

Maintain Participant Record

Good morning. This session deals with the Maintain Participant Record fields in SRCS. This session is intended for the person with the highest administrative authorization for your library in SRCS.

Start by logging in as this top level administrator. You can tell that you have logged in as a staff or administrator because you can see the link for the Staff Dashboard.

Click on the link for the Staff Dashboard. Remember, SRCS has been optimized for mobile devices, so the arrangement of these columns will vary based upon the size and type of device you are using.

Locate the ILL Admin column, and then find Maintain Participant Record about half way down that column and select it.

Maintain Participant Record

- Library Code SRCS library code assigned by ISL. (Do not change)
- Library Name The display name of the library. (Do not change)
- Agency Code Leave Blank
- Broker Code Leave Blank
- Days to Respond This is the number of working days that the lending library has to review and respond to ILL requests in their PENDING queue. The recommendation of the Resource Sharing Committee is recommending a maximum of 4 days, and the this number should never be larger than the number of days that a library checks their PENDING queue.
- Days to Supply This is the average number of calendar days it takes the lending library to send requested material to a borrower (Average in-transit time). Since everyone is using InfoExpress, the recommended default of 7 days is reasonable.
- Days to Return This is a correction to what was previously communicated. This is the default loan period, including in-transit days, if the LENDING policy page is not filled out and turned on. The recommended default is 40 days.
- Days Requests are Processed These checkboxes indicate the days of the week that the lending library processes ILL requests in their PENDING file. 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 preferred ILL lenders for each library, in the order of preference. Requests are checked again the libraries in this list first, in order, before proceeding to the entire list of participating libraries. We are recommending libraries use their favored libraries from within your InfoExpress hub to shorten delivery time.
- System Wide This is the entire list of participating libraries. (Pre-filled).
- Primary Default Lender Leave Blank
- Secondary Default Lender Leave Blank
- Move Request with Patron Note to Awaiting Approval This 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.

- **Show Blank ILL Form** This shows a link to a Blank ILL Request form to selected user types. This is optional, but the recommendation is for Staff only.
- **Show **Request This Button**** Allows selected user types to place requests from within SRCS. If this is not checked for a particular patron type, then they will never be able to place requests. Recommended Default of YES for Staff, Patrons & Institutional (multi-user staff accounts). Guests should be set to NO. Guests – Require login is optional.
- **Show Item Due Date to Patron** 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** This displays the “patron willingness to pay” message appears on the Request Forms. Since SRCS is a free service within the state, this should be set to NO.
- **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** Indicates 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** This field is not used in SRCS.
- **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. Local Choice on this setting.
- **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. Recommended Default: YES.
- **Display [ILL Lender] to Patrons/Guests** Indicates whether the ILL Lender is displayed in ILL Request Tracking screen. Recommended Default: Yes.
- **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 recommended default value is 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) or 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” feature.) Recommended Default: YES.
- ILL Request Form Patron Notices (Display Disclaimer Notices & Display ILL Status Notice) are not used in SRCS. Recommended Default: NO to both.
- Address/Contact Information SRCS offers a number of optional fields where you can display your library’s information to the public. These fields are optional.
- 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.
- 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 steschmidt@library.in.gov after September 1, to discuss how to get this set up for their library.]
- Other Related Information allows patron to view brief information about your library. Optional.
- 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 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 no-reply@librarycard.com. Anything else may be blocked as spam.

- 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.
- 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.
- 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
- 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, at least initially.
- 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
- 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 This optional section allows patron to view brief information about your library.

Lending Policy Window

- 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 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, 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.
- **Place Hold** This feature is not available in SRCS at this time. Default: NO
- **Make Copies** SRCS is intended for returnable items only. All setting should be set to No.

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. Recommend setting Other to InfoExpress, 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 by your SRCS administrator.
- 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

Questions from Chat:

- “Logged in as sys admin but don’t have a submit button for this page”
 - Usually this happens when you are not logged in as the top level administrator for your library. It also can happen if your library is running NCIP.

- We don't have "Days to return" on our participant record.
 - Libraries running NCIP may not see this field, because an NCIP setting may override it.
- For libraries allowing items from branches to circ via SRCS, is having 4 "Days to Respond" enough time to have the item shipped to the ILL processing location and prepped for shipping?
 - Your best bet would be to change the status to Will Supply / In Process to avoid having the request go to the next potential lender.
- How long does an item sit in "Will Supply"?
 - Items can stay in this status until the Need By Date expires. Ideally, should be moved to SHIPPED.
- It would be great if there were a document that list all the fields we can pull from the database/request to the email templates. Due date would be useful.
 - There is a list of these fields, however they are currently hard-wired into the program, so it is not useful at this point. This is on the list of possible future enhancements.
- Can we place more than one email in the staff notice field?
 - Yes. Separate with a comma.
- Is there a way to print these pages out for our records?
 - Yes. Screen print, Cntl-P all work.
- How do you add a patron category?
 - The admin can use the Patron Category under User Admin to create categories.
- I do not have the add a category button.
 - Make sure you are logged in as the highest admin level. Also, libraries running NCIP may not see this field, because an NCIP setting may override it
- Does that add a category when you 'Add a User'?
 - No, the categories must be selected when the patrons are created.
- Is there a way to block a particular library card/patron if necessary?
 - Under Edit a User. Change status to Disable
- Is it possible to load patrons?
 - Yes. Using a comma delimited file. Contact me off-line if you want details.
- For SIP2 libraries, what does SRCS look at for determining ILL borrow limits?
 - Unsure. Still trying to find out.

- You discussed a method to limit staff access to a submit button for the Maintain Participant Record page, which is great. Is there a similar way to limit staff access to the various User Admin features? For example, I do not want staff to use the "Global User Permissions" feature, but staff should be able to add or edit single user accounts. How granular can access be set?
 - Abilities in SRCS are determined by the rights the user has. This is set when the user account is created. Right now, I do not think that we have the granular level of control that you are asking for, but we are checking.

- What was the default email address - library card something . . .
 - For the email notices it is no-reply@librarycard.com