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# **III training Documentation**

***Release 2018.08.27***

**NEKLS staff**

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# CHAPTER

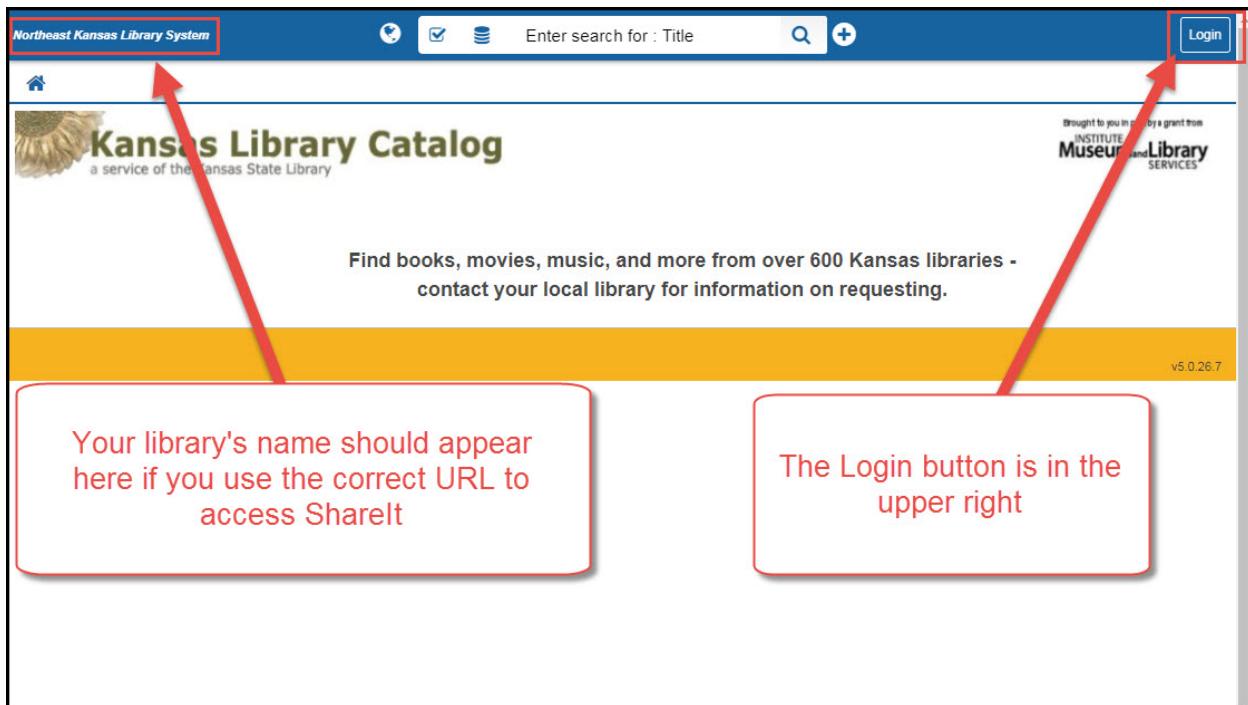
# ONE

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## LOGGING IN TO SHAREIT

### 1.1 Example logon

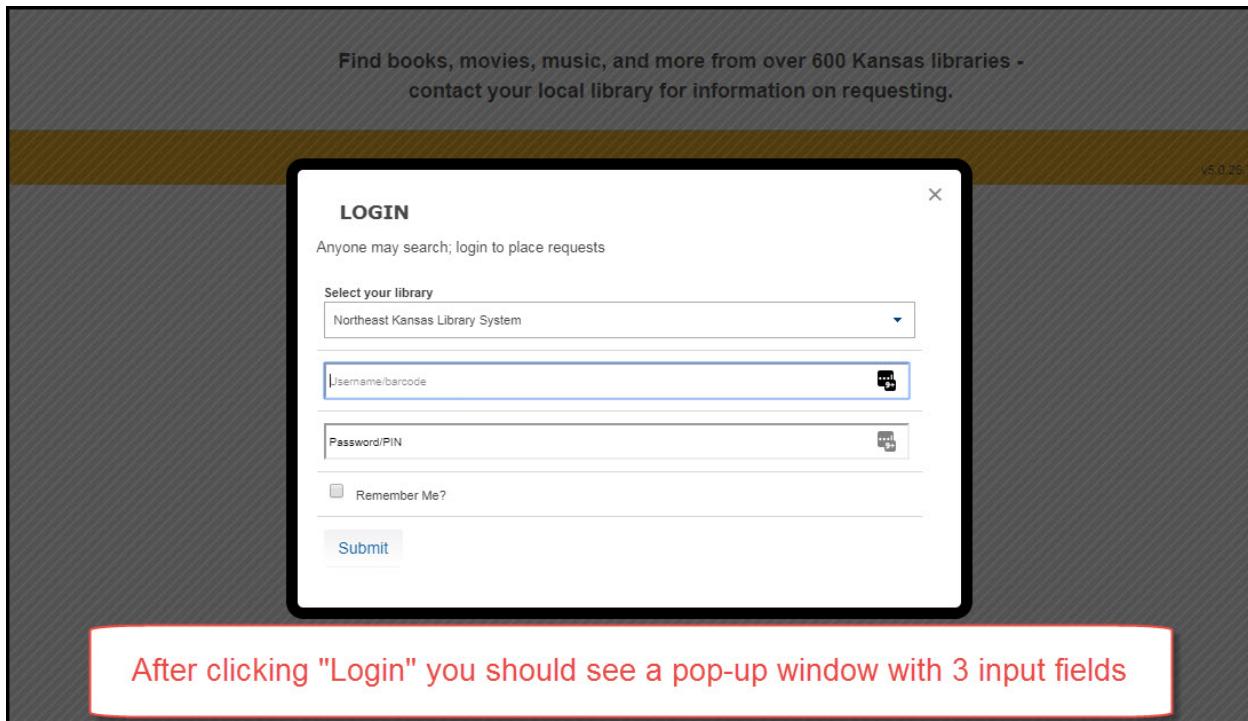
Go to your *ShareIt URL*



Logon screen

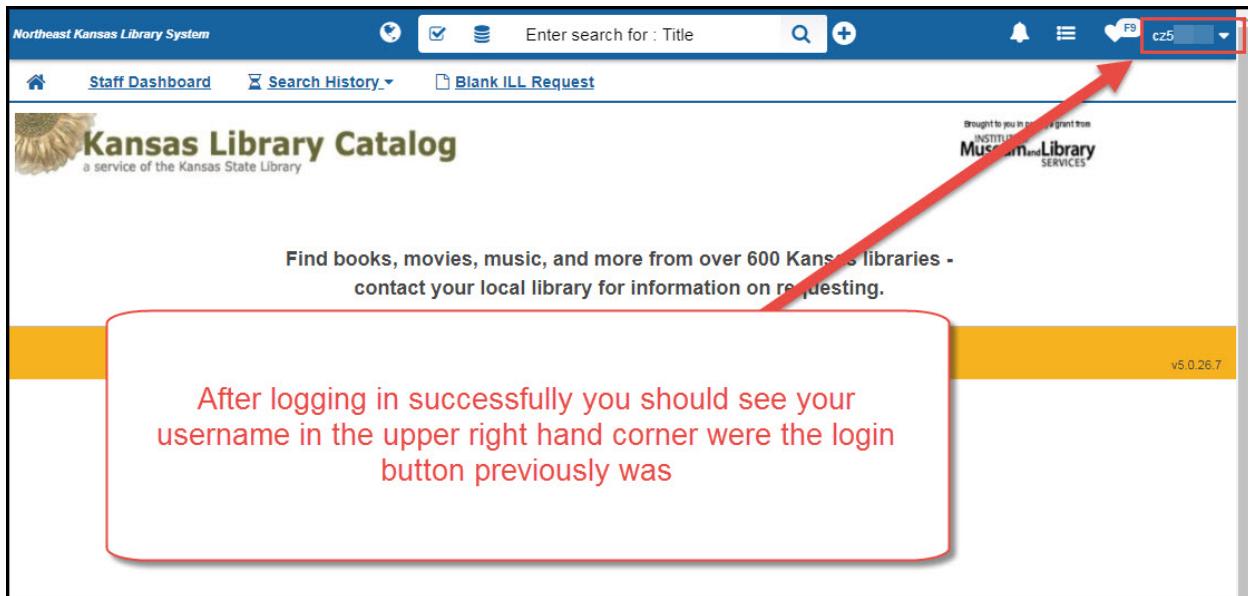
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Login with your *ShareIt Usernames and Password*



### Username and password screen

A successfull login should look like this:



### Success screen

If you have trouble logging in, keep reading.

### 1.1.1 ShareIt URL

ShareIt requires that each library logs in from a specific URL.

The format for a ShareIt login URL is

`http://ksuc-agent.auto-graphics.com/mvc?cid=ksuc&lid=XXX&reset=over`

The difference between one library's login and another's is that you have to substitute the XXX in the middle of the above URL with your library's OCLC organization symbol. If you do not know your library's OCLC organization symbol, it can be found at

### 1.2 Next Search Catalog URL location

If you are a member of the Next consortium, you can find the ShareIt URL for your library on the left side of the home page in the staff client.

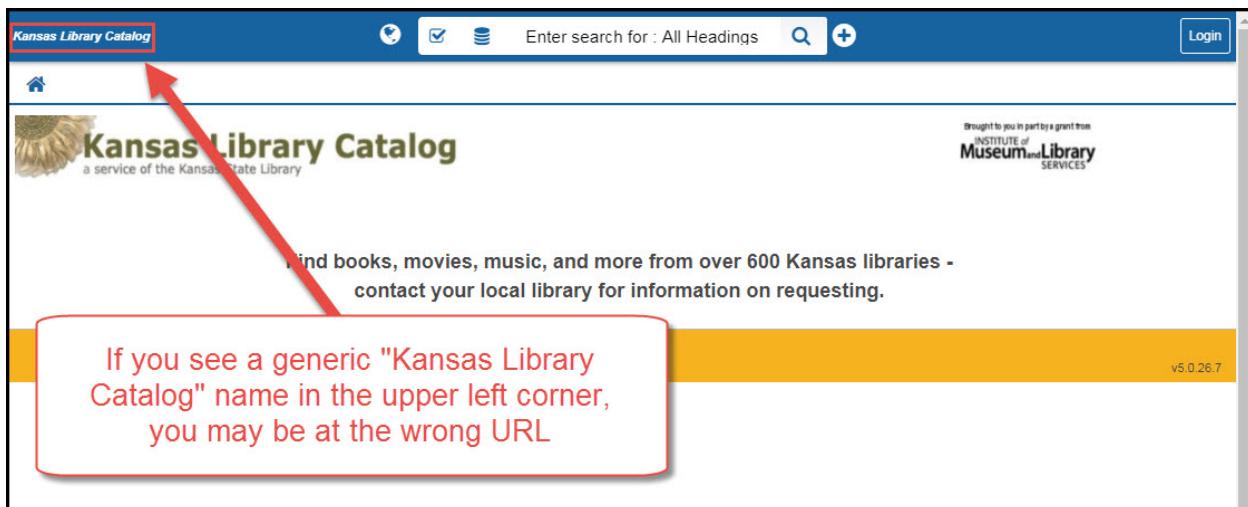
The screenshot shows the Next Search Catalog homepage. At the top right, there is a dropdown menu labeled "Northeast Kansas Library System". A red arrow points from this menu down to a callout box containing the text "Logged in at NEKLS (upper right hand corner) = ShareIt link is for NEKLS ShareIt URL". Another red arrow points from the bottom left of the same callout box up to the "ShareIt statewide ILL" link in the sidebar. The sidebar also contains links for "Holds report", "Professional Development Additions", and "ShareIt statewide ILL". The main content area includes sections for "Important links for Northeast Kansas Library System", "Suggestions pending approval: 388", "Patrons requesting modifications: 4", and "NExpress".

Next Share Catalog link screen

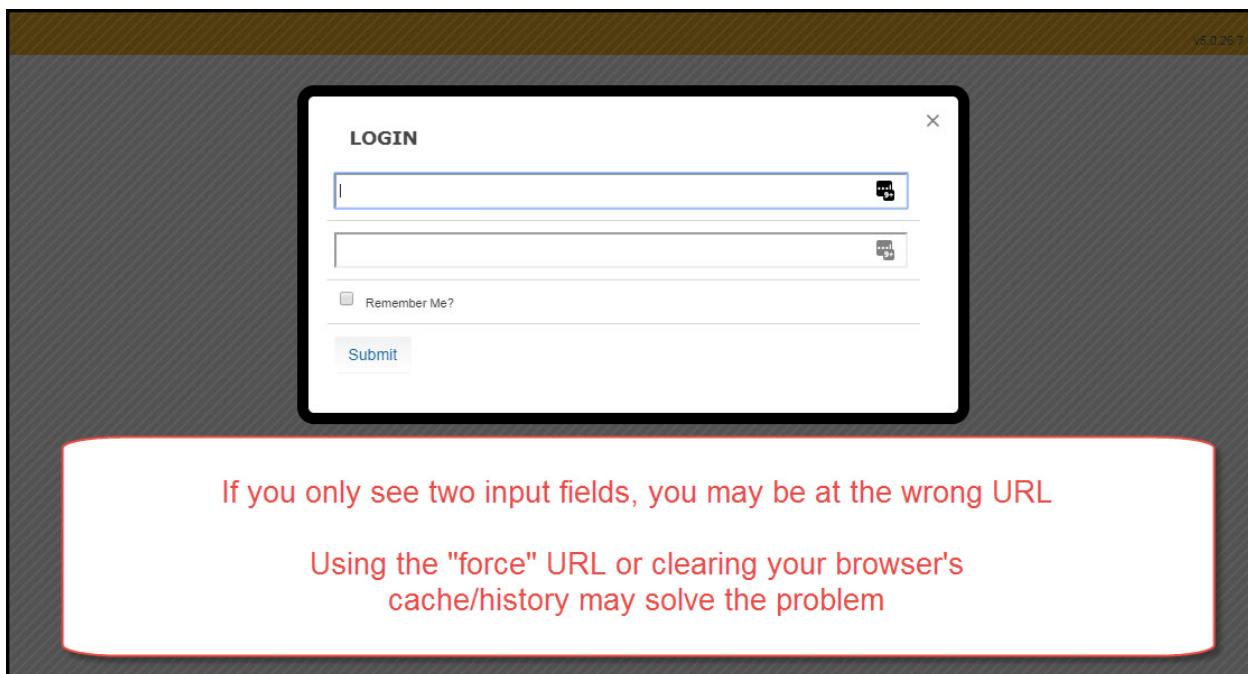
### 1.3 URL Troubleshooting

If you attempt to log into ShareIt and you do not get the normal login window, you can usually overcome the problem by logging into an alternate URL shown below.

The most common URL problem looks like this:



Kansas Library Catalog screen



Two input boxes screen

If you see either of these scenarios, you can try an alternative URL

```
http://ksuc-agent.auto-graphics.com/mvc?cid=ksuc&lid=XXX&reset=force
```

The difference between this URL and the previous one is that the last part of the URL is changed from "over" to "force" (you will need to put your OCLC symbol where the XXX is in this URL too).

You can also try clearing the history/cache on your web browser. In Firefox and Chrome you can accomplish this by typing CTRL-SHIFT-DELETE and following the on-screen instructions to delete all of your saved Cookies, Cache, and Content.

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As always, if you have any problems you can contact NEKLS or the State Library of Kansas for assistance. Next Search Catalog members can contact us at nexthelp \_at\_ nekls.org.

## **1.4 ShareIt Usernames and Password**

If you do not know your library's username and password for ShareIt, contact the NEKLS office or the State Library of Kansas. Next Search Catalog members can contact us at nexthelp \_at\_ nekls.org. We cannot recover any lost passwords, but we can easily create a new password for you.



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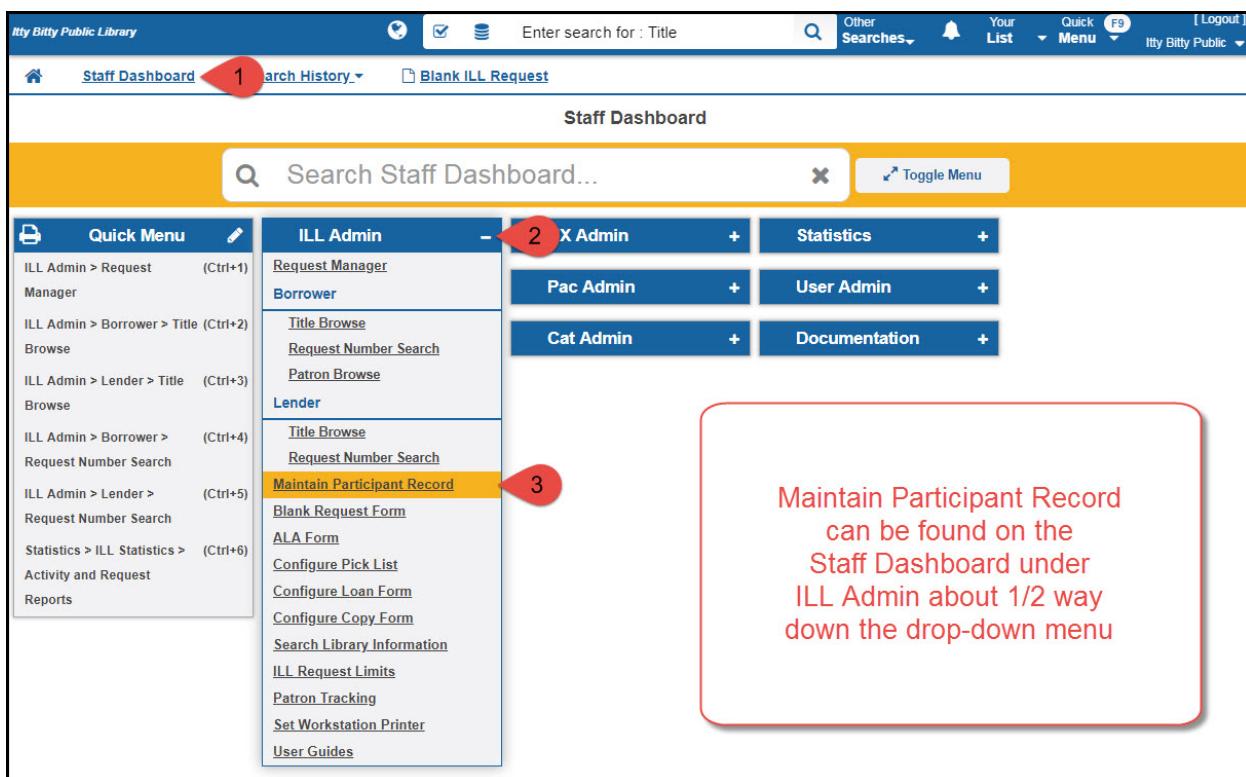
## CHAPTER TWO

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# PARTICIPANT RECORD

## 2.1 Setting up your ShareIt participant record - Basic

Log into ShareIt as normal, then click on the link that says “Staff dashboard,” then click on “ILL Admin,” and, finally, choose “Maintain Participant Record” from the drop-down menu.



### Locating participant record

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Once you’re logged in, the basic setup for public libraries requires that you fill in the fields highlighted in green in this screenshot:

#### Basic participant record setup

#### Basic participant record setup

**Lender Information** 

Select to display to patrons

Library Code:	KNL
Library Name:	Itty Bitty Public Library
Library Type:	Public
Agency Code:	
Broker Code:	
Days to Respond:	3
Ref Request Default:	
Days to Supply:	10
Days to Return:	35

Days Requests are Processed:

Preferred Lender List:

KKW
FG3
FH7
CY3
LY2
LQ5
FI9

**Add Lender**

System Wide:

CK5
DQ2
BO6
DQ8
SG5
XR0
OR5

ISSI Participant?  Yes  No

Blocked Lenders:

Primary Default Lender:

Secondary Default Lender:

Notes  
(700 characters max):

Move Request with Patron Note to Awaiting Approval?  Yes  No

Move Request with Vols Needed Note to Awaiting Approval?  Yes  No

Show Blank ILL Form  Staff  Patrons  Institutional  Guests  Guests - Require Login

Show Request This Button  Staff  Patrons  Institutional  Guests  Guests - Require Login

Uses Mediated Patron Renewal:  Yes  No

Show Patron Willingness  Yes  No

Show Pay Message:  Yes  No

Blank Request - Disable NCIP Function:  Yes  No

Blank Request - Disable Availability:  Yes  No

Display History Information:  Oldest First  Newest First

Calculate Renewed To Date:  Add to original due date  Add to Accept Renewal date

"Any Edition is Acceptable"  Yes  No

Checked as default: Customer Field 6 on Request Form  Yes  No

Shipping Label Default:  Shipped Status Only  Both Shipped and Returned

Hide patron data on shipping labels:  Yes  No

Show Patron Note to Lenders:  Yes  No

Display [ILL Lender] to Patrons/Guests:  Yes  No

Allow patrons to change need-by date:  Yes  No

Allow patrons to change pickup location:  Yes  No

Allow batch request from list:  Yes  No

Set Default Need-by Date: 90 Days from Date of Request.

Set Minimum Need-by Date: 10 Days from Date of Request.

Enable checking for duplicate requests:  Yes  No

Time Zone Adjustment (in hours): 0

**Owned by My Library**

Show Owned By This Library  Yes  No

**ILL Request Form Patron Notices**

Display Disclaimer Notice to Patrons:  Yes  No

Text of the Notice (Limit of 300 Characters): We will do our best to fill your request(s). Some items, such as DVDs and audio-books, are

Display ILL Status Notice:  Yes  No

Text of the Notice (Limit of 300 Characters): The system will check for lenders;

Required basic information

Days to respond = days to answer requests

Days to supply = days between 'shipped' and 'received'

Days to receive = days between 'received' and 'overdue'

Preferred Lenders List can be obtained from KLE

System Wide is automatically

These are the defaults recommended for a public library that does not allow patrons to place their own ILL requests

## SEARCHING AND REQUEST

### 3.1 Searching

#### 3.1.1 Search box

The search box appears at the top of every screen in ShareIt.

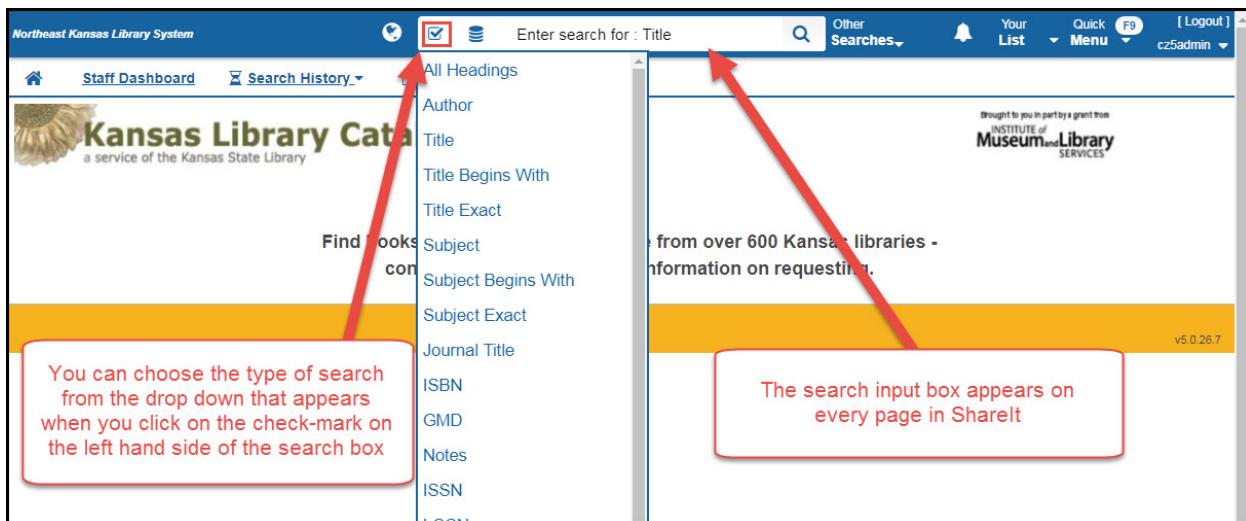


Fig. 1: Search box

#### 3.1.2 Catalog selection

The search will automatically search the catalogs selected by default for your library. The defaults can be changed from the “Search resources” menu on the staff dashboard.

#### 3.1.3 Search results

#### 3.1.4 Detailed results 1

Clicking on “View details” will give you more detailed results.

#### 3.1.5 Detailed results 2

Clicking on the cover of an item will give you even more details.

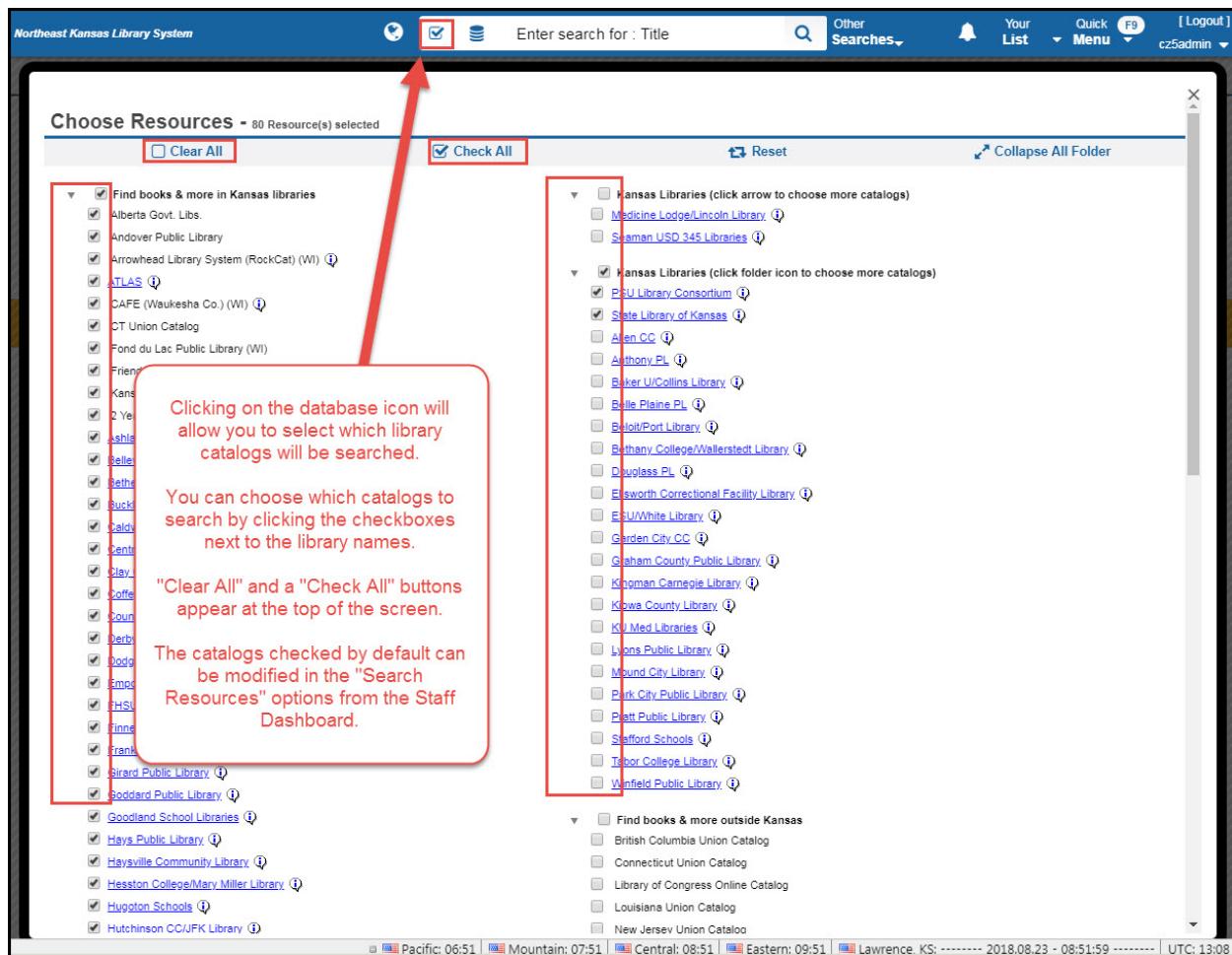


Fig. 2: Catalog search defaults

The search facets allow you to limit a search by format, author, subject, etc.

"View Details" shows you any separate bibliographic records associated with the ISBN that goes with this title

Clicking on a cover image (or a cover image placeholder) and clicking on the "View Details" button from the results list will take you to the same details page.

Click on a catalog name to see more details about a specific bibliographic record

"Request This Item" takes you straight to a request form from this results page

**3.1. Search**

Day of the Jackal

Clicking on "View Details" from the results list will show you all of the different bibliographic records associated with the title you've selected.

You can request the item from here

**Location Information - BOOK**

Caldwell Public Library 1 copy currently available.  
Manhattan Public Library 1 copy currently available.  
KCKPL 1 copy currently available.  
CAFE (Waukesha Co.), (WI) 1 copy currently available.

**Owning Libraries: 5**

Forsyth, Frederick, 1938- 0553266306 (pbk.)

**Location Information - BOOK**

Kansas Main Catalog 5 owning libraries.

Request This Item

Request This Item

Fig. 4: Details 1

The day of the Jackal / Frederick Forsyth

"Requests This Item" opens a request form

Details

"Multi-Copy" allows you request more than 1 copy of a title at once (say, for a book-club or classroom use)

ISBN : 0808514091 :  
ISBN : 9780808514091 :  
ISBN Price : \$18.40  
ISBN Price : \$18.40  
OCLC Number : (AU)9 99787444  
Orig Cataloging Src : Baker & Taylor Baker & Taylor  
LC Call Number : PR6006.069.D38 1995  
LC :

Request This Item

Add to Your List

Staff Functions

Multi-Copy

Print This Item

Download Record

Add to Download Cart

Edit Bib Record

Copy Cataloging

"Download Record" allows you to download a copy of the Marc record for this title

Where To Find It

Fig. 5: Details 2

## 3.2 Requests

### 3.2.1 Basic request

Once you find a title you want to borrow, click on the “Request this item” button to initiate a request. This will bring up a request form:

Once a request has been submitted, [it must be approved](#approve-requests-after-they-are-made) in the “Request manager” module.

### 3.2.2 Requesting multi-copies

If you need to borrow multiple copies of a title (maybe for a book-club or classroom use) you can request multiple copies of a title.

Once a request has been submitted, [it must be approved](#approve-requests-after-they-are-made) in the “Request manager” module.

### Approve requests after they are made

After requests have been made, staff need to approve the requests. The approval process is built into the system because some libraries allow patron initiated ILL requests through ShareIt. The approval process allows staff to review any requests before they are sent to other libraries to make sure the ILL request are in line with the borrowing library’s ILL policies.

**ILL Request - record (Loan)**

Borrower:	CZ5 Northeast Kansas Library System	
Title/Journal Title:	Test record	
Borrower's Notes:	Any notes you like can go here	
		Not required but often helpful
*Patron's Last Name:	Frosty	
	<input type="button" value="Patron Lookup"/>	
*Patron's First Name:	Barbara	
*Patron's Contact 1:	george+frosty@nekls.org	
Patron's Contact 2:		
Patron's Address 1:		
Patron's Address 2:		
Patron's Address 3 (City, State, ZIP):		
Patron's Library Card Number:	FROSTY12345602	
Request Type Options:	Returnable (loan)	
Material Bibliographic Level Options:	Book	
Material Format Options:	None of the below	
Verification:	Created from Z39.50 record :NEXT Search Catalog	
Any Edition is Acceptable:	<input checked="" type="checkbox"/>	
*Need by:	11/21/2018 <input type="button" value="Calendar"/>	
*Ship to Name:	Northeast Kansas Library System KS131	
*Ship to Address 1:	4317 W 6th St	
Ship to Address 2:		
*Ship to Address 3 (City, State, ZIP):	Lawrence KS 66049	
Pickup Location Options:		
		Required
Customer Field 1:		
Ship to Country:	USA	

**ILL Request - record (Loan)**

Multi-Copy lender list build is complete. 97 out of 97 targets have responded to this request. You have 60 potential lenders for this title.

Borrower: CZ5 Northeast Kansas Library System

Title/Journal Title: The day of the jackal.

All

The biggest differences between the single copy request form and the multi-copy request form is at the top, the lender's list, and the input box for the number of copies needed.

Material Format Options:

None of the below

Publisher (Place, Name, Date): New York Viking Press [1971]

Physical Description: 380 p. 23 cm.

ISBN: 0670259365 978067

OCLC Number: 00156908

Verification: KSUC\_UDB:47951

Any Edition is Acceptable:

\*Need by:

11/21/2013 

Fills in automatically - no need to edit

\*Lender List:

KKW,4,PR6056.0699 D3,ocm00156908  
CY8,2,F For,16635  
KKA,4,PZ4 .F7349 DAY,ocm00156908  
CX8,2,F FOR,  
LQ5,2,F FORSYTH FREDERICK,  
CU8,4,F Forsyth,ocm00156908  
CICI,2,FIC FOR,agcn13882  
PRTW,4,F For,agcn13882  
CU9,3,F Forsyth,ocm00156908  
BY8,4,Fiction FORSYTH Frederick,ocm00156908  
CR9,4,F F735d,12844

\*Number of Copies Needed: (over 1 creates multiple requests):

1

\*Ship to Name:

Northeast Kansas Library System KS131

\*Ship to Address 1:

4017 W 6th St

Ship to Ad

Change this to indicate the number of copies you desire

\*Ship to Ad

ZIP:

Pickup Location Options:



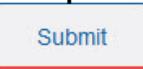
Customer Field 1:



Ship to Country: USA

Library of Congress Control Number: 74158414

### 3.2. Requests

 Submit

When done click "Submit"

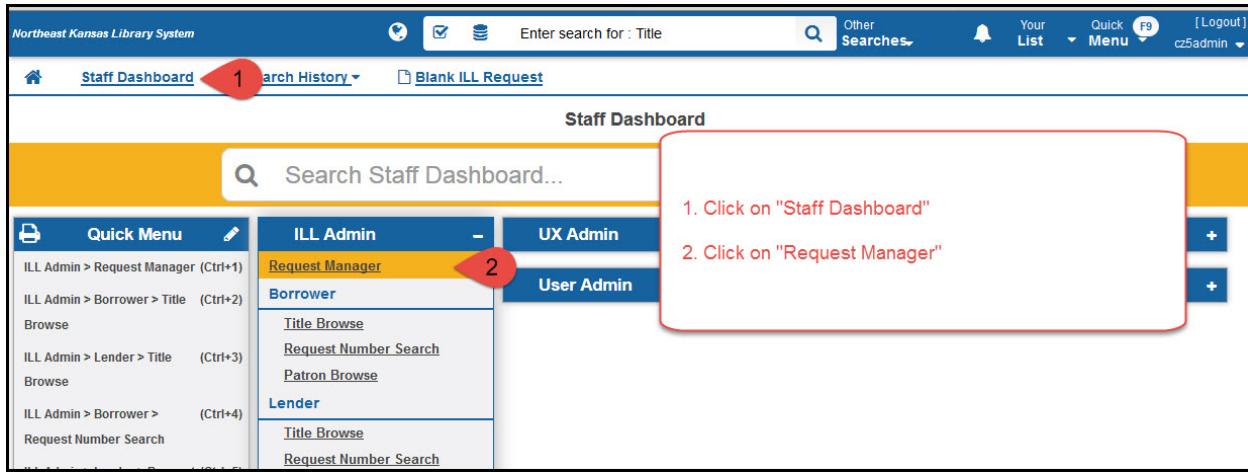


Fig. 8: Approval 1-2

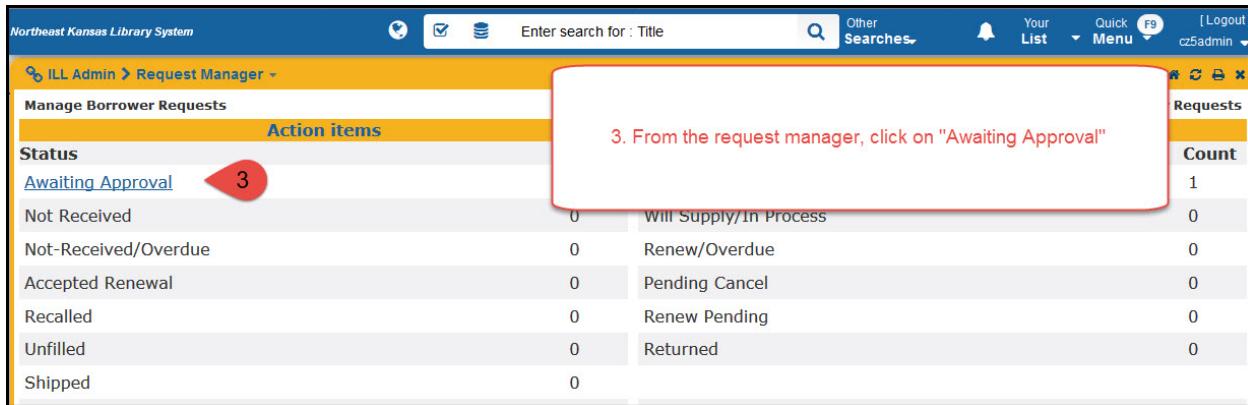


Fig. 9: Approval 3

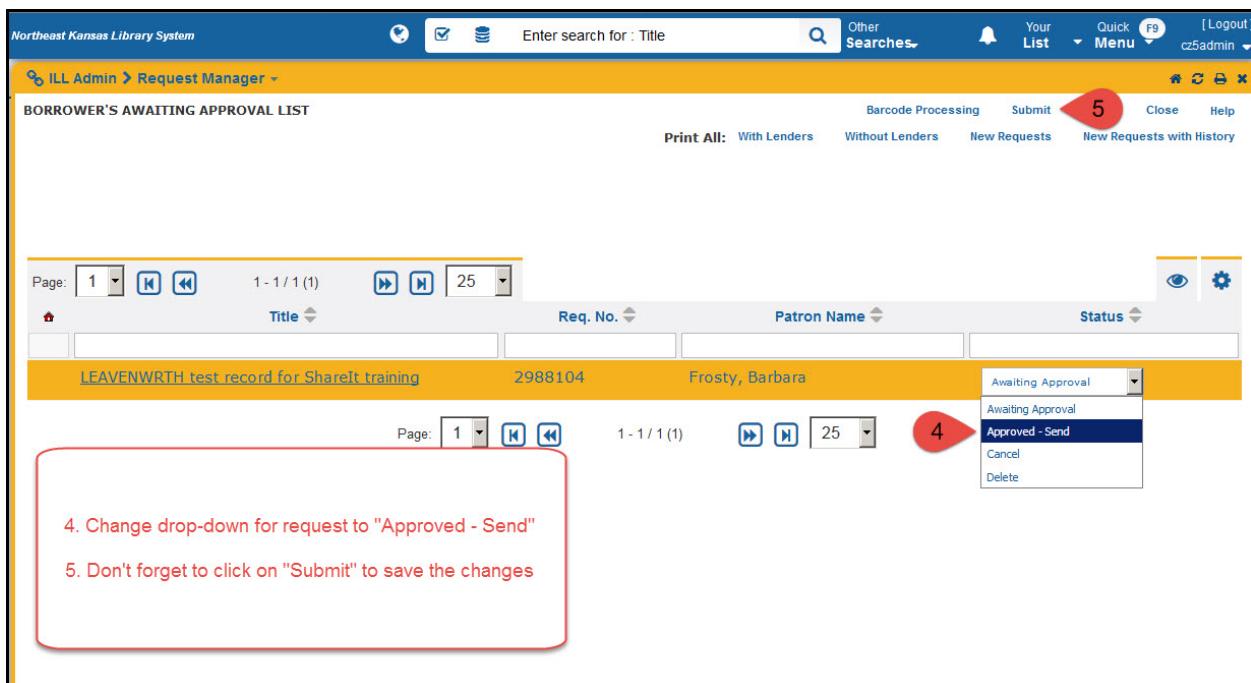


Fig. 10: Approval 4-5



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**CHAPTER  
FOUR**

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## **BORROWER REQUESTS**

These are the items you are trying to borrow from another library.

- Awaiting Approval = Your library's requests that need final approval.
  - Some libraries are configured to allow patrons to place their own ILL requests. The approval process allows staff to verify that an ILL request meets their library's ILL policies.
  - Options
    - 1. Approved - send
    - 2. Cancel
    - 3. Delete
- Not Received = An item you library has requested has been shipped but has been in transit for longer than the owning library's "Days to supply."
  - Options
    - 1. Received
    - 2. Lost
- Not-Received/Overdue = An item you library has requested had a status of "Not received" and the owning library has changed the status of the item to "Not-Received/Overdue"
  - This indicates that the owning library has probably sent an overdue notice to your library.
  - Options
    - 1. Received
    - 2. Lost
- Accepted Renewal = The owning library has approved your request to renew an item.
  - Options
    - 1. Returned
    - 2. Renewal
    - 3. Lost
- Recalled = The owning library needs an item you have requested returned before the originally agreed upon due date.
  - Options
    - 1. Returned
    - 2. Received

3. Lost

- Unfilled = Your library's request to borrow an item has been sent to all libraries that own a copy of the item and none of them are willing or able to fill the request.

– **The request will automatically be moved to Expired when the “Need by” date has passed**

– **Options**

1. Approved-Send

2. Delete

- Shipped = The item your library has requested is en route to your you.

– **Options**

- Complete = The item your library requested has been returned to the owning library and the ILL process is over.

– **Options**

1. Received

2. Lost

3. Cancel Shipped Request

- Conditional = The owning library will send the item your library has requested but they have specific conditions regarding its use (e.g. the patron can't take it out of the library, the patron cannot make photocopies, etc.)

– **Options**

1. Accept Condition

2. Reject Condition

- Received = Your library has received the item your library requested.

– **Options**

1. Returned

2. Renewal

3. Lost

- Rejected Renewal = Your library asked if an item could be renewed and the owning library said “No.”

– **Options**

1. Returned

2. Renewal

3. Lost

- Overdue = The item your library requested has been at your library past its expected due date.

– **Options**

1. Returned

2. Renewal

3. Lost

- Expired = The request your library placed for an item has not been filled by the “Need by” date specified in the original request.

– **Options**

1. Approved-Send
  2. Received
  3. Lost
- Retry = The owning library is unable to loan its items at this time but may accept your library's request at a later date.
    - **Options**
      1. Approved-Send
      2. Delete
  - Cancelled = The request your library placed has been canceled.
    - **Options**
      1. Approved-Send
      2. Delete



**LENDER REQUESTS**

These are the requests for things other libraries want you to loan to them.

- Pending = things appear here when another library requests materials from you

– **Options**

1. Pending = You need to take action on this request
2. Will Supply/In Process = You agree to fill this request but it has not yet shipped
3. Shipped - You are shipping the item
4. Retry = You can't fill the request now, but if they try again later, you might
5. Conditional = You will fill the request but the borrowing library needs to agree to specific conditions (in library use only, etc.)
6. Will not Supply = You will not fill this request

- Will Supply/In Process = things appear in this area after you ship them to the requesting library

– **Options**

1. Shipped - You have shipped the request to the requesting library
2. Retry = You can't fill the request now, but if they try again later, you might
3. Conditional = You will fill the request but the borrowing library needs to agree to specific conditions (in library use only, etc.)
4. Will not Supply = You will not fill this request

- Renew/Overdue = things appear in this area when the requesting library asks you for a renewal on an item that is overdue /or/ if an item you have shipped is overdue

– **Options**

1. Accept Renewal = The requesting library has requested a renewal and you are granting it
2. Reject Renewal = The requesting library has requested a renewal and you are not granting it
3. Recall = The requesting library has requested a renewal and you are rejecting the request and asking the borrowing library to return the item as soon as possible
4. Check in = You have received an item you sent out for loan and you are checking it in
5. Lost = The item is overdue and you are declaring the item "Lost"
6. Overdue = The item is overdue

- Pending Cancel - things appear here when the requesting library cancels a request

– **Options**

1. Confirm cancel = The requesting library has indicated that they no longer need the item - if you haven't shipped the item yet, you can use this to confirm that you have cancelled the ILL process on your end
  2. Reject cancel = The requesting library has indicated that they no longer need the item but you can't cancel the request because it's already been Shipped – (setting this option will update the status to "Will supply/In process")
- Renew Pending - Things appear here after the requesting library request that you renew the item
    - **Options**
      1. Accept Renewal = The requesting library has requested a renewal and you are granting it
      2. Reject Renewal = The requesting library has requested a renewal and you are not granting it
      3. Recall = The requesting library has requested a renewal and you are rejecting the request and asking the borrowing library to return the item as soon as possible
      4. Check in = You have received an item you sent out for loan and you are checking it in
      5. Overdue = The item is overdue
    - Returned - after a requested item has been returned, the item information will remain here for a while
      - **Options**
        1. Check in = The item you shipped has been returned

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**CHAPTER  
SIX**

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## **ADDING A TITLE TO NEXT SEARCH CATALOG FROM SHAREIT**

Many bibliographic records from ShareIt can be downloaded following the instructions here:

<https://nextkansas.gitbook.io/cataloging-training/copy-cataloging/adding-a-title-from-shareit>

These instructions are specifically geared for Next Search Catalog.



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CHAPTER  
**SEVEN**

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## **INDICES AND TABLES**

- [genindex](#)
- [modindex](#)
- [Search Page](#)