

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.

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
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

Preferred Lender List	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)
System Wide	This is the entire list of participating libraries.	Prefilled
Blocked Lenders	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>
Primary Default Lender	Leave blank	
Secondary Default Lender	Leave blank	
Notes	Additional notes related to library information. This field is visible to library staff only.	Local choice
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 is intended to be a non-mediated system, so this should be set to NO.
Move Request with Vols Needed Note to Awaiting Approval?	Yes/No button to indicate whether requests that include Volumes needed are forced to Awaiting Approval status.	SRCS is intended to be a non-mediated system, so this should be set to NO.
Show Blank ILL Form	Displays link to a Blank ILL Request form to selected user types.	Staff only (Optional)
Show Request This Button	Allows selected user types to place requests from within SRCS.	Staff YES Patrons YES Institutional YES Guests NO Guests – Require login NO
Show Availability to	Allows selected user types to see item availability information.	Local choice
Uses Mediated Patron Renewal	Yes/No button to indicate whether the library has enabled mediated patron renewal functionality on the patron ILL request tracking screen.	SRCS is intended to be a non-mediated system, so this should be set to NO.
Show Item Due Date to Patron	Yes/No button to indicate whether the due date is displayed to the patron on the ILL Request	YES

	Tracking screen.	
Patron's 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.	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.	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.	NO
Patron's Payment Options	Lists all patron payment options. This field is available only if the Show Patron Willingness To Pay Message option has been set to Yes.	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
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.	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.	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.	Shipped Status Only
Display [ILL Lender]	Indicates whether the "ILL Lender" is displayed	Local Choice

to Patrons/Guests next to the library name on the Where to Find It section on the Detailed Record screen.

Allow patrons to change need by date	Allows patrons to change the Need By Date when preparing and submitting ILL requests.	YES
Allow patrons to change pickup location	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>
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.	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.	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.	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.	3 (EST) 2 (CST)

Owned by My Library

Field	Description	Recommended Default
Show Owned by This Library Notification Message	Yes/No button to choose whether to display a message if the patron’s home library owns this item.	YES

ILL Request Form Patron Notices

Field	Description	Recommended Default
Display Disclaimer Notice to Patrons	The Patron Disclaimer Notice allows you to add a locally-defined message or “disclaimer” note for display to patrons when submitting an ILL request.	NO

Indicates whether the Patron Disclaimer Notice will be shown on the ILL Request Form

Display ILL Status Notice 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. NO

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

Address/Contact Information

Field	Description	Recommended Default
-------	-------------	---------------------

Address 1	Checkbox allows patron to view address and contact information for the library. Use the fields to enter the address for your library.	Checked
------------------	--	---------

Ship to Name	Checkbox allows patron to view address and contact information for the library. Use the fields to enter the address for your library.	Checked
---------------------	--	---------

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.	Checked
-----------------------	--	---------

Contact 1, 2, 3	Enter contact information for up to three contact people for your library. Options include ILL Contact, Director, Billing, Technical or Other.	Local choice, but at least one contact is required.
------------------------	--	---

Holiday List

Field	Description	Recommended Default
-------	-------------	---------------------

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.	Local choice
---------------------	--	--------------

Display To Patron 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 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 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 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

Field	Description	Example
Email Notice Subject	Each library can specify the subject line for notices sent to patrons	SRCS Request Status Update
Email Notice From Name	Each library can specify the sender’s name for the notices sent to patrons	ABC Public Library SRCS
Email Notice From Address	All notices must be sent 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.

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 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 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 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 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.

Field	Description	Recommended Default
Use my library's lending policies to determine if my library should receive requests of specific item types	<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"</p>	The lending policy is used in tandem with configuring your Z39.50 source locations.

	option is not selected, your library remains in the Lender List.	
Lend	Is this item type loanable? Answer YES, NO, or Not Applicable.	Local choice
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.
Renew	Is this item type renewable? Answer YES, NO, or Not Applicable.	Local choice Note: Evergreen NCIP does not currently support renewals, so in order to prevent NCIP errors, Evergreen libraries should have all renewals set to NO.
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 (\$)	N/A - 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.	NO
Make Copies	Indicates whether you will make copies from the material type.	Local choice
Exceptions, Comments	Brief comments or policy exceptions may be included for each material type (limited to 300 characters)	Local choice

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 out-side 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 (and make sure the "make copies" column is set to no for all formats in your lending policy).

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