

Set-up Instructions for New SHARES ILLiad Libraries

Updated January 16, 2009

New SHARES ILLiad Libraries need to customize ILLiad as a SHARES participant. This document contains the following set-up instructions and optional enhancement customizations.

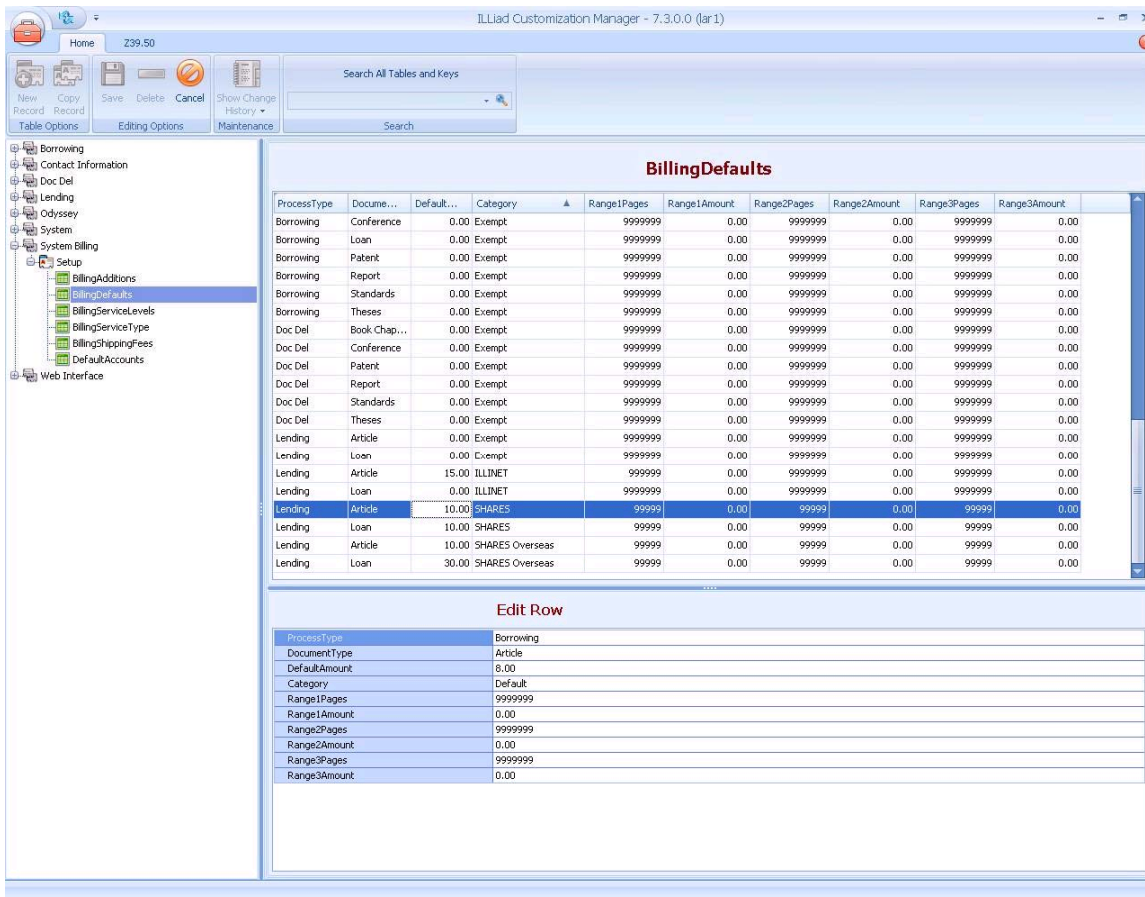
They are:

- 1) SHARES Billing Categories
- 2) Assigning New Billing Categories to SHARES Partners
- 3) Updating Records of new SHARES Partners
- 4) Updating Records of former SHARES Partners
- 5) Constant Data information
- 6) SHARES Statistical Groups (optional)
- 7) SHARES Custom Import Queue (optional)
- 8) SHARES Custom Holdings (optional)
- 9) Odyssey and the Trusted Sender

1. SHARES Billing Categories

A new SHARES ILLiad library must set up two new billing categories: one for SHARES (which charges \$10IFM for loans and copies), and one for SHARES overseas (which charges \$30IFM for loans and \$10IFM for copies). This is done in the ILLiad Customization Manager.

- 1) Open ILLiad Customization Manager
- 2) Select System Billing → Setup → BillingDefaults
- 3) Add four rows to the table: one for SHARES articles, one for SHARES loans, one for SHARES Overseas articles, and one for SHARES Overseas loans. (See the settings in the image below.)



2. Assigning New Billing Categories to SHARES Partners

Once the billing has been configured in the Customization Manager, each SHARES lender address needs assigned the appropriate billing category (SHARES or SHARES Overseas).

- 1) Open ILLiad Client
- 2) From the Menu Select Maintenance → Edit Addresses
- 3) Enter symbol or Library name to pull up the individual library record
- 4) Under “Billing Category” select the appropriate SHARES category (see image below)

The RLG Shares check box at the bottom of the window is not selected, as this only applied in the previous ISO peer-to-peer technical environment. The section on the right also includes a check box for RLG Shares but that section only applies to statistics, and thus is optional. Refer to part #6 “SHARES Statistical Groups” for more information.

Address Maintenance

Search: Symbol Address Number

Library Name: emory
 Address:
 Phone: Fax:
 Ariel Address: Priority Shipping
 Odyssey Address:

Selected Records:

LenderString	Address#	NVTGC	LibraryName	Address
EMK	1	ILL	Emory University School of Law	Library
EMM	1	ILL	Emory University	A/W Ca
EMO	1	ILL	Emory University	Oxford
EMT	1	ILL	Emory University	Pitts Th
EMU	1	ILL	Emory University	Robert
GAJEMU	1	ILL	Emory University	Emory L
RLG:GAEG	1	ILL	Emory University	Woodru
RLG:GAET	1	Lending	Emory University	Woodru

Lender Information | ISO Information

General Information:
 Symbol: EMU | Address Number: 1
 Library Blocked?
 Library Name (required): Emory University
 Phone: 404-727-6860 | Fax:
 Odyssey Address: illiad.library.emory.edu
 Override Incoming Trusted Sender
 Override Outgoing Odyssey
 Ariel Address: 170.140.209.109
 EMail Address: genill@libcat1.cc.emory.edu

Billing Information:
 Billing Category: SHARES
 Billing Address:

 Copy Charge: 10
 Loan Charge: 10
 Billing Method:
 Copyright Payee
 Override IFM
 Decline EFTS
 RLG Shares

Groups:
 CICL
 CICNotIL
 CRL
 DOC Supplier
 EFTS
 Electronic
 IL\$\$
 ILRecip
 Other Free
 Other Illnet
 Other\$\$
 Recip
 RLGShares

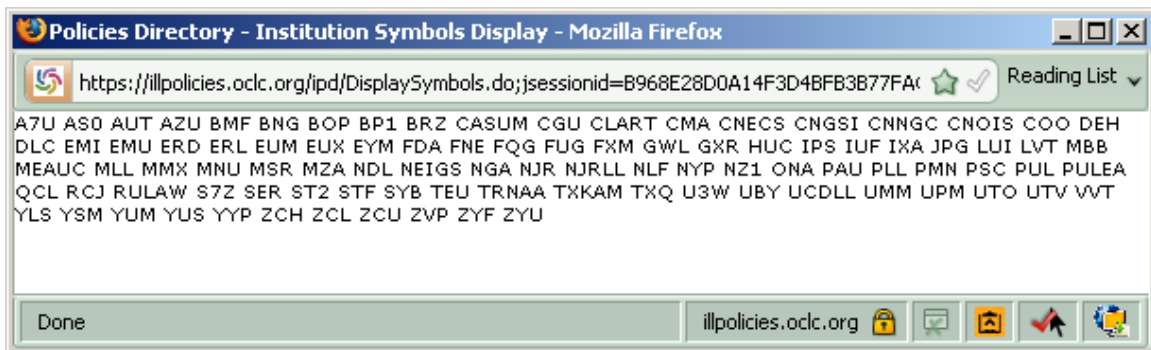
Shipping Information:
 Shipping Address (required): Robert W. Woodruff Library - ILL
 540 Asbury Cr. NE
 Atlanta, GA 30322-2870
 Default Shipping: UPS
 Priority Shipping

Buttons:

Note:

A list of SHARES symbols and their locations can be found at <http://www.oclc.org/programs/shares/partners/symbols.pdf>.

Another way to obtain a list of symbols is to search the Policies Directory (<https://illpolicies.oclc.org/>) by Group Symbol *SHRS*. Then click on *Show Members* and then *Display Symbols*: (see image below)



3. Updating Records of New SHARES Partners

When an announcement goes out on the rlg-shares-ill-l discussion list that library XYZ has joined SHARES, all SHARES lenders must change the Billing Category they have listed for that library.

- 1) Open ILLiad Client
- 2) From the Menu Select Maintenance → Edit Addresses
- 3) Change the Billing Category from Default to SHARES or SHARES Overseas, whichever applies.
- 4) For those who maintain a separate custom SHARES queue, go into the Customization Manager and add the library symbol to the Lending/Import Queues/BorrowerStatus table.
- 5) For those that maintain SHARES path/group Custom Holdings, add the library symbol to the appropriate category.

Every XYZ request from that point on will be billed at the SHARES rate previously set up in the Customization Manager. It takes us all of two seconds.

4. Updating Records of Former SHARES Partners

When an announcement goes out on the rlg-shares-ill-l discussion list that library XYZ has joined SHARES, all SHARES lenders must change the Billing Category they have listed for that library.

- 1) Open ILLiad Client
- 2) From the Menu Select Maintenance → Edit Addresses
- 3) Change the Billing Category from SHARES or SHARES Overseas to Default.
- 4) For those who maintain a separate custom SHARES queue, go into the Customization Manager and remove the library symbol to the Lending/Import Queues/BorrowerStatus table.
- 5) For those that maintain SHARES path/group Custom Holdings, remove the library symbol from the appropriate category.

5. Constant Data Information

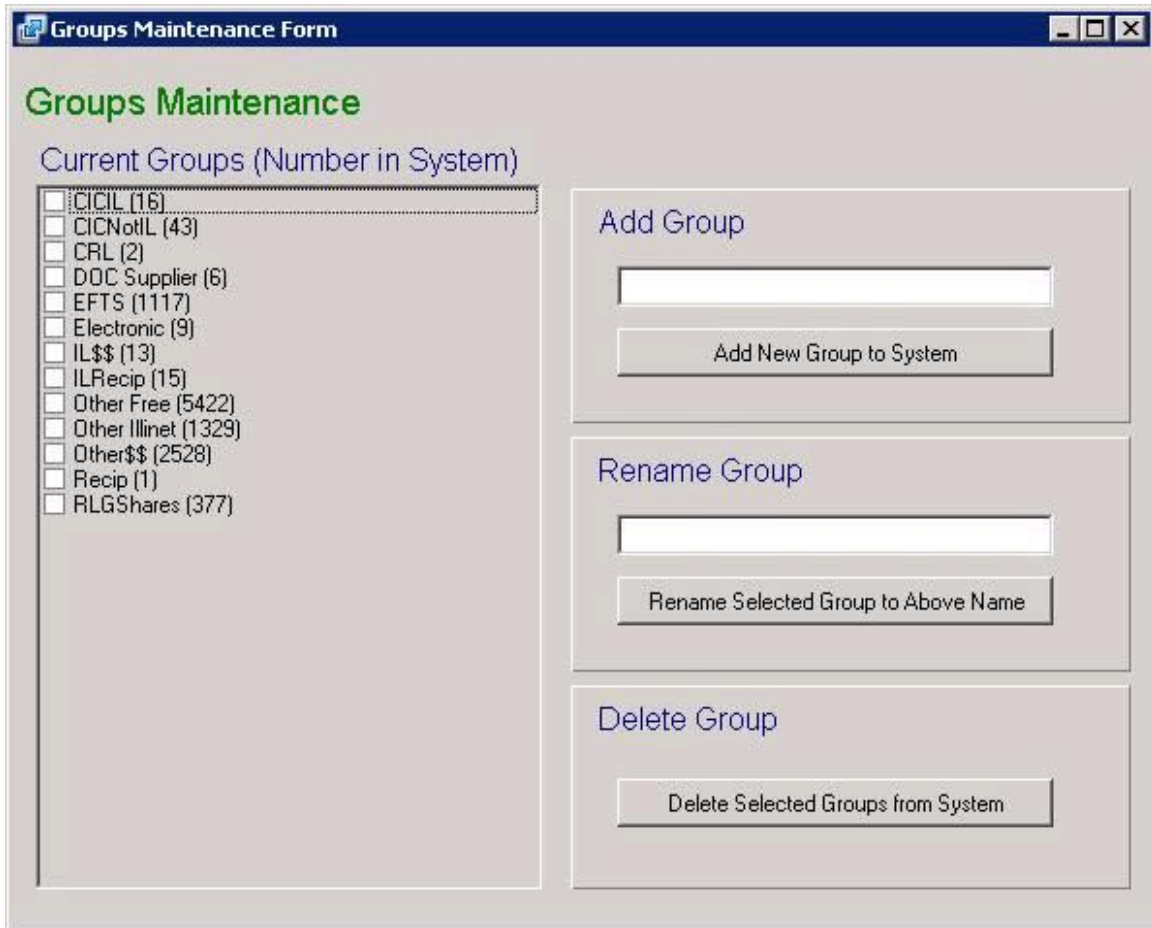
SHARES libraries should identify themselves as a member of SHARES on each ILL request. This can be achieved by adding some information to the Constant Data information.

- 1) Open ILLiad Client
- 2) From the Menu Select OCLC → Resource Sharing Settings
- 3) Select the Constant Data tab
- 4) In the Affiliation field, add SHARES (see image below)
- 5) In the Borrowing Notes field, add SHARES Member (see image below)

6. SHARES Statistical Groups (Optional)

To retrieve stats for SHARES within ILLiad, a statistical group for RLG SHARES can be set up.

- 1) Open ILLiad Client
- 2) From the Menu Select Maintenance → Groups Maintenance Form
- 3) Add SHARES in the Add Group field (see image below)



This Group can be selected when editing the address (check the SHARES box) for a SHARES library. Refer to part # 2 “Assigning New Billing Categories to SHARES Partners.”

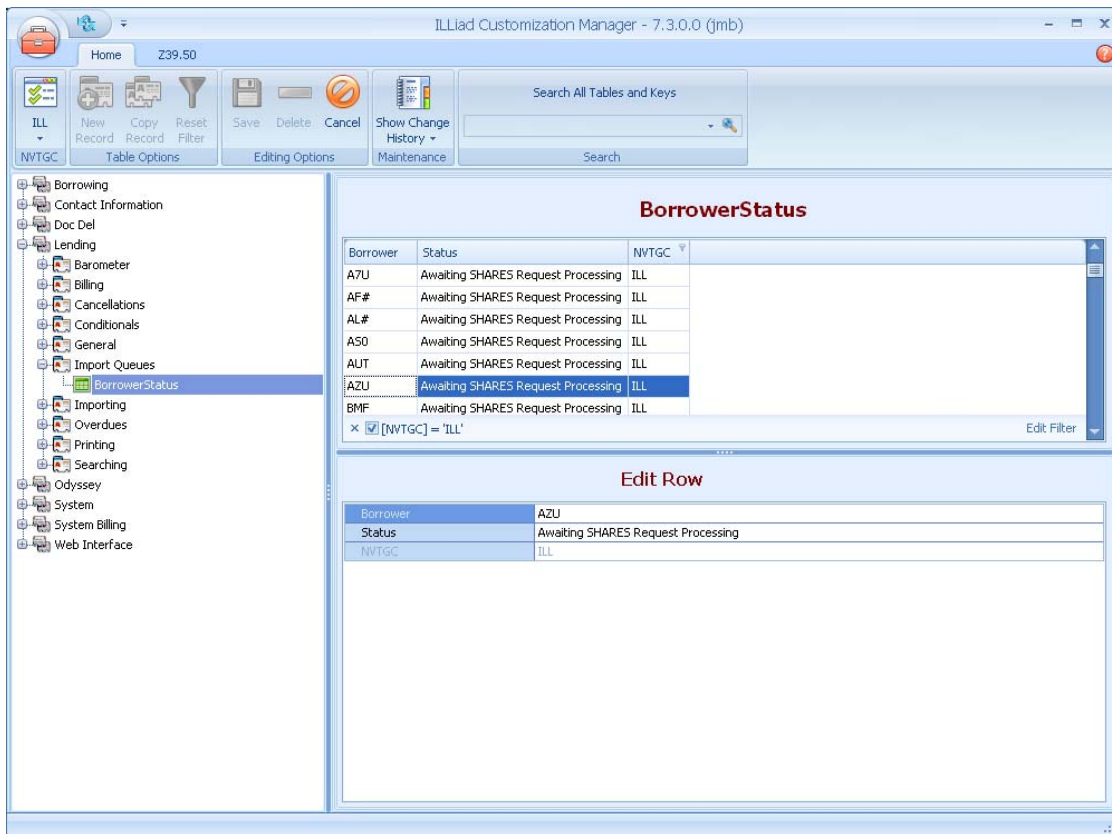
While it may seem like a lot of work to configure each SHARES library separately, it doesn't take very long to work through the list. And once it's done, it's done.

7. SHARES Custom Import Queue (Optional)

Some libraries choose to set up a custom Lending Import Queue called “Awaiting SHARES Request Processing.” They then set up the Import table so that each request from an RLG SHARES library symbol imports into that queue. This separates the SHARES requests from other incoming requests so that staff can process the SHARES queue first. This is handy for libraries that give SHARES partners top priority, and those that consider loaning to SHARES libraries items that don't normally get sent out on ILL. For those libraries that charge more (or less) to non-SHARES libraries, this queue also makes it easier to identify SHARES requests when searching.

- 1) Open ILLiad Customization Manager
- 2) Select Lending → Import Queues → BorrowerStatus
- 3) Click on “New Record” icon and add a record for each SHARES symbol (See image below).

Note that if you are a shared site, and other sites also participate in SHARES, this table will need to be updated in each site.

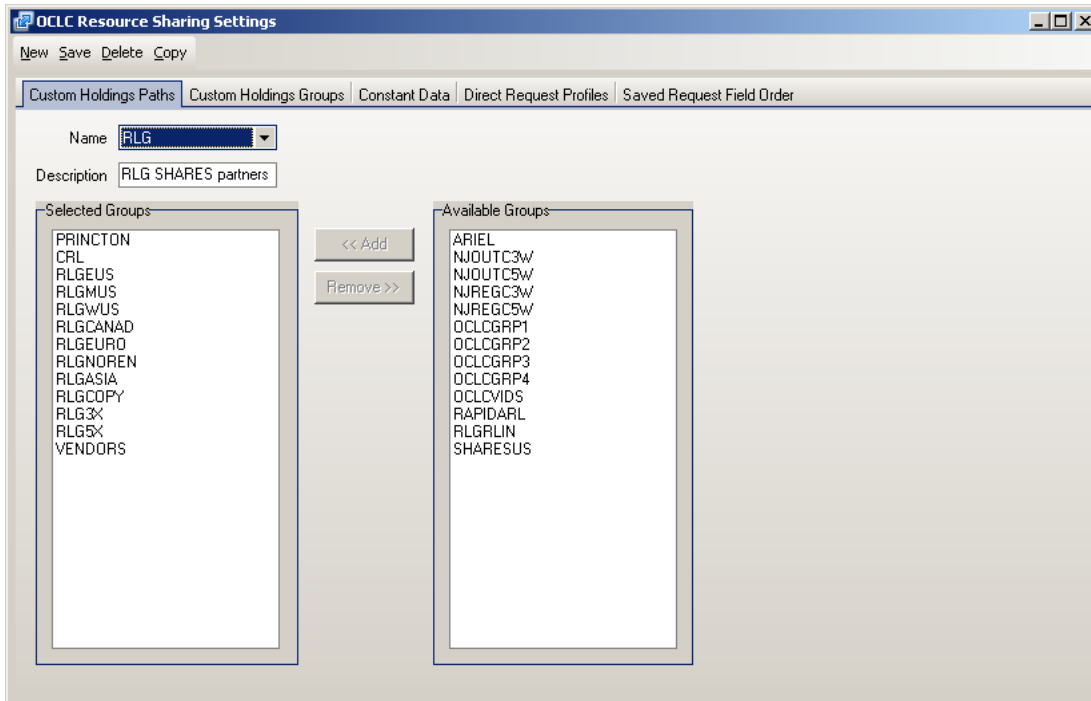


8. SHARES Custom Holdings (Optional)

Libraries new to SHARES will find that it takes awhile to become familiar with the symbols of their SHARES partners. Creating either a SHARES group in a preexisting Custom Holdings path or creating a new SHARES Custom Holdings path is one way to ensure that requests are placed to SHARES partners either first or immediately after any other consortial/free agreements the library has. Custom Holdings can be created and modified either within ILLiad or Firstsearch.

For ILLiad:

- 1) Open ILLiad Client
- 2) From the Menu Select OCLC → Resource Sharing Settings
- 3) In the Custom Holdings Paths tab, Select New to create a SHARES group (see image below)



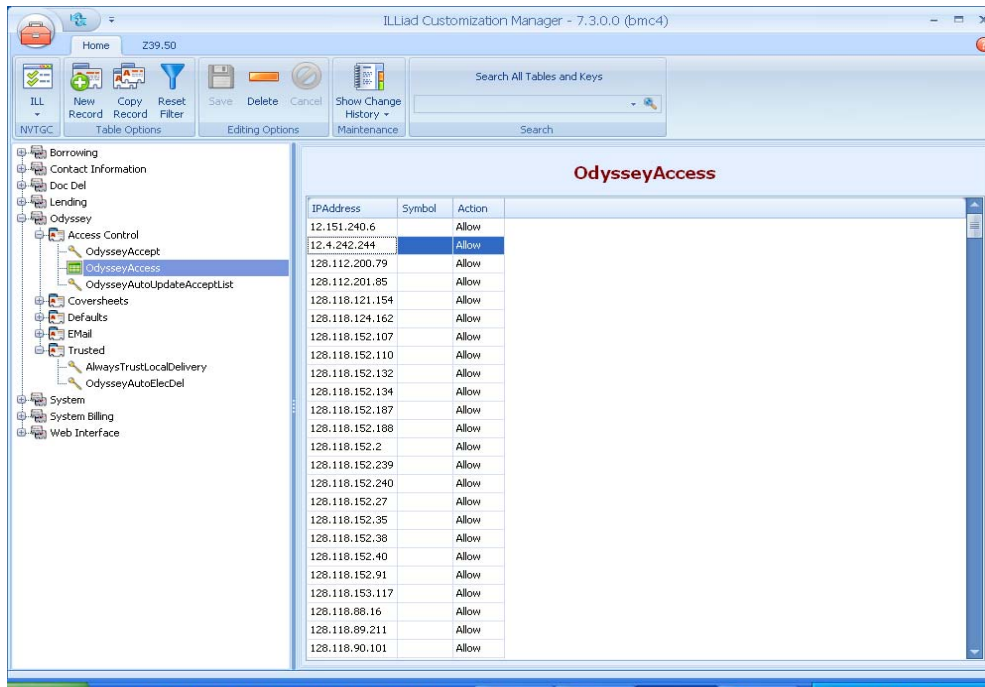
Both Constant Data records and Custom Holdings can also be created and modified in the FirstSearch Administrative Module (<http://firstsearch.oclc.org/admin>).

9. Odyssey and the Trusted Sender

SHARES libraries can use the Odyssey article delivery system within ILLiad for optimal document delivery.

Setting up “Trusted” senders (optional) will allow articles sent by SHARES lenders to automatically be delivered to your patrons without staff intervention.

- 1) Open ILLiad Customization Manager
- 2) Select Odyssey → Access Control and other keys
- 3) Review Atlas documentation for set up instructions for Odyssey (image below shows OdysseyAccesstable)



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