

RSFC and FFC Open Forum: Part 1

July 23rd, 2020



Agenda

- Restarting CSU+ Checklist
- Changing the CSU+ Loan Period to 16 Weeks
- Home Delivery for CSU+ and Local Items
- Configuring Request Limits
- Clearing Old Items from the Holdshelf
- Safety Measures Discussion
- Q&A

Returning to the Library

- All CSU libraries will be staffed in at least some capacity
- At least 9 CSU libraries will not have student assistant support in the fall
- 12 CSUs reported they will be resuming CSU+ in August

https://docs.google.com/spreadsheets/d/1JqCpKn4k3D_KgBm5FeTk17mZh_85hMdFYltdDFxol8Q/edit?usp=sharing

Restarting CSU+ Checklist

<https://calstate.atlassian.net/wiki/spaces/URS/pages/1250033695/Restarting+CSU+Checklist>

ULMS wiki → RSFC → Functional Committee Documentation → Restarting CSU+ Checklist

General Logistics Before Restarting

- An appropriate level of resource sharing staff in the library building will be needed.
 - You will need to be able to page/send out CSU+ items AT LEAST ONCE PER WEEK.
 - RS volume is unknown, but if volume is an issue, request limiting is possible.

General Logistics Before Restarting

- A place to quarantine incoming Unity packages will be needed.
 - Ideally, this will be where Unity will delivery the packages
 - Ideally, the packages will remain there untouched until after quarantine
 - If handling delivered packages is required before quarantine expiration, use PPE

General Logistics Before Restarting

- Have extra packaging material on hand
 - Quarantining courier pouches will severely reduce the number of available pouches
 - The same goes for the Unity flip cards--so make a stash of photocopies or scans
 - Boxes and padded mailers will work in place of courier bags if you run out--just tape a photocopy or print out of a flip card to the box or padded mailer

Turn On RS Borrowing and Lending

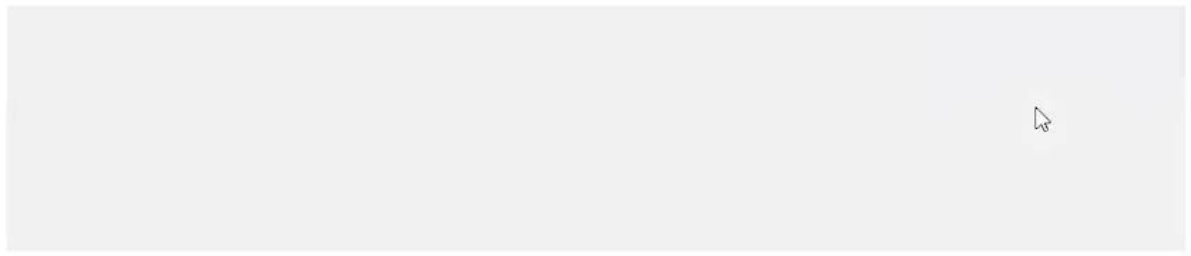
- Role Required:
 - General Administrator
- Settings Path
 - Library doing RS→ Fulfilment→Library Management→ Library Details

Search everything

Everything

ADVANCED SEARCH

BACK TO RESULTS LIST



Unhide Using Display Logic (if necessary)

- Role Required:
 - General Administrator
 - Fulfillment Administrator
- Settings Path
 - Institution → Fulfilment → Discovery Interface Display Logic- → Display Logic Rules

Configuring
San Francisco State Univ

Filter List
Look-up or select

- Acquisitions
- Resources
- Fulfillment
- User Management
- General
- Analytics

- Library Management**
 - Opening Hours
 - Transit Time
 - Reshelve Without Transit Rules
 - SIP2 Bin Configuration
- Locations**
 - Remote Storage
- Physical Fulfillment**
 - Fulfillment Units
 - Terms of Use and Policies
 - Block Preferences
 - Auto Loan Renewal Rules

- Digital Fulfillment**
 - Digitization Departments
 - Electronic Document Delivery Rules
 - Delivery Profiles Metadata
 - Alma Viewer Labels
 - Viewer Share Buttons
- Courses**
 - Processing Departments
 - Academic Departments
 - Additional Reading List Citation
 - Statuses
 - Citation Processing Rules
 - Course Terms

- Resource Sharing**
 - Workflow Profiles
 - Rota Assignment Rules
 - Locate Profiles
 - Shipping Cost Lender Rules
 - Shipping Cost Borrower Rules
 - Sending Borrowing Request Rules
 - Patron Query Templates
 - Additional Requested Media
 - Requested Media Definition
 - Levels of Service
 - Library Mapping
 - Brief Audit Fields

- Discovery Interface Display Logic**
 - Display Logic Rules
 - Labels
 - Related Records
 - Direct Linking
 - General Electronic Services
 - Viewer Services
 - Online Services Order
 - General Electronic Services Order
 - Locations Ordering Profile
 - Other Settings
 - Primo View to Libraries
 - Hold Request Form Customization

Updating and Managing Service Expectations

- Role Required:
 - General System Administrator
 - Fulfillment Administrator
 - Library webmaster (or similar)
- Things to do
 - Change CSU+ request label (Discovery Interface Display Logic→ Labels)
 - Change website and other public facing info

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San Francisco State Uni

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Discovery Interface Display Logic

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Changing the CSU+ Loan Period to 16 Weeks

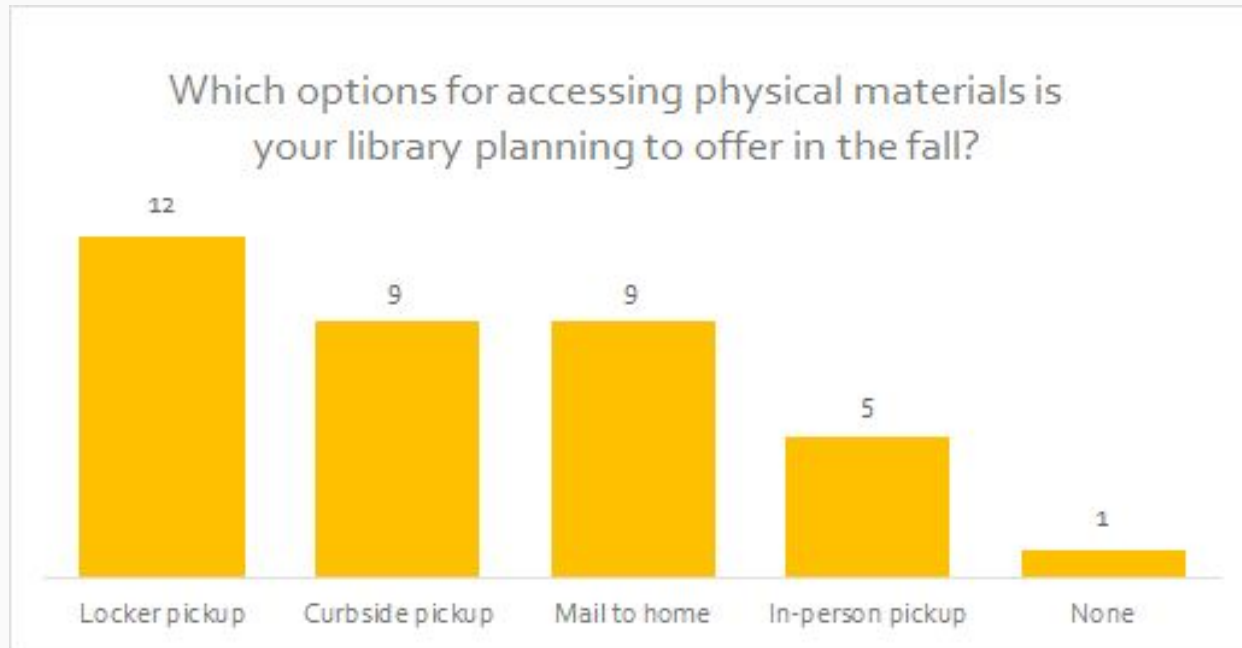
Role Required: Fulfillment Administrator

Tasks:

1. Change the due date policy in the TOU for CSU+ borrowing requests (for due date assigned at checkout)
2. Change the due date policy in the TOU for CSU+ lending requests (for due date assigned when item is shipped)

<https://calstate.atlassian.net/wiki/spaces/URS/pages/1234337800/Changing+the+CSU+Loan+Period+to+16+Weeks>

Delivery of Physical Materials



Home Delivery for CSU+ and Local Holds

Configuring Local Request Limits

Role Required: Fulfillment Administrator or General Administrator

Configuration path:

Configuration menu -> Fulfillment -> Patron Configurations -> Patron Limits

Task:

- Enter the maximum number of allowed requests in the “Max. physical item requests” field for each user group.

Patron Limits Wiki: <https://calstate.atlassian.net/wiki/spaces/ULMSA/pages/1267597346/Patron+Limits>

*CSU+ requests limits will be demoed at the July 30 Open Forum.

Clearing Old Items from the Hold Shelf

Role Required: Requests Operator (except as listed below)

Tasks:

1. Deactivate or edit the **Ful Cancel Request Letter**.
Role: Letter Administrator or General Administrator
2. Create a list of requests to cancel.
3. Create a physical items set from list.
4. Run the **Cancel Item Requests** job.
5. Scan in items pulled from hold shelf.

Cancel Requests Wiki:

<https://calstate.atlassian.net/wiki/spaces/ULMSA/pages/1272479759/Cancel+Physical+Item+Requests+in+Bulk>

Safety Measures



Safety Measures



Q&A