

[TITLE SLIDE]

Alma has additional levels of structure than Voyager, and it provides additional frameworks for your library to handle “fulfillment” aka the circulation and resource sharing permissions for patrons.

I’ll briefly describe three of these new constructs, and provide links to more information about them. We’ll also look at where you’ll see questions about them on the Configuration form.

[SLIDE 2]

- These three constructs are:
 - Campus
 - Reading Rooms
 - And Remote Storage

We’re taking the time to talk about these to hopefully help avoid confusion when you review the Configuration Form.

- However, few I-Share libraries will choose to use the Campus functionality.
- Even fewer (perhaps only one or two) will use Remote Storage.
- I can’t predict how many may be interested in using Reading Rooms, either to set up using the Configuration form, or, afterward directly in Alma.

Another reminder here that the settings you enter in the Configuration form can be edited in Alma, and you’ll have time to test workflows during the test period before go-live. You’ve got time to think about these three. No need to rush into adding them.

[CAMPUS SLIDE 1]

We’ll start first with Alma’s infrastructure of “Campus”.

With your migration form, you worked out the difference between the Alma Institution and your Alma Library or Libraries. A Campus fits between Institution and Library; as an Alma Campus is a group of Libraries.

I can start here by saying that if your institution only has one Alma Library, you do not need to set up any Alma Campuses.

Even without a campus, all of the benefits that a campus provides can also be configured at the individual library level.

[CAMPUS SLIDE 2]

So if you have multiple libraries, there are some scenarios where a Campus might be valuable for you.

- A campus can be used to manage:
 - Inventory Control such as
 - Limiting the availability of electronic resources to specific campuses
 - Externally exposing the catalog (via Z39.50) sliced by campus level ownership of inventory
 - Prioritize the order of physical resources in Primo VE based on the resources location, and the physical location from where the patron is searching.
 - For Fulfillment:
 - Limiting allowed patron pick-up locations for requested resources by campus
 - Grouping lists of pick-up locations by campus
 - Limiting and controlling the availability of other services based on campus-level considerations

Some of the campus functionality is based on IP address.

- One motivation for defining a campus could be to represent an IP range which encompasses more than the IP addresses of the individual libraries on the campus, or to provide off-campus patrons with access to electronic resources across all of the libraries that make up the campus.

- But as I've mentioned, since IP addresses can also be defined at the library level, libraries that are not part of a campus can also benefit from the IP recognition settings.

Now, if you have multiple libraries and you're beginning to think you may want to use campuses- the next thing to ask is: do you have multiple libraries to put together into the same set; a campus is a GROUP of libraries.

[CAMPUS Example slide 1]

So for a first example, if you have one library in Illinois, and one other library in another state, you do not need to use Alma campuses. You can configure those inventory control and fulfillment options at the library level without adding campuses.

[CAMPUS Example slide 2]

For another example, if you have a single main library, and more than one medical school library, and those medical school library patrons have access to some databases that the main library patron do not, you can set up a campus for your Medical School Libraries. Your single Main Library does not also need to belong to a campus. If you want to take advantage of any of the inventory control or fulfillment option for the main library, that can be done with the Main Library's IP addresses, without adding a campus for it. It is okay for some libraries to belong to a campus, and some to not, at the same institution.

[CAMPUS Example slide 3]

For a third example, if you have a single main library, and more than one medical school library, but there are no inventory control or fulfillment reasons for why they need to be grouped together into a campus, then you do not need to set up a campus.

If you think your institution might be interested in adding a campus to your Alma structure, please send an email to CARLI Support. We can help you to determine whether a campus would help you to achieve your structural goals.

Campuses can also be added and edited in Alma later; they do not need to be added now. So don't rush to make your decision by the 18th if you need more time to think about it.

[CAMPUS SLIDE 4]

When you look at the Configuration Form, you'll find campuses mentioned on the Libraries tab, under the "Campus Definitions" section.

If adding campuses, you decide on a Code and Name for the campus, and then enter all of the IP addresses for the libraries that comprise that campus.

Then below in the Libraries section, you'd pair the library to the appropriate campus in the Campus column.

If you only have one library, or do not otherwise need campuses, leave both the Campus Definitions, and the Campus column blank.

Any questions about campuses?

[Reading Rooms SLIDE 1]

Reading Rooms

The next structure we'll discuss is the Reading Room concept.

Alma's Reading Room functionality allows libraries to have a hold shelf for non-circulating materials and to "in house" check-out any in-library-use items in that library.

From what I've read about Reading Rooms, they are not the solution you'd want for a Reference collection, which is typically available to patrons on open stacks. Reading Room functionality is more useful for special collections.

A reading room requires a separate circulation desk that can only circulate materials for locations designated as being a part of the reading room. If a circulation desk is defined as a "Reading Room Desk", it is dedicated for the reading room and can only perform reading room functionality. It is not possible to perform both regular circulation transactions AND reading room transactions from the same Alma circulation desk.

[READING ROOM SLIDE 2]

The request and loan process for reading rooms can keep track of in-library use materials coming and going from the hold shelf. The types of materials you might want to circulate using a reading room could include in-library-use only ILL materials, special collections materials, or bound journal that are kept in off-site storage but remain in-library-use only after being requested.

Terms of Use policies can define that items of a certain type (by location, material type, item policy etc.) are only available for loan in an Alma Reading Room.

A little information about the workflow with reading rooms:

- If a patron requests a Reading Room only-item in the OPAC, the item will be moved to the Reading Room, and will be made available to the patron in the Reading Room for a library-defined period.
- The item temporarily changes location to the Reading Room location, until the due date of the loan has passed, or until the patron indicates that they are finished using the item. The item is routed back to its permanent shelving location after staff scan in the item to return it.
- If an item that is on hold for Reading-Room-use is discharged in the library's regular Alma Circulation Desk, the circulation desk operator will be prompted to route the item to the Reading Room Desk for the hold.
- If library staff try to check out a Reading Room item to a patron while logged into the Main Circ Desk for the library, the loan will be blocked.

Depending on the volume of materials, and the physical set up, a library may determine that the Reading Room's hold shelf is the same location as the regular hold shelf at the library.

Or, the library might want to set up a Reading Room circulation desk for a separate physical space within the library such as a special collections room. Some institutions have also set up a separate Special Collections Library which might benefit from a Reading Room circulation desk.

[PAUSE]

For an example of a reading room use, a patron might ask for the "box of photographs and newspaper clippings on Homecoming 1987", and they'll need to use that box over a weeks' worth of research. They want to make sure that no other researcher also wants to use that box at the same time period as them.

With a reading room, there are two levels of check out/in:

1) an overall use check out/in, such as "patron has arrived to do research" check out/"I'm fully finished with this item so you can re-shelve it now" check in. When the patron no longer requires the resource, and the resource can therefore be returned to its permanent location; that is the Final Check In.

2) and a daily check out/in, such as "patron arrived at 10am today to review the materials" check out/"patron is done at noon and is going for lunch" check in, "patron is back at 2pm for continued use" check out /"patron is going home for the night but will be back tomorrow to continue researching" check in.

When the patron still requires the resource, the resource should therefore be stored on the reading room's hold shelf (for a library defined period of time). This is the Not Final check in.

[Reading Room SLIDE 3: CircDesk Tab Settings]

On the configuration form, you'll encounter the Reading Room settings on the Circ Desks tab.

In the "Reading Room Desk" column, if you want the circulation desk to function as a reading room, you'd enter a Y for yes.

Remember, a Reading Room desk cannot perform typical circulation transactions.

- If the Library where you want to set up "Reading Room" functionality also does regular circulation, you'll need to add two circulation desks- one for regular circulation, and one for reading room circulation.
- If the library only functions as a reading room, such as a special collections office, you can set up only a Reading Room circulation desk for that library.

[Reading Room Slide 4: Locations Tab Settings]

You will assign a circulation desk to each Alma Location on the Locations tab.

If you assign the location to a Reading Room circulation desk, those materials will circulate under reading room settings.

[Reading Room Slide 5: Policies TOU & RULES Tab]

Also on the Policies, TOU & Rules tab, you have the option to set up your circulation policies for location types, patron types, and or item type exception combinations to circulate only from a reading room.

For example, perhaps your library has bound periodicals in storage. If your Patron Type of Community can request the bound periodicals from storage, but they are not allowed to take them out of the library. However, your students and faculty patron types can both request them, AND check them out.

You could set the circulation permissions for the Community Patron type, with either the Location Type representing the Bound Periodicals, or, and Item Exception Type for the Serial Item type or a broader Item Exception Type for "InLibraryUse" materials, then set the "Circulatable?" Setting to limit it to the Reading Room.

Reading Rooms are not required and most I-Share libraries will not need or want to set them up at this time. Remember, since settings can be configured later in Alma, if you need more time to decide, you can add a Reading Room later.

Using Reading Rooms will be new workflows for our libraries as Voyager didn't have this type of functionality.

Take your time to decide whether a Reading Room fills a need at your library, and, whether using one would add enough benefit to balance the additional workflows.

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/080Configuring_Fulfillment/020Library](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/020Library)

Any questions about Reading Rooms?

[Remote Storage Slide 1]

Remote Storage

Finally, that third new structure available in Alma, is to designate that a location is a "Remote Storage" location.

Libraries may have remote storage facilities where some of their resources are stored. Patrons do not have direct physical access to these remote storage locations. Instead, a patron must place a request for an item that is in a remote storage facility. The requested item is then delivered to a location from which it can be picked up by the patron.

You define which remote storage facilities exist within the institution. When you add a physical location to a library, you can specify that the location is in a remote storage facility.

A library ONLY really needs to designate that a location is a remote storage location, if Alma needs to interface with remote storage retrieval software.

When a patron places a request for an item resource request on an item that belongs to a remote storage location, Alma automatically runs a job that exports the requested information to a defined FTP location. The remote storage system software then retrieves the file and processes it.

So, if library staff manually go and pull the material from the shelf from a pick list, that location does NOT need to be set up as a "Remote Storage" location in Alma.

If your library does use automated software for remote storage retrieval, and you'd like to synch the requests for material from that location in Alma to the software, you can designate the appropriate locations as Remote Storage locations.

[Remote Storage: Config Locations Tab, Remote Storage Table]

On the Configuration form Locations tab scroll to the very bottom and look for the Remote Storage Facilities table.

[Remote Storage: Locations Tab- Loc Table]

After filling out the remote storage facilities table, for each location in the Physical Location Details table above, select the correct remote storage location in the "Remote Storage Facility" column.

[Final Slide on Remote Storage]

Very few I-Share libraries will use a Remote Storage Facility. For those that do, there will be additional workflows and settings to configure later in Alma.

Any questions about remote storage facilities?