

## CLOVER: Participant Record

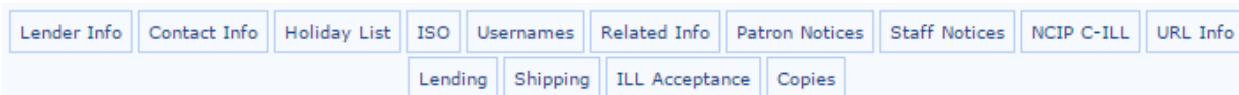
A library's **Participant Record** contains information necessary to ensure the proper handling of interlibrary loan (ILL) activities, including a participant profile, ILL contact information, Preferred Lender List, and ILL policy information.

- You will actually be able to change every setting. But, please, when you see **prefilled**, please don't change. We've thought these through and set them for what we think is the smoothest running of the entire system. Thank you.
- Some of the settings are for libraries allowing patron initiated requests. They will not have any effect on your process if you are mediating your requests. If you eventually take the plunge and let your patrons request without you, the recommended preferences are already set.
- You will notice the Blocked Lenders section. For most of you, this is blank. If you are a CATAMOUNT library, this will be populated by other CATAMOUNT libraries' codes. What this means is that you can continue your current process and request from other CATAMOUNT libraries through the CATAMOUNT network. If no one can fill your request, you can come to Clover. Clover will request from all libraries but CATAMOUNT libraries.
- It is recommended that you keep a record of the library's entries in the Participant Record. Space is provided for that purpose in the charts of each section in this document.

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

- Select **Staff Dashboard**
- Select **ILL Admin**
- Select **Maintain Participant Record**

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



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

- These sections may also be accessed via the links at the bottom of the Participant Record page. Descriptions of each field in the different sections are listed below, followed by a chart listing the field, the default entry (if applicable) and space to record your library's entry.
- The **Field** and **Default** fields for which you are responsible for verifying and updating are in **Bold** in the charts and the **Your Library's Entry** field is blank.
- System-wide defaults that should not be changed are noted as "System setting" in the field for your library's entry. These defaults are set to allow for smooth ILL throughout Vermont.
- Settings that refer to fields not applicable to Clover are noted as "n/a" in the field for your library's entry.

After making any changes to the Participant Record, click the **Submit** button to save the changes.

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

### Lender Info

#### Lender Information

**Library Code:** Your library's ILL code

**Library Name:** Your library's name will be auto-filled but can be changed if necessary. **Agency Code:** Not applicable to Clover

**Broker Code:** Not applicable to Clover

Field	Default	Your Library's Entry
Library Code	your library's ILL code	Prefilled
<b>Library Name</b>	<b>your library's name</b>	Prefilled
Agency Code	n/a	n/a
Broker Code	n/a	n/a

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

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

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

Field	Default	Your Library's Entry
Days to Respond	4	Prefilled
Days to Supply	15(Max. courier transport time)	Prefilled
Days to Return	45(Loan period + transport time)	Prefilled

**Days Requests are Processed:** Check the days ILL requests are processed. You might be open 5 days, but only have ILL staff for 2 days. Please check the 2 days. This is to ensure that requests do not sit in your library's queue for too long.

➤ "Days Requests are Processed" must be checked for requests to be received at the library.

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

**Preferred Lender List:** This is where you list the codes for libraries you would like to borrow from in order of preference. Requests are checked again the libraries in this list first, in order, before proceeding to the entire list of participating libraries.

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

**Primary Default Lender:** VSS is VTLIB's OCLC code. After the system has gone through all possible lenders, the request will come to us and we will borrow from out-of-state.

**Secondary Default Lender:** Not applicable for Clover.

Field	Default	Your Library's Entry
<b>Preferred Lender List</b>		
System Wide	All Access Clover libraries	Prefilled
Primary Default Lender	VSS	Prefilled
Secondary Default Lender	n/a	n/a

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

**Move Request with Patron Note to Awaiting Approval:** Indicates whether requests are sent to the Awaiting Approval status where they are mediated by staff. 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:** This is to let VTLIB know when we request out-of-state.

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:** Not necessary for patrons to know.

**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 date on which an ILL request is submitted to determine the “Need By” date for the request.

**Set Minimum Need-by Date:** Specifies the minimum number of days from the date on which an ILL request is submitted to determine the minimum “Need By” date for that request.

**Enable checking for duplicate requests:** Indicates whether new requests should be checked for duplicates among the current requests submitted by the same user. “No” enables 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 VT.

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:** Indicate whether the Patron Disclaimer Notice will be shown on the ILL Request Form

**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.

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 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
05/13/2016	09/05/2016		

- 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.
- This list might need updating a few times a year.

#### 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

### Username 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 appears during the search results by searching for a library in **Search Library Information** or when you are on the Details page 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:** It's up to you, we've recommend you leave it as NO.

#### Patron Notices

### Patron Notification Set-up and Email Notice Set-up

Information for up to five patron notification messages may be entered which are triggered immediately by a change in the request status. The options are None, Pending, Received, Recalled, Overdue, Returned, Unfilled, Cancelled, Accept Renewal, Reject Renewal, Conditional, Need by date has expired or Retry. The logical fields are prefilled. Libraries can add customized text to each message (Limit of 1,400 characters).

#### Staff Notices

##### Staff Notification Set-up

- If you want ILL staff to receive an e-mail that requests need their attention, here is where you configure them. This is especially useful for libraries that might not be in the practice of checking their Request Manager every day.
- 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								

**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** (we recommend 30 days) 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:** All fee settings must be \$0



**Place Hold:** Your call.

**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.

- Libraries that use the 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			