

Information for Participating Libraries



SRCS links together nearly 200 libraries statewide running a variety of different ILS systems using the Auto-Graphic *ShareIt* software program to provide a simple and effective user-initiated interlibrary loan for returnable materials. It works in partnership with InfoExpress courier service and the mediated IN-SHARE ILL system or their local ILL systems to make resource sharing in Indiana more efficient.

How SRCS Works

An authorized user starts by logging into their library's local SRCS interface and entering a search. For libraries that lack a live connection, SRCS checks the union database to see if requested item is listed. For the majority of the participating libraries, SRCS uses a Z39.50 connection to check each catalog in turn to see if they own the requested item, whether it is currently available and whether it is in a lendable location and format. If and only if the item is found and meets all of the above requirements, then the patron sees a *Request This Item* button. Once they click on it, their request is sent to the first library that meets all of the requirements.

On the lending library side, the request appears in their Pending file in the Staff Dashboard. They can print out a picklist that they can take to the shelf to see if the book actually is available. If it is, and they are willing to lend it, they update the status to Shipped and package it for the InfoExpress courier.

When the borrowing library receives the item, they mark it received and prep it for their patron. Once the patron returns the title, the staff marks it as returned in SRCS and packages it for the InfoExpress courier. When the lending library received it, they mark the record as complete and reshelves the item.

Set Up:

- Each SRCS library has been assigned a unique SRCS Library code. This code will be used to be used to identify your library in the database. To find your library's code, please visit [SRCS Library Codes](#). Please make a note of this code and use it in all correspondence and forms.
- **Z39.50:** The preferred way of connecting your library with the SRCS catalog is to use a Z39.50 connection. Most ILS vendors offer this connection. (When in doubt, please contact your ILS vendor).

Please use the [SRCS Form Z39.50 Profile](#) to submit the following information: ILS Vendor and system version, is the Z39.50 server hosted by the ILS vendor, Host Domain Name (either the domain name or IP address of your Z39.50 server), Z39.50 Port Number, Database

Name, and Database Login Information (If your Z39.50 server requires a USERID and Password). If your Z39.50 target database is protected by a firewall, please see the **SRCS Form Z39.50 Profile** for configuration requirements.

Libraries using Z39.50 will also need to provide precise information about what is lendable and what is not within their library. The easiest way to do that is to generate a spreadsheet containing *all* of your shelving locations and then label each line as YES (as in, we will loan these materials) or NO (as in, these materials are not loanable). If you need help in extracting a full list of your locations, contact your ILS vendor.

Here is an example of what we need:

Library	Location Code	Description	Loan?
PORTR-VAL	vgbre	Valparaiso Genealogy Reference	No
PORTR-VAL	vgfre	Valparaiso Genealogy Microforms Ref	No
PORTR-VAL	vjp	Valparaiso Kids Periodicals	No
PORTR-VAL	zzzzz	Default Location	No
PORTR-VAL	babmy	Bookmobile Adult Mystery	Yes
PORTR-VAL	babnf	Bookmobile Adult Nonfiction	Yes
PORTR-VAL	balmy	Bookmobile Adult Large Print Mystery	Yes

Library administrators also will have the opportunity to block entire classes of materials using their MARC format, such as Microfilm or Audiocassette, in the Maintain Participant Record on the Staff Dashboard. Libraries who are loading their MARC records into the union database can skip this step. Everything loaded into the union database is loanable.

- **OCLC**: For libraries running OCLC WMS, their ILS does not support the Z39.50 protocol, however it uses an API instead that provides a similar connection. All we need to make this connection is the library name, the SRCS library Code and OCLC symbol.
- **UnionDB**: If your ILS vendor *does not* offer a Z39.50 connection or you decide not to use it, your library can still participate in SRCS by uploading a file of MARC records for the items that you are willing to lend through SRCS. Please use the **SRCS Form UnionDB Profile** to submit the following information: Number of Records, Record type (i.e. - USMARC-21), Call Number, Call number tags/subfields, special processing instructions (if needed), location detail, Location tag/subfield, location abbreviations found in above tag/subfield and translation, Record Exclusions. Please note that everything loaded into the union database is loanable.

NCIP

NCIP is a specialized communication protocol which allows ILS systems to communicate with each other. NCIP is not required for running SRCS, but it can streamline some of the processes. In the section How SRCS Works above, if the library is running SRCS, whenever the staff

member updates the item status in SRCS, such as to Received, NCIP updates the status for that item in your regular ILS.

NCIP also links with your ILS to allow your users to log into SRCS using the same userid and password that they use to log into your local catalog.

Inquire with your ILS vendor to see if they offer NCIP and what it would cost. The State Library cannot pay for this add on.

Patrons

Users will have to log into SRCS in order to place requests. There are four ways to provide access for your users.

1. **NCIP**. This optional piece of extra software allows SRCS to communicate with your ILS. Among other features, NCIP queries your ILS when a patron logs into SRCS using their local credentials and recognizes whether that patron is authorized to place requests. For libraries running NCIP, their local lending defaults take precedence over the lending defaults set in SRCS.

Interested libraries should contact their local ILS provider on the availability and cost for NCIP. NCIP is **not required** to participate in SRCS.

2. **SIP2**. This is also optional, supplementary software which can be useful for libraries who are not using NCIP and wish to have their patrons initiate their own ILLs without having to create and maintain user accounts manually. SIP2 allows SRCS to conduct a patron lookup against the local ILS to verify if that patron is in good standing, but does not offer the additional services offered by a NCIP connection. Interested libraries should contact their local ILS provider on the availability and cost for SIP2 software. SIP2 is **not required** to participate in SRCS.
3. **Batch Load**. User accounts may be loaded into SRCS using a CSV batch file. The import file provides a means for importing multiple user records to your library's database. Each line in the file contains the data for a single user record. User records are separated by line breaks. This import file can be prepared using any standard text-editing utility (such as WordPad or Notepad), or it can be generated from a spreadsheet utility, such as Microsoft Excel. Your import file must be properly formatted before beginning the import process.

Data fields in the import file must be entered in the following order: username, password, firstname, middleinitial, lastname, address1, address2, city, state, zipcode, country, email, telephone, faxnumber, ipaddress, status (Active or Inactive), grouptype, defaulttype.

This completed file needs to be sent to <ftp3.auto-graphics.com> via ftp for uploading. Please contact Ruth Castillo (rmc@auto-graphics.com) for the username and password. .

Patron maintenance may be conducted manually directly within SRCS/SHAREit on a case-by-case basis; or, Auto-Graphics can script patron changes as desired. For example, "please

delete all of the listed patrons”; or, “please add the following batch of patrons”; etc. Again, contact Ruth Castillo (rmc@auto-graphics.com) for details.

4. **Manual Entry.** During training, participants will be taught how to create and edit individual user accounts. Typically, libraries will go live by conducting staff-initiated ILLs until they are familiar with the system. Then, they will usually allow a handful of patrons to initiate their own ILLs using patron accounts created manually for them by the library staff. Once they are comfortable with the process, they may then elect to use one of the validation processes listed above.

Policies

Each participating SRCS library may set their own lending policies, within the limits recommended by the ISL Resource Sharing Committee. These recommendations include:

Minimum loan period:	21 days
Staff Mediated Requests:	OFF
Days to Respond:	Equal to the number of days your library receives InfoExpress service, with a maximum 4 days

The full list of these recommendations is available at [Manual: Recommended Default Settings for SRCS Libraries.](#)

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