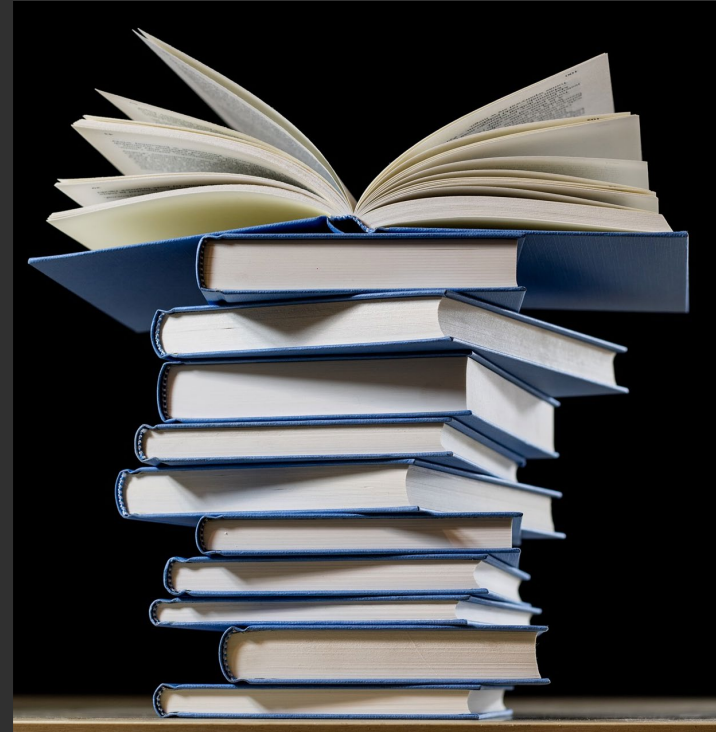# Mail to Services at HSU Library

Meghann Weldon
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THANK YOU
for the time, patience, testing and investigating!

Bri and Janee

Moshe from ExL

And testing partners (lenders)

Natalya from San Marcos

Requests for CSU+

Lender's view:
they don't see patron's information and their workflow isn't impacted

Books Go via Courier

Books travel to the patron's home campus

Staff unpack the red book filled bags

And take to Alma...

Receive the item in Alma

Received Items

Identifier type ● Barcode ○ External identifier

Automatically notify patron ☑

Note to partner

Barcode [|]

Received format ● Physical ○ Digital ○ Physical non-returnable

Internal note

Receive Items

Yes!

Title La canción del coquí y otros cuentos de Puerto Rico /

External identifier 01CALSHUL0009819

Item policy CalState RS Long Loan

Fulfillment note

Due date 09/30/2020

Fund

Patron Receive Cost 0.00 USD

For Reading Room Use Only ☐

Multiple items ☐

Temporary barcode * 30680001889628

Automatically print slip ● Yes ○ No

Location Resource Sharing Long Loan

Internal note

Shipping cost 0.00 USD

Patron Request Cost 0.00 USD

No records were found.

Cancel Save

Receiving

Scan in barcode

Toggle Yes to Automatically print slip

Item Received
Destination indicates home delivery or hold shelf

Home address shows up if a personal delivery option was selected (even if they chose alternate address)

Items going to the hold shelf will have the as destination hold shelf as usual

Receiving: results in item checked out and letter being sent

Personal Delivery Notification ▶ Inbox ×

Your.Department@organization.com via humboldt.edu   Thu, Jul 9, 10:18 AM (6 days ago)
to me ▾

Personal Delivery Notification

Dear Meghann Weldon,

We have sent the material to you 07/09/2020 .

Please note that :

Map of the seven veils /
By: Tolhurst, Gray Andrew

Item will be delivered to the address you submitted with the request :

Due Date : 09/08/2020 11:45:00 PM PDT

Sincerely
Circulation Department

Humboldt State University

Renew a Book / My Account

1.requester selects a home delivery option

2. lender ships

3.borrower receives->item checks out automatically to patron & patron receives personal delivery notification

Use of RS Receiving Slip Letter

+ If Patron entered address: it shows up as delivery address and we can cut out from this letter for a shipping label
+ If patron selected library pickup location library it will be indicated on the letter
- If patron selected "home" option it will say home option and staff will have to look up patron mailing info in Alma.
    - Moshe knows that this isn't great and hopefully this will be improved upon in an upcoming release but it is what it is for now...

Delivery address

Configuring Mail to Services for CSU+

-TOU of the RESOURCE SHARING LIBRARY need to support personal delivery

-circulation desk at RS library needs to support personal delivery

-TOU of fulfillment unit need to support personal delivery

-patron records are required to have an address- done from Peoplesoft

-configure the forms to have mail to option and alternate address option (code table and labels)

-edit the "personal delivery letter"

-edit the "rs receive slip letter"

TOU at the RS Library: support personal delivery

Personal delivery needs to be set in whichever fulfillment unit is associated with requesting for physical resource sharing.

We added personal delivery to the TOU that applies to our user groups that do requesting and it seemed to remove a roadblock and make requests possible when we'd previously just had the personal delivery on at the TOU for the CAL STATE borrowing

CALSTATE RS Borrowing Rule is a network rule: need to configure at your institution as well as at RS Library

TOUs associated with Fulfillment Units

TOU Configuration

Circulation Desk

Configuring: resource sharing library/fulfillment/library management circulation desks (RES_DESK)

Note: if the circulation desk doesn't allow personal delivery Alma will reroute item to a desk that does (requiring staff to transfer the item)

Configuring CSU+ Request Form

To edit fields that show up on the form: Configuring: Institution/fulfillment/discovery interface display logic/ resource sharing form customization, then selected the fields

5	☐	▲	▼	Deliver to library	☐	☑
6	☐	▲	▼	Ship to Me	☐	☑
7	☐	▲	▼	Pickup/delivery location:	☐	☑
8	☐	▲	▼	Enter Address	☐	☑

To edit what those fields display as:

Configuring:
Institution/fulfillment/discovery interface display logic/ labels

Relevant labels to edit 95-104

95	c.uresolver.request.ill.deliveryLocation	Delivery Options:
96	c.uresolver.request.ill.delivery.library	Deliver to library
97	c.uresolver.request.ill.delivery.alternative	Ship to Me
98	c.uresolver.request.ill.delivery.alternate	Enter Address
99	c.uresolver.request.ill.delivery.alternative.email	Email Address
100	c.uresolver.request.ill.delivery.alternative.postal.line1	Street
101	c.uresolver.request.ill.delivery.alternative.postal.line2	City and State
102	c.uresolver.request.ill.delivery.alternative.postal.line3	Postal Code
103	c.uresolver.request.ill.delivery.alternative.postal.line4	Line 4:

RS Receive Slip Letter (letter 106)

this letter can be used as a printout at your library to as a shipping label if you edit the template to have it pull in the entry from the patron:

```
<b> Direct Delivery:</b>

<br/>

<xsl:value-of select="notification_data/request/line1"/>

<br/>

<xsl:value-of select="notification_data/request/line2"/>

<br/>

<xsl:value-of select="notification_data/request/line3"/>

<br/>

<xsl:value-of select="notification_data/request/line4"/>

</td>

</tr>

</xsl:if>
```

Resource Sharing Receive Slip Letter   07/10/2020

Direct Delivery:

123 testing street
Fantastic, CA
1234

Other Letters to Consider

We hadn't used the personal delivery letter before so we wanted to check that it's messaging matched our intention

Note: line 2 will tell the patron the item is being delivered to (enters Alma address) I changed it to: Item will be delivered to the address you submitted with the request
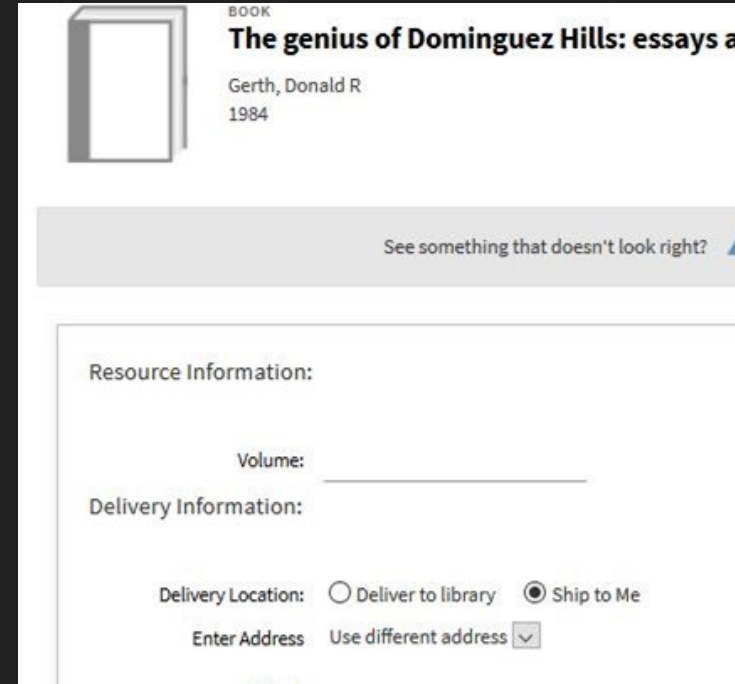

The hold shelf letter should be reviewed to make sure it reflects current information/circumstances for your users

What we learned: Don't make this mistake

On the request form both pick up and delivery to locations are required though they may seem a bit redundant and you may think of trying to get rid of one of them...

Pick up/delivery location: triggers the mail to workflow. Without this users that select ship to me and type in an address still route as library pick up so they get the hold letter and staff don't see that they chose the mail option.

Ship to me: allows the alternate address to be an option for users

What we learned: this is really annoying

Your browser may remember your old form when testing to see the new form you may have to clear cache or use a different browser than usual

Request form won't show up unless you find an item with an available lender

hint: SF didn't turn off their lending so search an item they own to see what your form looks like

There are TOU for institution, library and resource sharing library- pay attention where you have/haven't enable personal delivery

ExL documentation on Personal Delivery:

Personal delivery option is supported by Alma you can use this video for future reference: https://www.youtube.com/watch?v=9JZiI1AD3UM&hd=1.

This video assumes the use of the patron's address in Alma, we know that doesn't represent where they are thus implement: alternative address

ExL on Personal Delivery for local holds:

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/050Physical_Fulfillment

Requests for Locally Held Items

Access Services created Google forms for collecting addresses for IDs at the place of where folks upload their photos and a Google form for students needing Chromebooks shipped to them. The hold request form in Onesearch has a place to collect the patron address for other HSU library items.

Local Holds and Mailing

Repurposed comment field to collect the address (configure via Labels)

Comments field prints on our pulls slips so staff can use as a shipping label and sort by destination. Pull slips= (letter 53: Ful Resource Request Slip Letter)

Personal delivery can be configured for local holds:

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/050Physical_Fulfillment