

CSU Testing and Training Script

Created by: Anya N. Arnold

Approved by: Resource Sharing Governance Task Force

Current as of: April 4, 2017

This document provides both a testing and training script. This document will give an outline of the most common requests and fulfillment methods. During testing and training if a result happens that is not the expected then log a salesforce case (process is listed below).

Prior to Testing

-
- Set up printing -(add Chris's Documents)
- Fill out google doc with items
<https://docs.google.com/spreadsheets/d/1eD23n4FkEAmRG9MYqRY-IV5F0V6PO4WIFsKNBfcVafw/edit?usp=sharing>
- Confirm the roles that they need to have (Fulfillment Services Manager or Operator, Scoped to whatever your Resource Sharing Library is. People will have to know what they have designated as their resource sharing library.)
- Confirm that their authentication for Alma is working
- Confirm that they can see the following functions:



Resource Sharing
Lending Requests
Borrowing Requests
Receiving Items
Shipping Items
Partners
Rota Templates

Logging Issues

- Create an email to the local library Project Manager(PM) to submit a salesforce case.
- In that email they should clearly state the following:
 - External Request ID : XXXXXXXX
 - Date of Request : April XX, 2017
 - Patron Primary ID: XXXXX
 - Primary ID of the Staff user: XXXXX
 - OCLC #/ and Bib info of items requested:XXX
 - Item Barcode: XXXXXXXXXXXXXXXXX
 - Detailed written or video description of what happened and what was expected to happen.

- The email should ask the PM to attach the tester's name and email into the case under other resources
- The email should ask the PM to attach Megan Drake's name and email into the case under other resources
- The email should also ask the PM to attach my name and email address (aarnold@calstate.edu) to the case under other resources.
- Then send the email to the PM.
- The PM should then log the case on behalf of the tester and the tester, Megan, and I should receive an email with the case number and any and all updates that are made to the case thereafter.

Patron Actions

- Patron logs in to home library Primo
- Searching home library Primo and cannot find an available local copy, or it is not owned local library for several types of items
- Sees that other libraries in the CSU hold the item
 - Clicks on Request Link
- Request form displays
- Patron places a request for the item
- Screen displays that a request has been sent

Types of items to be requested

- Items that are held by local library but not available
 - Single Book
 - Multi Volume Book (request a specific volume)
 - Media item
 - Etc
 - Item not held by anyone in the group - open url email to be sent. Request is placed through Illiad
- Items that are not held by local library
 - Single Books
 - Multi Volume Book (Request a specific volume)
 - Media item
 - Etc
 - Item not held by anyone in the group - open url email to be sent. Request is placed through Illiad

What will be seen in Primo between go live of OneSearch and go live of CSU+

Lending Workflow

- Log into Alma
- Lending - Unassigned
- Print Print Slips/stickers for new items
 - Print Slips have
 - Name of service
 - Logo
 - Barcode of Request ID in (number and in graphic)
 - Title of item
 - Location(s) of item
 - Name of Patron
 - Which library the Patron belongs to
 - And comments added by the patron the the request from
- Print Slips/Stickers are used to retrieve the item
- Sticker can be place on item as it is pulled off the shelf. If using a pull slip, place inside book.
- The items are brought to the library identified P2P work-space
- Items are scanned into shipped status
- Shipping variations are expected
 - Items are divided up into borrowing destinations
 -
 - Items are placed in bags to correct destination - bags can included borrowed items that belong to the destination library
 - Bags are then taken to courier pick up location
 - Courier picks up items
 - When getting items from the bags, returned items will also be in the bags. Separate owned items from borrowed items.
 - Owned Items
 - Scan in items - Alma -> Fulfillment -> Return Items
 - Reshelve items

Borrowing Workflow:

- Pick up items from Courier location
- Separate items that you own that are being returned and items that are going to your patrons (for your items returning see above)
- For the items that your patrons are borrowing
 - Log into Alma
 - Under Resource Sharing, select Receiving items
 - Scan the barcode of each item for your patrons
 - Optional - Print out a flag. Chris is designing.

- (For libraries who are using the resource sharing library as a separate library, take to Circ Desk and scan. - check to see if the patron received an email saying that their item(s) are available for pick up - during testing)
- Patron appears at circ desk and asks for item
 - The item is checked out to the patron for the correct loan period
- Patron has the item out for the allowable time
 - Patron returns item
- Circulation staff returns the item in Alma
- A pop up box appears that says this item's destination is elsewhere
 - Item is placed in the area where items are placed into bags and sent to the proper library who owns the item