RSFC and FFC Open Forum: Part 2
July 30th, 2020

Agenda

- 20/21 RSFC and FFC Membership
- Fulfillment Restart Checklist
- CSU+ Request Limits
- ILLiad Mail to Address
- ILLiad as a Partner of Last Resort
- CSU+ Quarantine Guidelines
- Q&A

20/21 RSFC and FFC Membership

Resource Sharing

- Natalya Magazino, (Chair) , San Marcos
- Karla Salinas (Vice-Chair), Dominguez Hills
- Joe Gerdeman, Los Angeles
- Holly Richmond, San Luis Obispo
- David Rocha, Stanislaus
- Danny Soares, San Jose

https://calstate.atlassian.net/wiki/spaces/URS/overview

Fulfillment

- Jamie Lamberti, (Chair) , San Francisco
- Kim Wobick (Vice-Chair), San Bernardino
- Dawnelle Ricciardi, Sonoma
- Kari Grimm, Stanislaus
- Kelly Ann Sam, San Marcos
- Meta Hailu, East Bay

https://calstate.atlassian.net/wiki/spaces/ULMSA/overview

Fulfillment Restart Checklist

The Fulfillment Restart Checklist details Alma configurations and workflow recommendations for restarting services after closure.

https://calstate.atlassian.net/wiki/spaces/ULMSA/pages/1283522710/Fulfillment+Restart+Checklist

Recommendations for Reopening and Quarantining Items

https://calstate.atlassian.net/wiki/spaces/ULMSA/pages/1283424395/Recommendations+for+Reopening+and+Quarantining+Items

Please contact a member of the FFC to suggest changes list or recommendations.

Time to Reshelve

The Time to Reshelve function turns on a message in Alma and Primo giving an approximate expectation about when the item will be reshelved. The message in Primo can be customized.

Role Required: General Administrator or Fulfillment Administrator

Alma Customizations:

https://calstate.atlassian.net/wiki/spaces/ULMSA/pages/1283522604/Define+Time+to+Reshelve

CSU+ Request Limits

Role Required:

- General System Administrator
- Fulfillment Administrator

Configuration Path:

Library doing RS→ Fulfilment→ Physical Fulfillment→ Terms of Use and Policies

https://csu-sfsu.alma.exlibrisgroup.com/infra/action/pageAction.do?xmlFile

Search

< Back to Alma   ⚙ Alma Configuration

Configuring

Main Library ▼

Filter List

🔍 Look-up or select   🔍

Fulfillment

General

Library Management

Library Details

Opening Hours

Relationships

Circulation Desks

Temporary Item Creation Rules

Locations

Physical Locations

Physical Fulfillment

Fulfillment Units

Terms of Use and Policies

Item Policy

Advanced Policy Configuration

Digital Fulfillment

Digitization Departments

Resource Sharing

Rota Assignment Rules

Sending Borrowing Request Rules

General

Printers

Type here to search   11:55 AM 7/30/2020

ILLiad as a Lender of Last Resort

Role required: Fulfillment Administrator or General System Administrator

Tasks:

1. Generate an API key in ILLiad
2. Set up your ILLiad partner in Alma
3. Set up a rota template for your ILLiad partner
4. Set up your rota assignment rules
5. Set up Sending Borrowing Request Rules

https://developers.exlibrisgroup.com/blog/setting-up-the-alma-illiad-partner-of-last-resort-integration/

Generating the API Key in ILLiad

- Open the ILLiad Customization Manager

- System > Integration > WebPlatformConfig
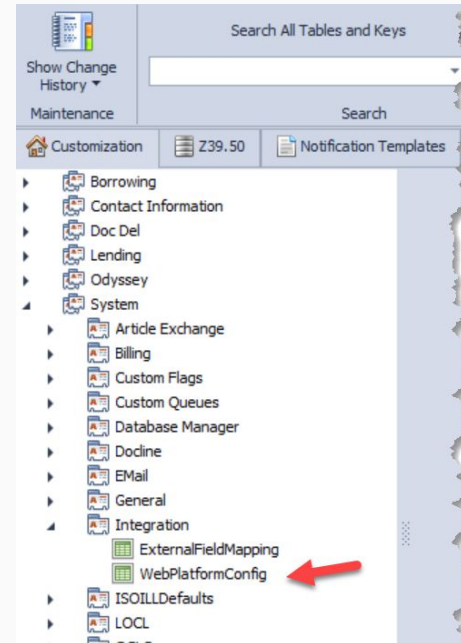
Generating the API Key in ILLiad

- Add a new record

  - Add your NVTGC code (ILL)

  - Click on the API Key field, then click the ellipses to generate

  - The BaseWebserviceURL is: https:{your ILL domain}/ILLiadWebPlatform/

Set Up Your ILLiad Partner in Alma

- Fulfillment > Resource Sharing > Partners > Add Partner

Set Up Your ILLiad Partner in Alma

- General Information tab

‹ **Resource Sharing Partner**   Cancel   Save

ILLiad   ⌄

| Partner Code: | ILLiad | Profile Type | NCIP | System Type | ILLiad |

General Information | Contact Information | Parameters | Notes

| Code * | **ILLiad** | Name * | **ILLiad** |

| Profile Type * | **NCIP** ▾ | Status | **Active** ▾ |

| System Type * | **ILLiad** ▾ |

| Average Supply Time | **5** | Delivery Delay (days) | **0** |

| Currency | |

| Locate Profile | ▾ |

| Default Partner | ☐ |

| Supports Borrowing | ☑ | Borrowing Workflow | **Borrowing NZ workflow** ▾ |

| Supports Lending | ☑ | Lending Workflow | **Lending NZ Workflow** ▾ |

Set Up Your ILLiad Partner in Alma

- **Parameters tab**

GENERAL INFORMATION

User identifier type *	Primary Identifier
URL template	
Enable service for guest user	Yes ● No
Disable service when	● Never
	○ When resource is owned by the campus
	○ When resource is owned by the campus and available
	○ When resource is owned by the institution
	○ When resource is owned by the institution and available
Loan period	60

Download Certificate

Request pushing method * : Open URL ● Link

Broker System NCIP URL : https://na03.alma.exlibrisgroup.com/view/NCIPServlet

Default library owner * : Resource Sharing

- **Broker System NCIP URL:**
  - https://[your alma instance].alma.exlibrisgroup.com/view/NCIPServlet

Set Up Your ILLiad Partner in Alma

- Parameters tab - cont'd

REQUEST ITEM

Bibliographic record ID type * — OCLC Number

Default location * — Borrowing Resource Sharing Requests

Support Borrowing ☑

Default pickup library — Library

CHECK-OUT ITEM

Default location * — Lending Resource Sharing Requests

Default item policy * — CalState RS Long Loan

ACCEPT ITEM

Default location * — Borrowing Resource Sharing Requests

Default pickup library — Library

Automatic receive ☑

Receive Desk * — Resource Sharing Desk

LOOK UP USER

Require Authentication   ○ Yes   ● No

- Parameters tab - cont'd

EXPORT TO THIRD PARTY

Export to third party   ○ No   ○ Using email   ● Using API

URL *   https://il████████/ILLiadWebPlatform/transactior

Export request ID name tag   CitedIn

Close request when exported   ☑

Your ILL domain

API key *   8████████████████████

Paste API key
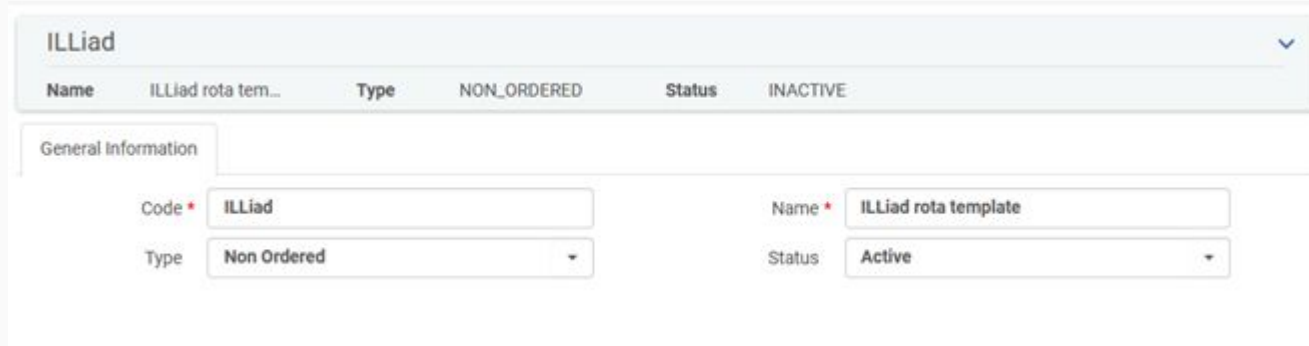
CREATE USER FISCAL TRANSACTION

Create fee using *   Ignore message   ▾

- Close request when exported
    - If this box is checked the request becomes inactive in Alma once exported into ILLiad. If not checked, the request stays active and you can continue receiving updates about the request from ILLiad via NCIP throughout its ILLiad lifecycle.

Set up a rota template for your ILLiad partner

- Fulfillment > Resource Sharing > Rota Templates > Add Template
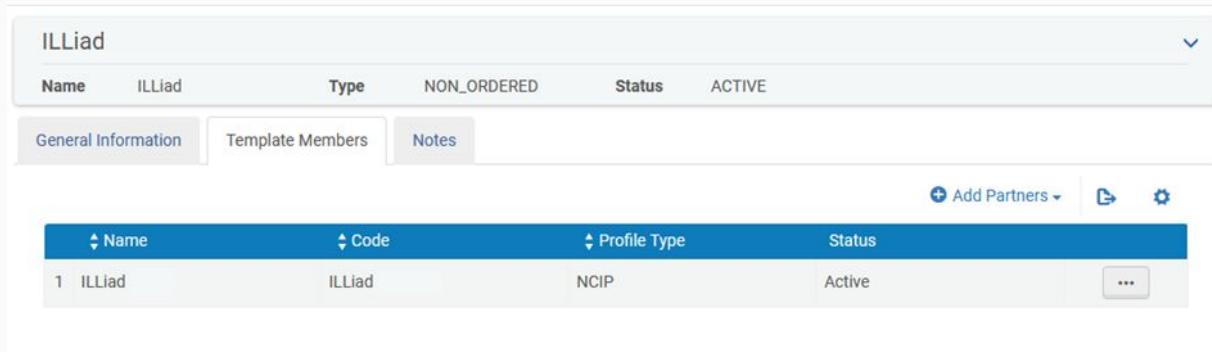
- Save and add members > Template members > Add partner > Locate and add the ILLiad partner

Set up your Rota Assignment Rules

- Alma Configuration > Fulfillment > Resource Sharing > Rota Assignment Rules
  - Duplicate the "CalState Rota Assignment Rule"

Set up your Rota Assignment Rules

- Create rule for ILLiad partner > Add rule

Rota Assignment Rules				⌄
Name	**Partner of Last Resort**			
Description	**Partner of Last Resort**			
Created By	**Staff, Ex Libris**	Created On	**12/05/2019**	
Updated By	**Magazino, Natalya Serge**	Updated On	**12/16/2019**	

Input Parameters			⌄

	Name	Operator	Value
1	Requested Format	Is Not Empty	-

Output Parameters		⌄
Rota Templates	**ILLiad**	

Set up your Rota Assignment Rules

- Ensure that the copy of "CalState Rota Assignment Rule" precedes "Partner of Last Resort".

Set up your borrowing request rules

- Alma Configuration > Fulfillment > Resource Sharing > Sending Borrowing Request Rules
  - Send Borrowing request rule CSU+ > Edit > Input Parameters > Edit > Add ILLiad partner

Identifying imported CSU+ requests in ILLiad

- Create an ILLiad routing rule to route requests to their own queue
  - Matchstring: t.CitedIn LIKE '01CALS%'

Process

Cancel Request | Renew Request | Send Delivery Notification

Routing

Route | Route To Document Delivery

Add Flag | Remove Flag

Cloning

Clone to Current User
Clone to Another User

OCLC

Policies Directory

Billing

Billing

User

View | Send Notification

System

Pending Updates | Import into Resubmission

Detail | History | OCLC | Z39.50 | PubMed/Docline | Google Search | OCLC AE | Proquest Dissertation Abstracts

Transaction Date	5/21/2020 1:46 PM
Delivery Method	Hold for Pickup
Service Level	Regular
Billing Account	

Not Wanted After	
Site	
Shipping Options	
Doc Type	

Lending String
Lender
System ID   OCLC
OCLC Status

Article Info | Loan Info | Collections | Local Holdings | Imported Request | User | Copyright | Invoice | A...

Title	GRE prep 2019.
Author	
Publisher	Kaplan Publishing
Place	
Date	[2018]
Edition	
Original Loan Author	
Original Loan Title	

☐ Accept Alternate Edition
☐ Accept Non English
☐ Allow Copies?
☐ Copyright Already Paid?
☐ Allow Renewals?
☐ Library Use Only?
☐ Replacement Pages?
☐ Priority Shipping
☐ Ariel

Item Information

Call Number	
Location	
Due Date	
Reason For Cancellation	Other:
Item Num/Ref Num	
ISxN	9781506234588
Special Instructions	
Max Cost/Pieces	

Date ▲	Note	Type	Added By

Citation Information

Cited In	01CALSUSM0014564
Title	
Date	
Volume/Pages	

RSFC Guidelines for Handling Materials During COVID

Guidelines for Handling CSU+/Resource Sharing Materials During COVID-19

Incoming Materials

1. Identify an area to quarantine incoming deliveries. The area should be located away from where staff do their work. Ideally, the quarantine area will be where the courier drops off deliveries. Ensure staff know where incoming materials are being quarantined so the area can be avoided.

2. If bags must be transferred to a different area for quarantine, face masks should be worn, and disposable gloves should be worn and then disposed of immediately afterwards. Always immediately dispose of gloves and wash hands after handling non-quarantined materials.

3. Identify a method to keep track of when shipments arrive.

4. Materials may be handled and processed after shipments have been quarantined for at least 96 hours. As an extra precaution, face masks should be worn, and disposable gloves should be worn and disposed of after handling and processing materials. Do not touch the mouth, nose, or eyes as transmission may occur after touching contaminated materials and surfaces.

5. While materials should be quarantined for at least 96 hours, the length of the quarantine period is up to each individual campus and the comfort level of staff handling the materials. The research is still evolving. Results from test 1[1] of the REALM study indicate the virus as undetectable after 72 hours on five common types of library materials while results from test 2[2] indicate the virus can last for up to 96 hours on other types of materials.[3]

Outgoing Materials

1. It is not necessary to quarantine outgoing materials for the courier. However, ensure there is a quarantine period in between each staff person handling materials. For example, if items are checked in on Monday by circulation staff, resource sharing staff can process and prepare those items for shipment on Friday.

2. If the staff person who pages the materials is different than the staff person packaging and preparing the materials for shipment, consider observing an additional 96 hours of quarantine time between both tasks. If you cannot observe an additional 96 hours of quarantine, be sure to wear a mask and disposable gloves.

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[1] https://www.webjunction.org/content/dam/WebJunction/Documents/webJunction/realm/test1-report.pdf
[2] https://www.webjunction.org/content/dam/WebJunction/Documents/webJunction/realm/test2-report.pdf
[3] These studies unfortunately do not address courier bags.

July 2020

- https://calstate.atlassian.net/wiki/spaces/URS/pages/1288372229/Quarantine+Guidelines

Q&A