

## Illume (SHAREit) and NCIP Borrower Workflow

### Patron LOGIN or CREATES REQUEST

*NCIP "LookUpUser" message validates the patron's account against your ILS*

### Staff CREATES REQUEST for Patron

*NCIP "LookUpUser" message validates the patron's account against your ILS*

- Requests aren't created if the Patron **does not have a valid account** in your library's ILS, as the patron cannot be authenticated by NCIP.
- Depending on your ILS, the **Patron Request Limits** option *may* also be available in SHAREit (eg. concurrent max requests allowed) to block patrons at the limit. [Tips below](#) for more info.
- **Privacy Disclaimer:** If this is the first time the patron or staff member is accessing the patron account via NCIP, their patron account details will be transferred from your ILS into SHAREit to create the ILL patron account.
- Update both your **Login** page and the **SHAREit request form "Disclaimer Notice"** with a **Privacy Disclaimer** letting patrons know their info will be used in SHAREit for ILL purposes. More info and examples available in our guide [\[link\]](#).

**APPROVED – SEND:** ILL Staff "**Approved – Send**" the **Mediated** request, as it's already been authenticated via NCIP against your ILS.

**Tip:** Interested libraries can also explore **Unmediated Patron requesting** if desired! Please note that we recommend setting up a [Borrowing Policy](#) if so. But Patrons can also still request items your library owns unless the separate **Network Lending feature** is set-up.

**RECEIVED:** Item Arrives at your Library and is updated to '**Received**' in SHAREit by ILL Staff.

*NCIP "AccepItem" Message sent to ILS which creates the **Temporary item bib record** AND places a **Hold on the record** for the patron. **Tip:** Scan the Item Barcode into the "**Item Barcode (Borrower)**" field to be used during the creation of the temp bib record & for check-out.*

- Note this is likely a significant workflow change as most libraries would check-in the item **FIRST** via their ILS!
- While it's recommended that NCIP **check-in** and **delete the temporary record** (if possible), via the **Returned** message **first** in SHAREit. If your library instead opts to discharge via your ILS first, there will just be an NCIP error for Staff to ignore. Check-out the [Tips below](#) for more information.

**RENEWAL ACCEPTED:** Your ILL Staff request a renewal and if it's approved, the Lender updates request to "**Renewal Accepted**".

*NCIP "RenewItem" message (if supported) sends a renewal update to your ILS including a new due date.*

Patron picks-up item from Circulation and it's checked-out as usual via the ILS and temporary bib record.

**RETURNED:** Patron returns physical item AND Circulation Staff or ILL Staff must update item to "**Returned**" in SHAREit first!

*NCIP "CheckInItem" message sent to your ILS to **discharge the item** from the **patron's account** & **Delete the Temporary record** (if possible with your ILS version).*

## Illume (SHAREit) and NCIP Lender Workflow

**LENDER > PENDING:** Borrower library request arrives in SHAREit. **Tip:** Recommend updating requests to “**Will Supply/In Process**” to give ILL Staff additional time to reply to requests before they expire from Pending.

*NCIP “LookUpUser” message checks if there’s a Library-as-Patron appropriate account.*

*\*NCIP “CreateUser” message (if supported) creates a Library-as-Patron account in your ILS.*

*\*NCIP “RequestItem” message (if supported) places a Title hold on the item in your ILS.*

*\*Which Lender NCIP messages are supported vary widely depending on your ILS (eg. SirsiDynix Horizon).*

*Contact us for compatibility charts or your ILS vendor for more info.*

**WILL NOT SUPPLY:** If ILL Staff update the request to “**Will not Supply**” OR the **Days to Respond** (eg. 4) expire, the request moves on to other lenders (if available). **Tip:** We recommend setting up [Live Shelf Checks](#) to save staff time rejecting Unavailable items. The automated [Lender Policy](#) should also be setup to indicate if renewals are allowed.

*\*NCIP “CancelRequestItem” message (if supported) cancels the hold on the item in your ILS.*

**SHIPPED:** If ILL Staff update the request to “**Shipped**” in SHAREit, then the item is charged/checked-out to the Library-as-Patron account. More [tips on library-as-patron](#) accounts.

*NCIP “CheckOutItem” message charges item to the library account set-up via NCIP. Important [tip for items with Multiple Copies](#) and the Title (not Copy) hold placed by NCIP.*

**RENEWAL ACCEPTED:** Borrower library requests a renewal from you and your ILL Staff approve & update the request to “**Renewal Accepted**” in SHAREit.

*\*NCIP “RenewItem” message (if supported) sends a renewal update to the ILS.*

Item arrives at **Borrower** library and is updated to “**Received**” in SHAREit and supplied to their patron. Patron returns item and ILL Staff at **Borrower** library update request to “**Returned**” in SHAREit.

*No NCIP messages are sent from SHAREit to your ILS at this time unless a Renewal is requested.*

- Note this *may* be a workflow change, as some libraries check-in the item at Circulation after ILL sends it back.
- But in order for NCIP to **check-in** and **discharge** from the library-as-patron account in your ILS, requests need to be marked as “**Check In**” first in SHAREit.

**CHECK IN:** Borrower library physically returns item and ILL Staff update it to “**Check In**” in SHAREit.

*NCIP “CheckInItem” message discharges item from the library-as-patron account.*

## NCIP Borrower & Lender Workflow Tips

Tips from our pilot libraries related to NCIP workflow or ILS configuration. Thank you to **Prince George Public Library** (BPG) and the **Greater Victoria Public Library** (BVI) for volunteering to be the first libraries to set-up NCIP (with SirsiDynix Symphony) in the Illume consortia!

Please note that all NCIP set-up costs and annual maintenance fees have been waived in our current SHAREit Auto-Graphics license.

### Borrower Workflow Tips:

- **Patron Accounts:** Depending on your ILS, only certain information from your ILS may be pulled into the permanent patron account in SHAREit. For example, SirsiDynix Symphony pulls in **Library Barcode** (becomes the Username or Barcode in SHAREit), **PIN**, **Lastname**, **Firstname**, and **Email**. *Currently Phone number or Address may not be pulled in.*
  - **Library Barcode Updates:** Currently **Administrators** or **Illume Support** cannot update a **Username/Barcode** on a SHAREit account directly. This means if a patron's Library Barcode is updated in your ILS (eg. they lost their card and got a new one), then any in progress requests may no longer work correctly via NCIP (eg. can't be checked out to the patron because the barcodes now mismatch).

**Administrators can submit a request to Illume Support for Auto-Graphics to update an existing patron account to a new Library Barcode.**
  - Alternatively, Staff can manually complete in-progress requests or temporarily revert the patron's barcode to the NCIP version. And then patrons can login to SHAREit via their new Library Barcode and a new account will be created for them. But they will no longer be able to access/authenticate their old SHAREit account or see the request history. We recommend that Admins delete old accounts in User Admin > Manage Users.
- **Patron Logins:** With NCIP, patrons will login via the "Login" link same as Staff do. We recommend libraries update their UX Admin Settings and their Illume home page to provide tips to patrons on how to Login. More information in our FAQ here: <https://illumebc.ca/faq-login-text>

If desired, Admins can also allow Guests to search and see the request button (via the "Guests" option on the "Show Request This Button" setting; but then force Guests to login by turning off the "Access ILL Request" for "Guests" option.

- **Patron Request Limits:** Depending on your ILS, the **Patron Request Limits** option *may* also be available in SHAREit (eg. concurrent max requests allowed) to block patrons at the limit. This requires the ILS to send your desired patron category (eg. Adult, Teen or Onecard) in the "**AgencyUserPrivilegeType**" NCIP message. If this is correctly sent to SHAREit via your ILS, then administrators can configure each desired category with appropriate limits to match local policies.

**Important Note:** If **Patron Request Limits** are activated, the **SHAREit** system is **hard-coded** to **automatically reject requests** from **patron** and **library-as-patron** accounts that are **Expired**, **Blocked** and **Delinquent**. Many libraries DO NOT wish Delinquent (eg. Fines only) accounts to be blocked by default

but currently they cannot be excluded from blocks if this feature/option is activated. We will be submitting an Enhancement request, for end-of-year customer voting, to the vendor Auto-Graphics to allow libraries to configure whether Delinquent accounts should be blocked or not by default.

*As far as we're aware, currently only Innovative Interfaces Polaris sends this information correctly to SHAREit. SirsiDynix systems currently do not send the desired category information in this field.*

- **Borrower Check In:** When an item is returned by your Patron, normally it is Checked into your ILS by Circulation Staff and discharged from the temporary bibliographic record created by NCIP. But this creates an error with NCIP as the “**Returned**” message triggered via SHAREit sends the NCIP “**CheckInItem**” message that discharges the patron’s account from the temporary bibliographic record and deletes it (if your ILS allows).

**Note this is likely a significant workflow change as most libraries would check-in the item FIRST via their ILS!**

- **Recommended Workflow:** We recommend either training all Circulation Staff to update the item to “**Returned**” in SHAREit OR train Circulation staff to NOT check-in ILL items and instead return them to ILL Staff to be updated to Returned (may result in the item remaining on a patrons account for a few days after physically returned).
- **Alternate Workflow:** If it is better for libraries and their patrons to check-in the item at the Circulation Desk first before returning to Interlibrary Loans, then all temporary bibliographic records will need to instead be manually or batch deleted. *As many ILS systems like Symphony require Batch Deletions of these records anyways this may not be a large issue.*

If the item has already been discharged from the patron’s account, when ILL Staff update it to “**Returned**” in SHAREit they will see an **NCIP error message** as follows: **Notes: NCIP error: NCIP CheckInItem: Item Not Checked Out; Barcode Id; XXXXXXXXXX;**

Please note that this is easy to ignore (does not require acknowledgement) and does not impact any additional NCIP messages as the NCIP process is complete once the item is Borrower > Returned.

But you *may* receive questions from ILL Staff at Lender libraries confused about what the NCIP error message means for them (it means nothing and can be ignored) that you will need to respond to!

- **Borrower Temporary Bibliographic Records:** When a borrowed item physically arrives, we recommend that ILL Staff scan the Item Barcode (eg. VPL’s barcode sticker) into the “**Item Barcode (Borrower)**” field on the SHAREit request before marking it as “**Received**”. This will allow NCIP to pass that library barcode into the temporary bibliographic record it creates via NCIP when the item is received, rather than the default “**ILLREQUEST#**” info.

Your ILS system should then have a usable item barcode on the temporary record that CircStaff can use to quickly and easily check-out the item to the patron. Otherwise, ILL Staff or CircStaff will need to manually update the temporary bib record created to have a local item barcode instead for check-out purposes.

- **Pickup Location:** With **NCIP version 2** messaging, the SHAREit software can also send the Pickup Location information. *We have not yet been able to test this new option as both pilot libraries are using NCIP version 1 messaging, as SirsiDynix Symphony does not have an option for NCIP version 2 messaging.*

Please note that according to Auto-Graphics all SirsiDynix libraries only use NCIP version 1 messaging even if you have a SirsiDynix NCIP version 2 server.  
*Please consult further with your vendor as needed.*

- **Currency Configuration:** For SirsiDynix sites, you *may* need to update your ILS NCIP configuration setting to USD for the “AcceptItem” message to work correctly. Please contact SirsiDynix for further information.

### Lender Workflow Tips:

- **Lender Policies & Settings:** When NCIP is activated, multiple SHAREit settings for Lending are subsequently ignored including those related to your [Lending Policy](#) and **Days to Return** etc. Options such as **Due Dates** and **formats loaned** are instead handled by your ILS system policies.

Auto-Graphics recommends creating different circulation policies that will be applied to the “library-as-patron” accounts when using NCIP. For example, longer loan periods, longer renewal periods/number of renewals, higher number of check-outs and ILL limits, higher fine limit before Delinquent/Blocked or no fines.

- **Lender Title Holds:** When a request arrives in **Lender > Pending**, the NCIP “RequestItem” message (if supported by your ILS) will place a **Title Hold** on the item even if other Holds are already existing.

We recommend that NCIP libraries first set-up [Live Shelf Status checks](#) to auto-reject requests for Unavailable items such as those with already existing holds. Otherwise ILL Staff will need to discharge the Hold via NCIP when the request is rejected with “**Will not Supply**” in SHAREit.

Please also note that SHAREit places a **Title Hold** on the item *not* a **Copy Hold**.

- If there is only 1 copy of the item at your library then SHAREit will check-out that only copy when ILL Staff update it to “**Shipped**”.
  - But if there are **multiple copies** of the item at your library, ILL Staff should **scan the Item Barcode** on the exact copy/item they have in hand into the “**Item Barcode (Lender)**” field on the request *before* updating to **Shipped** in SHAREit. This way the correct copy is checked-out via SHAREit and the “**CheckOutItem**” NCIP message. *Otherwise SHAREit will not know which Copy in your ILS to check-out and will pick a random copy.*
- **Library-as-Patron Accounts:** NCIP will create a new **library-as-patron** account for each **Borrower library** that tries to request an item from you as a lender in SHAREit. When a request arrives in your **Lender > Pending** the NCIP “**CreateUser**” message creates the specific account (eg. BVA) if it does not find one existing already.

SirsiDynix Symphony libraries have found that previously manually created library-as-patron accounts do not work with NCIP. NCIP only seems to

recognize the accounts it creates itself in Symphony. We recommend libraries manually delete existing library-as-patron accounts in their ILS if they see an error message. *Please note that while Auto-Graphics has said NCIP can use generic library-as-patron accounts, but we have not been able to confirm this is true. Please plan to have individual library-as-patron accounts for each SHAREit borrower.*

- **ILS Hold Messages:** For your library-as-patron accounts, you may want to double-check that no ILS emails (eg. Hold emails) are triggered/sent.
- **001 Fields:** Records in an ILS that are missing the 001 MARC field result in errors when NCIP tries to place the **Lender Hold** on the item: **NCIP error: This request has no bibliographic id supported by the AGent RS NCIP feature - lender XXXX skipped.**

We recommend that libraries run a report to ensure that all records have 001 fields and update as needed. Requests can be updated on a case-by-case basis if the Borrower library can re-submit the request after the lender fixes the record. *Or allow libraries to bypass NCIP by placing a Blank Request form (more information below)*

- **Blank Request Forms:** Same as with Lending Policies and Live Shelf Status checks, we recommend that NCIP libraries activate the “**Blank Request - Disable NCIP Function**” setting to “**Yes**” in **their ILL Admin > Participant Record** to allow Borrower libraries to bypass NCIP errors via the blank request form if needed.

Interested in testing your ILS with NCIP set-up and SHAREit? Please contact us to configure one of our NCIP test sites together. ~Illume Support