Access PA SHAREit ILL Admin: Placing and Fulfilling Requests

You must be logged into your library's Access PA SHAREit account to perform ILL procedures.
➢ The default opening page is the **Staff Dashboard**. To initiate searches, the simple search box and Other Searches menu are available at the top of every page in SHAREit.

Placing Requests

ILL requests can be placed from the search results screen and when viewing the full record.

On the **Search Results** screen, hover the cursor over the cover art and select **Request This Item**.
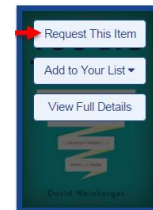
On the full record screen, the **Request This Item** button is in the upper-right when viewing the **Details**:

When viewing **Where To Find It** or the **MARC Display**, the **Request This Item** button is displayed at the top of the screen:
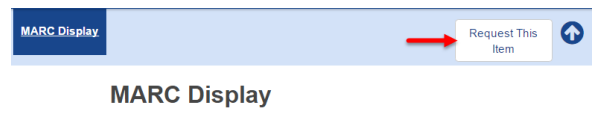
Select **Request This Item** to open the **ILL Request** form.

When placing a request for an item owned by your library, a pop-up window called **ILL Message** displays "The item you're requesting is owned by your library. Please check on its availability before submitting this request."
➢ Select **OK** to close the window and complete the ILL Request form.
➢ The Request will go into **Awaiting Approval** status.

Select **Where To Find It** to see if **My Library** is an owning library:

Using the ILL Request Form

The **ILL Request Form** lets you prepare and submit requests from a specific bibliographic record.

Your library's information as the Borrower and the item's bibliographic information are auto-filled.

The **Request Type Options** field will be set depending on the material being requested. **Returnable (loan)** is the default for most items such as books, audiobooks, and DVDs. **Non-returnable (copy)** is the default for article requests. Note that requests set to Non-returnable (copy) will be marked Complete as soon as the Received action is performed.

Required fields (in red) must be completed.

*Need by: preset to 90 days but may be changed as needed for specific requests. The default can be changed in the Participant Record.

*Patron's Last Name: you may enter a name or a generic term such as "patron" if desired; this information is not visible to potential lenders.

Patron Lookup is not active in Access PA as patron data is not loaded into SHAREit.

*Patron's Contact 1: you may enter contact information or a generic term if desired; this information is not visible to potential lenders.

Borrower's Notes can include specific requests or information for potential lenders.

*Ship to fields (not shown) will be auto-filled with your library's information.

Select the **Submit** button to process the request.

A confirmation appears at the top of the ILL Request form. Click the **X** in the upper right to close the window, or print a copy of the request then close the window.

Note: Requests for items owned by your library, except multi-copy requests, are automatically placed in the status of **Awaiting Approval**.

Placing Multi-Copy Requests

To request multiple copies of a "returnable" item:

1. Locate the item for which multiple copies are needed.

2. Click on the cover art to open the full record.

3. Select **Multi-Copy** under **Staff Functions** on the right to open the ILL Request form.
   - A message will display at the top of the form as the system searches for potential lenders. After the lender list is built, the message will indicate that 1 target (the Access PA union catalog) has responded and will show the number of potential lenders (up to 150) for the title.

4. Complete all required fields. The list of potential lenders is displayed after the ***Need** by field.

5. An additional required field must be completed:
   *Number of Copies Needed: (over 1 creates multiple requests): Enter the number of copies needed.
   - Add additional information in the **Borrower's Notes** as needed.

6. Select the **Submit** button to process the request. The confirmation message will indicate the number of requests submitted. Click the **X** in the upper right to close the ILL Request form.

If you need 5 copies of an item, and 25 libraries own the title being requested, the system will perform the calculation to create 5 requests that each include a lending string of 5 libraries.

If the **Number of Copies Needed** specified is greater than the number of potential lenders, the message "The number of copies cannot exceed the number of lenders" will display when you submit the request. Click the OK button and decrease the number of copies needed or cancel the request.

Multi-copy requests for items owned by your library are *not* placed in the status of **Awaiting Approval** as it is assumed you need more copies than owned.

Note on ILL Lending Policies: The 2011 *PA Interlibrary Loan Procedures Manual* (p. 1) reads as follows: Items such as the following may be requested and lent if within the guidelines of individual library or consortium policy:
- Best sellers and popular items
- Bound volumes of periodicals
- Multiple copies
- Recently published titles
- Titles owned locally

ILL Admin Menu

The **ILL Admin** menu on the Staff Dashboard provides access to features and functions related to administration of interlibrary loan activities for your library.

➢ See *Access PA SHAREit: Navigation* for the procedure to create a **Quick Menu** for easy access to frequently used functions.

The **ILL Admin** menu provides access to the following functions:

Request Manager – lets you view active ILL requests submitted *as a borrower* or received *as a lender*, by status category; and provide responses, as appropriate, to your trading partners.

Borrower – a submenu of functions for managing requests submitted *as a borrower*:
- **Title Browse** – browse a list of *all* active and completed ILL requests submitted as a borrower, by the title of the item requested.
- **Request Number Search** – locate the Full Record Display for a specific request using the system-assigned Request Number.
- **Statistics** – generate reports that provide snapshots of ILL requests submitted as a borrower, under various fulfillment headings, by week or month.
- **Record Counts** – generates a report that shows the total number of requests submitted as a borrower, grouped according to status.
- **Days to Receive Report** – generates a report that summarizes the amount of time, including time in transit, it took to receive materials from lenders for a given time period.
- **Patron Browse** provides a list of requests submitted as a borrower, by the patron name entered on the ILL Request form.

Lender – a submenu of functions for managing requests received *as a lender*:
- **Title Browse** – lets you browse a list of requests received as a lender, by the title of the item requested.
- **Request Number Search** – lets you locate the Full Record Display for a specific request you have received using the system-assigned Request Number.
- **Statistics** – generates reports that provide snapshots of requests you have received as a lender, under various fulfillment headings, by week or month.
- **Record Counts** – generates a report that shows the total number of active requests you have received as a lender, grouped according to status.
- **Days to Supply Report** – generates a report that summarizes the amount of time it took to provide and ship requested materials to borrowers for a given time period.

Maintain Participant Record – see *Access PA SHAREit ILL Admin: Participant Record* for information on verifying and updating your library's contact information and lending policy to ensure your ILL transactions are processed correctly.

Maintain Shipping Labels – allows you to view and print shipping labels.

Search Library Information – to look up contact information and lending policies of other libraries.

Using the Request Manager

The **Request Manager** provides an overview of your library's ILL activity as both a borrower (on the left) and a lender (on the right) and allows you to manage and process requests.

ILL Admin > Request Manager

Manage Borrower Requests

Action items	
Status	**Count**
Awaiting Approval	0
Not Received	0
Not-Received/Overdue	0
Accepted Renewal	2
Recalled	0
Unfilled	0
Shipped	13
Complete	2
Conditional	0
Received	19
Rejected Renewal	0
Overdue	0
Expired	0
Retry	0
Cancelled	0
Cancel Shipped Request	0

Items awaiting trading partner response

Returned	10

Manage Lender Requests

Action items	
Status	**Count**
Pending	1
Will Supply/In Process	0
Renew/Overdue	0
Pending Cancel	0
Renew Pending	0
Returned	8
Lost	0

Items awaiting trading partner response

Shipped	1
Complete	1
Received	11
Overdue	1

Manage Borrower Requests shows the current status for all active requests submitted by your library *as a borrower*.

- The **Action items** section lists up to 19 status categories for requests submitted by your library *as a borrower*, and indicates the total number of active and completed requests in each category.
  - Status categories that require action by you are displayed as active links in the **Action items** section of the list. Click the link to open the Status Browse List.
  - Categories in which no ILL requests are pending are shown in "normal" type; these categories cannot be selected for viewing.
- The **Items awaiting trading partner response** section provides information related to requests that are awaiting response from the lender. It lists lender status categories and indicates the total number of active and completed requests in each category. Click the link to open the Status Browse list.

Manage Lender Requests shows the current status for all active requests received by your library *as a lender*.

- The **Action items** section lists seven status categories for the requests received by your library *as a lender*, and indicates the total number of active and completed requests in each category.
  - Status categories that require action by you are displayed as active links in the **Action items** section of the list. Click the link to open the Status Browse List.
  - Categories in which no ILL requests are pending are shown in "normal" type; these categories cannot be selected for viewing.
- The **Items awaiting trading partner response** section provides information related to requests that are awaiting response from the borrowers. It lists borrower status categories and indicates the total number of requests in each category. Click the link to open the Status Browse list.

Status Browse Lists

Borrower's status browse lists include the 5-character code and name of the lending library:

Title	Req. No.	Lender	Patron Name	Status
The brutal telling	1992	PCALO (TRAINING Carnegie Library of Pittsburgh)	Patron	Pending ▼

Lender's status browse lists include the 5-character code and name of the borrowing library:

Title	Pub Date	Req. No.	Borrower	Status
The curious incident of the dog in the night-time	2003.	551	PNRTL (TRAINING Northampton Area Public Library)	Returned ▼

The default sort order for all status browse lists is alphabetically by Title. The **Sort this Status by** menu lets you re-sort a status browse list with two or more requests according to a selected sort key.

To sort a status browse list, open the desired status browse list.

Select the desired sort order from the **Sort this Status by** menu.
- The table will automatically re-sort.
- The selected option becomes the *default* sort key for the associated status category until you select a new option.

Sort this Status by: ➡ | Title ▼
Author
Call Number
Current Lender Lib Code
Due Date
Format
Last Status Change Date
Material Type
Need-by date
Origination Date
Respond by Date
Patron Name
Request Number
Request Type
Title

Apply this status to **All Requests** on this page:

Title
The brutal telling
The brutal telling

The following tables define the default sort orders for the borrower and lender statuses.

Borrower's Sort Order Descriptions

Sort Order	Primary Sort Order	Secondary Sort Order
Author	Alphabetically by text in author field	Title, then request ID
Call Number	Requests with no call numbers, followed by requests with call numbers	Request ID
Current Lender Lib Code	Lender's library code	Title, then request ID
Due Date	Date in ascending date order	Title, then request ID
Format	Braille, Electronic, Large Print, Microform, None of the below	Within each, by title, then request ID
Last Status Change Date	Date in ascending date order	Title, then request ID
Material Type	Archival Mixed Material, Book, Computer File, Map, Music, Music Score, Non-Musical Sound Recording, Serial, Visual Material	Within each, by title, then request ID
Need-by Date	Date in ascending date order	Title, then request ID
Origination Date	Date in ascending date order	Title, then request ID
Respond by Date	Date in ascending date order	Title, then request ID
Patron Name	Text in the patron name field; normalized	Title, then request ID
Request Number	Lowest request number	Title, then request ID
Request Type	Returnable (BRW), non-returnable (CPY), reference request (REF)	Within each, by title, then request ID
Title	Title, excluding initial articles	Request ID

Lender's Sort Order Descriptions

| Sort Order	Primary Sort Order	Secondary Sort Order
Author	Alphabetically by text in author field	Title, then request ID
Borrower Lib Code	Borrower's Library Code	Title, then request ID
Call Number	Requests with no call numbers, followed by requests with call numbers	Request ID
Due Date	Date in ascending date order	Title, then request ID
Format	Braille, Electronic, Large Print, Microform, None of the below	Within each, by title, then request ID
Last Status Change Date	Date in ascending date order	Title, then request ID
Material Type Material Type (Cont.)	Archival Mixed Material, Book, Computer File, Map, Music, Music Score, Non-Musical Sound Recording, Serial, Visual Material	Within each, by title, then request ID
Need-by Date	Date in ascending date order	Title, then request ID
Origination Date	Date in ascending date order	Title, then request ID
Respond by Date	Date in ascending date order	Title, then request ID
Patron Name	Text in the patron name field; normalized	Title, then request ID
Request Number	Lowest request number	Title, then request ID
Request Type	Returnable (BRW), non-returnable (CPY), reference request (REF)	Within each, by title, then request ID
Title	Title, excluding initial articles	Request ID

Updating ILL Requests

To change the status of an ILL request in your Action items list:

1. Open the Status Browse list.
2. Determine the appropriate status option based on the status of the request. The specific options available in the Status menus depend upon the status of the request (see *Access PA SHAREit ILL Admin: Borrower's ILL Status Definitions* and *Lender's ILL Status Definitions*).
3. Select the desired option from the Status menu for each title in the list or apply the same status change to all titles in the list using the **Apply this status to All Requests on this page** menu (available when two or more requests are in the Status Browse List).
   - Optionally, you may open the Full Record Display by clicking on a title in order make specific changes to a request, such as changing the due date.
4. Select the **Submit** button after making desired status changes.

Borrower's Tips for Updating ILL Requests

1. Requests for items owned by your library are automatically placed in the status of **Awaiting Approval** (except for multi-copy requests). The status must be changed to **Approved - Send** before the request is sent to the first potential lender.
   - Select **Awaiting Approval** from the **Request Manager** screen to view the list of requests in this status. The "house" icon indicates the item is owned by your library.
   - Change the status to **Approved – Send** then click the **Submit** button located above the list.
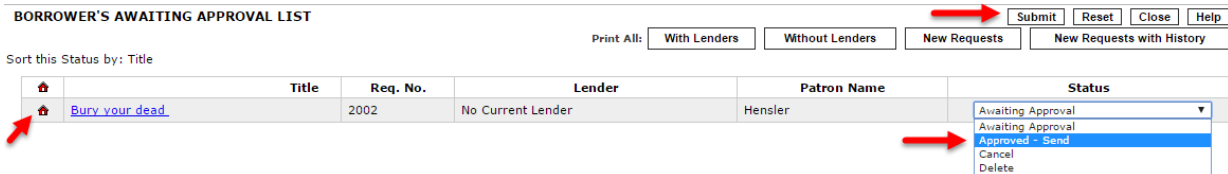
   You may create an email alert for requests in Awaiting Approval status. See the **URL Information** section in *Access PA SHAREit ILL Admin: Participant Record* for the procedure.

2. Lenders may action a request as **Conditional**. You may accept or reject the condition. If you accept it, the request will go back to that lender. If you reject the condition, the request will move to the next potential lender. Conditions specified by the lender appear in the **Lending Restrictions**, **Lenders' Notes** (if the lender added a note) and in the **History Information** fields on the **Full Record Display** for the request. Be sure you understand the condition before updating the status of the request.
   - In the Request Manager, select **Conditional** to view the list of requests in this status.
   - Click on the title, and then scroll down the Full Record Display to view the **Lending Restrictions**.
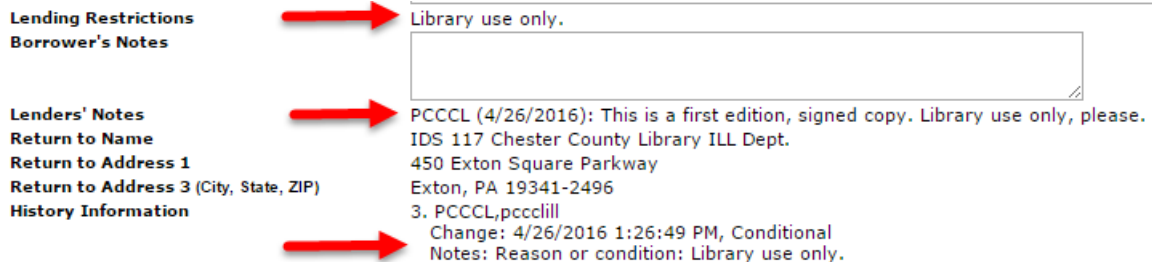
   - Scroll back up to the Status Options and change the status to **Accept Condition**, **Reject Condition**, or **Request Cancel** if the item is no longer needed and click the **Submit** button.
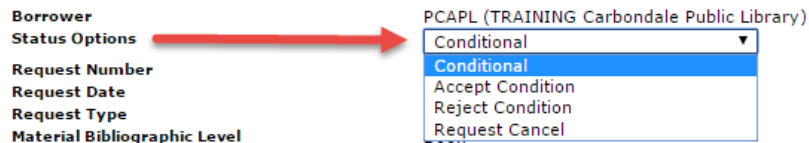
3. Always action received items as **Received** and then **Returned** when sent back to the lending library. This allows the lender to track the status of the items. When the item is checked in by the lender, the request will be **Complete** and will be deleted in five days.

4. Shipping labels are generated only after the status of a request is changed to **Returned**.

Lender's Tips for Updating ILL Requests

1. See the **URL Information** section in *Access PA SHAREit ILL Admin: Participant Record* for the procedure to create an email alert for new **Pending** requests.

2. The **Note icon (push pin)** in the **Pending** Status Browse List indicates the borrower included a note when initiating the request.

   To view the note, click the title to open the **Full Record Display**. The **Borrower's Notes** field is just below the two blue arrow icons in the middle of the display.

3. Select **Pick List** to print a list of **Pending** requests:
   - Sort by **Call Number** first so titles will print in a sequential order for your library

4. When updating certain statuses in the **Pending list**, also include a reason or condition along with the status change. Select the appropriate reason or condition from the Reason/Condition menu. Examples where a reason or condition must be provided are:
   - **Conditional**: Select the condition, such a "Library Use Only."
   - **Will not Supply**: Select a reason you cannot supply the item so, if the request is not filled, the system correctly returns the request to the borrower in either the Unfilled or Retry status.

5. Selecting **Will Supply/In Process** will change the deadline date (typically 3-5 days) to the current date plus 730 days (i.e., two years).
   - **Will Supply/ In Process** should only be used by libraries for which it may take at least one day or more to determine if you are able to ship a requested item. Once the determination is made, Staff **MUST** remember to action the request accordingly, i.e., **Shipped** or **Will Not Supply**.

6. When items are returned to your library, always action them **Check In** to complete the request. Complete requests are deleted in five days.

7. Shipping labels are generated only after the status of a request is changed to **Shipped**.
   - If an item is accidentally actioned shipped, staff may bring up the item and select **Undo Shipped**. The status will change back to Pending, from which you can correct the status accordingly.

Maintain Shipping Labels

The **Maintain Shipping Labels** function in the **ILL Admin menu** lets you generate shipping labels for use in shipping items to borrowing libraries, or in returning items to lending libraries.

By default, the **Shipping Labels** screen lists all active requests with statuses of **Both Shipped and Returned** for which shipping labels may be printed. Each line provides the following information:
- **B or L** – Indicates the "role" of your library for the associated request; either **B**orrower or **L**ender.
- **To** – the name of the library to which the shipping label will be addressed.
- **Title** – the title of the requested item.
- **Print Status** – the print status for the shipping label; either Printed or Unprinted.

The **Include** menu allows you to limit the list by status:
- **Shipped Status Only** – Items for which you are the Lender
- **Returned Status Only** – Items for which you are the Borrower
- **Both Shipped and Returned** – default view

The **Print** menu allows you to select the type of label to print.
- **Consortium Labels** are the default and are the recommended label; they include all **Ship to** address information for both the borrowing and lending libraries and request information
- Avery 5160 labels: not recommended as they do not include all information for both libraries

The **View** menu default is **Unprinted Labels Only**
- **Printed Labels Only** allows you to reprint labels if necessary due to a paper jam or other reason.

To Print Shipping Labels:

1. Verify the **Include**, **Print** and **View** settings are correct.
2. Use the **Selected** check boxes for individual lines or the **SELECT ALL** box to select the ILL requests for which you wish to print shipping labels.
3. Click the **Format to Print** button.
   - An additional browser window opens displaying the formatted shipping labels.
4. Use the standard procedures for your web browser to print the "contents" of the labels window.
5. Close the formatted shipping labels.

Note: Once the **Format to Print** button has been clicked, the selected ILL requests are marked as Printed, regardless of whether or not you physically print the shipping labels. If you do not physically print the shipping labels at this time, it is not possible to return the ILL requests to Unprinted status. If you need to print them again, select **Printed Labels Only** from the **View** menu.

Deleting ILL Requests from the Shipping Labels List

You can delete selected requests from the shipping labels list. The system automatically removes shipping labels from the Maintain Shipping Labels list under the following conditions:
- Borrower requests are removed from the **Maintain Shipping Labels** list when the lender updates the status of the request to either Check In or Lost, or when the borrower updates the status of the request to Lost.
- Copy requests are removed from the Maintain Shipping Labels list during midnight processing on the day the borrower updates the status of the request to Received.
- **Note:** Once an ILL request has been deleted from the list, it cannot be recovered. If you choose to delete an Unprinted request, you should confirm that a shipping label for the request will not be needed prior to deleting the request.

To delete ILL requests from the shipping labels list:
1. If desired, use the **Include** and **View** menus to limit the list by request and/or print status.
2. Use the **Selected** check boxes to select the ILL requests you wish to delete.
3. When all desired ILL requests have been selected, click the **Delete** button.
   - The screen refreshes displaying any remaining/unselected requests.

ILL Request History

The **History Information** section of the **Full Record Display** has the history of each request from the time they were created until the materials have been returned to the lender. To open the Full Record Displays:
- In the **Request Manager**, select an active status and select a title in the list
- Use the Borrower's or Lender's **Request Number Search** to open a specific record
- Use the **Title Browse** to search for then open a specific record

Note: You may modify or update information contained in a text box on the **Full Record Display** by selecting and entering the desired information. Depending on the type and status of a request, some fields may not be displayed or editable.

Navigation

Four navigation icons are available in the upper right of the Request Manager and other staff modal, or pop-up, screens:
- **Home**: allows you to go back to the top level staff screen. For instance, if you start at Request Manager and click down through some specific request screens, this click will take you directly back to Request Manager, without having to go back out to the Dashboard first.
- **Refresh**: allows you to refresh the screen you are currently viewing.
- **Print**: This is a "print screen" button that can be used as a quick print for some of the shorter screens that don't already have their own *Format to Print* button. Note that this only prints what is on the screen (similar to a CTRL-P command); it will not print an entire page, if there is scrolling involved.
- **Close**: returns to the Staff Dashboard.