Overview of Action Items

SirsiDynix Consulting Services has gathered 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 Horizon, Enterprise/HIP and BC Mobile. In summary, a library should plan to:

- set closed dates so items are not due on the days library locations are closed. Also, fines are not charged for a due date if the "Charge for closed day" check box in the location table is not checked
- extend due dates
- you may also stop charging of fines by configuring the Fine rate privilege option in the circ_privilege_code table
- configure request/hold for closed locations to prevent items owned by the closed location filling requests, and to prevent the need to send items to fill requests at closed locations
- pause the Day-End and sending of notices to patrons
- in as many formats as possible, notify patrons of the library closure

Set closed dates in calendar exceptions.

You can set up calendar exception hours for holidays and other closed days either directly in the location table or in the calendar_exception table. The calendar_exception table is easier to work in, so instructions for editing the calendar exception are provided below.

1. Open table editor
2. Open the ***calendar_exception*** table - all the holidays for all locations will show up. If you want to see holidays for only one location, do ***Alt F2*** to pull up a search menu, and then search by location
3. To add a new holiday, click the New button and fill out the appropriate field. For instance:
    a. Location: main
    b. Date: 01/20/20
    c. Description: Coronavirus / Covid 19
    d. You can leave the rest of the fields blank, unless you are registering an early close day rather than a full holiday, in which case you would enter the appropriate open and closed times

4. **Save** and **Close** the record.
5. To copy that exception to another location, highlight the line and click the dropdown **File menu > Copy record**. Change the location code to the new location code and **Save** and **Close** the record.

Note that whatever additions or changes you make directly to the calendar_exception table will display in the location table.

Requests/Holds

Usually when a location is closing, the library may want to do 2 things:

a. Prevent items owned by the closed location from filling requests
b. Prevent the need to send items to fill requests at the closed location

If desired, disable new requests for a branch or branches as per the instructions below:

1. Open table editor
2. Open **location_group** table, and click **New** to add a location_group like **all_loc**. This location group should include all locations that are closing.

3. Open *circ_parameter* table and for *circ_parameter 29 (request privileges)*, create an exception where the value is 0, and item location, borrower location, circulation location, and opac location are each set to *all_loc*. This exception will block requests being placed /filled against the closed locations.

Note: Before you make the circ_parameter 29 changes, please carefully record what the values were before your changes.

Note: remember to remove the circ 29 exceptions once the library location re-opens.

If the closing period is quite long, you might want to change the 'pickup location' on the existing requests from the closed location to a nearby open location. You may contact Customer support for assistance.

4. If you wish not to expire holds during the closure, remove the DeExphold ("Expire Holds") step from Day End:

   a. Open *table editor*
   b. Open the *menu* table (labeled "Xlmop menus")
   c. Hit *Alt-F2* to pop up a search menu and search for the "*MDayEnd*" menu
   d. Locate the *Expire Holds* menu option and click *Edit*
   e. In the first box, change the menu listed from *MDayEnd* to *MDESave*
   f. *Save* and *Close* the record
   g. Reopen Horizon and set up day end to run as usual
   h. You may ignore these steps if you choose not to run Day End during the closure

5. You can also extend the expiry dates for holds that are currently on your hold shelf.

   Note: If you have the request_edit view available in table editor, you can do this batch change. If you do not have the request_edit view, or if the request_view does not have the required columns as per the steps provided below, contact Customer Support.

   a. Open *table Editor*
   b. Open the *request_edit* table

c. The search menu comes up. Hit *Cancel* twice to dispel it. You need a compound search menu instead.
d. Hit *Alt F2* or click the drop-down *File menu > Compound search*
e. Search by:
   - pickup location AND
   - hold expiry date (this will be the old date, the one you want to change) AND
   - request status = 1 (hold shelf)
f. The list comes back; highlight the rows. If there are more than 100 rows, highlight them only 100 at a time
g. Click the Edit button
h. Answer "*OK*" to the "***Do you wish to make a batch change to all selected records***?" prompt
i. Change the ***Hold Expiry date*** from its original value to the new value
j. ***Save*** and ***Close***

Fines

If you don't want to charge fines for the closed period, ensure that your location table's "Charged for closed days" box is unchecked.

1. Open ***table editor***
2. Open the ***location*** table
3. Select all the locations that are closed
4. Click Edit and answer "OK" to the "***Do you wish to make a batch change to all selected records***?" prompt
5. Uncheck ***Charge for Closed Days***

6. ***Save*** and ***Close.***
7. You may even want to set your fine rates to zero for the duration of the library location closure. You do this in the circ_privilege_code table
   1. Open ***table editor***
   2. Open ***circ_privilege_code*** table
   3. For each location group of the closed location, edit the ***Fine rate*** privilege
   4. Adjust Fine Rate to 0 as required for all borrowers

5. *Save* and *Close*

Note: If you make fine changes, please carefully record what the values were before your changes.

Note: When staff start checking in items after the closure, make sure to change the CKI date to the last real open day. To do so, in CKI, click the drop-down CKI menu and choose the "Change CKI Date" option

Due Dates

You may opt to extend due dates for items that are already checked out. You may do so in Item Group Editor (IGE):

1. Open *Administration menu* > *Group Editor Menu* > *Item Group Editor*
2. When the search menu pops up, search by due_date. For example, enter the date like 07/05/04 or whatever your date format is.

   Note: If due date is not among your search option, you may contact Customer support for assistance.
3. Highlight all the rows that have that due date

   NOTE: if there are more than several hundred rows, you may want to do them in batches.
4. Click the Edit button
5. Click OK at the screen that says *Do you wish to make a batch change to all selected records*?
6. On the resulting screen, locate the due_date field

   NOTE: If the due date field is blank, back out and try again. That is, if you're changing all the records that share a particular due date, that due date should show up in the due date field. If it doesn't, it means you've inadvertently done something wrong with the search or the select and pulled in records with different due dates.

   If you try to renew items that already have an overdue block, you'll see an error saying "Integrity trigger failed: Can't change due date IF over due block EXISTS, try renewing the item." In that case, you either need to renew the item in CKO as suggested, or contact Customer Support for assistance.
7. When the save completes, click *Done*
8. Finish the rest of the records, if there are any

Day End and Notices

Day End will typically not run on a closed day, although in practice it often will ignore holiday exceptions and run as usual. However, note that you can choose not to run Day End while you are closed. If you choose not to run Day End on days the library is closed then the Day End functions for Auto-renewals or for generating notices, and create and output notices will also not run for all locations.

If needed, you may contact Customer Support for further consultation.

Additional tasks

Follow these additional steps after you make any of the changes outlined above:

1. Horizon workstations need to have Horizon shut down and restarted
2. If you are still using HIP, Jboss needs to be restarted. If you use our BLUEcloud products, refresh Web Services

3. If your site uses SIP self-check or iTiva Telemessaging, you'll need to restart the related SIP services
4. Restart Day End (i.e. go to the Day End workstation and close both the Day End manager and the Horizon client Log back into Horizon and set Day End up afresh)
5. Contact Customer Support team if you need further consultation

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.

Horizon Information Portal (HIP)

If you are HIP, you may add a closure message on the first subtab of the home tab:
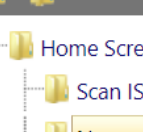
1. Log into the HIP Admin console
2. Click on Customize > Interface > Tabset
3. Select the link of the tabset that contains the subtab you're going to edit
4. Click on **Edit Sub-Tabs**, then click on the subtab to edit
5. At this next page, you can edit the subtab name to add the closure message
6. After you have finished editing the sub-tab, click "OK"
7. Click "Done" at this next page
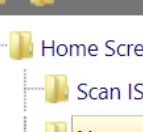8. Restart JBoss to implement your changes

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   Choose File   No file chosen

Prefix Content

Normal | T̄ | A | **B** | *I* | U | ☰ | ☰ | x₂ | x² | ☰ | ☰ | ☰ | ☰ | ☰ | S | ∞ | ⌀ | ✎ | — | ‹›

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