



# COVID 19

# Preparation Follow-Up

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://slcnyc.libguides.com/ld.php?content\\_id=52873224](https://slcnyc.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

INSMN\_FU

Code INSMN\_FU

Fulfillment Unit Details | Fulfillment Unit Locations | Fulfillment Unit Rules

Rule Type: Loan

Institution Rules List

+ Add Rule

Filter: All

| Enabled                             | Move Up | Move Down | Rule Name                         | Description                       | Output                   | Updated By | Update Date |     |
|-------------------------------------|---------|-----------|-----------------------------------|-----------------------------------|--------------------------|------------|-------------|-----|
| <input checked="" type="checkbox"/> |         | ▼         | Temporary Expanded RS Loan Period | Temporary Expanded RS Loan Period | RS Long Loan             | SUNY, SLC  | 03/16/2020  | ... |
| <input checked="" type="checkbox"/> | ▲       | ▼         | RS long loan fac staff grad       | -                                 | RS Long Loan             | PRITTIS    | 03/16/2020  | ... |
| <input checked="" type="checkbox"/> | ▲       | ▼         | RS long loan no renewals          | -                                 | RS Long Loan No Renewals | PRITTIS    | 03/16/2020  | ... |
| <input checked="" type="checkbox"/> | ▲       |           | RS short loan                     | -                                 | RS Short Loan            | PRITTIS    | 03/16/2020  | ... |

# Resource Sharing and Fulfillment Configuration Changes - Borrowing Loan Periods

INSMN\_FU ▼

Code INSMN\_FU

Fulfillment Unit Rules Editor ▼

Name \*


Description

Created By SUNY, SLC Created On 03/16/2020

Updated By SUNY, SLC Updated On 03/16/2020

Input Parameters ▼

[+ Add Parameter](#) ▼

 No records were found.

Output Parameters ▼

Terms of Use \*  ▼

# Resource Sharing and Fulfillment Configuration Changes - Lending Loan Periods

Code INSMN\_FU

Fulfillment Unit Details | Fulfillment Unit Locations | Fulfillment Unit Rules

Rule Type: Lending Resource

Institution Rules List

+ Add Rule

Filter: All

| Enabled                             | Move Up | Move Down | Rule Name                         | Description                       | Output                       | Updated By | Update Date |     |
|-------------------------------------|---------|-----------|-----------------------------------|-----------------------------------|------------------------------|------------|-------------|-----|
| <input checked="" type="checkbox"/> |         | ▼         | Temporary Expanded RS Loan Period | Temporary Expanded RS Loan Period | Long Lending Loan - 112 days | SUNY, SLC  | 03/16/2020  | ... |
| <input checked="" type="checkbox"/> | ▲       | ▼         | Lending short loan due date       | -                                 | Lending Short Loan           | PRITTIS    | 03/16/2020  | ... |
| <input checked="" type="checkbox"/> | ▲       |           | Lending Long Loan                 | -                                 | Lending Long Loan            | PRITTIS    | 03/16/2020  | ... |



# Resource Sharing and Fulfillment Configuration Changes - Lending Loan Periods

INSMN\_FU ▼

Code INSMN\_FU

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Fulfillment Unit Rules Editor ▼

Name \*

Description


Created By SUNY, SLC Created On 03/16/2020

Updated By SUNY, SLC Updated On 03/16/2020

---

Input Parameters ▼

[+ Add Parameter](#) ▼

  
No records were found.

---

Output Parameters ▼

Terms of Use \*  ▼

# Resource Sharing and Fulfillment Configuration Changes - Automatic Renewals

| Workflow Profile | Type                           | Steps  |
|------------------|--------------------------------|--|
| 1 Borrowing      | Borrowing<br>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



INSMN\_FU ▼

Code INSMN\_FU

Fulfillment Unit Details | Fulfillment Unit Locations | Fulfillment Unit Rules

Rule Type **Borrowing Resou** ▼

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"/> |         | ▼         | Temporary RS Privileges for Open SUNY | Temporary RS Privileges for Open SUNY | Borrowing Allowed - no personal delivery | SUNY, SLC  | 03/16/2020  | ... |
| 2 | <input checked="" type="checkbox"/> | ▲       | ▼         | Borrowing Not Allowed                 | -                                     | Default terms of use                     | PRITTIS    | 03/16/2020  | ... |
| 3 | <input checked="" type="checkbox"/> | ▲       |           | Borrowing Allowed                     | -                                     | Borrowing Allowed                        | PRITTIS    | 03/16/2020  | ... |

# Resource Sharing and Fulfillment Configuration Changes - Open SUNY RS Requesting



INSMN\_FU ▼

Code INSMN\_FU

Fulfillment Unit Details | Fulfillment Unit Locations | Fulfillment Unit Rules

Rule Type **Borrowing Resou** ▼

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"/> |         | ▼         | Temporary RS Privileges for Open SUNY | Temporary RS Privileges for Open SUNY | Borrowing Allowed - no personal delivery | SUNY, SLC  | 03/16/2020  | ... |
| 2 | <input checked="" type="checkbox"/> | ▲       | ▼         | Borrowing Not Allowed                 | -                                     | Default terms of use                     | PRITTIS    | 03/16/2020  | ... |
| 3 | <input checked="" type="checkbox"/> | ▲       |           | Borrowing Allowed                     | -                                     | Borrowing Allowed                        | PRITTIS    | 03/16/2020  | ... |

# Resource Sharing and Fulfillment Configuration Changes - Open SUNY RS Requesting

INSMN\_FU ▼

Code INSMN\_FU

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Fulfillment Unit Rules Editor ▼

Name \*



Description


Created By SUNY, SLC Created On 03/16/2020

Updated By SUNY, SLC Updated On 03/16/2020

---

Input Parameters ▼

[+ Add Parameter](#)  

| Name         | Operator | Value     |   |
|--------------|----------|-----------|---|
| 1 User Group | =        | Open SUNY |  |

---

Output Parameters ▼

Terms of Use \*  ▼

# 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>

# 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](mailto: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

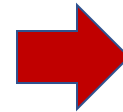


# Primo Settings



# Deactivate General Electronic Service for ILLiad

The screenshot shows the Alma Configuration interface. The top navigation bar includes a back arrow and the text 'Alma Configuration'. Below this, there's a 'Configuring' section with a dropdown menu set to 'Genesee Community College' and a search bar. The main content area is divided into four columns of configuration options. The 'General Electronic Services' option in the 'Discovery Interface Display Logic' column is highlighted with a red rectangular box.



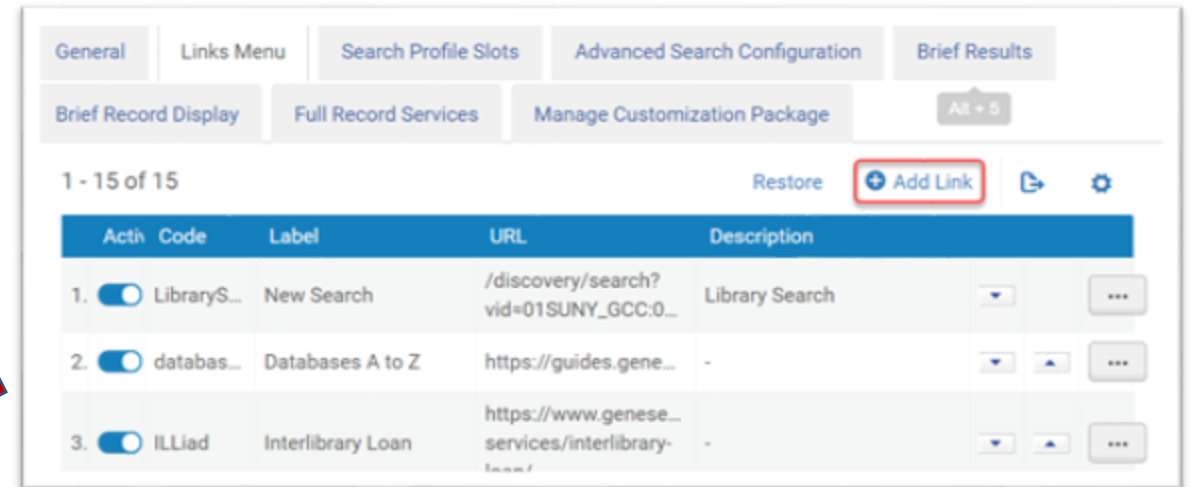
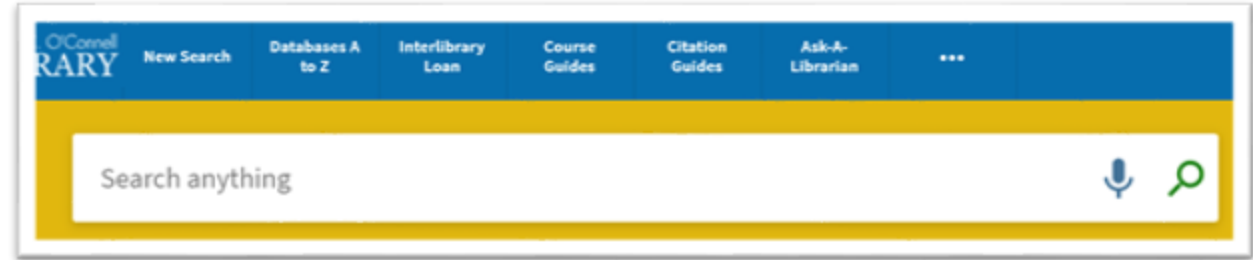
The screenshot shows the 'General Electronic Services' page. It features a table with the following columns: 'Sha', 'Active', 'Service Name', 'Service Code', and 'Public Name'. The 'Active' column is highlighted with a red box. The table contains five rows of service data.

| Sha | Active                              | Service Name                 | Service Code   | Public Name           |
|-----|-------------------------------------|------------------------------|----------------|-----------------------|
| 1   | <input checked="" type="checkbox"/> | Doc Del & Physical Borrowing | DocDel         | Get It                |
| 2   | <input checked="" type="checkbox"/> | ILLiad                       | ILLiad         | Get Full Text         |
| 3   | <input checked="" type="checkbox"/> | Print Journal ILLiad link    | Print_Journals | Get It Print          |
| 4   | <input checked="" type="checkbox"/> | ProQuest                     | ProQuest       | ProQuest dissertation |
| 5   | <input checked="" type="checkbox"/> | ProQuest                     | ProQuest       | ProQuest dissertation |

# 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

A screenshot of the 'Define Menu Link' form. It has four input fields: 'Code \*', 'URL \*', 'Label \*', and 'Description'. The 'Code \*' field is currently empty.

Define Menu Link

Code \*

URL \*

Label \*

Description

# 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

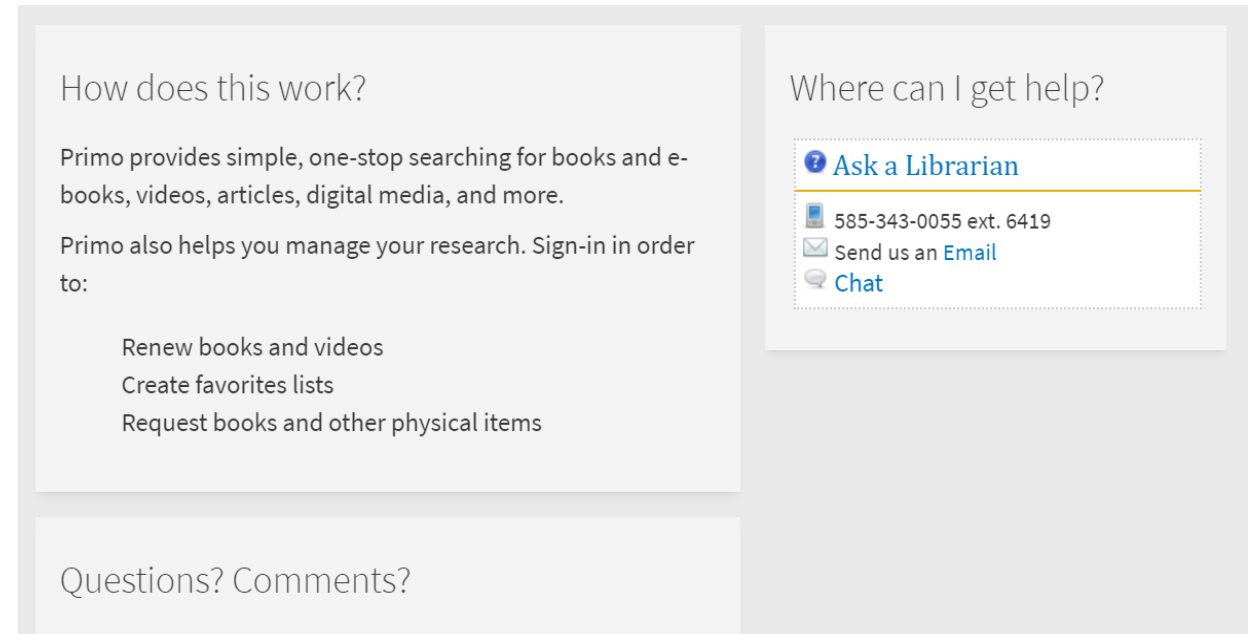
Code: (thanks to UW Libraries for sharing):

```
/* 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



The screenshot shows a two-column layout for the Primo homepage body. The left column is titled "How does this work?" and contains text about Primo's search capabilities and research management tools. The right column is titled "Where can I get help?" and features a "Ask a Librarian" widget with contact options: phone (585-343-0055 ext. 6419), email, and chat. Below these columns is a "Questions? Comments?" section.

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

Where can I get help?

[Ask a Librarian](#)

585-343-0055 ext. 6419

Send us an [Email](#)

[Chat](#)

Questions? Comments?

# Primo Homepage, cont.

```

<div flex="60" layout="column">
  <md-card class="default-card">
    <md-card-title>
      <md-card-title-text>
        <span class="md-headline">How does this work?</span>
      </md-card-title-text>
    </md-card-title>
    <md-card-content>
      <p>Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.</p>
      <p>Primo also helps you manage your research. Sign-in in order to:</p>
      <ul>
        <li>Renew books and videos</li>
        <li>Create favorites lists</li>
      </ul>
      <li>Request books and other physical items</li>
    </ul>
    </md-card-content>
  </md-card>
  <md-card class="default-card">
    <md-card-title>
      <md-card-title-text>
        <span class="md-headline">Questions? Comments?</span>
      </md-card-title-text>
    </md-card-title>
    <md-card-content>
      <a href="https://www.genesee.edu/library/about-the-library/feedback/" class="arrow-link">
        Let us know what you think!
        <prm-icon link-arrow>
          <md-icon md-svg-icon="./images/chevron-right.svg"></md-icon>
        </prm-icon></a>
    </md-card-content>
  </md-card>
</div>
<div flex-x flex="40" layout="column">
  <md-card class="default-card">
    <md-card-title>
      <md-card-title-text>

```

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:

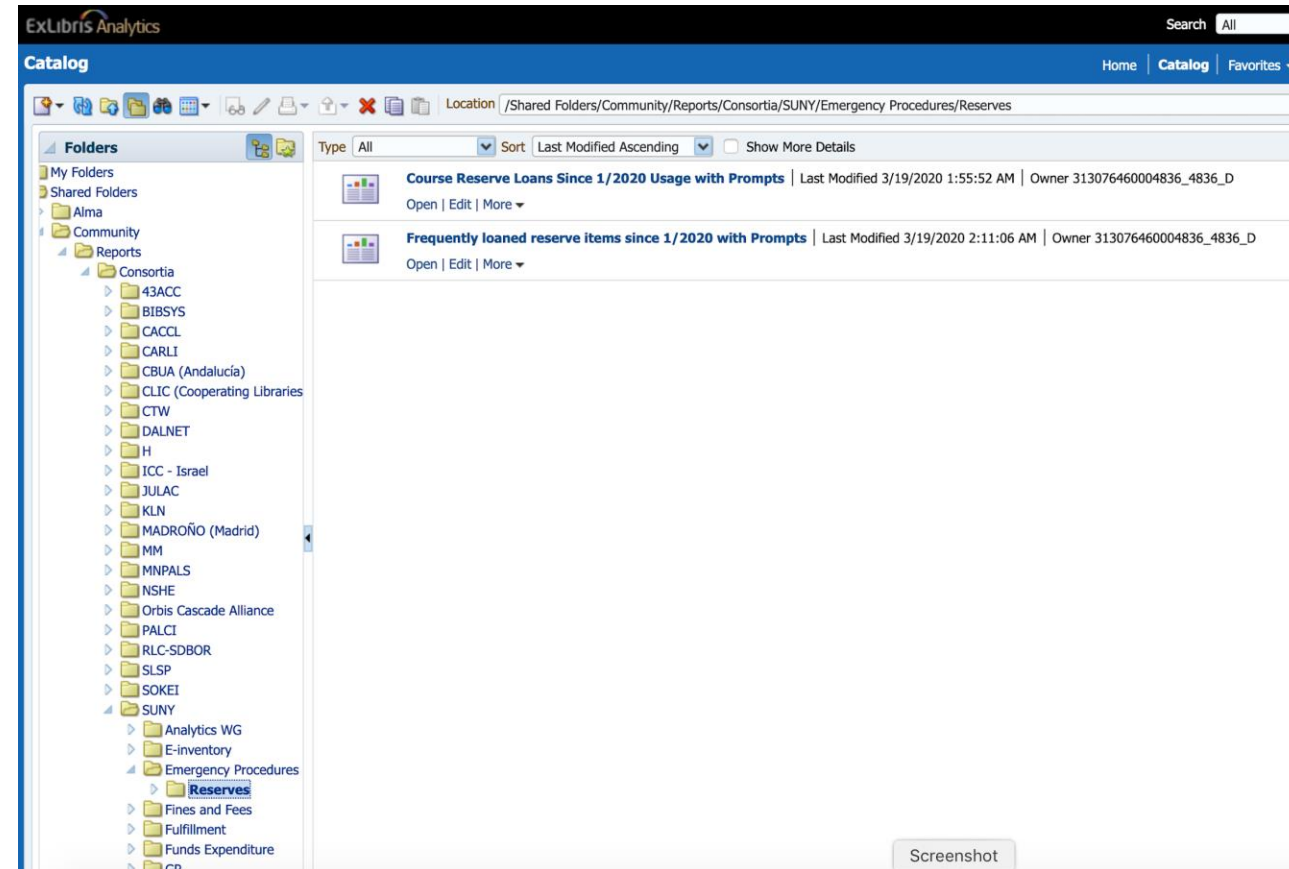
- JavaScript can be fiddly – may need trial and error to get your script code into the right spot
- If you can't get it to work, try creating a new widget in your chat system
- If you don't have time or interest in making chat interactive, could just put a link in your header or on your homepage

## 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>



[SUNY Libraries Consortium](#) / [SLC Guides](#) / [LSP](#) / [SUNY Libraries COVID-19 Planning and Information](#) / [Home](#)

## SUNY Libraries COVID-19 Planning and Information

- Home
- Alma/Primo Configuration**
- National Benchmarking
- SUNY Surveys/Resources
- Work from Home & Remote Projects
- Vendor & Other Resources

This guide is meant to help SUNY Libraries navigate the quickly moving changes associated with COVID-19.

Below are top SUNY sites for COVID-19 information.

- [SUNY Online: COVID-19 Information for Students](#)  
Main site that coordinates information on SUNY's response to COVID 19 pandemic. (As of 3/17/2020)
- [SUNY's COVID-19 Response](#)
- [SUNY Support for COVID-19 Preparedness: SUNY Webinars & Trainings](#)
- [SUNY Remote Teaching Clinic](#)

