Check-up on the health of your SHAREit using our checklist below & the workflow infographic options available (next page). Unsure if you've activated any features? Need help activating or updating?
Contact us! https://illumebc.ca/about-us/contact-us

☐	**PI-ILLs** with **customised simplified patron forms**. Make it easier for your patrons to search & submit their requests without mistakes. SHAREit V6 now includes a new easy drag & drop forms interface!
☐	**Privacy Disclaimer Notice**. Provincial law requires a privacy disclaimer notice display before collecting personal details (eg. Last name) from your patrons.
☐	The **Patron Tracking** feature for PI-ILLs includes customised login & status messages. Update within your **ILL Admin > Patron Tracking** to customise the messages or contact info.
☐	**Live Shelf Status** checks save ILL Staff time by automatically deflecting requests for unavailable items allowing ILL Staff to focus on requests *you can* actually provide.
☐	**Lending Policy** automatically rejects requests for certain formats or material types which saves ILL Staff time rejecting requests for formats you do not loan (eg. DVDs).
☐	**Guest Request ILL Limits** for **PI-ILLs**. Libraries can set limits (eg. 5 active) based on patron name (First name and Last name) and the Password/PIN entered during request creation.
☐	**ILL 2nd notice**. Add a notice to your patron forms, that displays after they submit requests, with important ILL delivery and restriction information (eg. fines; delivery expectations).
☐	**Branding** of the SHAREit home page is available including library logo, contact information, and ILL Restriction information.
☐	**Search Resources** for both Staff & Patrons should be reviewed yearly to make sure you're offering the best available search target defaults, including the newly available LAC Voilà Z39.50 search target.
☐	**Union Database (UDB) updates.** When was the last time you uploaded your records to the UDBs? Frequent record uploads allow borrowers to accurately locate items available for ILL. Please contact us with suggestions or record errors for the upcoming Database Clean-up Project projected for 2020!
☐	**OpenURL.** Item not available in your OPAC? Add an OpenURL link to Bibliocommons (or many other interfaces) that redirects patrons to SHAREit to locate search results instead.
☐	**Holiday Closures**. Update your **ILL Admin > Maintain Participant Record > Holiday List** with any closures to deflect Lender requests while your library is unavailable.
☐	**Patron Email Notices.** Save time communicating with your patrons about status updates using automatic Patron Email Notices (does not require PI-ILL). Ask us for assistance!
☐	**Staff Email Notices.** If your site doesn't login to SHAREit daily, Staff Email Notices allows staff to receive notifications direct to their inbox about new requests and other important status changes.
☐	**Blocked Lenders List.** Under your **ILL Admin > Maintain Participant Record > Blocked Lenders** your library can stop the ERTI Smart-build from automatically adding charging libraries (eg. UVic) to Lender List builds.
☐	Recent **Maintain Participant Record** assessment of settings that impact software calculations/processes, including your **Days to Respond (DTR)**, **Days to Supply**, **Days to Return**, **Days Requests are Processed**, **Set Default Need-by Date, Owned by My Librar**y, and many more.

Borrower Library & Lender Library Workflow Cycle

Patrons

Initiate ILL requests via Email, Telephone, In-person or Internet...

Library Staff

OpenURL → Catalogue & Databases

Patrons search & request directly – can even use their smartphone!

Patron-Initiated ILLs in Illume

Save Library Staff time skipping the first 2 steps!

Many options to customise:
- Patron Forms
- Privacy Disclaimer Notice
- ILL Restrictions Notices
- Track ILL Requests Messages
- Patron Email Notices
- Guest Request Limits & more!

SEARCH & REQUEST

illume

ERTI SMART-BUILD &
Your Search Targets/Resources automatically builds your Lenders!

LENDER CODES for up to 93 different Public & Post-secondary libraries can be added.

MANUALLY edit your Lender List build before you Approve the request (optional).

EDIT & APPROVE the REQUEST

ILL Review Save staff time by easily editing patron created requests to assign a different "better" record and automatically rebuild lenders.

Auto approve with future new features: NCIP & DPR!

PENDING

The system checks library codes in Lender List build for available items.

Available!

Lending Policies
Save Staff time by automatically rejecting all formats you don't loan!

Live shelf Status
Save Staff time by automatically rejecting all requests for unavailable items at your library!

Checked-out

Will not Supply

Returns to Lender List build for next lender

Will Supply

LENDER Library ILL Staff always MANUALLY decide if an item can be loaned.

✓ Allowable Format   ✓ Available to Loan

MANUALLY REJECT based on Format/Material Type (eg. DVD) or Availability (eg. Checked Out).

OR

AUTOMATICALLY REJECT by adding the Lending Policies & Live Shelf Status features below!

Patron Notification

1 Activate Track
2 ILL Requests
3

System Patron Email Notices

SHIPPED

Multiple Library Staff process shipped Returnable & Non-returnables so patrons receive their requests in a timely manner!