

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

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

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

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

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

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

Field	Default	Your Library's Entry
Notes	n/a	
Move Request with Patron Note to Awaiting Approval	Yes	Prefilled
Show Blank ILL Form	Staff	Prefilled
Show Request This Button	Staff, patrons	Prefilled
Show Item Due Date to Patron	Yes	Prefilled
Show Patron Willingness to Pay Message	Yes	Prefilled

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

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

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

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

Field	Default	Your Library's Entry
Display History Information	Newest First	Prefilled
Calculate Renewed To Date	Add to Accept Renewal date	Prefilled
"Any Edition is Acceptable" Checked as default	Yes	Prefilled

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

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

Field	Default	Your Library's Entry
Shipping Label Default	Both Shipped and Returned	Prefilled
Hide patron data on shipping labels	Yes	Prefilled

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

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

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

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

Field	Default	Your Library's Entry
Display [ILL Lender] to Patrons/Guests	No	Prefilled
Allow patrons to change need-by date	Yes	Prefilled
Allow patrons to change pickup location	No	Prefilled
Allow batch request from list	No	Prefilled

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

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

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

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

Field	Default	Your Library's Entry
Set Default Need-by Date	90	
Set Minimum Need-by Date	20	Prefilled
Enable checking for duplicate requests	No	Prefilled
Time Zone Adjustment (in hours)	3	Prefilled

Owned by My Library

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

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

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

ILL Request Form Patron Notices

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

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

Field	Default	Your Library's Entry
Display Disclaimer Notice	Yes	Prefilled
Display ILL Status Notice	No	Prefilled

Contact Info

Address/Contact Information

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

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

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

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

Notes for IDS libraries:

- Include your IDS number; add it either before or after your library name, e.g., Library Name IDS 123
- Include a physical address; IDS uses UPS, which does not ship to PO boxes

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

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

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

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

Field	Default	Your Library's Entry
Contact Type	ILL Contact	System setting
ILL Contact Name		
ILL Contact Title		
ILL Phone Number: General		
ILL Phone Number: Borrowing		
ILL Phone Number: Lending		
ILL Phone Number: Contact		
ILL Email Address		
ILL FAX Number		
Ariel Address	n/a	n/a
ILL Pickup Locations	n/a	n/a
Shipping Options	n/a	n/a

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

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

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

Holiday List

Holiday List

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

- Dates must be entered as MM/DD/YYYY and each period must have a start and end date.
- You may enter dates either across a row or down a column.

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

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

- The system deletes dates from the **Holiday List** once the holiday has passed.
- Indicating that your library is closed for a “holiday” period will prevent your library from receiving requests; it does not affect your ability to place requests.

ISO

External Communications

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

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

Username

Usernames and Passwords

This section is not applicable for Clover libraries.

Related Info

Other Related Information

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

Note: We recommend you leave it as NO so as not to be confusing.

Patron Notices

Patron Notification Set-up and Email Notice Set-up

Information for up to five patron notification messages may be entered.

Staff Notices

Staff Notification Set-up

- If you want email alerts to be received by ILL staff, here is where you configure them.
- Only one email address can be entered.
- Choose which notifications you would like to be sent.
- Notifications are sent *automatically* by the system.

NCIP C-ILL

NCIP C-ILL Communication Parameters

This section is not applicable for Clover.

URL Info

URL Information

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

Lending

Lending Policy

In the **Maintain Lending Policy** chart, indicate your library's lending policy for *each material type* listed to ensure the system checks if your library should receive a request for a specific material type.

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

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

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

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

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

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

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

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

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

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

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

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

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

Fee: Enter the fee amount for each material type for which your library assesses a fee to the borrower.

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

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

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

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

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

- Remember that you may attach a *Conditional* status to requests for specific items and indicate the condition (such as “Library Use Only”) before lending that item.

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

Shipping Policy, ILL Acceptance Policy, and Copies Policy

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

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

Shipping

Shipping Policy

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

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

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

ILL Acceptance

ILL Acceptance Policy

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

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

Copies

Copies Policy

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

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