

Personal Librarian

Update Setup for Yale College PL Program

Add New Personal Librarian:

- Make sure PL name already in Drupal, check at web.library.yale.edu/users [1], click edit, go to the bottom "Admin Field", make sure PL has "general editor" role.
- Add New PL Page: Content > Add Content > Personal Librarian
 - ** The PL Page Tile use Profile's Name area - the official name, which can be changed only by web user administer.
 - ** The url for PL page using Page title with string transform to lower case and add hyphen for space
- For Divinity School PL, Change "Sub-section" from "Yale College Personal Librarian Program" to "Divinity Library"
- Go to bottom, open "Authoring Information", change "Authored by" from your name to the new PL's name (type in first couple letters of PL's name, will auto show name list to pickup)
- Change "Publishing options" to "published"
- Save
- Have the new PL update the new PL page (PL Message, Related Information for more links) , also update information on personal profile follow the instruction at [here](#) [2]

Add New Student

- Content > Add Content > Add New Content Type "Yale College PL Program"
- Fill in the following fields: Title (with Netid), Student Name, Class Year, Personal Librarian (should show name list after type in first few letters), Email and Phone
- To update information individually, go to [Admin PL Students](#) [3] > Search by student netid > Click "Edit" to update

Setup and Configuration

Import Student-Personal spreadsheet

- At the beginning of each Fall, get a new update file. Prepare spread sheet with the following column name: NetID, Name, Class, Librarian, Email, Phone, where the Email is Librarian's Email.
- For Divinity, the columns are: netid, email, name, class, pl, where email is student's email.
- **Make sure no duplicate Netid (in spreadsheet, highlight Netid column, go to Home > Conditional Formatting > Highlight Cells Rules > Duplicate Values)
 - **Make sure no special characters (ó é è ã ö í ä á ñ Å ? ç ú ü Ö) in fields, use the formula { =IF(ISNUMBER(SEARCH(I\$1,\$A2)),"v","") } (where A is Name Column, I\$1 is one of the diacritic locate cell) to check. --- Don't need this after enable UTF-8 support enable.
 - **When do copy and Paste, make sure no blank space before or after "Name, Email" fields
 - **Make sure using the name in name field for Personal Librarians (in Drupal Profile - Refer to the PL name list at /pl home page)
- Open the spreadsheet (the one to be upload) and save as *.csv file (Click OK if has multiple sheets in file, then click No to not save the file format, click cancel to not save, the first step already create a *.csv)
- Structure > Feeds importer > PL Students Upload (or Divinity Student PL) >
 - Make sure at Node processor > Settings => check the followings, and **"SAVE"** the change.
 - Insert new nodes
 - Replace existing nodes
 - Delete non-existent nodes
 - * When just want to do part of the update, just save part of that data, change above "Delete non-existing nodes" to "Skip non-existent node"
 - Back to "Feeds importers" (Click the link on top in breadcrumbs)

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- Click "import" link at top of the text
- Select "PL Students Upload"
- Click "Choose File", browse to saved *.csv File
- Click > "Import"

Revise Personal Librarian Program Home Page

Remove PL

To remove PL, just unpublished that PL's PL page or delete it.

References

- Drupal: [How to change stacking order for mobile layouts](#) [4]
- [Personal Librarian Help](#) [2]

Source URL: <https://web.library.yale.edu/lit/sr/pl>

Links

[1] <https://web.library.yale.edu/users> [2] <https://web.library.yale.edu/pl/help> [3] <https://web.library.yale.edu/admin/pl-student> [4] <https://www.drupal.org/node/1343798>