COVID 19 Preparation Follow-Up

SUNY

March 19, 2020

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Resource Sharing and Requesting

Emergency Closing Procedures FAQ & COVID-19 LibGuide

- FAQ: https://slcny.libanswers.com/faq/286209
  - Added FAQ for turning off ILLiad/OCLC lending
  - Added videos for turning off Alma RS, turning off on shelf requesting, and turning off General Electronic Services

- LibGuide: https://slcny.libguides.com/libraries-COVID19
  - Alma/Primo configuration, national level resources, SUNY surveys & results, works from home projects, vendor resources

Alma Resource Sharing

- Alma Resource Sharing has been turned off for all SUNY institutions as of March 18, 2020
- No date for turning resource sharing back on has been set at this time
- SLSS staff have turned off borrowing and lending at all SUNY libraries
- Please reject lending requests in the Being Processed status, and scan in items that are in the Shipped Physically status but haven't actually been shipped yet (this will complete the request on both ends)
- Turn off Export to Third Party function if you don't want unfilled requests being exported to ILLiad
- I will be creating an FAQ on cleaning up request lists soon

Resource Sharing and Fulfillment Configuration Changes

- Temporary SLC Policy (until July 31, 2020):
  - https://slcny.libguides.com/ld.php?content_id=52873224
  - All RS borrowing and lending loan periods now 16 weeks with 3 renewals
  - Automatic Renewals allowed for RS requests
  - Open SUNY users (i.e. Walk-in borrowers) can now submit resource sharing requests
- SLSS staff have taken care of configuration changes needed to implement these new policies (and will undo changes once policy expires)
- Some additional work will be needed to give Open SUNY users RS requesting privileges in Primo

Resource Sharing and Fulfillment Configuration Changes - Borrowing Loan Periods

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Resource Sharing and Fulfillment
Configuration Changes - Borrowing Loan Periods

Resource Sharing and Fulfillment
Configuration Changes - Lending Loan Periods

	Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update Date	
1	⬤		▾	Temporary Expanded RS Loan Period	Temporary Expanded RS Loan Period	Long Lending Loan - 112 days	SUNY, SLC	03/16/2020	...
2	⬤	▴	▾	Lending short loan due date	-	Lending Short Loan	PRITTIS	03/16/2020	...
3	⬤	▴		Lending Long Loan	-	Lending Long Loan	PRITTIS	03/16/2020	...

Code INSMN_FU

Fulfillment Unit Details   Fulfillment Unit Locations   Fulfillment Unit Rules

Rule Type   Lending Resourc

Institution Rules List

Add Rule

Filter : All

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Resource Sharing and Fulfillment Configuration Changes - Lending Loan Periods

Resource Sharing and Fulfillment Configuration Changes - Automatic Renewals

	Workflow Profile	Type	Steps
1	Borrowing	Borrowing Click to add text	Automatic renew,Cancelled By Patron,Cancelled by partner,Cancelled by staff,Conditional,Damaged communicated,Declared lost by partner,Lender check in,Lost communicated,Manual renew,Mediated Patron Renewal,Reject,Renew requested,Request accepted,Will Supply

- Requires configuring Automatic Loan Renewal Rules and turning on the Send Courtesy Notices and Handle Loan Renewals job.
- https://slcny.libanswers.com/faq/290287

Resource Sharing and Fulfillment Configuration Changes - Open SUNY RS Requesting

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Returns Procedures

- Users can now return any book borrowed from or through a SUNY library to any SUNY library
  - Applies to regular Alma loans, Alma resource sharing, and ILLiad/OCLC resource sharing
- Regular Alma loans and Alma resource sharing items should be sent back to the owning library
  - Scanning item back in will complete resource sharing requests on both ends
- ILLiad/OCLC items should be returned to the borrower's home library
- Tracking form for returns
  - https://slcny.libwizard.com/f/tracking

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Turning Lending Off in ILLiad/OCLC

- If you want to turn off all lending in ILLiad, you can change your OCLC Supplier status in the Policies Directory from Yes to No

- If you want to turn off just returnables lending, you can set up a Deflection Policy for Loan requests in the Policies Directory

- Policy Directory can be accessed through ILLiad's System tab

- Web Login: https://illpolicies.oclc.org/dill-ui/SignIn.do

Updating Due Dates in ILLiad

- No way to batch update borrowing or lending due dates in ILLiad client or Customization Manager
- IDS Logic can batch adjust loan periods
  - Add a set number of days to the current due date
  - Create a new due date based on current date
- IDS Logic only updates due dates in ILLiad (OCLC due date will not change)
- Email logic@idsproject.libanswers.com if you want your due dates adjusted
  - Be sure to include process type, queue name(s), and exactly how the due date should be adjusted
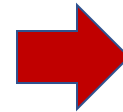
Primo Settings

Deactivate General Electronic Service for ILLiad

Primo Header

If you want to add a new link to your Primo header:

- Go to Discovery->Display Configuration->Configure Views
- Click the three dots to the right of your view to get Edit option
- Click on the Links Menu Tab
- Add link, use anything for Code
- Use up/down arrows to reorder
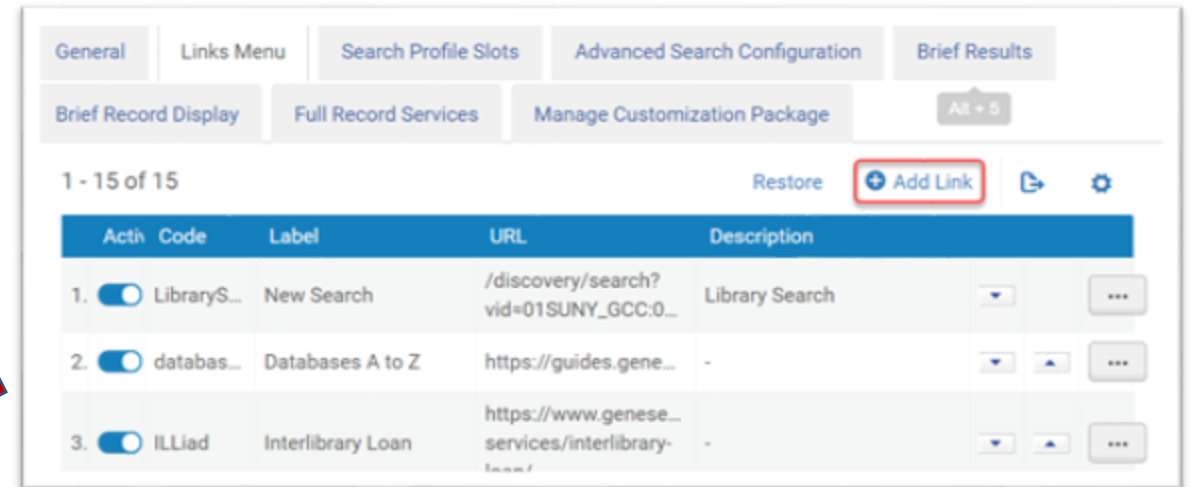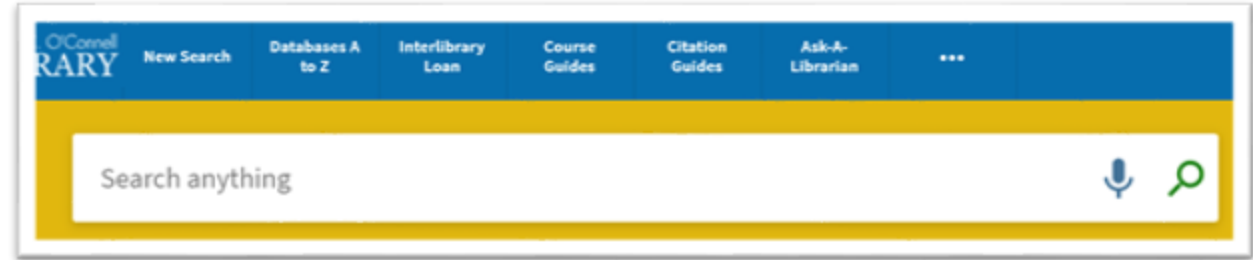
Primo Homepage - Banner

- Go to Discovery->Display Configuration->Configure Views
- Click on the Manage Customization Package tab
- Follow instructions in this FAQ: https://slcny.libanswers.com/faq/246402
- Edit custom1.css file under css folder, put code at end of file
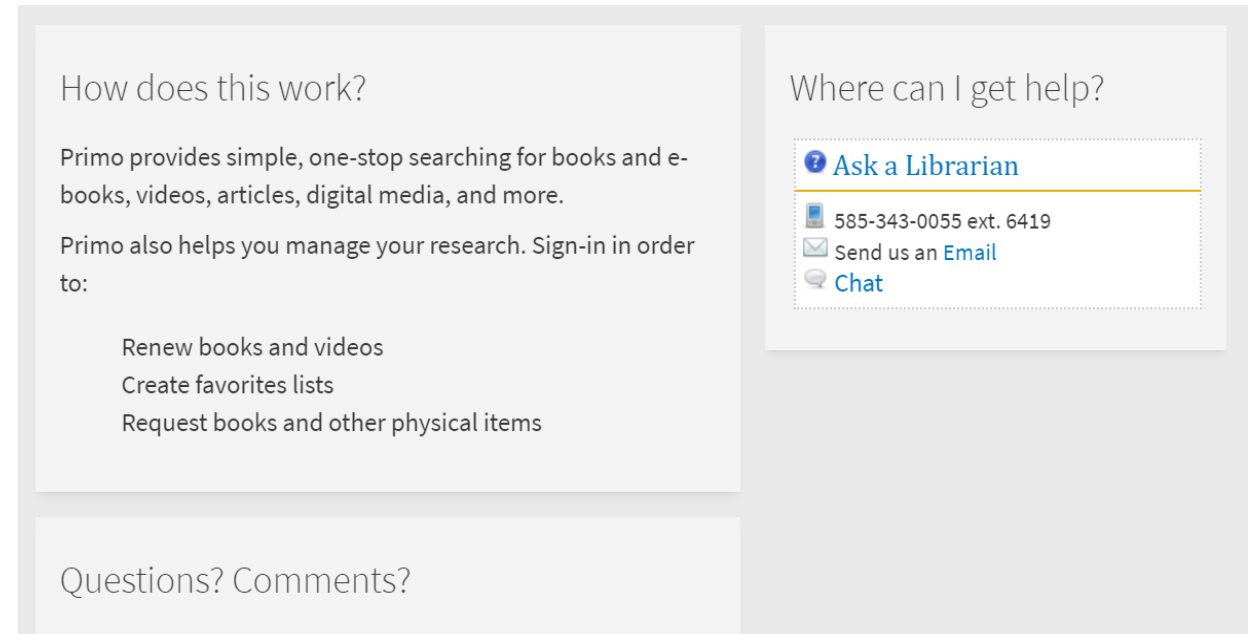- Edit wording in content: " …." to read whatever you want it to say

Code: (thanks to UW Libraries for sharing):

```
/* LOCAL BANNER */
body::before {
    content: "Our campus is currently
experiencing problems with …";
    display: inline-block;
    background: #ecd90f;
    text-align: center;
    width: 100%;
    font-weight: bold;
}
```

Primo Homepage - Body

If patrons mostly use your library page widget to search, they may never see your homepage, but to change content:

- Follow instructions in previous slide for customization package
- Edit homepage_en.html file under HTML->Homepage folders

How does this work?

Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.

Primo also helps you manage your research. Sign-in in order to:

    Renew books and videos
    Create favorites lists
    Request books and other physical items

Questions? Comments?

Where can I get help?

Ask a Librarian

585-343-0055 ext. 6419
Send us an Email
Chat

Primo Homepage, cont.

Things to note:
- Two column layout with first column at 60% of page and second column at 40%
- Could add div above first div that would span whole page
- md-card coding is what makes the layout work responsively and look the way it does
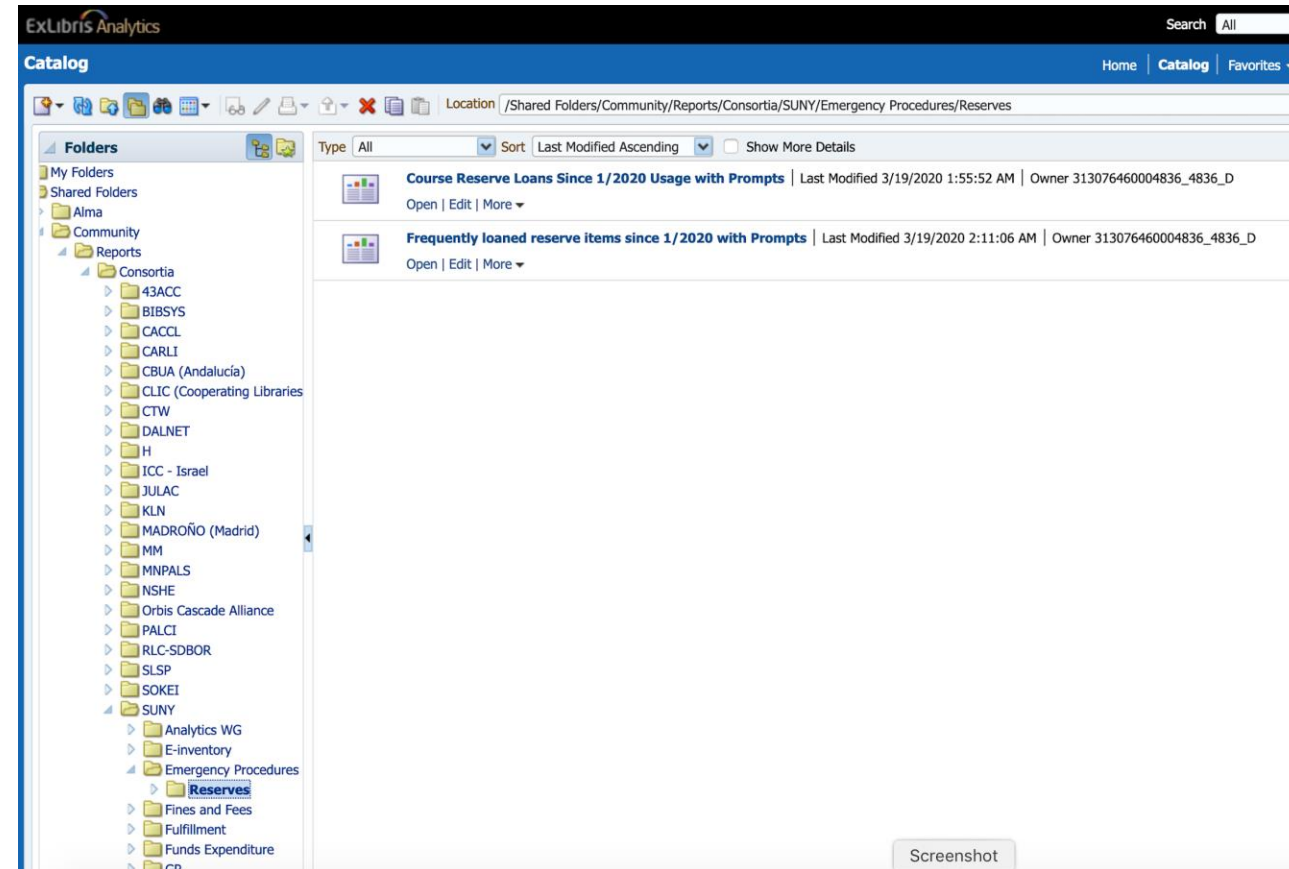
Adding Chat

Notes:
- JavaScript can be fiddly – may need trial and error to get your script code into the right spot
- If you can't get it to work, try creating a new widget in your chat system
- If you don't have time or interest in making chat interactive, could just put a link in your header or on your homepage

References:
- [How can I get my chat widget to work on the Primo VE landing page?](#) SLSS FAQ
- [Embedding LibAnswers Widget in Primo](#) Recent Basecamp discussion

More Analytics Reports That May Be Helpful

• Gail has created a few more reports to help identify high usage course reserve titles

• If there are any other reports that you think would be helpful, please let us know.

• Shared Folders-->Community-->Reports-->Consortia-->SUNY-->Emergency Procedures-->Reserves

References

https://slcny.libguides.com/libraries-COVID19