron Lookup function has reached the specified ILL Request Limit, an advisory dialog displays the message "(*patron name*) has exceeded the ILL request limits (*request limit*). Do you want to override the limit and proceed with the request?"

     *The **Patron Lookup** function is available only for system utilizing the User Administration module as the only means to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed (see **Using Select a Patron (SHAREit/SIP2 Authentication)** on page **21** for details).*

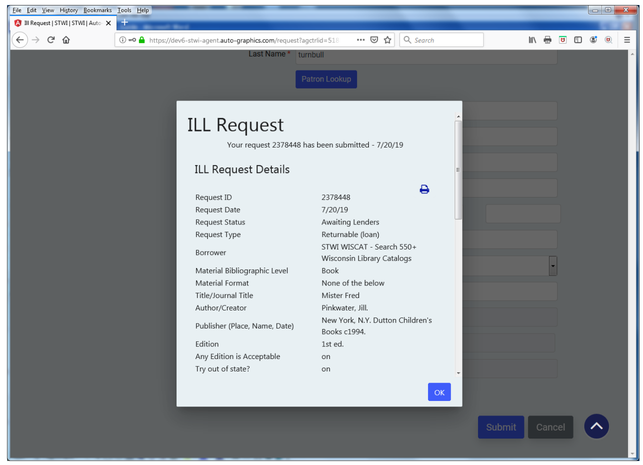
     - Click the **OK** button to override the limit and proceed with the request.
     - Click the **Cancel** button to cancel the request.

5. Click the **Submit** button to submit the ILL request.

   - If your interlibrary loan request is *unsuccessful*:

- ○ If you enter incomplete information in the ILL Request Form, a message dialog displays indicating the required information.
- ○ Click the **OK** button on the message dialog to return to the ILL Request Form. Enter the required information and click the **Submit** button to resubmit the request.

- If your interlibrary loan request is *successful*:
  - ○ A confirmation dialog displays.
- If desired, you can print a copy of the request (see ***Printing the ILL Request Confirmation*** on page **22** for details).
- Click the **OK** button to close the confirmation dialog and return to the previous Full Record Display.



ILL Request Confirmation Screen

ILL Request Form Fields

The following table lists all available fields for the ILL Request Form and Blank Request Form in alphabetic order, and provides instructions for completing each field.

The default ILL Request form fields are established by Customer SuperUser for your consortium or collective. The specific content and arrangement of the ILL Request Form and Blank Request Form for your library are established by your Library SuperUser. Some fields may not be included in the request forms for your library. Additionally, your library may use alternate names for some fields.

ILL Request Form Fields

Form Field	Description
Any Edition is Acceptable (checkbox)	Use this field to indicate whether or not an edition of the title *other than* the edition specified may be supplied when filling the request. A checkmark ☑ indicates *any edition* may be supplied when filling the request. An empty checkbox ☐ indicates that only the *edition specified* may be supplied when filling the request. Clicking the checkbox repeatedly will toggle it on and off. The default state of the **Any Edition is Acceptable** checkbox is established in the Participant Record for your library. *This field is applicable to* ***Returnable (loan)*** *requests only.* The **Any Edition is Acceptable** field is informational only. It does not affect the lender build process, or aid in determining whether or not a request should be forwarded to a specific lender.
Article Author (text box)	Enter the name of the article's author. *This field is applicable to* ***Non-returnable (copy)*** *requests only.*
Article Date (text box / drop-down menus)	Enter the year of publication for the article in the **Year** text box. Use the **Month / Season** and **Day** menus to select the appropriate values for the **Article Date**. The publication **Year** is mandatory; the **Month / Season** and **Day** fields are optional. *This field is applicable to* ***Non-returnable (copy)*** *requests only.*
Article Information (Volume, Issue, Pages) (text boxes)	Enter the **Volume** number and **Issue** number, as appropriate, of the publication containing the requested article, and enter the **Pages** you wish copied. The **Pages** field is mandatory; the **Volume** and **Issue** fields are optional. *This field is applicable to* ***Non-returnable (copy)*** *requests only.*

Form Field	Description
Article Title (text box)	Enter the title of the article to be copied. *This field is applicable to* ***Non-returnable (copy)*** *requests only.*
Author/Creator (text box)	Enter the name of the author or creator of the requested title. For requests created from a Full Record Display, this information is pre-filled by the system.
Borrower (read-only field / drop-down menu)	This field shows the library code and name of your library. For systems employing Network Lender functionality, this field includes a drop-down menu for selection of the appropriate borrowing library.
Borrower's Notes (text box)	Enter any text or other instructions meant for the lending library. **Borrower's Notes** may be 500 characters *maximum*, including spaces.
Customer Field 1	Content for the **Customer Field 1** is locally defined.
Customer Field 2	Content for the **Customer Field 2** is locally defined.
Customer Field 3	Content for the **Customer Field 3** is locally defined.
Customer Field 4	Content for the **Customer Field 4** is locally defined.
Customer Field 5	Content for the **Customer Field 5** is locally defined.
Customer Field 6 (checkbox)	Content for the **Customer Field 6 (checkbox)** is locally defined.
Edition (text box)	Enter the edition of the requested title. For requests created from a Full Record Display, this information is pre-filled by the system as appropriate.
ISBN (text box)	Enter the International Standard Book Number (ISBN) for the requested title, if appropriate. For requests created from a Full Record Display, this information is pre-filled by the system as appropriate.
ISSN (text box)	Enter the International Standard Serial Number (ISSN) for the requested title, if appropriate. For requests created from a Full Record Display, this information is pre-filled by the system as appropriate.
Lender List (text box)	Enter *at least* one lender in the **Lender List**; on separate lines. Include the Library Code, days to respond and call number for each library to which you wish to submit the request. Separate the Library Code, days to respond, call number and System Number with commas; *do not* include spaces. If desired, you can use the **Locate Lender** function to add lenders to the **Lender List**. The Library Code for at least one lender is *mandatory*. All other information is *optional*. When entering a Library Code only, *be sure* to include a comma following the code. See ***Special Considerations when Editing the Lender List*** on page **64** for more information. *The* ***Lender List*** *is not included on the initial request form for systems using SSS.*
Library of Congress Control Number (text box)	Enter the Library of Congress Control Number (LCCN) for the requested title, if appropriate. For requests created from a Full Record Display, this information is pre-filled by the system as appropriate.
Material Bibliographic Level Options (drop-down menu)	Select the desired material type for the requested item. (For **Returnable (loan)** requests, **Book** is the *default* selection for this field. For **Non-returnable (copy)** requests, **Serial** is the *default* selection for this field.)
Material Format Options (drop-down menu)	Select the desired material format for the requested item. (**None of the below** is the *default* selection for this field.)
Max Cost (text box)	In some cases, a lending library will charge a loan or photocopy fee to provide the requested item. Enter the *maximum* the patron is willing to pay if such a fee is charged. *The default value for this field is "0.00."*
Need by (text box)	The system enters a *default* **Need by** date a specified number of days from the *current* calendar date (the number of days is determined by your library). If you wish to change the default **Need by** date, click the icon to use the Date Entry Calendar to select the date by which you need the item.

Form Field	Description
Number of Copies Needed (over 1 creates multiple requests) (text box)	To submit requests for *more than one copy* of the title (to generate *multiple* ILL requests), enter the desired number of copies. See ***Special Considerations for Multi-Copy Requests*** on page **23** for more information. *This field is applicable to **Returnable (loan)** requests only. This field is not shown on the Blank Request Form (see **Using the Blank Request Form** on page **22** for details).*
OCLC Number (text box)	Enter the OCLC Number (if known) for the requested title. For requests created from a Full Record Display, this information is pre-filled by the system as appropriate.
Other Standard Identifier (text box)	Enter the UPC Code (if known) for the requested title. For requests created from a Full Record Display, this information is pre-filled by the system as appropriate.
Patron's Address 1 (text box)	Enter the patron's street address. If desired, you can use the **Patron Lookup** feature to locate the desired patron and *automatically* fill this field with information taken from the patron's user record, as available. *The **Patron Lookup** function is available only for system utilizing the User Administration module to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*
Patron's Address 2 (text box)	Enter the patron's secondary address (such as an Apt. #), if applicable. If desired, you can use the **Patron Lookup** feature to locate the desired patron and *automatically* fill this field with information taken from the patron's user record, as available. *The **Patron Lookup** function is available only for system utilizing the User Administration module to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*
Patron's Address 3 (City, State, ZIP) (text boxes)	Enter the patron's city, state or Province, and ZIP or postal code. If desired, you can use the **Patron Lookup** feature to locate the desired patron and *automatically* fill this field with information taken from the patron's user record, as available. *The **Patron Lookup** function is available only for system utilizing the User Administration module to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*
Patron's Contact 1 (text box)	Enter the patron's primary contact method (email address, home phone number, cell phone number, etc.). If desired, you can use the **Patron Lookup** feature to locate the desired patron and *automatically* fill this field with information taken from the patron's user record, as available. *The **Patron Lookup** function is available only for system utilizing the User Administration module to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*
Patron's Contact 2 (text box)	Enter the patron's secondary contact method (email address, home phone number, cell phone number, etc.). If desired, you can use the **Patron Lookup** feature to locate the desired patron and *automatically* fill this field with information taken from the patron's user record, as available. *The **Patron Lookup** function is available only for system utilizing the User Administration module to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*
Patron's First Name (text box)	Enter the patron's first name. If desired, you can use the **Patron Lookup** feature to locate the desired patron and *automatically* fill this field with information taken from the patron's user record, as available. *The **Patron Lookup** function is available only for system utilizing the User Administration module to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*

Form Field	Description
Patron's Last Name (text box)	Enter the patron's last name. If desired, you can use the **Patron Lookup** feature to locate the desired patron and *automatically* fill this field with information taken from the patron's user record, as available. *The **Patron Lookup** function is available only for system utilizing the User Administration module to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*
Patron's Library Card Number (text box)	Enter the patron's library card number. If desired, you can use the **Patron Lookup** feature to locate the desired patron and *automatically* fill this field with information taken from the patron's user record, as available. *The **Patron Lookup** function is available only for system utilizing the User Administration module to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*
Patron's Middle Name (text box)	Enter the patron's middle name. If desired, you can use the **Patron Lookup** feature to locate the desired patron and *automatically* fill this field with information taken from the patron's user record, as available. *The **Patron Lookup** function is available only for system utilizing the User Administration module to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*
Patron's Payment Options (drop-down menu)	In some cases, a lending library will charge a loan or photocopy fee to provide the requested item. Select the patron's preferred method of payment if such a fee is charged.
Patron's Program and Course (text box)	If appropriate, enter the patron's "major" (such as "Physics" or "English").
Patron's Status and Year (text box)	If appropriate, enter the patron's "classification" (such as "Undergraduate" or "class of 2011").
Physical Description (text box)	Enter the appropriate physical description of the requested item. For requests created from a Full Record Display, this information is pre-filled by the system as appropriate.
Pickup Location Options (drop-down menu)	If desired, select the library location or branch from which the patron may pick up the item. *The default value for this field is determined by your library.*
Publisher (Place, Name, Date) (text boxes)	Enter the place of publication, publisher name, and/or date of publication, as appropriate. For requests created from a Full Record Display, this information is pre-filled by the system as appropriate.
Publisher Number	Enter the Publisher Number (if known) for the requested title. For requests created from a Full Record Display, the system enters the UPC code as appropriate.
Publisher Source	Enter the Publisher Source (if known) for the requested title. For requests created from a Full Record Display, the system enters the UPC code as appropriate.
Request Type Options (hyperlinks)	*When **Request this Item** is selected from a Brief Browse List of Full Record Display, the system determines the appropriate request type, **Returnable (loan)** or **Non-Returnable (copy)**, based on the item being requested, and displays the associated request form. In most cases, **Returnable (loan)** is the default selection. In cases where the requested item is a serial, periodical, or "electronic format" item, **Non-Returnable (copy)** is the default selection. The hyperlinks at the top of the form show the request type for the request. The ability for library guests/patrons to change the request type is optional, and may not be enabled for all systems.*

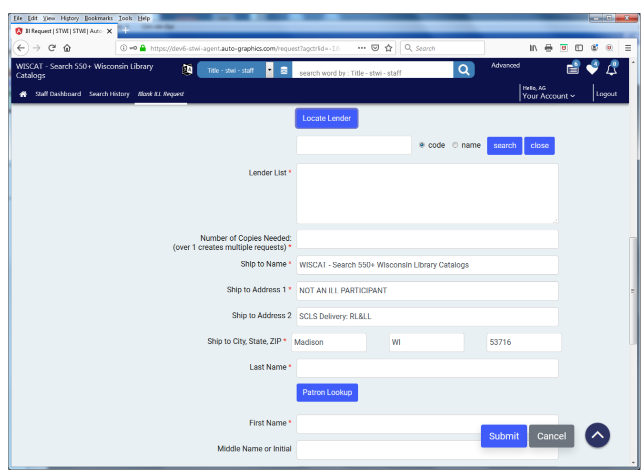
Form Field	Description
Request Type Options (hyperlinks) (cont)	Select **Returnable (loan)** for a borrow request; select **Non-Returnable (copy)** for a photocopy request. (**Returnable (loan)** is the *default* selection for this field.) If your library has enabled the “Copyright Confirmation” feature, a “Copyright Confirmation” message displays when you select **Non-Returnable (copy)** as the request type. You must acknowledge (accept) the Copyright Statement when submitting your copy request. Click the **Yes** button on the “Copyright Confirmation” message to accept the Copyright Statement and continue with the request. Click the **Cancel** button on the “Copyright Confirmation” message to cancel the request.
Series (text box)	If the title being requested is part of a series, enter the name of the series. For requests created from a Full Record Display, this information is pre-filled by the system as appropriate.
Show Date (text box)	If the item you are requesting is intended for use on a *specific date* (such as for a film, video or recording), click the icon to select the desired date. *This field is applicable to **Returnable (loan)** requests only.*
Source of Article Citation (text box)	Enter the citation of the article. This field is applicable to **Non-returnable (copy)** requests only.
This Format Only (checkbox)	Use this field to indicate whether or not an item of a format *other than* the currently selected **Material Format Options** may be supplied when filling the request. A checkmark indicates only the *format specified* may be supplied when filling the request. An empty checkbox indicates that *any* format may be supplied when filling the request. Clicking the checkbox repeatedly will toggle it on and off. This option is *deselected* by default. *This field is applicable to **Returnable (loan)** requests only.*
Title/Journal Title (text box)	Enter the title or journal title of the requested item. For requests created from a Full Record Display, this information is pre-filled by the system.
Uniform Title (text box)	Enter the uniform title of the requested item. For requests created from a Full Record Display, this information is pre-filled by the system as appropriate.
Volumes Needed (text box)	If the title you are requesting is a multi-volume title, list the specific volumes you wish to borrow. This field is applicable to **Returnable (loan)** requests only.

Locating ILL Lenders

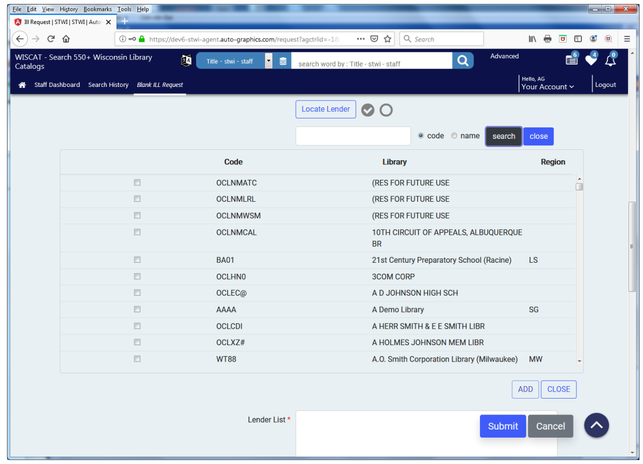
You can use the **Locate Lender** function to locate lenders within your consortium by either Library Code or library name.

To locate a lender:

1. Click the **Locate Lender** button above the **Lender List** on the Blank Request Form.
    - The Locate Lender search fields display.
2. Click the radio button appropriate to the type of search you wish to perform.
    - To search by library code, click the **code** radio button.
    - To search by library name, click the **name** radio button.
3. Enter your search criteria in the text box provided.



Locate Lender Search Screen



Locate Lender Search Results Screen

- You may enter a partial *or* complete Library Code or library name.

  To view all libraries registered in your library's database, leave the text box blank.

4. Click the **search** button.

   - A results screen displays listing all libraries that match your search criteria.
   - The screen includes the **Z Code** and **Region**, which may not be included if your consortium has not established Location Groups (see the ***PAC Administration User Guide*** for details).

5. Add lenders to the lender list as desired:

   - To clear *all lenders* currently in the **Lender List**, click the ○ icon.
     - The search results close, and all libraries are cleared from the **Lender List.**
   - To add *all lenders* in the search results to the **Lender List**, click the ✔ icon.
     - The search results close, and all libraries included in the search results are added to the **Lender List**.
   - To add *one or more* selected libraries to the **Lender List**:
     - Use the checkboxes to select the desired libraries. A *checkmark* ☑ indicates the associated library *will be* added to the **Lender List**. An *empty checkbox* ☐ indicates the associated library *will not be* added to the **Lender List**. Clicking a checkbox repeatedly will toggle it on and off.
     - When all desired libraries have been selected, click the **ADD** button to add the selected lenders to the **Lender List**.
     - The search results close, and the selected libraries are added to the **Lender List**.
   - To close the search results and search fields *without* adding lenders to the **Lender List**, click the **close** button.

Using Patron Lookup (SHAREit Authentication *only*)

*The **Patron Lookup** function is available for systems utilizing the SHAREit User Administration module as the only means to manage authenticated patrons (see the **User Administration User Guide** for more information). For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed (see **Using Select a Patron (SHAREit/SIP2 Authentication)** on page **21** for details).*

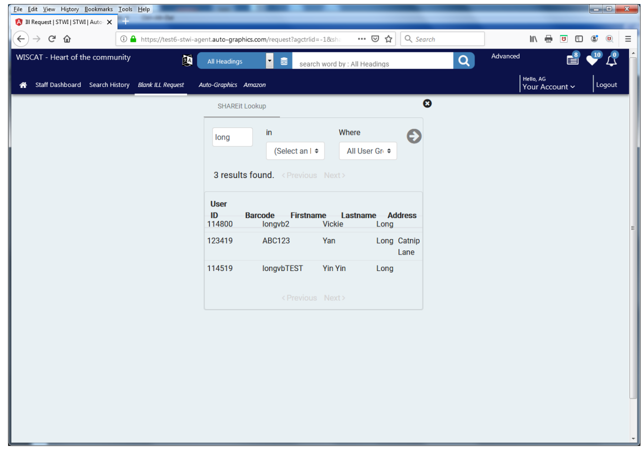
You can use the **Patron Lookup** function to *automatically* fill the patron information fields (**Patron Name**, **Library Card Number**, **Address**, **Phone**, **Fax** and **Email**) on the ILL Request Form or Blank Request Form.

To look up patron information:

1. On the ILL Request Form or Blank Request Form, enter the last name of the patron or staff member for whom the request is being prepared in the **Last Name** text box.

   *You may enter a complete or partial **Last Name**.*

2. Click the **Patron Lookup** button.
   - The Patron Lookup screen displays.
   - The Patron Lookup screen lists all users that matched your search criteria. The **Barcode** and **Address** are included.



Patron Lookup Screen

3. If desired, you can modify your query to search other fields in the user record:
   - Enter the term you wish to locate in the text box provided.
   - Select the index you wish to search from the **in** menu.
   - Select the user group to search from the **Where** menu.
     - To search *all* user groups, select **All User Groups** from the **Where** menu.
   - Click the button to submit your search.
     - The screen refreshes to display all users that matched your modified search criteria.
4. Click the desired patron.
   - The Patron Lookup screen closes, and information from the user record for the selected user is *automatically* entered in the **Patron Name (Last, First)**, **Library Card Number**, **Address**, **Phone**, **Fax** and **Email** fields, as appropriate.

Using Select a Patron (SHAREit/SIP2 Authentication)

*For systems utilizing the optional SIP2 functionality, the Select a Patron screen is displayed when the ILL request Form or Blank Request Form is accessed. The desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed. For systems utilizing the User Administration module as the only means to manage authenticated patrons (see the **User Administration User Guide** for more information) the **Patron Lookup** function can be used to locate the desired patron (see **Using Patron Lookup (SHAREit Authentication only)** on page **20** for details).*

When a patron is selected through the Select a Patron screen, the system will *automatically* fill the patron information fields (**Patron Name**, **Library Card Number**, **Address**, **Phone**, **Fax** and **Email**) on the ILL Request Form or Blank Request Form. You can select a patron from the SHAREit database or from the external SIP2 database.

To select a patron from the SHAREit database:

1. When you access the ILL Request Form or Blank Request Form, the Select a Patron screen displays.
2. Click the **SHAREit Lookup** tab.
   - The screen refreshes to display the SHAREit Lookup form fields.
3. Locate the desired patron:

   To return to the most recently accessed *patron account, click the **Current Patron** button.*

   - If desired, limit your patron search to a *specific* patron group by selecting the desired group from the **User's Group** menu.
     - Select **All Groups** to display users for *all* user groups.
     - Select the desired user group to display users for the associated group *only*.

- Enter the patron's barcode or last name in the **User's Barcode or Last Name** text box. To view a list of *all* users associated with the currently specified **User's Group**, leave the **User's Barcode or Last Name** text box *blank*.
  - When entering a patron name, you may enter a *complete* or *partial* last name.
- If desired, enter any *additional* search criteria (address, phone number, etc.) in the **and** text box, and select the appropriate search index from the **in** menu.

4. Click the **Search** button.
   - The Select a Patron screen refreshes to display a list of all users that matched your search criteria. The **Patron Barcode**, **Name**, **Address** and **Phone** number is included for each entry in the list.
5. Click the desired user.
   - The Select a Patron screen closes, and the request form displays. Information from the user record for the selected user is *automatically* entered in the **Patron Name (Last, First)**, **Library Card Number**, **Address**, **Phone**, **Fax** and **Email** fields, as appropriate.

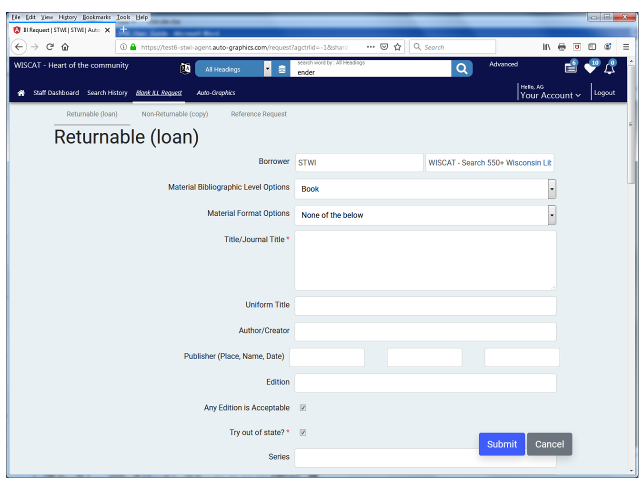
To select a patron from the SIP2 database:

1. When you access the ILL Request Form or Blank Request Form, the Select a Patron screen displays.
2. Click the **ILS Lookup** tab.
   - The screen refreshes to display the ILS Lookup form fields.
3. Enter the patron's barcode and PIN in the **Barcode** and **Pin** text boxes.
4. Click the **Search** button.
   - The Select a Patron screen closes, and the request form displays. Information from the user record for the selected user is *automatically* entered in the **Patron Name (Last, First)**, **Library Card Number**, **Address**, **Phone**, **Fax** and **Email** fields, as appropriate.

Using the Blank Request Form

The Blank Request Form is used when a bibliographic record is not located for the desired title. The Blank Request Form lets you select which lenders will receive the request, add notes or additional information related to the request, and include information pertaining to the patron who requested the items. The system pre-fills the **Request Date** field on the form with the current calendar date.

Fields identified by a red asterisk (*) are mandatory and must be filled in. All other fields are optional.



Blank Request Form

To prepare the Blank Request Form:

1. Access the Blank Request Form:
   - **From Search:** Click the **Blank ILL Request** link on any screen in the Search interface; the Blank Request Form displays.
   - **From ILL Administration:** Select **Blank Request Form** from the **ILL Admin** menu; the Blank Request Form displays.

*For systems utilizing optional SIP2 functionality, the Select a Patron screen displays (see **Using Select a Patron (SHAREit/SIP2 Authentication)** on page **21** for details). The desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*

2. Enter the required information in the form fields (see ***ILL Request Form Fields*** on page **15** for more information).

   - If your library has enabled ILL Request Limits, it is recommended that you use the Patron Lookup function (see ***Using Patron Lookup (SHAREit Authentication only)*** on page **20** for details) to select the desired patron to ensure that any ILL request Limit placed on the patron is not inadvertently exceeded. If a patron selected using the Patron Lookup function has reached the specified ILL request Limit, an advisory dialog displays the message "(*patron name*) has exceeded the ILL request limits (*request limit*). Do you want to override the limit and proceed with the request?"

     *The **Patron Lookup** function is available only for system utilizing the User Administration module as the only means to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed (see **Using Select a Patron (SHAREit/SIP2 Authentication)** on page **21** for details).*

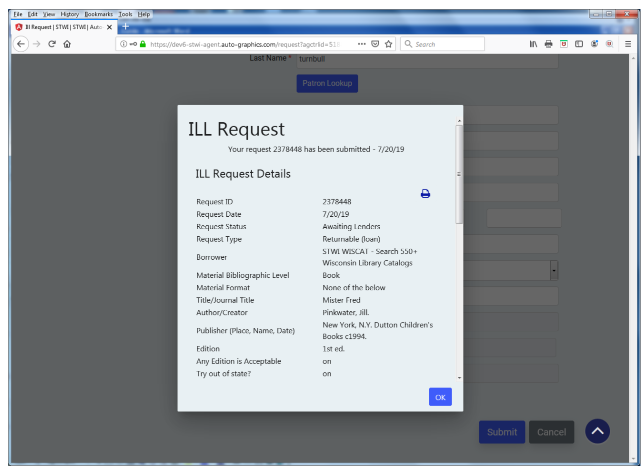
     - Click the **OK** button to override the limit and proceed with the request.
     - Click the **Cancel** button to cancel the request.

3. Click the **Submit** button to submit the ILL request.

   - If your interlibrary loan request is *unsuccessful*:

     - If you enter incomplete information in the ILL Request Form, a message indicating the required information displays briefly at the top of the screen.

       *If you have not included mandatory information in the ILL Request Form, a warning dialog displays a message listing the required information. Click the **OK** button on the warning dialog to return to the ILL Request Form. Enter the required information, then click the **Submit** button to resubmit the form.*



Typical ILL Request Confirmation Screen

     - Enter the required information and click the **Submit** button to resubmit the request.

   - If your interlibrary loan request is *successful*:

     - A confirmation dialog displays.

   - If desired, you can print a copy of the request (see ***Printing the ILL Request Confirmation*** on page **25** for details).
   - Click the **OK** button to close the confirmation dialog and return to the previous Full Record Display.

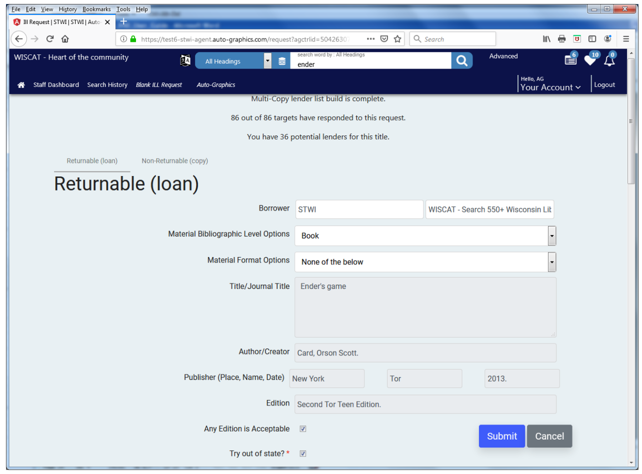
Special Considerations for Multi-Copy Requests

*Refer to **Using the ILL Request Form** on page **13** and **Using the Blank Request Form** on page **22** for general procedures for using the ILL Request Form and Blank Request Form.*

Fields identified by a red asterisk (*) are mandatory and must be filled in. All other fields are optional.

To submit a multi-copy request using the ILL Request Form:

1. Access the Full Record Display for the item for which you wish to submit a multi-copy request.
2. Select **Multi Copy** from the **Staff Functions** menu.
   - The ILL Request Form displays.
   - The system searches *all valid databases (whether displayed on the search screen or not)* for potential lenders for the title. The message "(##) out of (##) targets have responded to this request. Current Lenders Found: (##) You can stop this process at any time." displays while the **Lender List** is created.
     - You can stop the search for potential lenders at any time by clicking the **Stop** button. The **Lender List** will include *only* those lenders located before the process was stopped, and the message "You have stopped the Multi-Copy lender list build process. (##) out of (##) targets have responded to this request. You may not have located all of the potential lenders for this title." displays.



Multi Copy Request Form

   - When the search for lenders is complete, the message "Multi-Copy lender list build is complete. (##) out of (##) targets have responded to this request. You have (##) potential lenders for this title." displays.
3. Enter the required information in the form fields (see ***ILL Request Form Fields*** on page **15** for more information) and click the **Submit** button.

   *The **Number of Copies Needed (over 1 creates multiple requests)** text box may initially be blank or may contain a default value specified by your library. BE SURE to enter the desired number of copies in the **Number of Copies Needed (over 1 creates multiple requests)** text box.*

   - The system creates individual requests (with unique Request Numbers) equal to the value in the **Number of Copies Needed (over 1 creates multiple requests)** text box.
   - When the requests have been created:
     - If a *single* request was created, the confirmation message "Your request (*request number*) has been submitted – (*calendar date*)" displays.
     - If *multiple* requests were created, the confirmation message "Your requests (*request numbers*) have been submitted – (*calendar date*)" displays.

*If the **Number of Copies Needed** specified is greater than the number of lenders in the **Lender List**, the message "The number of copies (number of copies specified) can not exceed the number of lenders (number of lenders in Lender List)" displays briefly at the top of the screen when you submit the request. Either decrease the **Number of Copies Needed** specified, or add additional lenders to the **Lender List**. For libraries using "Default Lender" functionality, default lenders are appended to the **Lender List** for each request in the multi-copy request set if there is at least one lender per request. If there are fewer lenders than copies needed, the default lenders will not be appended to the multi-copy requests.*

To submit a multi-copy request using the Blank Request Form:

1. Access the Blank Request Form.
2. Enter the required information in the form fields (see ***ILL Request Form Fields*** on page **15** for more information) and click the **Submit** button.

*The **Number of Copies Needed (over 1 creates multiple requests)** text box may initially be blank or may contain a default value specified by your library. BE SURE to enter the desired number of copies in the **Number of Copies Needed (over 1 creates multiple requests)** text box. BE SURE the number of lenders added to the **Lender List** is equal to or greater than the value entered in the **Number of Copies Needed (over 1 creates multiple requests)** text box.*

- The system creates individual requests (with unique Request Numbers) equal to the value in the **Number of Copies Needed (over 1 creates multiple requests)** text box.

*If the **Number of Copies Needed** specified is greater than the number of lenders in the **Lender List**, the message "The number of copies (number of copies specified) can not exceed the number of lenders (number of lenders in Lender List)" displays briefly at the top of the screen when you submit the request. Either decrease the **Number of Copies Needed** specified, or add additional lenders to the **Lender List**. For libraries using "Default Lender" functionality, default lenders are appended to the **Lender List** for each request in the multi-copy request set if there is at least one lender per request. If there are fewer lenders than copies needed, the default lenders will not be appended to the multi-copy requests.*

Printing the ILL Request Confirmation

Once your ILL Request has been submitted, you can print a copy of the request confirmation screen for your records.

To print the ILL request confirmation:

- On the ILL request confirmation screen, click the link.
  - A formatted version of the ILL request confirmation displays in an *additional* browser window, and a standard Print dialog displays.
- Make the desired selections on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

Submitting a 3rd Party ILL Request

Some consortia may use a 3rd party provider to manage ILL activities for the library. In these cases, the Full Record Display includes a **3rd Party Request** button in place of the **Request This Item** button. Click the **3rd Party Request** button to access the ILL Request Form.

Consult your consortium's 3rd party ILL provider for information on completing and submitting your ILL requests using the 3rd Party ILL Request Form.

Working with Reference Requests

The Blank Request Form includes a **Reference Request** option that allows you to submit an "information only" request to another lender. By default, Reference Requests are submitted to the lender specified as the **Reference Lender** in the System Wide Record. You may modify the **Lender List** on the Blank Request Form to submit the Reference Request to any desired lender(s). The system pre-fills the **Request Date** field on the form with the current calendar date.

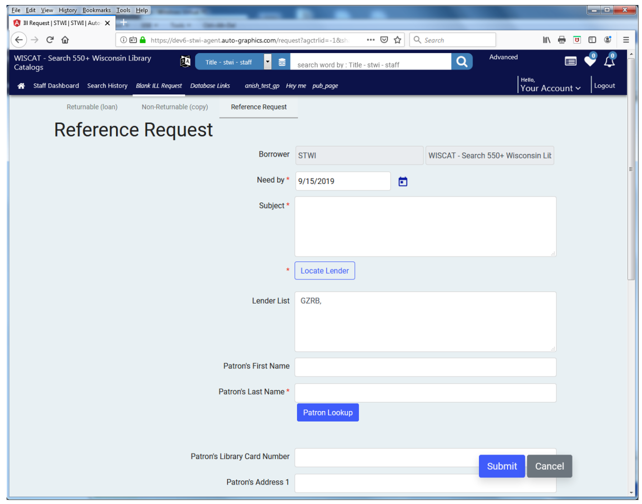
For systems utilizing optional SIP2 functionality, the Select a Patron screen displays (see ***Using Select a Patron (SHAREit/SIP2 Authentication)*** *on page* ***21*** *for details). The desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed.*

Submitting a Reference Request

Fields identified by a red asterisk (*) are mandatory and must be filled in. All other fields are optional.

To submit a Reference Request:

1. Access the Blank Request Form:
   - From Search:
     - Click the **Blank ILL Request** link on any screen in the Search interface; the Blank Request Form displays.
   - From ILL Administration:
     - Select **Blank Request Form** from the **ILL Admin** menu; the Blank Request Form displays.
2. Click the **Reference Request** tab at the top of the form.
   - The Blank Request Form refreshes to display the Reference Request Form fields.



Reference Request Form

3. Click the icon to select a **Need By** date (date by which the information is required) using the Date Entry Calendar (see the ***System Basics User Guide*** for details).
4. Enter the text for your Reference Request in the **Subject** field.

   *The **Subject** text will appear as the **Title** when the request is viewed in the Request Manager, Title Browse and Patron Browse lists.*
5. Enter *at least* one lender in the **Lender List**; include the Library Code for each library to which you wish to submit the request. If desired, you can use the **Locate Lender** function to add lenders to the **Lender List** (see ***Locating ILL Lenders*** on page **19** for details).

   When entering a Library Code only, be sure to include a comma following the code.

   *By default, the **Lender List** is pre-filled with the Library Code for the **Reference Lender** specified in the System Wide Record or by the **Ref Request Default** lender in the Participant Record for your library, when specified. In cases where both a **Reference Lender** and a **Ref Request Default** lender have been defined, the **Ref Request Default** takes precedence.*
6. Enter the necessary Patron Information:
   - Enter the name of the patron for whom the request is being prepared in the **Patron's First Name** and **Patron's Last Name** text boxes. Enter the patron's library card number in the **Patron's Library Card Number** text box.
     - If desired, you can use the Patron Lookup feature to locate the desired patron (see ***Using Patron Lookup (SHAREit Authentication only)*** on page 20 for details).

       *The **Patron Lookup** function is available only for system utilizing the User Administration module as the only means to manage authenticated patrons. For systems utilizing optional SIP2 functionality, the desired patron must be selected from either the SHAREit database or SIP2 database before the request form is displayed (see **Using Select a Patron (SHAREit/SIP2 Authentication)** on page **21** for details).*
   - If you wish, enter the patron's mailing address in the Patron's Address 1, Patron's Address 2 and Patron's Address 3 (City, State, Zip) text boxes.
   - Enter the patron's telephone number(s), fax number(s) and/or email address(es) in the **Phone**, **Patron's Contact 1** and **Patron's Contact 2** text boxes. *You must provide at least one contact method in the **Patron's Contact 1** text box.*
7. Enter the patron's contact information in the **Patron's Contact 1** and **Patron's Contact 2** text boxes.

8. If appropriate, enter the **Patron's Program and Course** and **Patron's Status and Year**.
9. If necessary, enter any text meant for the lending library staff in the **Borrower's Notes** text box.
10. Click the **Submit** button to submit the reference request.
    - If your reference request is *unsuccessful*:
        - If you enter incorrect or incomplete information in the Reference Request Form, an advisory message indicating the required information displays briefly at the top of the screen.
        - Enter the required information and click the **Submit** button to resubmit the request.
    - If your reference request is *successful*:
        - A confirmation screen displays.
    - If desired, you can print a copy of the request (see ***Printing the ILL Request Confirmation*** on page **24** for details).

Chapter 3. MANAGING REQUESTS

Overview

The Request Manager enables you to process interlibrary loan requests. The Request Manager menu provides an overview of your library's ILL activity *both* as a borrower *and* as a lender.

The **Manage Borrower Requests (Status)** section shows the current status for *all* active and completed requests submitted by your library *as a borrower*. The **Action items** section lists up to 24 status categories for ILL requests submitted by your library *as a borrower*, and indicates the total number of active and completed requests in each category. Only those requests that require action by you are displayed in the **Action items** section of the list. The **Items awaiting trading partner response** section provides information related to requests that your library has submitted *as a borrower* that are awaiting response from the lenders to which they were submitted. The **Items awaiting trading partner response** section shows a listing of lender status categories, and indicates the total number of active and completed requests in each category.

The **Manage Lender Requests (Status)** section shows the current status for *all* active and completed requests received by your library *as a lender*. The **Action items** section lists seven status categories for ILL requests received by your library *as a lender*, and indicates the total number of active and completed requests in each category. Only those requests that require action by you are displayed in the **Action items** section of the list. The **Items awaiting trading partner response** section provides information related to requests that your library has received *as a lender* that are awaiting response from the borrowers from which they were received. The **Items awaiting trading partner response** section shows a listing of borrower status categories, and indicates the total number of active and completed requests in each category.

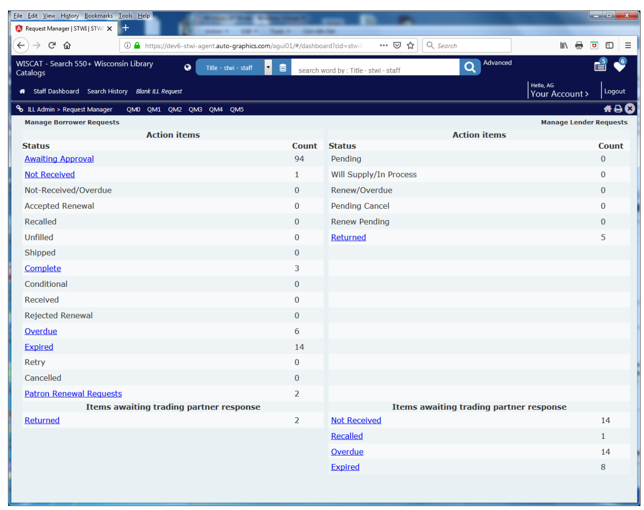
Using the Request Manager

To manage requests:

1. Select **Request Manager** from the **ILL Admin** menu (see ***The ILL Admin Menu* on page 8** for details).
   - The Request Manager screen displays.
2. Click the link for the status category you wish to view.

   Categories in which no ILL requests are pending are shown in "normal" type; these categories cannot be selected for viewing.

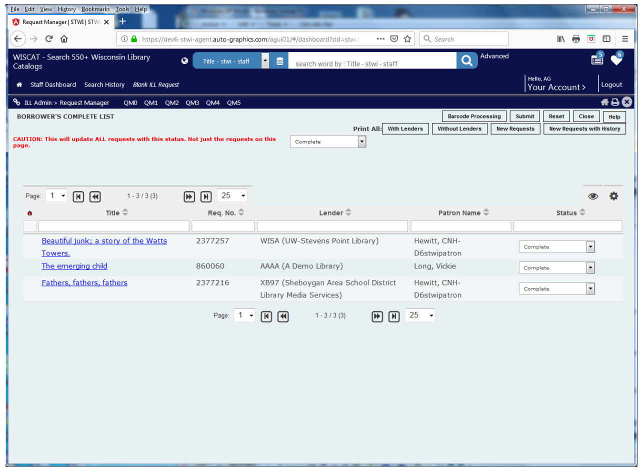
   - To view requests that require action by you, click a link in the **Manage Borrower Requests - Action Items** field or **Manage Lender Requests - Action Items** field, as appropriate.



Request Manager Screen

   - To view requests awaiting action by trading partners, click a link in the Manage Borrower Requests - Items awaiting trading partner response field or Manage Lender Requests - Items awaiting trading partner response field, as appropriate.
3. A browse list of all active and completed ILL requests in the selected status category displays. The list is arranged alphabetically by title, and includes the Request Number (**Req. No**) and current status information.

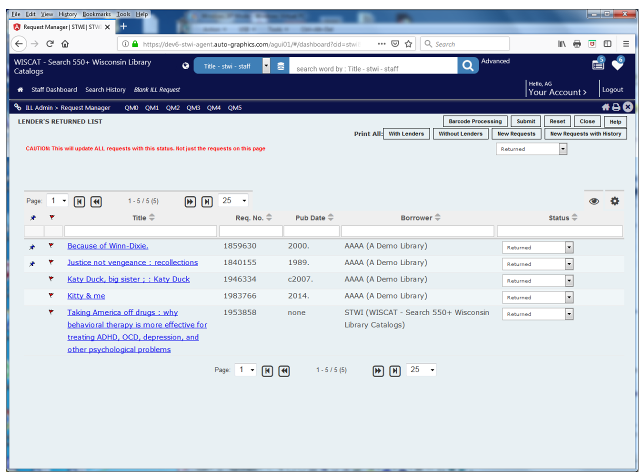
- For Borrowers *only*:
  - Borrower's Status Browse Lists include the Library Code and library name of the *current* **Lender** for each item in the list, if applicable.
  - If your library has enabled the "owned by this library" indicator, a icon is displayed next to *all requests* for which your library holds a copy of the title, and the Full Record Display (see ***Full Record Display*** on page **58** for details) for the request includes the message "This item is owned by your library" at the top of the screen.



Status Browse List - Borrower

  - If desired, you can reconfigure, sort and filter Browse List content (see the ***System Basics User Guide*** for details).
  - Depending on the current status category, the **Status** column of the Status Browse List will include a link to the Copyright Clearance Center for **Non-returnable (copy)** ILL Requests (see ***Accessing the Copyright Clearance Center*** on page **69** for more information).

- For Lenders *only*:
  - Lender's Status Browse Lists include the library Code and library name of the **Borrower** for each item in the list.
  - If your library or consortium has enabled the *optional* "Soon To Be Referred" indicator, all requests for which only *one day* to respond remains (i.e., the request will be forwarded to the next lender through midnight processing) are identified by a icon in the left column of the list. For example, if the deadline date is January 18th, the flag will appear on both January 17th and the 18th, and the request will move to the next lender at midnight on the 18th.



Status Browse List - Lender

  - If your library or consortium has enabled the *optional* "Notes" indicator, all requests for which **Borrower's Notes**, **Patron's Notes** or **Volumes Needed** information have been included are identified by a icon in the left column of the list.

    The icon is shown for requests containing ***Patron's Notes*** *only when the* ***Show Patron Note to Lenders*** *option in the Participant Record for the borrowing library is set to* ***Yes*** *(see* ***Maintaining Participant Records*** *on page* ***99*** *for details).*

    The icon is shown for requests containing ***Volumes Needed*** *information only when the ILL Request Form or Blank Request Form from which the request was created included the* ***Volumes Needed*** *field (see* ***Configuring ILL Request Forms*** *on page* ***131*** *for details) and the* ***Move Request with Patron Note to Awaiting Approval*** *and/or* ***Move Request with Vols Needed Note to Awaiting Approval*** *option in the Participant Record for the borrowing library is set to* ***Yes*** *(see* ***Maintaining Participant Records*** *on page* ***99*** *for details).*

- Use the “browse bar” to scroll the browse list:
  - Use the “number of requests” menu to specify the number of requests to be displayed per page of the Status Browse List; **25**, **50**, **100** or **250**.
  - Use the **Page** menu to scroll the Status Browse List to a selected page.
  - If the Status Browse List is *more than* one page long, use the (first page), (previous page), (next page) and (last page) buttons to view the list one page at a time.
  - Within a status, requests with the same title are ordered by Request Number (**Req. Number**).

Sorting Status Browse Lists

*For information on configuring, sorting and filtering Status Browse List content , see the **System Basics User Guide**.*

- BE SURE the Status Browse list is configured to include the field by which you wish to sort the list: **Author**, **Borrower** (for Lender’s status categories *only*), **Call Number**, **Category**, **Due Date**, **Format**, **LastStatusChgDate**, **Lender** (for Borrower’s status categories *only*), **Material Type**, **Need by Date**, **Orig Date**, **Patron Name** (for Borrower’s status categories *only*), **Pub Date** (for Lender’s status categories *only*), **Req. No.**, **Req. Type**, **Resp. by Date**, or **Title**. For consortia that have selected the “Owned by This Library” option, **Owned by this Library** sort key is included in the borrower’s Awaiting Approval status. For consortia that have selected the “Notes” Indicator option, **Special Instructions Note** sort key is included in the lender’s Pending status.
- Click the column head you wish to use as the sort key.
  - The screen refreshes with requests sorted in alphanumeric order according to the selected sort key. If you sort by one of the fields on the Status Browse list.
  - If new requests are added while the sorting is occurring, they will not be included in that sort, but will be included if you refresh the screen.
  - The following tables define the default and secondary, and in some cases, the tertiary, sort orders for the borrower and lender statuses.

Borrower’s Sort Order Descriptions

SORT ORDER	PRIMARY SORT ORDER	SECONDARY SORT ORDER
Author	Alphabetically by text in author field	Title, then Req. No.
Call Number	Requests with no call numbers, followed by requests with call numbers	Req. No.
Category	Guest, followed by Patron	Title, then Req. No.
Due Date	Date in ascending date order	Title, then Req. No.
Format	Braille, Electronic, Large Print, Microform, none	Within each, by title, then Req. No.
Lender	Lender’s library code and full name spellout	Title, then Req. No.
Last Status Change Date	Date in ascending date order	Title, then Req. No.
Material Type	Archival Mixed Material, Book, Computer File, Map, Music, Music Score, Non-Musical Sound Recording, Serial, Visual Material	Within each, by title, then Req. No.
Need-by Date	Date in ascending date order	Title, then Req. No.
Orig Date	Date in ascending date order	Title, then Req. No.
Patron Name	Text in the patron name field; normalized	Title, then Req. No.

SORT ORDER	PRIMARY SORT ORDER	SECONDARY SORT ORDER
Resp. by Date	Date in ascending date order	Title, then Req. No.
Req. No.	Lowest request number	Title, then request ID
Req. Type	Returnable (BRW), non-returnable (CPY), reference request (REF)	Within each, by title, then Req. No.
Title	Title, excluding initial articles	Req. No.

Lender's Sort Order Descriptions

SORT ORDER	PRIMARY SORT ORDER	SECONDARY SORT ORDER
Author	Alphabetically by text in author field	Title, then Req. No.
Borrower	Borrower's library code and full name spellout	Title, then Req. No.
Call Number	Requests with no call numbers, followed by requests with call numbers	Title, then Req. No.
Category	Guest, followed by Patron	Title, then Req. No.
Due Date	Date in ascending date order	Title, then Req. No.
Format	Braille, Electronic, Large Print, Microform, none	Within each, by title, then Req. No.
Last Status Change Date	Date in ascending date order	Title, then Req. No.
Material Type	Archival Mixed Material, Book, Computer File, Map, Music, Music Score, Non-Musical Sound Recording, Serial, Visual Material	Within each, by title, then Req. No.
Need-by Date	Date in ascending date order	Title, then Req. No.
Orig Date	Date in ascending date order	Title, then Req. No.
Pub Date	Chronologically by publication date	Title, then Req. No.
Req. No.	Lowest request number	Title, then Req. No.
Req. Type	Returnable (BRW), non-returnable (CPY), reference request (REF)	Within each, by title, then Req. No.
Resp. by Date	Date in ascending date order	Title, then Req. No.
Title	Title, excluding initial articles	Req. No.

Due to the manner in which titles are "normalized" for display, some titles may sort differently than may be expected. This condition occurs primarily with titles containing numeric digits next to alphabetic characters, without spaces. For example, if requests are present for the titles "Terminator" and "Terminator2," the title "Terminator2" will precede "Terminator" rather than following it, as would be expected. The title "Terminator 2" will sort as expected.

*The sort order selected for the **Pending** status category is also applied when printing Pick Lists. For example, if you wish to print new lending requests by **Title** and the **Due Date** sort order is currently selected, you will need to choose the desired sort order (i.e., **Title)** from the **Sort this Status by** menu before printing the Pick List. Once the new requests on the Pick List have been printed, you can return the sort order to the previous selection.*

Updating ILL Requests

To change the status of an ILL request:

- Determine the appropriate status option based on the current status of the request. The specific options presented in the **Status** menus depend upon the current status of the request (see ***ILL Status Definitions*** on page **34** for details).

- To apply status changes on a request-by-request basis, select the desired option from the **Status** menu for *each title* in the list.

- To apply the same status change to multiple selected requests, filter the status browse list to display *only* those requests to which you wish to apply a common status change (see the ***System Basics User Guide*** for more information), then click the icon and choose the desired status from the **Update Status Requests for this page only** menu.

  If the filtered Status Browse List is more than *one page long,* BE SURE *to update the requests on all pages of the filtered list.*

- To update *all* requests in the Status Browse List, apply the same status change to *all titles* in the list using the **This will update ALL requests with this status. Not just the requests on this page** menu.

  *The **This will update ALL requests with this status. Not just the requests on this page** menu is available only when* two or more *requests are present in the Status Browse List.*

  - **For Lenders *only*:** When updating the status of a request currently at a status of **Pending**, **Will Supply/In Process** or **Pending Cancel**, it is necessary to include a reason or condition along with the status change. Select the appropriate reason or condition from the **Reason/Condition** menu for *each title* in the list *or* apply the same reason or condition to *all titles* in the list using the **Apply to All Requests on this page** menu (see ***Lender's Reasons/Conditions for Response*** on page **47** for details). A default reason or condition is provided if the lender does not need to provide a specific one.

  - **For Borrowers *only*:** Lenders may provide a reason or condition when updating the status of a request (see ***Lender's Reasons/Conditions for Response*** on page **47** for details). Reasons or conditions specified by the lender are shown in the **History Info** field on the Full Record Display for the request (see ***Viewing ILL Request History*** on page **64** for details). *Be sure* you understand and accept the reason or condition specified *before* updating the status of the request. Additionally, it may be necessary to *modify* the request to conform to or address the lender's stated conditions.

  In some *cases, you can change the status of a request in the **Items awaiting trading partner response** field (see* **Updating Trading Partner Status** *on page **49** for conditions).*

- If necessary, add History notes (see ***Viewing ILL Request History*** on page **64** (borrower) or on page **80** (lender) for details) pertaining to the status change for an ILL request using the Full Record Display for the request.

  - **For Borrowers *only*:** Requests with a status of **Cancelled**, **Patron Cancellation Requests**, **Retry** or **Unfilled** include a **For Patron: Why Request was not Filled** field. If appropriate, enter any explanatory text for the patron indicating the reason that the request was not filled (item is owned locally, **Need By** date was too soon, etc.). Text entered in this field is viewable by the patron through the **ILL Request Tracking** and **Your Transactions – Items From Other Libraries** features. Text is displayed to the patron in the **Status** field under the heading "**Note**."

- Click the **Submit** button to change the status of the request(s) and return to the current status browse list.

  *To reset the **Status** menus for* all *requests to their initial conditions, click the **Reset** button before updating.*

- Once you have updated the status of *all* requests in the browse list, the browse list *automatically* closes and returns you to the Status Browse screen.

To view the Full Record Display for an ILL request:

Click a title link in the browse list to display the Full Record Display for that request (see ***Full Record Display*** on page **58** (borrower) or on page **75** (lender) for details).

You may also use the Full Record Display to change the status of an ILL request.

ILL Status Definitions

Each ILL request is assigned to a status category that represents its current position in the ILL process. The status of an ILL request changes only through *direct action* by a borrowing or lending library or through *automated action* by the system.

Borrower's ILL Status Definitions

<table>
<tr><th>Status</th><th>Definition</th><th>Result if No Action is Taken</th></tr>
<tr><td>Awaiting Lenders</td><td>The system is searching all libraries (union databases and Z39.50 targets) registered as potential lenders for your library in both the Preferred Lender List in your library's Participant Record and the Lender Priority List in the System Wide Record for your consortium to populate the ILL request Lender List. Once "background processing" is completed, and the Lender List for the request has been generated, the request is automatically moved to the Awaiting Approval status category, or is forwarded to the first lender in the Lender List, depending on the ILL permissions granted to the requester.
You may update an Awaiting Lenders request by selecting one of the following options from the Status menu:
Add Lenderlist – This option permits staff to add one or more Library Codes to the lender list.
Selecting this option sets lender's status to Pending.
Add Lenderlist Mediated – This option permits staff to add one or more Library Codes to the lender list.
Selecting this option sets borrower's status for this request to Awaiting Approval.
Cancel – This option indicates the ILL request is cancelled.
Selecting this option sets borrower's status for this request to Cancelled. The system automatically deletes Cancelled requests after a preset period of time (set in the System Wide Record) has expired.
Delete – This option flags the associated request for deletion. The request is deleted during midnight processing.
Awaiting Lenders status is available only if your library or consortium has enabled the optional "Enhanced Request This Item" functionality.</td><td>Not applicable</td></tr>
<tr><td>Awaiting Approval</td><td>Request is awaiting approval before being sent to lenders. Automatic Approval may be set by System Administration. You may respond to an Awaiting Approval request by selecting one of the following options from the Status menu:
Approved - Send – This option indicates the ILL request has been approved by appropriate library staff, and the request is forwarded to the specified lender(s).
Selecting this option sets lender's status for this request to Pending.
When Approved - Send is selected from the Borrower's Awaiting Approval List, and the associated request(s) has an invalid lender list (the lender list is empty or contains invalid lenders), the message "One or more requests do not contain valid lenders. Those requests have not been sent." displays. The associated request(s) remain in the Awaiting Approval status category when the update is submitted.
Cancel – This option indicates the ILL request is cancelled.
Selecting this option sets borrower's status for this request to Cancelled.
Delete – This option flags the associated request for deletion. The request is deleted during midnight processing.
ILL Review – For systems that have enabled the optional "Modify Existing Request" functionality, this option allows for editing of the ILL Request (see Modifying an Existing Request on page 61 for details).
Selecting this option sets borrower's status for this request to ILL Review.
The ILL Review option is available only to Library SuperUsers or Customer SuperUsers.</td><td>Stays in Awaiting Approval for 730 days.</td></tr>
</table>

Status	Definition	Result if No Action is Taken
Not Received	Borrower has not received item from lender, and deadline (days to supply) has expired. You may respond to a **Not Received** request by selecting one of the following options from the **Status** menu: • **Received –** This option indicates the requested material has been received from the lender. ○ Selecting this option sets borrower's status for the ILL request to **Received**. • **Lost –** This option indicates that the item has been lost by the patron, the borrowing library, or lost in transit. ○ Selecting this option sets lender's status for the ILL request to **Lost**. *Depending on the standard practices and procedures for your consortium, it may be necessary to contact the lender to aid in determining the actual physical status of the associated item before designating the item as **Lost**.*	Stays in **Not Received** for 730 days.
Not Received/ Overdue	Lender has sent an Overdue notification to borrower for an item that has not yet been received by borrower. • **Received** – This option indicates you have received the item. ○ Selecting this option sets borrower's status for the ILL request to **Received**. • **Lost –** This option indicates that the item has been lost in transit. ○ Selecting this option sets lender's status for the ILL request to **Lost**. *Depending on the standard practices and procedures for your consortium, it may be necessary to contact the lender to aid in determining the actual physical status of the associated item before designating the item as **Lost**.*	Stays in **Not Received/Overdue** for 730 days.
Accepted Renewal	Lender allows borrower to renew loan. You may respond to an **Accepted Renewal** request by selecting one of the following options from the **Status** menu: • **Returned –** This option indicates you have shipped the borrowed material back to the lender. ○ Selecting this option sets lender's status for the ILL request to **Returned**. • **Renewal –** This option indicates you are requesting another extension of the loan for the borrowed material. ○ Selecting this option sets lender's status for the ILL request to **Renew Pending**. • **Lost –** This option indicates the patron who borrowed the material has reported the material as lost. ○ Selecting this option sets lender's status for the ILL request to **Lost**. *Depending on the standard practices and procedures for your consortium, it may be necessary to contact the lender to aid in determining the actual physical status of the associated item before designating the item as **Lost**.*	Midnight Processing moves request to **Overdue** after *Days to Return* has passed.
Recalled	Lender needs item returned before due date. You may respond to a **Recalled** request by selecting one of the following options from the **Status** menu: • **Returned –** This option indicates the recalled material has been returned to the lender. ○ Selecting this option sets lender's status for the ILL request to **Returned**. • **Received –** This option indicates the recalled material has been received from the lender. (You may select this option in the event an item is recalled *before* the item is received from the lender.) ○ Selecting this option sets borrower's status for the ILL request to **Recalled**. • **Lost –** This option indicates the patron who borrowed the material has reported the material as lost, or that you suspect the item has been lost in transit. ○ Selecting this option sets lender's status for the ILL request to **Lost**. *Depending on the standard practices and procedures for your consortium, it may be necessary to contact the lender to aid in determining the actual physical status of the associated item before designating the item as **Lost**.*	Midnight Processing moves request to **Overdue** after *Days to Return* has passed.

Status	Definition	Result if No Action is Taken
Unfilled	Borrower's request has been submitted to *all* lenders in the **Lender List**, and has not/will not be filled by any lender or was changed to **Unfilled** after the deadline has expired. You may respond to an **Unfilled** request by selecting one of the following options from the **Status** menu: • **Approved-Send –** This option indicates the ILL request has been approved for resubmittal by appropriate library staff, and the request is forwarded to the specified lender (s). ○ Selecting this option sets lender's status for this request to **Pending**. ○ You *must* enter the lenders to whom you wish to submit the request in the **Lender List** on the Full Record Display for the request. You *may* resubmit the request to the same lenders, or send the request to different lenders. *You may need to change the **Need By** date on the Full Record Display for the ILL request to prevent the request from being placed in **Expired** status.* • **Delete –** This option flags the associated request for deletion. The request is deleted during midnight processing. *The Full Record Display for requests with a status of **Unfilled** includes a **For Patron: Why Request was not Filled** field. Text entered in this field is viewable by the patron through the **ILL Request Tracking** feature. Text is displayed to the patron in the **Status** field under the heading **Note from library staff**. This field is intended to allow library staff to inform the patron of the reason(s) the request was not filled.*	Midnight Processing moves request to **Expired** after **Need by** date for the request has passed.
Shipped	Lender has shipped requested title to borrower. You may respond to a **Shipped** request by selecting one of the following options from the **Status** menu: • **Received –** This option indicates you have received the requested material. ○ For **Returnable (loan)** requests, selecting this option sets borrower's status for the ILL request to **Received**. ○ For **Non-returnable (copy)** requests, selecting this option sets borrower's status for the ILL request to **Complete**. • **Lost –** This option indicates that the item has been lost by the patron, the borrowing library, or lost in transit. ○ Selecting this option sets lender's status for the ILL request to **Lost**. *Depending on the standard practices and procedures for your consortium, it may be necessary to contact the lender to aid in determining the actual physical status of the associated item before designating the item as **Lost**.* • **Cancel Shipped Request –** This option indicates the ILL request for an item that has been shipped is cancelled. ○ Selecting this option sets borrower's status for the ILL request to **Cancel Shipped Request**.	Midnight Processing moves request to **Not Received** after the *Days to Supply* has passed.
Complete	Lender has received material returned by borrower (ILL transaction is complete). The system will automatically delete **Complete** requests after a preset period of time (set in the System Wide Record **–** Finished Requests Deleted in) has expired. • **Lost –** This option indicates that you suspect the item has been lost in transit. *Depending on the standard practices and procedures for your consortium, it may be necessary to contact the lender to aid in determining the actual physical status of the associated item before designating the item as **Lost**.* • **Delete –** This option flags the associated request for deletion. The request is deleted during midnight processing.	Stays in **Complete** for 730 days.
Conditional	Lender can supply the requested item subject to the conditions specified. You may respond to a **Conditional** request by selecting one of the following options from the **Status** menu:	Stays in **Conditional** for *Days to Respond* or until *need-by date* expires.

Status	Definition	Result if No Action is Taken
Conditional (Cont)	• **Accept Condition–** This option indicates you accept ALL conditions specified by the lender, and the lender may continue processing the request. You may wish to add a note in the **History Notes** to confirm acceptance of conditions, agree to the shorter loan period, indicate the delivery service to return the loaned item, etc. ○ Selecting this option sets lender's status for the ILL request to **Pending**. • **Reject Condition–** This option indicates you *do not* accept ALL conditions specified by the lender. ○ Selecting this option forwards the ILL request to the next lender in the Lender List for this request. If the current lender is the *final* lender in the Lender List, selecting this option sets borrower's status for the ILL request to **Unfilled**.	Stays in **Conditional** for *Days to Respond* or until *need-by date* expires.
Received	Borrower has received item from lender. You may respond to a **Received** request by selecting one of the following options from the **Status** menu: • **Returned –** This option indicates you have shipped the borrowed material back to the lender. ○ Selecting this option sets lender's status for the ILL request to **Returned**. • **Renewal –** This option indicates you are requesting an extension of the loan of the borrowed material. ○ Selecting this option sets lender's status for the ILL request to **Renew Pending**. • **Lost –** This option indicates the patron who borrowed the material has reported the material as lost. ○ Selecting this option sets lender's status for the ILL request to **Lost**. *Depending on the standard practices and procedures for your consortium, it may be necessary to contact the lender to aid in determining the actual physical status of the associated item before designating the item as **Lost**.*	Midnight Processing moves request to **Not Received** after the *Days to Supply* has passed.
Rejected Renewal	Lender denies renewal of loan. You may respond to a **Rejected Renewal** request by selecting one of the following options from the **Status** menu: • **Returned –** This option indicates you have shipped the borrowed material back to the lender institution. ○ Selecting this option sets lender's status for the ILL request to **Returned**. • **Renewal –** This option indicates you are requesting an extension of the loan of the borrowed material. ○ Selecting this option sets lender's status for the ILL request to **Renew Pending**. • **Lost –** This option indicates the patron who borrowed the material has reported the material as lost. ○ Selecting this option sets lender's status for the ILL request to **Lost**. *Depending on the standard practices and procedures for your consortium, it may be necessary to contact the lender to aid in determining the actual physical status of the associated item before designating the item as **Lost**.*	Midnight Processing moves request to **Overdue** after *Days to Return* has passed.
Overdue	Borrower has not returned item to lender, and due date has expired. You may respond to an **Overdue** request by selecting one of the following options from the **Status** menu: • **Returned –** This option indicates you have shipped the borrowed material back to the lender institution. ○ Selecting this option sets lender's status for the ILL request to **Returned**. • **Renewal –** This option indicates you are requesting an extension of the loan of the borrowed material. ○ Selecting this option sets lender's status for the ILL request to **Renew Pending**.	Stays in **Overdue** for 730 days.

Status	Definition	Result if No Action is Taken
Overdue (Cont)	• **Lost –** This option indicates the patron who borrowed the material has reported the material as lost. ○ Selecting this option sets lender's status for the ILL request to **Lost**. *Depending on the standard practices and procedures for your consortium, it may be necessary to contact the lender to aid in determining the actual physical status of the associated item before designating the item as* ***Lost****.*	Stays in **Overdue** for 730 days.
Expired	**Need By** date for the request has passed and the lender has not responded. You may respond to an **Expired** request by selecting one of the following options from the **Status** menu: • **Approved-Send –** This option indicates the ILL request has been approved for resubmittal by appropriate library staff, and the request is forwarded to the specified lender (s). ○ Selecting this option sets lender's status for this request to **Pending**. ○ You *must* enter the lenders to whom you wish to submit the request in the **Lender List** on the Full Record Display for the request. You *may* resubmit the request to the same lenders, or send the request to different lenders. *You may need to change the* ***Need By*** *date on the Full Record Display for the ILL request to prevent the request from being placed in* ***Expired*** *status.* • **Delete –** This option flags the associated request for deletion. The request is deleted during midnight processing. • **ILL Review –** For systems that have enabled the *optional* "Modify Existing Request" functionality, this option allows for editing of the ILL Request (see ***Modifying an Existing Request*** on page **61** for details). ○ Selecting this option sets borrower's status for this request to **ILL Review**. *The* ***ILL Review*** *option is available only to Library SuperUsers or Customer SuperUsers.*	Stays in **Expired** for *Days to Delete*.
Retry	Lender asks that borrower resubmit the ILL request at a later date. You may respond to a **Retry** request by selecting one of the following options from the **Status** menu: • **Approved-Send –** This option indicates the ILL request has been approved by appropriate library staff, and the request is forwarded to the specified lender (s). ○ Selecting this option sets lender's status for this request to **Pending**. *You may need to change the* ***Need By*** *date on the Full Record Display of the ILL request to prevent the request from being placed in* ***Expired*** *status.* • **Delete –** This option flags the associated request for deletion. The request is deleted during midnight processing. *The Full Record Display for requests with a status of* ***Retry*** *includes a* ***For Patron: Why Request was not Filled*** *field. Text entered in this field is viewable by the patron through the* ***ILL Request Tracking*** *feature. Text is displayed to the patron in the* ***Status*** *field under the heading* ***Note from library staff****. This field is intended to allow library staff to inform the patron of the reason(s) the request was not filled.* • **ILL Review –** For systems that have enabled the *optional* "Modify Existing Request" functionality, this option allows for editing of the ILL Request (see ***Modifying an Existing Request*** on page **61** for details). ○ Selecting this option sets borrower's status for this request to **ILL Review**. *The* ***ILL Review*** *option is available only to Library SuperUsers or Customer SuperUsers.*	Midnight Processing moves request to **Expired** after **Need by** date for the request has passed.

Status	Definition	Result if No Action is Taken
Cancelled	Request has been cancelled by borrower and will not be sent to any remaining lenders in the Lender List. The system automatically deletes **Cancelled** requests after a preset period of time (set in the System Wide Record) has expired. You may respond to a **Cancelled** request by selecting one of the following options from the **Status** menu: • **Approved-Send –** This option indicates the ILL request has been approved by appropriate library staff, and the request is forwarded to the specified lender(s). ○ Selecting this option sets lender's status for this request to **Pending**. *You may need to change the **Need By** date on the Full Record Display of the ILL request to prevent the request from being placed in **Expired** status.* • **Delete –** This option flags the associated request for deletion. The request is deleted during midnight processing. *The Full Record Display for requests with a status of **Cancelled** includes a **For Patron: Why Request was not Filled** field. Text entered in this field is viewable by the patron through the **ILL Request Tracking** feature. Text is displayed to the patron in the **Status** field under the heading **Note from library staff**. This field is intended to allow library staff to inform the patron of the reason(s) the request was not filled.* • **ILL Review –** For systems that have enabled the *optional* "Modify Existing Request" functionality, this option allows for editing of the ILL Request (see ***Modifying an Existing Request*** on page **61** for details). ○ Selecting this option sets borrower's status for this request to **ILL Review**. *The **ILL Review** option is available only to Library SuperUsers or Customer SuperUsers.*	Midnight Processing moves request to **Expired** after **Need by** date for the request has passed.
ILL Review	*The **ILL Review** status is available only for systems that have enabled the optional "Modify Existing Request" functionality.* Borrower has determined that the bibliographic record associated with the ILL request is not for the correct item. You may respond to an **ILL Review** request by selecting one of the following options from the **Status** menu: *Before changing item status, the ILL Request should be manually edited or "moved" to a different bibliographic record (see **Modifying an Existing Request** on page **61** for details).* • **Approved - Send –** This option indicates the ILL request has been approved by appropriate library staff, and the request is forwarded to the specified lender(s). ○ Selecting this option sets lender's status for this request to **Pending**. • **Cancel –** This option indicates the ILL request is cancelled. ○ Selecting this option sets borrower's status for this request to **Cancelled**. • **Delete –** This option flags the associated request for deletion. The request is deleted during midnight processing.	Stays in **ILL Review** for 730 days.
ILL Review Awaiting Lenders	*The **ILL Review Awaiting Lenders** status is available only for systems that have enabled the optional "Modify Existing Request" functionality.* The system is searching all libraries (union databases and Z39.50 targets) registered as potential lenders for your library in both the **Preferred Lender List** in your library's Participant Record and the **Lender Priority List** in the System Wide Record for your consortium to populate the ILL request **Lender List** for requests updated from **ILL Review** status using an alternate bibliographic record (see ***Modifying an Existing Request*** on page **61** for details). Once "background processing" is completed, and the **Lender List** for the request has been generated, the request is automatically moved to the **Awaiting Approval** status category, or is forwarded to the first lender in the **Lender List**, depending on the ILL permissions granted to the requester. You may update an **ILL Review Awaiting Lenders** request by selecting one of the following options from the **Status** menu: • **ILL Review –** This option indicates the borrower has determined that the bibliographic record associated with the ILL request is not for the correct item. ○ Selecting this option sets borrower's status for this request to **ILL Review**.	Not applicable

Status	Definition	Result if No Action is Taken
Cancel Shipped Request	Request for an item shipped by a lender has been cancelled by borrower. You may respond to a **Cancel Shipped Request** request by selecting one of the following options from the **Status** menu: • **Received –** This option indicates you have received the requested material. ○ For **Returnable (loan)** requests, selecting this option sets borrower's status for the ILL request to **Received**. ○ For **Non-returnable (copy)** requests, selecting this option sets borrower's status for the ILL request to **Complete**. • **Returned –** This option indicates you have shipped the borrowed material back to the lender. ○ Selecting this option sets lender's status for the ILL request to **Returned**.	Stays in **Cancel Shipped Request** for 730 days.
Patron Renewal Requests	*The **Patron Renewal Requests** status category is shown only for libraries and consortia that have enabled the optional "Mediated Patron Renewal Requests" feature.* Patron has submitted a "renewal" request (from the ILL Request Tracking screen) for an item on *initial* loan. You may respond to a **Patron Renewal Request** by selecting one of the following options from the **Status** menu: • **Renewal** - This option indicates the patron's request for renewal is approved and the borrower will request a renewal from the lender. ○ Selecting this option sets lender's status for the ILL request to **Renew Pending**. • **Deny Patron Renewal** - This option indicates the patron's request for renewal is denied. ○ Selecting this option sets borrower's status for the ILL request to **Received**. *Requests with patron renewal requests are also included in the **Received** and **Overdue** statuses. To accept or deny a patron renewal request, you must go into the **Patron Renewal Requests** status, not **Received** or **Overdue**.*	The number of days varies.
Patron Cancellation Requests	*The **Patron Cancellation Requests** status category is shown only for libraries and consortia that have enabled the optional "Patron Cancellation of ILL Requests" feature.* Patron has submitted a "cancel" request (from the ILL Request Tracking screen) for an ILL request with a current status of **Awaiting Approval**, **Pending** or **Will Supply/In Process**. You may respond to a **Patron Cancellation Request** by selecting one of the following options from the **Status** menu: • **Cancel** - This option indicates you accept the patron's cancellation request, and the ILL request is cancelled. ○ Selecting this option sets borrower's status for the ILL request to **Cancelled**. *The **Cancel** option is available only when the status of the ILL request at the time the patron requested the cancellation was **Awaiting Approval**.* • **Request Cancel** - This option indicates you accept the patron's cancellation request, and the *current lender* is notified of the cancellation request. The lender must accept the cancellation before the ILL request is cancelled. ○ Selecting this option sets lender's status for the ILL request to **Pending Cancel**. The lender must accept the cancellation before the ILL request is cancelled. *The **Request Cancel** option is available only when the status of the ILL request at the time the patron requested the cancellation was **Pending** or **Will Supply/In Process**.* • **Deny Patron Cancellation** -This option indicates you *do not* accept the patron's cancellation request, and the request is processed in the normal manner. *The Full Record Display for requests with a status of **Patron Cancellation Requests** includes a **For Patron: Why Request was not Filled** field. Text entered in this field is viewable by the patron through the **ILL Request Tracking** feature. Text is displayed to the patron in the **Status** field under the heading **Note from library staff**. This field is intended to allow library staff to inform the patron of the reason(s) the request was not filled.*	The number of days varies.

Status	Definition	Result if No Action is Taken
ISO Messages	A request appears in this category only when an ISO MESSAGE APDU is received. The ISO MESSAGE is a general message that may relate to a specific ILL request. When AGent receives a MESSAGE from an external trading partner, AGent takes the text/notes field from the MESSAGE and applies it to the **History Information** field of the ILL request referenced in the MESSAGE. A flag is added to the request, and AGent places a copy of the request in the ISO Messages folder. Because the MESSAGE APDU does not change the state of the AGent request, the request is still accessible in the appropriate status browse category. The request now includes a flag to indicate that a message/note needs to be read. Requests stay in the ISO Message category until the request is opened to the Full Record Display. At this point the flag disappears when the full record is displayed. The Full Record Display includes the following reminder at the top of the request: "This request history contains the text of an ISO Message from the lender."	Request moves to the appropriate status after it has been read in the ISO Messages status.
NCIP Hold Placed	*The **NCIP Hold Placed** status category is available only for libraries and consortia that have enabled the optional "Network Handling" feature.* A hold has been placed for the requested item at the local library. You may respond to an **NCIP Hold Placed** request by selecting one of the following options from the **Status** menu: • **Delete –** This option flags the associated request for deletion. The request is deleted during midnight processing.	Stays in **Passed to Local System** for *Days to Delete*.
Passed to Local System	*The **Passed to Local System** status category is available only for libraries and consortia that have enabled the optional "Network Handling" feature.* Request has been passed to the local library system for fulfillment. You may respond to a **Passed to Local System** request by selecting one of the following options from the **Status** menu: • **Delete –** This option flags the associated request for deletion. The request is deleted during midnight processing.	Stays in **Passed to Local System** for *Days to Delete*.

Lender's ILL Status Definitions

Status	Definition	Result if No Action is Taken
Pending	Request has been received by lender, but has not yet been acknowledged. You may respond to a **Pending** request by selecting one of the following options from the **Status** menu: *You must provide a Reason/Condition to accompany the change in status (see **Lender's Reasons/Conditions for Response** on page **47** for details).* • **Will Supply/In Process –** This option indicates you are working on the request or will fill the request, but have not yet sent, the requested material to the borrower. *The default **Reason/Condition** for this option is **Omit Reason**.* ○ Selecting this option sets lender's status for the ILL request to **Will Supply/In Process**. • **Shipped -** This option indicates you have shipped the requested material to the borrower. *The default **Reason/Condition** for this option is **Omit Condition**.* ○ Selecting this option sets borrower's status for the ILL request to **Shipped**. *This option should be selected when shipping **Returnable (loan)** requests only. When shipping **Non-returnable (copy)** requests, select the **Shipped (non-returnable)** option.* ○ If the item will be shipped to the borrower at a later date, change the **Date Shipped** as appropriate (see ***Changing the Date Shipped*** on page **46** for details). • **Shipped (non-returnable) -** This option indicates you have shipped the requested material to the borrower. *The default **Reason/Condition** for this option is **Omit Condition**.*	Stays in **Pending** for *Days to Respond* or until *need-by date* expires.

Status	Definition	Result if No Action is Taken
Pending (Cont)	○ Selecting this option sets borrower's status for the ILL request to **Shipped**. *This option should be selected when shipping **Non-returnable (copy)** requests only. When shipping **Returnable (loan)** requests, select the **Shipped** option.* • **Retry -** This option indicates you are currently unable to supply the requested material, but *may be* able to supply the material at a later date. *The default **Reason/Condition** for this option is **Omit Reason**.* ○ Selecting this option sets borrower's status for the ILL request to **Retry**. ○ You may wish to include appropriate information detailing *when* the ILL request should be resubmitted in the History Notes. • **Conditional -** This option indicates you are able to supply the requested material under specified conditions or restrictions. ○ The *default* **Reason/Condition** for this option is **Other**. ○ Selecting this option sets borrower's status for the ILL request to **Conditional**. ○ You may wish to include a *detailed description* of the conditions or restrictions in the History Notes. • **Will Not Supply –** This option indicates you are currently unable to supply the requested material to the borrower. *The default Reason/Condition for this option is Omit Reason [Unfilled].* *When a default lender is the only lender for a given request, and the default lender updates the status of the request to **Will Not Supply**, any **Reason/Condition** included in the request is considered the "final answer," and the request is moved to **Unfilled** status (the request will not go to **Retry**).* ○ Selecting this option forwards the ILL request to the next lender in the Lender List for this request. If your library is *the final* lender institution in the Lender List, selecting this option sets borrower's status for the ILL request to **Unfilled**. ○ If you *will be* able to provide the requested material at a later date, select the **Retry** option. ○ If you can *currently supply* similar material (for example, an earlier or later edition of the requested title), select the **Conditional** option and specify the appropriate conditions or restrictions. • **ILL Review –** For systems that have enabled the *optional* "Modify Existing Request" functionality, this option allows for editing of the ILL Request (see ***Modifying an Existing Request*** on page **61** for details). ○ Selecting this option sets lender's status for this request to **ILL Review**. Days to Respond (as specified in the lender's Participant Record) are not applied to requests in **ILL Review** status, and midnight processing takes not action on the request. *The **ILL Review** option is available only to Library SuperUsers or Customer SuperUsers.*	Stays in **Pending** for *Days to Respond* or until *need-by date* expires.
Will Supply/In Process	Request has been accepted by lender, but has not yet been filled. Moving a request to **Will Supply/In Process** will change the deadline date from the deadline date on the request (typically 3-5 days) to the current date plus 730 days (i.e., two years). You may respond to a **Will Supply/In Process** request by selecting one of the following options from the **Status** menu: *You must provide a Reason/Condition to accompany the change in status (see **Lender's Reasons/Conditions for Response** on page **47** for details). Defaults are provided.* • **Shipped -** This option indicates you have shipped the requested material to the borrower. *The default **Reason/Condition** for this option is **Omit Condition**.* ○ Selecting this option sets borrower's status for the ILL request to **Shipped**. *This option should be selected when shipping **Returnable (loan)** requests only. When shipping **Non-returnable (copy)** requests, select the **Shipped (non-returnable)** option.*	Stays in **Will Supply/In Process** for 730 days.

Status	Definition	Result if No Action is Taken
Will Supply/In Process (Cont)	○ If the item will be shipped to the borrower at a later date, change the **Date Shipped** as appropriate (see ***Changing the Date Shipped*** on page **46** for details). • **Retry -** This option indicates you are currently unable to supply the requested material, but *may be* able to supply the material at a later date. *The default **Reason/Condition** for this option is **Omit Reason**.* ○ Selecting this option sets borrower's status for the ILL request to **Retry**. ○ You may wish to include appropriate information detailing *when* the ILL request should be resubmitted in the History Notes. • **Conditional -** This option indicates you are able to supply the requested material under specified conditions or restrictions. *The default **Reason/Condition** for this option is **Other**.* ○ Selecting this option sets borrower's status for the ILL request to **Conditional**. ○ You may wish to include additional condition(s) or a *detailed description* of the condition(s) or restriction(s) in the History Notes. • **Will Not Supply –** This option indicates you are currently unable to supply the requested material to the borrower. *The default Reason/Condition for this option is Omit Reason [Unfilled].* *When a default lender is the only lender for a given request, and the default lender updates the status of the request to **Will Not Supply**, any **Reason/Condition** included in the request is considered the "final answer," and the request is moved to **Unfilled** status (the request will not go to **Retry**).* ○ Selecting this option forwards the ILL request to the next lender in the Lender List for this request. If your library is *the final* lender institution in the Lender List, selecting this option sets borrower's status for the ILL request to **Unfilled**. ○ If you *will be* able to provide the requested material at a later date, select the **Retry** option. ○ If you can *currently supply* similar material (for example, an earlier or later edition of the requested title), select the **Conditional** option and specify the appropriate conditions or restrictions). • **Shipped (non-returnable) -** This option indicates you have shipped a photocopy or digital image to the borrower. This option is only available from the Full Record Display. *The default **Reason/Condition** for this option is **Omit Condition**.* ○ Selecting this option sets borrower's status for the ILL request to **Shipped**. *This option should be selected when shipping **Non-returnable (copy)** requests only. When shipping **Returnable (loan)** requests, select the **Shipped** option.*	Stays in **Will Supply/In Process** for 730 days.
Renew/Overdue	Borrower requests loan renewal for title from lender *and* due date for the item has expired. You may respond to a **Renew/Overdue** request by selecting one of the following options from the **Status** menu: • **Accept Renewal -** This option indicates you accept the borrower's request for a loan renewal of the currently borrowed material. Borrower may retain the material for an additional period of time as specified in your library's Participant Record or in the ILL request. ○ Selecting this option sets borrower's status for the ILL request to **Accepted Renewal**. *If desired, you may grant the loan renewal for a greater or lesser period of time by changing the value in the **Due __ days from Receipt** in the Full Record Display. The new due date is calculated from the date the request was updated.* • **Reject Renewal -** This option indicates you reject the borrower's request for a loan renewal of the currently borrowed material. Borrower *must* return the borrowed material by the deadline date in the request.	Stays in **Renew/Overdue** for 730 days.

Status	Definition	Result if No Action is Taken
Renew/Overdue (Cont)	○ Selecting this option sets borrower's status for the ILL request to **Rejected Renewal**. • **Recall -** This option indicates you reject the borrower's request for a loan renewal of the currently borrowed material. Borrower *must* return the borrowed material as soon as possible. ○ Selecting this option sets borrower's status for the ILL request to **Recalled**. • **Check In -** This option indicates the lender has received the item from the borrower and the ILL transaction is completed. ○ Selecting this option sets borrower's status for the ILL request to **Complete**. The system marks the ILL transaction as complete and stores historical data pertaining to the completed transaction for statistical reports. • **Lost -** This option indicates that you suspect the item has been lost. ○ Selecting this option sets lender's status for the ILL request to **Lost**. *Depending on the standard practices and procedures for your consortium, it may be necessary to contact the borrower to aid in determining the actual physical status of the associated item before designating the item as **Lost**.* • **Overdue -** This option indicates borrower has not returned material to lender, and due date has passed. ○ Selecting this option sets borrower's status for the ILL request to **Renewal/Overdue**.	Stays in **Renew/Overdue** for 730 days.
Pending Cancel	Borrower has indicated that the patron no longer needs the item. You may respond to a **Pending Cancel** request by selecting one of the following options from the **Status** menu: • **Confirm Cancel –** This option indicates the ILL request is cancelled. ○ Selecting this option sets borrower's status for the ILL request to **Cancelled**. • **Reject Cancel -** This option indicates you reject the cancellation request, and will provide material to borrower as requested. ○ Selecting this option sets lender's status for this request to **Will Supply/In Process**.	Stays in **Pending Cancel** for *Days to Respond*.
Renew Pending	Borrower requests loan renewal for item from lender. You may respond to a **Renew Pending** request by selecting one of the following options from the **Status** menu: • **Accept Renewal -** This option indicates you accept the borrower's request for a loan renewal of the currently borrowed material. Borrower may retain the material for an additional period of time as specified on the request. ○ Selecting this option sets borrower's status for the ILL request to **Accepted Renewal**. *If desired, you may grant the loan renewal for a greater or lesser period of time by changing the value in the **Due __ days from Receipt** in the Full Record Display. The new due date is calculated from the date the request was updated. The "renewed to" date is calculated either from the original due date or from the date on which the status of the request was updated to Accept Renewal, based on the Calculate Renewed to Date selection in your library's Participant Record (see **Updating a Participant Record** on page **99** for details).* • **Reject Renewal -** This option indicates you reject the borrower's request for a loan renewal of the currently borrowed material. Borrower *must* return the borrowed material within the time period specified in your library's Participant Record. ○ Selecting this option sets borrower's status for the ILL request to **Rejected Renewal**. • **Recall -** This option indicates you reject the borrower's request for a loan renewal of the currently borrowed material. Borrower *must* return the borrowed material as soon as possible. ○ Selecting this option sets borrower's status for the ILL request to **Recalled**.	Midnight Processing moves request to **Overdue** after *Days to Return* has passed.

Status	Definition	Result if No Action is Taken
Renew Pending (Cont)	• **Check In -** This option indicates the lender has received the item from the borrower and the ILL transaction is completed. ○ Selecting this option sets borrower's status for the ILL request to **Complete**. The system marks the ILL transaction as complete and stores historical data pertaining to the completed transaction for statistical reports. • **Overdue -** This option indicates borrower has not returned material to lender, and due date has expired. ○ Selecting this option sets lender's status for the ILL request to **Renew/Overdue**.	Midnight Processing moves request to **Overdue** after *Days to Return* has passed.
Returned	Borrower has shipped material back to lender. You may respond to a **Returned** request by selecting one of the following options from the **Status** menu: • **Check In -** This option indicates the lender has received the item from the borrower and the ILL transaction is completed. ○ Selecting this option sets borrower's status for the ILL request to **Complete**. The system marks the ILL transaction as complete and stores historical data pertaining to the completed transaction for statistical reports.	Stays in **Returned** for 730 days.
ILL Review	*The **ILL Review** status is available only for systems that have enabled the optional "Modify Existing Request" functionality.* Lender has determined that the bibliographic record associated with the ILL request is not for the correct item. You may respond to an **ILL Review** request by selecting one of the following options from the **Status** menu: *Before changing item status, the ILL Request should be manually edited or "moved" to a different bibliographic record (see **Modifying an Existing Request** on page **61** for details).* • **Will Supply/In Process –** This option indicates you are working on the request or will fill the request, but have not yet sent, the requested material to the borrower. *The default **Reason/Condition** for this option is **Omit Reason**.* ○ Selecting this option sets lender's status for the ILL request to **Will Supply/In Process**. • **Retry -** This option indicates you are currently unable to supply the requested material, but *may be* able to supply the material at a later date. *The default **Reason/Condition** for this option is **Omit Reason**.* ○ Selecting this option sets borrower's status for the ILL request to **Retry**. ○ You may wish to include appropriate information detailing *when* the ILL request should be resubmitted in the History Notes. • **Conditional -** This option indicates you are able to supply the requested material under specified conditions or restrictions. *The default **Reason/Condition** for this option is **Other**.* ○ Selecting this option sets borrower's status for the ILL request to **Conditional**. ○ You may wish to include a *detailed description* of the conditions or restrictions in the History Notes. • **Will Not Supply –** This option indicates you are currently unable to supply the requested material to the borrower. *The default Reason/Condition for this option is Omit Reason [Unfilled].* *When a default lender is the only lender for a given request, and the default lender updates the status of the request to **Will Not Supply**, any **Reason/Condition** included in the request is considered the "final answer," and the request is moved to **Unfilled** status (the request will not go to **Retry**).* ○ Selecting this option forwards the ILL request to the next lender in the Lender List for this request. If your library is *the final* lender institution in the Lender List, selecting this option sets borrower's status for the ILL request to **Unfilled**.	Stays in **ILL Review** for 730 days.

Status	Definition	Result if No Action is Taken
ILL Review (Cont)	○ If you *will be* able to provide the requested material at a later date, select the **Retry** option. ○ If you can *currently supply* similar material (for example, an earlier or later edition of the requested title), select the **Conditional** option and specify the appropriate conditions or restrictions.	Stays in **ILL Review** for 730 days.
Cancel Shipped Request	Request for an item shipped by a lender has been cancelled by borrower. You may respond to a **Cancel Shipped Request** request by selecting one of the following options from the **Status** menu: • **Check In -** This option indicates the lender has received the item from the borrower and the ILL transaction is completed. ○ Selecting this option sets borrower's status for the ILL request to **Complete**. The system marks the ILL transaction as complete and stores historical data pertaining to the completed transaction for statistical reports.	Stays in **Cancel Shipped Request** for 730 days.
Lost	Requested/borrowed item has been declared lost by either borrower or lender. You may update the status of a **Lost** request by selecting the following option from the **Status** menu: • **Delete -** This option flags the associated request for deletion. The request is deleted during midnight processing. • **Check In –** This option indicates the lost item has been found by the lender. ○ Selecting this option sets borrower's status for the ILL request to **Complete**.	Stays in **Lost** for 730 days.
ISO Messages	A request appears in this category only when an ISO MESSAGE APDU is received. The ISO MESSAGE is a general message that may relate to a specific ILL request. When AGent receives a MESSAGE from an external trading partner, AGent takes the text/notes field from the MESSAGE and applies it to the **History Information** field of the ILL request referenced in the MESSAGE. A flag is added to the request, and AGent places a copy of the request in the ISO Messages folder. Because the MESSAGE APDU does not change the state of the AGent request, the request is still accessible in the appropriate status browse category. The request now includes a flag to indicate that a message/note needs to be read. Requests stay in the ISO Message category until the request is opened to the Full Record Display. At this point the flag disappears when the full record is displayed. The Full Record Display includes the following reminder at the top of the request: "This request history contains the text of an ISO Message from the borrower."	Request moves to the appropriate status after it has been read in the ISO Messages status.

Changing the Date Shipped

When setting the status for a request to **Shipped**, the system sets the **Date Shipped** for the request to the current calendar date by default. If the physical item will be shipped at a date later than the date at which the status of the request is set to shipped, you may wish to change the **Date Shipped** to reflect the actual date on which the item will be shipped.

To change the Date Shipped:

1. Access the Full Record Display for the request for which you wish to update the status (see ***Updating ILL Requests*** on page **32** for details).
2. Select **Shipped** from the **Status Options** menu.
3. Locate the **Date Shipped** field, and click the icon to select a new date from the Date Entry Calendar (see the ***System Basics User Guide*** *for details*).
4. Click the **Submit** button to change the status of the request.
    - The screen refreshes to display the message "Your interlibrary loan request (*request number*) has been successfully updated" along with the **Date Shipped**.

Additional ILL Statuses for External ISO Trading Partners

When communicating with an external ISO partner, i.e., a library that uses a non-AGent Resource Sharing ILL management software product, three additional options are available. The borrower may use these options for requests in all statuses other than Awaiting Approval. A lender may use these statuses for all statuses other than Pending. These options need to be applied to a specific request so they are available only from the Full Record Display and are not available in the summary Status Browse.

Repeat Last Message is used by either the SHAREit borrower or lender to resend the last ISO ILL message sent by SHAREit Resource Sharing. This is used if the recipient did not receive the previous message or did not process it properly.

Send Status Query permits you to ask the trading partner's ISO service provider about the status of a request. It permits either the borrower or lender to ask the ISO system about the status of the ILL request at the remote site. Because the ISO ILL Protocol permits libraries to keep separate copies of the request, it is possible that the lender would have updated the request to Shipped but the borrower thinks the request is still being processed.

Send General Message permits you to add text to the History Notes field and send it to the trading partner without changing the status of the request. AGent Resource Sharing uses the ISO Message message/APDU, which includes a field for a note that can link the general message to a specific ILL request.

Lender's Reasons/Conditions for Response

When updating the status of a request currently at a status of **Pending**, **Will Supply/In Process** or **Pending Cancel**, it is necessary to include a reason or condition along with the status change. Select the appropriate reason or condition from the **Reason/Condition** menu for *each title* in the list *or* apply the same reason or condition to *all titles* in the list using the **Apply to All Title(s) on this page - Reason/Condition** menu. The *specific* reasons/conditions available depend on the current status of the request, and on the status to which you are updating the request.

*When updating request status to **Will Not Supply**, each option in the **Reason/Condition** menu is appended with the notation **[Retry]** or **[Unfilled]** to indicate which reasons/conditions are terminal (requests will go to **Unfilled**) and which are non-terminal (requests will go to **Retry**).*

- **At bindery** – Requested item is currently at bindery and is not available for immediate loan. *This reason/condition is available when updating request status to* **Retry**, **Will not Supply**, **Will Supply/In Process**.
- **Being processed for supply** – Requested item is owned by lender, but has not been processed for patron use. *This reason/condition is available when updating request status to* **Will Supply/In Process**.
- **Charges** – Borrower is required to pay fee/charges to obtain requested item, but no value is included in the **Max Cost** field in the ILL request. *This reason/condition is available when updating request status to* **Conditional**, **Retry**, **Will not Supply**.
- **Client signature required** – Patron must sign signature sheet shipped with the requested item. *This reason/condition is available when updating request status to* **Conditional**, **Shipped non-returnable**, **Shipped**.
- **Cost exceeds limit** – Fees/charges required when borrowing requested item exceed **Max Cost** specified in request. *This reason/condition is available when updating request status to* **Conditional**, **Retry**, **Will not Supply**.
- **Electronic delivery** – Lender will provide requested item in digital format via electronic delivery. *This reason/condition is available when updating request status to* **Will Supply/In Process**.
- **Expiry not supported** – Lender does not support processing requests for which an expiry date is specified. *This reason/condition is available when updating request status to* **Will not Supply**.
- **In process** - Item has been received but is not yet ready for use. *This reason/condition is available when updating request status to* **Retry**, **Will not Supply**, **Will Supply/In Process**.

- **In use, on loan** – Requested item is currently in use by local patron, or on loan to another borrower. *This reason/condition is available when updating request status to* **Retry**, **Will not Supply**, **Will Supply/In Process**.
- **Lacking** – Title owned by lender, but not the requested component or pages. *This reason/condition is available when updating request status to* **Will not Supply**.

  *Selecting **Lacking** with an accompanying change in status to **Will not Supply** will place the request in borrower's **Unfilled** status.*
- **Lacks copyright compliance** – For copy requests, ILL request does not include necessary copyright compliance information. *This reason/condition is available when updating request status to* **Conditional**, **Retry**, **Will not Supply**.
- **Library use only** – Requested item is available for loan *only* for in-library use by the borrower. *This reason/condition is available when updating request status to* **Conditional**, **Shipped**, **Shipped (non returnable)**.
- **Locations not found** – No potential lender has been identified. *This reason/condition is available when updating request status to* **Will not Supply**.

  *Selecting **Locations not found** with an accompanying change in status to **Will not Supply** will place the request in borrower's **Unfilled** status.*
- **Lost –** Requested item has been declared **Lost**. This reason/condition is available when updating request status to **Will not Supply**.
- **Mandatory messaging not supported** – Lender does not provide/support ISO mandatory messaging. *This reason/condition is available when updating request status to* **Will not Supply**.
- **No reproduction** – Reproduction of the requested item is not authorized/allowed by the lender. *This reason/condition is available when updating request status to* **Conditional**, **Shipped**, **Shipped (non-returnable)**.
- **Non-circulating** – Requested item is not available for loan (for example, a reference-only manuscript). *This reason/condition is available when updating request status to* **Will not Supply**.

  *Selecting **Non-circulating** with an accompanying change in status to **Will not Supply** will place the request in borrower's **Unfilled** status.*
- **Not found as cited** – Item cannot be located using item identification information provided in the ILL request. *This reason/condition is available when updating request status to* **Retry**, **Will not Supply**.

  *Selecting **Not found as cited** with an accompanying change in status to **Will not Supply** will place the request in borrower's **Unfilled** status.*
- **Not on shelf** – Requested item is available in lender's collection and is not currently charged out, but is currently unavailable. *This reason/condition is available when updating request status to* **Will not Supply**.
- **Not owned** – Requested item is not in lender's collection. *This reason/condition is available when updating request status to* **Will not Supply**.
- **Omit condition** – No special condition applies to requested item. *This reason/condition is available when updating request status to* **Shipped non-returnable**, **Shipped**.
- **Omit reason** – No special reason applies to requested item. *This reason/condition is available when updating request status to* **Retry**, **Will not Supply**, **Will Supply/In Process**.
- **On hold** – An outstanding hold is currently placed on the requested item by another borrower. *This reason/condition is available when updating request status to* **Retry**, **Will not Supply**, **Will Supply/In Process**.
- **On order** – Requested item is not currently available, but item is on order by lender. *This reason/ condition is available when updating request status to* **Retry**, **Will not Supply**, **Will Supply/In Process**.

- **On reserve** – Requested item is owned by lender, but is restricted to local use. *This reason/condition is available when updating request status to* **Will not Supply**.
- **Other** – Other reasons/conditions/requirements not supported by ISO standard responses. *This reason/condition is available when updating request status to* **Conditional**, **Retry**, **Shipped non-returnable**, **Shipped**, **Will not Supply**, **Will Supply/In Process**.
- **Policy problem** – Lender does not have policy in place to govern/support fulfillment of the ILL request. *This reason/condition is available when updating request status to* **Will not Supply**.
- **Poor condition** – Degraded physical condition of requested item prohibits interlibrary loan or reproduction. *This reason/condition is available when updating request status to* **Will not Supply**.

  *Selecting **Poor condition** with an accompanying change in status to **Will not Supply** will place the request in borrower's **Unfilled** status.*
- **Preferred delivery time not possible** – Requested item cannot be delivered by **Deadline** specified in ILL request. *This reason/condition is available when updating request status to* **Will not Supply**.
- **Prepayment required** – Borrower is required to pay fee/charges in advance to obtain requested item. *This reason/condition is available when updating request status to* **Conditional**, **Retry**, **Will not Supply**.
- **Proposed delivery service** – Indicates a specific delivery service/method should be used to fulfill the ILL request. *This reason/condition is available when updating request status to* **Conditional**.
- **Requested delivery services not supported** – Lender does not support delivery of items utilizing requested delivery service. *This reason/condition is available when updating request status to* **Will not Supply**.
- **Special collections supervision required** – Borrower must provide special collections or rare book room supervision to manage requested item during loan period. *This reason/condition is available when updating request status to* **Conditional**, **Shipped (non-returnable)**, **Shipped**.
- **Volume, issue not yet available** – Title owned by lender, but the requested component has not yet been received (is not yet available). *This reason/condition is available when updating request status to* **Retry**, **Will not Supply**.

Updating Trading Partner Status

In some cases, you can update the status of a request in the **Items awaiting trading partner response** fields if your trading partner has failed to do so, or if you wish to modify an in-process request.

Updating Lender's Status

As a borrower, you can update lender's status for requests in the **Borrower Requests (Status Browse) - Items awaiting trading partner response** field, for the following status categories, under the conditions described.

- If you have received material from a lender, but the lender has failed to update the status of the associated request from **Pending**, **Will Supply/In Process** or **Pending Cancel**, you can change the status of the request to **Received**. Selecting this option sets *borrower's* status for the request to **Received**.
- If you no longer wish to borrow a requested item, and the current *lender's* status for the request is **Pending** or **Will Supply/In Process**, you can change the status of the request to **Request Cancel**. Selecting this option sets *lender's* status for the request to **Pending Cancel**.
- If an item has been lost, and the current *lender's* status for the request is **Pending**, **Will Supply/In Process**, **Renew/Overdue**, **Pending Cancel**, **Renew Pending** or **Returned**, you can change the status of the request to **Lost**. Selecting this option sets *lender's* status for the request to **Lost**.

  Depending on the standard practices and procedures for your consortium, it may be necessary to contact the lender to aid in determining the actual physical status *of the associated item before designating the item as **Lost**.*

- If you have located and returned an item previously flagged as **Lost**, you can change the status of the request to **Returned**. Selecting this option sets *lender's* status for the request to **Returned**.
- If you have returned an item with a *lender's* status of **Renew/Overdue** or **Renew/Pending**, you can change the status of the request to **Returned**. Selecting this option sets *lender's* status for the request to **Returned**.
- If desired, you may select to mark a request with a current *lender's* status of **Lost** for deletion.

  Depending on the standard practices and procedures for your consortium, it may be necessary to contact the borrower to aid in determining the actual physical status *of the associated item before designating the item as* ***Lost****.*

Updating Borrower's Status

As a lender, you can update borrower's status for requests in the **Lender Requests (Status Browse) - Items awaiting trading partner response** field, for the following status categories, under the conditions described.

- If you have received material returned from the borrower, but the borrower has failed to update the status of the associated request from **Not Received**, **Accepted Renewal**, **Recalled**, **Shipped**, **Received**, **Rejected Renewal**, **Overdue**, or **Cancel Shipped Request**, you can change the status of the request to **Check In**. Selecting this option sets *borrower's* status for the request to **Complete**.
- If you have set the status for a *returnable* request to **Shipped** but have not yet physically shipped the item, or if you have set the status for a *non-returnable* or reference request to Shipped, and you wish to return the status of the request to **Pending**, you can choose **Undo Shipped**. Selecting this option sets *lender's* status for the request to **Pending**.

  The ***Undo Shipped*** *option is available* only *if the* ***Undo Shipped Item*** *permission is enabled for your user account (see the* **User Administration User Guide** *for more information).*

- If you have shipped a *returnable* item to a borrower, and the borrower's current status is **Not Received**, you can change the status of the request to **Lost**, **Recall**, **Check in**, or **Overdue**. If you have shipped a *non-returnable* item to a borrower, you can change the status of the request to **Lost**. If you have both *returnables* and *non-returnables* in the summary list and if you want to update a returnable request to **Recall**, **Check in**, or **Overdue**, you must make the change from the Full Record Display.
- If an item has been lost, and the current *borrower's* status for the request is **Not Received**, **Accepted Renewal**, **Recalled**, **Shipped**, **Received**, **Rejected Renewal**, **Overdue**, you can change the status of the request to **Lost**. Selecting this option sets *lender's* status for the request to **Lost**.

  Depending on the standard practices and procedures for your consortium, it may be necessary to contact the borrower to aid in determining the actual physical status *of the associated item before designating the item as* ***Lost****.*

- If you wish to recall an item prior to its due date, and the *borrower's* status for the request is **Accepted Renewal**, **Shipped**, **Received**, **Rejected Renewal** or **Overdue**, you can change the status of the request to **Recall**. Selecting this options sets *borrower's* status for the request to **Recalled**.
- If an item on loan is overdue, and the current *borrower's* status for the request is **Accepted Renewal**, **Shipped**, **Received**, **Rejected Renewal**, **Overdue**, you can change the status of the request to **Overdue**. Selecting this option sets *borrower's* status for the request to **Overdue**.

Working with Due Dates

The **Due Date** is defined as the day on which the loaned item is due back at the lending library. It applies *only* to **Returnable (loan)** requests. The system uses the **Deadline Date** to calculate when a request is moved to the next lender, becomes overdue, etc.; however, the label "Deadline Date" is not be displayed on the ILL request form. It may be necessary to update the value in the **Days to Return** in your library's Participant Record (see ***Maintaining Participant Records*** on page **99** for details) in order to allow sufficient time for the patron to read the item and for the item to be returned.

Calculating the Due Date from the Lending Policy Information

*The following information applies only to libraries that have selected the **Use My Library's Lending Policies** checkbox on the Lending Policy screen (available through the **Maintain Participant Record** function - see **Maintaining Participant Records** on page **99** for details).*

If the ILL request is for an item in a Lending Policy category with an asterisk (see ***Entering Lending Policies*** on page **123** for more information), the system checks the loan period column for the requested material type (if it is indicated that the library lends that material type in the **Lend** column) and determines the value for the loan period. If the library has not changed the default value of zero, the system disregards the value (as it indicated unlimited) and use the value in the **Days to Return** field in the Participant Record. However, if the lending library has indicated a value *other than* zero, the system uses the specified value to *override* the **Days to Return** value. If the request was created from a Blank Request Form or is of a format that *does not* have the asterisk, the system disregards the Lending Policy and uses the **Days to Return** value.

Calculating the Renewal Date from the Lending Policy Information

*The following information applies only to libraries that have selected the **Use My Library's Lending Policies** checkbox on the Lending Policy screen.*

If the borrower requests a renewal, the system checks the lender's **Renewal Loan Period** in its Lending Policy for items with an asterisk. If the value is zero, the system applies the **Days to Return** value. If the library has entered a value *other than* zero, that value overrides the **Days to Return** value and is used to calculate the "renewed to" due date. If the request was created from a Blank Request Form or is of a format that *does not* have the asterisk, the system disregards the Lending Policy and uses the value in the **Days to Return** field.

The "renewed to" date is calculated either from the original due date or from the date on which the status of the request was updated to **Accept Renewal**, based on the **Calculate Renewed to Date** selection in your library's Participant Record (see ***Updating a Participant Record*** on page **99** for details).

Using Specific Due Dates in Updating ILL Requests

A due date can be updated only from the Full Record Display for an ILL request. If the status of an ILL request is updated from a Status Browse List, the system supplied default due date is used.

Updating Lender's Pending Status to Shipped: Full Record Displays for ILL requests in lender's **Pending** status include a **Due Date** field. The **Due Date** field is pre-filled with a calculated due date from the **Days to Return** value specified in the lender's Participant Record. For example, if a lender updates a request on March 1, 2009 and the **Days to Return** value is 21, then the *default* date in the **Due Date** field is March 22, 2009. When the **Due Date** is updated and the revised form is submitted, the screen will refresh and the **Due Date** field and its value will be included on the updated request form.

Updating Borrower's Shipped Status to Received: When the status of an ILL request is set to **Shipped**, the **Due Date** specified by the lender is shown in the **Due Date** field. A read-only **Date Shipped** field shows the date on which the requested item was shipped (the date on which the change to **Shipped** status occurred). Full Record Displays for ILL requests in borrower's **Shipped** status include a **Date Received** field. The **Date Received** field is pre-filled with the current calendar date. If appropriate, the borrower can change the **Date Received** to a day in the past (in cases where the item was *physically received* on a day *before* the status of the request was set to **Received**). The **Date Received** *cannot* be set to a *future* date (*later than* the current calendar date). In cases where the borrower changes the **Date Received** field to a "past day", the request **History Information** will indicate the *actual* date on which the status of the request was updated (the date of updating the request *cannot* be postdated).

Updating Borrower's Received Status to Renew Pending: Full Record Displays for ILL requests in borrower's **Received** status include a **Date Renewal Requested** field. The **Date Renewal Requested** field is pre-filled with the current calendar date. If appropriate, the borrower can change the **Date Renewal Requested**. In cases where the borrower changes the **Date Renewal Requested** field to a day other than the date on which the request was updated, the request **History Information** will indicate the *actual* date on which the status of the request was updated. If the lender grants the renewal, the value in the **Due Date** field is updated to reflect the "renewed to" date.

Updating Borrower's Received Status to Returned: Full Record Displays for ILL requests in borrower's **Received** status include a **Date Returned** field. The **Date Returned** field is pre-filled with the current calendar date. If appropriate, the borrower can change the **Date Returned** to a day in the past (in cases where the item was *physically returned* on a day *before* the status of the request was set to **Returned**). The **Date Returned** *cannot* be set to a *future* date (*later than* the current calendar date). In cases where the borrower changes the **Date Returned** field to a "past day", the request **History Information** will indicate the *actual* date on which the status of the request was updated (the date of updating the request *cannot* be postdated).

Updating Lender's Returned Status to Complete (Checked In): Full Record Displays for ILL requests in lender's **Returned** status include a **Date Checked In** field. The **Date Checked In** field is pre-filled with the current calendar date. If appropriate, the lender can change the **Date Checked In** to a day in the past (in cases where the item was *physically checked in* on a day *before* the status of the request was set to **Checked In**). The **Date Checked In** *cannot* be set to a *future* date (*later than* the current calendar date). In cases where the borrower changes the **Date Checked In** field to a "past day", the request **History Information** will indicate the *actual* date on which the status of the request was updated (the date of updating the request *cannot* be postdated).

Printing ILL Requests

There are five options for printing ILL requests:

- Print All – With Lenders
- Print All – Without Lenders
- Print All – New Requests
- Print All – New Requests with History
- Pick Lists (for lenders only)

You can print ILL requests from each active status category.

To print ILL requests:

1. From an open status browse list (see ***Using the Request Manager*** on page **29** for details), select the appropriate report type:
   - To print *all requests* in the currently selected status category (including the associated Lender List for each request), click the **Print All – With Lenders** button.
   - To print *all requests* in the currently selected status category (*without* the associated Lender List for each request), click the **Print All – Without Lenders** button.
   - To print all *new* requests in the currently selected status category, click the **Print All - New Requests** button.
     - Once a report for a request has been printed, the system "marks" the request to indicate it has been printed.
   - To print all *new* requests (*including* **History Notes**) in the currently selected status category, click the **Print All – New Requests with History** button.
   - To print all *new* requests in the **Pending** status category, click the **Pick List** button. The "Pick List" is sorted alphanumerically by title or call number, as appropriate.
2. An *additional* browser window opens, displaying the formatted ILL requests.
   - The *default* number of request to display per screen is 200. If the number of requests to print *exceeds* 200, a confirmation screen displays. You may choose to *increase* or *decrease* the number of requests displayed per screen.

- Enter the desired number of requests to display per screen in the **Maximum number of records displayed per screen** text box, then click the **Submit** button.
- The screen refreshes to display the specified number of formatted ILL requests. Links are provided at the top of the screen to display additional requests.

3. Use the standard procedures for your web browser to print the formatted ILL requests.

*The pick list includes only new requests. Once a request has been printed, it is deleted from the pick list, but can be printed again using the **Print All - With Lenders** or **Print All - Without Lenders** buttons.*

Chapter 4. BORROWER FUNCTIONS

Overview

The **ILL Admin Staff Menu** provides three functions for tracking and processing requests as a borrower. In addition to summarizing these three functions, this chapter also describes the fields in the Full Record Display and summarizes the Copyright Compliance Tracking function. Borrower functions available in the **ILL Admin Staff Menu** include the following:

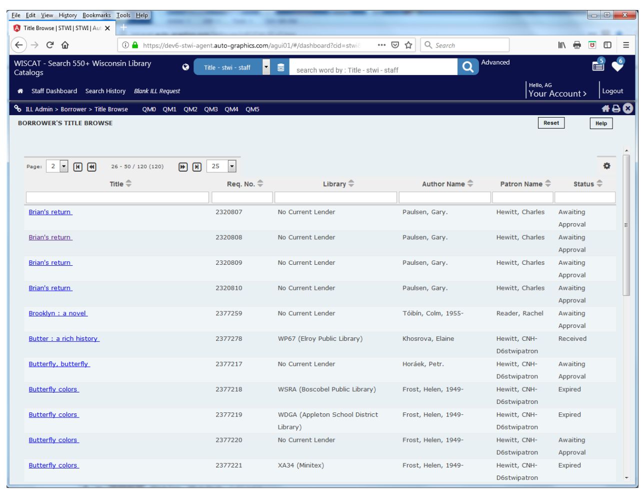
- **Title Browse** - lets you browse a list of *all* active and completed ILL requests you have submitted *as a borrower*, by the title of the material requested. The Full Record Display for any active and completed ILL request you have submitted can be accessed from the Title Browse screen.
- **Request Number Search** - lets you locate the Full Record Display for a *specific* ILL request you have submitted using the *system-assigned* Request Number.
- **Patron Browse** - lets you browse a list of *all* active and completed ILL requests you have submitted *as a borrower*, by the last name of the patron who requested the material. The Full Record Display for any active and completed ILL request you have submitted can be accessed from the Patron Browse screen.

Browsing By Title

You can browse a list of all active and completed ILL requests submitted by your library *as a borrower*, using the title of the material requested as the search criteria.

To view the Title List:

1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Borrower - Title Browse**.
   - The Borrower's Title Browse screen displays.
   - The list is arranged alphabetically by title, and includes the name of the patron who submitted the request and current status information. If there are two requests with the same title, they are displayed in Request Number order.
2. If desired, you can reconfigure, sort and filter table content (see the ***System Basics User Guide*** for details).
3. Use the browse bar tools to browse the list:



Borrower's Title Browse Screen

   - Use the **Pages** menu to scroll to a selected page of the list.
   - Use the "titles per page" menu to specify the number of titles shown on each page of the list; **25**, **50**, **100** or **250**.
   - If the list is *more than* one page long, use the (previous page) and (next page) buttons to scroll the list one page at a time. Use the (first page) and (last page) buttons to scroll to the first or last page of the list, respectively.

To browse ILL requests by title:

1. From the Borrower's Title Browse screen, enter the title of the requested item in the **Title** text box.
   - When browsing by title, the system reads the title as a string of characters (rather than as separate words), reading each character from left to right.
   - You may enter either a partial or complete title as the search criteria.
2. The list updates as you type to display only those titles that match your search term. The first occurrence of the title appears as the first entry in the list.

To view the Full Record Display for an ILL request:

- Click a **Title** link in the list to display the Full Record for that request.
- To return to the Title Browse screen, click the **Go Back** button on the Full Record Display.

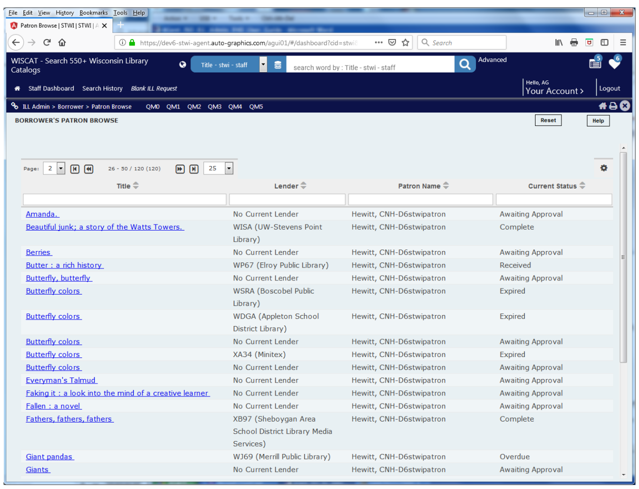
Browsing By Patron

You can browse a complete list of all active and completed ILL requests submitted by your library, arranged in alphabetic order by the name of the patron who submitted the request. If *multiple* active requests exist for a *single patron*, the requests for the patron are listed in alphabetical order, by title.

***Patron Browse** is not available to lenders.*

To view the Patron Browse list:

1. From the **Ill Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Borrower - Patron Browse**.
   - The Borrower's Patron Browse screen displays.
2. If desired, you can reconfigure, sort and filter table content (see the ***System Basics User Guide*** for details).
3. Use the browse bar tools to browse the list:
   - Use the **Pages** menu to scroll to a selected page of the list.
   - Use the "titles per page" menu to specify the number of titles shown on each page of the list; **25**, **50**, **100** or **250**.



Borrower's Patron Browse Screen

   - If the list is *more than* one page long, use the (previous page) and (next page) buttons to scroll the list one page at a time. Use the (first page) and (last page) buttons to scroll to the first or last page of the list, respectively.

To browse ILL requests by patron name:

1. From the Borrower's Patron Browse screen, enter the name of the patron in the **Patron Name** text box.
   - When browsing by patron, the system reads the patron name as a string of characters (rather than as separate words), reading each character from left to right.

- You may enter either a partial *or* complete patron last name as the search criteria. In order to locate specific ILL requests submitted by a patron, you *must* enter the patron name *exactly* as it was entered when the ILL request was submitted, *last name first*.

2. The list updates as you type to display only those patrons that match your search term. The first occurrence of the patron appears as the first entry in the list.

To view the Full Record Display for an ILL request:

- Click a **Title** link in the list to display the Full Record Display for that request.
- To return to the Borrower Patron Browse screen, click the **Go Back** button on the Full Record Display.

Searching By Request Number

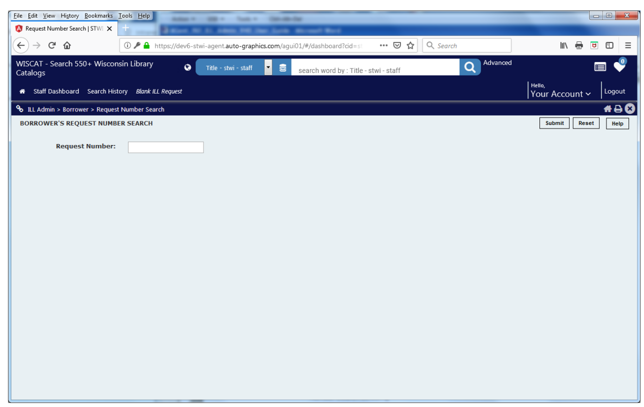
The system automatically assigns a Request Number to each ILL request generated by all *borrowers* in the consortium. Depending on the activity in the consortium, a borrower's requests may not have sequential numbers. Once the ILL request has been created, the Request Number is shown on the Full Record Display for that request. You can use the Request Number to locate the Full Record Display for any ILL request submitted *by your library as a borrower*.

*Customer SuperUsers can perform a "global" Request Number search across all libraries in a consortium or collective. See **Global Request Search** on page **176** for details.*

To perform a Request Number search:

1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Borrower - Request Number Search**.
   - The Borrower's Request Number Search screen displays.
2. Enter the Request Number assigned by the system in the **Request Number** text box. (To clear the contents of the **Request Number** text box, click the **Reset** button.)

   You must enter a complete ***Request Number****.*



Borrower's Request Number Search Screen

3. Click the **Submit** button.
   - If the Request Number search is *successful*:
     - The Full Record for the request displays.
   - If the Request Number search is *unsuccessful*:
     - The message "Request Number not found" displays. Click **Go Back** to return to the Request Number Search screen.
     - Re-enter the **Request Number**, then click the **Submit** button.

     If you enter a Request Number for a request you have received as a lender, the system returns the message "Request not found."

Full Record Display

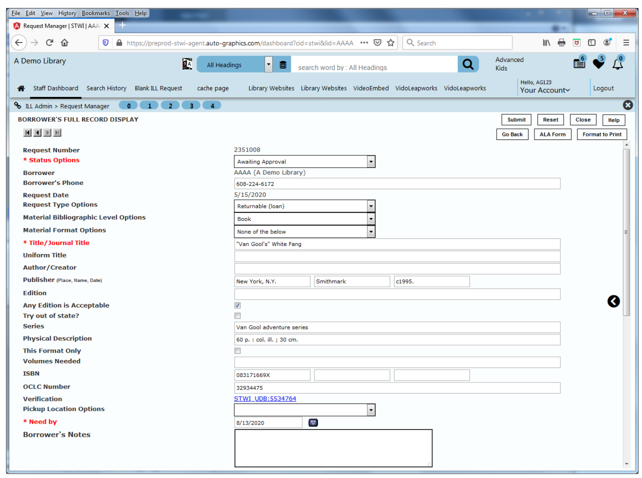
The Borrower Full Record Display provides complete bibliographic information for the material requested, including control (accession) number if the request was generated from an Auto-Graphics union catalog, and the origination, need by and deadline dates. It also provides access to the borrower's and lender's address information, special instructions, the ILL request history, and patron information.

The Full Record Display for any ILL request may be accessed using the Request Manager (see ***Using the Request Manager*** on page **29** for details), Title Browse (see ***Browsing By Title*** on page **55** for details) or Patron Browse (see ***Browsing By Patron*** on page **55** for details), or by using Request Number Search (see ***Searching By Request Number*** on page **56** for details).

The Full Record Display may include both mandatory (system default) and optional fields. The content and arrangement of the Full Record display is determined by your ILL System Administrator. Some fields may not be included in the Full Record Display for your library or consortium. Additionally, the Full Record may contain up to six "customer specified" fields specific to your library or consortium.

To view and edit the Full Record Display:

*You may modify or update any information contained in a text box on the Full Record Display by selecting and over-typing the desired information. Depending on the type of request and current **Status**, some fields may not be displayed or editable.*



Borrower's Full Record Display

- If your library has enabled the "owned by this library" feature, a 🏠 icon is displayed in the Awaiting Approval Status Browse List (see ***Using the Request Manager*** on page **29** for details) next to *all requests* for which your library holds a copy of the title, and the Full Record Display for the request includes the message "This item is owned by your library" at the top of the screen.
- If the request has been selected for deletion, the notation "Request Number (####) has been scheduled for deletion" at the top of the screen.
- The Library Code (followed by your library's name) for your library is shown in the **Borrower** field.
- The current status of the request is shown in the **Status** field.
  - Depending on the current status of the request, the **Status** field *may* provide a drop-down menu allowing you to advance the status of the request (see ***Borrower's ILL Status Definitions*** on page **34** for details), or to update *lender's* status for the request (see ***Updating Lender's Status*** on page **49** for details).
  - Depending on the current status of the request, the **Get Permissions (Copyright Clearance Center)** field will include a link to the Copyright Clearance Center for *all* **Non-returnable (copy)** requests (see ***Accessing the Copyright Clearance Center*** on page **69** for more information).
- The *unique* system-assigned control number for the ILL request is shown in the **Request Number** field.
- The **Request Type** field indicates whether the request is to borrow (**Returnable (loan)**) or photocopy (**Non-returnable (copy)**) the requested material.
  - For requests with a current status of **Awaiting Approval**, **Unfilled** or **Retry**, the **Request Type** field provides a drop-down menu allowing you to change the request type.

- Material type and format for the requested material are shown in the **Material Bibliographic Level** and **Material Format** fields.
- Bibliographic information for the requested material is shown in the **Title/Journal Title**, **Uniform Title**, **Author/Creator**, **Publisher (Place, Name, Date)**, **Publisher Number**, **Publisher Source**, **Edition**, **ISBN**, **Library of Congress Control Number**, **ISSN**, **Series**, **Volumes Needed**, **OCLC Number**, **Other Standard Identifier**, **Item Barcode** and **Call Number and Location** fields, as appropriate.
- The **Verification** field shows the appropriate reference number for verification of the title, and includes the name of the database from which the record was taken (this field shows the accession number assigned by Auto-Graphics for the title the request was created from a record in the union catalog).
  - If desired, you may click the **Verification** link to view and/or print the bibliographic record from your library's union catalog (in *MARC format*) for the requested material.
- The **Any Edition is Acceptable** field indicates whether or not the request may be filled with an edition *other than* the edition specified.

  *The **Any Edition is Acceptable** field is* informational only. *It does not affect the lender build process, or aid in determining whether or not a request should be forwarded to a specific lender.*
- The **This Format Only** field indicates whether or not the request may be filled with an item of a format *other than* the format specified.
- The name of the current lender, and lender's contact information, is shown in the **Lender**, **Lender's Email**, **Lender's Fax** and **Lender's Phone** fields.
  - The **Lender's Email** field serves as a link to launch the *default* email client for your workstation to allow you to send an email to the current lender for the request (see ***Emailing the Lender*** on page **62** for details).

    *The **Lender's Email** field is not shown for requests with a status of **Awaiting Approval**, **Cancelled**, **Complete**, **ILL Review**, **Passed to Local System**, **Retry** or **Unfilled**.*
- For **Non-returnable (copy)** requests *only*: Article information is shown in the **Article Title**, **Article Author**, **Article Information (Volume, Issue, Pages)** and **Article Date** fields. The copyright compliance is shown in the **Copyright Compliance** field once the request has been submitted to the lender.
- If fees or other charges are associated with the request, you may enter the appropriate amount in the **Charges** field.
- The **Document URL** field displays if the lender includes a link to the electronic version of the requested item. The field shows the currently entered Uniform Resource Locator, if any. The **Document URL** serves as a link to the associated electronic resource. When the link is selected, the associated electronic resource displays in an *additional* browser window.
- Date-related information for the ILL request is shown in the **Request Date**, **Need by**, **Show Date**, **Date Shipped**, **Date Received**, **Due Date**, **Date Renewal Requested**, **Date Returned** and **Date Checked In** fields.
  - The **Request Date** field shows the date and time your patron or library created the ILL request.
  - The **Need By** field shows the calendar date by which your library requires the requested material.
  - The **Show Date** shows the calendar date on which the requested item is intended for exhibition or display.
  - The **Date Shipped** field shows the date on which the item was shipped by the lending library.
  - The **Date Received** field shows the date on which the item was received by your library. Depending on the status of the request, this field may include a Date Entry Calendar (see the ***System Basics User Guide*** for details), allowing you to specify the date the item was received.
  - The label and date shown for the **Due Date** field varies, based on the current status of the request (see ***Working with Due Dates*** on page **50** for more information).

  - The **Date Renewal Requested** field shows the date on which you requested a renewal from the lending library. Depending on the status of the request, this field may include a Date Entry Calendar (see the ***System Basics User Guide*** for details), allowing you to specify the date on which the renewal was requested.
  - The **Date Returned** field shows the date on which the item was returned to the lending library by your library. Depending on the status of the request, this field may include a Date Entry Calendar (see the ***System Basics User Guide*** for details), allowing you to specify the date the item was returned.
  - The **Date Checked In** field shows the date on which the item was received and checked in by the lending library.

- The **Max Cost** text box shows the *maximum* price the patron or borrower is willing to pay for the material requested.
- The **Lender List** shows the lenders to which your library has selected to submit the ILL request (only those libraries that have not yet responded are shown in the list). Lenders are listed in descending order of preference, as determined by the borrower.
  - Each entry in the **Lender List** shows the Library Code for the lender, and may also include lender's Days to Respond, and call number (or other identifier) for the requested material.
  - If desired, you can edit the **Lender List** to add, update or delete libraries from the list (see ***Editing the ILL Lender List*** on page **63** for details).
- Information related to the patron who submitted the request is shown in the **Patron's First Name**, **Patron's Middle Name**, **Patron's Last Name**, **Patron's Library Card Number**, **Patrons Address 1**, **Patrons Address 2**, **Patrons Address 3 (City, State, Zip)**, **Patron's Program and Course**, **Patron's Status and Year**, **Patrons Contact 1** and **Patrons Contact 2** fields. The location from which the patron may pick up the requested item is shown in the **Pickup Location** drop-down menu (see ***Managing ILL Pickup Locations*** on page **116** for details). Any notes or special instructions included by the patron are shown in the **Patron's Notes** field. If charges or fees are associated with the request, the patron's method of payment is shown in the **Patron's Payment Method** field. If desired, the patron's method of payment can be changed using the **Patron's Payment Options** drop-down menu.

  Patron information is not made available to the lenders to which the ILL request is submitted.

- The **Ship to Name**, **Ship to Address 1**, **Ship to Address 2**, **Ship to Address 3 (City, State, Zip)** and **Ship to Country** fields show the shipping address for your library, taken from your library's Participant Record.
- Shipping information is shown in the **Shipped Via** and **Shipper's Tracking Number** fields. If multiple items or pages were supplied when filling the request, the appropriate amount is shown in the **Number of Pieces/Pages Shipped** field. If the items supplied when filling the request were insured, the appropriate amount is shown in the **Insured for** field.
- The **Return to Name**, **Return to Address 1**, **Return to Address 2**, **Return to Address 3 (City, State, Zip)** and **Return to Country** fields show the shipping address for the Lender, taken from the lender's Participant Record.

  *The "return address" fields are not shown on Full Record Displays with a status of **Awaiting Approval**.*

- Notes, special instruction and/or restrictions on lending the requested item are shown in the **Current Lender's Note**, **Lenders' Notes** and **Lending Restrictions** fields.
- You may also choose to:
  - View History Information (see ***Viewing ILL Request History*** on page 64 for details) and add or edit Borrower's Notes (see ***Entering Borrower's Notes*** on page 65 for details).
  - View and modify patron information (see ***Viewing and Editing Patron Information*** on page 66 for details)
  - You may also, in certain cases, override Lender's status for the request (see ***Updating Lender's Status*** on page **49** for details).

  - Requests with a status of **Cancelled**, **Patron Cancellation Requests**, **Retry** or **Unfilled** include a **For Patron: Why Request was not Filled** field. If appropriate, you may enter any explanatory text for the patron indicating the reason that the request was not filled (item is owned locally, **Need By** date was too soon, etc.). Text entered in this field is viewable by the patron through the **ILL Request Tracking** feature. Text is displayed to the patron in the **Status** field under the heading” **Note**.”

    Depending on the current status of the request, some fields may be unavailable for modification.

- When all desired information has been entered or edited, click the **Submit** button to submit your changes to the Full Record Display.

To print the Full Record Display:

1. Click the **Format to Print** button.
    - An *additional* browser window opens, displaying the formatted ILL request.
2. Use the standard procedures for your web browser to print the formatted ILL request.

To download the ALA Form:

- To download the ALA Form in .pdf format, click the **ALA Form** button, then use the standard procedures for your web browser to download and save the file.

To exit the Full Record Display:

Click the **Go Back** or **Close** button to return to the previous browse list.

Modifying an Existing Request

Only Library SuperUsers or Customer SuperUsers can modify an existing ILL request.

In some cases, it may be determined that the bibliographic record associated with an ILL request is not for the correct item. Such requests in the **Awaiting Approval**, **Retry**, **Expired**, or **Canceled** status may be placed in **ILL Review** status for review and modification (see ***Borrower's ILL Status Definitions*** on page **34** for more information). Individual fields in the request may be manually edited, or the request may be associated with an alternate bibliographic record appropriate for the item being requested.

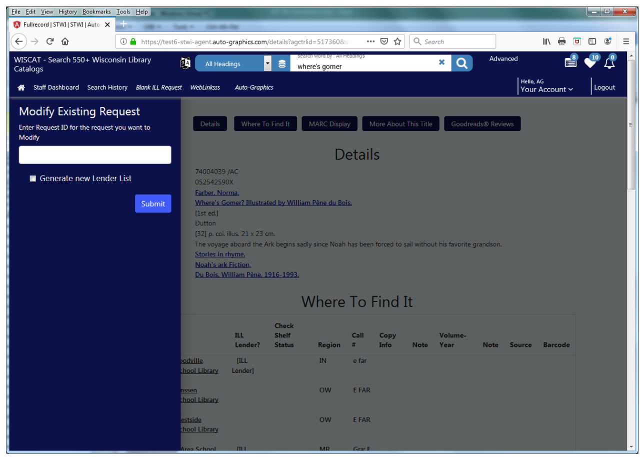
*The **ILL Review** status is available only for systems that have enabled the optional “Modify Existing Request” functionality.*

To manually modify an existing request:

1. Place the desired request in **ILL Review** status (see ***Updating ILL Requests*** on page **32** for details).
    - Requests can be moved to **ILL Review** status from **Awaiting Approval**, **Retry**, **Expired**, or **Canceled** status.
2. Access the Full Record Display for the request (see ***Full Record Display*** on page **61** for details).
3. Edit the request as desired.
    - Editing is limited to the following fields: **Request Type**, **Material Bibliographic Level**, **Material Format**, **Title/Journal Title**, **Author/Creator**, **Publisher**, **Publisher Number**, **Publisher Source**, **Series**, **Edition**, **Physical Description**, **ISBN**, **ISSN**, **OCLC Number**, **Other Standard Identifier**, **Source of Item Information**, **Source of Article Citation**, **Article Author**, **Article Title**, **Article Information (Vol, Issue, Pages)**, and **Article Date**.
4. Enter at least one lender in the **Lender List** (see ***Editing the ILL Lender List*** on page **63** for details).
5. Apply the desired status to the ILL request (see ***Borrower's ILL Status Definitions*** on page **34** for more information).

To modify an existing request according to a selected bibliographic record:

1. Place the desired request in **ILL Review** status (see ***Updating ILL Requests*** on page **32** for details).
   - Requests can be moved to **ILL Review** status from **Awaiting Approval**, **Retry**, **Expired**, or **Canceled** status.
2. Access the Full Record Display for the request (see ***Full Record Display*** on page **61** for details).
3. Note the **Request Number** for the request.
4. Access the Full Record Display for the title you wish to use to modify the ILL request (see the ***Search User Guide*** for more information).
5. Select **Modify Existing Request** from the Staff Functions menu.
   - The Modify Existing Request dialog displays.



Modify Existing Request Dialog

6. Enter the previously noted **Request Number** for the ILL request you wish to modify in the **Enter Request ID for the request you want to Modify** text box.
7. If you wish to generate a new **Lender List** based on the active bibliographic record, select the **Generate new Lender List** checkbox.
   - A *checkmark* indicates a new **Lender List** *will be* generated from the active bibliographic record.
   - An *empty checkbox* indicates a new **Lender List** *will not be* generated from the active bibliographic record.
   - Clicking the checkbox repeatedly will toggle it on and off.
8. Click the **Submit** button to save your changes to the ILL request.

   *If you entered a **Request Number** for an ILL request that* is not *in **ILL Review** status, an advisory dialog displays the message "This Request must be in **ILL Review** Status before it can be modified. Go to Status Browse to change the request status and try again." Click the **Close** button to close the dialog.*

   - The message "Request has been Successfully modified" displays briefly at the top of the screen.
     - If you selected the **Generate new Lender List** checkbox, the modified request is placed in **ILL Review Awaiting Lenders** status while the system generates the **Lender List.** Once the **Lender List** has been populated, the request is moved to **ILL Review** status *automatically*.
     - If you did not select the **Generate new Lender List** checkbox, the modified request is placed in **ILL Review** status.

*If you did not select the **Generate new Lender List** checkbox, you will need to manually edit the **Lender List** to add at least one lender when the updated ILL request has been saved (see **Editing the ILL Lender List** on page **63** for details).*

Emailing the Lender

The **Lender's Email** field on the Full Record Display serves as a link to launch the *default* email client for your workstation, allowing you to send the current lender an email related to the request.

*The **Lender's Email** field is not shown for requests with a status of **Awaiting Approval**, **Cancelled**, **Complete**, **ILL Review**, **Passed to Local System**, **Retry** or **Unfilled**.*

To email the lender:

1. Click the **Lender's Email** link on the Full Record Display.
   - The *default* email client for your workstation opens a "new mail" form.
   - The **To** field is pre-filled with the lender's email address.
   - The **Subject** field is pre-filled with the text "RE: ILL Request (*request number*)
   - The "message" field is pre-filled with the ILL Request number, the title of the requested item, and the text "Message about this request."
2. Edit the content of the email as desired, then send the message in accordance with the standard practices for your email client.

Editing the ILL Lender List

Each ILL request *must* contain at least one lender to which the request will be sent. You may add lenders to the **Lender List** created from the Blank Request Form. Requests created from the Full Record Display will have lenders added by staff or the system, depending on whether your library is using the Enhanced Request this Item function. The **Lender List** is shown on the Full Record Display for all active and completed ILL requests, but includes only the libraries that have yet to be tried. Libraries should be entered in the list in *descending order of preference*. Borrowers can add Library Codes to the list, edit Library Codes in the list, or delete Library Codes from the list. *Lenders cannot edit the Lender List*; Default Lenders may edit the Lender List (see ***Processing ILL Requests as a Default Lender*** on page **84** for more information).

*For ILL requests generated from a Full Record Display in the search interface, the ILL **Lender List** is automatically filled with the appropriate information for all libraries registered as potential lenders to your library which hold a copy of the desired title, (and lend the format and have an available copy, assuming those features have been activated).*

To add a library to the Lender List:

1. Use the *left* mouse button to place the cursor in the **Lender List** at the position you wish to add the new library. If the **Lender List** is currently empty, the cursor is placed at the top position in the list.
2. Enter the code assigned by Auto-Graphics for the library you wish to add, the number of days the lender allows a request to remain at the lender, and if desired, optional information such as a location and call number.

   *All information for each library entered in the **Lender List** must be separated by commas; do not include any spaces. The Library Code is* mandatory; *all other information is* optional.

To edit a Library Code in the Lender List:

1. Place the cursor within the Library Code you wish to edit.
2. Using the left- and right-arrows, **<Backspace>** and **<Delete>** keys, make the desired changes to the Library Code, days to respond, and location/call number.

To delete *selected* Library Codes from the Lender List:

1. Using the *left* mouse button, *triple-click* the code of the library you wish to delete. The selected Library Code and associated content is highlighted.
   - To select several contiguous lenders in the **Lender List**, *double-click and hold* the *left* mouse button, then drag through the **Lender List** to select the desired lenders.

2. Click the *right* mouse button on the selected lender(s) to display the **Lender List** edit menu.
3. Use the *left* mouse button to select **Delete** from the menu.

To delete *all Library Codes* from the Lender List:

1. Click the *right* mouse button inside the **Lender List** to display the **Lender List** edit menu.
2. Use the *left* mouse button to select **Select All** from the menu.
3. Click the *right* mouse button on the selected lenders to display the **Lender List** edit menu.
4. Use the *left* mouse button to select **Delete** from the menu.

Special Considerations when Editing the Lender List

For requests generated using the **Request This Item** function from a Full Record Display, the **Lender List** is pre-filled with *all* libraries holding a copy of the associated title that are also registered as *potential* lenders to your library.

- For libraries using the *standard* Request This Item function: If desired, you may add *additional* lenders to the **Lender List**.
  - When adding lenders; include the Library Code, days to respond, call number and System Number for each library to which you wish to submit the request. Separate the Library Code, days to respond and call number with commas; *do not* include spaces.

    The Library Code for at least one lender is mandatory. All other information is optional. When entering a Library Code only, be sure to include a comma following the code.

  - If desired, you can use the **Locate Lender** function to add lenders to the **Lender List** (see ***Locating ILL Lenders*** on page **19** for details).
- **For libraries using the *enhanced* Request This Item function:** Once the ILL request is submitted, the request enters the **Awaiting Lenders** status, and the **Lender List** is populated with potential lenders from *all selected databases*. When **Awaiting Lenders** processing is complete, depending on your currently selected load leveling algorithm and **Maximum Lenders** setting in the System Wide Record, *one or more* lenders initially included in the **Lender List** *may* be removed from the list. It is recommended that you *do not* add lenders to the **Lender List** *before* submitting the request.

*If you anticipate the need to regularly edit the **Lender List** for ILL requests you submit, be sure that the **Automatic Approval** permission has been disabled for your user account. This will ensure that all ILL requests you submit will be placed in **Awaiting Approval** status (after **Awaiting Lenders** processing is completed), allowing you to edit the **Lender List** using the Full Display for the ILL request.*

For requests created from the Blank Request Form, enter *at least* one lender in the **Lender List**; on separate lines include the Library Code, days to respond, call number and System Number for each library to which you wish to submit the request. Separate the Library Code, days to respond, call number and System Number with commas; *do not* include spaces. If desired, you can use the **Locate Lender** function to add lenders to the **Lender List** (see ***Locating ILL Lenders*** on page **19** for details).

- The Library Code for at least one lender is *mandatory*. All other information is *optional*.

  When entering a Library Code only, be sure *to include a comma following the code.*

Viewing ILL Request History

The system generates a history record for each ILL request. The history record lets you view the progress of the ILL request from the time the request was created until the material has been returned to the lender.

To view History notes:

- The **History Information** field on the Full Record Display shows a chronological listing of each step of the ILL process that resulted in a change of status for the request. **History Information** is listed in reverse chronological order (most recent entry first).
- Each entry in the history record includes:
  - The code for the library that initiated the change in status.
  - The user name of the individual who initiated the change.
  - The date and time the change in status was made.
  - 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. These notes are included for purposes such as suggesting changes to an ILL request, or indicating a reason for rejection.

Some of the history notes are taken directly from incoming error reports sent by the ISO trading partner or reports generated by the SHAREit ISO Protocol Manager. Typically, the note begins with "ERROR" and then conveys the reason. Although it is not possible to provide an exhaustive list of the messages, the following illustrate the range of types of messages received from an external ISO partner:

- **ERROR:** Invalid State Transition. ISO Current State: Shipped. The message has not been sent.
  - **Explanation:** SHAREit Sharing and the external ISO partner have different statuses for the current request as each keep separate versions of the request. If you receive this type of message, please contact the Auto-Graphics Help Desk as it indicates that the request in our ILL database is out of sync with the request in our ISO protocol database.
- **ERROR:** Communication error. ISO Current State: Returned. The message has not been sent. Try 'Repeat Last Message' option.
  - **Explanation:** SHAREit could not connect with the external ISO partner. It displays the current status of the request (you have returned the item). If you wish to send the message again, call up the Full Record Display, select Repeat Last Message from the Status Browse and update the request. This will re-send the message to the external ISO partner.
- **Error Report:** Correlation Information. Transaction Id Problem: Unknown Transaction Id.
  - **Explanation:** It is possible that the external ISO partner deleted the request, so it was unable to match the message with a local transaction.

If you need help in understanding the specific text in the History Notes, contact the Auto-Graphics Help Desk.

Viewing Lenders' Notes

To view Lenders' Notes:

- Access the Full Record Display for the desired ILL request.
- The **Lenders' Notes** field shows a read-only listing of notes entered by *all lenders* during the life of the ILL request. **Lenders' Notes** are listed in reverse chronological order (most recent note first).

Entering Borrower's Notes

To enter Borrower's Notes:

- Access the Full Record Display for the desired ILL request.

- Enter notes in the **Borrower's Notes** text box.
- Click the **Submit** button to save your changes.

Viewing and Editing Patron Information

The patron information fields on the Full Record Display let you add information about the patron who requested an interlibrary loan.

To add or update patron information:

- Enter the name of the patron who submitted the ILL request in the **Patron's First Name**, **Patron's middle Name** and **Patron's Last Name** text boxes.
- Enter the patron's library card number in the **Patron's Library Card Number** text box.
- Enter contact information for the patron in the **Patron's Address 1**, **Patron's Address 2** and **Patron's Address 3 (City, State, Zip)** text boxes, as appropriate.
- Enter the patron's contact information (email address, phone number, etc.) in the **Patron's Contact 1** and **Patron's Contact 2** text boxes, as appropriate.
- If appropriate, enter the patron's "major" (such as "Physics" or "English") and "classification" (such as "Undergraduate" or "class of 2011") in the **Patron's Program and Course** and **Patron's Status and Year** text boxes.
- If desired, select the location from which the patron may pick up the requested material from the **Pickup Location Options** drop-down menu.
- If fees are associated with the item being requested, select the patron's preferred payment method from the **Patron's Payment Options** drop-down menu.

Viewing the Response to a Reference Request

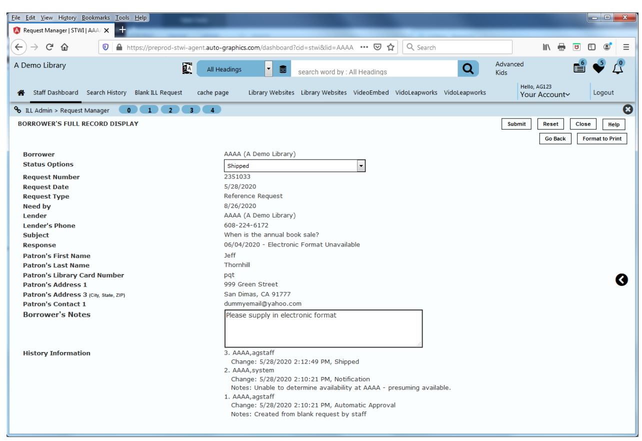
To view the response to a Reference Request:

1. From the Shipped Status Browse List (see ***Chapter 3, Managing Requests*** for details), access the Full Record Display for the reference request.

   *The **Subject** of the reference request is shown in the **Title** column of the Status Browse List.*

   - The subject of the reference request is shown in the **Subject** field of the Full Record Display.

2. If the responding library provided a text message in response to the request, the text message is shown in the **Response** field.
3. If the responding library provided a link to an online resource in response to the request, click the link in the **Document URL** field to view the online resource.



Reference Request Full Display - Borrower

4. If the responding library provided a document attachment in response to the request, click the **Download Attachments** link in the **Document URL** field to download the attachments (see ***Downloading File Attachments*** on page **67** for details).

5. If desired, you can print a copy of the Full Record Display to retain a record of the response (see ***Printing the Reference Request*** on page **67** for details).

6. Once the requested information has been printed and given to the patron, select **Received** from the **Status** menu, then click the **Submit** button.

   - The message "Request number (*number*) has been updated" displays at the top of the screen.

7. Click the **Go Back** button or **Close** button to return to the Shipped Status Browse List.

*Once a reference request has been marked as **Received**, the status of the request is changed to **Complete**.*

Printing the Reference Request

To print a copy of the reference request from the Full Record Display:

1. Click the **Format to Print** button.

   - An *additional* browser window opens, displaying the formatted reference request.

2. Use the standard procedures for your web browser to print the formatted ILL request.

Downloading File Attachments

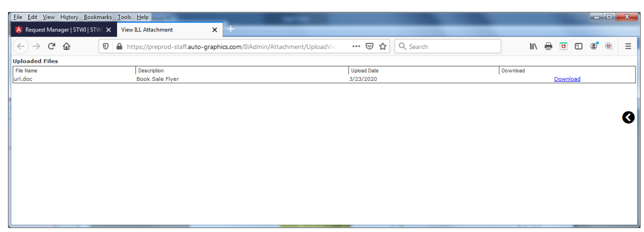
A lending library may choose to fill **Non-returnable (copy)** requests or **Reference Requests** *electronically* by supplying *digital files* to you. If you submitted a **Non-returnable (copy)** request or **Reference Requests**, and the request was filled with one or more digital files, you can download the file(s) supplied.

To download and view file attachments:

You may only access a given file attachment a limited number of times (up to five maximum, as determined by the lending library)..

1. From the Full Record Display for the request, click the **Download Attachments** link for the desired request.

   - The Uploaded Files screen displays. The screen shows a listing of *all* file attachments for the associated ILL request.



Uploaded Files Screen

2. Click the **Download** link for the file attachment you wish to view.

   *Once you have downloaded the file the allowed number of times, the **Electronic Attachment** link is replaced with the message "Viewed," and you can no longer access the file through the ILL Request Summary screen.*

   - A "Copyright Confirmation" message displays. You must acknowledge (accept) the Copyright Statement before downloading the file.

3. Click the **OK** button on the "Copyright Confirmation" message to accept the Copyright Statement and continue with the download. (Click the **Cancel** button on the "Copyright Confirmation" message to cancel the download.)

   - A standard File Download dialog displays.

4. Navigate to the location in which you wish to save the file.

5. If desired, edit the **File name** for the file. *Be sure* to retain the existing file type extension (such as .pdf or .doc), or you *may not* be able to open the file after downloading.
6. Click the **Save** button to download the file.
   - The File Download dialog closes *automatically*, and the file attachment is saved to the specified location.
7. Repeat steps **2** through **6** to download *additional* file attachments.
8. When all file attachments have been downloaded, close the Uploaded Files screen to return to the Items from Other Libraries screen.
9. View the file using an application capable of opening the file type (such as Adobe Acrobat Reader for .pdf files, or Microsoft Word for .doc and .docx files).

Handling Unfilled/Cancelled Requests

The Full Record Display for requests with a status of **Unfilled** or **Cancelled** includes a **For Patron: Why Request was not Filled** field. Text entered in this field is viewable by the patron through the **ILL Request Tracking** feature. Text is displayed to the patron in the **Status** field under the heading **Note**. This field is intended to allow library staff to inform the patron of the reason(s) the request was not filled.

Copyright Compliance Tracking

Copyright compliance functionality is applicable to U.S. libraries only. *Copyright compliance is a function of the borrowing library. All Non-returnable (copy) borrowing requests must include an indication of compliance with the copyright law (CCL) or the CONTU Guidelines (CCG) when requests are sent to potential lenders. Borrowing requests for loans/returnables must not have any copyright compliance indication. This feature cannot be deactivated as it is a legal requirement to include a statement of copyright on all Non-returnable (copy) requests.*

ILL Administration tracks Non-returnable (copy) requests covered by the CONTU Guidelines. Additionally, reports are available to view the titles with filled requests that fall under the CONTU Guidelines (see the ***RESEARCHit/SHAREit Statistics User Guide*** or ***VERSO Statistics User Guide*** for more information).

Section 108(g)(2) of the U.S. copyright law permits libraries to order articles via interlibrary loan “in such aggregate quantities” as long as they do not use ILL to substitute for a subscription to or purchase of the journal title. The National Commission on New Technological Uses of Copyrighted Works (CONTU) developed guidelines to quantify the phrase “in such aggregate quantities.” The Guidelines for the Provision of Subsection108(g)(2) are more commonly referred to as the CONTU Guidelines.

The CONTU Guidelines permit libraries to request and receive periodical (journal or serials) articles and excerpts from other collected works published within the past five years without paying a copyright royalty fee. The CONTU Guidelines *do not* apply to requests for copies of excerpts from monographs or other non-serial publications.

Each library that initiates Non-returnable (copy) requests is required to track copyright compliance for the requests it submits. However, if a single library in a system is responsible for creating requests for patrons affiliated with *any library* in the system, only the library that generates the request(s) is required to track copyright compliance. Copyright compliance *does not* apply to individual patrons placing Non-returnable (copy) requests, but to the library that generated the requests.

Within a calendar year (January 1st – December 31st), a library may order and receive up to *five* articles from a journal title without paying a copyright royalty fee. The articles must have been published within five years of the date of the request to be considered to fall under the CONTU “Guideline of Five.” Articles with publication dates older than five years from the date of the request are considered to fall under other provisions of the copyright law (indicated by **ccl** on the ILL request). Libraries may order and receive *more than five* copies of articles published within five years of the date of request; however, they may be liable for copyright royalty payment for the sixth and subsequent articles. They may also choose to purchase the article from a commercial document supplier, ask a library to loan the issue, or order the article from a library and report the transaction to the Copyright Clearance Center. The CONTU Guidelines are not strict rules or absolute limits; they are guidelines.

Lenders are not required to, nor should they, maintain any copyright records for Non-returnable (copy) requests they fill.

Determining and Tracking Copyright Compliance

Once a **Non-returnable (copy)** request is submitted, the system adds the appropriate copyright compliance (**ccg** or **ccl)** to the **Copyright** field based on the date included in the **Article Information** section of the request. Requests for copies from a monograph will have the copyright compliance of **ccl.**

The system tracks *only* those requests with a **ccg** indication (requests with the **ccl** indication *are not* included in the copyright compliance reports). To determine the CONTU status for each title, the system counts requests that have been submitted but *not yet filled (i.e.,* **Pending, Will Supply, Retry,** etc.) and requests that *have been filled as Non-returnable (copy) requests (i.e.,* **Received)** to determine whether a library has reached or exceeded the "Guideline of Five." If the lender changes the **Request Type** from **Non-returnable (copy)** to **Returnable (loan)** and the item is received, it is considered "not filled" for the copyright compliance report.

*Requests that have not been filled (i.e., **Unfilled)** are not included in the count.*

For requests in **Awaiting Approval** status, staff can change the **Copyright Compliance** value, if necessary, and edit other fields of the request. For example, staff may choose to change **ccg** to **ccl** if the library has entered a subscription to the title but hasn't received the requested issue in which the article appears or will order the title from a commercial document delivery supplier.

If staff approves requests from a Status Browse list screen using the **Apply This Status to All Titles on This Page** menu, a warning message displays if *one or more* requests exceed the CONTU Guidelines. Staff must access the Full Record Display for such requests and update the requests on a case-by-case basis.

For libraries that have enabled "unmediated" patron ILL or have given **Automatic Approval** and **Approve a Request** permissions to selected patrons, **Non-returnable (copy)** requests generated by those individuals are sent directly to the lender, and thus the copyright compliance value cannot be changed. If a patron with **Automatic Approval** and **Approve a Request** permissions submits *one or more* requests that exceed the CONTU Guidelines, the request(s) will be placed in **Awaiting Approval** for staff review.

Receiving a Non-returnable (copy) Copy

When staff update a **Non-returnable (copy)** request to received, if the request has a copyright compliance value of **ccg,** the system will record the date received in the Date Filled column on the CONTU Copyright Tracking report for the title. If the request has a copyright compliance value of **ccl**, no tracking is needed and no report is updated. The request moves to the **Complete** status and normal ILL statistics will be collected.

If the lender changes the Request Type from **Non-returnable (copy)** to **Returnable (loan)** and the copyright compliance value is **ccg**, the request is not counted in the CONTU Guidelines. The CONTU Copyright Tracking Report records the date the loaned material was received in the **Date not Filled** column.

Accessing the Copyright Clearance Center

The Copyright Clearance Center (CCC) is not-for-profit company that provides copyright licensing services to users of copyrighted materials. The CCC collects royalty payments from users of copyrighted materials (libraries, businesses, academic institutions, etc.) and distributes those payments to the copyright owners (publishers, authors, etc.). Libraries may select to pay for articles in excess of the CONTU Guidelines to the CCC.

The **Shipped, Not Received** and **Received** Status Browse screens includes a link to the Copyright Clearance Center for all Nonreturnable (copy) requests. Before updating the request to **Received**, staff may opt to check the CONTU Copyright Tracking Report (see the ***RESEARCHit/SHAREit Statistics User Guide*** or ***VERSO Statistics User Guide*** for more information) for the title to determine if the article is one for which they wish to pay a royalty (i.e., one in excess of the "Guideline of Five").

To access the Copyright Clearance Center, click the logo to open the Copyright Clearance Center in an *additional* browser window. Depending on the level of detail in the request (inclusion of an ISSN, complete title, etc.), CCC will present either a screen with the specific title or a list of titles that may match. Select the appropriate title, view permission options, and report usage to CCC.

A login to the CCC is required to submit payment, but not to search for titles and check royalty fees.

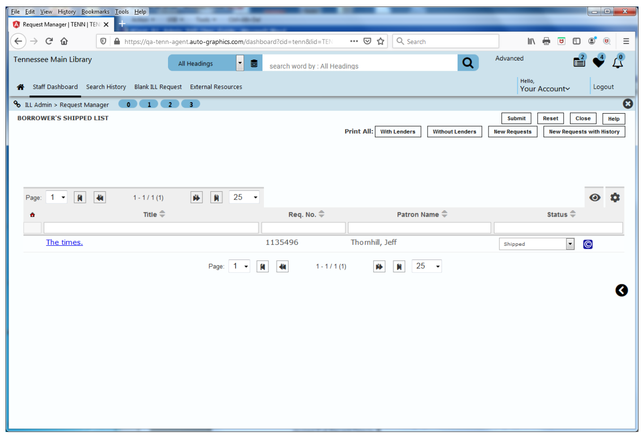
Clicking on the link to CCC will not update the CONTU Copyright Tracking Reports. If you opt to pay a royalty on an article, you may wish to record that fact in the downloaded copy of the Detailed Report.

To access the CCC from a Status Browse List:

1. Access the desired Status Browse list (see ***Using the Request Manager*** on page **29** for details) by clicking the appropriate link in the **Borrower Requests (Status Browse) – Action Items** field or in the **Borrower Requests (Status Browse) – Items awaiting trading partner response** field.

    - A browse list of all in-process ILL requests in the selected status category displays. The list is arranged alphabetically by title, and includes current status information.

    - A icon is displayed in the **Status** column of the Status Browse list for *each* **Non-returnable (copy)** ILL request.



Typical Status Browse List

2. Click the icon for the desired request.

    - The system accesses the Copyright Clearance Center and submits a search to the CCC database using the publication **Title** and **ISBN** or **ISSN** for the requested item.

      *If the **CCC Username** and **CCC Password** for your library's Copyright Clearance Center account have been entered in the Participant Record for your library, the system automatically logs you into your library's account when accessing the Copyright Clearance Center. See **Maintaining Participant Records** on page **99** for more information.*

    - The Copyright Clearance Center Advanced Search results screen displays in an *additional* browser window.

To access the CCC from a Full Record Display:

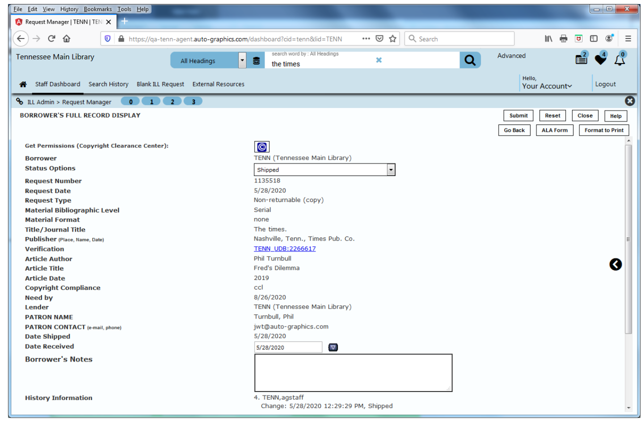
1. Use Status Browse (see ***Using the Request Manager*** on page **29** for details), Title Browse (see ***Browsing By Title*** on page **55**), Patron Browse (see ***Browsing By Patron*** on page **55** for details) or Request Number Search (see ***Searching By Request Number*** on page **56** for details) to access the desired Full Record Display.

    - A icon is displayed in the **Link to Copyright Clearance Center** field at the top of the Full Record Display.

2. Click the icon for the desired request.

   - The system accesses the Copyright Clearance Center and submits a search to the CCC database using the publication **Title** and **ISBN** or **ISSN** for the requested item.

     *If the **CCC Username** and **CCC Password** for your library's Copyright Clearance Center account have been entered in the Participant Record for your library, the system automatically logs you into your library's account when accessing the Copyright Clearance Center. See **Maintaining Participant Records** on page **99** for more information.*



Typical Full Record Display

   - The Copyright Clearance Center Advanced Search results screen displays in an *additional* browser window.

ILL Request Limits

ILL Request Limits is an optional feature that allows authenticated patrons to be assigned to Patron Categories, each of which is designated an "ILL Request Limit." ILL Request Limits may be placed on the number of requests that may be *submitted* during a given time period (per week, per month, per quarter or per year) or on the maximum number of *active* ILL requests allowed for a patron. Separate limits may be specified for *each* Patron Category. Additionally, libraries that allow unauthenticated guests to submit ILL requests can create a "Guest" Patron Category to establish ILL Request Limits for library guests (based on the username and password entered in the ILL Request Form). When an ILL Request Limit is reached, an "over limit" message displays when the user submits an additional ILL request. Patron Categories are created, maintained and assigned to users through the User Administration module (see the ***User Administration User Guide*** for details).

When a new patron category is added through the User Administration module, the No Limit checkbox is selected automatically for the added category. Be sure to edit ILL Request Limits for added categories to set the desired request limits.

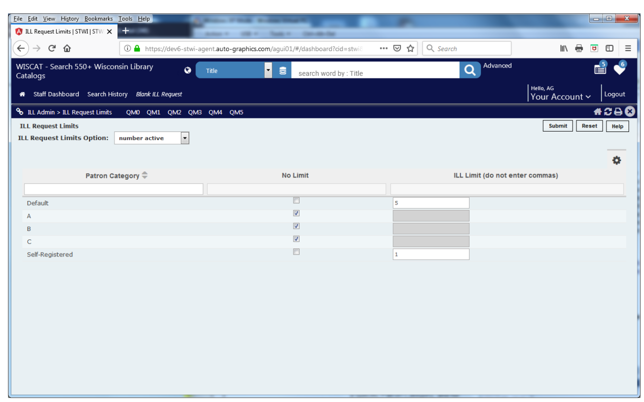
To set ILL Request Limits:

1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **ILL Request Limits**.

   - The ILL Request Limits screen displays.

   - The **Patron Category** field lists *all* Patron Categories currently defined for your library.

   - The **Default** category is used to define ILL Request Limits for authenticated patrons *not assigned* to a specific Patron Category, and for unauthenticated guests when a "Guest" Patron Category has not been defined.



ILL Request Limits Screen

- If desired, you can reconfigure, sort and filter table content (see the ***System Basic User Guide*** for details).

2. Select the period by which you wish to set ILL request limits from the **ILL Request Limits Option** drop-down menu:

   - **number active** – sets the *maximum* number of *active* ILL requests allowed.

     *A borrow request is considered active from the time it is submitted until the time that it is placed in **Returned** status (for filled ILL requests), or has been deleted (for unfilled ILL requests). A copy request is considered active from the time it is submitted until the time that it is received by the borrowing library (for filled requests), or has been deleted (for unfilled requests).*

   - **number per week** – sets the *maximum* number of ILL requests that may be *submitted* during any given week. The count is reset to zero at 12:01 AM each Sunday.

   - **number per month** – sets the *maximum* number of ILL requests that may be *submitted* during any given month. The count is reset to zero at 12:01 AM on the first day of each month.

   - **no limit** – there is no limit placed on the number of ILL requests you can submit.

     *When **no limit** is selected from the **ILL Request Limits Option** drop-down menu, the **No Limit** checkboxes for all patron categories are selected automatically, and the **ILL Limit** text boxes are removed from the screen. If another option is subsequently selected from the **ILL Request Limits Option** drop-down menu, the **ILL Limit** text boxes are returned to the screen in read-only (non-editable) format, and the **No Limit** checkboxes for all patron categories remain selected. You must manually deselect the **No Limit** checkboxes for each patron category for which you wish to specify an ILL request limit (the most recently entered **ILL Limit** for the **User Category** is entered by default).*

3. Enter the *maximum* number of *active* ILL requests allowed for the currently selected period for each **Patron Category** in the associated **ILL Limit** text box.

   - To *disallow* ILL requests for a **Patron Category**, enter "**0**" in the associated **ILL Limit** text box.

   - To configure a **Patron Category** for *unlimited* requests, use the **No Limit** checkbox for the desired **Patron Category**.

     - A checkmark indicates the **Patron Category** *is* configured for *unlimited* requests.

     - An empty checkbox indicates the **Patron Category** *is not* configured for *unlimited* requests.

     - Clicking a checkbox repeatedly will toggle it on and off.

     *When the **No Limit** checkbox for a **Patron Category** is selected, the **ILL Limit** text box for the category is "grayed" out (non-editable). If the **No Limit** checkbox is subsequently de-selected, the **ILL Limit** returns to editable format, and the most recently enter **ILL Limit** for the **Patron Category** is entered by default.*

   - When entering a value greater than "999" in the **ILL Limit** text box, *do not* include a comma in the value entered.

4. When the **ILL Limit** has been set for each **Patron Category**, click the **Submit** button to save your changes.

Chapter 5. LENDER FUNCTIONS

Overview

The **ILL Admin Staff Menu** provides two functions for tracking and processing requests as a lender. In addition to summarizing these five functions, this chapter also describes the fields in the Full Record Display, describes the process Default Lenders use to process requests, and describes broker functions. Lender functions available in the **ILL Admin Staff Menu** include the following:

- **Title Browse** - lets you browse a list of *all* current and completed ILL requests you have received *as a lender*, by the title of the material loaned or supplied. The Full Record Display for any active and completed ILL request you have received can be accessed from the Title Browse screen.

- **Request Number Search** - lets you locate the Full Record Display for a *specific* ILL request you have received using the *system-assigned* Request Number.

Browsing By Title

You can browse a list of all active and completed ILL requests received by your library *as a lender*, using the title of the material requested as the search criteria.

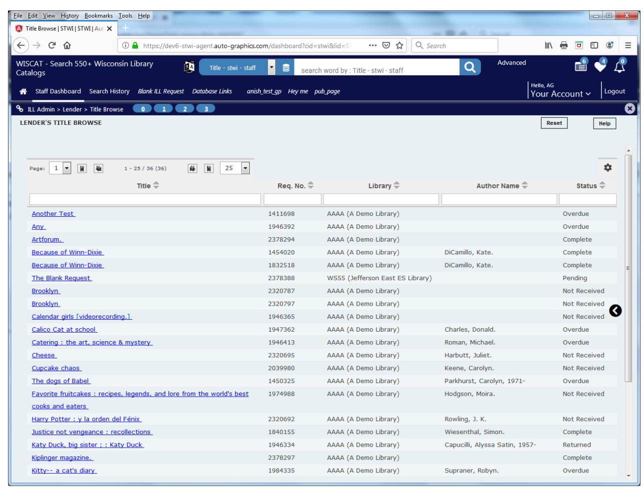
To view the Title List:

1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Lender - Title Browse**.

   - The Lender's Title Browse screen displays.

   - The list is arranged alphabetically by title, and includes current status information. If there are two requests with the same title, they are displayed in Request Number order.

2. If desired, you can reconfigure, sort and filter table content (see the ***System Basics User Guide*** for details).



Lender's Title Browse Screen

3. Use the browse bar tools to browse the list:

   - Use the **Pages** menu to scroll to a selected page of the list.

   - Use the "titles per page" menu to specify the number of titles shown on each page of the list; **25**, **50**, **100** or **250**.

   - If the list is *more than* one page long, use the ⏪ (previous page) and ⏩ (next page) buttons to scroll the list one page at a time. Use the ⏮ (first page) and ⏭ (last page) buttons to scroll to the first or last page of the list, respectively.

To browse ILL requests by title:

1. From the Lender's Title Browse screen, enter the title of the requested item in the **Title** text box.

- When browsing by title, the system reads the title as a string of characters (rather than as separate words), reading each character from left to right.
- You may enter either a partial or complete title as the search criteria.

2. The list updates as you type to display only those titles that match your search term. The first occurrence of the title appears as the first entry in the list.

To view the Full Record Display for an ILL request:

- Click a **Title** link in the list to display the Full Record for that request.
- To return to the Title Browse screen, click the **Go Back** button on the Full Record Display.

Searching By Request Number

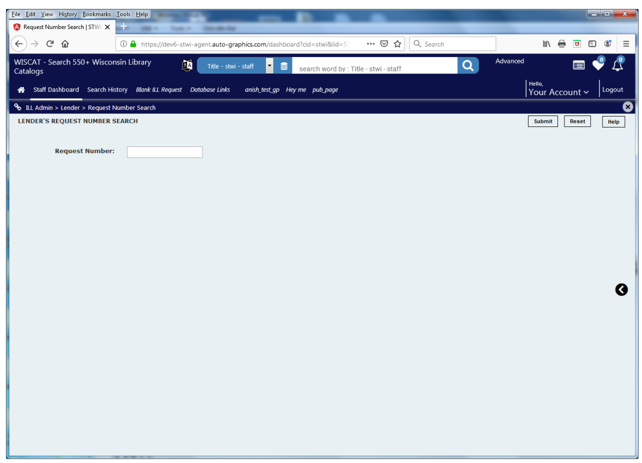
The system automatically assigns a Request Number to each ILL request generated by all *borrowers* in the consortium. Depending on the activity in the consortium, a borrower's requests may not have sequential numbers. Once the ILL request has been created, the Request Number is shown on the Full Record Display for that request. You can use the Request Number to locate the Full Record Display for any ILL request received by your library *as a lender*.

*Customer SuperUsers can perform a "global" Request Number search across all libraries in a consortium or collective. See **Global Request Search** on page **176** for details.*

To perform a Request Number search:

1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Lender - Request Number Search**.
   - The Lender Request Number Search screen displays.
2. Enter the Request Number assigned by the system in the **Request Number** text box. (To clear the contents of the **Request Number** text box, click the **Reset** button.)

   *You must enter a complete **Request Number**.*



Lender's Request Number Search Screen

3. Click the **Submit** button.
   - If the Request Number search is *successful*:
     - The Full Record for the request displays.
   - If the Request Number search is *unsuccessful*:
     - The message "Request Number not found" displays. Click **Go Back** to return to the Request Number Search screen.
     - Re-enter the **Request Number**, then click the **Submit** button.

       If you enter a Request Number for a request you have submitted as a borrower, the system returns the message "Request not found."

Full Record Display

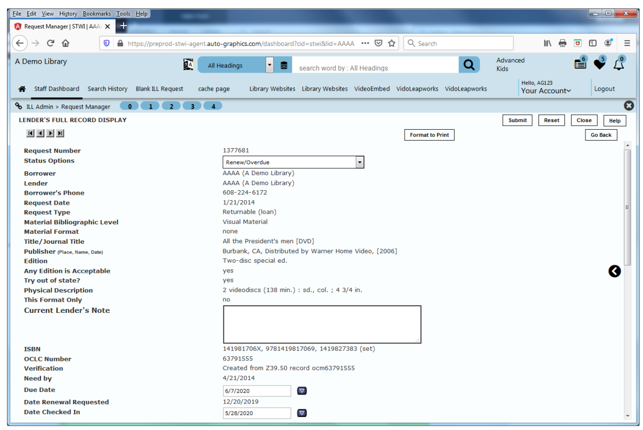
The Lender's Full Record Display provides a *complete* summary of the ILL request you have received *as a lender*. The Full Record Display provides complete bibliographic information for the material requested, including control (accession) number if the request was generated from an Auto-Graphics union catalog; the origination, need by, and deadline dates; and provides access to the borrower's address information, borrower's notes, and the ILL request history. The Full Record Display is *primarily read-only*. You *cannot* make changes to any part of the Full Record Display (with the exception of the **Lender Return Address** and **History Notes**).

*If your library has enabled the optional "Modify Existing Request" functionality, Library SuperUsers or Customer SuperUsers can modify existing ILL requests with a current status of **Pending** (see **Modifying an Existing Request** on page **78** for details).*

The Full Record Display for any ILL request may be accessed using **Status Browse** (see ***Using the Request Manager*** on page **29** for details), **Title Browse** (see ***Browsing By Title*** on page **73** for details), or **Request Number Search** (see ***Searching By Request Number*** on page **73** for details).

The Full Record Display may include both mandatory (system default) and optional fields. The content and arrangement of the Full Record display is determined by your ILL System Administrator. Some fields may not be included in the Full Record Display for your library or consortium. Additionally, the Full Record may contain "customer specified" fields specific to your library or consortium.

To view and edit the Full Record Display:



Lender's Full Record Display

*Depending on the type of request and current **Status**, some fields may not be displayed or editable.*

- The Library Code (followed by the library's name) for the borrowing library is shown in the **Borrower** field. The email address and telephone number for the borrowing library are shown in the **Borrower's Email** and **Borrower's Phone** fields.
  - The **Borrower's Email** field serves as a link to launch the *default* email client for your workstation to allow you to send an email to the borrower for the request (see ***Emailing the Borrower*** on page **79** for details).

  *The **Borrower's Email** field is not shown for requests with a status of **Awaiting Approval**, **Cancelled**, **Complete**, **ILL Review**, **Passed to Local System**, **Retry** or **Unfilled**.*

- The current status of the request is shown in the **Status Options** field.
  - Depending on the current status of the request, the **Status Options** field *may* provide a drop-down menu allowing you to advance the status of the request (see ***Lender's ILL Status Definitions*** on page **41** for details), or to update *borrower's* status for the request (see ***Updating Borrower's Status*** on page **50** for details).
- The **Reason/Condition Options** menu lets you include a reason or condition along with the status change for requests with a current status of **Pending**, **Will Supply/In Process** or **Pending Cancel**.
- The *unique* system-assigned control number for the ILL request is shown in the **Request Number** field.
- The name of your library, and your library's contact information, is shown in the **Lender**, **Lender's Email**, **Lender's Fax** and **Lender's Phone** fields.

  *The **Lender's Email** field is not shown for requests with a status of **Awaiting Approval**, **Cancelled**, **Complete**, **ILL Review**, **Passed to Local System**, **Retry** or **Unfilled**.*

- Material type and format for the requested material are shown in the **Material Bibliographic Level Options** and **Material Format Options** fields.
- Bibliographic information for the requested material is shown in the **Title/Journal Title**, **Uniform Title**, **Author/Creator**, **Publisher (Place, Name, Date**), **Publisher Number**, **Publisher Source**, **Physical Description**, **ISBN**, **Library of Congress Control Number**, **ISSN**, **Edition**, **Series**, **Volumes Needed**, **OCLC Number**, **Other Standard Identifier**, **Item Barcode** and **Call Number and Location** fields, as appropriate.
- The **Any Edition is Acceptable** field indicates whether or not the request may be filled with an edition *other than* the edition specified.

  *The **Any Edition is Acceptable** field is* informational only. *It does not affect the lender build process, or aid in determining whether or not a request should be forwarded to a specific lender.*

- The **This Format Only** field indicates whether or not the request may be filled with an item of a format *other than* the format specified.
- For **Non-returnable (copy)** requests *only*: Article information is shown in the **Article Title**, **Article Author**, **Article Information (Volume, Issue, Pages)** and **Article Date** fields. The copyright compliance is shown in the **Copyright Compliance** field once the request has been submitted to the lender.
- If fees or other charges are associated with the request, you may enter the appropriate amount in the **Charges** field.
- The **Document URL** field is intended primarily for fulfilling requests by providing access to the requested material in electronic format.
  - For requests with a status of **Pending**, or **Will Supply/In Process**, the **Document URL** field provides a text box into which a Uniform Resource Locator providing access to the requested item in electronic format may be entered.

    *You must include **http://** in the **Document URL** to ensure proper operation of the link.*

  - For requests with a status *other than* **Pending**, or **Will Supply/In Process**, the **Document URL** field is *read only*, and shows the currently entered Uniform Resource Locator, if any. The **Document URL** serves as a link to the associated electronic resource. When the link is selected, the associated electronic resource displays in an *additional* browser window.
- The **Verification** field shows the appropriate reference number for verification of the title, and includes the name of the database from which the record was taken (this field shows the accession number assigned by Auto-Graphics for the title the request was created from a record in the union catalog).
  - If desired, you may click the **Verification** link to view and/or print the bibliographic record from your library's union catalog (in *MARC format*) for the requested material.
- The **Request Type** field indicates whether the request is to borrow (**Returnable (loan)**) or photocopy (**Non-returnable (copy)**) the requested material, or if the request is an "informational" request (**Reference Request**) (see ***Responding to a Reference Request*** on page **83** for more information).
- Date-related information for the ILL request is shown in the **Request Date**, **Need By**, **Respond By Date**, **Show Date**, **Due Date**, **Date Shipped**, **Date Received**, **Date Renewal Requested**, **Date Returned** and **Date Checked In** fields.
  - The **Request Date** field shows the date and time at which the patron or borrower created the ILL request.
  - The **Need By** text box shows the calendar date by which the borrower library requires the requested material.
  - The **Respond By Date** field shows the current "deadline date" by which you must respond to the request before it is forwarded to the next lender.
  - The **Show Date** shows the calendar date on which the requested item is intended for exhibition or display.
  - The label and date shown for **Due Date** fields varies, based on the current status of the request (see ***Working with Due Dates*** on page **50** for more information).

  - The **Date Shipped** field shows the date on which the requested item was shipped (the date on which the change to **Shipped** status occurred).
  - The **Date Received** field shows the date on which the requested item was received by the borrowing library (the date on which the change to **Received** status occurred) (see ***Using Specific Due Dates in Updating ILL Requests*** on page **51** for more information).
  - The **Date Renewal Requested** field shows the date on which the borrowing library requested a renewal.
  - The **Date Returned** text box shows the date on which the item was returned by the borrowing library (the date on which the change to **Returned** status occurred) (see ***Using Specific Due Dates in Updating ILL Requests*** on page **51** for more information).
  - The **Date Checked In** field shows the date on which the requested item was checked in by the lending library (the date on which the change to **Checked In** status occurred) (see ***Using Specific Due Dates in Updating ILL Requests*** on page **51** for more information).
- The **Max Cost** text box shows the *maximum* price the patron or borrower is willing to pay for the material requested.
- The **Ship to Name**, **Ship to Address 1**, **Ship to Address 2**, **Ship to Address 3 (City, State, Zip)** and **Ship to Country** fields show the shipping address for the **Borrower**, taken from the borrower's Participant Record.
- Shipping information may be entered in the **Shipped Via Options** and **Shipper's Tracking Number** fields. If multiple items or pages will be supplied when filling the request, the appropriate amount may be entered in the **Number of Pieces/Pages Shipped** field. If the items supplied when filling the request were insured, the appropriate amount may be entered in the **Insured for** field.
- The **Return to Name**, **Return to Address 1**, **Return to Address 2**, **Return to Address 3 (City, State, Zip** and **Return to Country** fields show the return address for your library, taken from your library's Participant Record.
- Notes, special instructions and/or requests from the borrowing library, when included in with the request, are shown in the **Borrower's Notes** and/or **Patron's Notes** fields.

  *The **Patron's Notes** field is available* only *when the **Show Patron Note to Lenders** option in the Participant Record for the borrowing library is set to **Yes*** *(see* **Maintaining Participant Records** *on page **99** for details).*

- Notes, special instruction and/or restrictions on lending the requested item may be specified in the **Current Lender's Note**, **Lenders' Notes** and **Lending Restrictions** fields.
- You may also choose to:
  - View **History Information** (see ***Viewing ILL Request History*** on page **64** for details) and enter or edit the **Return Address** (see ***Viewing and Modifying the Lender Return Address*** on page 81 for details).
  - You may also select to recall loaned items (see ***Recalling Loaned Items*** on page **81** for details) from the Full Record Display, or, in certain cases, override Borrower's status for the request (see ***Updating Borrower's Status*** on page **50** for details).

    Depending on the current status of the request, some fields may be unavailable for modification.

- When all desired information has been entered or edited, click the **Submit** button to submit your changes to the Full Record Display.

To print the Full Record Display:

1. Click the **Format to Print** button.
   - An *additional* browser window opens, displaying the formatted ILL request.

2. Use the standard procedures for your web browser to print the formatted ILL request.
3. Close the formatted ILL request.

To exit the Full Record Display:

Click the **Go Back** or **Close** button to return to the previous browse list.

Modifying an Existing Request

Only Library SuperUsers or Customer SuperUsers can modify an existing ILL request.

In some cases, it may be determined that the bibliographic record associated with an ILL request is not for the correct item. Such requests in the **Pending** status may be placed in **ILL Review** status for review and modification (see ***Lender's ILL Status Definitions*** on page **41** for more information). Individual fields in the request may be manually edited, or the request may be associated with an alternate bibliographic record appropriate for the item being requested.

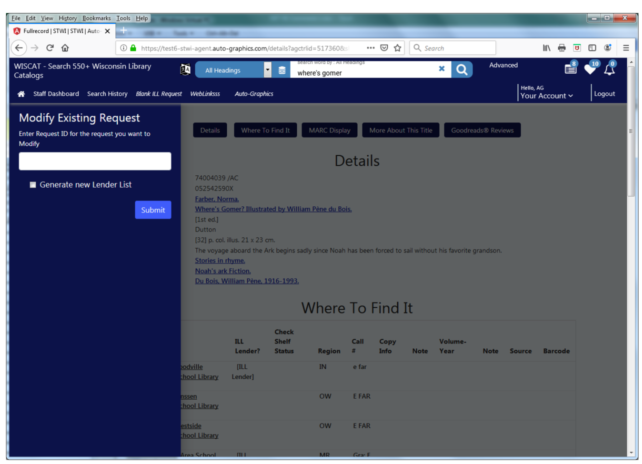
*The **ILL Review** status is available only for systems that have enabled the optional "Modify Existing Request" functionality.*

To manually modify an existing request:

1. Place the desired request in **ILL Review** status (see ***Updating ILL Requests*** on page **32** for details).
   - Requests can be moved to **ILL Review** status from **Pending** status *only*.
2. Access the Full Record Display for the request (see ***Full Record Display*** on page **75** for details).
3. Edit the request as desired.
   - Editing is limited to the following fields: **Request Type**, **Material Bibliographic Level**, **Material Format**, **Title/Journal Title**, **Author/Creator**, **Publisher**, **Publisher Number**, **Publisher Source**, **Series**, **Edition**, **Physical Description**, **ISBN**, **ISSN**, **OCLC Number**, **Other Standard Identifier**, **Source of Item Information**, **Source of Article Citation**, **Article Author**, **Article Title**, **Article Information (Vol, Issue, Pages)**, and **Article Date**.
4. Apply the desired status to the ILL request (see ***Lender's ILL Status Definitions*** on page **41** for more information).

To modify an existing request according to a selected bibliographic record:

1. Place the desired request in **ILL Review** status (see ***Updating ILL Requests*** on page **32** for details).
   - Requests can be moved to **ILL Review** status from lender's **Pending** status *only*.
2. Access the Full Record Display for the request (see ***Full Record Display*** on page **61** for details).
3. Note the **Request Number** for the request.
4. Access the Full Record Display for the title you wish to use to modify the ILL request (see the ***Search User Guide*** for more information).
5. Select **Modify Existing Request** from the Staff Functions menu.
   - The Modify Existing Request dialog displays.



Modify Existing Request Dialog

6. Enter the previously noted **Request Number** for the ILL request you wish to modify in the **Enter Request ID for the request you want to Modify** text box.
7. If you wish to generate a new **Lender List** based on the active bibliographic record, select the **Generate new Lender List** checkbox.
   - A *checkmark* ☑ indicates a new **Lender List** *will be* generated from the active bibliographic record.
   - An *empty checkbox* ☐ indicates a new **Lender List** *will not be* generated from the active bibliographic record.
   - Clicking the checkbox repeatedly will toggle it on and off.
8. Click the **Submit** button to save your changes to the ILL request.

   *If you entered a **Request Number** for an ILL request that* is not *in **ILL Review** status, an advisory dialog displays the message "This Request must be in **ILL Review** Status before it can be modified. Go to Status Browse to change the request status and try again." Click the **Close** button to close the dialog.*

   - The message "Request has been Successfully modified" displays briefly at the top of the screen.
     - If you selected the **Generate new Lender List** checkbox, the modified request is placed in **ILL Review Awaiting Lenders** status while the system generates the **Lender List.** Once the **Lender List** has been populated, the request is moved to **ILL Review** status *automatically*.
     - If you did not select the **Generate new Lender List** checkbox, the modified request is placed in **ILL Review** status.

*If you did not select the **Generate new Lender List** checkbox, you will need to manually edit the **Lender List** to add at least one lender when the updated ILL request has been saved (see **Editing the ILL Lender List** on page **63** for details).*

Emailing the Borrower

The **Borrower's Email** field on the Full Record Display serves as a link to launch the *default* email client for your workstation, allowing you to send the borrower an email related to the request.

*The **Borrower's Email** field is not shown for requests with a status of **Awaiting Approval**, **Cancelled**, **Complete**, **ILL Review**, **Passed to Local System**, **Retry** or **Unfilled**.*

To email the borrower:

1. Click the **Borrower's Email** link on the Full Record Display.
   - The *default* email client for you workstation opens a "new mail" form.
   - The **To** field is pre-filled with the borrower's email address.
   - The **Subject** field is pre-filled with the text "RE: ILL Request (*request number*)
   - The "message" field is pre-filled with the ILL Request number, the title of the requested item, and the text "Message about this request."
2. Edit the content of the email as desired, then send the message in accordance with the standard practices for your email client.

Working with Lenders' Notes

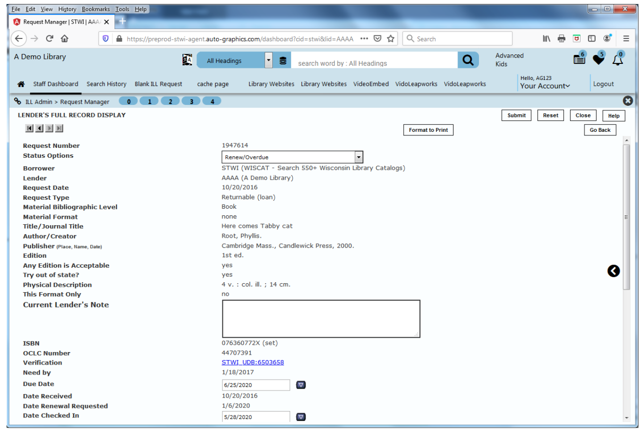
To view Lenders' Notes:

- Access the Full Record Display for the desired ILL request.

- The **Lenders' Notes** field shows a read-only listing of notes entered by *all lenders* during the life of the ILL request. **Lenders' Notes** are listed in reverse chronological order (most recent note first).

To enter Current Lender's Note:

- Access the Full Record Display for the desired ILL request.
- Enter notes in the **Current Lender's Note** text box.
- Click the **Submit** button to save your changes.



Lender's Full Record Display – Current Lender's Note

Viewing ILL Request History

The system generates a history record for each ILL request. The history record lets you view the progress of returnable requests from the time the request was created until the material has been returned to the lender or, for non-returnable requests, until the borrower receives the item.

To view History notes:

- The **History Information** field on the Full Record Display shows a chronological listing of each step in the ILL process that resulted in a change of status for the request. **History Information** is listed in reverse chronological order (most recent entry first).
- Each entry in the history record includes:
  - The code for the library that initiated the change in status.
  - The user name of the individual who initiated the change.
  - The date and time the change in status was made.
  - 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. These notes are included for purposes such as suggesting changes to an ILL request, or indicating a reason for rejection.

Some of the history notes are taken directly from incoming error reports sent by the ISO trading partner or reports generated by the SHAREit ISO Protocol Manager. Typically, the note begins with "ERROR" and then conveys the reason. Although it is not possible to provide an exhaustive list of the messages, the following illustrate the range of types of messages received from an external ISO partner:

- **ERROR:** Invalid State Transition. ISO Current State: Shipped. The message has not been sent.
  - **Explanation:** SHAREit Sharing and the external ISO partner have different statuses for the current request as each keep separate versions of the request. If you receive this type of message, please contact the Auto-Graphics Help Desk as it indicates that the request in our ILL database is out of sync with the request in our ISO protocol database.
- **ERROR:** Communication error. ISO Current State: Returned. The message has not been sent. Try 'Repeat Last Message' option.
  - **Explanation:** SHAREit could not connect with the external ISO partner. It displays the current status of the request (you have returned the item). If you wish to send the message again, call up the Full Record Display, select Repeat Last Message from the Status Browse and update the request. This will re-send the message to the external ISO partner.

- **Error Report:** Correlation Information. Transaction Id Problem: Unknown Transaction Id.
  - **Explanation:** It is possible that the external ISO partner deleted the request, so it was unable to match the message with a local transaction.

If you need help in understanding the specific text in the History Notes, contact the Auto-Graphics Help Desk.

Viewing and Modifying the Lender Return Address

The "return address" fields on the Full Record Display let you specify an alternate address (other than the address contained in your library's Participant Record) to which the loaned material should be returned.

To modify the Return Address:

Enter the return address, as desired, in the **Return to Name**, **Return to Address 1**, **Return to Address 2**, **Return to Address 3 (City, State, Zip)** and **Return to Country** text boxes.

Recalling Loaned Items

You may recall any item on loan with a status of **Accepted Renewal**, **Shipped**, **Received**, **Rejected Renewal** or **Overdue**.

To recall a loaned item:

1. Access the Full Record Display for the item you wish to recall using either the Status Browse, Title Browse or Request Number Search.
2. Select **Recall** from the **Status Options** menu, then click the **Submit** button.
   - Recalling a request sets Borrower's status for the request to **Recalled**.

Responding to Renewal Requests

Borrowers may ask for a renewal on returnable requests. Renewal requests appear in the **Renew Pending** or **Renew/Overdue** status browse. The request appears in the **Renew/Overdue** status if the date due for the item has expired. You may accept or reject the request to keep the loaned item beyond the due date.

Select **Renew Pending** or **Renew/Overdue** from the **Status Options** menu, then click the **Submit** button. The summary list of requests in that status is displayed. If you wish to grant a renewal for a shorter period than the original loan, access the Full Record Display, enter the number of days in the **Due __ Days from Receipt**, change the Status to **Accept Renewal**, and then click the **Submit** button. If you wish to grant a renewal for the same period as the original loan, select **Accept Renewal** from the **Status Options** menu, then click the **Submit** button. If you are not willing to grant a renewal, select **Reject Renewal** from the **Status** menu, then click the **Submit** button.

Attaching Files to an ILL Request

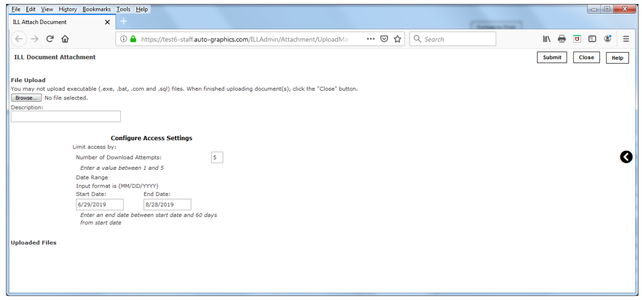
You may choose to fill an ILL request *electronically* by supplying *digital files* or by including a **Document URL** when a copy of the requested item is available *online*. Files are attached to a request or **Document URLs** are entered from the Full Record Display for the request. You may also remove files from a request or delete the **Document URL**, if necessary, prior to "shipping."

*This feature is intended primarily for use in filling **Non-returnable (copy)** and **References Requests**. If you choose to supply digital files for a **Returnable (loan)** request, be sure to select **Shipped (non-returnable)** from the **Status Options** menu when updating the status of the request.*

*You may not upload files larger than 25MB. You may not upload executable (**.exe**, **.bat**, **.com** and **.sql**) files.*

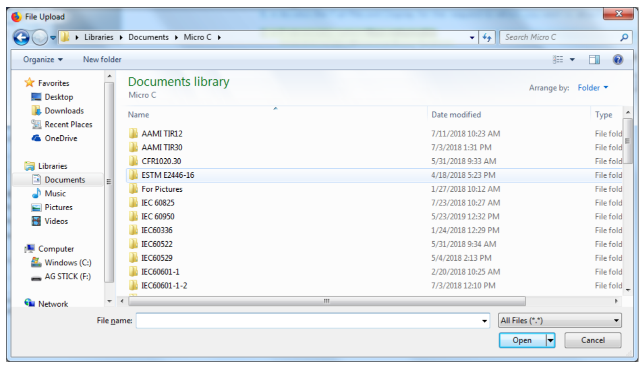
To attach files to a request:

1. Access the Full Record Display for the request to which you wish to attach a file.
2. If necessary, select **Non-returnable (copy)** from the **Request Type Options** menu.
3. Click the **Document URL – Upload Document** link.
   - The ILL Document Attachment screen displays in an *additional* browser tab or window.



ILL Document Attachment Screen

4. Click the **Browse** button to locate the document you wish to attach.
   - A File Upload dialog displays.
5. Locate and select the file you wish to upload, then click the **Open** button.
   - The File Upload dialog closes *automatically*, and the file name is shown next to the **Browse** button.



File Upload Dialog

6. If desired, enter a description of the file in the **Description** text box.
   - The **Description** may be a *maximum* of 500 characters, *including spaces*.
7. Click the **Submit** button.
   - The screen refreshes with the file attachment added to the list of **Uploaded Files**.

   If you attempt to upload a file larger than 25MB, the ILL Document Attachment screen refreshes to display the message "You may not upload files larger than 25MB."

8. Repeat steps **3** through **6** to attach *additional* files to the request.
9. When all desired files have been added to the request, configure the patron's access settings for the uploaded file(s):
   - Enter the *maximum* number of times the patron may attempt to download the file, from **1** to **5**, in the **Number of Download Attempts** text box.
     - The *default* value for Number of Download Attempts is 5.
   - Specify the period of time during which the patron may download the file using the **Date Range – Start Date** and **Date Range – End Date** text boxes.

     *The **Start Date** text box is pre-filled with the current calendar date, and cannot be changed.*

     - The **End Date** can be a *maximum* of 250 days from the **Start Date**.
     - The *default* value for the **End Date** is the calendar date 250 days from the **Start Date**. Enter the desired **End Date** using the format "MM/DD/YYYY."
10. Click the **Close** button to close the ILL Document Attachment screen and return to the Full Record Display.

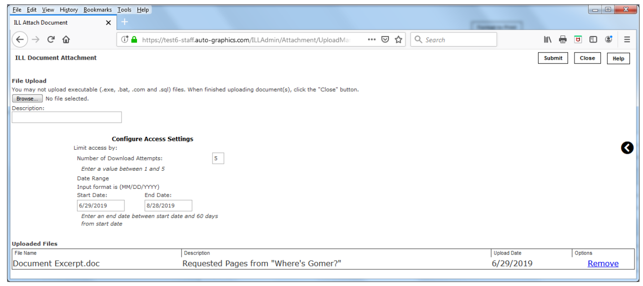
To remove attached files from a request:

1. Access the Full Record Display for the request from which you wish to remove a file.

2. Click the **Document URL – Upload Document** link.

   - The ILL Document Attachment screen displays in an *additional* browser window.

   - The **Uploaded Files** field lists *all* files currently attached to the request.



ILL Document Attachment Screen

3. Click the **Remove** link for the file attachment you wish to remove.

   - The screen refreshes with the selected file removed from the **Uploaded Files** field.

4. Repeat steps **3** to remove *additional* files from the request.

5. When all desired files have been removed from the request, click the **Close** button to close the ILL Document Attachment screen and return to the Full Record Display for the request.

To provide Document URL for an online document:

1. Access the Full Record Display for the request for which you wish to provide a **Document URL**.

2. If necessary, select **Non-returnable (copy)** from the **Request Type Options** menu.

3. Enter the Uniform Resource Locator (URL) for the online document in the **Document URL** text box.

   *Be sure to include **http://** or **https://**, as appropriate.*

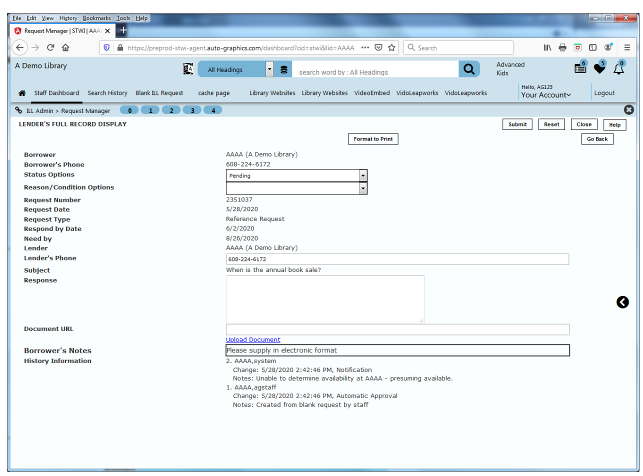
Responding to a Reference Request

To respond to a Reference Request:

1. From the Pending Status Browse List (see ***Chapter 3, Managing Requests*** for details), access the Full Record Display for the reference request.

   *The **Subject** of the reference request is shown in the **Title** column of the Status Browse List.*

   - The subject of the reference request is shown in the **Subject** field of the Full Record Display.



Reference Request Full Display - Lender

2. To respond to the reference request with a text message, enter the desired text in the **Response** field.

3. To respond to the reference request with a link to an online resource, enter the *full URL* to the online resource in the **Document URL** field.

4. To attach a file in response to the reference request, click the **Document URL – Upload Document** link (see ***Attaching Files to an ILL Request*** on page **81** for details).

5. When the appropriate information has been entered, select **Shipped** from the **Status** menu, then click the **Submit** button.

   - The message "Request number (*number*) has been updated" displays at the top of the screen.

6. Click the **Go Back** button or **Close** button to return to the Pending Status Browse List.

Processing ILL Requests as a Default Lender

SHAREit incorporates a feature allowing libraries to specify up to two *default lenders*. Default lenders perform additional searching and verification for requests that have not been verified or located by the borrowing library. Default lenders (such as a library system headquarters or state library) may have additional tools and resources not available to the borrower. Default lenders are able to assume the role of the borrowing library in modifying an ILL request. One or two default lenders may be configured. Use of two default lenders permits the first default lender to send requests to the secondary default lender for even more in-depth verification. ILL requests are forwarded to default lenders *only* after all libraries in the **Lender List** for the request have been exhausted.

When specified, the default lenders (along with **Days to Respond** taken from the associated Participant Record) are appended to the end of the **Lender List** for all ILL requests generated within SHAREit.

Default lenders are afforded additional functionality when processing ILL requests to edit request content, modify the Lender List, override Library Policy and availability checking, etc. The status option **Refer to Next Lender** permits a default lender to forward the request to another lender.

*Default lenders are defined by a consortium's Customer SuperUser. Libraries defined as "default lenders" cannot be included in the System Wide Record, or in the **Preferred Lender List** for any library, nor can they initiate borrowing requests.*

The Full Record Display may include both mandatory (system default) and optional fields. The content and arrangement of the Full Record display is determined by your ILL System Administrator. Some fields may not be included in the Full Record Display for your library or consortium. Additionally, the Full Record may contain up to five "customer specified" fields specific to your library or consortium.

To view and edit the Full Record Display:

*You may modify or update any information contained in a text box on the Full Record Display by selecting and over-typing the desired information. Depending on the type of request and current **Status**, some fields may not be displayed.*

The Library Code (followed by the library's name) for the borrowing library is shown in the **Borrower** field. The telephone number for the borrowing library is shown in the **Borrower's Phone** field.

The current status of the request is shown in the **Status Options** field. **Status Options** provides a drop-down menu allowing you to advance the status of the request, or to update *borrower's* status for the request.

*When a default lender is the only lender for a given request, and the default lender updates the status of the request to **Will Not Supply**, any **Reason/Condition** included in the request is considered the "final answer," and the request is moved to **Unfilled** status (the request will not go to **Retry**).*

- The *unique* system-assigned control number for the ILL request is shown in the **Request Number** field.

- The name of your library, and your library's contact information is shown in the **Lender**, **Lender's Email**, **Lender's Fax** and **Lender's Phone** fields.

  *The **Lender's Email** field is not shown for requests with a status of **Awaiting Approval**, **Cancelled**, **Complete**, **ILL Review**, **Passed to Local System**, **Retry** or **Unfilled**.*

- Material type and format for the requested material are shown in the **Material Bibliographic Level Options** and **Material Format Options** fields.
- Bibliographic information for the requested material is shown in the **Title/Journal Title**, **Uniform Title**, **Author/Creator**, **Publisher (Place, Name, Date)**, **Publisher Number**, **Publisher Source**, **Physical Description**, **ISBN**, **ISSN**, **Edition**, **Series**, **Volumes Needed**, **OCLC Number**, **Other Standard Identifier**, **Item Barcode** and **Call Number and Location** fields, as appropriate.
- The **Any Edition is acceptable** field indicates whether or not the request may be filled with an edition *other than* the edition specified.

  *The **Any Edition is Acceptable** field is* informational only*. It does not affect the lender build process, or aid in determining whether or not a request should be forwarded to a specific lender.*

- The **This Format Only** field indicates whether or not the request may be filled with an item of a format *other than* the format specified.
- For **Non-returnable (copy)** requests *only*: Article information is shown in the **Article Title**, **Article Author**, **Article Information (Volume, Issue, Pages)** and **Article Date** fields. The copyright compliance is shown in the **Copyright Compliance** field once the request has been submitted to the lender.
- If fees or other charges are associated with the request, you may enter the appropriate amount in the **Charges** field.
- The **Document URL** lets you enter a Uniform Resource Locator for the requested item if it is available online in digital format.
- The **Verification** field shows the appropriate reference number for verification of the title, and includes the name of the database from which the record was taken (this field shows the accession number assigned by Auto-Graphics for the title the request was created from a record in the union catalog).
  - If desired, you may click the **Verification** link to view and/or print the bibliographic record from your library's union catalog (in *MARC format*) for the requested material.
- The **Request Type** field indicates whether the request is to borrow (**Returnable (loan)**) or photocopy (**Non-returnable (copy)**) the requested material, or if the request is an "informational" request (**Reference Request**) (see ***Responding to a Reference Request*** on page **83** for more information).
- Date-related information for the ILL request is shown in the **Request Date**, **Need By**, **Show Date** and **Due Date** fields.
  - The **Request Date** field shows the date and time at which the patron or borrower created the ILL request.
  - The **Need By** text box shows the calendar date by which the borrower library requires the requested material.
  - The **Show Date** shows the calendar date on which the requested item is intended for exhibition or display.
  - The label and date shown for **Due Date** fields varies, based on the current status of the request (see ***Working with Due Dates*** on page **50** for more information).
- The **Max Cost** text box shows the *maximum* price the patron or borrower is willing to pay for the material requested.
- The **Lender List** lets you delete *existing* lenders or specify the *additional* lenders to which the request will be submitted (see ***Editing the Lender List*** on page **86** for details).
- You may also choose to:
  - View **History Information** (see ***Viewing ILL Request History*** on page **64** for details) and enter or edit the **Return Address** (see ***Viewing and Modifying the Lender Return Address*** on page **81** for details).

- ○ You may also select to recall loaned items (see ***Recalling Loaned Items*** on page **81** for details) from the Full Record Display, or, in certain cases, override Borrower's status for the request (see ***Updating Borrower's Status*** on page **50** for details).

  Some fields may be unavailable for modification.

- When all desired information has been entered or edited, click the **Submit** button to submit your changes to the Full Record Display.

Editing the Lender List

Each ILL request *must* contain at least one lender to which the request will be sent. The ILL **Lender List** is shown on the Full Record Display for all active and completed ILL requests, but includes only the libraries that have yet to be tried. Libraries should be entered in the list in *descending order of preference*. Default lenders can add Library Codes to the list, edit Library Codes in the list, or delete Library Codes from the list.

To add a library to the Lender List:

1. Use the *left* mouse button to place the cursor in the **Lender List**.
2. Enter the code assigned by Auto-Graphics for the library you wish to add, the number of days the lender allows a request to remain at the lender, and if desired, optional information such as a location and call number.

   *All information entered in the **Lender List** must be separated by commas; do not include spaces. The Library Code is* mandatory*; all other information is* optional*.*

To *override* Lending Policy / Availability Checking:

SHAREit incorporates *optional* features whereby a library's Lending Policies and Item Availability are checked prior to forwarding a request to the lender. If the lender *does not* lend items of the requested material type, or, if the requested item is not *currently* available, the lender is bypassed. If desired, you can *override* these checks, and submit the request to the lender *regardless* of lending policies or availability.

It is recommended that the override function by used only when the associated lender has agreed to accept the request even though it would normally be rejected by the system.

To override Lending Policy / availability checking, enter the code **:ovr** in the **Lender List** for the desired lender *immediately* following the days to respond; e.g., **ABCD,4:ovr**.

Broker Library

A broker library manages the *lending* activity of another library. Typically a broker library is the main library for a branch library or a library not staffed to manage its own lending activity. The library's holdings may be included in a union catalog or accessible via a Z39.50 target.

The borrower identifies an item, creates a request, and includes the owning library's Library Code in the Lender List. If the owning library has a Library Code in the **Broker Code** field of the Participant Record, the request will be redirected to the Broker Library where it will appear in the **Pending** status. The Broker Library manages the lending request in the same way as it manages its own lending requests. The Broker Library may include the address of the owning library in the Return Address field, if desired.

Chapter 6. THE PARTICIPANT RECORD

Overview

The Maintain Participant Record function lets you access, view and update Participant Records. Library staff may update the Participant Record for their *own* library. System Administrators are able to update the Participant Record for *any* library in their consortium.

Each participant institution is assigned a unique Library Code by Auto-Graphics. A library's Participant Record contains all the reference information necessary to ensure the proper handling of interlibrary loan activities, including a participant profile, interlibrary loan (ILL) contact information, Preferred Lender List, general lending/ILL policies, operating hours, detailed ILL policy information, and links to related information.

The Participant Record includes a list of lenders to which ILL requests from the participant are submitted. Each entry in the Lender List shows the code assigned by Auto-Graphics for the lending institution. As a System Administrator, you may add lenders to the list, remove lenders from the list, or edit information for any lender in the list. The Days Requests are Processed field lets you indicate the days of the week when the institution is normally open for business. The Holidays List lets you indicate normal business days on which the institution is closed in observance of a holiday. The system uses this information to calculate need-by dates, due dates, etc. You may also add notes to the Participant Record to indicate any special policies the institution holds with regards to interlibrary loan.

Library staff and patrons may view *abbreviated* Participant Records (in *read-only* form) via the Search module, by:

- Searching the Library Information Database
- Clicking a "Holdings" link on a Full Record Display

Library staff may view the *complete* Participant Record (when logged in under Staff Mode). The information shown to patrons is determined by the Library or System Administrator (see ***Configuring the Patron Display*** on page **128** for details).

Participant Record Data Fields Chart

The Participant Record includes the Library Code, name, location, and shipping address for the library; as well as other necessary data used in the ILL process.

Information contained in the Participant Record is defined below.

Depending on the specific configuration of SHAREit for your library or consortium, some options may not be available.

The Participant Record

Field	Description
Lender Information	
Library Code	Code assigned to the library by Auto-Graphics.
Library Name	The name of the library.
Library Type	The type of library (**Public**, **Academic**, **School**, etc.).
Agency Code	MARC Agency code assigned to the library by the Library of Congress. *(This information is viewable by library staff only.)*
Broker Code	Code designating the broker responsible for fulfilling ILL requests. *(This information is viewable by library staff only.)*

Field	Description
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. *The participant library determines this information*. *(This information is viewable by library staff only.)*
Ref Request Default	Library code designating the default lender to whom Reference Requests are submitted. When a **Ref Request Default** lender is specified, this option overrides the **Reference Lender** configured in the System Wide Record (see ***Viewing and Editing the System Wide Record*** on page **143** for details). *The participant library determines this information*. *(This information is viewable by library staff only.)*
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. *The participant library determines this information*. *(This information is viewable by library staff only.)*
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. *The participant library determines this information*. *(This information is viewable by library staff only.)*
Maximum Pending Queue Size; **Maximum Pending/Will Supply Queue Size**	When the **Load Leveling Algorithm** in the System Wide Record is set to **Current Pending** or **Current Pending/Will Supply**, sets the *maximum* allowable number of requests in the **Pending** status or combined **Pending** and **Will Supply/In Process** statuses, as appropriate. When a new request to the library will result in exceeding the specified value, the library is bypassed and the request is forwarded to the next library in the request **Lender List**. The bypassed library will begin receiving new requests when the request count for the **Pending** status or combined **Pending** and **Will Supply/In Process** statuses, as appropriate, falls below the specified value. *(This information is viewable by library staff only.)*
Days Requests are Processed	Days of the week on which the library processes ILL requests (*not* the days on which the library is open). For example, if a library is open Monday through Friday, but processes ILL requests *only* on Tuesday and Thursday, *only* the **Tuesday** and **Thursday** checkboxes should be selected.
Preferred Lender List	A listing of the Library Codes (assigned by Auto-Graphics) for the libraries designated as preferred ILL lenders. *(This information is viewable by library staff only.)*
System Wide	A listing of the Library Codes (assigned by Auto-Graphics) for the libraries designated by the consortium as potential lenders. *(This information is viewable by library staff only.)*
Network Lenders	A listing of the Library Codes (assigned by Auto-Graphics) for the libraries that are members of the participant's network. This field is applicable only to systems configured for network handling of ILL requests. *(This information is viewable by library staff only.)*
ISSI Participant?	Yes/No button to indicate whether the associated library is an ISSI (Inter-System Sharing Initiative) participant. This field is applicable only to systems configured for ISSI participation. *(This information is viewable by library staff only.)*
InterSystem Priority List	A listing of the Library Codes (assigned by Auto-Graphics) for the libraries that are members of the participant's ISSI network. *This field is applicable only to systems configured for ISSI participation*. *(This information is viewable by library staff only.)*
Blocked Lenders	A listing of the Library Codes (assigned by Auto-Graphics) for the libraries designated as "blocked" (libraries to be blocked from automatic addition by the system to the Lender List for an ILL request, including cases in which "blocked" lenders are included in the System Wide list). *(This information is viewable by library staff only.)*
Primary Default Lender	The Library Code (assigned by Auto-Graphics) for the library designated as the *primary* default lender for the current library. *(This information is viewable by library staff only.)*
Secondary Default Lender	The Library Code (assigned by Auto-Graphics) for the library designated as the *secondary* default lender for the current library. *(This information is viewable by library staff only.)*

Field	Description
Notes	Additional notes related to library information. *(This information is viewable by library staff only.)*
Move Request with Patron Note to Awaiting Approval	Yes/No button to indicate whether requests that include patron notes are *forced* to **Awaiting Approval** status.
Move Request with Vols Needed Note to Awaiting Approval	Yes/No button to indicate whether requests that include Volumes needed are *forced* to **Awaiting Approval** status.
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, Institutional, etc.).
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, etc.).
Show Availability to	Checkboxes to indicate whether **Status** (availability) information will be shown in search results and on Full Record Displays based on User Type (Guests, Patrons, Staff).
Uses Mediated Patron Renewal	Yes/No button to indicate whether the library has enabled *mediated* patron renewal functionality on the patron ILL Request Tracking screen. *(This button is available only if the customer has enabled the optional "Mediated Patron Renewal Requests" feature.)*
Show Item Due Date to Patron	Yes/No button to indicate whether the library has selected to display due dates on the patron ILL Request Tracking screen.
Patron's due date is __ days prior to lender's due date	Specifies the number of days by which the item due date shown to the patron is offset from the date the item is due back to the lender. *(This field is available only if the* ***Show Item Due Date to Patron*** *option has been set to* ***Yes****.)*
Use Holiday List in Calculating Patron's Due Date	Yes/No button to indicate whether library holidays are considered when calculating the patron's due date. *(This field is available only if the* ***Show Item Due Date to Patron*** *option has been set to* ***Yes****.)*
Show Patron Willingness to Pay Message	Yes/No button to indicate whether the library has selected to display the "patron willingness to pay" message on patron ILL Request Forms. *(This button is available only if the library has enabled the optional "Patron Willingness to Pay Message" feature.)*
Patron's Payment Options	Lists all patron payment options for the library. *(This field is available only if the* ***Show Patron Willingness To Pay Message*** *option has been set to* ***Yes****.)*
Blank Request – Disable NCIP Function	Yes/No button to indicate whether NCIP messaging is disabled for ILL requests originated using the Blank Request Form. Note that this function is controlled by the Participant Record of the library updating the request. When a request is created, the **Blank Request – Disable NCIP Function** feature pertains to the borrower, and is controlled by the borrower's Participant Record. When request status is updated, the **Blank Request – Disable NCIP Function** feature pertains to the library that is making the update (borrower *or* lender) and the feature is controlled by the updating library's Participant Record.
Blank Request – Disable Availability	Yes/No button to indicate whether availability checking is disabled for ILL requests originated using the Blank Request Form.
Is this library a default lender?	Yes/No button to indicate whether the library is a default lender. This button is available to a Customer SuperUser only.
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**.

Field	Description
"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**.
Customer Field 6 on Request Form Checked as default	Determines whether the **Customer Field 6** 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	Yes/No button to indicate whether patron data is included on printed shipping labels.
Show Patron Note to Lenders	Yes/No button to indicate whether **Patron's Notes** (when included in an ILL request) are visible to the lender in the **Patron's Notes** field on the Lender's Full Record Display for the request.
Display [ILL Lender] to Patrons/Guests	Yes/No button to indicate whether the **[ILL Lender]** indicator is displayed in **Locations** information for library patrons and guests.
Allow patrons to change need by date	Yes/No button to indicate whether patrons can change the **Need By** date when preparing and submitting ILL requests.
Allow patrons to change pickup location	Yes/No button to indicate whether patrons can change the **Pickup Location** when preparing and submitting ILL requests.
Allow patrons to place requests from lists	Yes/No button to indicate whether creation of ILL requests by patrons from titles saved to a list is allowed (see the ***Search User Guide*** for more information).
Participate in Patron Lookup Tool	Yes/No button to indicate whether the **Library Code** for the participant will be included in the system's implementation of the Patron Lookup Tool. *This field is applicable only to systems utilizing the optional "Patron Lookup Tool" functionality.*
Number of copies default – Multi Copy Form	Specifies the *default* value (**1** to **999**) shown in the **Number of Copies Needed (over 1 creates multiple requests)** text box on the multi-copy ILL Request Form.
Number of copies default – Blank Request Form	Specifies the *default* value (**1** to **999**) shown in the **Number of Copies Needed (over 1 creates multiple requests)** text box on the Blank Request Form.
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.*
Set Minimum Need By Date	Determines the *minimum* allowable **Need By** date for ILL requests. When the **Allow patrons to change need by date** option is enabled, patrons are prevented from entering a **Need By** date that is earlier than the specified minimum date.
Enable checking for duplicate requests	Yes/No button to indicate whether functionality is enabled to check for duplicate requests submitted by the same user.
Time Zone Adjustment (in hours)	Specifies the number of hours difference between the time zone in which your library is located and the Pacific Time Zone.
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" message on patron and staff ILL Request Forms. *(This button is available only if the library has enabled the optional "Owned by This Library Notification" feature.)*
Enable Network Availability Checking	Yes/No button to indicate whether network availability checking for ILL requests is enabled. *This field is applicable only to systems configured for network handling of ILL requests*.
Handling Method if Local System Owns	Determines the handling method in cases where a title requested through interlibrary loan is owned by a network library associated with the library from which the ILL request was placed. *These fields are applicable only to systems configured for network handling of ILL requests*.

Field	Description
Do Not Place Hold	Indicates that the ILL request will not be processed and a hold on the item at the local library will not be placed (the item is available only through normal library checkout). *(This option is available only when the **Enable Network Availability Checking** parameter is set to **Yes**.)*
Configure Message Text	Text of the message shown to the patron in cases where a title requested through interlibrary loan is owned by the library from which the ILL request was placed and the **Handling Method if Local System Owns – Do Not Place Hold** option is selected. *(This option is available only when the **Enable Network Availability Checking** parameter is set to **Yes**.)*
Pass to Catalog	Indicates that the ILL request will not be processed and the patron submitting the request will be directed to the catalog specified by the URL in the associated text box to perform a search for the desired title. *(This option is available only when the **Enable Network Availability Checking** parameter is set to **Yes**.)*
Configure Message Text	Text of the message shown to the patron in cases where a title requested through interlibrary loan is owned by a network library and the **Handling Method if Local System Owns – Pass to Catalog** option is selected. *(This option is available only when the **Enable Network Availability Checking** parameter is set to **Yes**.)*
Pass to Record in Catalog	Indicates that the ILL request will not be processed and the patron submitting the request will be directed to the bibliographic record in the catalog specified by the URL in the associated text box. *(This option is available only when the **Enable Network Availability Checking** parameter is set to **Yes**.)*
Configure Message Text	Text of the message shown to the patron in cases where a title requested through interlibrary loan is owned by a network library and the **Handling Method if Local System Owns – Pass to Record in Catalog** option is selected. *(This option is available only when the **Enable Network Availability Checking** parameter is set to **Yes**.)*
Place Hold Using NCIP	Indicates that a hold for the requested item will be placed through NCIP with the network library owning the title. *(This option is available only when the **Enable Network Availability Checking** parameter is set to **Yes**.)*
Configure Message Text	Text of the message shown to the patron in cases where a title requested through interlibrary loan is owned by a network library and the **Handling Method if Local System Owns – Place Hold Using NCIP** option is selected. *(This option is available only when the **Enable Network Availability Checking** parameter is set to **Yes**.)*
Stop Request if not available	Yes/No button to indicate whether the ILL request will be processed in cases where a title requested through interlibrary loan is owned by a network library is not currently available. *(This option is available only when the **Enable Network Availability Checking** parameter is set to **Yes**.)*
Configure Message Text	Text of the message shown to the patron in cases where a title requested through interlibrary loan is owned by a network library but is not currently available. *(This option is available only when the **Enable Network Availability Checking** parameter is set to **Yes**.)*
ILL Request Form Patron Notices	
Display Disclaimer Notice to Patrons	Yes/No button to indicate whether the Patron Disclaimer Notice will be shown on the ILL Request Form and Blank Request Form accessed through the Search interface.
Text of the Notice	Patron Disclaimer Notice text to be displayed when the **Display Disclaimer Notice to Patrons** option is set to **Yes**. *(This field is available only if the **Display Disclaimer Notice to Patrons** option is set to **Yes**.)*
Display ILL Status Notice	Yes/No button to indicate whether the ILL Status Notice will be shown on the ILL Request Form and Blank Request Form accessed through the Search interface.
Text of the Notice	ILL Status Notice text to be displayed when the **Display ILL Status Notice** option is set to **Yes**. *(This field is available only if the **Display ILL Status Notice** option is set to **Yes**.)*

Field	Description
Address/Contact Information	
Address 1	Street address of the library.
Address 2	Secondary address of the library, if needed. Some libraries include a P.O. Box number in this field.
City	City or town of the library.
State/Province	State or province of the library.
ZIP/Postal Code	ZIP or postal code of the library.
Country	Country of the library (read-only field, this value is supplied by the system)
Ship To Name	Shipping name (*only* if different from the library name).
Ship To Address 1	Ship to street address of the library (*only* if different from the library physical address).
Ship To Address 2	Ship to secondary address of the library, if needed (*only* if different from the library physical address). Some libraries include a P.O. Box number in this field.
Ship To City	Ship to city or town of the library (*only* if different from the library physical address).
Ship To State/Province	Ship to state or province of the library (*only* if different from the library physical address).
Ship To ZIP/Postal Code	Ship to ZIP or postal code of the library (*only* if different from the library physical address).
Ship To Country	Ship to country of the library (read-only field, this value is supplied by the system)
Route Schedule	General information related to pickup/delivery times for common carriers used in shipping or returning materials.
Contact 1	Contact information for the primary ILL contact for the library:
Contact Type	Drop-down menu that allows for selection of the contact type (**ILL Contact**, **Director Contact**, **Technical Contact**, **Billing Contact**, **Other Contact**). It is recommended that **ILL Contact** be selected for **Contact 1**.
ILL Contact Name	Name of the staff member responsible for managing ILL activities for the library.
ILL Contact Title	Title of the staff member responsible for managing ILL activities for the library.
ILL Phone Number: General	Phone number used to reach the library for general matters related to ILL.
ILL Phone Number: Borrowing	Phone number used to reach the library for matters related to *borrowing items from* the library through ILL.
ILL Phone Number: Lending	Phone number used to reach the library for matters related to *lending items to* the library through ILL.
ILL Phone Number: Contact	Phone number used to reach the staff member entered in the **ILL Contact Name** field.
ILL Email Address	Email address used to reach the library for matters related to ILL.
ILL FAX Number	Fax number used to reach the library for matters related to ILL.
Ariel Address	Ariel address used to reach the library for matters related to ILL.
ILL Pickup Locations	Lists all Pickup Locations defined for the library.
Shipping Options	Lists all Shipping Options defined for the library.
Contact 2	Contact information for an additional contact for the library:
Contact Type	Drop-down menu that allows for selection of the contact type (**ILL Contact**, **Director Contact**, **Technical Contact**, **Billing Contact**, **Other Contact**). It is recommended that **ILL Contact** be selected for **Contact 1**.
Contact 2 Name	Name of the staff member.
Contact 2 Title	Title of the staff member.
Contact 2 Phone Number	Phone number used to reach the staff member.

Field	Description
Contact 2 Email Address	Email address used to reach the staff member.
Contact 2 FAX Number	FAX number used to reach the staff member.
Contact 3	Contact information for an additional contact for the library:
Contact Type	Drop-down menu that allows for selection of the contact type (**ILL Contact**, **Director Contact**, **Technical Contact**, **Billing Contact**, **Other Contact**). It is recommended that **ILL Contact** be selected for **Contact 1**.
Contact 3 Name	Name of the staff member.
Contact 3 Title	Title of the staff member.
Contact 3 Phone Number	Phone number used to reach the staff member.
Contact 3 Email Address	Email address used to reach the staff member.
Contact 3 FAX Number	FAX number used to reach the staff member.
Holiday List	
Holiday List	Lists the normal business days on which the library is closed for holidays or vacation.
External Communications (see ***Setting Up External Trading Partners*** on page **121** for more information)	
System type	Shows the system type for the ILL trading partner *outside* your consortium; either **ISO ILL**, **Generic Script messages** or **AGent VERSO CILL**. *(This information is viewable by library staff only.)*
Transport method	Shows the means by which ILL requests are forwarded to the ILL trading partner *outside* your consortium; either **Direct connection (TCP/IP)** or **Email (SMTP)**. *(This information is viewable by library staff only.)*
Computer or Email Address	Address for the computer that will process requests (for **Direct connection** transport method) or email address to which requests will be sent (for **Email** transport method). *(This information is viewable by library staff only.)*
Computer Port No.	Port number for the computer that will process requests. *(This information is viewable by library staff only.)*
ISO System Code	Alphanumeric code or symbol assigned to a library or ILL provider. *(This information is viewable by library staff only.)*
Code Type	The name authority registered with the ILL Application Standards Maintenance Agency responsible for the Library Code or symbol in the ISO System Code. *(This information is viewable by library staff only.)*
Usernames and Passwords	
OCLC Code	Code assigned to the library by OCLC (see ***Setting Up External Trading Partners*** on page **121** for more information). *(This information is viewable by library staff only.)*
OCLC Authorization:	Authorization number assigned by OCLC (see ***Setting Up External Trading Partners*** on page **121** for more information). *(This information is viewable by library staff only.)*
OCLC Password	Password assigned by OCLC (see ***Setting Up External Trading Partners*** on page **121** for more information). *(This information is viewable by library staff only.)*
CCC Username	Copyright Clearance Center account username for your library or consortium, as appropriate (see ***Accessing the Copyright Clearance Center*** on page **69** for more information).
CCC Password	Copyright Clearance Center account password for your library or consortium, as appropriate (see ***Accessing the Copyright Clearance Center*** on page **69** for more information).
FedEx User ID	Federal Express account user ID for your library or consortium, as appropriate.

Field	Description
FedEx Password	Federal Express account user password for your library or consortium, as appropriate.
UPS User ID	United Parcel Service account user ID for your library or consortium, as appropriate.
UPS Password	United Parcel Service account user password for your library or consortium, as appropriate.
CISTI Account	CISTI account number for your library or consortium, as appropriate.
Other Related Information	
Is the Library Open to the Public?	Indicates whether or not the library is open to the public.
Explanation	Identifies any exclusions, conditions or limitations to whether or not the library is open to the public.
Allow Borrow Material in Person	Indicates whether or not the public can borrow material from the library in person.
Explanation	Identifies any exclusions, conditions or limitations to whether or not the public can borrow material from the library in person.
Allow Borrow Material through ILL	Indicates whether or not the public can borrow material from the library through ILL.
Explanation	Identifies any exclusions, conditions or limitations to whether or not the public can borrow material from the library through ILL.
Hours Library Open	Normal business hours for the library.
Exceptions to Library Hours Open	Indicates any exceptions to the normal business hours for the library.
Patron Notification Set-up	
	Information for up to five patron notification messages may be entered.
ILL Status	The request status that triggers transmission of the patron notification message. (*This information is viewable by library staff only.*)
E-Mail Text	The text included in the patron notification message for the associated request status. (*This information is viewable by library staff only.*)
EMail Notice Set-up	
EMail Notice Subject	The subject line text included in each patron notification message. (*This information is viewable by library staff only.*)
EMail Notice From Name	The "From" name included in each patron notification message. (*This information is viewable by library staff only.*)
EMail Notice From Address	The "From" address in each patron notification message. (*This information is viewable by library staff only.*)
CC EMail Address (optional)	The email address to which "courtesy copies" of all patron notification messages are sent. (*This information is viewable by library staff only.*)
Staff Notification Set-Up	
Borrower emails	Configures email notification for ILL requests processed as a borrower:
Email notification address	The e-mail address(es) to which notifications of *new* borrowing requests and/or notifications of ILL request status changes will be sent (e-mail notifications are sent *automatically* by the system). (*This information is viewable by library staff only.*)
NEW request	Indicates whether or not the library will receive e-mail notifications for *new ILL requests* (placed in **Awaiting Approval** status), and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Conditional response	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to **Conditional**, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)

Field	Description
Overdue notice	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to **Overdue**, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Recall request	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to **Recalled**, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Renew rejected response	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to **Rejected Renewal**, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Unfilled notice	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has transitioned to **Unfilled**, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Retry notice	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to **Retry**, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Lost/not returned notice	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to lender's **Lost**, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Shipped notice	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to **Shipped**, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Lender emails	Configures email notification for ILL requests processed as a borrower:
Email notification address	The e-mail address(es) to which notifications of *new* lending requests and/or notifications of ILL request status changes will be sent (e-mail notifications are sent *automatically* by the system). (*This information is viewable by library staff only.*)
NEW lending request	Indicates whether or not the library will receive e-mail notifications for *new ILL requests* (placed in **Pending** status), and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Condition accepted response	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to **Accept Condition** (placed in **Pending** status), and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Renew request	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to **Renewal** (placed in **Renew Pending** status), and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Renew/overdue request	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the due date has expired (item is overdue) and the status has been set to **Renewal** (placed in **Renew/Overdue** status), and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Cancel request	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to **Request Cancel** (placed in **Pending Cancel** status), and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Item not received notice	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has transitioned to borrower's **Not Received** status, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
Overdue item not received notice	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has transitioned to borrower's **Not Received/Overdue** status, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)

Field	Description
Return notice	Indicates whether or not the library will receive e-mail notifications for ILL requests for which the status has been set to **Returned**, and defines the text included in the e-mail notification. (*This information is viewable by library staff only.*)
NCIP C-ILL Communication Parameters	
NOTE: NCIP C-ILL Communication Parameters are available *only* for systems utilizing the optional Circ-ILL functionality. Certain information in this section is supplied automatically by the system and should not be edited or modified locally except under direction of Auto-Graphics.	
NCIP System	Indicates the NCIP system in use. *(This information is viewable by library staff only.)*
NCIP Version	Indicates the NCIP Version supported by the NCIP System in use. (*This information is viewable by library staff only.*)
Communication method	Indicates the Communication Method supported by the NCIP System in use. (*This information is viewable by library staff only.*)
Computer Address	The address (URL) of the computer supporting the NCIP System in use. (*This information is viewable by library staff only.*)
Computer Port No.	The computer port number over which communication takes place. (*This information is viewable by library staff only.*)
NCIP To Agency ID	The NCIP "To Agency" identifier. *(This information is viewable by library staff only.)*
NCIP To Agency Scheme	The address (URL) of the NCIP "To Agency" scheme. (*This information is viewable by library staff only.*)
NCIP From Agency ID	The NCIP "From Agency" identifier. (This information is viewable by library staff only.)
NCIP Application Profile	The address (URL) of the NCIP application profile. (*This information is viewable by library staff only.*)
CheckoutItem Message Includes DesiredDueDate	Indicates whether the NCIP CheckoutItem message includes the DesiredDueDate supplied by the NCIP message or is taken from the **Due Date** in the ILL Request; **Yes** or **No**. (*This information is viewable by library staff only.*)
Display CILL Check In Reminder	Indicates whether the system will display the CILL Check In Reminder message; **Yes** or **No** (*This information is viewable by library staff only.*)
EzProxy Active	Indicates whether EzProxy is active at the participant institution; **Yes** or **No**. (*This information is viewable by library staff only.*)
EzProxy Login URL	The EzProxy login address (UTL). (Applicable only when **EzProxy Active** is set to **Yes**). (*This information is viewable by library staff only.*)
EzProxy key	The EzProxy key. (Applicable only when **EzProxy Active** is set to **Yes**). (*This information is viewable by library staff only.*)
EzProxy Message Text	The EzProxy message text. (Applicable only when **EzProxy Active** is set to **Yes**). (*This information is viewable by library staff only.*)
EzProxy Link Text	The EzProxy link text. (Applicable only when **EzProxy Active** is set to **Yes**). (*This information is viewable by library staff only.*)
EzProxy Logout URL	The EzProxy logout address (URL). (Applicable only when **EzProxy Active** is set to **Yes**). (*This information is viewable by library staff only.*)
SSO	
SAML	Configures Single Sign-On functionality using Security Assertion Markup Language (SAML), as follows:
SAML Active	Indicates whether SAML is active at the participant institution; **Yes** or **No**. (*This information is viewable by library staff only.*)
SAML Service Provider	The name of the SAML Service Provider. (*This information is viewable by library staff only.*)
SAML Identity Provider	The name of the SAML Identity Provider. (*This information is viewable by library staff only.*)

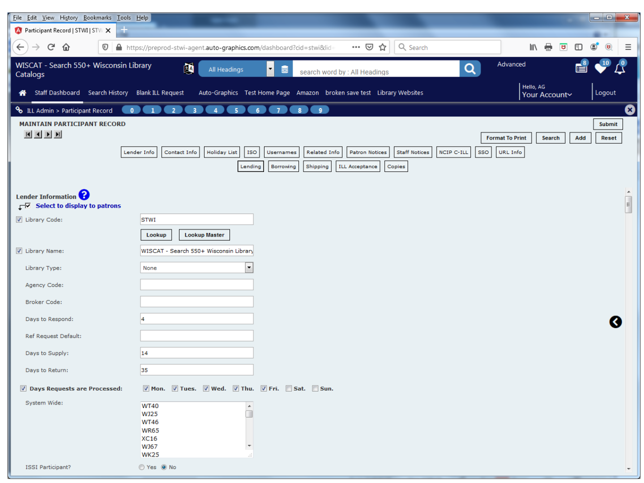
Field	Description
SAML Message Text	The SAML message text. (Applicable only when **SAML Active** is set to **Yes**). (*This information is viewable by library staff only.*)
SAML Link Text	The SAML link text. (Applicable only when **SAML Active** is set to **Yes**). (*This information is viewable by library staff only.*)
URL Information	
Library Catalog(URL)	The URL for the library's Online Public Access Catalog (OPAC).
Library Homepage(URL)	The URL for the library's Home Page.
ILL hours open	The hours during which the library is open for ILL activities.
Directions	Directions for locating the library.
Directions (URL)	The URL for a map and/or "driving directions" page maintained by the library.
Regulations (URL)	The URL for a policies/rules/regulations page maintained by the library.
System Message (URL)	The URL for a general "messages" or "announcements" page maintained by the library.
ILL Message (URL)	The URL for an ILL-specific "messages" or "announcements" page maintained by the library.
ILL Help Page (URL)	The URL for an ILL services "Help" page maintained by the library.
Library Help Page (URL)	The URL for a general library services "Help" page maintained by the library.
Lending	Provides a listing of material types (books, videos, etc.), and identifies the library's ILL lending policy for *each material type* in its collection.
Borrowing	Provides a listing of material types (books, videos, etc.), and identifies whether or not library guests, patrons and staff may submit borrow requests for *each material type*.
Shipping	Provides a listing of shipping methods (US Mail, UPS, etc.), indicates whether or not the library utilizes the associated shipping method, and lists the materials that may be shipped by each method listed.
ILL Acceptance	Provides a listing of ILL request submission methods, and indicates whether or not the library accepts ILL requests submitted using the associated method.
Copies	Provides a listing of copy methods (Photocopy, FAX, etc.), and identifies the fees charged for copy requests supplied by the lender. The currency type is set by your consortium.

Viewing Participant Records

To view participant records:

*When updating a specific area of the Participant Record only, use the **Lender Info**, **Contact Info**, **Holiday List**, **ISO**, **Usernames**, **Related Info, Patron Notices, NCIP C-ILL**, **SSO** and **URL Info** buttons at the top of the screen to scroll to the desired section of the Participant Record.*

1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Maintain Participant Record**.
   - The Maintain Participant Record screen displays.



Maintain Participant Record Screen

2. Enter or edit the code assigned by Auto-Graphics, for the library for which you wish to view the record, in the **Library Code** text box. The **Library Code** text box initially contains the code for the library under which you logged in.
   - If desired, you can use the **Lookup** function to locate the desired Library Code (see ***Using Lookup*** on page **98** for details).
3. Click the **Search** button. (Click the **Reset** button to return the Maintain Participant Record screen to its initial conditions.)
   - If a record *does not exist* for the library, the message “Participant record not found” displays at the top of the screen.
   - If a record *does exist* for the library, the participant information for the library displays.
   - Use the and buttons to browse other participant records. Participant Records are browsed in alphabetic order.
   - Use the and buttons to scroll to the first or last participant record, respectively, by Library Code.

To print a participant record:

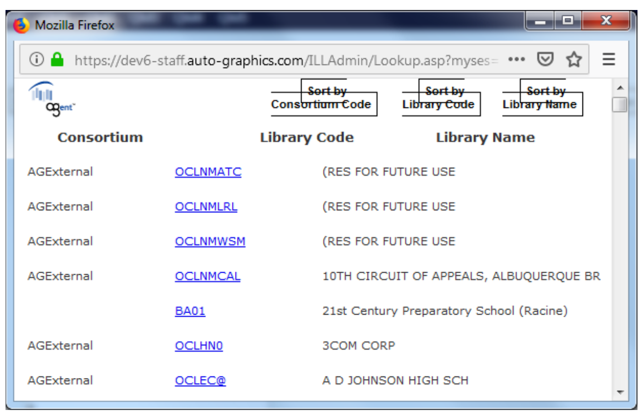
1. Click the **Format to Print** button.
   - An *additional* browser window opens, displaying the formatted Participant Record.
2. Use the standard procedures for your web browser to print the Participant Record.
3. Close the formatted Participant Record.

Using Lookup

If you are not sure of the **Library Code** for a library, you can use the Library Code **Lookup** feature to locate the desired Library Code. Most Library Codes are three or four characters, including letters and numbers, but the Library Code can be as long as 16 characters.

To look up a library:

1. Click the **Lookup** button below the **Library Code** field on the Participant Record.
   - The Library Code Lookup screen displays in an *additional* browser window. This list shows the **Consortium**, **Library Code** and **Library Name** for *all* libraries in your consortium, and any out-of consortium participants.
   - Click the **Sort by Consortium Code** button to sort the list alphabetically by **Consortium** code.



Library Code Lookup Screen

   - Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.
   - Click the **Sort by Library Name** button to sort the list alphabetically by **Library Name**.
2. Click the **Library Code** for the library for which you wish to view the Participant Record.
   - The Library Code Lookup screen closes, and the selected Library Code is entered in the **Library Code** text box *automatically.*

Maintaining Participant Records

ILL Administration provides a *default* Participant Record for *each* library in your consortium. The Maintain Participant Record screen lets you update the default record to provide the *specific* ILL profile information appropriate to each library.

*The **Add** button on the Maintain Participant Record screen is currently inactive. This button is reserved for future implementation.*

Participant records cannot be deleted from your consortium's database. If a library within your consortium becomes inactive (the library no longer participates in interlibrary loan), the following actions should be taken:

*The Library Code for the inactive library should be removed from the System Wide Lender List (see **Viewing and Editing the System Wide Record** on page **143** for details).*

*The Library Code for the inactive library should be removed from the **Preferred Lender List** for all libraries in your consortium (see **Editing Lender Lists** on page **99** for details).*

Updating a Participant Record

Depending on the specific configuration of SHAREit for your library or consortium, some options may not be available.

To update a participant record:

*If desired, use the **Lender Info**, **Contact Info**, **Holiday List**, **ISO**, **Usernames**, **Related Info**, **Patron Notices**, **Staff Notices**, **NCIP C-ILL**,**SSO** and **URL Info** buttons at the top of the screen to scroll to the desired section of the Participant Record.*

*When editing a Participant Record, if you enter more than the maximum number of characters allowed in a given data field, an error dialog displays the message "The information in this field is too long" when you attempt to leave the field. Click the **OK** button on the message dialog, and edit the text as necessary.*

Context-sensitive "Help" buttons ? are displayed next to "section" headings on the Maintain Participant Record screen. Click a "Help" button to display a "popup" dialog with a brief description of the purpose of the section, and a link to detailed information for completing the section.

1. On the Maintain Participant Record screen, enter or edit the code assigned by Auto-Graphics for the library you wish to update in the **Library Code** text box. The **Library Code** text box initially contains the code for the library under which you logged in.
   - If desired, you can use the **Lookup** function to locate the desired Library Code (see ***Using Lookup*** on page **98** for details).
2. Access the record for the participant:
   - Click the **Search** button.
   - If a record *does not exist* for the library, the message "Participant record not found" displays at the top of the screen.
   - If a record *does exist* for the library, the Participant Record for the selected library displays.
3. Enter and/or edit the appropriate participant information (see ***Participant Record Data Fields Chart*** on page **87** for details).

   Context-sensitive "Help" buttons ? are displayed next to "section" headings on the Maintain Participant Record screen. Click a "Help" button to open a "popup" dialog with a brief description of the purpose of the section. Click the link in the "popup" to display detailed information for completing the section.

- Select the appropriate library type for the participant from the **Library Type** menu; **Public**, **Academic**, **School**, **Special**, **Correctional**, **Other**, or **Lookup Only**.

  *If you do not wish to specify a library type for the participant, select **None** from the **Library Type** menu.*

- Enter the MARC Agency code assigned to the library by the Library of Congress in the **Agency Code** text box.

- Enter the code designating the broker responsible for fulfilling ILL requests in the **Broker Code** text box.

- Enter the number of business days within which the library will respond to ILL requests received as a lender in the **Days to Respond** text box.

- Enter the library code for the lender to whom Reference Requests will be submitted in the **Ref Request Default** text box. When a **Ref Request Default** lender is specified, this option overrides the **Reference Lender** configured in the System Wide Record (see ***Viewing and Editing the System Wide Record*** on page **143** for details).

- Enter the number of calendar days it takes the participant library to send requested material to a borrower in the **Days to Supply** text box.

- Enter the number of calendar days (including shipping days) a borrower can keep material before it must be back to the lender in the **Days to Return** text box.

- When the Load Leveling Algorithm in the System Wide Record is set to **Current Pending** or **Current Pending/Will Supply** (see ***Viewing and Editing the System Wide Record*** on page **143** for more information), enter the *maximum* allowable number of requests for the **Pending** status or combined **Pending** and **Will Supply/In Process** statuses in the **Maximum Pending Queue Size** or **Maximum Pending/Will Supply Queue Size** text box, as appropriate.

  - When a new request to the library will result in exceeding the specified value, the library is bypassed and the request is forwarded to the next library in the request **Lender List**. The bypassed library will begin receiving new requests when the request count for the **Pending** status or combined **Pending** and **Will Supply/In Process** statuses, as appropriate, falls below the specified value.

- Use the **Days Requests are Processed** checkboxes to indicate the days of the week on which the library processes ILL requests.

  *Select the days on which the participant processes ILL requests (not the days on which the library is open) in the **Days Requests are Processed** field. For example, if a library is open Monday through Friday, but processes ILL requests only on Tuesday and Thursday, only the **Tuesday** and **Thursday** checkboxes should be selected.*

  ***Days Requests are Processed** and the **Holiday List** are used so non-business days and holidays are not counted as business days when the system calculates due dates, days to respond and deadline dates.*

  - Days are listed in calendar order from Monday (**Mon**) through Sunday (**Sun**).
  - A *checkmark* indicates the ILL department is normally *open* on that day (excluding holidays).
  - An *empty checkbox* indicates the ILL department is normally *closed* on that day.
  - Clicking a checkbox repeatedly will toggle it on and off.

4. Create or edit the **Preferred Lender List** for the participant (see ***Editing Lender Lists*** on page **111** for details).

5. **For systems configured for network handling of ILL requests *only*:** Create or edit the **Network Lenders** list for the participant (see ***Editing Lender Lists*** on page **111** for details).

6. **For systems configured for ISSI (Inter-System Sharing Initiative) participation *only*:** Use the **ISSI Participant?** radio buttons to indicate whether or not the associated library is an ISSI participant.

   - Select the **Yes** radio button if you the associated library *is* an ISSI participant.

   - Select the **No** radio button if you the associated library *is not* an ISSI participant.

7. **For systems configured for ISSI (Inter-System Sharing Initiative) participation *only*:** Create or edit the **InterSystem Priority List** for the participant (see ***Editing Lender Lists*** on page **111** for details).

8. If desired, create or edit the **Blocked Lenders** list for the participant (see ***Editing Lender Lists*** on page **111** for details).

9. If desired, enter the codes assigned by Auto-Graphics for the libraries you wish to designate as the *primary* and *secondary* default lenders for the participant in the **Primary Default Lender** and **Secondary Default Lender** text boxes (see ***Processing ILL Requests as a Default Lender*** on page **84** for more information).

   *Only those libraries identified as default lenders by your consortium's Customer SuperUser can be specified as a **Primary Default Lender** or **Secondary Default Lender**. Libraries identified as default lenders* cannot *be added to the **Preferred Lender List** for* any *library.*

   - The **Primary Default Lender** and **Secondary Default Lender** are appended to the end of the **Lender List** for *all* ILL requests generated through the system.

     *If you enter a code for a library that has not been identified as a default lender, an advisory message listing the default lenders displays when you update the Participant Record, and the invalid codes are not saved. Click the **OK** button to close the message, then re-enter a **Primary Default Lender** and **Secondary Default Lender**, as appropriate, selected from the list of default lenders.*

     *If no default lenders have been identified for your consortium, an advisory message displays when you update the Participant Record. Click the **OK** button to close the message. You cannot add default lenders to the Participant Record at this time.*

   - If you *do not* wish to specify default lenders, leave the **Primary Default Lender** and **Secondary Default Lender** text boxes blank.

10. You may add notes about the participant library in the **Notes** text box.

    - These notes will generally contain information about the participant's ILL policies.

11. Use the **Move Request with Patron Note to Awaiting Approval** radio buttons to indicate whether or not ILL requests that include **Patron Notes** should be forced to the **Awaiting Approval** status.

    - Select the **Yes** radio button if you *do* wish ILL requests that include **Patron Notes** to be *forced* to the **Awaiting Approval** status.

    - Select the **No** radio button if you *do not* wish ILL requests that include **Patron Notes** to be *forced* to the **Awaiting Approval** status.

12. Use the **Move Request with Vols Needed Note to Awaiting Approval** radio buttons to indicate whether or not ILL requests that include **Volumes Needed** information should be forced to the **Awaiting Approval** status.

    - Select the **Yes** radio button if you *do* wish ILL requests that include **Volumes Needed** information to be *forced* to the **Awaiting Approval** status.

    - Select the **No** radio button if you *do not* wish ILL requests that include **Volumes Needed** information to be *forced* to the **Awaiting Approval** status.

13. Use the **Show Blank ILL Form** checkboxes to indicate the User Types for which the **Blank ILL Request** option will be shown on Search and Staff screens, **Staff**, **Patrons**, **Institutional**, **IP Auth**, **IP Auth - Require Login**, **Guests**, and/or **Guests - Require Login**, as applicable.

- A *checkmark* indicates the **Blank ILL Request** option *will be shown* for the associated User Type.
- An *empty checkbox* indicates the **Blank ILL Request** option *will not be shown* for the associated User Type.
- Clicking a checkbox repeatedly will toggle it on and off.

14. Use the **Show Request This Button** checkboxes to indicate the User Types for which the **Request This Item** button will be shown on Full Record Displays in the Search interface, **Staff**, **Patrons**, **Institutional**, **IP Auth**, **IP Auth - Require Login**, **Guests**, and/or **Guests - Require Login**, as applicable.
    - A *checkmark* indicates the **Request This Item** button *will be shown* for the associated User Type.
    - An *empty checkbox* indicates the **Request This Item** button *will not be shown* for the associated User Type.
    - Clicking a checkbox repeatedly will toggle it on and off.
15. Use the **Show Availability to** checkboxes to indicate the User Types for which **Status** (availability) will be shown in search results and on Full Record Displays in the Search interface, **Staff**, **Patrons** and/or **Guests**, as applicable.
    - A *checkmark* indicates **Status** (availability) *will be shown* for the associated User Type.
    - An *empty checkbox* indicates **Status** (availability) *will not be shown* for the associated User Type.
    - Clicking a checkbox repeatedly will toggle it on and off.
16. If your consortium has enabled the *optional* “Mediated Patron Renewal Requests” feature, use the **Uses Mediated Patron Renewal** radio buttons to set your preference for availability of the mediated patron renewal functionality on the patron ILL Request Tracking screen:
    - Select the **Yes** radio button if you *do* wish mediated patron renewal request functionality to be available on the patron ILL Request Tracking screen.
    - Select the **No** radio button if you *do not* wish due mediated patron renewal request functionality to be available on the patron ILL Request Tracking screen.
        - When the mediated patron renewal request function is enabled, the **Status** field on the patron ILL Request Tracking screen for all items on *initial* loan to a patron includes an **Ask For Renewal** button, allowing the patron to request renewal for an item currently on loan.

          The renewal request must be approved by the borrowing library prior to forwarding to the lending library.
17. If your library has granted **Patron Request Tracking** privileges to library patrons, use the **Show Item Due Date to Patron** radio buttons to set your preference for display of due dates on the patron ILL Request Tracking screen or **My Account - Items from Other Libraries** screen and inclusion of due dates on printed bookstraps:
    - Select the **Yes** radio button if you *do* wish due dates to be displayed on the patron ILL Request Tracking screen and included on printed bookstraps.
    - Select the **No** radio button if you *do not* wish due dates to be displayed on the patron ILL Request Tracking screen or included on printed bookstraps.
        - When the **Show Item Due Date to Patron** feature is enabled, due dates for items received through interlibrary loan are shown in the **Status** field of the ILL Request Tracking screen or **My Account - Items from Other Libraries** screen and in the **By this due date** field on printed bookstraps.

- **For *new* requests:** The due date is added to the ILL Request Tracking screen when the status for the item is set to **Shipped** by the lending library. The due date is calculated by adding the number of days specified in the **Due __days from receipt** or the **Days to Return** field on the Participant Record for the *lender* to the calendar date on which the status for the item was set to **Received**.
- **For *renewal* requests:** The *new* due date for the item is added to the ILL Request Tracking screen when the status for the item is set to **Accept Renewal** by the lender. The due date is calculated by adding the number of days for which the *initial* loan was granted to either the calendar date on which the status for the item was set to **Accept Renewal** or to the original due date, depending on the **Calculate Renewed to Date** selection.
- If desired, use the **Patron's due date is __ days prior to lender's due date** text box to *offset* the due date displayed to the patron by the specified number of days. For example, if the lending library's due date is March 10, and a value of "4" is entered, a due date of March 6 will be shown to the patron. This function is generally used to ensure material is returned by the patron with sufficient time remaining to return the material to the lending library by the due date. The *default* value for the **Patron's due date is __ days prior to lender's due date** is "0."
- Use the **Use Holiday List in Calculating Patron's Due Date** radio buttons to indicate whether library holidays should be *included* or *excluded* when determining the patrons due date. Select the **Yes** radio button to *include* holidays (the patron's due date is *extended* by one day for each holiday that occurs during the loan period). Select the **No** radio button to *exclude* holidays (the patron's due date *is not* extended when a holiday occurs during the loan period).

18. If your library has enabled the *optional* "Patron Willingness to Pay Message" feature, use the **Show Patron Willingness To Pay Message** radio buttons to set your preference for display of the "patron willingness to pay" message on the patron ILL Request Forms.

    - Select the **Yes** radio button if you *do* wish the "patron willingness to pay" message to be displayed on patron ILL Request Forms.
    - Select the **No** radio button if you *do not* wish the "patron willingness to pay" message to be displayed on patron ILL Request Forms.

19. If the **Show Patron Willingness To Pay** option is set to **Yes**, the **Patron's Payment Options** field displays when your changes to the Participant Record are submitted. If desired, create a list of **Patron's Payment Options** for the library (see ***Managing Patron's Payment Options*** on page **115** for details).

20. If your library uses NCIP messaging, use the **Blank Request – Disable NCIP Function** radio buttons to indicate whether or not NCIP messaging is disabled for ILL requests originated using the Blank Request Form.

    *This function is controlled by the Participant Record of the library updating the request. When a request is created, the **Blank Request – Disable NCIP Function** feature pertains to the borrower, and is controlled by the borrower's Participant Record. When request status is updated, the **Blank Request – Disable NCIP Function** feature pertains to the library that is making the update (borrower or lender) and the feature is controlled by the updating library's Participant Record.*

    - Select the **Yes** radio button to *disable* NCIP messaging for ILL requests originated using the Blank Request Form.
    - Select the **No** radio button to *enable* NCIP messaging for ILL requests originated using the Blank Request Form.

21. Use the **Blank Request – Disable Availability** radio buttons to indicate whether or not availability checking is disabled for ILL requests originated using the Blank Request Form.

    - Select the **Yes** radio button to *disable* availability checking for ILL requests originated using the Blank Request Form.
    - Select the **No** radio button to *enable* availability checking for ILL requests originated using the Blank Request Form.

22. Use the **Is this library a default lender** radio buttons to indicate whether or not the library is a default lender.

    *The **Is this library a default lender** options are available to Customer SuperUsers* only.

    - Select the **Yes** radio button if the library *is* a default lender.
    - Select the **No** radio button if the library *is not* a default lender.

23. Use the **Display History Information** radio buttons to specify the order in which history information is shown in the **History Information** field on ILL Request Full Record Displays.

    - Select the **Oldest First** radio button to display **History Information** in *chronological* order (oldest entry first).
    - Select the **Newest First** radio button to display **History Information** in *reverse chronological* order (newest entry first).

24. Use the **Calculate Renewed to Date** radio buttons to specify how the system will calculate the "renewed to" date when a renewal request for an item on loan through ILL by your library is accepted.

    - Select the **Add to original due date** radio button to calculate the "renewed to" date from the original due date.
    - Select the **Add to Accept Renewal date** radio button to calculate the "renewed to" date from the date on which the status of the request was updated to **Accept Renewal**.

25. Use the **"Any Edition is Acceptable" Checked as default** radio buttons to configure the *default* value for the **Any Edition is Acceptable** checkbox on the ILL Request Form and Blank Request Form.

    - Select the **Yes** radio button to set the *default* value for the **Any Edition is Acceptable** checkbox to *selected*.
    - Select the **No** radio button to set the *default* value for the **Any Edition is Acceptable** checkbox to *unselected*.

26. Use the **Customer Field 6 on Request Form Checked as default** radio buttons to set the *default* state for the Customer Field 6 checkbox when included on the ILL Request Form or Blank Request Form.

    - Select the **Yes** radio button to set the *default* state of the Customer Field 6 checkbox to *selected*.
    - Select the **No** radio button to set the *default* state of the Customer Field 6 checkbox to *unselected*.

27. Use the **Shipping Label Default** radio buttons to set the *default* selection for the **Include** menu on the Maintain Shipping Labels screen; select **Shipped Status Only** or **Both Shipped and Returned**, as desired.

28. Use the **Hide patron data on shipping labels** radio buttons to indicate whether or not patron data is included on printed shipping labels.

    - Select the **Yes** radio button to *exclude* patron data from printed shipping labels.
    - Select the **No** radio button if to *include* patron data on printed shipping labels.

29. Use the **Show Patron Note to Lenders** radio buttons to indicate whether **Patron's Notes** (when included in an ILL request) are visible to the lender in the lender's Full Record Display for the request.

    - Select the **Yes** radio button to *enable* display of **Patron's Notes** in lender's Full Record Displays.
    - Select the **No** radio button to *disable* display of the **Patron's Notes** in lender's Full Record Displays.

30. Use the **Display [ILL Lender] to Patrons/Guests** radio buttons to indicate whether or not the **[ILL Lender]** indicator is displayed in **Locations** information for library patrons and guests.

    - Select the **Yes** radio button to *enable* display of the **[ILL Lender]** indicator.

- Select the **No** radio button to *disable* display of the **[ILL Lender]** indicator.

31. Use the **Allow patrons to change need by date** radio buttons to indicate whether or not patrons can change the *default* **Need By** date when preparing and submitting ILL requests.

    - Select the **Yes** radio button to *allow* patrons to change the *default* **Need By** date.
    - Select the **No** radio button to *prohibit* patrons from changing the *default* **Need By** date.

32. Use the **Allow patrons to change pickup location** radio buttons to indicate whether or not patrons can change the *default* **Pickup Location** date when submitting ILL requests.

    - Select the **Yes** radio button to *allow* patrons to change the *default* **Pickup Location**.
    - Select the **No** radio button to *prohibit* patrons from changing the *default* **Pickup Location**.

33. Use the **Allow patrons to place requests from lists** radio buttons to indicate whether or not patrons can perform creation of ILL requests from titles saved to a list.

    - Select the **Yes** radio button to *allow* patrons to perform creation of ILL requests from titles save to a list.
    - Select the **No** radio button to *prohibit* patrons from performing creation of ILL requests from titles saved to a list.

    *When the **Allow patrons to place requests from lists** option is* enabled*, a "request" option is provided on all lists created by patrons.*

34. Use the **Participate in Patron Lookup Tool** radio buttons to indicate whether or the participant will be included in the system's implementation of the Patron Lookup Tool.

    - Select the **Yes** radio button if the participant *will* be included in the system's implementation of the Patron Lookup Tool.
    - Select the **No** radio button if the participant *will not* be included in the system's implementation of the Patron Lookup Tool.

    This field is applicable only to systems utilizing the optional "Patron Lookup Tool" functionality.

35. Use the **Number of copies default – Multi Copy Form** text box to specify the *default* value shown in the **Number of Copies Needed (over 1 creates multiple requests)** text box on the multi-copy ILL Request Form.

    - Enter the desired number of copies in the **Number of copies default – Multi Copy Form** text box.

    *You may enter a value from **1** to **999** copies in the __ **Number of copies default – Multi Copy Form** text box. If you do not wish to specify a default value, leave the **Number of copies default – Multi Copy Form** text box blank.*

36. Use the **Number of copies default – Blank Request Form** text box to specify the *default* value shown in the **Number of Copies Needed (over 1 creates multiple requests)** text box on the multi-copy ILL Request Form.

    - Enter the desired number of copies in the **Number of copies default – Blank Request Form** text box.

    *You may enter a value from **1** to **999** copies in the __ **Number of copies default – Blank Request Form** text box. If you do not wish to specify a default value, leave the **Number of copies default – Blank Request Form** text box blank.*

37. Use the **Set Default Need-by Date** text box to specify the number of days added to the calendar date on which an ILL request is prepared and submitted to determine the *default* "Need By" date for the request.

    - Enter the desired number of days in the **__ Days from Date of Request** text box.

*You may enter a value from **1** to **365** days in the **__ Days from Date of Request** text box. The default value for the **__ Days from Date of Request** text box is **90**.*

38. Use the **Set Minimum Need-by Date** text box to specify the number of days added to the calendar date on which an ILL request is prepared and submitted to determine the *minimum* "Need By" date for the request.

- Enter the desired number of days in the **__ Days from Date of Request** text box.

*You may enter a value from **1** to **365** days in the **__ Days from Date of Request** text box. The default value for the **__ Days from Date of Request** text box is **0**.*

*When the **Allow patrons to change need by date option** is enabled, patrons are prevented from entering a **Need By** date that is earlier than the specified minimum date.*

39. Use the **Enable checking for duplicate requests** radio buttons to indicate whether or not the system will perform a check for currently active ILL requests for the same title by the patron submitting the request.

- Select the **Yes** radio button to *enable* checking for duplicate requests.
- Select the **No** radio button to *disable* checking for duplicate requests.

*When the **Enable checking for duplicate requests** option is enabled, an advisory message is displayed when a patron submits a duplicate ILL request, and the duplicate request is discarded.*

40. Use the **Time Zone Adjustment (in hours)** text box to specify the number of hours difference between the time zone in which your library is located and the Pacific Time Zone.

41. If your library has enabled the *optional* "Owned by This Library Notification" feature, use the **Show Owned By This Library Notification Message** radio buttons to set your preference for display of the "owned by this library" message on the patron and staff ILL Request Forms.

- Select the **Yes** radio button if you *do* wish the "owned by this library" message to be displayed on the patron and staff ILL Request Forms.
- Select the **No** radio button if you *do not* wish the "owned by this library" message to be displayed on the patron and staff ILL Request Forms.
- When the "owned by this library" message is enabled:
  - When a library patron or staff member selects the **Request This Item** button on the Full Record Display for an item owned by the library under which the user logged in, the ILL Request Form displays the message "The item you're requesting is owned by your library. Please check on its availability before submitting this request." at the top of the ILL Request Form.
  - When a library patron or staff member *with or without* **Automatic Approval** permission submits an ILL request for an item owned by the library under which the user logged in, a 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.

42. If your consortium or collective is configured for network handling of ILL requests, use the **Enable Network Availability Checking** radio buttons to enable or disable network availability checking for ILL requests.

- Select the **Yes** radio button to *enable* network availability checking.
- Select the **No** radio button to *disable* network availability checking.

*When the **Enable Network Availability Checking – Yes** radio button is selected and an ILL request is received for an item owned by the local library or a library within the network, the ILL request is handled in accordance with the selected **Handling Method if Local System Owns** option.*

- When the **Enable Network Availability Checking – Yes** radio button is selected, use the **Handling Method if Local System Owns** options to set the handling method in cases where an ILL request is received for an item owned by the local library or a library within the network as desired:
  - **Do Not Place Hold** – Indicates the ILL request *will not* be processed and a hold for the item *will not* be placed. Enter the message to be displayed to the patron in such cases in the associated **Configure Message Text** text box.
  - **Pass to Catalog** – Indicates the ILL request *will not* be processed and the patron submitting the request will be directed to the catalog specified by the URL in the associated text box to perform a search for the desired title. Enter the message to be displayed to the patron in such cases in the associated **Configure Message Text** text box.
  - **Pass to Record in Catalog** – Indicates the ILL request *will not* be processed and the patron submitting the request will be directed to the bibliographic record in the catalog specified by the URL in the associated text box. Enter the message to be displayed to the patron in such cases in the associated **Configure Message Text** text box.
  - **Place Hold Using NCIP** – Indicates that a hold for the requested item will be placed through NCIP with the network library owning the title. Enter the message to be displayed to the patron in such cases in the associated **Configure Message Text** text box.
- Use the **Stop Request if not available** radio buttons to set the desired action in cases where a title requested through interlibrary loan is owned by a network library but *is not* currently available.
  - Select the **Yes** radio button to *cancel* the ILL request. Enter the message to be displayed to the patron in such cases in the associated **Configure Message Text** text box.
  - Select the **No** radio button to *accept* the request for processing.

43. Use the **Display Disclaimer Notice to Patrons** radio buttons to set your preference for display of a Patron Disclaimer Notice on patron ILL Request Forms.

    The Patron Disclaimer Notice allows you to add a locally-defined message or “disclaimer” note for display to patrons when submitting an ILL request.

    - Select the **Yes** radio button if you *do* wish a Patron Disclaimer Notice to be displayed on patron ILL Request Forms.
    - Select the **No** radio button if you *do not* wish a Patron Disclaimer Notice to be displayed on patron ILL Request Forms.
    - Enter the desired text for the patron notice in the **Text of the Notice** text box.

      The text of the Patron Disclaimer Notice can be a maximum of 300 characters, including spaces.

44. Use the **Display ILL Status Notice** radio buttons to set your preference for display of an ILL Status Notice on patron ILL Request Forms.

    The ILL Status Notice allows you to add a locally-defined message or note regarding ILL status for display to patrons when submitting an ILL request.

    - Select the **Yes** radio button if you *do* wish an ILL Status Notice to be displayed on patron ILL Request Forms.
    - Select the **No** radio button if you *do not* wish an ILL Status Notice to be displayed on patron ILL Request Forms.
    - Enter the desired text for the patron notice in the **Text of the Notice** text box.

      The text of the ILL Status Notice can be a maximum of 300 characters, including spaces.

45. Enter or edit address information for the participant, as appropriate:

- Enter the street address of the library in the **Address 1, Address 2, City, State/Province** and **ZIP/Postal Code** fields.

  *The **Country** field is a read-only field. This value is supplied by the system.*

- Enter the shipping name and address for the library in the Ship To Name, Ship To Address 1, Ship To Address 2, Ship To City, Ship To State/Province and Ship To ZIP/Postal Code fields.

  *The **Ship To Country** field is a read-only field. This value is supplied by the system.*

  Enter a shipping name and address only if different from the library name and street address.

- Enter any general information related to pickup/delivery times for common carriers used in shipping ILL materials in the **Route Schedule** text box.

46. Enter contact information for the *primary* ILL contact in the **Contact 1** fields:

- Select **ILL Contact** from the **Contact Type** menu.
- Enter the name of the staff member responsible for managing ILL activities for the library in the **ILL Contact Name** text box.
- Enter the title of the staff member responsible for managing ILL activities for the library in the **ILL Contact Title** text box.
- Enter the telephone number used to reach the library for *general* matters related to ILL in the **ILL Phone Number: General** text box.
- Enter the telephone number used to reach the library for matters related to *borrowing issues* in the **ILL Phone Number: Borrowing** text box.
- Enter the telephone number used to reach the library for matters related to *lending issues* in the **ILL Phone Number: Lending** text box.
- Enter the telephone number used to reach used to reach the staff member entered in the **ILL Contact Name** field in the **ILL Phone Number: Contact** text box.
- Enter the email address used to reach the library for matters related to ILL in the **ILL Email Address** text box.

  *Information entered in the **ILL Email** text box will serve as a link to automatically open an e-mail composition window with the appropriate address pre-filled by the system. Be sure to enter a properly formatted email address in the **ILL Email** text box; i.e., "ill_contact@mailserver.com."*

- Enter the fax number used to reach the library for matters related to ILL in the **ILL Fax Number** text box.
- Enter the Ariel address used to reach the library for matters related to ILL in the **Ariel Address** text box. Include a space or semi-colon between multiple Ariel addresses.
- If desired, create a list of Pickup Locations for the library (see ***Managing ILL Pickup Locations*** on page **116** for details).
- If desired, create a list of Shipping Options for the library (see ***Managing Shipping Options*** on page **117** for details).

47. If desired, enter information for *additional* contacts in the **Contact 2** and **Contact 3** fields:

- Select the appropriate contact type from the Contact Type menu; ILL Contact, Director Contact, Technical Contact, Billing Contact or Other Contact.
- Enter the name of the contact in the **Contact (#) Name** text box.

- Enter the title of the contact in the **Contact (#) Title** text box.
- Enter the telephone number for the contact in the **Contact (#) Phone Number** text box.
- Enter the email address used to reach the contact in the **Contact (#) Email Address** text box.

  *Information entered in the **Contact (#) Email Address** text box will serve as a link to automatically open an e-mail composition window with the appropriate address pre-filled by the system. Be sure to enter a properly formatted email address in the **Contact (#) Email Address** text box; i.e., "ill_contact@mailserver.com."*

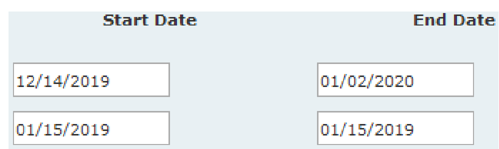
- Enter the fax number used to reach the contact in the **Contact (#) Fax Number** text box.

48. Create a **Holiday List** for the participant.

    *The **Holiday List** and **Days Requests are Processed** are used so non-business days and holidays are not counted as business days when the system calculates due dates, deadline dates, etc. Holidays should be entered in the list only when the holiday falls on a business day (a day when the library would normally be open). For example, if the library is not normally open on Sunday, you would not need to enter the Easter holiday in the Holiday List.*

    *If a request arrives at a lender that is currently on holiday, the lender is "skipped" and the request is forwarded to the next lender in the **Lender List.** The **History** note indicates a date after which the borrower may try again. If a lender is skipped, the request will appear in the **Retry** status if there are no other lenders in the **Lender List**.*

    - The **Holiday List** field on the Maintain Participant Record screen consists of 15 pairs of text boxes.
    - Enter the dates the library will be closed in the list:



      - Enter holidays using the format MM/DD/YYYY, *including* the slashes.
      - Enter the *first day* of the holiday in the **Start Date** text box. Enter the *last day* of the holiday in the **End Date** text box.
      - For single-day holidays, enter the same date in *both* the **Start Date** *and* **End Date** text boxes.

        IMPORTANT! *Do not use dashes, spaces or other non-numeric characters when entering holidays. Do not use alphabetic characters or notations when entering holidays.*

    IMPORTANT! *The system deletes dates from the **Holiday List** once the holiday has passed. Customer SuperUsers or library staff should update the **Holiday List*** annually *at the* beginning *of the year and enter holidays for the new year. This is* particularly critical *for the Participant Records for external ISO trading partners, as these libraries do not have access to the system. You may enter dates either across a row or down a column.*

49. If necessary, enter **External Communications** Information (see ***Setting Up External Trading Partners*** on page **121** for details).

50. If necessary, enter the library's Usernames and Passwords in the **OCLC Code**, **OCLC Authorization**, **OCLC Password**, **CCC Username**, **CCC Password**, **FedEx User ID**, **FedEx Password**, **UPS User ID**, **UPS Password** and **CISTI Account** text boxes.

    Linking directly to the FedEx and UPS web sites to track packages is not currently enabled, but is reserved for implementation in a future release.

51. Indicate the *general* policies for the participant by selecting the appropriate **Yes** or **No** radio buttons for the following **Other Related Information** fields, and include any explanatory information in the associated **Explanation** text boxes:

- Is the Library Open to the Public?
- Allow Borrow Material in Person
- Allow Borrow Material through ILL

52. Enter the normal business hours for the library in the **Hours Library Open** text box. If necessary, indicate any exception(s) to the normal operating hours in the **Exceptions to Library Hours Open** text box.

53. If desired, use the **Patron Notification Set-up** fields to create up to five patron notification messages for ILL requests (see ***Patron Notification Set-up*** on page **118** for details).

54. Use the **Staff Notification Set-Up** fields to configure email preferences for **Borrower emails** and **Lender emails** (see ***Staff Notification Set-Up*** on page **119** for details).

55. If necessary, edit **NCIP C-ILL Communication Parameters**.

    ***NCIP C-ILL Communication Parameters** are available only for systems utilizing the option Circ-ILL functionality. Certain information in this section is supplied automatically by the system and should not be edited or modified locally except under direction of Auto-Graphics.*

56. If the participant uses Single Sign-On functionality for authenticated access, enter the appropriate **SSO** values and parameters (see ***Configuring Single Sign-On (SSO) Functionality*** on page **121** for details).

57. Enter the URL for the library's Online Public Access Catalog (OPAC) in the **Library Catalog(URL)** text box.

58. If the library maintains a Home Page, enter the URL in the **Library Homepage(URL)** text box.

59. Enter the hours during which the library is open for ILL activities in the **ILL hours open** text box.

60. If desired, enter directions for locating the library in the **Directions** text box.

61. Enter the Uniform Resource Locators (URLs) for the library's related *online* resources in the appropriate text boxes:

    - If the library maintains a page providing a map or driving directions, enter the URL in the **Directions (URL)** text box.
    - If the library maintains a page detailing policies, rules, and/or regulations, enter the URL in the **Regulations (URL)** text box.
    - If the library maintains a page for distributing messages or announcements related to library or ILL activities, enter the URL(s) in the **System Message (URL)** and **ILL Message (URL)** text box(es), as appropriate.
    - If the library maintains a "Help" page for library or ILL services, enter the URL(s) in the **ILL Help Page (URL)** and **Library Help Page (URL)** text box(es), as appropriate.

      *The system prefills the prefix **http://**.*

      - When you enter a URL in the **ILL Help Page (URL)** text box, a **Customer Help** button is shown on the patron Blank Request Form and patron ILL Request Form. Clicking the **Customer Help** button opens the specified URL in an *additional* browser window.

62. If desired, enter Lending Policies for the library (see ***Entering Lending Policies*** on page **123** for details).

63. If desired, enter Shipping Policies for the library (see ***Entering Shipping Policies*** on page **126** for details).

64. If desired, enter ILL Acceptance Policies for the library (see ***Entering ILL Acceptance Policies*** on page **127** for details).

65. If desired, enter Copies Policies for the library (see ***Entering Copies Policies*** on page **128** for details).

66. Select the data you wish to be shown in the patron display (see ***Configuring the Patron Display*** on page **128** for details).

67. Click the **Submit** button to submit your changes to the Participant Record.

    - A confirmation dialog displays the message "Are you sure you want to make changes to the participant record for library code (*library code*)?"

68. Click the **OK** button to save your changes to the Participant Record. (Click the **Cancel** button to cancel the operation and leave the Participant Record unchanged.)

    - The message "Successfully updated Participant record!" displays at the top of the screen.

    *If you enter improperly formatted information in the Participant Record, an advisory dialog displays, identifying the information that requires correction. Click the **OK** button on the advisory dialog to close the dialog, make the necessary corrections, then click the **Submit** button again.*

69. If you have Customer SuperUser permissions, you may update additional participant records by repeating steps **1** through **66**, above.

Editing Lender Lists

The **Preferred Lender List** contains the preferred set of potential lenders for the currently selected institution. The **Network Lenders** list contains the libraries that are members of the currently selected institution's network. The **InterSystem Priority List** contains the libraries that are members of the currently selected institution's ISSI network. The **Blocked Lenders** list contains the libraries that are blocked from automatic additions (by the system) to the **Lender List** for an ILL request. For the **Preferred Lender List**, library codes should be entered in the list in descending order of preference if the consortium uses the *Preferred List* or *Rotated List* load leveling options.

You can add a Library Code to the lists, edit a Library Code in the lists, or delete a Library Code from the lists. You can also import lenders into the **Preferred Lender List** for the currently selected institution from the **Lender Priority List** in the System Wide Record. When a consortium uses both the **Preferred Lender List** and the **Lender Priority List,** when the **Lender List** for a specific request is built, the **Preferred Lender List** and the **Lender Priority List** are combined, and the second occurrence of a Library Code is deleted.

If you enter an invalid code in a lender list (a code with a typographical error or a code for a non-ILL participant), the message "The following library codes are not ILL participants and have not been added to the (preferred/network/intersystem priority) lender list: (invalid codes list)" displays at the top of the screen when you update the Participant Record, and the invalid codes are removed from the list.

To add a library:

*For the Preferred Lender List: You can also use the Add Lender function to locate lenders within your consortium for addition to the Preferred Lender List (see **Adding Lenders** on page **112** for details).*

1. On the Maintain Participant Record screen, place the cursor in the list at the position you wish to insert the new library.

2. Type the Library Code assigned by Auto-Graphics for the library you wish to add, then press the <Enter> key.

3. To add additional libraries, repeat steps **1** and **2**, above.

    If you enter an invalid code, the Participant Record will save properly when added or updated, but the invalid code will not be saved.

    - If an added lender is *already* present in the list, the second occurrence of the lender is removed when the Participant Record is updated.

To edit a Library Code:

1. On the Maintain Participant Record screen, place the cursor within the Library Code you wish to edit.
2. Using the left- and right-arrows, <Backspace> and <Delete> keys, make the desired changes to the Library Code.
3. To edit additional Library Codes, repeat steps **1** and **2**, above.

To delete *selected* libraries:

1. On the Maintain Participant Record screen, use the *left* mouse button to double-click the code of the library you wish to delete. The selected library will be highlighted.
   - To select several contiguous lenders from the list, *double-click and hold* the *left* mouse button, then drag through the list to select the desired lenders.
2. Click the *right* mouse button *on* the selected lenders to display the edit menu.
3. Use the *left* mouse button to select **Delete** from the menu.
4. To delete additional libraries, repeat steps **1** through **3**, above.

To delete *all* libraries:

1. On the Maintain Participant Record screen, click the *right* mouse button *inside* the list to display the edit menu.
2. Use the *left* mouse button to select **Select All** from the menu.
3. Click the *right* mouse button *on* the selected lenders to display the edit menu.
4. Use the *left* mouse button to select **Delete** from the menu.

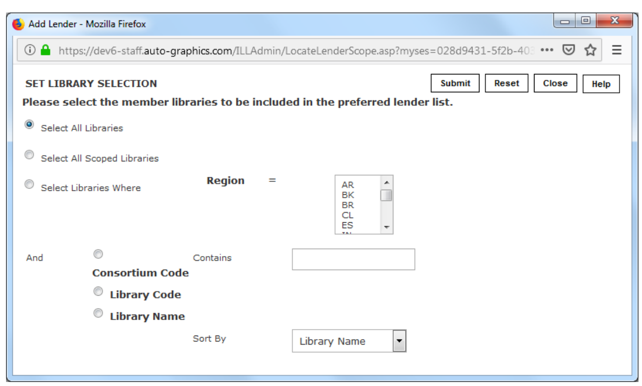
Adding Lenders

You can use the **Add Lender** function to locate lenders within your consortium for addition to the **Preferred Lender List**.

To add lenders:

1. Click the **Add Lender** button below the **Preferred Lender List**.
   - The Set Library Selection screen displays in an *additional* browser window.

   The Set Library Selection screen is customized to the requirements of each consortium. The specific options available to you may differ from those shown.



Set Library Selection Screen

2. Select the libraries from which you wish to choose your additions to the **Preferred Lender List**:
   - To select *all* member libraries, click the **Select All Libraries** radio button.
   - To select all libraries that are currently members of one or more scoping levels *for your library*, click the **Select All Scoped Libraries** radio button.

*Scoping levels are defined in the PAC Administration module (see the **PAC Administration User Guide** for details).*

- To select a subset of all member libraries, click the **Select Libraries Where** radio button and enter selection criteria, as appropriate:

  *Depending on the arrangement of your consortium, the **Select Libraries Where** screen may include a combination of list boxes (**Region** or **District**, for example) and/or text boxes (**Consortium Code**, **Library Name** or **Library Code Contains**, for example) for specifying selection criteria.*

  - Make the desired selection(s) from the appropriate list boxes, and enter text in the appropriate text boxes.

    To select multiple entries in a list box, hold down the <CTRL> key and click all desired entries.

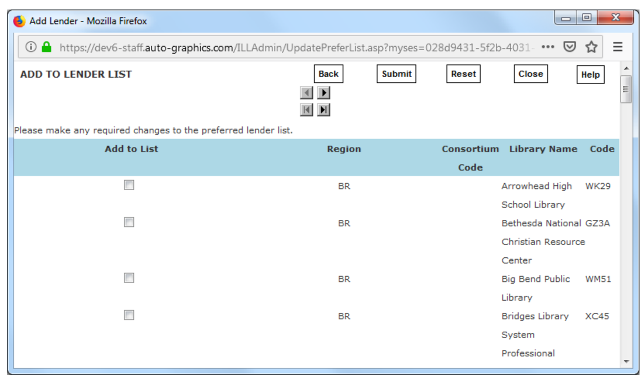
- Select the order in which you wish your results to be sorted from the **Sort By** menu, **Consortium Code**, **Library Code** or **Library Name**.

3. Click the **Submit** button. (Click the **Reset** button to return the **Set Library Selection** screen to its initial conditions (i.e., **Select All Libraries**) if you wish to make changes to your selection criteria. Click the **Close** button to cancel the selection of libraries and return to the Maintain Participant Record screen.)

   - The Add to Lender List screen displays.

     *If there are no matches to your selection criteria, the message "There were no matches to your selection criteria. Please verify your choices and reenter." displays. Click **Go Back** to return to the Set Library Selection screen and revise your selection criteria.*

4. Select the libraries you wish to add to the **Preferred Lender List**, as appropriate.

   Add to Lender List

   - Use the ◀ and ▶ buttons to scroll backwards and forwards through the list, one page at a time.
   - Use the |◀ and ▶| buttons to scroll to the first or last page of the list, respectively.
   - To mark a library for addition to the **Preferred Lender List**, select the **Add to List** checkbox for the desired library.
     - A *checkmark* indicates the associated library *is* selected.
     - An *empty checkbox* indicates the associated library *is not* selected.
     - Clicking a checkbox repeatedly will toggle it on and off.

5. When all desired libraries have been selected, click the **Submit** button.

   - A confirmation dialog displays the message "The selected libraries will be appended to your preferred lender list. Do you want to continue?"

6. Click the **OK** button on the confirmation dialog to add the selected libraries to the end of the **Preferred Lender List**. (Click the **Cancel** button to cancel the addition and return to the Add to Lender List screen.)

   - To add additional libraries to the end of the **Preferred Lender List**, click the **Back** button on the Add to Lender List screen to return to the Set Library Selection screen.
   - To exit the **Add Lenders** function, click the **Close** button on the Add to Lender List screen to close the window and return to the Maintain Participant Record screen.

7. To move a Library Code in the **Preferred Lender List** to a *new position*:

   - Use the *left* mouse button to double-click the code of the library you wish to move. The selected library will be highlighted.
     - To select several contiguous lenders from the **Preferred Lender List**, *double-click and hold* the *left* mouse button, then drag through the list to select the desired lenders.
   - Click the *right* mouse button *on* the selected lenders to display the **Preferred Lender List** edit menu.
   - Use the *left* mouse button to select **Cut** from the menu.
   - Place the cursor in the **Preferred Lender List** at the position you wish to move the selected libraries, then press the <Enter> key to create a "blank" line in the list at the selected location.
   - Click the *right* mouse button *on* the "blank" line to display the **Preferred Lender List** edit menu.
   - Use the *left* mouse button to select **Paste** from the menu.

8. Click the **Submit** button to submit your changes to the Participant Record.

   - A confirmation dialog displays the message "Are you sure you want to make changes to the participant record for library code (*library code*)?"

9. Click the **OK** button to save your changes to the Participant Record. (Click the **Cancel** button to cancel the operation and leave the Participant Record unchanged.)

   - The message "Successfully updated Participant record!" displays at the top of the screen.

Importing Lenders into Lender Lists

You may import lenders into the **Preferred Lender List**, **Network Lenders** list, **InterSystem Priority List** or **Blocked Lenders** list for the currently selected institution using the **Lender Priority List** (System Wide list) in the **System Wide Record** as the source.

To import selected lenders into a lender list:

1. Using the *left* mouse button, double-click the name of the library you wish to add from the **System Wide** lender list. The selected library will be highlighted.

   - To select several contiguous lenders from the list, *double-click and hold* the *left* mouse button, then drag through the list to select the desired lenders.

2. Click the *right* mouse button *on* the selected lenders to display the **System Wide** lender list edit menu.
3. Use the *left* mouse button to select **Copy** from the menu.
4. Use the *right* mouse button to position the cursor in the desired lender list the position in which you wish to insert the lender(s); the lender list edit menu displays.
5. Use the *left* mouse button to select **Paste** from the menu.

   - If a selected lender is already entered in the lender list, the second occurrence of the lender is removed when the Participant Record is updated.

6. Repeat steps **1** through **5** to add additional lenders to the lender list.
7. Click the **Submit** button to submit your changes to the Participant Record.

   - A confirmation dialog displays the message "Are you sure you want to make changes to the participant record for library code (*library code*)?"

8. Click the **OK** button to save your changes to the Participant Record. (Click the **Cancel** button to cancel the operation and leave the Participant Record unchanged.)

- The message "Successfully updated Participant record!" displays at the top of the screen.

To import all lenders into a lender list:

1. Click the *right* mouse button *inside* the **System Wide** lender list to display the **System Wide** lender list edit menu.
2. Use the *left* mouse button to select **Select All** from the menu.
3. Click the *right* mouse button *on* the selected lenders to display the **System Wide** lender list edit menu.
4. Use the *left* mouse button to select **Copy** from the menu.
5. Use the *right* mouse button to position the cursor in the desired lender list the position in which you wish to insert the lender(s); the lender list edit menu displays.
6. Use the *left* mouse button to select **Paste** from the menu.
   - If a selected lender is already entered in the lender list, the second occurrence of the lender is removed when the Participant Record is updated.
7. Click the **Submit** button to submit your changes to the Participant Record.
   - A confirmation dialog displays the message "Are you sure you want to make changes to the participant record for library code (*library code*)?"
8. Click the **OK** button to save your changes to the Participant Record. (Click the **Cancel** button to cancel the operation and leave the Participant Record unchanged.)
   - The message "Successfully updated Participant record!" displays at the top of the screen.
   - If a selected lender is already entered in the Participant **Lender List**, the second occurrence of the lender is removed when the Participant Record is updated.

Managing Patron's Payment Options

The **Maintain Participant Record** function allows **Patron's Payment Options** (such as cash, check, credit card) for materials supplied through interlibrary loan to be specified for a participant library. Once defined, patrons may select one of the payment options included in the drop-down menu on each ILL request generated.

The Patron's Payment Options field is shown only when the Show Patron Willingness To Pay Message option has been set to Yes.

To add a payment option:

1. Use the *left* mouse button to place the cursor in the **Patron's Payment Options** list at the position you wish to add the payment option. If the **Patron's Payment Options** list is currently empty, the cursor is placed at the top position in the list.
2. Enter a description of the payment option.

   You may use any description you wish for a payment option. The payment option description can be alphanumeric, upper- and lower-case, and can include spaces. The payment option description cannot *exceed 50 characters, including spaces.*

To edit a payment option:

1. Place the cursor within the payment option description you wish to edit.
2. Using the left- and right-arrows, <Backspace> and <Delete> keys, make the desired changes.

To delete selected payment options from the list:

*If you delete a payment option from the **Patron's Payment Options** list, any ILL requests for which the deleted payment option was specified will retain the deleted payment option.*

1. Using the *left* mouse button, double-click the payment option you wish to delete. The selected payment option is highlighted.
   - To select several contiguous payment options in the **Patron's Payment Options** list, *double-click and hold* the *left* mouse button, then drag through the list to select the payment options.
2. Click the *right* mouse button on the selected payment option(s) to display the **Patron's Payment Options** edit menu.
3. Use the *left* mouse button to select **Delete** from the menu.

To delete all payment options from the list:

1. Click the *right* mouse button inside the **Patron's Payment Options** list to display the **Patron's Payment Options** edit menu.
2. Use the *left* mouse button to choose **Select All** from the menu.
3. Click the *right* mouse button on the selected payment options to display the **Patron's Payment Options** edit menu.
4. Use the *left* mouse button to select **Delete** from the menu.

Managing ILL Pickup Locations

The **Maintain Participant Record** function allows **ILL Pickup Locations** to be specified for a participant library. Once defined, patrons may select one of the pickup locations included in the drop-down menu on each ILL request generated.

To add an ILL Pickup Location:

1. Use the *left* mouse button to place the cursor in the **ILL Pickup Locations** list at the position you wish to add the location. If the **ILL Pickup Locations** list is currently empty, the cursor is placed at the top position in the list.
2. Enter a name for the pickup location.

   You may use any name you wish for a pickup location. The pickup location name can be alphanumeric, upper- and lower-case, and can include spaces. The pickup location name cannot *exceed 50 characters, including spaces.*

   If you wish to establish a default *pickup location of "None," enter "None" as the* first *pickup location in the **Pickup Locations** list.*

To edit an ILL Pickup Location:

1. Place the cursor within the pickup location name you wish to edit.
2. Using the left- and right-arrows, <Backspace> and <Delete> keys, make the desired changes.

To delete *selected* ILL Pickup Locations from the list:

*If you delete an ILL Pickup Location from the **ILL Pickup Locations** list, any ILL requests for which the deleted location was specified will retain the deleted location.*

1. Using the *left* mouse button, double-click the name of the pickup location you wish to delete. The selected pickup location is highlighted.
   - To select several contiguous names in the **ILL Pickup Locations** list, *double-click and hold* the *left* mouse button, then drag through the list to select the pickup location.
2. Click the *right* mouse button on the selected pickup location(s) to display the **ILL Pickup Locations** edit menu.
3. Use the *left* mouse button to select **Delete** from the menu.

To delete *all* Pickup Locations from the list:

1. Click the *right* mouse button inside the **ILL Pickup Locations** list to display the **ILL Pickup Locations** edit menu.
2. Use the *left* mouse button to select **Select All** from the menu.
3. Click the *right* mouse button on the selected pickup locations to display the **ILL Pickup Locations** edit menu.
4. Use the *left* mouse button to select **Delete** from the menu.

Managing Shipping Options

The **Maintain Participant Record** function allows **Shipping Options** to be specified for a participant library. Once defined, patrons may select one of the pickup locations included in the drop-down menu on each ILL request generated.

To add a Shipping Option:

1. Use the *left* mouse button to place the cursor in the **Shipping Options** list at the position you wish to add the location. If the **Shipping Options** list is currently empty, the cursor is placed at the top position in the list.
2. Enter a name for the shipping option.

   You may use any name you wish for a shipping option. The shipping option name can be alphanumeric, upper- and lower-case, and can include spaces. The shipping option name cannot *exceed 50 characters, including spaces.*

   If you wish to establish a default *shipping location of "None," enter "None" as the* first *shipping option in the **Shipping Options** list.*

To edit a Shipping Option:

1. Place the cursor within the shipping option name you wish to edit.
2. Using the left- and right-arrows, <Backspace> and <Delete> keys, make the desired changes.

To delete *selected* Shipping Options from the list:

*If you delete a shipping option from the **Shipping Options** list, any ILL requests for which the deleted option was specified will retain the deleted option.*

1. Using the *left* mouse button, double-click the name of the shipping option you wish to delete. The selected shipping option is highlighted.
   - To select several contiguous names in the **Shipping Options** list, *double-click and hold* the *left* mouse button, then drag through the list to select the shipping options.

2. Click the *right* mouse button on the selected shipping option(s) to display the **Shipping Options** edit menu.

3. Use the *left* mouse button to select **Delete** from the menu.

To delete *all* Shipping Options from the list:

1. Click the *right* mouse button inside the **Shipping Options** list to display the **Shipping Options** edit menu.

2. Use the *left* mouse button to select **Select All** from the menu.

3. Click the *right* mouse button on the selected shipping options to display the **Shipping Options** edit menu.

4. Use the *left* mouse button to select **Delete** from the menu.

Patron Notification Set-up

The **Patron Notification Set-up** section of the Maintain Participant Record screen lets you create *up to five* messages intended to notify library patrons of the current status of their ILL requests. Each notice is configured with a *default* set of fields (and associated field codes) for text that is extracted by the system from the ILL request for which the notification is generated.

Each notice is associated with a *selected* ILL status. When an ILL request enters a status category for which a patron notification message exists, the system *automatically* sends the associated message to the email address specified when the ILL request was generated. If a patron's User Record contains an email address, but the address *is not* transferred to the ILL Request Form, email notification *will not* be sent.

To set up patron notification messages:

1. Select the ILL status for which you wish a message to be sent from the *first* **ILL Status** menu.
   - Patron notification messages can be created for the **Pending**, **Received** – no attachments, **Received** with attachments, **Recalled**, **Overdue**, **Returned**, **Unfilled**, **Cancelled**, **Accepted Renewal**, **Rejected Renewal**, **Conditional**, **Need by Expired** and **Retry** status categories only.

2. If desired, you can delete *one or more* default fields (and associated field codes) from an **E-Mail** text field if you do not wish the content to be included in the patron notification message.

3. Enter the text for the patron notification message in the *first* **E-Mail Text** field.
   - The **E-Mail Text** can be a *maximum* of 1400 characters, *including spaces*.
   - A character counter is provided to indicate the number of available characters remaining.

4. Repeat steps **1** and **2** using the remaining **ILL Status** menus and associated **E-Mail Text** fields to create *additional* patron notification messages, as desired.

5. Enter the "Subject line" text to be included in *each* patron notification message in the **Email Notice Subject** text box.

6. Enter the "From" name to be included in *each* patron notification message in the **Email Notice from Name** text box.

7. Enter the "From" address to be included in *each* patron notification message in the **Email Notice from Address** text box.

8. If you wish "courtesy copies" of patron notification messages to be sent to another individual, enter the email address to which the copies should be sent in the **CC Email Address (optional)** text box.

*If you have entered patron notification setup parameters in one or more **ILL Status** menus and **E-Mail Text** fields, but have not entered values in the **Email Notice Subject**, **Email Notice from Name** and/or **Email Notice from Address** text boxes, an advisory dialog displays the message "Please enter text in the following fields: (required fields)" when you **Update** the Participant Record. If you do wish to complete the* *patron notification setup, click the **OK** button on the advisory message, enter values for the required fields, then click the **Update** button to save your changes. If you do not wish to complete the patron notification setup, click the **Cancel** button on the advisory message. Menu selections and text for all **ILL Status** menus and **E-Mail Text** fields will be cleared.*

Patron Notification Field Codes

Each **E-Mail Text** field in the **Patron Notification Set-up** section of the Maintain Participant Record screen is configured with a *default* set of fields (and associated field codes) for text that is extracted by the system from the ILL request for which the notification is generated. These fields can be rearranged, deleted, or inserted at any location in the **E-Mail Text** message. A list of default fields and field codes is provided below.

Patron Notification E-Mail Text Field Codes

Field Label	Field Code	Field Label	Field Code
Name:	#Patron's First Name# #Patron's Last Name#	Edition:	#Edition#
Pickup at:	#Pickup Location#	Description:	#Physical Description#
Title:	#Title#	Series:	#Series#
Author:	#Author/Creator#	Request Date:	#Request Date#
Due Date:	#Due Date#		

Staff Notification Set-Up

The **Staff Notification Set-Up** section of the Maintain Participant Record screen lets you configure preferences for receiving emails for ILL requests processed as a borrower or as a lender. Each email text field in the **Staff Notification Set-up** section of the Maintain Participant Record screen is configured with *default* text and includes field codes for content that is extracted by the system from the ILL request for which the notification is generated. This text can be customized as desired. A list of field codes is provided below.

Staff Notification E-Mail Text Field Codes

Field Code	Content	Field Code	Content
#author#	The author of the requested item	#callnumber#	The call number of the requested item
#libcode#	The library code of the library receiving the request	#libname#	The name of the library receiving the request
#PatronFirstName#	The first name of the patron that placed the request (this field is intended for use in **Borrower emails** *only*)	#PatronLastName#	The last name of the patron that placed the request (this field is intended for use in **Borrower emails** *only*)
#requestid#	The system generated request ID for the ILL request	#title#	The author of the requested item

To configure email preference:

1. Use the **Borrower emails** options to configure email preferences for ILL requests processed as a *borrower*:
   - Enter the e-mail address(es) to which ILL notifications should be sent in the **Email notification address** text box.
     - When entering *multiple* email addresses, separate the addresses with a semicolon. *Do not* include spaces.

- Use the checkboxes to select the status values for which you with to receive email notification *as a borrower*.

  Email notification will be sent each time an ILL request transitions to a selected status.

  - A *checkmark* ☑ indicates email notification *will be* sent each time an ILL request transitions to the associated status.
  - An *empty checkbox* ☐ indicates email notification *will not be* sent when ILL requests transition to the associated status.
  - Clicking a checkbox repeatedly will toggle it on and off.

2. Use the **Lender emails** options to configure email preferences for ILL requests processed *as a lender*:

- Enter the e-mail address(es) to which ILL notifications should be sent in the **Email notification address** text box.
  - When entering *multiple* email addresses, separate the addresses with a semicolon. *Do not* include spaces.
- Use the checkboxes to select the status values for which you with to receive email notification *as a borrower*.

  Email notification will be sent each time an ILL request transitions to a selected status.

  - A *checkmark* ☑ indicates email notification *will be* sent each time an ILL request transitions to the associated status.
  - An *empty checkbox* ☐ indicates email notification *will not be* sent when ILL requests transition to the associated status.
  - Clicking a checkbox repeatedly will toggle it on and off.

Defining Default Lenders

The **Maintain Participant Record** form has been enhanced to allow libraries to specify two default lenders.

Default lenders are able to assume the role of the borrowing library in modifying an ILL request. Default lenders perform additional searching and verification for requests that have not been verified or located by the borrowing library. Default lenders (such as a library system headquarters or the state library) have additional tools and resources not available to the borrower. One or two default lenders may be configured. Use of two default lenders permits the first default lender to send requests to the secondary default lender for even more in-depth verification.

When specified, the default lenders (along with **Days to Respond** taken from the associated Participant Record) are appended to the end of the **Lender List** for all ILL requests generated within AGent. You can define the default lenders for your consortium.

When a library is designated as a default lender, keep the following in mind:

- A library with a collection (and library code for that collection) may serve as a default lender. In this case, a *second* library code must be assigned to the library for the default lender functionality. Please contact Auto-Graphics to assign a separate library code for the default lender.
- The **Preferred Lender List** for the library is not displayed in the Participant Record.
- The **Preferred Lender List**, **Primary Default Lender** and **Secondary Default Lender** fields are removed from the Participant Record for the library designated as a default lender.
- The library code for the library designated as a default lender is removed from the **Lender Priority List** in the System Wide Record.

- The library code for the library designated as a default lender is removed from the **Preferred Lender List** in *all* Participant Records for your consortium.

To define a default lender:

1. On the Maintain Participant Record screen, enter or edit the code assigned by Auto-Graphics for the library you wish to designate as a default lender in the **Library Code** text box. The **Library Code** text box initially contains the code for the library under which you logged in.
2. Access the record for the participant:
   - Click the **Search** button.
   - If a record *does not exist* for the library, the message “Participant record not found.” displays at the top of the screen.
   - If a record *does exist* for the library, the Participant Record for the selected library displays.
3. Select the **Is this library a default lender? - Yes** radio button.

   *The **Is this library a default lender** radio buttons are available to Customer SuperUsers* only.
4. Click the **Update** button to submit your changes to the Participant Record.
   - The message “Successfully updated Participant record!” displays at the top of the screen.

Configuring Single Sign-On (SSO) Functionality

Single Sign-On (SSO) is an authentication method often used by academic libraries allowing students to use the same login for all areas of the campus (classes, library, loans, etc).

To configure Single Sign-On (SSO) Functionality:

1. Use the **SAML Active** radio buttons to indicate whether SSO functionality is supported using Security Assertion Markup Language (SAML).
   - Select **Yes** if SAML *is* used to support SSO functionality.
   - Select **No** if SAML *is not* used to support SSO functionality.
2. If the **SAML Active – Yes** radio button is selected:
   - Enter the name of the participants SAML service provider in the **SAML Service Provider** text box.
   - Enter the name of the SAML Identity Provider in the **SAML Identity Provider** text box.
   - Enter text for the SAML message in the **SAML Message Text** text box.
   - Enter text for the SAML Link in the **SAML Link Text** text box.

Setting Up External Trading Partners

*When updating a Participant Record for an ISO trading partner outside your consortium, you must contact Auto-Graphics Technical Services to assign a standard **ISO System Code** and **Code Type** for the participant.*

*The **System type - NCIP-Verso ILL** and **Transport method - Verso URL** options are intended for use with Circ-ILL (see the **Circ-ILL User Guide** for more information), and must NEVER be selected when setting up an ISO trading partner or Generic Script messaging.*

Importing a Master Participant Record

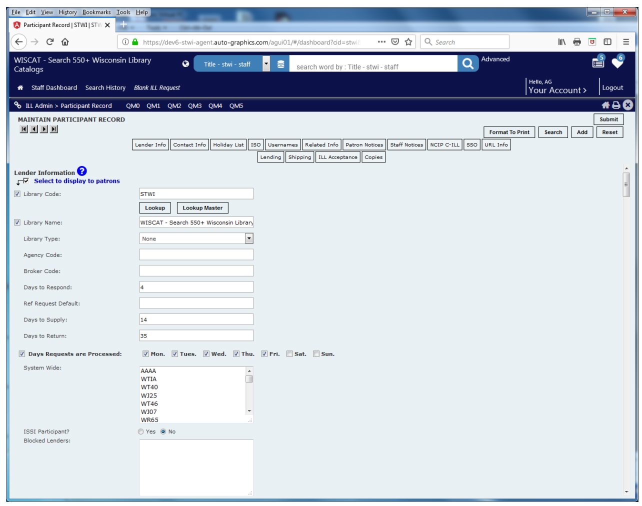
*The **Lookup Master** feature is available for "ISO Open" systems only. The **Lookup Master** feature is available only to Customer SuperUsers that have been granted "Change Any Library" permissions (see the **User Administration User Guide** for more information).*

The **Lookup Master** feature lets you import the Master Participant Record for an *external* ISO trading partner (a trading partner *outside* the SHAREit system) from the master participant database into your consortium's database. The **Lookup Master** feature is available from *any* Participant Record.

Once imported, the record can be updated by *any* ILL staff member that has been granted "Change Any Library" permission (see the ***User Administration User Guide*** for more information).

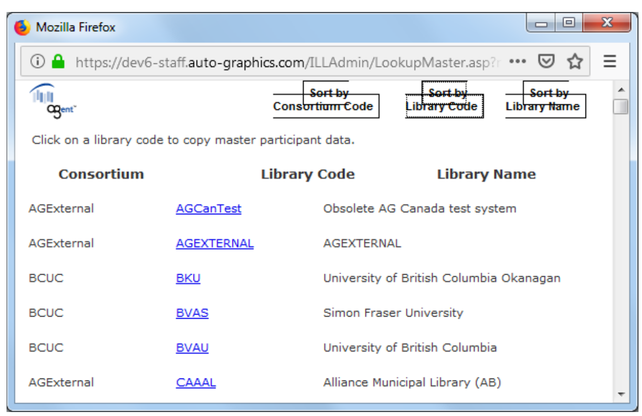
To import a Master Participant Record:

1. Access the Maintain Participant Record screen for *any* participant library.
2. Click the **Lookup Master** button.
   - The Master Participant Lookup screen displays in an *additional* browser window. This list shows the **Consortium Code**, **Library Code** and **Library Name** for *all* Master Participant Records in the database.
   - Click the **Sort by Consortium Code** button to sort the list alphabetically by **Consortium Code**.
   - Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.
   - Click the **Sort by Library Name** button to sort the list alphabetically by **Library Name**.



Maintain Participant Record Screen

3. Click the **Library Code** for the participant you wish to import into your consortium's database.
   - The confirmation message "Master participant data for (*participant name*) has been copied to your participant file. Close this window and click on "Search" to view the results." displays.
4. Click the **Close** button on the confirmation message to close the message and return to the previous Maintain Participant Record screen, with the library code of the imported participant entered in the **Library Code** text box.



Master Participant Lookup Screen

5. Click the **Search** button on the Maintain Participant Record screen to access the imported Master Participant record. The record may now be updated as desired (see ***Updating a Participant Record*** on page **99** for details).

*Participant Records that have been imported using the **Lookup Master** feature include the notation "This library is included in the Master Participant list." at the end of the **External Communications** field.*

Setting Up an ISO Trading Partner

When updating a Participant Record for an ISO trading partner *outside* your consortium, the Participant Record *must* include the following information and option selections:

***IMPORTANT:** When updating a Participant Record for an ISO trading partner, content is required in all **External Communications** fields. If one or more fields are left blank, an advisory message displays when the Participant Record is saved. Additionally, the **ISO System Code** and **Code Type** fields (assigned by Auto-Graphics) must be unique. If the system detects the **ISO System Code** and **Code Type** values have been assigned to another library, an advisory message displays. Contact Auto-Graphics for assistance.*

- Verify that a standard **ISO System Code** and **Code Type** have been assigned to the library by Auto-Graphics.
- Select **ISO ILL** from the **System type** menu.
- Select the transmission method for ILL requests from the **Transport method** menu; either **Direct connection (TCP/IP)** or **E-mail (SMTP)**.
    - If **Direct connection (TCP/IP)** was selected as the **Transport method**, enter the address and port number for the computer that will process requests in the **Computer or Email Address** and **Computer Port No.** fields.
    - If **E-mail (SMTP)** was selected as the **Transport method**, enter the email address to which requests should be sent in the **Computer or Email Address** field. Leave the **Computer Port No.** field *blank*.

Setting Up Generic Script Messaging

Generic script messaging is intended primarily for communication with AVISO (or other similar) ILL management software.

- Verify that a standard **Code** and **Code Type** have been assigned to the participant by Auto-Graphics.
- Select Generic Script messages from the System type menu.
- Select E-mail (SMPT) from the Transport method menu.
- Enter the email address to which requests should be sent (the email address of the AVISO or other ILL manager) in the **Computer or Email Address** field. Leave the **Computer Port No.** field *blank*.

Entering ILL Policies

The Participant Record contains links which allow you to enter *detailed* policy information for the associated library's ILL activities, including:

- Lending Policies
- Shipping Policies
- ILL Acceptance Policies
- Copies Policies

Entering Lending Policies

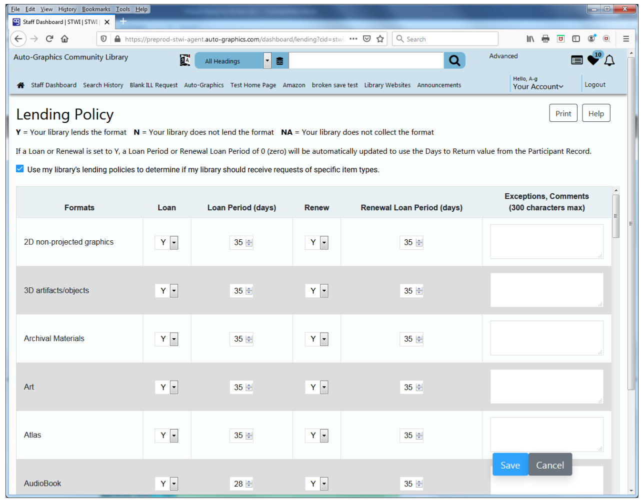
Lending policies define the policies associated with lending your library's materials *through interlibrary loan only*. When the **Use my library's lending policies** feature is enabled, lending policies are also used to determine due dates for items supplied through interlibrary loan.

To enter lending policies:

1. Click the **Lending** button at the top of the Maintain Participant Record form (see ***Maintaining Participant Records*** on page **99** for details).

   - The Lending Policy screen displays. The screen shows an alphabetical list of all formats (material types) supported by your library's SHAREit system.

   - The Lending Policy lets you to enter your library's lending policy. For each **Format** listed, you can indicate whether you **Loan** items of the associated material type through ILL, the **Loan Period (days)**, whether you accept **Renew** request for items on loan through ILL, the **Renewal Load Period (days)** and other explanatory information (**Exceptions, Comments**) for each format.



Lending Policy Screen

2. Use the **Use my library's lending policies** checkbox to set the "apply lending policies" selection for your library.

   *The **Use my library's lending policies** checkbox is available only if your library has enabled the optional "Apply lending policies to ILL requests" feature. When this feature is enabled and an ILL request is submitted, the system checks the status of the "apply lending policy" option for your library to determine if it should remain in the **Lender List** for the request, using the criteria specified below.*

   - A *checkmark* indicates that Lending Policies *will be* used to determine if your library should be included in the Lender List for a specific ILL request. The Lending Policies will be applied only to requests generated from Full Record Displays. The Lending Policies will not be applied to requests generated from the Blank Request Form.

     - If the "apply lending policy" option *is selected*, and your library *does* lend the requested material type through interlibrary loan, your library remains in the **Lender List** for *borrow* requests.

     - If the "apply lending policy" option *is selected*, and your library *does not* lend the requested material type through interlibrary loan, your library is removed from the **Lender List** for *borrow* requests.

   - An *empty checkbox* indicates that Lending Policies *will not be* used to determine if your library should be included in the Lender List for a specific ILL request.

     - If the "apply lending policy" option *is not selected*, your library remains in the Lender List.

   - Clicking the checkbox repeatedly will toggle it on and off.

3. Indicate the **Formats** your library lends by selecting the appropriate response from the **Loan** menu for *each* format.

   - Select **Y** (for Yes) if your library *does lend* the associated format.

   - Select **N** (for No) if your library *does not lend* the associated format.

   - Select **NA** (for Not Applicable) if your library *does not collect* the associated format.

   - The default selection for the **Loan** menu is **N**.

4. Enter the initial **Loan Period (days)** for *each* format your library lends in the respective text boxes.

   *Set the **Loan Period (days)** value to "0" for formats your library does not lend or does not collect.*

*If desired, use the buttons to increase or decrease the **Loan Period (days)** value in one-day increments.*

- You may enter any value from “1” to “365” days.
- 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 (days)** text box.

  *When the **Loan** menu selection for a given **Format** is set to **Y**, and a “0” is entered in the **Loan Period (days)** text box, the **Loan Period (days)** value updates to the **Days to Return** value from your library’s Participant Record when lending policies are saved.*

5. Indicate the material types for which your library allows renewals by selecting the appropriate response from the **Renew** menu for each format.

   - Select **Y** (for Yes) if your library *does* allow renewals for items of the associated format.
   - Select **N** (for No) if your library *does not* allow renewals for items of the associated format.
   - Select **NA** (for Not Applicable) if your library *does not collect* the associated format.

     *Do not select **Y** from the **Renew** menu for material types your library does not lend or does not collect.*

     *If a renewal request is received for a material type for which the **Renew** value is set to **N** or **NA**, the system automatically updates the request to **Rejected Renewal** status.*

6. Enter the **Renewal Loan Period (days)** for *each* format for which your library allows renewals in the respective text boxes.

   *Leave the **Renewal Loan Period (days)** text box “blank” for formats for which your library does not allow renewals.*

   *If desired, use the buttons to increase or decrease the **Renewal Loan Period (days)** value in one-day increments.*

   - You may enter any value from “1” to “365” days.

     *The **Renewal Loan Period** (rather then 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 (days)** text box.

     *When the **Renew** menu selection for a given **Format** is set to **Y**, and a “0” is entered in the **Renewal Loan Period (days)** text box, the **Renewal Loan Period (days)** value updates to the **Days to Return** value from your library’s Participant Record when lending policies are saved.*

7. Enter any comments or exceptions related to the lending policy for *each* format your library lends in the associated **Exceptions, Comments** text box.

   - **Exceptions, Comments** text is limited to 300 characters, *including spaces*.

8. When lending policies have been entered for *all* listed **Formats**, click the **Save** button to submit your changes to lending policies.

   - The message “Success” shows briefly at the top of the screen.

   *If you leave a **Loan Period (days)** or **Renewal Loan Period (days)** text box blank, or enter a value greater than “32767,” an error message shows briefly at the top of the screen. Correct the **Loan Period (days)** or **Renewal Loan Period (days)** value(s) as necessary, then resubmit your changes.*

9. Click the **Cancel** button to close the Lending Policy screen and return to the Maintain Participant Record form.

Entering Borrowing Policies

Borrowing policies define whether or not a library allows library guests, patrons and staff user types to submit ILL borrow requests for *a given material type*. When a given user type is prohibited from submitting ILL borrow requests for a specified material type, display of the **Request This Item** button is suppressed on Brief Browse Lists and Full Record Display for items of the associated material type.

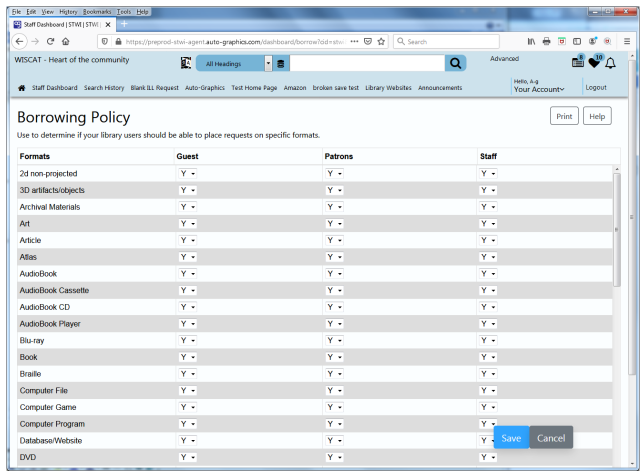
To enter borrowing policies:

1. Click the **Borrowing** button at the top of the Maintain Participant Record form (see ***Maintaining Participant Records*** on page **99** for details).

    - The Borrowing Policy screen displays. The screen shows an alphabetical list of all formats (material types) supported by your library's SHAREit system.

2. Use the **Guest**, **Patrons** and **Staff** user type menus for each format to indicate if the associated user type can submit ILL borrow requests for items of the associated format.

    - Select **Y** (for Yes) if the associated user type *can* submit ILL borrow requests for items of the associated format (material type).
    - Select **N** (for No) if the associated user type *cannot* submit ILL borrow requests for items of the associated format (material type).
    - The default selection for the **Guest**, **Patrons** and **Staff** user type menus is **Y**.



Borrowing Policy Screen

3. When borrowing policies have been specified for *all* listed formats (material types), click the **Save** button to submit your changes to borrowing policies.

    - The message "Success" shows briefly at the top of the screen.

4. Click the **Cancel** button to close the Borrowing Policy screen and return to the Maintain Participant Record form.

To print borrowing policies:

- Click the **Print** button on the Borrowing Policy screen.
    - A standard Print dialog displays.
- Make the desired selections on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

Entering Shipping Policies

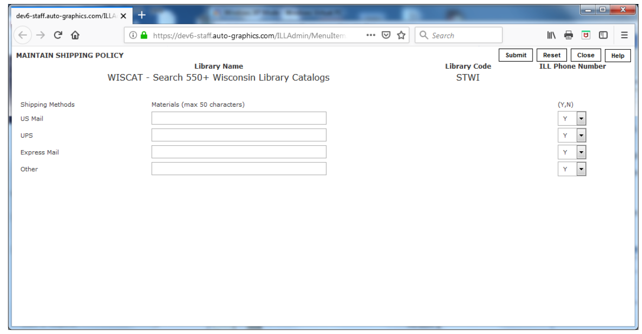
Shipping policies define the authorized shipping methods for materials provided *through interlibrary loan*.

To enter shipping policies:

1. Click the **Shipping** button at the top of the Maintain Participant Record form (see ***Maintaining Participant Records*** on page **99** for details).

    - The Maintain Shipping Policy screen displays in an *additional* browser window.

- The **Library Name**, **Library Code** and **ILL Phone Number** for the current library are displayed at the top of the screen.
- The Maintain Shipping Policy screen provides a listing of **Shipping Methods**, and lets you specify the approved shipping methods (and associated **Materials** for *each* shipping method).



Maintain Shipping Policy Screen

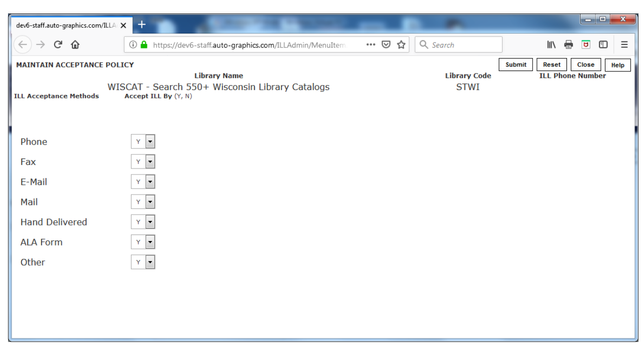
2. Indicate the authorized shipping methods for your library by selecting the appropriate response from the (**Y, N**) menu for *each* shipping method.
   - Select **Y** (for Yes) if use of the associated shipping method *is* authorized.
   - Select **N** (for No) if use of the associated shipping method *is not* authorized.
   - The default selection for the (**Y, N**) menu is **N**.
3. Indicate the material types that may be shipped by *each authorized shipping method* in the associated **Materials** text box.
   - If *all* material types may be shipped by a given shipping method, enter **Any** in the **Materials** text box, or leave the text box blank.
   - **Materials** text *cannot* exceed 50 characters, including spaces.
4. When shipping policies have been entered for *all* listed shipping methods, click the **Submit** button to submit your changes to the shipping policies.
   - The message "Successfully updated Shipping Policy record!" displays.
   - Click the **Close** button to close the Maintain Shipping Policy browser window.

Entering ILL Acceptance Policies

ILL acceptance policies define the authorized methods for submitting interlibrary loan requests to your library.

To enter ILL acceptance policies:

1. Click the **ILL Acceptance** button at the top of the Maintain Participant Record form (see ***Maintaining Participant Records*** on page **99** for details).
   - The Maintain Acceptance Policy screen displays in an *additional* browser window.
   - The **Library Name**, **Library Code** and **ILL Phone Number** for the current library are displayed at the top of the screen.



Maintain Acceptance Policy Screen

   - The Maintain Acceptance Policy screen provides a list of **ILL Acceptance Methods**, and lets you specify the approved methods for submitting ILL requests to your library.

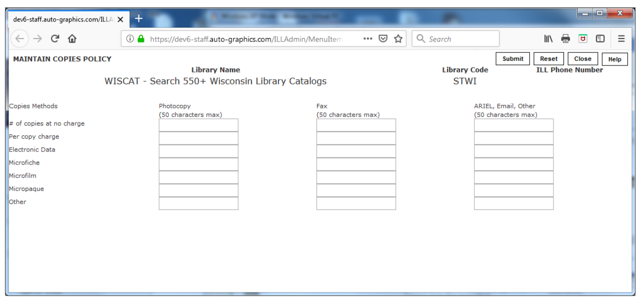
2. Indicate the methods by which your library accepts interlibrary loan requests by selecting the appropriate response from the **Accept ILL By** menu for *each* submission method.
   - Select **Y** (for Yes) if use of the associated submission method *is* authorized.
   - Select **N** (for No) if use of the associated submission method *is not* authorized.
   - The default selection for **Accept ILL By** menu is **N**.
3. When ILL acceptance policies have been entered for *all* listed acceptance methods, click the **Submit** button to submit your changes to ILL acceptance policies.
   - The message "Successfully updated ILL Acceptance Policy record!" displays.
   - Click the **Close** button to close the Maintain Acceptance Policy screen.

Entering Copies Policies

Copies policies define your library's policies for providing copies of various types of media.

To enter copies policies:

1. Click the **Copies** button at the top of the Maintain Participant Record form (see ***Maintaining Participant Records*** on page **99** for details).
   - The Maintain Copies Policy screen displays in an *additional* browser window.
   - The **Library Name**, **Library Code** and **ILL Phone Number** for the current library are displayed at the top of the screen.



Maintain Copies Policy Screen

   - The Maintain Copies Policy screen provides a list of methods by which copies may be provided (**Photocopy** - **FAX** - **ARIEL**, **Email**, **Other**), and lets you specify your library's policies for providing copies of each type.
2. For each media type listed, enter your library's reproduction policy in the **Photocopy, FAX,** and **ARIEL, Email, Other** text boxes.
   - Copies policy text *cannot* exceed 50 characters, including spaces.
3. When copies policies have been entered for *all* listed media types, click the **Submit** button to submit your changes to copies policies.
   - The message "Successfully updated Copies Policy record!" displays.
   - Click the **Close** button to close the Maintain Copies Policy screen.

Configuring the Patron Display

Most data fields on the Participant Record include a **Select to display to patrons** checkbox. These checkboxes allow you to select which information will be displayed to patrons when they access a Participant Record either by searching library information, or by clicking the Locations link in the **Locations Information** section of a Full Record Display.

*Data fields without a **Select to display to patrons** checkbox cannot be selected for patron display.*

To configure the patron display:

- By default, *all information* in the participant record is initially *selected* for patron display.
- A *checkmark* indicates the associated data *is selected* (will be included in the patron display).
- An *empty checkbox* indicates the associated data *is not selected* (will not be included in the patron display).
- Clicking a **Select to display to patrons** checkbox for a given data field will toggle it on and off.

Linking to Participant Information

ILL Policies created from within SHAREit (using the **Maintain Participant Record** function) can be accessed from *outside* of the system. You can use this feature to create a link from your library's Home Page, ILL Help page, or other Web location to display Participant Information and ILL Policies for *any library* within your consortium.

Only that information that has been configured for "patron display" in the associated Participant Record will be shown when Participant Information is accessed from outside of the system.

To create a link to Participant Information:

Add an "anchor" **<a>** tag on the desired Web page for each library for which you wish to make Participant Information available. The format and content of the tag is as follows:

<a target=***TargetName*** href="

AGentBaseURL/agent/ShowILLPartIDB.asp?lid=***LibCode***&cid=***CustCode***"**>**

Link Text

Where:

- target=***TargetName*** opens an *additional* browser window in which the associated Participant Information will be displayed. You may use *any name* as the ***TargetName*** (*do not* include spaces in the ***TargetName***).
- ***AGentBaseURL*** is the base URL for your SHAREit system
- ***LibCode*** is the library code assigned by Auto-Graphics for the associated library
- ***CustCode*** is the customer code assigned by Auto-Graphics for your consortium
- ***Link Text*** is the text you wish to be used as the hyperlink to the associated Participant Information (such as the name of the associated library)

Chapter 7. SYSTEM ADMINISTRATION

Overview

System Administration functions let you, as a System Administrator, configure the ILL Request Forms and set system-wide defaults that apply to *all* participant libraries in the system.

Each consortium will typically have only *one* System Administrator who will have access to *all* available system administration features. However, other authorized users (Library Administrators or other staff) *may* be granted access to certain System Administration features by the assignment of appropriate permissions in their user record. System Administration functions are included in the **ILL Admin** tab.

This chapter provides the procedures to:

- Configure the ILL request "Loan" and "Copy" forms
- Establish system-wide defaults for *all* participant libraries in the consortium.

Configuring ILL Request Forms

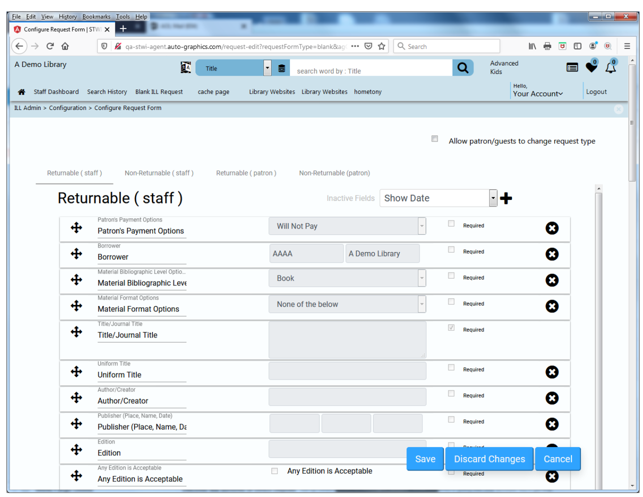
When accessing ILL Administration as a Customer SuperUser, the **Configure Request Forms** function lets you establish the *default* ILL Request Form and Blank Request Form content and arrangement for **Returnable (staff)**, **Non-Returnable (staff)**, **Returnable (patron)** and **Non-Returnable (patron)** requests.

Customer SuperUsers establish the "default" request forms for all libraries within a consortium. Library SuperUsers may modify the "default" forms (with limitations) to suit local needs. When accessing the **Configure Request Forms** function as a Library SuperUser, fields and options that are not editable at the library level are "grayed out."

Configuration of the "loan" and "copy" forms for staff and for patrons is accomplished in a similar manner.

- From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Configure Request Forms**.
  - The Configure Request Forms screen displays.
- Use the **Allow patron/guests to change request type** radio button to establish whether or not library guests/patrons can change the request type once the request form has been displayed.

  *When **Request this Item** is selected from a Brief Browse List or Full Record Display, the system determines the appropriate request type, **Returnable (loan)** or **Non-Returnable (copy)**, based on the item being requested, and displays the associated request form. By default, the request type for the Blank Request Form is **Returnable (loan)**.*



Configure Request Forms Screen

  - A *checkmark* indicates that guests/patrons *can* change the request type.
  - An *empty checkbox* indicates that guests/patrons *cannot* change the request type.

- Clicking the checkbox repeatedly will toggle it on and off.

- Click the tab for the request form you wish to configure; **Returnable (staff)**, **Non-Returnable (staff)**, **Returnable (patron)** or **Non-Returnable (patron)**.

- The Configure Request Forms screen lists *all* fields currently included in the respective ILL request form in the order in which they appear on the form, and provides the following information for each field:

  *Fields that are currently inactive (not included in the form) are listed in the **Inactive Fields** menu.*

  - The *default* name of the data field. Local labels may be applied to certain fields.
  - An illustration of how the field will appear on the form (as a text box, drop-down menu, etc.).
  - Checkboxes that allow “optional” fields included in the form to be configured as “required” fields.

To configure ILL Request Forms:

- From the Configure Request Forms screen, you may choose to:
  - Set the display sequence for form fields (see ***Setting the Display Sequence*** on page **137** for details)
  - Add “optional” fields to the form (see ***Configuring “Optional” Fields*** on page **138** for details)
  - Assign a local label to selected fields (see ***Assigning Local Labels*** on page **138** for details)
  - Configure selected fields as “required” (see ***Designating “Mandatory” Fields*** on page **138** for details)

ILL Request Form Fields

Form Field	Description / Comments	Used On	
		Loan	**Copy**
Any Edition is Acceptable	Checkbox; default state established in Participant Record.	P/S/A	
Article Author	Text box.		P/S/A
Article Date	Text box / drop-down menus. **Year** element is required; **Month / Season** and **Day** elements are optional.		P/S/A
Article Information (Volume, Issue, Pages)	Text boxes. **Pages** element is required; **Volume** and **Issue** elements are optional.		P/S/A
Article Title	Text box.		P/S/A
Author/Creator	Populated from bibliographic record (MARC Tag 1xx) if present; text box on Blank Request Form.	P/S/A	P/S/A
Borrower	Read-only field / drop-down menu; populated from Participant Record. For systems employing Network Lender functionality, this field includes a drop-down menu for selection of the appropriate borrowing library.	P/S/A	P/S/A
Borrower’s Email	Hyperlink; populated from Participant Record, as available. Shown on Lender’s view only.	A	A
Borrower’s Notes	Text box (Borrower); read-only field (Lender).	P/S/A	P/S/A
Borrower's Phone	Text box; pre-filled by the system with the **ILL Phone Number: General** from Participant Record, as available.	A	A
Call Number and Location	Text box (Lender); read only field (Borrower)	A	A
Charges	Text box (Lender); read-only field (Borrower)	A	A

Form Field	Description / Comments	Used On	
		Loan	Copy
Copyright Compliance	For U.S. requests only; read-only field. Displays **ccg/ccl** as appropriate. Displayed to lender once request has been assigned a request number; displayed to borrower in **Shipped** and subsequent statuses.		A
Copyright Compliance Options	For U.S. requests only; drop down menu for Borrower selection of Copyright Compliance, **ccg/ccl** as appropriate.		A
Create a Password	For patron Request Forms only; text box. Pre-filled by system for authenticated patrons with password taken from User Record.	P	P
Current Lender's Note	Text box (Lender); read-only field (Borrower)	A	A
Customer Field 1	Text box; for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Field 2	Text box; for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Field 3	Text box; for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Field 4	Text box; for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Field 5	Text box; for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Field 6 (checkbox)	Checkbox, for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Help	Hyperlink to URL specified in **ILL Help Page** field on Participant Record.	P/S	P/S
Date Checked In	Text box (Lender); read-only field (Borrower). Pre-filled by system with current calendar date, editable by Lender using calendar function.	A	
Date Received	Text box (Borrower); read-only field (Lender). Pre-filled by system with current calendar date, editable by Borrower using calendar function.	A	A
Date Renewal Requested	Text box (Borrower); read-only field (Lender).	A	
Date Returned	Text box (Borrower; read-only field (Lender). Pre-filled by system with current calendar date, editable by Borrower using calendar function.	A	
Date Shipped	Text box (Lender); read-only field (Borrower). Pre-filled by system with current calendar date, editable by Lender.	A	A
Document URL	Text box (Lender); hyperlink (Borrower). Displayed to Lender in **Pending** and **Will Supply** statuses; displayed to Borrower in **Shipped** status.	A	
Due Date	Text box (Lender); read-only field (Borrower). Pre-filled by system based on Lender's **Days to Return**; editable by Lender using calendar function. Also used for **Renewed to Date**.	A	
Edition	Populated from bibliographic record (MARC Tag 250) if present; text box on Blank Request Form.	P/S/A	P/S/A
For Patron: Why Request was not Filled	Text box. Content available to patron through ILL Request Tracking.	A	A
History Information	Read-only field; system supplied.	A	A
Insured For	Text box (Lender); read-only field (Borrower).	A	A

Form Field	Description / Comments	Used On	
		Loan	Copy
ISBN	Populated from bibliographic record (MARC Tag 020) if present; text box on Blank Request Form. Up to three entries supported.	P/S/A	P/S/A
ISSN	Populated from bibliographic record (MARC Tag 022) if present; text box on Blank Request Form. Up to three entries supported.	P/S/A	P/S/A
Item Barcode (Borrower)	Text box (Borrower). Pre-filled with ILL Request Number.	A	
Item Barcode (Lender)	Text box (Lender); read-only field (Borrower).	A	
Lender	System supplied. Shows Lender Code and Lender Name.	A	A
Lender List	Text box (Borrower); read-only field (Lender). Displays all future Lender's to Borrower, next five Lenders to Lender. Not included on initial staff form for systems using SSS.	S/A	S/A
Lender's Email	Hyperlink; populated from Participant Record, as available. Shown on Borrower's view only.	A	A
Lender's Fax	Read-only field. Populated from Participant Record, as available. Shown on Borrower's view only.	A	A
Lenders' Notes	Text box (Lender); read-only field (Borrower).	A	A
Lender's Phone	Read-only field. Populated from Participant Record, as available.	A	A
Lending Restrictions	Read-only field. Taken from Lender's **Reason/Condition**.	A	
Library of Congress Control Number	Populated from bibliographic record (MARC Tag 020 $a) if present; text box on Blank Request Form.	P/S/A	P/S/A
Locate Lender	Action button. Used in locating Lender's for inclusion in the **Lender List**. Not included for systems using SSS.	A	A
Material Bibliographic Level	Read-only field. Displays value selected from **Material Bibliographic Level Options**.	A	A
Material Bibliographic Level Options	Drop-down menu. Populated from bibliographic record (LDR/06-07)	P/S	P/S
Material Format	Populated from bibliographic record if textual material (LDR/06 for book, serial, mixed material; MARC Tag 008 for books, computer files, maps, music, serials, visual materials, mixed materials).	A	A
Material Format Options	Drop-down menu.	P/S	P/S
Max Cost	Text box. Specified in Borrower's currency.	P/S/A	P/S/A
Need by	Text box. Pre-filled with system-calculated default date. Editable by patron/staff using calendar function.	P/S/A	P/S/A
Number of Copies Needed (over 1 creates multiple requests)	Text box. *This field is applicable to **Returnable (loan)** requests only. This field is not shown on the Blank Request Form (see **Using the Blank Request Form** on page **22** for details).*	S/A	
Number of Pieces/Pages Shipped	Text box (Lender); read-only field (Borrower).	A	A
OCLC Number	Populated from bibliographic record (MARC Tag 035) if present, text box on Blank Request Form.	P/S/A	P/S/A
Other Standard Identifier	Populated from bibliographic record (MARC Tag 024, $a, first indicator = 1.	P/S/A	P/S/A

Form Field	Description / Comments	Used On	
		Loan	Copy
Patron Lookup	Action button. Used in patron authenticated systems (employing the User Administration module) to locate the patron for the request.	S	S
Patron's Address 1	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Address 2	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Address 3 (City, State, ZIP)	Text boxes. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Contact 1	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Contact 2	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's First Name	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Last Name	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Library Card Number	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only. Required for Circ-ILL implementations.	P/S/A	P/S/A
Patron's Library Card Number (printed barcode)	Printed barcode. Optional feature may not be enabled for all systems.	A	A
Patron's Middle Name	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Notes	Text box. Participant Record option determines if request with not should move to **Awaiting Approval**. Shown in Borrower's view only.	P/S	P/S
Patron's Payment Method	Read-only field. Displays value selected from **Patron's Payment Options**. Shown in Borrower's view only.	A	A

Form Field	Description / Comments	Used On	
		Loan	Copy
Patron's Payment Options	Drop-down menu. Populated from Participant Record.	P/S	P/S
Patron's Program and Course	Text box. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Status and Year	Text box. Shown in Borrower's view only.	P/S/A	P/S/A
Physical Description	Populated from bibliographic record (MARC Tag 035) if present, text box on Blank Request Form.	P/S/A	P/S/A
Pickup Location	Read-only field. Displays value selected from **Pickup Location Options**. Shown in Borrower's view only.	A	A
Pickup Location Options	Drop-down menu. Populated from Participant Record. Shown in Borrower's view only.	P/S	P/S
Publisher (Place, Name, Date)	Populated from bibliographic record (MARC Tag 260 or 264) if present, text boxes on Blank Request Form.	P/S/A	P/S/A
Publisher Number	Populated from bibliographic record (MARC Tag 028 $a) if present.	P/S/A	P/S/A
Publisher Source	Populated from bibliographic record (MARC Tag 028 $b) if present.	P/S/A	P/S/A
Reason Condition/Options	Drop-down menu. Shown in Lender's view only.	A	A
Request Date	Read-only field. Shows current calendar date.	A	A
Request Number	Read-only field. System supplied.	A	A
Request Number (printed barcode)	Printed Barcode. Optional feature may not be enabled for all systems.	A	A
Request Type	Read-only field. Displays request type selected (default selection is determined by material type of item being requested. Shown in Borrower's view only.	A	A
Respond By Date	Read-only field. Populated from current "deadline date." Shown in Lender's view only.	A	A
Return To Address 1	Text box (Lender); read-only field (Borrower). Populated from Lender's Participant Record. Editable by Lender.	A	
Return To Address 2	Text box (Lender); read-only field (Borrower). Populated from Lender's Participant Record. Editable by Lender.	A	
Return To Address 3 (City, State, ZIP)	Text boxes (Lender); read-only fields (Borrower). Populated from Lender's Participant Record. Editable by Lender.	A	
Return To Country	Text box (Lender); read-only field (Borrower). Populated from Lender's Participant Record. Editable by Lender.	A	
Return To Name	Text box (Lender); read-only field (Borrower). Populated from Lender's Participant Record. Editable by Lender.	A	
Series	Populated from bibliographic record (MARC Tag 440 an$p or 830 av for returnable (loan) requests, MARC Tag 260 or 264 for copy (non-returnable) requests), text box on Blank Request Form.	P/S/A	P/S/A
Ship To Address 1	Text box (Borrower); read-only field (Lender). Populated from Ship To Address in Lender's Participant Record (if no Ship To Address, taken from main Address). Editable by Lender.	A	A
Ship To Address 2	Text box (Borrower); read-only field (Lender). Populated from Ship To Address in Lender's Participant Record (if no Ship To Address, taken from main Address). Editable by Lender.	A	A

Form Field	Description / Comments	Used On	
		Loan	Copy
Ship To Address 3 (City, State, ZIP)	Text box (Borrower); read-only field (Lender). Populated from Ship To Address in Lender's Participant Record (if no Ship To Address, taken from main Address). Editable by Lender.	A	A
Ship To Ariel	Text box (Borrower); read-only field (Lender). Populated from Lender's Participant Record. Editable by Lender.		A
Ship To Country	Text box (Borrower); read-only field (Lender). Populated from Ship To Address in Lender's Participant Record (if no Ship To Address, taken from main Address). Editable by Lender.	A	A
Ship To Email	Text box (Borrower); read-only field (Lender). Populated from Lender's Participant Record. Editable by Lender.		A
Ship To Fax	Text box (Borrower); read-only field (Lender). Populated from Lender's Participant Record. Editable by Lender.		A
Ship To Name	Text box (Borrower); read-only field (Lender). Populated from Lender's Participant Record. Editable by Lender.	A	A
Shipped Via	Read-only field. Displays value selected from **Shipped Via Options**. Shown in Borrower's view only.	A	A
Shipped Via Options	Drop-down menu. Shown in Lender's view only.	A	A
Shipper's Tracking Number	Text box (Lender); read-only field (Borrower).	A	A
Show Date	Editable by /staff using calendar function.	P/S/A	
Source of Article Citation	Text box (Borrower); read-only field (Lender).		P/S/A
Status	Read only field. Displays value selected from **Status Options**. Shown in Borrower's and Lender's view, depending on current status.	A	A
Status Options	Drop-down menu. Shown in Borrower's and Lender's view, depending on current status.	A	A
This Format Only	Checkbox (Borrower); Read-only field (Lender).	P/S/A	
Title/Journal Title	Populated from bibliographic record (MARC Tag 245 $a $b $h $n $p) if present; text box on Blank Request Form.	P/S/A	P/S/A
Uniform Title	Populated from bibliographic record (MARC Tag 130) if present; text box on Blank Request Form.	P/S/A	P/S/A
Verification	Hyperlink (for records from AG databases), includes resource name and AGCN; read-only field (for records from Z39.50 targets, includes text "Created from Z39.50 record (*MARC Tag 001 value*): (*library name*)."	P/S/A	P/S/A
Volumes Needed	Text box.	P/S/A	

Setting the Display Sequence

You can define the order in which fields (elements) are listed on the request form.

To set the display sequence for ILL Request Forms:

- Position the cursor on the icon for the field you wish to move.
- *Click and hold* the left mouse button, then *drag* the field to the desired position in the list.
- Repeat as necessary to reposition additional fields.

- When all desired changes have been made, click the **Save** button to save your changes. (Click the **Discard Changes** button to discard your changes and reset the form to its previous condition. Click the **Cancel** button to discard your changes and close the Configure Request Forms screen.)

Configuring "Optional" Fields

The ILL request forms can include a combination of "system required" and "optional" fields (elements). "Optional" elements are indicated by a ⊗ icon in the right margin of the field. These elements may be selectively included in or excluded from the request form.

To *add* an optional field to the form:

- Select the "optional" field you wish to add to the form in the **Inactive Fields** menu.
- Click the ➕ icon to add the selected field to the form.
  - The field is added as the *first entry* in the form.
- Set the display sequence for the added field as desired (see ***Setting the Display Sequence*** on page **137** for details)
- When all desired changes have been made, click the **Save** button to save your changes. (Click the **Discard Changes** button to discard your changes and reset the form to its previous condition. Click the **Cancel** button to discard your changes and close the Configure Request Forms screen.)

To *remove* an optional field from the form:

- Click the ➕ icon to add the selected field to the form.
  - The field is removed from the form and returned to the **Inactive Fields** menu.

Assigning Local Labels

You can assign *local labels* to certain form fields (elements). A text area is included for each field into which you may assign a local label.

To assign local labels:

- Enter the desired local label in the text area.
  - The local label cannot exceed 30 characters, *including spaces*.
- When local labels have been entered for all desired fields, click the **Save** button to save your changes. (Click the **Discard Changes** button to discard your changes and reset the form to its previous condition. Click the **Cancel** button to discard your changes and close the Configure Request Forms screen.)

  If a currently selected element for which you have entered a local label is subsequently de-selected, the local label will be retained.

Designating "Mandatory" Fields

The ILL Request Form and Blank Request Form can contain a combination of *required* and *optional* data fields (elements).

- "System required" mandatory elements *do not* include a ⊗ icon (cannot be removed to the **Inactive Fields** menu) and include a *static checkmark* ☑ in the **Required** field. These fields are *always* included in the request form and are *always* required.
- "System required" elements that *are not* mandatory *do not* include a ⊗ icon (cannot be removed to the **Inactive Fields** menu) and include a *static checkbox* ☐ in the **Required** field. These fields are *always* included in the request form and are *never* required.

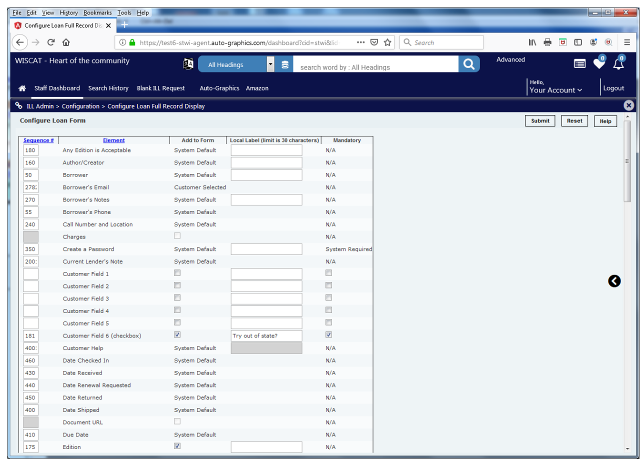
- Elements that you may *optionally* designate as “required” are indicated by a icon in the right margin of the field and an *active checkbox* in the **Required** field.

To designate “required” fields:

- Use the **Required** checkboxes to designate a field as “mandatory.”
  - A *checkmark* indicates the field *is* mandatory.
  - An *empty checkbox* indicates the field *is not* mandatory.
  - Clicking a checkbox repeatedly will toggle it on and off.
- When all desired “mandatory” fields have been configured as desired, click the **Save** button to save your changes. (Click the **Discard Changes** button to discard your changes and reset the form to its previous condition. Click the **Cancel** button to discard your changes and close the Configure Request Forms screen.)

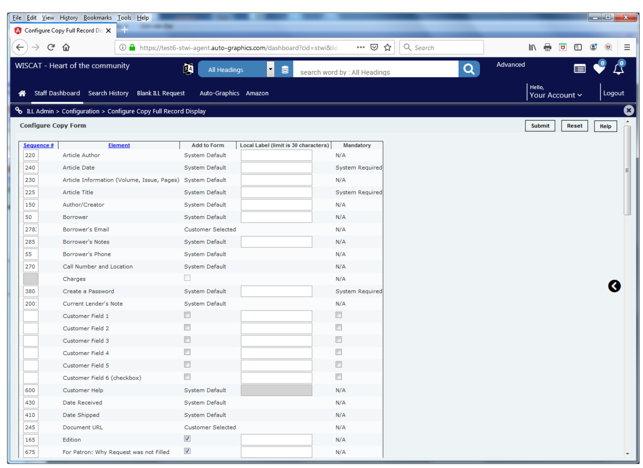
Configuring ILL Request Full Record Displays

When accessing ILL Administration as a Customer SuperUser, the **Configure Loan Full Record Display** and **Configure Copy Full Record Display** functions let you establish the *default* content and arrangement for **Returnable** (loan) and **Non-Returnable** (copy) request Full Record Displays.



Configure Loan Full Record Display Screen

Customer SuperUsers establish the “default” Full Record Displays for *all libraries* within a consortium. Library SuperUsers may modify the “default” forms (with limitations) to suit local needs. Even if a Library SuperUser has already made local changes to their settings, a Customer SuperUser may still force a field be active locally. When accessing the **Configure Loan Full Record Display** or **Configure Copy Full Record Display function** as a Library SuperUser, fields and options that have not been enabled by a Customer SuperUser are “grayed out" at the library level.



Configure Copy Full Record Display Screen

Configuration of the “loan” Full Record Display and “copy” Full Record Display is accomplished in a similar manner.

- From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Configure Loan Full Record Display** or **Configure Copy Full Record Display**, as desired.
  - The Configure Loan Form or Configure Copy Form screen displays, as appropriate.
- The Configure Loan Form and Configure Copy Form screens list *all* fields that may be included in the respective ILL request Full Record Displays, and provide the following information for each field:
  - **Sequence #** – specifies the order in which the field is shown on the Full Record Display.
  - **Element** – the *default* name of the data field. Local labels may be applied to certain fields.

- **Add to Form** – allows "optional" data fields to be included in or excluded from the Full Record Display; "system required" data fields (identified by the notation "System Default") are *always* included in the form. "Optional" fields configured by the Customer SuperUser for your consortium or collective are identified by the notation "Customer Selected."
- **Local Label (limit is 30 characters)** – Allows a local label to be applied to certain fields.
- **Mandatory** – allows "optional" fields included in the form to be configured as "mandatory."

- Click the **Sequence #** link to sort the screen numerically by sequence number for the associated form. Click the **Element** link to sort the screen alphabetically by element name.
- From the Configure Loan Form or Configure Copy Form screen, you may choose to:
  - Set the display sequence for form fields (see ***Setting the Display Sequence*** on page **140** for details)
  - Add "optional" fields to the form (see ***Configuring "Optional" Fields*** on page **140** for details)
  - Assign a local label to selected fields (see ***Assigning Local Labels*** on page **141** for details)
  - Configure selected fields as "mandatory" (see ***Designating "Mandatory" Fields*** on page **141** for details)

Setting the Display Sequence

You can define the order in which fields (elements) are listed on the Full Record Display.

To set the display sequence for the Full Record Display:

- Use the **Sequence #** text boxes to enter the desired display sequence for each element.
  - You can enter any number from "**0**" to "**9999**" as a display sequence number.
  - You *must* enter a *unique* display sequence number for *each* element.

    *If the same display sequence number is used for more than one element, the message "Duplicate value" displays at the top of the screen and next to the duplicate **Sequence #**s when you submit your changes.*

  - You can enter display sequence numbers in *numeric order* (1, 2, 3, etc.), or, you can *skip numbers* (10, 20, 30, etc.) to allow for easier re-sequencing of elements.
- When display sequence numbers have been entered for *all* elements included in the form, click the **Submit** button to save your changes.

  You must *enter a display sequence number for* all *included elements. If you* do not *enter a display sequence number for a given included element, the message "Missing sequence #" displays at the top of the screen and next to the missing **Sequence #**s when you submit your changes.*

Configuring "Optional" Fields

The ILL request Full Record Displays can include a combination of "system required" and "optional" fields (elements). "System required" elements are indicated by the notation "System Default" in the **Add to Form** column. These elements *cannot* be excluded from the form. "Optional" elements are indicated by a checkbox in the **Add to Form** column. These elements may be selectively included in or excluded from the request form.

To configure "optional" fields for the Full Record Display:

- Use the **Add to Form** checkboxes to *include* an "optional" element in the form or *exclude* an optional element from the Full Record Display.
  - A *checkmark* ☑ indicates the field will be *included* in the Full Record Display.
  - An *empty checkbox* ☐ indicates the field will be *excluded* from the Full Record Display.

- Clicking a checkbox repeatedly will toggle it on and off.

- When all “optional” fields have been configured as desired, click the **Submit** button to save your changes.

  *If you de-select a previously selected “optional” element, the **Sequence #** for the element is deleted automatically.*

Assigning Local Labels

You can assign *local labels* to certain Full Record Display fields (elements). The **Local Label (limit is 30 characters)** column includes a text box for each element to which you may assign a local label.

To assign local labels:

- Enter the desired local label in the **Local Label (limit is 30 characters)** text box.
  - The local label cannot exceed 30 characters, *including spaces*.
- When local labels have been entered for all desired elements, click the **Submit** button to save your changes.

  If a currently selected element for which you have entered a local label is subsequently de-selected, the local label will be retained.

Designating “Mandatory” Fields

ILL request Full Record Displays can contain a combination of *required* and *optional* data fields (elements). “System required” mandatory elements are indicated by the notation “System Required” in the **Mandatory** column. These fields are *always* included in Full Record Displays and are *always* mandatory. “System required” elements that *are not* mandatory are identified by the notation “N/A” in the **Mandatory** column. These fields are *always* included in the request form and are *never* mandatory. Elements that you may *optionally* designate as mandatory are indicated by a checkbox in the **Mandatory** column.

To designate “mandatory” fields:

- Use the **Mandatory** checkboxes to designate a field as “mandatory.”
  - A *checkmark* ☑ indicates the field *is* mandatory.
  - An *empty checkbox* ☐ indicates the field *is not* mandatory.
  - Clicking a checkbox repeatedly will toggle it on and off.
- When all desired “mandatory” fields have been configured as desired, click the **Submit** button to save your changes.

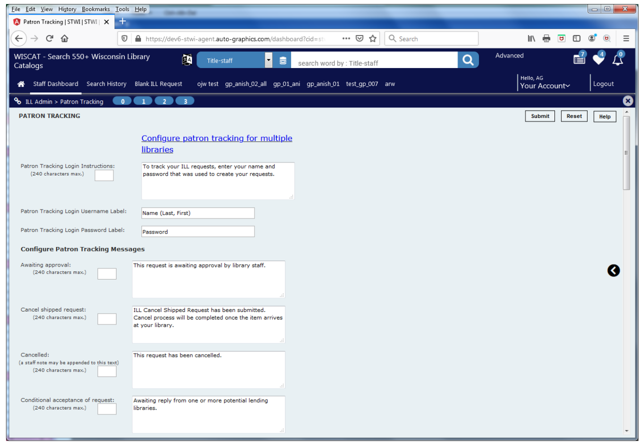
Configuring Patron Request Tracking Text

The **Patron Tracking** function lets you configure labels and message content for the Patron Request Tracking feature available to library patrons and guests through the Search module. The **Patron Tracking** function is available to Library SuperUsers, Regional SuperUsers and Customer SuperUsers:

- **Library SuperUsers** – can configure content of the Patron Request Tracking feature for their library only
- **Regional SuperUsers** – can configure content of the Patron Request Tracking feature for any library with which they are associated
- **Customer SuperUser** – can configure content of the Patron Request Tracking feature for any library throughout the system

To configure Patron Request Tracking:

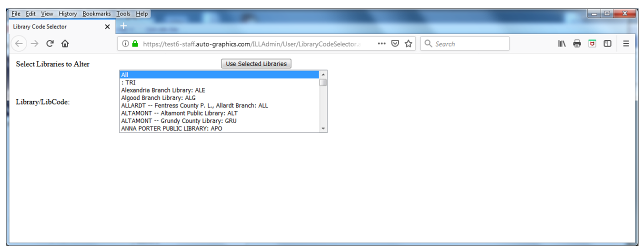
1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Patron Tracking**.
   - The Patron Tracking screen displays.
   - The Patron Tracking screen contains text boxes for instructional text and field labels for the Patron Tracking Login screen, and for messages shown to patrons based on the current status of their ILL requests. The text boxes are pre-filled with the system-supplied default text.



Patron Tracking Screen

2. To configure Patron Request Tracking for *multiple* libraries:
   - Click the Configure patron tracking for multiple libraries link.
     - The Library Code Selector screen displays in an *additional* browser window.
   - Select the libraries for which you wish to configure Patron Request Tracking from the **Library/LibCode** menu.

     *The **Library/LibCode** menu contains a list of all libraries in your consortium or collective, in alphabetic order, by library name.*



Library Code Selector Screen

     - Using the *left* mouse button, click the name of the library for which you wish to configure Patron Request Tracking.
     - To select *multiple* libraries, *press and hold* the **<Ctrl>** key, and click the name of each library for which you wish to configure Patron Request Tracking. When all desired libraries have been selected, release the **<Ctrl>** key.
     - To select several contiguous libraries from the list, *click and hold* the *left* mouse button, then drag through the list to select the desired libraries.
3. When all desired libraries have been selected, click the **Use Selected Libraries** button.
   - The Library Code Selector screen closes *automatically*. All changes made to Patron Request Tracking will be applied to the selected libraries.
4. Enter or edit instructional text shown to the patron on the Patron Request Tracking Login screen in the **Patron Tracking Login Instructions** text box.

   *The **Patron Tracking Login Instructions** text can be a maximum of 240 characters,* including spaces.
5. Enter or edit the labels for the patron username and barcode in the **Patron Tracking Login Username Label** and **Patron Tracking Login Password Label** text boxes.
6. Enter or edit the message to be shown to patrons based on the status of their ILL requests in the **Configure Patron Tracking Messages** text boxes. You can enter message text for the following statuses:

   Patron Tracking Message text for each status can be a maximum of 240 characters, including spaces.

- Awaiting approval
- Cancel shipped request
- Cancelled
- Conditional acceptance of request
- Hold placed in local catalog
- In process
- Need-by date has passed
- Not received
- Overdue
- Passed to local catalog
- Patron cancel denied
- Patron renewal denied
- Patron requested cancellation
- Patron requested renewal
- Pending
- Recalled
- Received (non-returnable)
- Received
- Renewal denied
- Renewal granted
- Renewal requested
- Retry
- Shipped
- Staff cancellation pending
- Unfilled
-

7. When all desired text has been entered, click the **Submit** button to save your changes. (To discard your changes and retain prior content, click the **Reset** button.)
   - The message "Patron tracking update successfully completed." displays at the top of the screen.

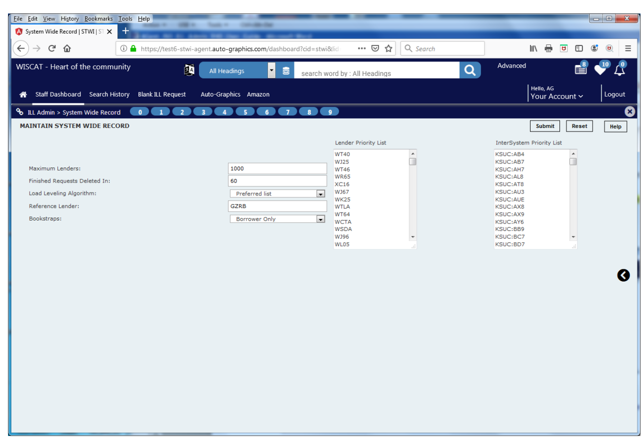
Viewing and Editing the System Wide Record

The Maintain System Wide Record screen lets selected staff members set the defaults for maximum lenders, finished requests deleted in, load leveling algorithm, reference lender, Lender Priority List, and the *optional* bookstraps feature. These defaults apply to *all* participant institutions in your consortium.

The System Wide Record function is available only to ILL staff members granted the Change Any Library permission (see the ***RESEARCHit/SHAREit User Administration User Guide*** *or* ***VERSO User Administration User Guide*** *for details).*

To set the system wide defaults:

1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **System Wide Record**.
   - The Maintain System Wide Record screen displays.
2. Enter the maximum number of lenders to which a given ILL request may be sent in the **Maximum Lenders** text box.
   - The maximum number of lenders *should not* be greater than 250.



Maintain System Wide Record Screen

3. Enter the number of calendar days you wish to keep finished requests in the system before being automatically deleted by the system in the **Finished Requests Deleted In** text box.

   A finished request is defined as a "borrow" request that the lender has checked in, or a "copy" request that has been updated to ***Received*** *by the borrower.*

4. Select the desired option for ILL load leveling from the **Load Leveling Algorithm** menu:

   Load leveling aids in ensuring an equitable distribution of ILL requests between two trading partners or among all trading partners in the consortium.

   - **Preferred list:** ILL requests are submitted to lenders holding the title in the order specified in the **Preferred Lender List** on the Participant Record and the **Lender Priority List** in the System Wide Record, if used, for the borrower.
   - **Rotated list:** ILL requests are submitted to lenders holding the title in a "rotating" order based on the **Preferred Lender List** on the Participant Record and the **Lender Priority List** in the System Wide Record, if used, for the borrower. The system "rotates" the libraries in the **Preferred Lender List** and the **Lender Priority List** by one each time an ILL request is submitted.
   - **Random:** ILL requests are submitted to lenders holding the title in random order.
   - **Current Pending** – This option focuses on balancing current **Pending** requests with available staffing levels. Lenders will indicate how many current **Pending** requests they are able to process, and the system will send the library new lending requests if they have fewer requests than they indicate they are willing to accept. The default is 100 requests, but each library has the ability to change that value.
   - **Current Pending/Will Supply** – This option is a variation on the **Current Pending** option as it counts the requests in the **Pending** and **Will Supply/In Process** statuses. The default is 100 requests, but each library has the ability to change that value.
   - **Total Lending** – Based on a **Date Range** specified, this option will direct requests to the library that has filled fewer requests than other libraries that own the requested title during the specified time period. If two libraries own the title and have it available, this option will send the request to the library that has filled fewer requests in the selected time period.

     *Preferred list is the default selection for the **Load Leveling Algorithm**.*

   - **Random Hierarchy** – The Lender List is built using lenders holding the title from the **Preferred Lender List** on the Participant Record in a random order; and then adding lenders from the **Lender Priority List** in the **System Wide Record** in a random order.

     *In cases where a **Preferred Lender List** has not been specified in the borrower's Participant Record, the Lender List is built only using lenders from the **Lender Priority List** in the **System Wide Record** in a random order.*

   - **Preferred Hierarchy** – The Lender List is built using lenders holding the title from the **Preferred Lender List** on the Participant Record in the order specified in the list; and then adding lenders from the **Lender Priority List** in the **System Wide Record** in a random order.

     *In cases where a **Preferred Lender List** has not been specified in the borrower's Participant Record, the Lender List is built only using lenders from the **Lender Priority List** in the **System Wide Record** in a random order.*

5. If **Total Lending** is selected from the **Load Leveling Algorithm** menu, select the desired date range to be used by the option from the **Date Range** menu; **Previous Week**, **Previous Month**, **Previous Quarter**, **Previous Year** or **Cumulative**.

   *The **Date Range** menu is available* only *when **Total Lending** is selected from the **Load Leveling Algorithm** menu.*

6. Enter the Library Code for the lender to whom you wish to submit Reference Requests in the **Reference Lender** text box.

   - When you select **Reference Request** from the **Request Type** menu on the Blank Request Form, the **Reference Lender** is entered in the ILL **Lender List** *automatically*.

7. If your library has enabled the *optional* bookstraps feature, select the type(s) of bookstraps you wish to be included on the Bookstraps screen from the **Bookstraps** menu.

- You may select to include bookstraps for items processed by your library as **Borrower and Lender**, or as a **Borrower Only**.

  *Bookstraps are an optional feature, and may not be enabled for all systems. For libraries that have not enabled Bookstraps functionality, the **Bookstraps** menu is not shown on the System Wide Record.*

8. If desired and if you have the permissions, you can make additions, deletions or updates to libraries in the **Lender Priority List** and/or **InterSystem Priority List** (see ***Editing the Lender Priority List*** on page **147** for details).

9. Click the **Submit** button to save changes to the System Wide Record. (Click the **Reset** button *before updating* to leave the System Wide Record unchanged.)

   - The screen refreshes and displays the message “The system wide record has been successfully updated.”

Understanding Load Leveling Algorithms

The **Load Leveling Algorithm** menu offers eight options for distributing ILL requests among trading partners. Only *one option* can be active at any given time.

The **Load Leveling Algorithm** is applied when an ILL request is submitted and the ILL **Lender List** is built. In the event that a *new* algorithm is selected while ILL requests are still in process, those requests will continue to use the *original* algorithm.

The eight Load Leveling Algorithm options are:

- **Preferred List**: This option permits a library to send requests to one or more libraries they consider their “favorite lenders.” ILL requests are submitted to lenders holding the title (who are also willing to lend the format and have the title available to lend) in the order specified in the **Preferred Lender List** in the borrowing library’s Participant Record and in the **Lender Priority List** in the System Wide Record, if applicable. If there are libraries present in *both* the **Preferred Lender List** *and* the **Lender Priority List**, the lists are merged and the second occurrence of the Library Codes are removed.

- **Rotated List**: This option distributes workflow evenly among the libraries in the **Preferred Lender List**. ILL requests are submitted to lenders holding the title in a “rotating” order based on the **Preferred Lender List** in the borrowing library’s Participant Record. The system “rotates” the libraries in the **Preferred Lender List** (and **Lender Priority List**, if applicable) by one each time an ILL request is submitted.

  EXAMPLE: If the **Preferred Lender List** includes libraries AAAA, BBBB, CCCC, and DDDD, and all four libraries own the items being requested (and lend the format and have it available to loan), the first request will be sent first to AAAA; the second request sent first to BBBB; the third request sent first to CCCC; and the fourth request sent first to DDDD. Requests will be sent to *all* lenders in the **Preferred Lender List** and **Lender Priority List**, if required and applicable.

- **Random**: This option distributes requests in no specified pattern, thus distributing workload unpredictably among lenders. ILL requests are submitted to lenders on the **Preferred Lender List** and **Lender Priority List**, if applicable, in a random order.

- **Current Pending**: This option is designed to balance lending workload and staffing levels. Each library may set the number of current pending requests they are willing to accept in the **Maximum Pending Queue Size** field of their Participant Record. The default value for this field is 100. The system counts the number of **Pending** requests for the lender, and subtracts this number from the value specified in the **Maximum Pending Queue Size** field to determine how many requests to send to the library (their “Q room value”). Each time a request is created, the ILL lender list is sorted based on the number of requests a lender is able to accept, from greatest to least. All lenders in the **Preferred Lender List** and **Lender Priority List** that own the item are added to the ILL lender list, including libraries with a *negative* “Q room value” (libraries that have more pending requests than they have indicated they are able to process). As a result, a lender *may* receive new requests that exceed the number they are able to process, but only after all lenders with a *positive* “Q room value” have been exhausted. If two libraries have the same “Q room value,” the **Preferred Lender List** determines the order in which the libraries are included in the ILL lender list.

*The **Maximum Pending Queue Size** field is shown in the Participant Record* only *when the **Load Leveling Algorithm** is set to **Current Pending** or **Current Pending/In-Process**.*

- **Current Pending/In-Process**: This option is designed to balance lending workload and staffing levels. This option is used by libraries that move lending requests to the **Will Supply/In Process** status while they are working on them. The system adds the number of requests in the **Pending** and **Will Supply/In Process** status categories, then subtracts this total from the value specified in the **Maximum Pending Queue Size** field to determine how many requests the library is able to receive. The remaining process is the same as described for the **Current Pending** algorithm.

  *The **Maximum Pending Queue Size** field is shown in the Participant Record* only *when the **Load Leveling Algorithm** is set to **Current Pending** or **Current Pending/In-Process**.*

- **Total Lending**: This option is designed to direct requests to libraries that filled fewer requests than other libraries in the consortium during a time period selected from the **Date Range** menu in the System Wide Record. The number of filled lending requests includes “returnable” and “non-returnable” requests, but excludes reference requests. The system considers a request to be filled when the lender updates the status of the request to **Shipped**. The *total filled lending value* is the sum of “returnables” and “non-returnables” taken from the “Requests Filled” field of the Lender Statistics for the time period selected. The following time periods are available through the **Date Range** menu:
  - **Previous Week** (beginning on Sunday)
  - Previous Month
  - **Previous Quarter** (beginning January 1st, April 1st, July 1st, and October 1st)
  - Previous Year
  - Cumulative

The totals used to determine the order in which libraries are added to the ILL lender list are updated each week, month, quarter, or year for the **Previous Week**, **Previous Month**, **Previous Quarter**, and **Previous Year** time periods, respectively. The default **Date Range** value is **Previous Year**.

If the **Date Range** value is set to **Cumulative**, total lending is counted from the day the option was selected. If the **Date Range** value is changed, the counts start over from the day the change was made, and the totals are recalculated based on the new **Date Range** value. Default lenders *are not* able to override this option.

The ILL lender list is built when the request is submitted. The system locates all libraries that own the item and arrange the lender list inversely, from least to most filled lending for the selected period. If two libraries have filled the same number of lending requests, the **Preferred Lender List** determines the order in which the libraries are added to the ILL lender list. *No libraries* will be skipped when the **Cumulative** option is selected so long as they own the requested item, have it in a format they lend, and have it available to lend.

EXAMPLE: The currently selected **Date Range** value is **Previous Quarter**. Library A filled 540 requests during that quarter; Library B filled 453. Assuming that both libraries own the item, the request will be sent to Library B *first* because it filled fewer requests than Library A. If Library B *cannot* fill the request it will be sent to Library A.

- **Random Hierarchy**: Similar to the **Random** option, this option permits a library to send requests to one or more libraries they consider their “favorite lenders.” The Lender List is built using lenders in the **Preferred Lender List** in the borrowing library’s Participant Record holding the title (who are also willing to lend the format and have the title available to lend) in random order, and then adding lenders from the **Lender Priority List** in the **System Wide Record** in a random order. If there are libraries present in *both* the **Preferred Lender List** *and* the **Lender Priority List**, the lists are merged and the second occurrence of the Library Codes are removed. In cases where a **Preferred Lender List** has not been specified in the borrower’s Participant Record, the Lender List is built only using lenders from the **Lender Priority List** in the **System Wide Record** in a random order.
- **Preferred Hierarchy**: Similar to the **Preferred List** option, this option permits a library to send requests to one or more libraries they consider their “favorite lenders.” The Lender List is built using lenders holding the title (who are also willing to lend the format and have the title available to lend) in the order

specified in the **Preferred Lender List** in the borrowing library's Participant Record, and then adding lenders from the **Lender Priority List** in the **System Wide Record** in a random order. If there are libraries present in *both* the **Preferred Lender List** *and* the **Lender Priority List**, the lists are merged and the second occurrence of the Library Codes are removed. In cases where a **Preferred Lender List** has not been specified in the borrower's Participant Record, the Lender List is built only using lenders from the **Lender Priority List** in the **System Wide Record** in a random order.

Editing the Lender Priority List

The **Lender Priority List** should contain *all* the ILL participant libraries registered as potential lenders for your consortium. If used, libraries should be entered in the list in descending order of preference. Customer SuperUsers can:

- Add a Library Code to the list
- Edit a Library Code in the list
- Delete one or more Library Codes from the list

If you enter an invalid code in the Lender Priority List (a code with a typographical error or a code for a non-ILL participant), the message "The following library codes are not ILL participants and have not been added to the system wide list: (invalid codes list)" displays at the top of the screen when you update the Participant Record, and the invalid codes are removed from the list.

To add a library to the Lender Priority List:

1. On the System Wide Record screen, place the cursor in the **Lender Priority List** at the position you wish to insert the new Library Code.
2. Type the Library Code assigned by Auto-Graphics for the library you wish to add, then press the <Enter> key.
3. Click the **Submit** button to save changes to the System Wide Record. (Click the **Reset** button *before updating* to leave the System Wide Record unchanged.)
   - The screen refreshes and displays the message "The system wide record has been successfully updated."
4. To add additional Library Codes, repeat steps **1** and **2**, above.

   If you enter an invalid *code in the **Lender Priority List**, the invalid code* will not *be saved in the **Lender Priority List** when you submit your changes.*

   - If an added lender is already entered in the **Lender Priority List**, the second occurrence of the lender is removed when you submit your changes.

To edit a library name in the Lender Priority List

1. On the System Wide Record screen, place the cursor within the Library Code you wish to edit.
2. Using the left- and right-arrows, <Backspace> and <Delete> keys, make the desired changes to the Library Code.
3. Click the **Submit** button to save changes to the System Wide Record. (Click the **Reset** button *before updating* to leave the System Wide Record unchanged.)
   - The screen refreshes and displays the message "The system wide record has been successfully updated."
4. To edit additional libraries, repeat steps **1** and **2**, above.

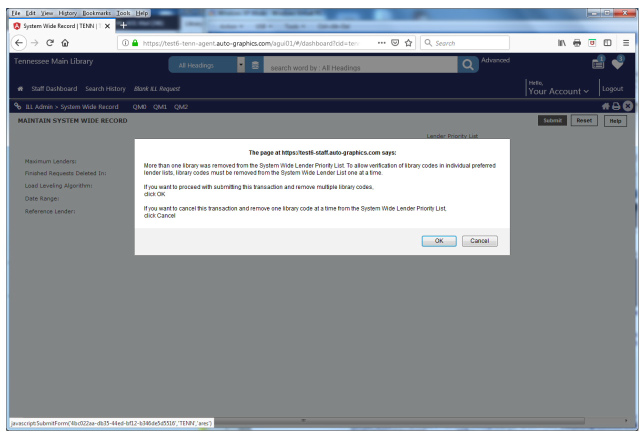
   If you enter an invalid *code in the **Lender Priority List**, the invalid code* will not *be saved in the **Lender Priority List** when you submit your changes.*

   - If an added lender is already entered in the **Lender Priority List**, the second occurrence of the lender is removed when you submit your changes.

To delete *selected* libraries from the Lender Priority List:

*The Maintain System Wide Record screen provides a means for removing deleted libraries from **Preferred Lender Lists** (in Participant Records) throughout the system (see **Removing Deleted Libraries from Preferred Lender Lists** on page **149** for details). To make use of this feature, libraries must be deleted from the **Lender Priority List** one at a time. If you choose delete multiple libraries in a single transaction and wish to remove the deleted libraries from one or more **Preferred Lender Lists**, the Participant Records must be updated manually on a case by case basis.*

1. On the System Wide Record screen, using the *left* mouse button, double-click the name of the library you wish to delete; the selected library will be highlighted.
   - To select several contiguous lenders from the **Lender Priority List**, *double-click and hold* the *left* mouse button, then drag through the list to select the desired lenders.
2. Click the *right* mouse button *on* the selected lenders to display the **Lender Priority List** edit menu.
3. Use the *left* mouse button to select **Delete** from the menu.
4. Click the **Submit** button to save changes to the System Wide Record. (Click the **Reset** button *before updating* to leave the System Wide Record unchanged.)
   - If you selected to delete a *single library* from the **Lender Priority List**, a **Manage removal of (*deleted library code*) from Preferred Lender Lists** link is shown. You can remove the deleted library from one or more **Preferred Lender Lists**, as desired (see ***Removing Deleted Libraries from Preferred Lender Lists*** on page **149** for details).
   - If you selected to delete *multiple libraries* from the **Lender Priority List**, a confirmation dialog displays.
     - To *continue* with the deletion, click the **OK** button.



Delete Multiple Libraries Confirmation Dialog

*If you choose delete multiple libraries in a single transaction and wish to remove the deleted libraries from one or more **Preferred Lender Lists**, the Participant Records must be updated manually on a case by case basis.*

     - To *cancel* the deletion, click the **Cancel** button.

5. To delete additional libraries, repeat steps **1** through **3**, above.

To delete *all* libraries from the Lender Priority List:

*The Maintain System Wide Record screen provides a means for removing deleted libraries from **Preferred Lender Lists** (in Participant Records) throughout the system (see **Removing Deleted Libraries from Preferred Lender Lists** on page **149** for details). To make use of this feature, libraries must be deleted from the **Lender Priority List** one at a time. If you choose delete multiple libraries in a single transaction and wish to remove the deleted libraries from one or more **Preferred Lender Lists**, the Participant Records must be updated manually on a case by case basis.*

1. On the System Wide Record screen, click the *right* mouse button *inside* the **Lender Priority List** to display the **Lender Priority List** edit menu.
2. Use the *left* mouse button to select **Select All** from the menu.

3. Click the *right* mouse button *on* the selected lenders to display the **Lender Priority List** edit menu.

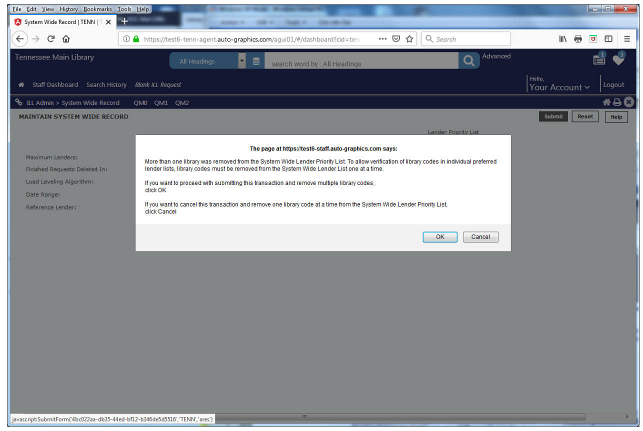
4. Use the *left* mouse button to select **Delete** from the menu.

5. Click the **Submit** button to save changes to the System Wide Record. (Click the **Reset** button *before updating* to leave the System Wide Record unchanged.)

   - A confirmation dialog displays.

   - To *continue* with the deletion, click the **OK** button.

     *If you choose delete multiple libraries in a single transaction and wish to remove the deleted libraries from one or more **Preferred Lender Lists**, the Participant Records must be updated manually on a case by case basis.*



Delete Multiple Libraries Confirmation Dialog

   - To *cancel* the deletion, click the **Cancel** button.

Removing Deleted Libraries from Preferred Lender Lists

When you delete a library from the **Lender Priority List** (see ***Editing the Lender Priority List*** on page **147** for details), a message displays indicating the status of the deleted library in **Preferred Lender Lists** (in Participant Records) throughout the system. In cases where *no* **Preferred Lender List** contains the deleted library, the message “No participant record contains this library code (*deleted library code*).” In cases where *one or more* **Preferred Lender Lists** contain the deleted library, a **Manage removal of (*deleted library code*) from Preferred Lender Lists** link is shown. You can remove the deleted library from one or more **Preferred Lender Lists**, as desired.

To remove a deleted library from Preferred Lender Lists:

1. Click the **Manage removal of (*deleted library code*) from Preferred Lender Lists** link on the Maintain System Wide Record screen.

   - The Select Libraries for Maintenance screen displays in an *additional* browser window.

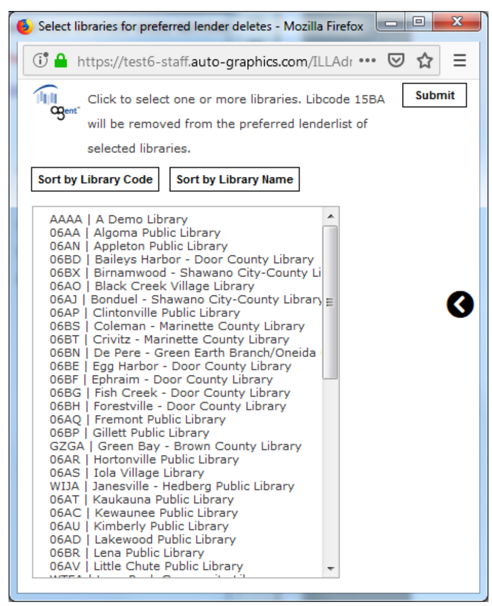
   - The screen shows a list of all libraries for which the deleted library is included in the **Preferred Lender List** in the Participant Record.

   - Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.

   - Click the **Sort by Library Name** button to sort the list alphabetically by **Library Name**.

2. Select the libraries for which you wish to remove the deleted library from the **Preferred Lender List**.

   - To select a *single* library, click the name of the desired library.



Select Libraries for Maintenance Screen

- To select *multiple* libraries, press and hold the **Ctrl** key then click the name of each desired library. When all desired libraries have been selected, release the **Ctrl** key.

3. When all desired libraries have been selected, click the **Submit** button.

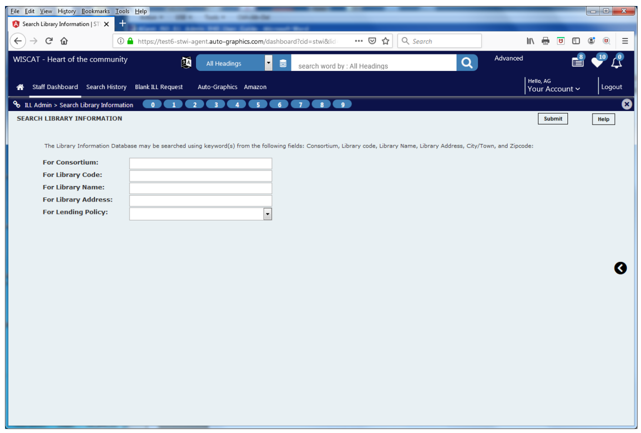
- The Select Libraries for Maintenance screen closes *automatically*, and the message “Libcode (*deleted library code*) has been removed from the Preferred Lender Lists of the selected libraries” displays on the Maintain System Wide Record screen when the deletion is completed.

Searching Library Information

The **Search Library Information** function in the **ILL Admin** menu lets you view the Participant Record for *any* library in your consortium. The Participant Record may include **Lender Information** (library name, address, days requests are processed, etc.), **Contact Information**, **Holiday List**, **ISO** external communications information, **Username** information, **Related** information, **Patron Notices,** and **URL** information. The Participant Record also includes a link to the library’s lending and copying policies, etc.

To search library information:

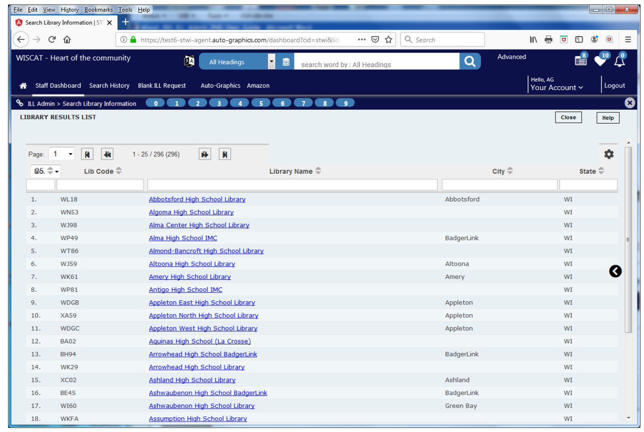
1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Search Library Information**.
   - The Search Library Information screen displays.



Search Library Information Screen

2. Enter your search criteria as desired using *one or more* of the available search options.
   - To search for a library by Consortium code, enter the desired Consortium code in the **For Consortium** text box.
     - You must enter a *complete* Consortium code.
   - To search for a library by Library Code, enter the desired Library Code in the **For Library Code** text box.
     - You must enter a *complete* Library Code.
   - To search for a library by library name, enter the desired library name in the **For Library Name** text box.
     - You may enter a *complete* or *partial* library name. You must enter at least *two characters* in the **For Library Name** text box.
   - To search for a library by location, enter the desired address in the **For Library Address** text box.
     - You may enter a *complete* or *partial* library address. You must enter at least *two characters* in the **For Library Address** text box, including characters from the street, city/town, state, or ZIP Code fields.
   - To search for a library by lending policy for a selected material type, select the desired material type from the **For Lending Policy** menu.
     - The **For Lending Policy** menu lists *all* material types for which *at least one* library in the database has specified a lending policy.
3. When the desired search information has been entered, click the **Submit** button to submit your search.

- If your search is *unsuccessful:* If your search does not return any results, the message "No Match found for this search. Please check your spelling and try again." displays. Click the **Go Back** button to return to the Search Library Information screen to refine your search.
- If your search is *successful*:
  - If your search returns *more than one* library, the Library Results List displays. Click the name of a library in the list to display the Library Information screen for the selected library in an *additional* browser window.

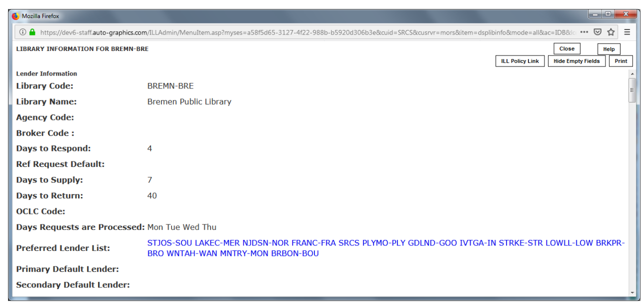


Library Results List

  - If your search returns *one library only*, the Library Information screen for the library displays.

Viewing Library Information

The Library Information screen displays the Participant Record for a selected library. A library's Participant Record contains all the information necessary to ensure the proper handling of interlibrary loan activities with the institution, including a participant profile, interlibrary loan contact information, Preferred Lender List, general lending policies, operating hours, detailed ILL policy information and links to related information.



Library Information Screen

The Library Information screen provides the following information:

- **Lender Information**
  - **Library Code -** Code assigned to the library by Auto-Graphics.
  - **Consortium –** Code assigned by Auto-Graphics to the consortium of which the library is a member
  - **Library Name -** The name of the library.
  - **Agency Code -** MARC Agency code assigned to the library by the Library of Congress.
  - **Broker Code -** Code designating the broker responsible for fulfilling ILL requests for materials owned by the library.
  - **Days to Respond -** Number of business (open) days within which the lender will respond to ILL requests. *The participant library determines this information*.
  - **Ref Request Default -** Library code designating the default lender to whom Reference Requests are submitted.
  - **Days to Supply -** Number of calendar days it typically takes the participant library, as a lender, to send requested material to a borrower. *The participant library determines this information*.
  - **Days to Return -** Number of calendar days (including shipping days) a borrower can check out material before it must be back to the lender. *The participant library determines this information*.
  - **OCLC Code -** Code assigned to the library by OCLC.
  - **Days Requests are Processed -** Days of the week on which the library processes ILL requests.

  - **Preferred Lender List -** A listing of the codes (assigned by Auto-Graphics) for the libraries designated as preferred ILL lenders to the current library.
  - **Primary Default Lender** – The code (assigned by Auto-Graphics) for the library designated as the *primary* default lender for the current library.
  - **Secondary Default Lender** - The code (assigned by Auto-Graphics) for the library designated as the *secondary* default lender for the current library.
  - **System Wide -** A listing of the codes (assigned by Auto-Graphics) for *all* the ILL participant libraries registered as potential lenders for your library or consortium, taken from the System Wide Record.
  - **Blocked Lenders** - A listing of the codes (assigned by Auto-Graphics) for libraries designated as *blocked* lenders for the current library.
  - **Notes -** Additional notes related to library information.
- **Address / Contact Information**
  - **Address 1, Address 2, City, State/Province, Zip/Postal Code, Country** - The street address of the library.
  - **Ship To Name** - The shipping name of the library
  - **Ship to Address 1, Ship To Address 2, Ship To City, Ship To State/Province, Ship To Zip/Postal Code, Ship To Country** - Shipping address of the library.
  - **Route Schedule** - General information related to pickup/delivery times for common carriers used in shipping or returning materials.
  - **ILL Contact Name** - Name of the staff member responsible for managing ILL activities for the library.
  - **ILL Contact Title** - Title of the staff member responsible for managing ILL activities for the library.
  - **ILL Phone Number: General** - Phone number used to reach the library for general matters related to ILL.
  - **ILL Phone Number: Borrowing** - Phone number used to reach the library for matters related to borrowing activities.
  - **ILL Phone Number: Lending** - Phone number used to reach the library for matters related to lending activities.
  - **ILL Phone Number: Contact** - Phone number used to reach the specified ILL contact.
  - **ILL Fax Number** - Fax number used to reach the library for matters related to ILL.
  - **ILL Email Address** - Email address used to reach the library for matters related to ILL.
  - **Ariel Address** - Ariel address used to reach the library for matters related to ILL.
  - **ILL Pickup Locations** - Lists all Pickup Locations defined for the library.
- **Holiday List -** Lists the *normal business days* on which the library is closed for holidays or vacation.
- **External Communications**
  - **Transmit request to another system -** Indicates whether ILL requests sent to the library will be transmitted to an ILL system *outside* of the AGent system. Shows **Yes** for ILL trading partners *outside* your consortium. Shows **No** for ILL trading partners that are members of your consortium.
  - **System type -** Shows the system type for the ILL trading partner *outside* your consortium; either **ISO ILL**, **Generic Script messages** or **AGent VERSO CILL**.
  - **Transport method -** Shows the means by which ILL requests are forwarded to the ILL trading partner *outside* your consortium; either **Direct connection (TCP/IP)** or **Email (SMTP)**.
  - **Computer or Email Address -** Address for the computer that will process requests (for **Direct connection** transport method) or email address to which requests will be sent (for **Email** transport method).

- **Computer Port No. -** Port number for the computer that will process requests.
- **ISO System Code –** Alphanumeric code or symbol assigned to a library or ILL provider.
- **Code Type –** The name authority registered with the ILL Application Standards Maintenance Agency responsible for the Library Code or symbol in the ISO System Code. The trading partner will typically provide the ISO System Code and Code Type when setting up an external trading partner. Requests sent to external ISO trading partners will have the Library Code for the AGent library formatted as follows: naming agency:customer code: Library Code. For example, the Reference and Loan Library in Wisconsin will have the following Library Code: a-g:stwi:gzra.

* **Other Related Information**
  - **Is the Library Open to the Public? / Explanation -** Indicates whether or not the library is open to the public, and identifies any exclusions, conditions or limitations.
  - **Can the Public Borrow Material in Person? / Explanation -** Indicates whether or not the public can borrow material from the library in person, and identifies any exclusions, conditions or limitations.
  - **Can the Public Borrow Material through ILL? / Explanation -** Indicates whether or not the public can borrow material from the library through ILL, and identifies any exclusions, conditions or limitations.
  - **Hours Library Open -** Normal business hours for the library.
  - **Exceptions to Library Hours Open -** Indicates any exceptions to the normal business hours for the library.
* **Patron Notification Set-up**

  Information for up to five *patron notification messages may be displayed.*

  - **ILL Status** – The request status that triggers transmission of the patron notification message.
  - **Email Text** – The text included in the patron notification message for the associated request status.
* **Email Notice Set-up**
  - **Email Notice Subject** – The subject line text included in each patron notification message.
  - **Email Notice From Name** – The “From” name included in each patron notification message.
  - **Email Notice From Address** – The “From” address in each patron notification message.
  - **CC Email Address** – The email address to which “courtesy copies” of *all* patron notification messages are sent.
* **URL Information**
  - **Do you want email notification for NEW borrowing requests only? / Email notification address -** Indicates whether or not the library will receive email notifications on receipt of *new* borrowing requests only, either **Yes** or **No**; shows email address to which notifications will be sent.
  - **Do you want email notification for ALL borrowing status changes? / Email notification address -** Indicates whether or not the library will receive email notifications whenever there is a change in status for a borrowing request, either **Yes** or **No**; shows email address to which notifications will be sent.
  - **Do you want email notification for NEW lending requests only? / Email notification address -** Indicates whether or not the library will receive email notifications on receipt of *new* lending requests only, either **Yes** or **No**; shows email address to which notifications will be sent.
  - **Do you want email notification for ALL lending status changes? / Email notification address -** Indicates whether or not the library will receive email notifications whenever there is a change in status for a lending request, either **Yes** or **No**; shows email address to which notifications will be sent.
  - **Library Catalog(URL) -** The URL for the library’s Online Public Access Catalog (OPAC).
  - **Library Homepage(URL) -** The URL for the library’s Home Page.

- ○ **ILL hours open -** The hours during which the library is open for ILL activities.
- ○ **Directions -** Directions for locating the library.
- ○ **Directions(URL) -** The URL for a map and/or "driving directions" page maintained by the library.
- ○ **Regulations(URL) -** The URL for a policies/rules/regulations page maintained by the library.
- ○ **System Message(URL) -** The URL for a general "messages" or "announcements" page maintained by the library.
- ○ **ILL Message(URL) -** The URL for an ILL-specific "messages" or "announcements" page maintained by the library.
- ○ **ILL Help Page(URL) -** The URL for an ILL services "Help" page maintained by the library.
- ○ **Library Help Page(URL) -** The URL for a general library services "Help" page maintained by the library.

To view the Library Information screen:

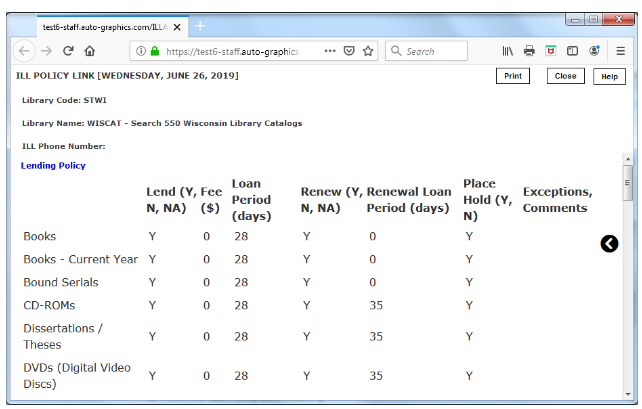
- Use the scrollbar to scroll through the entire page.
- If desired, click the **Hide Empty Fields** button to remove empty fields (fields containing no data) from the display. (Click the **View All Fields** button to show *all* fields in the display.)
- Click the **ILL Policy Link** button to display ILL policy information for the library (see ***Viewing ILL Policies*** on page **154** for details).
- Click the Print button to print a copy of the Library Information Screen (see ***Printing Library Information*** on page **156** for details).
- Click the **Close** button to close the Library Information screen and return to the Library Results List or Search Library Information screen, as applicable.

Viewing ILL Policies

The Library Information screen includes an **ILL Policy Link** to *detailed* ILL policy information for the library.

To view ILL policy information:

1. Access the Library Information screen for the desired library (see ***Searching Library Information*** on page **150** for details).
2. Click the **ILL Policy Link** button.
   - The ILL Policies screen displays in an *additional* browser window.
3. The ILL Policies screen provides the following information:
   - **Lending Policy - The Lending Policy** section contains a listing of material types (books, videos, etc.), and identifies the library's ILL lending policy for *each material type* in its collection.



Lending Policy Screen

   - ○ **Lend (Y, N, NA) -** Indicates whether or not the library lends the associated material type through ILL; **Y** indicates the library *does* lend the associated material type through ILL, **N** indicates the library *does not* lend the associated material type through ILL, **NA** indicates the library *does not own* any items of the associated material type.

  - **Fee ($) -** Lists the fee charged to lend/supply items of the associated material type through ILL. The currency type is set by your consortium.
  - **Loan Period (days) -** Indicates the number of calendar days for which an item of the associated material type can be loaned through ILL. The system default is **0**.
  - **Renew (Y, N, NA) -** Indicates whether or not the loan period for items of the associated material type can be renewed: **Y** indicates the loan period *can* be renewed for items of the associated material type, **N** indicates the loan period *cannot* be renewed for items of the associated material type, **NA** indicates the library *does not own* any items of the associated material type.
  - **Renewal Loan Period (days) -** Indicates the number of calendar days by which the loan period for an item of the associated material type currently on loan can be extended (renewed). The system default is **0**. If the value in the Loan Period is other than **0** and there is a **0** in this column, then it indicates that the initial loan *cannot* be renewed. If the values in the Loan Period and Renewal Loan Period are **0s,** then it may mean that the library has not updated its policies and a renewal request can be made.
  - **Place Hold (Y, N) -** Indicates whether or not "holds" may be placed on items of the associated material type: **Y** indicates "holds" *can* be placed on items of the associated material type, **N** indicates "holds" *cannot* be placed on items of the associated material type through ILL.
  - **Exceptions, Comments -** Indicates any exceptions, restrictions or conditions on the supply of items of the associated material type through ILL.

- **Copies -** The **Copies** section contains a listing of copy methods (**Photo-copy**; **FAX**; **ARIEL, Email, Other**), and identifies the fees charged for copy requests supplied by the lender. The currency type is set by your consortium.
  - **# of copies at no charge -** Indicates the number of print or digital copies (pages) for a given copy request for which no fee is charged.
  - **Per copy charge -** Indicates the fee (price-per-page) for print or digital copies for a given copy request in excess of the **# of copies at no charge**.
  - **Electronic Data/Microfiche/Microfilm/Micropaque/Other -** Indicates the fee (price-per-page) for copies for the associated media type for a given copy request.
- **Shipping Methods -** The **Shipping Methods** section contains a listing of shipping methods (**US Mail**, **UPS**, etc.), indicates whether or not the library utilizes the associated shipping method, and lists the materials that may be shipped by each method listed.
  - **Materials -** Indicates the *specific* materials that may be shipped using the associated shipping method. If the **Materials** field is *blank* for a *supported* shipping method, it indicates that *any material type* may be shipped using the associated method.
  - **Y, N -** Indicates whether or not the library uses the associated shipping method; **Y** indicates the library *does* use the associated shipping method (subject to the limitations listed in the **Materials** field), **N** indicates the library *does not* use the associated shipping method.
- **ILL Acceptance Methods -** The **ILL Acceptance Methods** section contains a listing of ILL request submission methods (**Phone**, **Fax**, etc.), and indicates whether or not the library accepts ILL requests submitted using the associated method.
  - **Accept ILL By (Y, N) -** Indicates whether or not the library accepts ILL requests submitted using the associated method; **Y** indicates the library *does* accept ILL requests submitted using the associated method, **N** indicates the library *does not* accept ILL requests submitted using the associated method.

4. Use the scrollbar to scroll through the entire page.
5. Click the **Close** button to close the ILL Policies screen and return to the Library Information screen.

Printing Library Information

You can print a copy of the Library Information screen.

To print Library Information:

1. Access the Library Information screen for the desired library (see ***Searching Library Information*** on page **150** for details).
   - If desired, click the **Hide Empty Fields** button to remove empty fields (fields containing no data) from the display.
2. Click the **Print** button.
   - A standard Print dialog displays.
3. Make the appropriate selection on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)
4. Click the **Close** link to close the formatted Library Information screen.

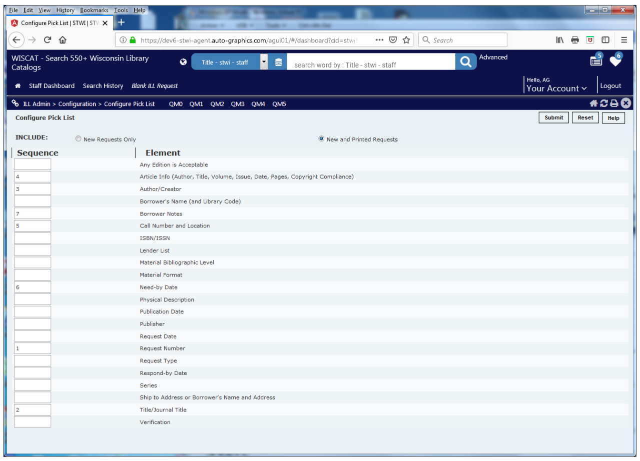
Configuring the Pick List

The **Configure Pick List** function lets you select the *specific* information to be shown for each request in printed Pick Lists, and configure the **Pick List** function (available from the Lender's Pending Status Browse List) to print either new requests *only*, or both new *and* previously printed requests.

*The **Configure Pick List** function is available to Library SuperUsers only (see the **PAC Administration User Guide** for more information).*

To configure Pick Lists:

1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Configure Pick List**.
   - The Configure Pick List screen displays.
2. Use the **INCLUDE** radio buttons to select the type of requests to be included in printed Pick Lists; either **New Requests Only** or **New and Printed Requests**.
3. Use the **Sequence** text boxes to indicate each **Element** you wish shown for requests in printed Pick Lists, and the order in which the elements should be listed.



Configure Pick List Screen

   - Enter the desired **Sequence** number for *each* **Element** you wish to include in printed Pick Lists. Each **Element** must have a *unique* **Sequence** number.
   - If you *do not* wish to include a given **Element** in printed Pick Lists, leave the **Sequence** text box for the **Element** *blank*.
4. When all desired information has been entered, click the **Submit** button to save your changes.

Chapter 8. SHIPPING LABELS AND BOOKSTRAPS

Overview

This chapter provides the procedures for maintaining and printing shipping labels and bookstraps, and for processing ILL requests using the barcodes provided on shipping labels and bookstraps.

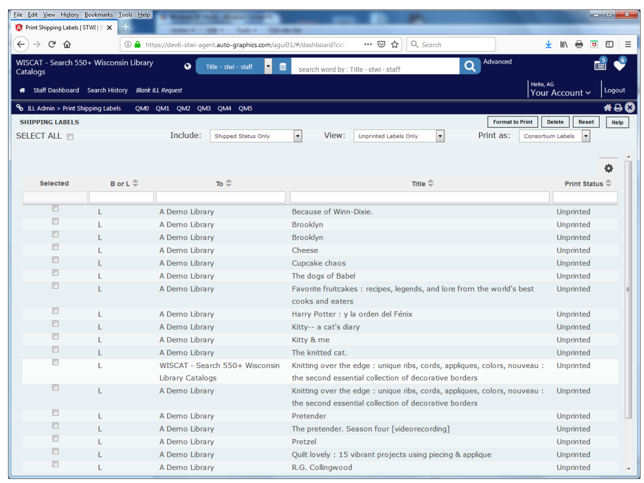
Shipping Labels and Bookstraps are purchasable enhancements, and may not be enabled for all systems. Barcode Processing is an optional feature available only to those libraries or consortia that have enabled Shipping Labels and/or Bookstraps functionality.

Maintaining Shipping Labels

The **Print Shipping Labels** function lets you generate shipping labels for use in shipping loaned items to *borrowing* libraries, or in returning loaned items to *lending* libraries.

To view the shipping labels list:

- Select **Print Shipping Labels** from the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details).
  - The Shipping Labels screen displays.



Shipping Labels Screen

- By default, the Shipping Labels screen lists *all* active ILL requests with a status of **Shipped** for which shipping labels may be printed. Each line in the listing provides the following information:
  - **B or L** – Indicates the “role” of your library for the associated request; either **B** (borrower) or **L** (lender).
  - **To** – the name of the library to which the shipping label will be addressed; either the *borrowing* library (for requests you have received as a *lender*, or the *lending* library (for requests you have submitted as a *borrower*).
  - **Title** – the title of the item requested.
  - **Print Status** – the current print status for the shipping label; either **Printed** or **Unprinted**.
- If desired, you can reconfigure, sort and filter table content (see the ***System Basics User Guide*** for details).
- To limit the list by request status, select the desired option from the **Include** menu: **Shipped Status Only**, **Returned Status Only** or **Both Shipped and Returned**. The default is **Shipped Status Only.**
- To limit the list by print status, select the desired option from the **View** menu; **Unprinted Labels Only**, **Printed Labels Only** or **Both Printed and Unprinted**. The *default* value for the **View** menu is **Unprinted Labels Only**.
- Use the **Print** menu to select the *type* of labels you wish to print; either **Consortium Labels** or **Avery 5160 Labels** (intended for use with ILL requests associated with out-of-consortium participants).

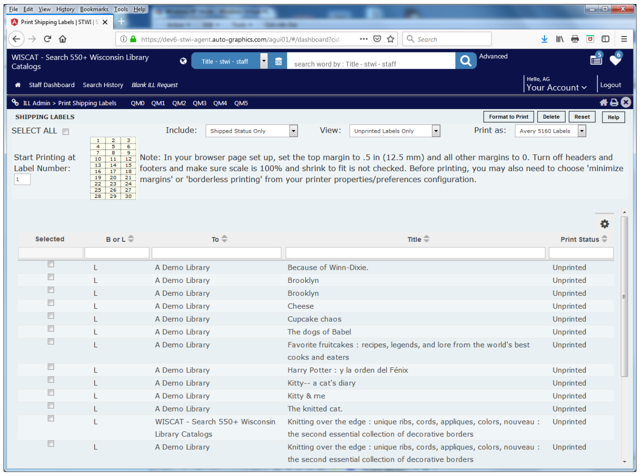
- From the Shipping Labels screen, you may choose to:
  - Print shipping labels for *one or more* ILL requests (see ***Printing Shipping Labels*** on page 158 for details).
  - Delete *one or more* ILL requests from the shipping labels list (see ***Deleting ILL Requests from the Shipping Labels List*** on page 159 for details).

Printing Shipping Labels

Shipping labels can be printed to ship loaned items to the borrowing library, or to return loaned items to the lending library.

To print shipping labels:

1. Access the Shipping Labels screen (see ***Maintaining Shipping Labels*** on page 157 for details).
2. If desired, use the **Include** and **View** menus to limit the list by request and/or print status.
3. Use the **Print** menu to select the *type* of labels you wish to print; either **Consortium Labels** or **Avery 5160 Labels** (intended for use with ILL requests associated with out-of-consortium participants).
   - If **Avery 5160 Labels** is selected, use the **Start Label Printing at Number** text box to specify the label position at which printing should begin; from **1** t0 **30**.



Shipping Labels Screen – Avery 5160 Labels

IMPORTANT: *When printing Avery 5160 labels, be sure to configure your browser and printer properly. In your browser page set up, set the top margin to 0.5 in (12.5 mm) and all other margins to 0. Turn off headers and footers. Make sure scale is 100%. Make sure shrink to fit is not checked. Before printing, you may also need to select 'minimize margins' or 'borderless printing' from your printer properties/preferences configuration.*

4. Use the **Selected** check boxes to select the ILL requests for which you wish to print shipping labels.
   - A *checkmark* indicates a shipping label for the associated request *will be* printed.
   - An *empty checkbox* indicates a shipping label for the associated request *will not be* printed.
   - Click the **SELECT ALL** checkbox to *automatically* select the individual checkboxes for *all* currently displayed shipping labels.
   - Clicking a checkbox repeatedly will toggle it on and off.
5. When all desired ILL requests have been selected, click the **Format to Print** button.
   - An *additional* browser window opens, displaying the formatted shipping labels.
6. Use the standard procedures for your web browser to print the contents of the “labels” window.
7. Close the formatted shipping labels.

*Once the **Format to Print** button has been clicked, the selected ILL requests are marked as **Printed**, regardless of whether or not you physically print the shipping labels. If you do not physically print the shipping labels at this time, it is not possible to return the ILL requests to **Unprinted** status.*

Deleting ILL Requests from the Shipping Labels List

You can delete selected ILL requests from the shipping labels list.

The system *automatically* removes shipping labels from the Shipping Labels list under the following conditions:

- Borrow requests are removed from the Shipping Labels list when the *lender* updates the status of the request to either **Check In** or **Lost**, or when the *borrower* updates the status of the request to **Lost**.
- Copy requests are removed from the Shipping Labels list during midnight processing on the day the *borrower* updates the status of the request to **Received**.

*Once an ILL request has been deleted from the list, it cannot be recovered. If you choose to delete an **Unprinted** request, you should confirm that a shipping label for the request will not be needed prior to deleting the request.*

To delete ILL requests from the shipping labels list:

1. Access the Shipping Labels screen (see ***Maintaining Shipping Labels*** on page **157** for details).
2. If desired, use the **Include** and **View** menus to limit the list by request and/or print status.
3. Use the **Selected** check boxes to select the ILL requests you wish to delete.
   - A *checkmark* indicates the associated request *is* selected for deletion.
   - An *empty checkbox* indicates the associated request *is not* selected for deletion.
   - Click the **SELECT ALL** checkbox to *automatically* select the individual checkboxes for *all* currently displayed shipping labels.
   - Clicking a checkbox repeatedly will toggle it on and off.
4. When all desired ILL requests have been selected, click the **Delete** button.
   - The screen refreshes with the selected ILL requests deleted from the list.

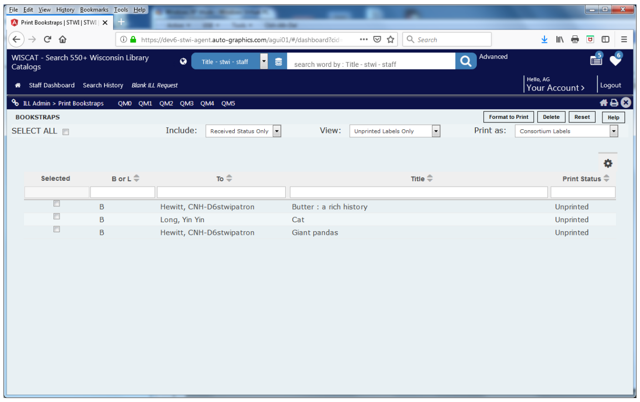
Maintaining Bookstraps

The **Print Bookstraps** function lets you generate bookstraps for use in labeling ILL items checked out to local patrons. The specific information included on bookstraps is set using the **Configure Bookstraps** function (see ***Configuring Bookstraps*** on page **161** for details). Although the bookstraps include the patron name, the borrower may use them to return items back to the lender or the lender can use the bookstraps (without a patron name) to send material to the borrower.

Bookstraps functionality is optional and may not be enabled for all systems.

To view the bookstraps list:

- Select **Print Bookstraps** from the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details).
  - The Bookstraps screen displays.
- By default, the Bookstraps screen lists *all* active ILL requests for which bookstraps may be printed (requests with a *current* status of **Shipped** or **Received**). Each line in the listing provides the following information:



Bookstraps Screen

- ○ **B or L** – Indicates the "role" of your library for the associated request; either **B** (borrower) or **L** (lender).
- ○ **To** – either the name of the *borrowing* library to which the associated item will be supplied; or the name of the patron to whom the ILL item will be "checked out."
- ○ **Title** – the title of the item.
- ○ **Print Status** – the current print status for the bookstrap; either **Printed** or **Unprinted**.

- If desired, you can reconfigure, sort and filter table content (see the ***System Basics User Guide*** for details).
- To limit the list by request status, select the desired option from the **Include** menu; **Shipped Status Only**, **Received Status Only** or **Both Shipped and Received**. The default is **Both Shipped and Received.**
- To limit the list by print status, select the desired option from the **View** menu; **Unprinted Labels Only**, **Printed Labels Only** or **Both Printed and Unprinted**. The default is **Unprinted Labels Only**.
- From the Bookstraps screen, you may choose to:
  - ○ Print bookstraps for *one or more* ILL requests (see ***Printing Bookstraps*** on page **160** for details).
  - ○ Delete *one or more* ILL requests from the bookstraps list (see ***Deleting ILL Requests from the Bookstraps List*** on page **161** for details).

Printing Bookstraps

Borrowers can print bookstraps to accompany ILL items checked out to their patrons and lenders can print bookstraps to ship ILL items to the borrowers.

To print bookstraps:

1. Access the Bookstraps screen (see ***Maintaining Bookstraps*** on page **159** for details).
2. If desired, use the **Include** and **View** menus to limit the list by request and/or print status.
3. Use the **Selected** check boxes to select the ILL requests for which you wish to print bookstraps.
   - A *checkmark* ☑ indicates a bookstrap for the associated request *will be* printed.
   - An *empty checkbox* ☐ indicates a bookstrap for the associated request *will not be* printed.
   - Clicking a checkbox repeatedly will toggle it on and off.
   - Click the **SELECT ALL** checkbox to *automatically* select the individual checkboxes for *all* currently displayed bookstraps.
4. Select the desired label type from the **Print as** menu; **Consortium Labels** or **Avery 6464 Labels (Landscape)**.
5. When all desired ILL requests have been selected, click the **Format to Print** button.
   - An *additional* browser window opens, displaying the formatted bookstraps.
6. Use the standard procedures for your web browser to print the contents of the "bookstraps" window.
7. Close the formatted bookstraps.

*Once the **Format to Print** button has been clicked, the selected ILL requests are marked as **Printed**, regardless of whether or not you physically print the bookstraps. If you do not physically print the bookstraps at this time, it is not possible to return the ILL requests to **Unprinted** status.*

Deleting ILL Requests from the Bookstraps List

You can delete selected ILL requests from the bookstraps list.

The system *automatically* removes bookstraps from the Bookstraps list under the following conditions:

- Borrow requests are removed from the Bookstraps list when the *lender* updates the status of the request to either **Check In** or **Lost**, or when the *borrower* updates the status of the request to **Lost**.
- Copy requests are removed from the Bookstraps list during midnight processing on the day the *borrower* updates the status of the request to **Received**.

Once an ILL request has been deleted from the list, it cannot be recovered. If you choose to delete an ***Unprinted*** *request, you should confirm that a bookstrap for the request will not be needed prior to deleting the request.*

To delete ILL requests from the bookstraps list:

1. Access the Bookstraps screen (see ***Maintaining Bookstraps*** on page **159** for details).
2. If desired, use the **Include** and **View** menus to limit the list by request and/or print status.
3. Use the **Selected** check boxes to select the ILL requests you wish to delete.
   - A *checkmark* indicates the associated request *is* selected for deletion.
   - An *empty checkbox* indicates the associated request *is not* selected for deletion.
   - Click the **SELECT ALL** checkbox to *automatically* select the individual checkboxes for *all* currently displayed bookstraps.
   - Clicking a checkbox repeatedly will toggle it on and off.
4. When all desired ILL requests have been selected, click the **Delete** button.
   - The screen refreshes with the selected ILL requests deleted from the list.

Configuring Bookstraps

The **Configure Bookstraps** function is available to Customer SuperUsers and, optionally, to Library SuperUsers. The **Configure Bookstraps** function determines the content of printed bookstraps. You can select the fields to be included on the bookstraps, set local labels for the fields, and include due dates. You can specify the content to be included independently for bookstraps printed on paper labels and bookstraps printed on Avery labels.

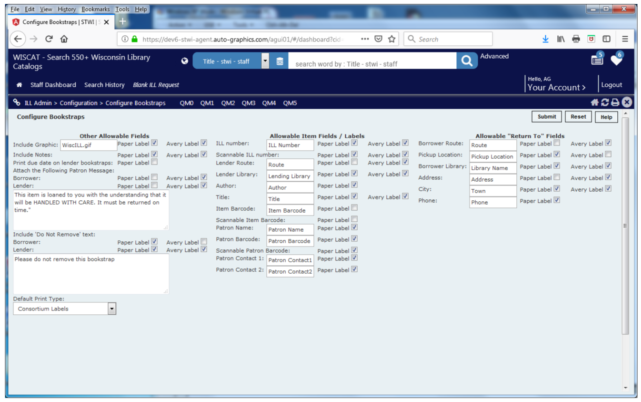
Some options are not available for use with Avery labels.

In cases where only the Customer SuperUser is granted access to the **Configure Bookstraps** function, changes made to bookstraps configuration are applied to all libraries within a consortium or collective.

In cases where both the Customer SuperUser and Library SuperUsers are granted access to the **Configure Bookstraps** function:

- Customer Superusers can log in and access the **Configure Bookstraps** function at any library.
- Library Superusers can only log in and access the **Configure Bookstraps** function at their library *only*.
- Changes made by the Customer Superuser are applied to *all* libraries within a consortium or collective, but can be overridden at an individual library by the Library SuperUser.

To configure bookstraps:



Configure Bookstraps Screen

1. Select **Configure Bookstraps** from the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details).
   - The Configure Bookstraps screen displays.
   - The screen is pre-filled with the currently specified parameters for bookstraps.

   When configuring bookstraps, clicking a checkbox repeatedly will toggle it on and off.

2. The **Other Allowable Fields** options let you include supplemental information and specify the method by which due dates on bookstraps are calculated. Specify **Other Allowable Fields** for inclusion on bookstraps using the **Paper Label** and **Avery Label** checkboxes, as desired:
   - Use the **Include Graphic** checkboxes to indicate whether or not the default ILL graphic should be included on bookstraps.
     - A *checkmark* indicates the ILL graphic *will be* included on bookstraps.
     - An *empty checkbox* indicates the ILL graphic *will not be* included on bookstraps.

     *The associated text box shows the file name for the default ILL graphic. If you wish to use and alternate or customized graphic, Contact Auto-Graphics Technical Services for assistance. Otherwise, **DO NOT** change the information in this field.*
   - Use the **Include Notes** checkboxes to indicate whether or not patron and staff notes included in the ILL request associated with the item should be included on bookstraps.
     - A *checkmark* indicates patron and staff notes *will be* included on bookstraps.
     - An *empty checkbox* indicates patron and staff notes *will not be* included on bookstraps.
   - If appropriate, use the **Print due date on lender bookstraps** checkboxes to indicate whether or not due dates should be included on lender bookstraps.
     - A *checkmark* indicates the due date *will* be included on lender bookstraps.
     - An *empty checkbox* indicates the due date *will not* be included on lender bookstraps.
   - Use the **Attach the Following Patron Message** checkboxes to indicate whether or not a “generic” patron message should be included on bookstraps printed by the **Lender** and/or **Borrower**.
     - A *checkmark* indicates a patron message *will be* included on bookstraps when printed by the specified participant.
     - An *empty checkbox* indicates a patron message *will not be* included on bookstraps when printed by the specified participant.
   - If any **Attach the Following Patron Message** checkbox is selected, enter the desired patron message in the associated text box.
   - Use the **Include ‘Do Not Remove’ text** checkboxes to indicate whether or not a “Do Not Remove” message should be included on bookstraps printed by the **Lender** and/or **Borrower**.
     - A *checkmark* indicates a “Do Not Remove” message *will be* included on bookstraps when printed by the specified participant.
     - An *empty checkbox* indicates a “Do Not Remove” message *will not be* included on bookstraps when printed by the specified participant.

- If any **Include 'Do Not Remove' text** checkbox is selected, enter the desired "Do Not Remove" message in the associated text box.
- Select the desired default label type for bookstraps from the **Default Print Type** menu; **Consortium Labels** or **Avery 6464 Labels (Landscape)**.

  *The **Default Print Type** setting determines the default selection in the **Print as** menu on the Bookstraps screen (see **Printing Bookstraps** on page **160** for details).*

3. The **Allowable Item Fields / Labels** options let you include information related to the ILL request (**ILL Number**, **Scannable ILL Number**), **Lender Route** information, the **Lender Library**, the borrowed item (**Author, Title**, **Item Barcode**, **Scannable Item Barcode**), and the patron that requested the item (**Patron Name**, **Patron Barcode**, **Scannable Patron Barcode**, **Patron Contact1**, **Patron Contact2**). Specify the **Allowable Item Fields / Labels** to be included on bookstraps using the **Paper Label** and **Avery Label** checkboxes, as desired:, as desired:
   - A *checkmark* indicates the associated field *will be* included on bookstraps.
   - An *empty checkbox* indicates the associated field *will not be* included on bookstraps.
   - If desired, edit the field names for selected fields using the associated text boxes.
4. The **Allowable "Return To" Fields** options let you include **Borrower Route** information and **Pickup Location**, the **Borrower Library** name, return **Address** and **City**, and **Phone** number. Specify the **Allowable "Return To" Fields** to be included on bookstraps using the **Paper Label** and **Avery Label** checkboxes, as desired:
   - A *checkmark* indicates the associated field *will be* included on bookstraps.
   - An *empty checkbox* indicates the associated field *will not be* included on bookstraps.
   - If desired, edit the field names for selected fields using the associated text boxes.
5. When all bookstrap options have been configured, click the **Submit** button to save your changes.

ILL Request Barcode Processing

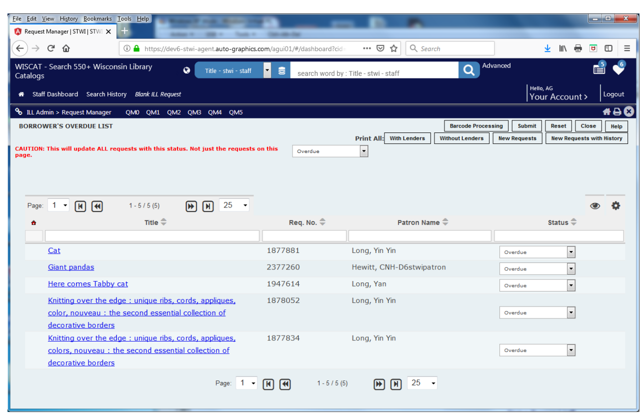
Each Shipping Label and Bookstrap includes a *unique* barcode representing the system-generated Request Number of the associated ILL request. The *optional* **Barcode Processing** feature allows library staff to process ILL requests (update the status of a request) by scanning the barcode on the Shipping Label or Bookstrap accompanying the loaned or supplied material.

Your workstation must be equipped with a "3/9-compatible" barcode reader in order to perform Barcode Processing of ILL requests.

To perform Barcode Processing:

1. Select **Request Manager** from the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details).
   - The Request Manager screen displays.
2. Click the link for the status category for which you wish to perform barcode processing.

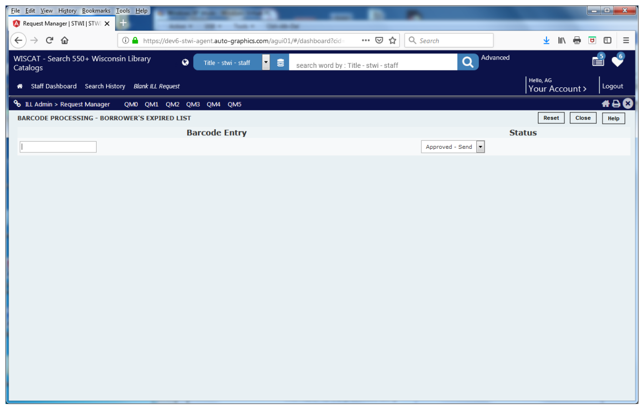
   Categories in which no ILL requests are included are shown in "normal" type; these categories cannot be selected.



Status Browse List

- To process requests that require action, click a link in the **Manage Borrower Requests - Action Items** field or **Manage Lender Requests - Action Items** field, as appropriate.
- To process requests awaiting action by trading partners, click a link in the Manage Borrower Requests - Items awaiting trading partner response field or Manage Lender Requests - Items awaiting trading partner response field, as appropriate.

3. A browse list of all current ILL requests in the selected status category displays. The list is arranged alphabetically by title, and includes current status information.
4. Click the **Barcode Processing** button.
   - The Barcode Processing screen for the *current* Status Browse List displays.



Barcode Processing Screen

5. Select the status you wish to apply to the processed requests from the **Status** menu and select the desired reason or condition for the status change from the **Reason/Condition** menu, if appropriate.
6. Scan the barcode on the Shipping Label or Bookstrap for the item you wish to process.
   - The Barcode Processing screen refreshes to display a **Status of Update** message and reference information for the processed title.
   - If desired, click the **Reset** button to clear the current barcode number.
7. Repeat step **6** to process *additional* items.

   If you wish to apply a different *status or condition to a given item,* be sure *to change the* ***Status*** *menu or* ***Reason/Condition*** *menu selection* prior to *scanning the barcode for the item.*
8. When all desired items have been processed, click the **Close** button to return to the Status Browse list.

Chapter 9. CUSTOMER SUPERUSER

Overview

This chapter provides the procedures to configure the default ILL Request Forms, configure the Request Manager, perform a Global Request Search, and maintain batch Holiday Lists.

The procedures provided in this chapter are available to Customer SuperUsers only.

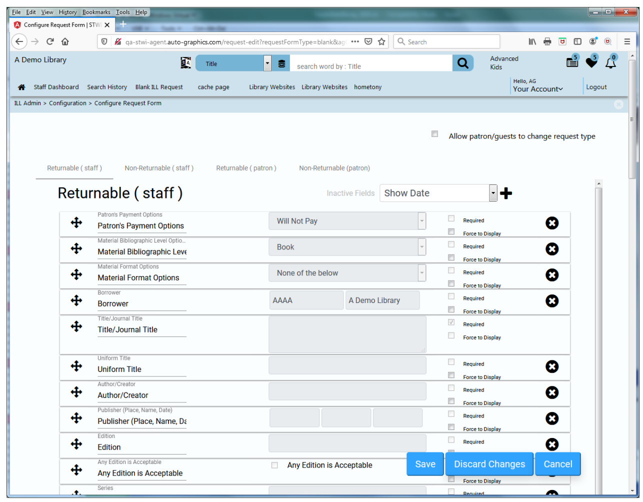
Configuring the Default ILL Request Forms

When accessing ILL Administration as a Customer SuperUser, the **Configure Request Forms** function lets you establish the *default* ILL Request Form and Blank Request Form content and arrangement for **Returnable (staff)**, **Non-Returnable (staff)**, **Returnable (patron)** and **Non-Returnable (patron)** requests.

The default ILL Request Forms are applied to new libraries and to libraries that have not locally modified the request forms. Once changes to the request forms have been made at the library level (to field names and/or display order), subsequent changes to the default request forms in these areas will not be reflected locally. Changes to available fields will continue to be reflected at the local level.

- From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Configure Request Forms**.
  - The Configure Request Forms screen displays.
- Use the **Allow patron/guests to change request type** radio button to establish whether or not library guests/patrons can change the request type once the request form has been displayed.

  *When **Request this Item** is selected from a Brief Browse List or Full Record Display, the system determines the appropriate request type, **Returnable (loan)** or **Non-Returnable (copy)**, based on the item being requested, and displays the associated request form. By default, the request type for the Blank Request Form is **Returnable (loan)**.*



Configure Request Forms Screen

  - A *checkmark* indicates that guests/patrons *can* change the request type.
  - An *empty checkbox* indicates that guests/patrons *cannot* change the request type.
  - Clicking the checkbox repeatedly will toggle it on and off.
- Click the tab for the request form you wish to configure; **Returnable (staff)**, **Non-Returnable (staff)**, **Returnable (patron)** or **Non-Returnable (patron)**.
- The Configure Request Forms screen lists *all* fields currently included in the respective ILL request form in the order in which they appear on the form, and provides the following information for each field:

  *Fields that are currently inactive (not included in the form) are listed in the **Inactive Fields** menu.*

  - The *default* name of the data field. Local labels may be applied to certain fields.
  - An illustration of how the field will appear on the form (as a text box, drop-down menu, etc.).

- ○ Checkboxes that allow “optional” fields included in the form to be configured as “mandatory” and/or required fields.

To configure ILL Request Forms:

- From the Configure Request Forms screen, you may choose to:
  - ○ Set the display sequence for form fields (see ***Setting the Display Sequence*** on page **171** for details)
  - ○ Add “optional” fields to the form (see ***Configuring “Optional” Fields*** on page **172** for details)
  - ○ Assign a local label to selected fields (see ***Assigning Local Labels*** on page **172** for details)
  - ○ Configure selected fields as ”required” or “mandatory” (see ***Designating “Mandatory” Fields*** on page **172** for details)

ILL Request Form Fields

Form Field	Description / Comments	Used On	
		Loan	Copy
Any Edition is Acceptable	Checkbox; default state established in Participant Record.	P/S/A	
Article Author	Text box.		P/S/A
Article Date	Text box / drop-down menus. **Year** element is required; **Month / Season** and **Day** elements are optional.		P/S/A
Article Information (Volume, Issue, Pages)	Text boxes. **Pages** element is required; **Volume** and **Issue** elements are optional.		P/S/A
Article Title	Text box.		P/S/A
Author/Creator	Populated from bibliographic record (MARC Tag 1xx) if present; text box on Blank Request Form.	P/S/A	P/S/A
Borrower	Read-only field / drop-down menu; populated from Participant Record. For systems employing Network Lender functionality, this field includes a drop-down menu for selection of the appropriate borrowing library.	P/S/A	P/S/A
Borrower’s Email	Hyperlink; populated from Participant Record, as available. Shown on Lender’s view only.	A	A
Borrower’s Notes	Text box (Borrower); read-only field (Lender).	P/S/A	P/S/A
Borrower's Phone	Text box; pre-filled by the system with the **ILL Phone Number: General** from Participant Record, as available.	A	A
Call Number and Location	Text box (Lender); read only field (Borrower)	A	A
Charges	Text box (Lender); read-only field (Borrower)	A	A
Copyright Compliance	For U.S. requests only; read-only field. Displays **ccg/ccl** as appropriate. Displayed to lender once request has been assigned a request number; displayed to borrower in **Shipped** and subsequent statuses.		A
Copyright Compliance Options	For U.S. requests only; drop down menu for Borrower selection of Copyright Compliance, **ccg/ccl** as appropriate.		A
Create a Password	For patron Request Forms only; text box. Pre-filled by system for authenticated patrons with password taken from User Record.	P	P
Current Lender’s Note	Text box (Lender); read-only field (Borrower)	A	A

Form Field	Description / Comments	Used On	
		Loan	Copy
Customer Field 1	Text box; for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Field 2	Text box; for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Field 3	Text box; for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Field 4	Text box; for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Field 5	Text box; for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Field 6 (checkbox)	Checkbox, for locally defined content. Displays to all libraries in consortium.	P/S/A	P/S/A
Customer Help	Hyperlink to URL specified in **ILL Help Page** field on Participant Record.	P/S	P/S
Date Checked In	Text box (Lender); read-only field (Borrower). Pre-filled by system with current calendar date, editable by Lender using calendar function.	A	
Date Received	Text box (Borrower); read-only field (Lender). Pre-filled by system with current calendar date, editable by Borrower using calendar function.	A	A
Date Renewal Requested	Text box (Borrower); read-only field (Lender).	A	
Date Returned	Text box (Borrower; read-only field (Lender). Pre-filled by system with current calendar date, editable by Borrower using calendar function.	A	
Date Shipped	Text box (Lender); read-only field (Borrower). Pre-filled by system with current calendar date, editable by Lender.	A	A
Document URL	Text box (Lender); hyperlink (Borrower). Displayed to Lender in **Pending** and **Will Supply** statuses; displayed to Borrower in **Shipped** status.	A	
Due Date	Text box (Lender); read-only field (Borrower). Pre-filled by system based on Lender’s **Days to Return**; editable by Lender using calendar function. Also used for **Renewed to Date**.	A	
Edition	Populated from bibliographic record (MARC Tag 250) if present; text box on Blank Request Form.	P/S/A	P/S/A
For Patron: Why Request was not Filled	Text box. Content available to patron through ILL Request Tracking.	A	A
History Information	Read-only field; system supplied.	A	A
Insured For	Text box (Lender); read-only field (Borrower).	A	A
ISBN	Populated from bibliographic record (MARC Tag 020) if present; text box on Blank Request Form. Up to three entries supported.	P/S/A	P/S/A
ISSN	Populated from bibliographic record (MARC Tag 022) if present; text box on Blank Request Form. Up to three entries supported.	P/S/A	P/S/A
Item Barcode (Borrower)	Text box (Borrower). Pre-filled with ILL Request Number.	A	
Item Barcode (Lender)	Text box (Lender); read-only field (Borrower).	A	
Lender	System supplied. Shows Lender Code and Lender Name.	A	A

Form Field	Description / Comments	Used On	
		Loan	Copy
Lender List	Text box (Borrower); read-only field (Lender). Displays all future Lender's to Borrower, next five Lenders to Lender. Not included on initial staff form for systems using SSS.	S/A	S/A
Lender's Email	Hyperlink; populated from Participant Record, as available. Shown on Borrower's view only.	A	A
Lender's Fax	Read-only field. Populated from Participant Record, as available. Shown on Borrower's view only.	A	A
Lenders' Notes	Text box (Lender); read-only field (Borrower).	A	A
Lender's Phone	Read-only field. Populated from Participant Record, as available.	A	A
Lending Restrictions	Read-only field. Taken from Lender's **Reason/Condition**.	A	
Library of Congress Control Number	Populated from bibliographic record (MARC Tag 020 $a) if present; text box on Blank Request Form.	P/S/A	P/S/A
Locate Lender	Action button. Used in locating Lender's for inclusion in the **Lender List**. Not included for systems using SSS.	A	A
Material Bibliographic Level	Read-only field. Displays value selected from **Material Bibliographic Level Options**.	A	A
Material Bibliographic Level Options	Drop-down menu. Populated from bibliographic record (LDR/06-07)	P/S	P/S
Material Format	Populated from bibliographic record if textual material (LDR/06 for book, serial, mixed material; MARC Tag 008 for books, computer files, maps, music, serials, visual materials, mixed materials).	A	A
Material Format Options	Drop-down menu.	P/S	P/S
Max Cost	Text box. Specified in Borrower's currency.	P/S/A	P/S/A
Need by	Text box. Pre-filled with system-calculated default date. Editable by patron/staff using calendar function.	P/S/A	P/S/A
Number of Copies Needed (over 1 creates multiple requests)	Text box. *This field is applicable to* ***Returnable (loan)*** *requests only. This field is not shown on the Blank Request Form (see* ***Using the Blank Request Form*** *on page* ***22*** *for details).*	S/A	
Number of Pieces/Pages Shipped	Text box (Lender); read-only field (Borrower).	A	A
OCLC Number	Populated from bibliographic record (MARC Tag 035) if present, text box on Blank Request Form.	P/S/A	P/S/A
Other Standard Identifier	Populated from bibliographic record (MARC Tag 024, $a, first indicator = 1).	P/S/A	P/S/A
Patron Lookup	Action button. Used in patron authenticated systems (employing the User Administration module) to locate the patron for the request.	S	S
Patron's Address 1	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Address 2	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A

Form Field	Description / Comments	Used On	
		Loan	Copy
Patron's Address 3 (City, State, ZIP)	Text boxes. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Contact 1	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Contact 2	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's First Name	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Last Name	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Library Card Number	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only. Required for Circ-ILL implementations.	P/S/A	P/S/A
Patron's Library Card Number (printed barcode)	Printed barcode. Optional feature may not be enabled for all systems.	A	A
Patron's Middle Name	Text box. Pre-filled by the system from patron's User Record for patron initiated requests, editable by patron; populated through **Patron Lookup** or manual entry for staff initiated requests. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Notes	Text box. Participant Record option determines if request with not should move to **Awaiting Approval**. Shown in Borrower's view only.	P/S	P/S
Patron's Payment Method	Read-only field. Displays value selected from **Patron's Payment Options**. Shown in Borrower's view only.	A	A
Patron's Payment Options	Drop-down menu. Populated from Participant Record.	P/S	P/S
Patron's Program and Course	Text box. Shown in Borrower's view only.	P/S/A	P/S/A
Patron's Status and Year	Text box. Shown in Borrower's view only.	P/S/A	P/S/A
Physical Description	Populated from bibliographic record (MARC Tag 035) if present, text box on Blank Request Form.	P/S/A	P/S/A
Pickup Location	Read-only field. Displays value selected from **Pickup Location Options**. Shown in Borrower's view only.	A	A

Form Field	Description / Comments	Used On	
		Loan	Copy
Pickup Location Options	Drop-down menu. Populated from Participant Record. Shown in Borrower's view only.	P/S	P/S
Publisher (Place, Name, Date)	Populated from bibliographic record (MARC Tag 260 or 264) if present, text boxes on Blank Request Form.	P/S/A	P/S/A
Publisher Number	Populated from bibliographic record (MARC Tag 028 $a) if present.	P/S/A	P/S/A
Publisher Source	Populated from bibliographic record (MARC Tag 028 $b) if present.	P/S/A	P/S/A
Reason Condition/Options	Drop-down menu. Shown in Lender's view only.	A	A
Request Date	Read-only field. Shows current calendar date.	A	A
Request Number	Read-only field. System supplied.	A	A
Request Number (printed barcode)	Printed Barcode. Optional feature may not be enabled for all systems.	A	A
Request Type	Read-only field. Displays request type selected (default selection is determined by material type of item being requested.. Shown in Borrower's view only.	A	A
Respond By Date	Read-only field. Populated from current "deadline date." Shown in Lender's view only.	A	A
Return To Address 1	Text box (Lender); read-only field (Borrower). Populated from Lender's Participant Record. Editable by Lender.	A	
Return To Address 2	Text box (Lender); read-only field (Borrower). Populated from Lender's Participant Record. Editable by Lender.	A	
Return To Address 3 (City, State, ZIP)	Text boxes (Lender); read-only fields (Borrower). Populated from Lender's Participant Record. Editable by Lender.	A	
Return To Country	Text box (Lender); read-only field (Borrower). Populated from Lender's Participant Record. Editable by Lender.	A	
Return To Name	Text box (Lender); read-only field (Borrower). Populated from Lender's Participant Record. Editable by Lender.	A	
Series	Populated from bibliographic record (MARC Tag 440 an$p or 830 av for returnable (loan) requests, MARC Tag 260 or 264 for copy (non-returnable) requests), text box on Blank Request Form.	P/S/A	P/S/A
Ship To Address 1	Text box (Borrower); read-only field (Lender). Populated from Ship To Address in Lender's Participant Record (if no Ship To Address, taken from main Address). Editable by Lender.	A	A
Ship To Address 2	Text box (Borrower); read-only field (Lender). Populated from Ship To Address in Lender's Participant Record (if no Ship To Address, taken from main Address). Editable by Lender.	A	A
Ship To Address 3 (City, State, ZIP)	Text box (Borrower); read-only field (Lender). Populated from Ship To Address in Lender's Participant Record (if no Ship To Address, taken from main Address). Editable by Lender.	A	A
Ship To Ariel	Text box (Borrower); read-only field (Lender). Populated from Lender's Participant Record. Editable by Lender.		A

Form Field	Description / Comments	Used On	
		Loan	Copy
Ship To Country	Text box (Borrower); read-only field (Lender). Populated from Ship To Address in Lender's Participant Record (if no Ship To Address, taken from main Address). Editable by Lender.	A	A
Ship To Email	Text box (Borrower); read-only field (Lender). Populated from Lender's Participant Record. Editable by Lender.		A
Ship To Fax	Text box (Borrower); read-only field (Lender). Populated from Lender's Participant Record. Editable by Lender.		A
Ship To Name	Text box (Borrower); read-only field (Lender). Populated from Lender's Participant Record. Editable by Lender.	A	A
Shipped Via	Read-only field. Displays value selected from **Shipped Via Options**. Shown in Borrower's view only.	A	A
Shipped Via Options	Drop-down menu. Shown in Lender's view only.	A	A
Shipper's Tracking Number	Text box (Lender); read-only field (Borrower).	A	A
Show Date	Editable by /staff using calendar function.	P/S/A	
Source of Article Citation	Text box (Borrower); read-only field (Lender).		P/S/A
Status	Read only field. Displays value selected from **Status Options**. Shown in Borrower's and Lender's view, depending on current status.	A	A
Status Options	Drop-down menu. Shown in Borrower's and Lender's view, depending on current status.	A	A
This Format Only	Checkbox (Borrower); Read-only field (Lender).	P/S/A	
Title/Journal Title	Populated from bibliographic record (MARC Tag 245 $a $b $h $n $p) if present; text box on Blank Request Form.	P/S/A	P/S/A
Uniform Title	Populated from bibliographic record (MARC Tag 130) if present; text box on Blank Request Form.	P/S/A	P/S/A
Verification	Hyperlink (for records from AG databases), includes resource name and AGCN; read-only field (for records from Z39.50 targets, includes text "Created from Z39.50 record (*MARC Tag 001 value*): (*library name*)."	P/S/A	P/S/A
Volumes Needed	Text box.	P/S/A	

Setting the Display Sequence

You can define the order in which fields (elements) are listed on the request form.

To set the display sequence for ILL Request Forms:

- Position the cursor on the ✥ icon for the field you wish to move.
- *Click and hold* the left mouse button, then *drag* the field to the desired position in the list.
- Repeat as necessary to reposition additional fields.
- When all desired changes have been made, click the **Save** button to save your changes. (Click the **Discard Changes** button to discard your changes and reset the form to its previous condition. Click the **Cancel** button to discard your changes and close the Configure Request Forms screen.)

Configuring "Optional" Fields

The ILL request forms can include a combination of "system required" and "optional" fields (elements). "Optional" elements are indicated by a ⊗ icon in the right margin of the field. These elements may be selectively included in or excluded from the request form.

To *add* an optional field to the form:

- Select the "optional" field you wish to add to the form in the **Inactive Fields** menu.
- Click the ➕ icon to add the selected field to the form.
    - The field is added as the *first entry* in the form.
- Set the display sequence for the added field as desired (see ***Setting the Display Sequence*** on page **137** for details)
- When all desired changes have been made, click the **Save** button to save your changes. (Click the **Discard Changes** button to discard your changes and reset the form to its previous condition. Click the **Cancel** button to discard your changes and close the Configure Request Forms screen.)

To *remove* an optional field from the form:

- Click the ⊗ icon to add the selected field to the form.
    - The field is removed from the form and returned to the **Inactive Fields** menu..

Assigning Local Labels

You can assign *local labels* to certain form fields (elements). A text area is included for each field into which you may assign a local label.

To assign local labels:

- Enter the desired local label in the text area.
    - The local label cannot exceed 30 characters, *including spaces*.
- When local labels have been entered for all desired fields, click the **Save** button to save your changes. (Click the **Discard Changes** button to discard your changes and reset the form to its previous condition. Click the **Cancel** button to discard your changes and close the Configure Request Forms screen.)

  If a currently selected element for which you have entered a local label is subsequently de-selected, the local label will be retained.

Designating "Mandatory" Fields

The ILL Request Form and Blank Request Form can contain a combination of *required* and *optional* data fields (elements).

- "System required" mandatory elements *do not* include a ⊗ icon (cannot be removed to the **Inactive Fields** menu) and include a *static checkmark* ☑ in the **Required** field. These fields are *always* included in the request form and are *always* required.
- "System required" elements that *are not* mandatory *do not* include a ⊗ icon (cannot be removed to the **Inactive Fields** menu) and include a *static checkbox* ☐ in the **Required** field. These fields are *always* included in the request form and are *never* required.
- You can use the **Force to Display** checkbox for an "optional" field to force the field to be "mandatory."

- Elements that you may *optionally* designate as “required” are indicated by a icon in the right margin of the field and an *active checkbox* in the **Required** field.

To force a field to display:

- Use the **Force to Display** checkboxes to designate “optional” fields as “mandatory.”
  - A *checkmark* indicates the field *is* mandatory.
  - An *empty checkbox* indicates the field *is not* mandatory.
  - Clicking a checkbox repeatedly will toggle it on and off.
- When all desired “mandatory” fields have been configured as desired, click the **Save** button to save your changes. (Click the **Discard Changes** button to discard your changes and reset the form to its previous condition. Click the **Cancel** button to discard your changes and close the Configure Request Forms screen.)

To designate “required” fields:

- Use the **Required** checkboxes to designate a field as “mandatory.”
  - A *checkmark* indicates the field *is* mandatory.
  - An *empty checkbox* indicates the field *is not* mandatory.
  - Clicking a checkbox repeatedly will toggle it on and off.
- When all desired “mandatory” fields have been configured as desired, click the **Save** button to save your changes. (Click the **Discard Changes** button to discard your changes and reset the form to its previous condition. Click the **Cancel** button to discard your changes and close the Configure Request Forms screen.)

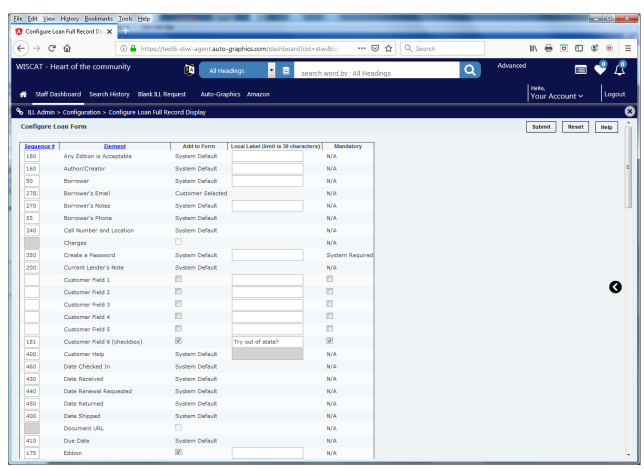
Configuring the Default ILL Request Full Record Displays

When accessing ILL Administration as a Customer SuperUser, the **Configure Loan Full Record Display** and **Configure Copy Full Record Display** functions let you establish the *default* content and arrangement for **Returnable** (loan) and **Non-Returnable** (copy) request Full Record Displays.

Configuration of the “loan” Full Record Display and “copy” Full Record Display is accomplished in a similar manner.

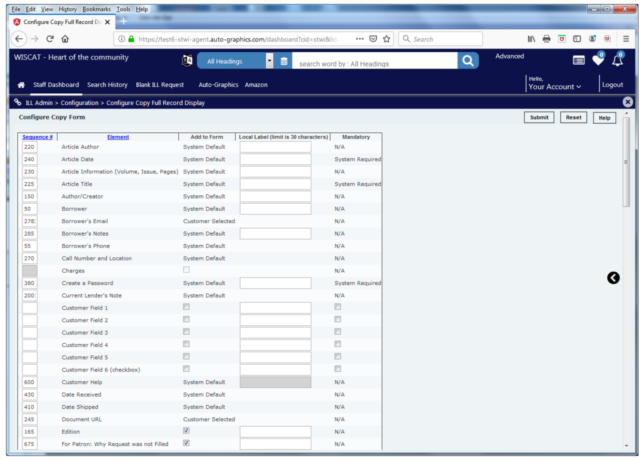
The default ILL Request Full Record Displays are applied to new libraries and to libraries that have not locally modified the request forms. Once changes to the request forms have been made at the library level (to field names and/or display order), subsequent changes to the default request forms in these areas will not be reflected locally. Changes to available fields will continue to be reflected at the local level.

- From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Configure Loan Full Record Display** or **Configure Copy Full Record Display**, as desired.
  - The Configure Loan Form or Configure Copy Form screen displays, as appropriate.
- The Configure Loan Form and Configure Copy Form screens list *all* fields that may be included in the respective ILL request Full Record Displays, and provide the following information for each field:.
  - **Sequence #** – specifies the order in which the field is shown on the Full Record Display.



Configure Loan Full Record Display Screen

- ○ **Element** – the *default* name of the data field. Local labels may be applied to certain fields.
- ○ **Add to Form** – allows “optional” data fields to be included in or excluded from the Full Record Display; “system required” data fields (identified by the notation “System Default”) are *always* included in the form. “Optional” fields configured by the Customer SuperUser for your consortium or collective are identified by the notation “Customer Selected.”
- ○ **Local Label (limit is 30 characters)** – Allows a local label to be applied to certain fields.
- ○ **Mandatory** – allows “optional” fields included in the form to be configured as “mandatory.”



Configure Copy Full Record Display Screen

- Click the **Sequence #** link to sort the screen numerically by sequence number for the associated form. Click the **Element** link to sort the screen alphabetically by element name.
- From the Configure Loan Form or Configure Copy Form screen, you may choose to:
  - ○ Set the display sequence for form fields (see ***Setting the Display Sequence*** on page **174** for details)
  - ○ Add “optional” fields to the form (see ***Configuring “Optional” Fields*** on page **175** for details)
  - ○ Assign a local label to selected fields (see ***Assigning Local Labels*** on page **175** for details)
  - ○ Configure selected fields as “mandatory” (see ***Designating “Mandatory” Fields*** on page **175** for details)

Setting the Display Sequence

You can define the order in which fields (elements) are listed on the Full Record Display.

To set the display sequence for the Full Record Display:

- Use the **Sequence #** text boxes to enter the desired display sequence for each element.
  - ○ You can enter any number from “**0**” to “**9999**” as a display sequence number.
  - ○ You *must* enter a *unique* display sequence number for *each* element.

    *If the same display sequence number is used for more than one element, the message “Duplicate value” displays at the top of the screen and next to the duplicate **Sequence #**s when you submit your changes.*

  - ○ You can enter display sequence numbers in *numeric order* (1, 2, 3, etc.), or, you can *skip numbers* (10, 20, 30, etc.) to allow for easier re-sequencing of elements.
- When display sequence numbers have been entered for *all* elements included in the form, click the **Submit** button to save your changes.

  You must enter a display sequence number for all *included elements. If you* do not *enter a display sequence number for a given included element, the message “Missing sequence #” displays at the top of the screen and next to the missing **Sequence #**s when you submit your changes.*

Configuring "Optional" Fields

The ILL request Full Record Displays can include a combination of "system required" and "optional" fields (elements). "System required" elements are indicated by the notation "System Default" in the **Add to Form** column. These elements *cannot* be excluded from the form. "Optional" elements are indicated by a checkbox in the **Add to Form** column. These elements may be selectively included in or excluded from the request form.

To configure "optional" fields for the Full Record Display:

- Use the **Add to Form** checkboxes to *include* an "optional" element in the form or *exclude* an optional element from the Full Record Display.
  - A *checkmark* indicates the field will be *included* in the Full Record Display.
  - An *empty checkbox* indicates the field will be *excluded* from the Full Record Display.
  - Clicking a checkbox repeatedly will toggle it on and off.
- When all "optional" fields have been configured as desired, click the **Submit** button to save your changes.

  If you de-select *a previously selected "optional" element, the* ***Sequence #*** *for the element is deleted* automatically*.*

Assigning Local Labels

You can assign *local labels* to certain Full Record Display fields (elements). The **Local Label (limit is 30 characters)** column includes a text box for each element to which you may assign a local label.

To assign local labels:

- Enter the desired local label in the **Local Label (limit is 30 characters)** text box.
  - The local label cannot exceed 30 characters, *including spaces*.
- When local labels have been entered for all desired elements, click the **Submit** button to save your changes.

  If a currently selected *element for which you have entered a local label is subsequently* de-selected*, the local label will be retained.*

Designating "Mandatory" Fields

ILL request Full Record Displays can contain a combination of *required* and *optional* data fields (elements). "System required" mandatory elements are indicated by the notation "System Required" in the **Mandatory** column. These fields are *always* included in Full Record Displays and are *always* mandatory. "System required" elements that *are not* mandatory are identified by the notation "N/A" in the **Mandatory** column. These fields are *always* included in the request form and are *never* mandatory. Elements that you may *optionally* designate as mandatory are indicated by a checkbox in the **Mandatory** column.

To designate "mandatory" fields:

- Use the **Mandatory** checkboxes to designate a field as "mandatory."
  - A *checkmark* indicates the field *is* mandatory.
  - An *empty checkbox* indicates the field *is not* mandatory.
  - Clicking a checkbox repeatedly will toggle it on and off.

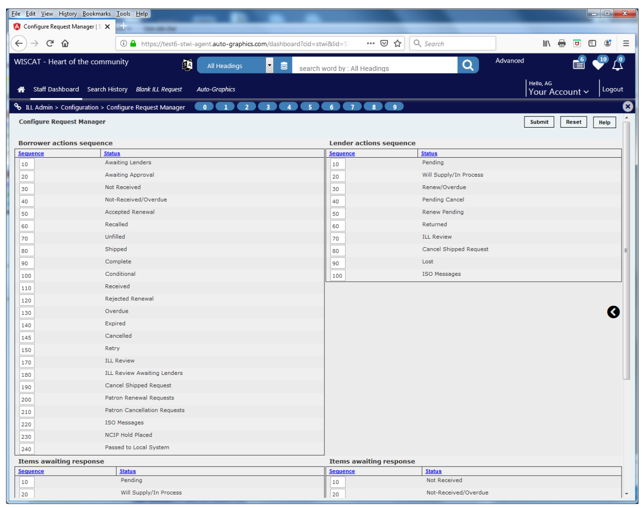
- When all desired "mandatory" fields have been configured as desired, click the **Submit** button to save your changes.

Configuring the Request Manager

The **Configure Request Manager** function lets you set the order in which statuses are listed in the Request Manager.

To configure the Request Manager:

1. Select **Configure Request Manager** from the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details).
   - The Configure Request Manager screen displays.
   - The Configure Request Manager screen provides separate status lists for **Borrower actions sequence**, **Lender actions sequence**, Borrower **Items awaiting response** and Lender **Items awaiting response**.
   - Click the **Sequence** or **Status** link for a status list to re-sort the list according to the selected sort key.



Configure Request Manager Screen

2. Use the **Sequence** text boxes to enter the desired display sequence for the statuses in the **Borrower actions sequence**, **Lender actions sequence**, Borrower **Items awaiting response** and Lender **Items awaiting response** lists.
   - You can enter any number from "**0**" to "**9999**" as a display sequence number.
   - You *must* enter a *unique* display sequence number for *each* status in a given list.

   *If the same display sequence number is used for more than one element, the message "Please check the following errors: Duplicate value" displays at the top of the screen and "Duplicate value" displays next to the duplicate **Sequence** number(s) when you submit your changes.*

   - You can enter display sequence numbers in *numeric order* (1, 2, 3, etc.), or, you can *skip numbers* (10, 20, 30, etc.) to allow for easier re-sequencing of elements.
3. When display sequence numbers have been entered for *all* statuses in each list, click the **Submit** button to save your changes.

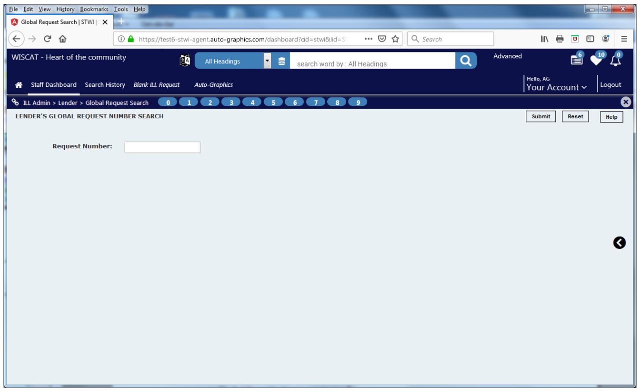
   *You must enter a display sequence number for all included elements. If you do not enter a display sequence number for a given status, the **Sequence** for the status will default to "**0**" when you submit your changes.*

Global Request Search

The **Borrower - Global Request Search** function lets you locate the Full Record Display for a *specific* ILL request submitted by *any library* in a consortium or collective using the *system-assigned* Request Number. The **Lender - Global Request Search** function lets you locate the Full Record Display for a *specific* ILL request received by *any library* in a consortium or collective using the *system-assigned* Request Number.

To perform a Global Request Search:

1. Select **Borrower - Global Request Search** or **Lender - Global Request Search**, as appropriate, from the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details).
   - The selected Global Request Number Search screen displays.



Global Request Number Search Screen

2. Enter the Request Number assigned by the system in the **Request Number** text box. (To clear the contents of the **Request Number** text box, click the **Reset** button.)

   *You must enter a complete **Request Number**.*

3. Click the **Submit** button.
   - If the Global Request Search is *successful*:
     - The Full Record for the request displays.
   - If the Global Request Search is *unsuccessful*:
     - The message "Request Number not found" displays. Click **Go Back** to return to the Global Request Number Search screen.
     - Re-enter the **Request Number**, then click the **Submit** button.

*To prevent issues with ILL Request **History Notes** and other form fields, is strongly recommended that you **do not** make status changes to ILL Requests accessed using **Global Request Search** other than those associated with the library under which you logged in.*

Maintaining Batch Holiday Lists

The **Maintain Batch Holiday Lists** function lets you perform batch updates to the Holiday Lists for multiple selected libraries. This function is intended for use primarily in cases where multiple libraries within a consortium or collective would be closed for a common period of time (such as school vacations) to eliminate the need for updating the **Holiday List** in the Participant Record for each library individually.

To batch update Holiday Lists:

*The **Holiday List** and **Days Requests are Processed** are used so non-business days and holidays are not counted as business days when the system calculates due dates and deadline dates, expiration of **Days to Respond**, etc. Holidays should be entered in the list only when the holiday falls on a business day (a day when the library would normally be open). For example, if the library is not normally open on Sunday, you would not need to enter the Easter holiday in the Holiday List.*

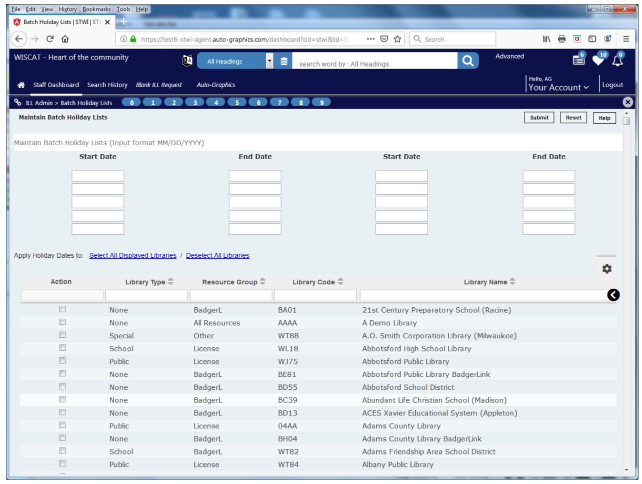
*If a request arrives at a lender that is currently on holiday, and the lender's **Days to Respond** will still be active when the lender returns from holiday (including consideration of **Days Requests are Processed** settings), the request remains in **Pending** status in the lender's Request Manager.*

*If a request arrives at a lender that is currently on holiday, and the lender's **Days to Respond** will expire before the lender returns from holiday (including consideration of **Days Requests are Processed** settings), the lender is "skipped" and the request is forwarded to the next lender in the **Lender List.** The **History** note indicates a date after which the borrower may try again. If a lender is skipped, the request will appear in the **Retry** status if there are no other lenders in the **Lender List**.*

1. From the **ILL Admin** menu (see ***The ILL Admin Menu*** on page **8** for details), select **Maintain Batch Holiday Lists**.

   - The Maintain Batch Holiday Lists screen displays.

- If desired, you can reconfigure, sort and filter table content (see the ***System Basics User Guide*** for details).



Maintain Batch Holiday Lists Screen

2. Enter the dates the libraries will be closed in the list:

   - Enter holidays using the format MM/DD/YYYY, *including* the slashes.

   - Enter the *first day* of the holiday in the **Start Date** text box. Enter the *last day* of the holiday in the **End Date** text box.

   - For single-day holidays, enter the same date in *both* the **Start Date** *and* **End Date** text boxes.

   IMPORTANT! *Do not use dashes, spaces or other non-numeric characters when entering holidays. Do not use alphabetic characters or notations when entering holidays. If an improperly formatted date is entered, an advisory dialog displays the message "Please enter a valid date in "mm/dd/yyyy" format" when you exit the field. Click the* ***OK*** *button to close the message and re-enter the date.*

3. Select the libraries to which the specified holidays will be applied from the **Apply Holiday Dates To** list:

   - The **Apply Holiday Dates To** list is initially sorted by **Library Name**. Click a column head to re-sort the list according to the selected sort key.

   - Use the checkboxes to select the libraries to which the specified holidays will be applied.

     - A *checkmark* indicates the specified holidays *will be* applied to the associated library.

     - An *empty checkbox* indicates the specified holidays *will not be* applied to the associated library.

     - Clicking a checkbox repeatedly will toggle it on and off.

     - Click the **Select All Displayed Libraries** link to select the checkboxes for *all* libraries in the **Apply Holiday Dates To** list.

     - Click the **Deselect All Libraries** link to de-select the checkboxes for *all* libraries in the **Apply Holiday Dates To** list.

4. When all desired libraries have been selected, click the **Submit** button to submit your changes and update the Participant Records for the selected libraries.

   - The screen refreshes, and the message "This action has created overlapping holiday dates for the following libraries" is shown at the bottom of the screen, listing the library code and library name all libraries for which overlapping holidays resulted. The Participant Records for these libraries should be manually updated on an individual basis to correct the conflict.

If you do not select at least one library from the ***Apply Holiday Dates To*** *list, the message "Please select at least one library" displays at the top of the screen. Select the desired libraries, then click the* ***Submit*** *button.*

If you do not enter at least one holiday in the ***Start Date*** *and* ***End Date*** *text boxes, the message "Please enter at least one date" displays at the top of the screen. Enter the desired holiday(s), then click the* ***Submit*** *button.*