

# Recommended Default Settings for SRCS Libraries

The following default settings are recommended by the ISL Resource Sharing Committee for all participating SRCS libraries. These settings are managed by the Administrator for each library. If you have questions about any of the recommendations, contact us at [INSRCS@library.IN.gov](mailto:INSRCS@library.IN.gov).

## Staff Dashboard > ILL Admin > Participant Record

### Lender Information

Field	Description	Recommended Default
Library Code	SRCS library code assigned by ISL.	Prefilled
Library Name	The display name of the library.	Prefilled
Library Type	Choose the appropriate option from the dropdown	Local choice
Agency Code	Leave blank	
Broker Code	Leave blank	
Days to Respond	Number of working days that the lending library needs to review and respond to ILL requests in their PENDING queue. See <i>Days Requests are Processed</i> below.	4 days maximum.  This number should <i>never</i> be larger than the number of days that a library checks their PENDING queue.
Ref Request Default	Leave blank	
Days to Supply	Number of calendar days it takes the lending library to send requested material to a borrower. (Average in-transit time)	7 days
Days to Return	This is the default loan period if the LENDING policy page is not filled out and turned on, or if the library is not running NCIP. Number of days (including shipping days) until a borrowed item is due back to the lending library.	40 days  <i>NCIP libraries will not see this, as due dates are determined by your ILS.</i>
Days Requests are Processed	Days of the week on which the lending library processes ILL requests. 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.	Local choice

<b>Preferred Lender List</b>	This editable list contains the list of preferred ILL lenders for each library. Requests are checked again the libraries in this list first, in random order, before proceeding to the entire list of participating libraries.	Libraries within your InfoExpress hub (Shortens delivery time)
<b>System Wide</b>	This is the entire list of participating libraries.	Prefilled
<b>Network Lenders</b>	A listing of the Library Codes (assigned by Auto-Graphics) for the libraries that are members of the participant's network. This field is visible only to systems configured for network handling of ILL requests.	Prefilled <i>Only visible to Evergreen libraries.</i>
<b>Blocked Lenders</b>	This editable list contains the list of libraries to be blocked from automatic addition by the system to the Lender List for an ILL request.	Local choice  <i>For Evergreen libraries, this is prefilled with other Evergreen libraries.</i>
<b>Primary Default Lender</b>	Leave blank	
<b>Secondary Default Lender</b>	Leave blank	
<b>Notes</b>	Additional notes related to library information. This field is visible to library staff only.	Local choice
<b>Move Request with Patron Note to Awaiting Approval</b>	Yes/No button indicates whether requests are forced to the Awaiting Approval status where they must be mediated by the staff before being released.	Local choice
<b>Move Request with Vols Needed Note to Awaiting Approval?</b>	Yes/No button to indicate whether requests that include Volumes needed are forced to Awaiting Approval status.	Local choice
<b>Allow Retry as Borrower</b>	Yes/No button to indicate whether requests for which all lenders provide a response indicating they are not currently able to supply the requested item will go to borrower's Retry status or borrower's Unfilled status. The lender's responses can be supplied either manually (by selecting Will Not Supply and providing a qualifying reason or by selecting Retry) or automatically by the system (in cases where the lender is "on holiday," or where the lender's item is not currently available and "lender skipped,	YES

retry later” is noted in ILL Request History).

<p><b>Automatically resend requests in Retry</b></p> <p>Updated October 2022</p>	<p>Yes/No button to indicate whether requests in Retry status should automatically be updated to Approved - Send by the system a specified number of days after being placed in Retry status. (This option is active ONLY when the Allow Retry as Borrower option is set to Yes. If the Allow Retry as Borrower option is set to No, the Automatically resend requests in Retry option is “read only,” and any previous settings for the option are ignored.)</p>	<p>Local choice</p>										
<p><b>If Yes, resend Retry requests after _____ days</b></p> <p>Updated October 2022</p>	<p>Determines the number of days (from 1 to 30) after being placed in Retry status that a request is automatically placed in Approve-Send status by the system. <i>(This field is shown ONLY when the Automatically resend requests in Retry option is active and is set to Yes.)</i></p>	<p>Local choice</p>										
<p><b>Access ILL Request</b></p> <p>Updated October 2022</p>	<p>Checkboxes to indicate the User Types (Guests, Patrons, Staff, Institutional, etc.) granted access to ILL Request Forms according to the Show Blank ILL Form and Show Request This Button selections. <i>(If the checkbox for a given User Type IS NOT selected, that User Type WILL NOT be granted access to ILL Request Forms regardless of the Show Blank ILL Form and Show Request This Button selections.)</i></p>	<table border="0"> <tr><td>Staff</td><td>YES</td></tr> <tr><td>Patrons</td><td>YES</td></tr> <tr><td>Institutional</td><td>YES</td></tr> <tr><td>Guests</td><td>NO</td></tr> <tr><td>Guests – Require login</td><td>NO</td></tr> </table>	Staff	YES	Patrons	YES	Institutional	YES	Guests	NO	Guests – Require login	NO
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<p><b>Show Blank ILL Form</b></p>	<p>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.). <i>(If the checkbox for a given User Type IS selected, but the Access ILL Request checkbox for the User Type IS NOT selected, the Blank ILL Form WILL NOT be available for the User Type.)</i></p>	<p>Staff only (Optional)</p>										
<p><b>Show Request This Button</b></p>	<p>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.). <i>(If the checkbox for a given User Type IS selected, but the Access ILL Request checkbox for the User Type IS NOT selected, the Request This Item button WILL NOT be available for the User Type.)</i></p>	<table border="0"> <tr><td>Staff</td><td>YES</td></tr> <tr><td>Patrons</td><td>YES</td></tr> <tr><td>Institutional</td><td>YES</td></tr> <tr><td>Guests</td><td>NO</td></tr> <tr><td>Guests – Require login</td><td>NO</td></tr> </table>	Staff	YES	Patrons	YES	Institutional	YES	Guests	NO	Guests – Require login	NO
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<p><b>Show Availability to</b></p>	<p>Allows selected user types to see item availability information.</p>	<p>Local choice</p>										
<p><b>Uses Mediated Patron Renewal</b></p>	<p>All patron requests for renewals are staff-mediated – this setting refers to whether patrons are allowed to request a renewal from their account.</p>	<p>Local choice</p>										

	If Yes, the patron will see the “Renew” option in their account.	
<b>Show Item Due Date to Patron</b>	Yes/No button to indicate whether the due date is displayed to the patron on the ILL Request Tracking screen.	YES
<b>Patron’s due date is ___ days prior to lender's due date</b>	<p>This feature subtracts the specified number of days from the lender’s due date shown and displays this date to the patron.</p> <p>It is an artifact of the old ILL Code. According to the 2016 revision, the due date assigned by the lending library is the date that the patron is due to return the item.</p> <p>This field is available only if the Show Item Due Date to Patron option has been set to Yes.</p>	0 (ZERO)
<b>Use Holiday List in Calculating Patron's Due Date</b>	<p>Yes/No button to indicate whether library holidays are considered when calculating the patron's due date.</p> <p>This field is available only if the Show Item Due Date to Patron option has been set to Yes.</p>	YES
<b>Show Patron Willingness to Pay Message</b>	Yes/No button to indicate whether the “patron willingness to pay” message appears on the patron ILL Request Forms. Since SRCS is a free service within the state, this should be set to NO.	NO
<b>Patron’s Payment Options</b>	<p>Lists all patron payment options.</p> <p>This field is available only if the Show Patron Willingness To Pay Message option has been set to Yes.</p>	This field is not used in SRCS.
<b>Blank Request – Disable NCIP Function</b>	<p>Yes/No button to indicate whether NCIP messaging is disabled for ILL requests originated using the Blank Request Form.</p> <p>Note that this function is controlled by the Participant Record of the library updating the request.</p>	NO
<b>Blank Request – Disable Availability</b>	Yes/No button to indicate whether availability checking is disabled for ILL requests originated using the Blank Request Form.	NO
<b>Send Blank ILL</b>	Determines the status in which Blank ILL Requests	Local choice – should be

<b>Request without Lender List To:</b>	(created by library patrons) that do not include at least one lender in the Lender List will be placed; either Awaiting Approval or ILL Review.	irrelevant if only staff are allowed to use the Blank Request Form
<i>Updated October 2022</i>		
<b>Display History Information</b>	Determines the order in which history information is shown in the ILL Request Full Record Displays; either Oldest First or Newest First.	Local Choice
<b>Calculate Renewed To Date</b>	Determines how the system calculates the renewed due date; either Add to original due date or Add to Accept Renewal date.	Add to Accept Renewal date
<b>Any Edition is Acceptable</b>	Determines whether the “Any Edition is Acceptable” checkbox on the ILL Request Form is selected by default.	Local Choice
<b>Customer Field 6 on Request Form Checked as default</b>	Determines whether the Customer Field 6 checkbox on the ILL Request Form and Blank Request Form is selected by default.	Local Choice
<b>Shipping Label Default</b>	Determines the default display on the Maintain Shipping Labels screen; either Shipped Status Only or Both Shipped and Returned. Users can change this display at will.	Shipped Status Only
<b>Hide patron data on shipping labels</b>	Indicates whether patron data is included on printed shipping labels.	YES
<b>Show Patron Note to Lenders</b>	Indicates 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.	Local Choice
<b>Display [ILL Lender] to Patrons/Guests</b>	Indicates whether the “ILL Lender” is displayed next to the library name on the Where to Find It section on the Detailed Record screen.	Local Choice
<b>Allow patrons to change need by date</b>	Allows patrons to change the Need By Date when preparing and submitting ILL requests.	YES
<b>Allow patrons to change pickup location</b>	Allows patrons to change their Pickup Location when preparing and submitting ILL requests.	Local choice <i>Note: this feature may not work with NCIP</i>
<b>Allow patrons to place requests from lists</b>	Indicates whether creation of ILL requests by patrons from titles saved to a list is allowed.	Local choice

<b>Number of copies default – Multi Copy Form</b>	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.	Leave blank, to prompt for number of copies needed
<b>Number of copies default – Blank Request Form</b>	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.	Leave blank or set at 1 because most likely a request placed on a blank form will not be for multiple copies
<b>Number of lenders to print per request</b>  <i>Updated October 2022</i>	Specifies the number of lenders to be included on printed requests when printed from a Status Browse List using the Print All – With Lenders printing option, or when printed from a Full Record Display. The default value is 5 lenders.	Local choice
<b>Set Default Need-by Date</b>	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. The default value is 90 days.	90 days
<b>Set Minimum Need-by Date</b>	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.	14 days
<b>Enable checking for duplicate requests</b>	Indicates whether new requests should be checked for duplicate among the current requests submitted by the same user.	YES
<b>Time Zone Adjustment (in hours)</b>	Specifies the number of hours difference between your library’s time zone and the Pacific Time Zone, where the SRCS Servers are located. This corrects the time stamps on all reports.	3 (EST) 2 (CST)

### Owned by My Library

<b>Field</b>	<b>Description</b>	<b>Recommended Default</b>
<b>Show Owned by This Library Notification Message</b>	Yes/No button to choose whether to display a message if the patron’s home library owns this item.	YES
<b>Enable Network Availability Checking</b>	Indicates whether network availability checking for ILL requests is enabled. This field is applicable only to systems configured for network handling of ILL requests.	YES  <i>Only visible to Evergreen libraries.</i>
<b>Handling Method if</b>	Determines the handling method in cases where	Pass to Record in Catalog,

<b>Local System Owns</b>	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	Place HOLD in Evergreen  <i>Only visible to Evergreen libraries, and the recommendation should be prefilled.</i>
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**ILL Request Form Patron Notices**

<b>Field</b>	<b>Description</b>	<b>Recommended Default</b>
<b>Display Disclaimer Notice to Patrons</b>	The Patron Disclaimer Notice allows you to add a locally-defined message or “disclaimer” note for display to patrons when submitting an ILL request.  Indicates whether the Patron Disclaimer Notice will be shown on the ILL Request Form	NO
<b>Display ILL Status Notice</b>	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.  Indicates whether the ILL Status Notice will be shown on the ILL Request Form.	NO

**Address/Contact Information**

<b>Field</b>	<b>Description</b>	<b>Recommended Default</b>
<b>Address 1</b>	Checkbox allows patron to view address and contact information for the library.  Use the fields to enter the address for your library.	Checked
<b>Ship to Name</b>	Checkbox allows patron to view address and contact information for the library.  Use the fields to enter the address for your library.	Checked
<b>Route Schedule</b>	Enter your library’s InfoExpress service days in this field (example: M, T, W, R, F). This information will display on the Shipping Label.	Checked
<b>Contact 1, 2, 3</b>	Enter contact information for up to three contact people for your library. Options include ILL	Local choice, but at least one contact is required.

Contact, Director, Billing, Technical or Other.

## Holiday List

Field	Description	Recommended Default
<b>Holiday List</b>	Enter your library's holidays and closed dates. Do not include standard closed days, i.e.—Closed every Sunday. Enter dates in MM/DD/YYYY format. For each period, enter the start date and the closed date. They do not need to be added in order. As dates pass, they will fall off the list.  <b>IMPORTANT NOTE: This section needs to be updated at least twice a year.</b>	Local choice
<b>Display To Patron</b>	If checked, allows patrons to see your library's holidays and closed dates.	YES

## External Communications + Usernames and Passwords

These sections deal with the setup of a link between SRCS and ILLiad, Tipasa or other ISO compatible systems. As a rule, they can be left blank. Interested libraries should contact the SRCS Coordinator at [INSRCS@library.IN.gov](mailto:INSRCS@library.IN.gov) to discuss how to set this up.

## Other Related Information

These fields are optional. If the boxes are checked, these fields will be displayed to patrons. All content is locally determined.

## Patron Notification Set-up

SRCS allows each library to customize up to five patron notification messages 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 Expired or Retry.

For each message, the logical fields are prefilled. Libraries can add customized text to each message (Limit of 1,400 characters).

## EMail Notice Set-up

Field	Description	Example
<b>EMail Notice Subject</b>	Each library can specify the subject line for notices sent to patrons	SRCS Request Status Update
<b>EMail Notice From Name</b>	Each library can specify the sender's name for the notices sent to patrons	ABC Public Library SRCS



<b>EEmail Notice From Address</b>	All notices must be sent using the email <a href="mailto:no-reply@librarycard.com">no-reply@librarycard.com</a> . Anything else may be blocked as spam.
<b>CC EMail Address (optional)</b>	Each library can send copies of all messages to a local email. This can be very useful during testing, but may want to be turned off after you go into production.

## Staff Notification Set-up

Library staff can also receive notices to alert them that either borrowing or lending requests need their attention. This is a valuable service for the smaller libraries who are not in the practice of checking their Request Manager daily.

For each message, the logical fields are prefilled. Libraries can add customized text to each message (Limit of 1,400 characters).

## NCIP C-ILL Communication Parameters

This section is only used if your library is running NCIP. Contact [INSRCS@library.IN.gov](mailto:INSRCS@library.IN.gov) for assistance with setup.

## SSO

This section is used for configuration for connecting to single sign-on sources. If your library is interested, contact [INSRCS@library.IN.gov](mailto:INSRCS@library.IN.gov) for more information.

## URL Information

This section allows your library to display local policy and informational websites to the patrons. If the boxes are checked, these fields will be displayed to patrons. All content is locally determined. The use of this section is optional.

## Lending Policy

Lending policies define the policies and fees associated with lending your library's materials through SRCS. When enabled, these lending policies are used to determine due dates for items supplied through SRCS for selected material types only.

Further control on what items are lendable or not lendable is available for libraries using Z39.50, by providing a spreadsheet listing all of your catalog's shelving locations and an indication as to whether items in that location are lendable in SRCS or not. Contact [INSRCS@library.IN.gov](mailto:INSRCS@library.IN.gov) for more information.

Note: The Lending Policy and the shelving locations work in tandem as SRCS compiles a lender list.

1. SRCS first checks the Z map (shelf locations). If a location is not lendable, the library is skipped.
2. If the location is lendable, SRCS looks at the Lending Policy. If it's being used, the format is checked to see if it's lendable. If it's not lendable, the library is skipped.
3. If both the location and format are lendable, then SRCS checks to see if it's available. If not, the library is skipped; if it's available, the library gets the request.

<b>Field</b>	<b>Description</b>	<b>Recommended Default</b>
<b>Use my library's lending policies to determine if my library should receive requests of specific item types</b>	<p>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.</p> <p>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.</p>	The lending policy is used in tandem with configuring your Z39.50 source locations.
<b>Loan</b>	Is this item type loanable? Answer YES, NO, or Not Applicable.	Local choice
<b>Loan Period (days)</b>	What is the loan period for this item type, expressed in days?	<p>If you indicate a value other than zero, the system uses the specified value to override the Days to Return value from the Participant Record.</p> <p>If you leave the Loan Period as 0, the system will determine the due date using the Days to Return value.</p>
<b>Renew</b>	Is this item type renewable? Answer YES, NO, or Not Applicable.	<p>Local choice</p> <p>Note: Evergreen NCIP does not currently support renewals, so in order to prevent NCIP errors, Evergreen libraries should have all renewals set to NO.</p>
<b>Renewal Loan Period (days)</b>	What is the renewal period for this item type, expressed in days?	For most items, the recommended minimum is same as the original loan.
<b>Exceptions, Comments</b>	Brief comments or policy exceptions may be included for each material type (limited to 300 characters)	Local choice

## Borrowing Policy

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.

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.

## Shipping Policy

The Shipping policies screen defines the authorized methods for shipping materials for SRCS. Shipping Methods Materials for US Mail, UPS and Express Mail can be left blank and marked NO. For Other, enter InfoExpress in the blank, and select YES from the dropdown.

## ILL Acceptance Policy

ILL acceptance policies define the authorized methods that your library will accept for interlibrary loan requests coming from outside SRCS. Completion of this section is optional.

## Copies Policy

Copies policies define your library's policies for providing copies of various types of media.

If you do not want to provide copies, you may leave these settings blank.

If you choose to offer copies, 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. For each media type listed, enter your library's reproduction policy in the Photocopy, FAX, and ARIEL, Email, Other text boxes. When copies policies have been entered for all listed media types, click the Submit button to submit your changes to copies policies.

## Staff Dashboard > ILL Admin > ILL Request Limits:

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 SRCS requests allowed for a patron category. Separate limits may be specified for each Patron Category.

When an ILL Request Limit is reached, an "over limit" message displays when the patron submits an additional ILL request. Patron Categories are created, maintained and assigned to users through the User Administration module.

To create ILL request limits:

1. Select the limits option: number active, per week, or per month.
2. For each patron category, select either No Limit or uncheck the box and enter a whole number.

Recommended Defaults:

- ILL Clerk      No limit
- Patron          20