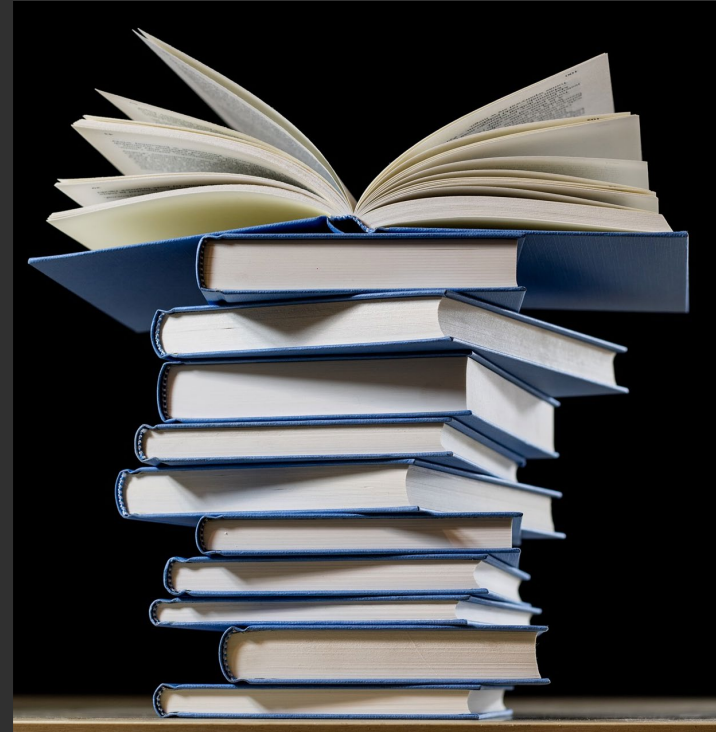


# Mail to Services at HSU Library

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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

Lee from San Francisco

# Requests for CSU+

 BOOK  
**The genius of Dominguez Hills: essays and addresses** 

Gerth, Donald R  
1984

See something that doesn't look right?  [REPORT A PROBLEM](#)

Resource Information:

Volume: \_\_\_\_\_

Delivery Information:

Delivery Location:  Deliver to library  Ship to Me

Enter Address Use different address

<https://drive.google.com/file/d/1c6hT7-snWw7VwmAvXtYwrP7JwlOxczj/view>

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

The screenshot shows a library system interface with a 'Print Slip Report' dialog box. The dialog box has the following fields and options:

- Choose Type:**  Printer  User
- Format Type:**  XML  Excel
- Printer:** California State University San B.
- User:** (empty field)
- Buttons:** Download, Cancel, Send

The background shows a resource record for 'La canción del coquí y otros cuentos de Puerto Rico / Nicholasa Mohr y Antonio Martorell'. The record includes the following details:

- Title:** La canción del coquí y otros cuentos de Puerto Rico / Nicholasa Mohr y Antonio Martorell.
- Book (Book - Physical) text:** unmediated; volume By Mohr, Nicholasa. (New York, N.Y. : Viking, 1999.)
- ISBN:** 0670862967 and others
- DCLC Number:** 31938371
- LCCN:** 95063178
- Subject:** Tales--Puerto Rico. -- Folklore--Puerto Rico. -- Materiales en español. and others.
- MMS ID:** 9921834201672
- External identifier:** 1/01CALSHUL0009819
- Barcode:** 30680001889628
- Request Status:** Shipped Physically
- Resource Locate Status:** Resource Located
- Requested Media:** Any
- Partner:** Humboldt
- Due Date:** 10/01/2020
- Request Printed:** No
- Request Reported:** No
- Requested Format:** Physical
- Creation Date:** 07/13/2020
- Update Date:** 07/13/2020

At the bottom, there are tabs for Alerts, Physical (Z), Electronic, Digital, and Other details.

The screenshot shows a library label for the book 'La canción del coquí y otros cuentos de Puerto Rico'. The label includes the following information:

- Title:** La canción del coquí y otros cuentos de Puerto Rico
- Volume:** (empty)
- Location:** [5th Floor - Barahona Center Spanish - 398.2097295 M699]
- Barcode:** 1//01CALSHUL0009819
- Due Date:** (empty)
- No Renewals**
- Replacement Charge = \$90.00**
- Provided by:** (CS1)
- CSUSM UNIVERSITY LIBRARY**
- Do Not Remove Book Strap**
- Item Condition Report**

The Item Condition Report section includes the following fields:

- Binding Issues
- Writing/Highlighting
- Cover/Spine Issues
- Liquid Damage/Stained
- Other (describe below)
- Missing CD/DVD

# 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

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

External identifier 01CALSHUL0009819

Item policy CalState RS Long Loan

Automatically print slip  Yes  No

Location Resource Sharing Long Loan

Internal note

Shipping cost 0.00 USD

Patron Receive Cost 0.00 USD

Patron Request Cost 0.00 USD

For Reading Room Use Only

Multiple items

Temporary barcode\* 30460001889628

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

Borrowing requests Requester

### Received Items

Identifier type  Barcode  External identifier

Automatically notify patron

Note to partner

Barcode

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

Activated	Title	Destination	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In
1. <input type="checkbox"/>	El gato con cartas /	Weldon, Meghann : Home Address	Patron physical item request	Weldon, Meghann	011330732	0	<input type="button" value="..."/>

# Receiving: results in item checked out and letter being sent

Personal Delivery Notification ▶ Inbox x

Your.Department@organization.com via [humboldt.edu](#)  
to me ▼

Thu, Jul 9, 10:18 AM (6 days ago)



## 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 : 09/09/2020 11:45:00 PM PDT

Sincerely  
Circulation Department

- 1.requester selects a home delivery option
2. lender ships
- 3.borrower receives->item checks out automatically to patron & patron receives personal delivery notification

Humboldt State University

[Renew a Book / My Account](#)



# 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...



# 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

← Edit Fulfillment Unit Cancel Save

Code General

Fulfillment Unit Details Fulfillment Unit Locations Fulfillment Unit Rules

Rule Type

Institution Rules List + Add Rule ↔ ⚙️

Filter: All

	Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update Date	
1	<input checked="" type="checkbox"/>		▼	Library Use Only	-	Library Use Only	Staff, Ex Libris	06/08/2016	⋮
2	<input checked="" type="checkbox"/>	▲	▼	No Recalls	No recalls - Items on Loan	No Recalls	Folden, Bill	02/06/2018	⋮
3	<input checked="" type="checkbox"/>	▲	▼	New Books	New Books - no resource sharing	7 Day Media All Borrowers	Mason, Janee	02/22/2018	⋮
4	<input checked="" type="checkbox"/>	▲	▼	Popular Reading	Popular Reading - no resource sharing	7 Day Media All Borrowers	Mason, Janee	02/22/2018	⋮

# TOU Configuration

Terms of Use Management 1 2 Cancel Next

Policy Type	Policy Name	
1 Is Requestable	Requestable (Requestable)	...
2 Pickup Locations	Anywhere (Default value for Pickup - Anywhere)	...
3 Hold Shelf Period	7 day Hold Shelf (Default value for HoldShelfPerio	...
4 Is Digitizeable	Is Digitizable (Default value for digitizable)	...
5 Is Requestable for Physical Resource Sharing	Requestable for physical resource sharing (Reque:	...
6 Is Requestable for Digital Resource Sharing	Requestable for digital resource sharing (Request:	...
7 Request Priority	High (High)	...
8 On Shelf Request Policy	Use fulfillment unit definition (Use fulfillment unit	...
9 Personal delivery	Personal Delivery - Home (Deliver items only to a l	...
10 Personal delivery fee	No Personal delivery fee (No Personal delivery fee	...

# 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)

The screenshot shows the configuration interface for a 'Resource Sharing Desk' in the Alma system. At the top, it indicates 'You are configuring: Resource Sharing Library'. Below this, the desk's details are shown: Code 'RES\_DESK' and Description 'The Resource Sharing Desk manages all items of the Resource Sharing Library'. A navigation bar includes tabs for 'General Details', 'Physical Locations', 'Work Order Types', 'Operators', and 'Automatic Printing'. The 'General Details' tab is active, displaying a form with the following fields: 'Name' (Resource Sharing Desk), 'Primary' (checked), 'Reading room desk' (unchecked), 'Picks from shelf' (checked), 'Supports personal delivery' (checked and highlighted in yellow), 'Time to reshelve (hours)' (empty), and 'Delay for hold notification (minutes)' (empty).

Resource Sharing Desk	
Code	RES_DESK
Description	The Resource Sharing Desk manages all items of the Resource Sharing Library

General Details | Physical Locations | Work Order Types | Operators | Automatic Printing

General Details

Name \*

Primary

Reading room desk

Picks from shelf

Supports personal delivery

Time to reshelve (hours)

Delay for hold notification (minutes)

# 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	<input type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	Deliver to library	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	<input type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	Ship to Me	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	<input type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	Pickup/delivery location:	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	<input type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="▼"/>	Enter Address	<input type="checkbox"/>	<input checked="" type="checkbox"/>

To edit what those fields display as:

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

Relevant labels to edit 95-104

95	<input type="text" value="c.uresolver.request.ill.deliveryLocation"/>	Delivery Options:
96	<input type="text" value="c.uresolver.request.ill.delivery.library"/>	Deliver to library
97	<input type="text" value="c.uresolver.request.ill.delivery.alternative"/>	Ship to Me
98	<input type="text" value="c.uresolver.request.ill.delivery.alternate"/>	Enter Address
99	<input type="text" value="c.uresolver.request.ill.delivery.alternative.email"/>	Email Address
100	<input type="text" value="c.uresolver.request.ill.delivery.alternative.postal.line1"/>	Street
101	<input type="text" value="c.uresolver.request.ill.delivery.alternative.postal.line2"/>	City and State
102	<input type="text" value="c.uresolver.request.ill.delivery.alternative.postal.line3"/>	Postal Code
103	<input type="text" value="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

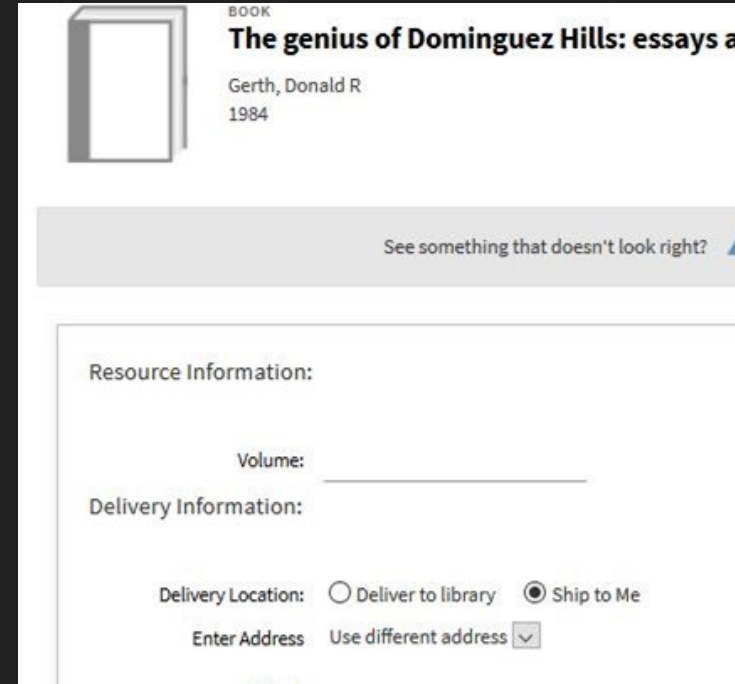
The hold shelf letter should be reviewed to make sure it reflects current information/circumstances for your users

# 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



BOOK

**The genius of Dominguez Hills: essays a**

Gerth, Donald R.  
1984

See something that doesn't look right?

Resource Information:

Volume: \_\_\_\_\_

Delivery Information:

Delivery Location:  Deliver to library  Ship to Me

Enter Address Use different address

# 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

I

# 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=9JZi1AD3UM&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](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.

Questions Responses 16



## Photo ID Request form: Humboldt State University

Current Students, Faculty and Staff can sign up to receive your ID in the mail (\*\*expect the card in 2-5 business days\*\*). For more information and updates, please leave a detailed message at the Library front desk (707-826-3431) email us at [libcirculation@humboldt.edu](mailto:libcirculation@humboldt.edu) or visit <https://libguides.humboldt.edu/continuity/students>.

This form is automatically collecting email addresses for Humboldt State University users. [Change settings](#)


## HSU Fall 2020 Chromebook Request

Please use this form to request a Library/ITS Chromebook for checkout and mailed to your address. This service is limited to currently enrolled HSU students, equipment will be mailed with a return mailer. Items must be returned by January 8, 2021. If you have any questions, please email [libcirculation@Humboldt.edu](mailto:libcirculation@Humboldt.edu) and any technical questions, please email [Help@Humboldt.edu](mailto:Help@Humboldt.edu)

Your email address ([mab1044@humboldt.edu](mailto:mab1044@humboldt.edu)) will be recorded when you submit this form. Not you? [Switch account](#)

Name

# Local Holds and Mailing



Details of title you requested:

Pickup Location: \*

Enter Shipping Address:

CANCEL REQUEST

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