



### Overview of Action Items

SirsiDynix Consulting Services has gathered together the following action items to assist libraries if the decision is made to close due to the COVID-19 outbreak. A general overview of ILS and OPAC considerations are provided. If you are a multi-library site, this document assumes that all libraries in your system are closing.

In preparation for a short-term closure of all library locations, various changes should be made to Workflows, Enterprise/eLibrary and BC Mobile. In summary, a library should plan to:

- modify due dates for items currently charged to patrons
- extend pick-up dates for items available on the hold shelf
- pause the sending of notices to patrons
- in as many formats possible, notify patrons of the library closure

### Modify Due Dates

Obviously, there will be items in your system due during this unexpected closure. You can edit those due dates in batch using the "**Edit Due Dates Globally**" report available in the **Circulation group** of reports. Please consult the Help documentation for more detailed information about this report. Tips and suggestions for use in this context are provided below.

On the **Charge Selection** tab select all charges with due dates that fall within your planned closure period. On the **New Due Date** tab, enter a new due date for these items. This could be the day you plan to re-open or perhaps even a week after you plan to re-open.

Note that the **New Due Date** tab includes an "**Update database**" option. Leave this check box deselected to run the report in **test mode**. If you are happy with the results you can run the report again with the update option selected.

### Extend Hold Pick-up dates

For all items currently available on the hold shelf, pick-up by dates should be modified. This must to be done manually for each item via the "**Modify Holds for Item**" wizard.

To modify a hold pick-up by date:

1. **Scan** the barcode for the first item on the hold shelf into the "Modify Hold for Item" wizard
2. **Select** the available hold
3. Click **Modify**
4. Enter a new **Pickup by date**
5. Click **OK**

6. **Repeat** for all other items on the hold shelf

Modify Holds for Item

Photo et cinéma  
778 S27P Copy:1 ID:310002199

Identify item  
Item ID: 310002199 1

List of Holds  
 Select All

Modify »	User ID	Recall	Pickup at	Pickup by	Expires
2 <input checked="" type="checkbox"/>	72724	NO	ARROW...	3/19/20...	NEVER
<input type="checkbox"/>	27436	NO	ARROW...	NEVER	4/7/2020

Modify Holds for Item

Modify Holds Fields

Allow Recall  No Recall  Recall now (RUSH)

Pickup at: [dropdown] Expires: [dropdown]

Pickup by: 03/31/2020 4

Date suspended: [calendar icon]

Mail Item to User:  Yes  No Mail service: [dropdown]

Comment:  Append  Replace  Remove 5

OK Cancel

Get Item Information 3 Modify

If you have a high volume of available holds and do not have enough staff to manage manually editing each item hold, a custom report is available. Until further notice the "Extend Hold Pickup Expiration Date Report" is available from the Consulting Catalog free of charge. It can be requested here: <https://support.sirsiidynix.com/service/psc-8038>. Due to scheduling restrictions it may take multiple business days for this report to be installed, that delay may increase with high demand. Please plan accordingly. So that the libraries in most need have quicker access, please only request this report if you have no other options.

### Pause Sending of Notices

Any report that generates a notice to patrons should be suspended until the library reopens. To suspend a notice report, navigate to **Reports > Scheduled Reports**. Click the **Suspend** button. Select the **check box** next to each notice report you need to suspend and click **Suspend**. Note, it is neither necessary or recommended that you suspend all reports in Symphony. Only isolate those that send notification to patrons.

Depending on how you have your notices configured, when you reopen it can sometimes be challenging to "get caught-up" with notices, specifically if your notices are *not* selecting dates "Since the beginning of the system".

## Notify Patrons of Library Closure

### Enterprise

If you are an Enterprise site, it is recommended that a closure note be added to your default profile and any other profiles that are live to the public. This can be done in **Profiles** (aka Manage Profiles). Find the profile you wish to edit and click the **Preview** (magnifying glass) icon. Use the options in the header to add a closure notice. Screenshot below.



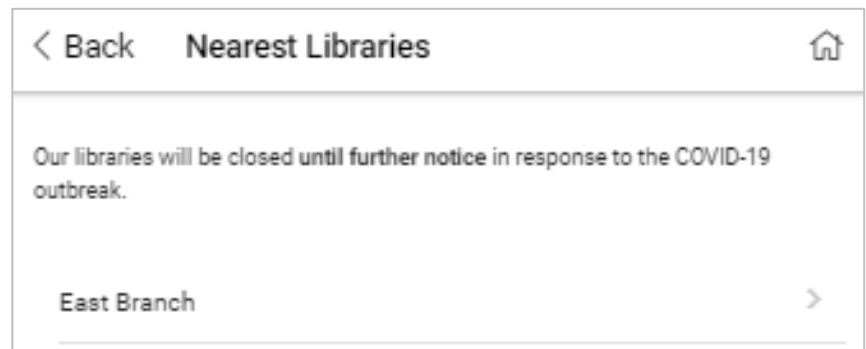
### eLibrary

If you are an eLibrary site, modify the text in the following **variable** in `~/Unicorn/Webcat/Config/system.env`:  
TITLE|Library closed May 1-June 1 for renovation|

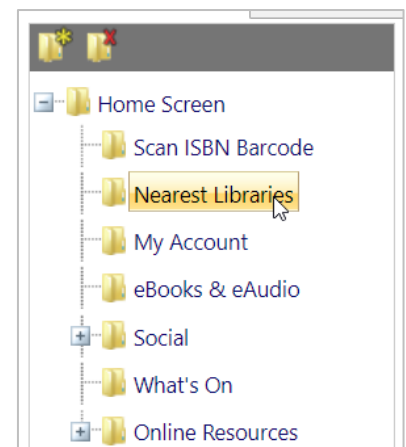
### BC Mobile

Library hours can be hidden from the app via BC Mobile CMS. Navigate to **Channels** and select a library channel. Move to the **Mobile Channel Settings** tab. Deselect the **"Show Opening Hours"** check box.

Additionally you can add a message to the "Nearest Libraries" tab alerting the public of the closure. Example to the right and instructions below.



This text can be added in **Mobile Apps**. Select your app. Click the **plus sign** next to the **Home Screen** tab and select **Nearest Libraries**. Screenshot to the right.



Click on the **"Edit Tab: Nearest Libraries"** button when it appears. Type a message into the **Prefix Content** box as shown below and click **Save**.

Header Image  No file chosen

Prefix Content

Normal A **B** *I* U  $x_2$   $x^2$

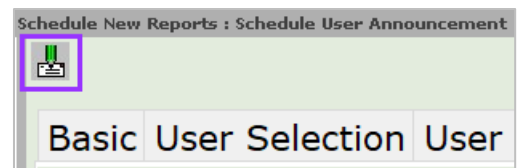
Our libraries will be closed **until further notice** in response to the COVID-19 outbreak.

## WorkFlows

In addition to adding notification in OPAC products, you may also want to send email notification to all patrons with email addresses in their records. This can be done with the **General Announcement** report found in the **User group** of report. Please consult the Help documentation for more detailed information about this report. Tips and suggestions for use in this context are provided below.

On the **User Selection** tab, you can make no selections in this report and all user records will qualify. When you schedule the report you will schedule it to auto-email patrons with email addresses, so there is no need here to select patrons based on email. If you have a large patron database, however, you may want to select only those patron with a recent last activity date -- perhaps within the last year to three years -- or those patrons with unexpired cards.

Notice text can be created using the **Notices helper** on the **General Notice** tab of this report (screenshot to the right). If you do not see the notice helper, close the report, right-click on the "**Schedule New Reports**" wizard and select **Properties**. In the window that displays, check the "**Display notices helper**" checkbox and click **OK**. Reopen the report and the helper will be available to you.



Do not click "Run Now" when configuring this report. Instead, click "**Schedule**". To generate emails to patrons check the "**Auto email to recipients with email address in their patron record**" checkbox. Modify the "**Email Subject Line**" and "**Reply to**" fields as needed.

Auto email to recipients with email addresses in their patron record

Email Subject Line:

Reply to: