V. SETTING UP INTERLIBRARY LOAN TRANSACTIONS

Some settings for Loan SHARK can be set at the local library level. These include overriding some system-wide default settings, adding closed days to the Calendar, changing the local library’s email address on Subject Requests, configuring pull slips, and adding, updating and deleting users.

Logging in to Settings

1. Log in as ILL Librarian.  
   Result: You will see the Home screen.

2. Click the blue Settings button on the Home toolbar on the left.  
   Result: You will see the Settings screen. Blue buttons on the left toolbar include Configuration, Lenders, Calendar, Email Setup, Subject Request, Pull Slips, and Add, Update and Delete Users.  
   Note: The list of Lenders and the Lender String have been set by the system. The State Library asks that local libraries not change the default settings. Loan SHARK does not use patron email notification, so the Email Setup does not apply to our system.

Configuration

1. Click on the blue Configuration button on the Settings toolbar on the left.  
   Result: You will see the Edit Library Configuration form.

2. The State Library recommends that only the following configuration details be considered for modification by local libraries:
   - **Skip Details Form in Scan Mode?**: Answering No displays a detailed page about the transaction whenever a barcode is scanned. It helps prevent answering errors. Answering Yes skips the detail page.
   - **Warn before placing a Lost**: Answering Yes provides a warning that a lost message terminates the ILL transaction and the lost status cannot be changed. Answering No skips the warning.
   - **Default Transactions Per Page**: Sets the number of transactions that will show in a transaction list: 10 to 100 may be selected; 50 is the optimum number for speed and system performance.
   - The other items in the form should be left as they have been set by the System Administrator.

3. To save the settings, click the Update button at the bottom of the form.  
   Result: You will see a confirmation message.

Calendar

1. Click on the blue Calendar button on the Settings toolbar on the left.  
   Result: You will see the Library Calendar screen. Days that are considered “non-business” days by the system are indicated in red. The days marked in red cannot be overridden by a local library.
2. In the Weekday Calendar, set Open or Closed for each weekday that is always open or closed at your library. To change a setting, click the down arrow and select the needed option. Saturday and Sunday are not shown on the Weekday Calendar because they are considered “non-business” days.

3. If there are other days (such as special holidays) when your library is closed, move down the page to find the month and day and click the check box under that day. (The check mark means "closed.") To remove a check mark, click the box.

*Hint:* If you are the only person at your library who does interlibrary loan, and you are going on vacation, you might want to “close” your library during the period that you are gone so that all interlibrary loan transactions will bypass your library.

*Note:* If a request arrives at the library on a closed day, and the request is set to Expire before the library reopens, an automatic response of Unfilled will immediately be sent to the borrowing library. Otherwise, the request remains at a potential lending library for 2 days waiting to be answered before moving on to the next library in the lender string. Changing the calendar settings for the days your library will not be providing interlibrary loan service helps the borrowing patron get the item faster.

4. To save the settings, click the **Update** button on the lower part of the Library Calendar page.

*Result:* You will see a confirmation screen.

### Subject Requests

The defaults for Subject Request email messages to the State Library have been set by the system. The default should be edited only if the local library’s email address changes.

1. Click on the blue **Subject Request** button on the Settings toolbar on the left.

*Result:* You will see the Subject Request Setup form with the template already filled in.

2. Change the **From** field to show the new email address for interlibrary loan for your local library.

3. Click the **Set Defaults** button.

*Result:* You will see a confirmation message.

### Pull Slips

1. Select the blue **Pull Slips** button on the Settings toolbar on the left.

*Result:* You will see the Local Pull Slip Settings form.

2. Click in each check box as needed to turn on (or off) the printing of each type of information. You can also change the number of pull slips to be printed per page.

*Note:* The State Library recommends that the Local Pull Slip Setting look like the figure that follows. However, you should determine whether you want 1 or 2 pull slips printed per page.

3. After making changes, click the **Save** button on the lower part of the form.
Local Pull Slip Settings

| Item Type: ✔ | Request Date: ✔ |
| Publisher: ✔ | Place On Hold: ✔ |
| Place Of Publication: ✔ | Maximum Lending Fee: ✔ |
| Publication Date: ✔ | Reciprocal Agreement: ☐ |
| Pagination: ✔ | Will Pay Fee: ✔ |
| Sponsoring Body: ✔ | Payment Provided: ✔ |
| Verification Reference Source: ✔ | Delivery Method: ☐ |
| Copyright Compliance: ☐ | Bar Codes: ✔ |
| Note: ✔ | Send-To Address: ✔ |
| Level Of Service: ✔ | Billing Address: ☐ |
| Return-To Address: ✔ |

How many pull slips would you like to print per page?: ☐ 1 ☐ 2

Add User

1. Click on the blue **Add User** button on the Settings toolbar on the left.  
   *Result:* You will see the Add User form.

2. Fill in the required fields listed below for adding users. The others are optional.
   - **First name:** Capitalize first letter only.
   - **Last name:** Capitalize first letter only
   - **Phone:** Type 10 digits; use all zeros if there is no phone
   - **Login Name:** If the new user is a staff member who will be doing interlibrary loan activities in Loan SHARK, select a name that will be easy to remember. *Suggestion for new patron:* Use the patron’s barcode number; or use the patron’s first name and last name as one word, all in lower case.
   - **Password:** If the new user is a staff member who will be doing interlibrary loan activities in Loan SHARK, select a name that will be easy to remember. *Suggestion for new patron:* Use the patron’s first name and last name as one word, all in lower case.
   - **Security Level:** Select ILL Librarian when adding a library staff member who will be using Loan SHARK for interlibrary loan; select patron for all others.
• User Type. There are three user types in the drop down box:
  o LIMITED (25) 25 active requests. Patrons in this user type are allowed only 25 active requests in the system. Loan SHARK will automatically block the 26th request from being placed.
  o NONE (-1): This is an administrator. Users with ILL Librarian security level should be assigned this user type.
  o PATRON (-1) Unlimited. Patrons in this user type are allowed unlimited active requests in the system.

3. After entering data in the form, save by clicking the Go! button.
   Result: You will receive a confirmation (or error) message.

Update User

1. Click on the blue Update User button on the Settings toolbar on the left.
   Result: You will see the Find User to Update form.

2. Click the down arrow beside the Search By field to select the method for searching: Name, Name and Phone Number, Phone Number, User Name, or ILL Librarians.
   Note: Loan SHARK does not use the Unverified Patrons or the System Administrator fields.
   The entry fields will change, depending on the Search By selection. Enter data and click the Search button.
   Hint: Searching by the first letter of the last name brings up the whole list of Users with that initial letter. Sometimes it is easier to find your patron that way than searching by the full name.
   Result: You will see a list of Users.

3. Select the User you want from the list of records displayed.
   Result: You will see the Edit User form.

4. Edit data as needed in the Edit User form. Click on the Go! button to save changes.
   Result: You will receive a confirmation (or error) message.

Delete User

1. Click on the blue Delete User button on the Settings toolbar on the left.
   Result: You will see the Find User to Delete form.

2. Click the down arrow beside the Search By field to select the method for searching: Name, Name and Phone Number, Phone Number, User Name, or ILL Librarians.
   Note: Loan SHARK does not use the Unverified Patrons or the System Administrator fields.
   The entry fields will change, depending on the Search By selection. Enter data, and click the Search button.
   Hint: Searching by the first letter of the last name brings up the whole list of Users with that initial letter. Sometimes it is easier to find your patron that way than searching by the full name.
   Result: You will see a list of Users.

3. Select the record you want to delete and click on the name. A message asks, “Are
you sure you want to delete this user?” Click OK to delete.

Result: You will see a confirmation (or error) Message. If the user has an interlibrary loan transaction in the system, the User record cannot be deleted, and an error Message will appear.