



Seven Steps to Setting up your FollettShelf

1. Spend a few minutes reviewing FollettShelf features
 - a. Go to www.follettshelf.com/features and review the videos to familiarize yourself with the features available through the FollettShelf.
2. Change your administrative password
 - a. Click on the FollettShelf URL you received in your admin credentials email from Follett.
 - b. Sign in with the admin username and password provided
 - c. Click on **Setup** in the top-right corner of the screen
 - d. Under **Manage Patrons** enter your admin username in the **Find** box and click **Search**
 - e. Click the **Edit** button and on the next screen enter your new password in both the **Change password** and **Confirm Password** boxes. Click **Save**.

*We strongly urge you not to change the username of the default admin account. If you require an admin account with a different username, we recommend that you create a separate account with admin rights.

3. Set your access levels
 - a. View the Access Levels video on www.follettshelf.com/setup
 - b. Setting up access levels
 - i. Define your Guest accounts timeout, login ID and password
 - ii. Define how logged in patrons can checkout eBooks
 1. Most customers disable the ability to checkout download to computers and only checkout online. This is recommended for your initial setup.
4. Setup your Policies
 - a. Define your Patron types
 - i. Name each patron type (i.e. student, teacher, staff etc.), enter the maximum number of eBook checkouts each patron type can have, and set the loan period length (in days) that each patron will be able to have an eBook for is based upon the circulation type assigned to the eBook.
 - b. Define your Circulation Types
 - i. Each circulation type can have its own loan period (examples: Reference, General), which will assign the length of the circulation based upon their patron type.

5. Import Patrons
 - a. If you choose to have patrons use unique logins for the FollettShelf, to allow eBooks to be checked out, then review the import patrons video on www.follettshelf.com/setup
6. Place the FollettShelf link on your website
 - a. Provide your webmaster with one of the FollettShelf logos
 - i. <http://www.aboutfollettebooks.com/download.cfm>
 - b. Provide your webmaster with the FollettShelf URL you received in the admin credentials email
7. Direct patrons to use the FollettShelf
 - a. Your patrons can go to the FollettShelf via the link on your website or the Desktop.
 - b. Patrons can log in using either the Generic Username and Password or their unique username and password.