

## Recommended Default Settings for SRCS Libraries

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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.

### **Staff Dashboard/ILL Admin/Maintain Participant Record:**

#### **Lender Information:**

Library Code SRCS library code assigned by ISL. (Prefilled)

Library Name The display name of the library. (Prefilled)

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 *Days Requests are Processed* below.

**Recommended Default: 4 days maximum.**

**This number should *never* be larger than the number of days that a library checks their PENDING queue.**

Days to Supply Number of calendar days it takes the lending library to send requested material to a borrower. (Average in-transit time)

**Recommended Default: 7 days**

Days to Return **Correction: This is the default loan period if the LENDING policy page is not filled out and turned on. Number of days (including shipping days) until a borrowed item is due back to the lending library.**

**Recommended Default: 40 days**

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.

Preferred Lender This editable list contain the list of preferred ILL lenders for each library, 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.

**Recommended Default: Libraries within your InfoExpress hub (Shortens delivery time)**

System Wide This is the entire list of participating libraries. (Pre-filled).

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ISSI Participant    Leave Blank

Primary Default Lender        **Leave Blank**

Secondary Default Lender        Leave Blank

Move Request with Patron Note to Awaiting Approval Yes/No button indicates whether requests are forced to the Awaiting Approval status where they must be mediated by the staff before being released. SRCS, by design, is intended to be a non-mediated system, so this should be set to NO.

**Recommended Default:    NO**

Show Blank ILL Form    Displays link to a Blank ILL Request form to selected user types.

**Recommended Default:    Staff only (Optional)**

Show Request This Button        Allows selected user types to place requests from within SRCS.

**Recommended Default:**

<b>Staff</b>	<b>YES</b>
<b>Patrons</b>	<b>YES</b>
<b>Institutional</b>	<b>YES</b>
<b>Guests</b>	<b>NO</b>
<b>Guests – Require login</b>	<b>YES</b>

Show Item Due Date to Patron    Yes/No button indicate whether the due date is displayed to the patron on the ILL Request Tracking screen.

**Recommended Default:    YES**

Show Patron Willingness to Pay Message    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.

**Recommended Default:    NO**

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Patrons due date is \_\_\_ days prior to lender's due date This feature subtracts the specified number of days from the lender's due date shown and displays this date to the patron. 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. (This field is available only if the Show Item Due Date to Patron option has been set to Yes.)

**Recommended Default: 0 (Zero)**

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.)

**Recommended Default: YES**

Patron's Payment Options Lists all patron payment options. This field is not used in SRCS. (This field is available only if the Show Patron Willingness To Pay Message option has been set to Yes.)

**Recommended Default: NO**

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

**Recommended Default: (Local Choice)**

Calculate Renewed To Date Determines how the system calculates the renewed due date; either Add to original due date or Add to Accept Renewal date.

**Recommended Default: Add to Accept Renewal date**

Any Edition is Acceptable Determines whether the "Any Edition is Acceptable" checkbox on the ILL Request Form is selected by default.

**Recommended Default: (Local Choice)**

Shipping Label Default: 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.

**Recommended Default: Shipped Status Only**

Hide patron data on shipping labels Indicates whether patron data is included on printed shipping labels. According to the new ILL Code, this is a privacy issue.

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**Recommended Default: YES**

Display [ILL Lender] to Patrons/Guests Indicates whether the ILL Lender is displayed in ILL Request Tracking screen.

**Recommended Default: (Local Choice)**

Allow patrons to change need by date Allows patrons to change the Need By Date when preparing and submitting ILL requests.

**Recommended Default: YES**

Allow patrons to change pickup location Allows patrons to change their Pickup Location when preparing and submitting ILL requests.

**Recommended Default: NO\***

*\* We are recommending defaulting this to NO during the Phase I implementation. This issue will be revisited in 2017 after we have some experience with the system.*

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. The default value is 90 days.

**Recommended Default: 90 days**

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.

**Recommended Default: 14 days**

Enable checking for duplicate requests Indicates whether new requests should be checked for duplicate among the current requests submitted by the same user.

**Recommended Default: YES**

Time Zone Adjustment (in hours) 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.

**Recommended Default: 3 (EST)  
2 (CST)**

Owned by My Library Shows the “Owned by This Library Notification Message” if the patrons home library owned this item. (This button is available only if the library has enabled the optional “Owned by This Library Notification”

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feature.)

**Recommended Default: 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

**Recommended Default: NO**

Display ILL Status Notice Indicates whether the ILL Status Notice will be shown on the ILL Request Form.

**Recommended Default: NO**

### Address/Contact Information

Display To Patron Allows patron to view Address and contact information for the library.

**Recommended Default: YES**

[Use the fields to enter the mailing address for your library]

Route Schedule: Enter your library's InfoExpress service days in this field (example: M, T, W, R, F). This information will display on the Shipping Label.

**Recommended Default: [Enter InfoExpress Service Days]**

Contact 1, 2, & 3 Enter contact information for up to three contact people for your library, i.e. – ILL Contact, Director, Billing, Technical or Other.

### Holiday List

Display To Patron Allows patron to your library's holidays and closed dates.

**Recommended Default: YES**

Holiday List 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.

**IMPORTANT NOTE:  
This section needs to be updated at least twice a year.**

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### External Communications Usernames and Passwords

[These sections deal with the setup of a link between SRCS and ILLiad or other ISO compatible systems. As a rule they can be left blank. Interested libraries should contact Steven Schmidt at [steschmidt@library.in.gov](mailto:steschmidt@library.in.gov) after September 1, to discuss how to get this set up for their library.]

### Other Related Information

Display To Patron            Allows patron to view brief information about your library.

**Recommended Default:**    **YES**

### 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 date has 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

EMail Notice Subject:            Each library can specify the subject line for notices sent to patrons, i.e. -- SRCS Request Status Update.

EMail Notice From Name:        Each library can specify the sender's name for the notices sent to patrons, i.e. – ABC Public Library SRCS.

EMail Notice From Address:      All notices must be send using the email. Anything else may be blocked as spam.

**Recommended Default:**    [no-reply@librarycard.com](mailto:no-reply@librarycard.com)

CC EMail Address (optional):      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.

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### **Borrower emails**

Do you want email notification for NEW Awaiting Approval requests only?

Since SRCS is intended as a non-mediated system, this question should default to NO.

**Recommended Default: NO**

Email notification address: Enter the email address where the notification should be sent.

E-Mail Text: The basic fields are prefilled. Each library can customize the text to fit their needs. (Limit of 1,400 characters).

Do you want email notification for ALL borrowing status changes?

This sends a notification to a local email everything a status is changed on any of your library's borrowing requests.

**Recommended Default: NO**

Email notification address: Enter the email address where the notification should be sent.

E-Mail Text: The basic fields are prefilled. Each library can customize the text to fit their needs. (Limit of 1,400 characters).

### **Lender emails**

Do you want email notification for NEW lending requests only?

This is useful for smaller libraries who are not in the habit of checking the Request manager daily.

**Recommended Default: YES**

Email notification address: Enter the email address where the notification should be sent.

E-Mail Text: The basic fields are prefilled. Each library can customize the text to fit their needs. (Limit of 1,400 characters).

Do you want email notification for ALL lending status changes?

This sends a notification to a local email everything a status is changed on any of your library's lending requests.

**Recommended Default: NO**

Email notification address: Enter the email address where the notification should be sent.

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E-Mail Text: The basic fields are prefilled. Each library can customize the text to fit their needs. (Limit of 1,400 characters).

### **NCIP C-ILL Communication Parameters**

[This section is only used if your library is running NCIP. Contact Auto-Graphics for assistance on setup.]

### **URL Information**

This section allows your library to display local policy and informational webpages to the patrons. The use of this section is optional.

Display To Patron Allows patron to view brief information about your library.

**Recommended Default: YES**

### **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 provided by sending 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 [SteSchmidt@library.in.gov](mailto:SteSchmidt@library.in.gov) for more information.

Use my library's lending policies to determine if my library should receive requests of specific item types.

Checking this box will cause the settings entered below to be used to determine the item types (based upon their MARC cataloging record) and loan period.

Item Type For each of the listed MARC record item types, please give the following information:

Lend Is this item type loanable? Answer YES, NO, or Not Applicable.

Loan Period (days) What is the loan period for this item type, expressed in days? For most items, the recommended minimum is 21 days. Exceptions are permitted for special formats.

**Recommended Default: 21 days**

Renew Is this item type renewable? Answer YES, NO, or Not Applicable.

Renewal Loan Period (days) What is the renewal period for this item type,

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expressed in days? For most items, the recommended minimum is same as the original loan.

Fee (\$) Libraries may not charge for SRCS services. All fee settings must be \$0.

**Recommended Default: \$0**

Place Hold This feature is not available in SRCS at this time.

**Recommended Default: NO**

Make Copies SRCS is intended for returnable items only. All setting should be set to No.

**Recommended Default: NO**

Exceptions, Comments Brief comments or policy exceptions may be included for each material type (limited to 300 characters)

### 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.

Other Enter InfoExpress in the blank, and select YES.

### ILL Acceptance Policy

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

### Copies Policy

SRCS is intended for returnable items only. All setting on this page should be left blank.

### **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.

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Select the time period

Week, Month, Quarter or Year

For each patron category

Select either No Limit or uncheck the box and enter a whole number.

**Recommended Default (ILL Clerk):**      **No Limit**

**Recommended Default (Patron):**      **20**