Book Request Home Delivery

Patron-initiated requesting of library items for home delivery

Presented by Christian Ward - California State University, Sacramento
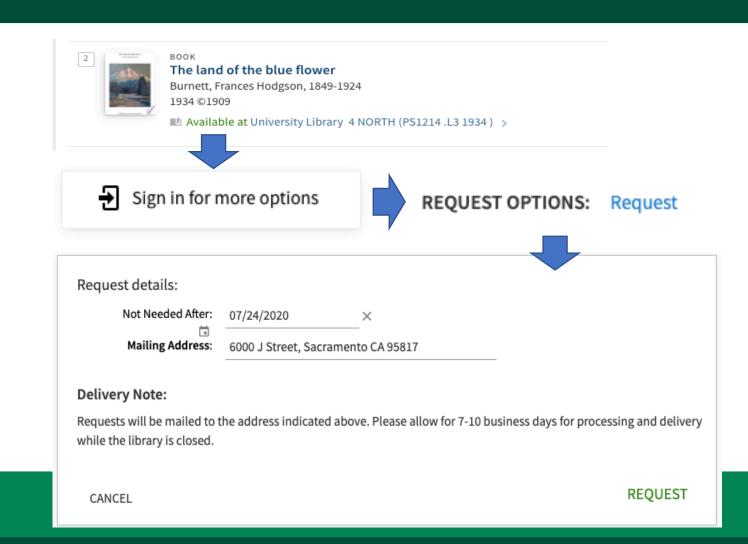
Overview

- Primo Requesting Workflow

- Alma Processing Workflow

- Staff Initiated Recalls

- Alma Setup

- Q&A

Primo Requesting Workflow

- Patron finds an available item using OneSearch

- Sign-in for request options

- Click Request and complete form:
  - Specify Mailing Address
  - Display text indicating delivery expectations
  - Submit request

2 | BOOK
The land of the blue flower
Burnett, Frances Hodgson, 1849-1924
1934 ©1909
📖 Available at University Library 4 NORTH (PS1214 .L3 1934) >

⬇

→] Sign in for more options

➡ REQUEST OPTIONS: Request

⬇

Request details:

Not Needed After: 07/24/2020 ✕
📅
Mailing Address: 6000 J Street, Sacramento CA 95817

Delivery Note:

Requests will be mailed to the address indicated above. Please allow for 7-10 business days for processing and delivery while the library is closed.

CANCEL   REQUEST

Alma Processing Workflow

- Monitor pick from shelf list and download the print slip report

Print Slip Report

3 ☐
The land of the blue flower / by Frances Hodgson Burnett.
Author: Burnett, Frances Hodgson, 1849-1924.
Imprint: New York : Dodd, Mead, 1934, ©1909.
Request Notes: 6000 J Street, Sacramento CA 95817

Location: 4 NORTH
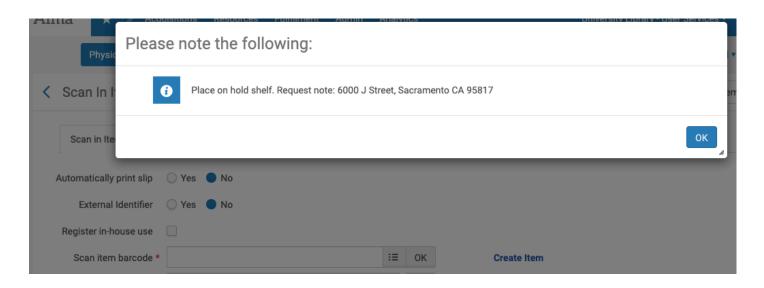**Call Number:** PS1214 .L3 1934
Requests: 1

	A	B	C	D	E	F
1	Title	Location	Call Number	Requested For	Pickup Location	Request Note
2	The land of the blue flower / by Frances Hodgson Burr	4 NORTH (4n)	PS1214 .L3 1934	Ward, Christian	University Library	6000 J Street, Sacramento CA 95819
3						

- Report contains the item, requester, and address information from the request.

Alma Processing Workflow

- Pull item and scan at hold shelf

- Patron automatically receives request processing notice

- Checkout the item to the patron

- Use slip report to create merged mailing labels & mail item

Please note the following:

Place on hold shelf. Request note: 6000 J Street, Sacramento CA 95817

OK

Automatically print slip ○ Yes ● No

External Identifier ○ Yes ● No

Register in-house use ☐

Scan item barcode * [   ] ☰ OK   Create Item

The item you requested has been checked out to you and will be delivered to your home address. Please allow for 7-10 business days for delivery while the library is closed.

The land of the blue flower /
By: Burnett, Frances Hodgson,

For questions, please call User Services at (916) 278-6708.
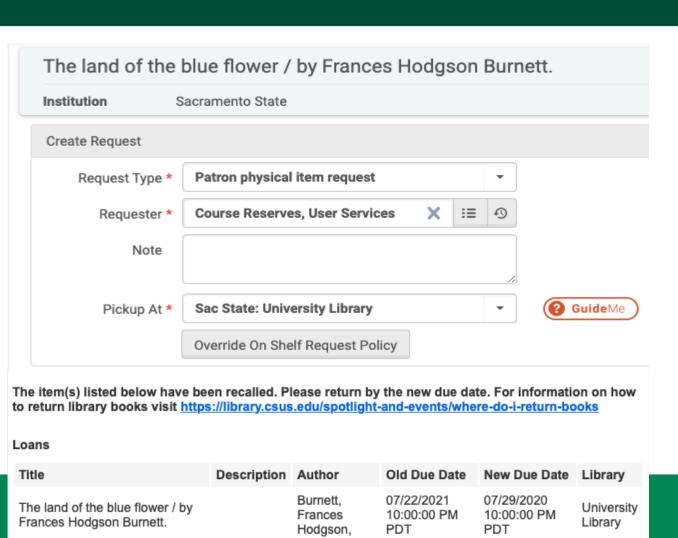
Staff Initiated Recalls

- Staff can recall items on loan to be placed on course reserves:
  - Add the Library Staff patron group to any internal account
  - Initiate request on loaned item and specify internal account.
  - Patron receives a notice of due date change and instructions on how to return item

The land of the blue flower / by Frances Hodgson Burnett.

| Institution | Sacramento State |

Create Request

Request Type *	Patron physical item request	▼
Requester *	Course Reserves, User Services	✕ ☰ 🕑
Note	
Pickup At *	Sac State: University Library	▼

Override On Shelf Request Policy

The item(s) listed below have been recalled. Please return by the new due date. For information on how to return library books visit https://library.csus.edu/spotlight-and-events/where-do-i-return-books

Loans

Title	Description	Author	Old Due Date	New Due Date	Library
The land of the blue flower / by Frances Hodgson Burnett.		Burnett, Frances Hodgson,	07/22/2021 10:00:00 PM PDT	07/29/2020 10:00:00 PM PDT	University Library

NOTICE: Please be aware that all items are subject to recall.

Alma Setup

- User Groups & Limits
  - Specify patron group max physical items request limits
  - Add new patron group(Library Staff) to allow staff-initiated recalls

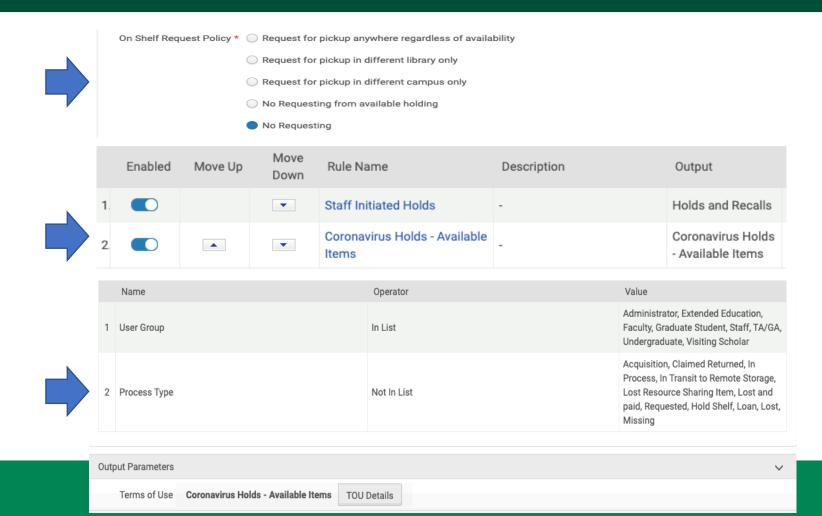|	User group	Max. cash	Max. overdues	Max. bookings	Max. overdue recalls	Max. digitization requests	Max. physical item requests
8	UC Davis	9.99	15				
9	Alumni	9.99	15				
10	Administ	9.99	100				4
11	Faculty	9.99	100				4
12	Staff	9.99	100				4
13	Retiree	9.99	100				
14	TA/GA	9.99	100				4
15	Graduate	9.99	75				4

Alma Setup

- Terms of Use
  - Define Coronavirus Holds request TOU
    - Is Requestable = Requestable
    - Pickup Locations = Pickup only in owning library
    - On Shelf Request Policy = Allow for pickup anywhere regardless of availability
    - Personal delivery = None
  - Define Staff-Initiated Hold and Recalls TOU
    - Same settings as Coronavirus Holds request TOU

	Policy Type	Policy Name	Policy Description
1	Is Requestable	Requestable	Requestable
2	Pickup Locations	Pickup only in owning library	Must pickup in owning library
3	Hold Shelf Period	10 day Hold Shelf	-
4	Is Digitizeable	Not Digitizable	Not Digitizable
5	Is Requestable for Physical Resource Sharing	Not Requestable For Resourse Sharing	-
6	Is Requestable for Digital Resource Sharing	Not requestable for digital resource sharing	Not requestable for digital resource sharing
7	Request Priority	Medium	Medium
8	On Shelf Request Policy	Allow for pickup anywhere regardless of availability	Allow for pickup anywhere regardless of availability
9	Personal delivery	Personal Delivery - None	Do not deliver items at all
1...	Personal delivery fee	Personal Delivery Fee - No Fee	Personal delivery is not charged with a fee
1...	Automatically convert to resource sharing	Do not convert to resource sharing	Do not convert to resource sharing
1...	Digitization Fee per Digitization	No Fee	Digitization request is not charged with a fee
1...	Digitization Fee per Page	No Fee	Digitization request is not charged with a fee per page

Alma Setup

- Fulfillment Unit
  - On Shelf Request Policy = No Requesting
  - Prevents patron-initiated recalls
- Fulfillment Unit Request Rules
  - Staff-initiated holds
    - User Group = Library Staff
    - Process Type = Loan
  - Coronavirus Holds
    - User Group = Faculty, Staff, Undergraduates, Graduates, etc.
    - Process Type != Loan

On Shelf Request Policy *
- ○ Request for pickup anywhere regardless of availability
- ○ Request for pickup in different library only
- ○ Request for pickup in different campus only
- ○ No Requesting from available holding
- ● No Requesting

	Enabled	Move Up	Move Down	Rule Name	Description	Output
1.	⬤		▼	Staff Initiated Holds	-	Holds and Recalls
2.	⬤	▲	▼	Coronavirus Holds - Available Items	-	Coronavirus Holds - Available Items

	Name	Operator	Value
1	User Group	In List	Administrator, Extended Education, Faculty, Graduate Student, Staff, TA/GA, Undergraduate, Visiting Scholar
2	Process Type	Not In List	Acquisition, Claimed Returned, In Process, In Transit to Remote Storage, Lost Resource Sharing Item, Lost and paid, Requested, Hold Shelf, Loan, Lost, Missing

Output Parameters ⌄

Terms of Use   **Coronavirus Holds - Available Items**   TOU Details

- Hold Request Form & Labels
  - Change the field labels (Fulfillment->Discovery Interface Display Logic->Labels)
    - comment
      - Mailing Address:
    - generalUseLabel:
      -
<h3>Delivery Note:</h3><p>Requests will be mailed to the address indicated above. Please allow for 7-10 business days for processing and delivery while the library is closed.</p>
    - (optional) submitSuccessfully:
      - <p>Request Submitted.</p><p>For the mailing of all book request deliveries, please allow for 7-10 business days while the library is closed.</p>
  - Enable: **comment** and **generalUseLabel** fields to display to the public
    - Alma Configuration->Fulfillment->Discovery Interface Display Logic->Hold Request Form Configuration

4	comment	Yes	▼	Hold, General Hold, Another Is
5	endPage (For future use)	No	▼	General Hold, Another Issue
6	generalUseLabel	Yes	▼	Hold, General Hold, Another Is

Alma Setup

- Alma Letters
  - Comment out any library location pickup references on the templates:
    - On Hold Shelf Letter
    - Loan Status Notice
    - Ful Cancel Request Letter

Notification of Availability   07/22/2020

University Library
California State University, Sacramento
University Library
Sacramento
95819-6039
USA

Ward, Christian

The item you requested has been checked out to you and will be delivered to your home address. Please allow for 7-10 business days for delivery while the library is closed.

The land of the blue flower /
By: Burnett, Frances Hodgson,

For questions, please call User Services at (916) 278-6708.

Thank you.

University Library

This email is an automated notification, which is unable to receive replies. We're happy to assist you with any questions or concerns you may have. For general library inquiries, questions regarding your library account, or lost items, please contact us directly via email at lib-circ@csus.edu For questions regarding Interlibrary Loan requests (CSU+ or ILLiad) please contact us directly via email at lib-ill@csus.edu We can also be reached by phone at 916-278-6708 regarding any questions you may have.

SACRAMENTO STATE
UNIVERSITY
LIBRARY

- Hide Delivery Method field from primo:
  - Either create a new delivery skin and download the Skin Zip File or edit and download existing delivery skin
    - Alma Configuration->General->User Interface Settings->Delivery System Skins
  - Add the following lines of code to hide the location field and label from the request form:

```
.holdRequest #pickupLocationH {
    display: none;
}

.holdRequest #pickupLocationV {
    display: none;
}
```


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CANCEL   REQUEST

Q&A

Questions/Comments?

☺ Thanks for Watching ☺

Presenter

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California State University, Sacramento

Special thanks to Astra Gleason, Rachael Joy-Davis, Alberto Pulido, and Lesley Brown
for testing and developing the book request home delivery workflow