



Welcome!

Office Hours will start at 2pm and run until 3pm.

Please mute your microphone.

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed.

This session will be recorded and made available on the CARLI website both as PDF slides and as a recording, with live links to all referenced resources.



CARLI

INTRODUCTION TO THE ALMA CONFIGURATION FORM

August 29, 2019

Today's Topics

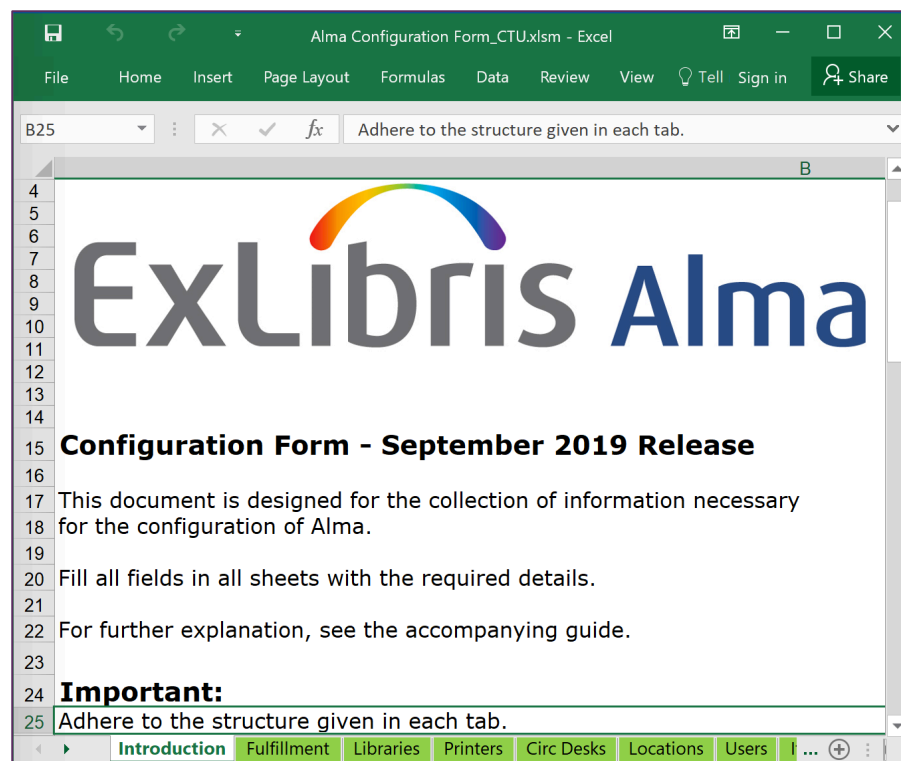
- What is it, and what does it do?
- DOs and DON'Ts: Configuration Form Etiquette
- Who at your library should be involved?
- Where to get help
- Timeline to receive and return the Configuration Form

What is the Alma Configuration Form?

- Main tool for the initial configuration of your library's Alma environment.
- Indicates your library's settings/preferences and CARLI I-Share consortial decisions.
- Good news! Configuration Form will be completed once. Future changes can be made directly in your Alma environment.
- Some Configuration settings will not be accessible to you until you have passed Alma Certification Training. If needed, Ex Libris staff or CARLI staff can make changes on your behalf.

Filling out the Configuration Form

- Not a typical Excel spreadsheet
- Protected cells
- Uses internal data validation by macros
- Delicate constitution
- Easy to cause data to be unusable



- DO complete the tabs in the order CARLI suggests.
Responses provided in one tab may populate other tabs.

1. General

2. Printers

3. Fulfillment

4. Libraries

5. Circ Desks

6. Locations

7. Users

8. Item Policies

9. Policies, TOU & Rules

Alma Configuration Form_CTU.xlsm - Excel

File Home Insert Page Layout Formulas Data Review View Tell me what you want to do... Sign in Share

E51 : X ✓ fx TRUE

	D	E	F	G
1	General			
2				
3	If your institution uses values different than the defaults provided below, update these as necessary. Note that in some cases, only specific values are valid.			
4				
5	General			
6	Parameter	Value	Notes	
7	force_location_selection_on_login	FALSE	Should "choose your current desk/department" popup on each login for users with roles at more than one desk/department? Display a resource from the Network Zone available for your	

Introduction Fulfillment Libraries Printers Circ Desks Locations Users Item Policies Policies, TOU & Rules Acquisitions Resource Management General Primo VE - Configu ...

These four tabs may be completed in any order or simultaneously with other tabs:

10. Acquisitions

11. Resource Management

12. Primo VE - Configuration

13. Primo VE - Digital Repository

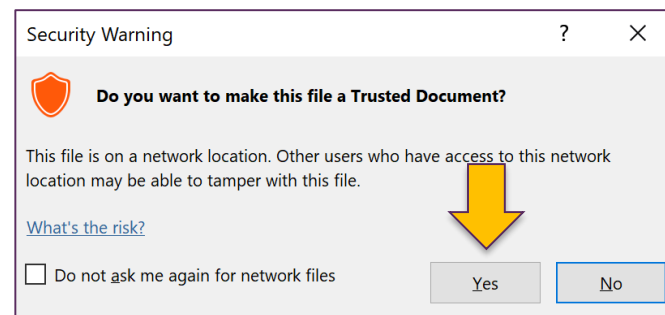
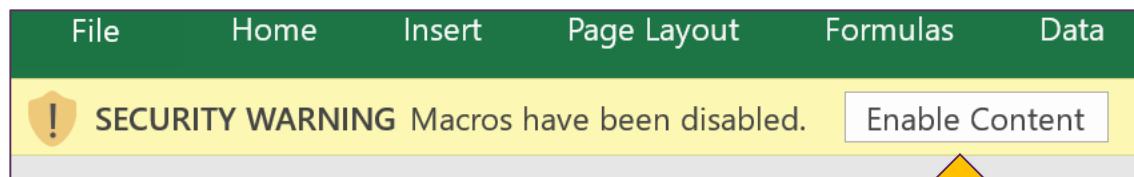
Acquisitions

Resource Management

Primo VE - Configuration

Primo VE - Digital Repository

- DO consult with others at your library to make local decisions.
- DO follow CARLI requirements, and consider CARLI recommendations.
- DO add new rows to the form only when necessary and only where the instructions say that it is ok to do so.
- DO run the Configuration Form Validation function.
- DO Enable Macros whenever you open the Form.



Not your typical Excel Spreadsheet...

- **DON'T** Disable Macros when you open the Form.
- **DON'T** alter the structure in any way.
- **DON'T** hide columns or rows.
- **DON'T** add new columns.
- **DON'T** move tabs around.
- **DON'T** change colors, fonts, or sizes. Zoom ok.
- **DON'T** copy and paste from other Excel files or other programs like Word. Plain text editor ok.
- **DON'T** change responses indicated as CARLI consortial requirements.



Who might need to be involved at your library to fill out the Alma Configuration Form?

- Covers wide range of topics
- Includes Discovery setup (that is, Primo VE)
- CARLI recommends that you consult with staff in your library who are responsible for the relevant areas when completing the Form.
- Remember, most local configuration choices made on this form can be changed during your Test Load review and after your library is live on Alma!

What documentation and help are available?

- CARLI Configuration Form Webpage
<https://www.carli.illinois.edu/products-services/i-share/alma/prepare-configform>
- CARLI-customized “Alma Configuration Form Guide”
- Short CARLI webinars on tricky topics (coming soon)
- Ex Libris Knowledge Center videos in the “Configuration During Implementation” section
https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Implementation_Tutorials/02_Configuration_During_Implementation

What is the timeline for receiving and returning the Configuration Form?

- CARLI staff will begin to deposit Forms into Box on Friday, August 30.
- I-Share Libraries must return their completed Configuration Form by uploading it to Box by **Wednesday, September 18, 2019 at 5pm.**



Questions? We all learn from Questions!

- CARLI staff are learning, too, so please be patient with us during this major change.
- Please send your questions to us through our support@carli.illinois.edu address.
- If your library simply *cannot* accomplish a task or meet a deadline, let us know as soon as possible *before* the deadline. We can help!
- Weekly Thursday afternoon Office Hours with CARLI and Ex Libris provide an opportunity for feedback and to learn from each other.



CARLI

CAMPUSES, READING ROOMS, AND
REMOTE STORAGE CONCEPTS

Alma's Additional Levels of Structure that You'll Encounter in the Configuration Form

- Campus(es)
- Reading Room
- Remote Storage

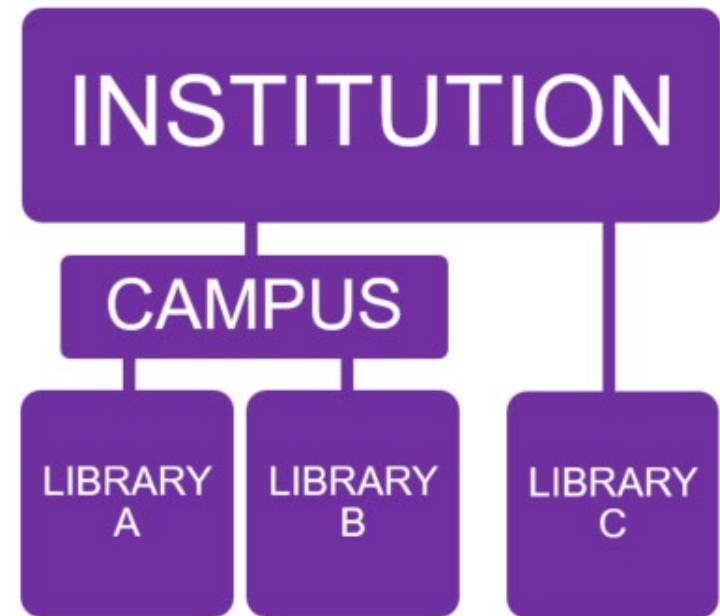
(Another reminder here that the settings you enter in the Configuration Form can be edited in Alma.

You'll have time to test workflows during the test period, before go-live.)



Campus

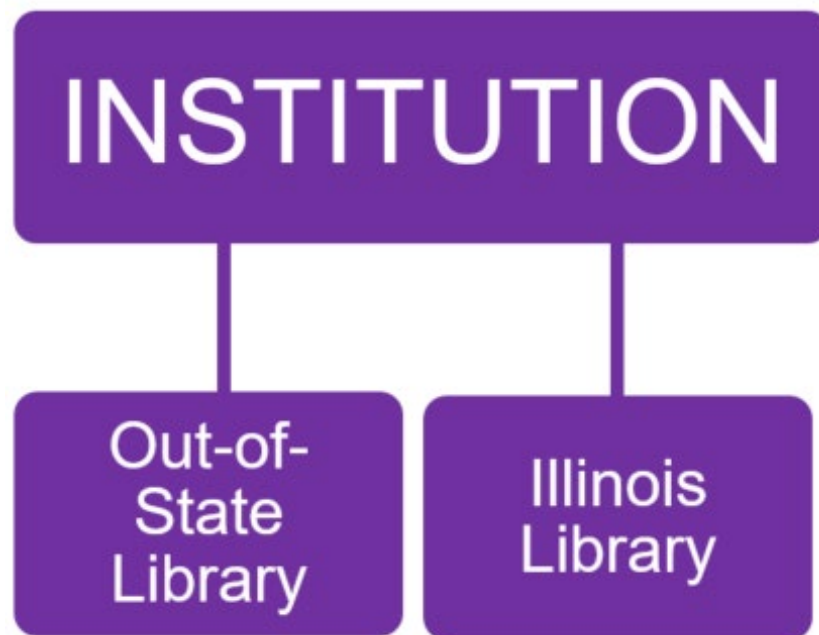
- Alma Campuses are libraries grouped together to manage certain inventory control and fulfillment settings for those libraries together as a group.
- The settings can also be configured for individual libraries.
- Ex Libris Alma Topology Documentation:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/010Getting_Started/030Alma_Topologies](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/010Getting_Started/030Alma_Topologies)



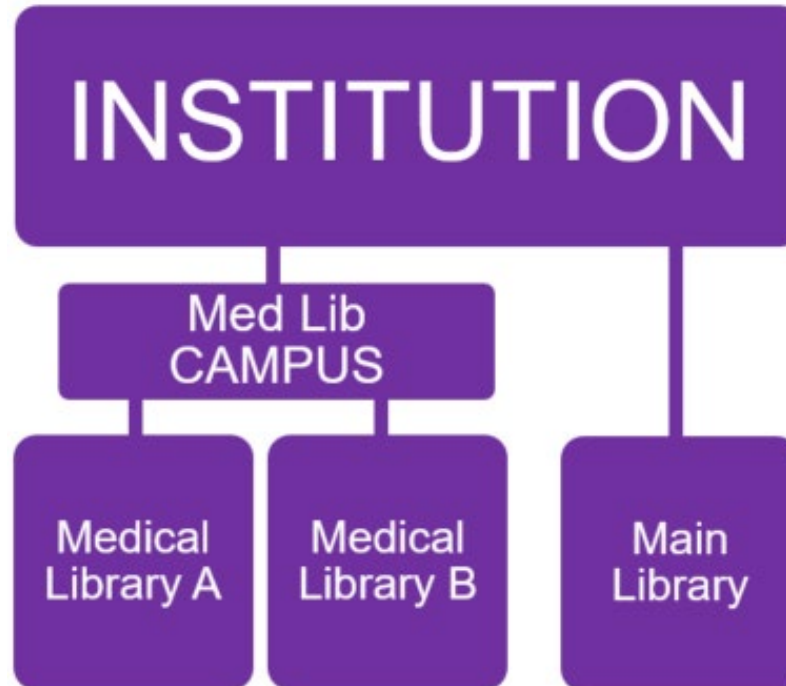
Campus

- 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 display order of physical resources in Primo VE, based on the resource's location and the physical location of where the patron is searching.
- Fulfillment, such as:
 - 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.

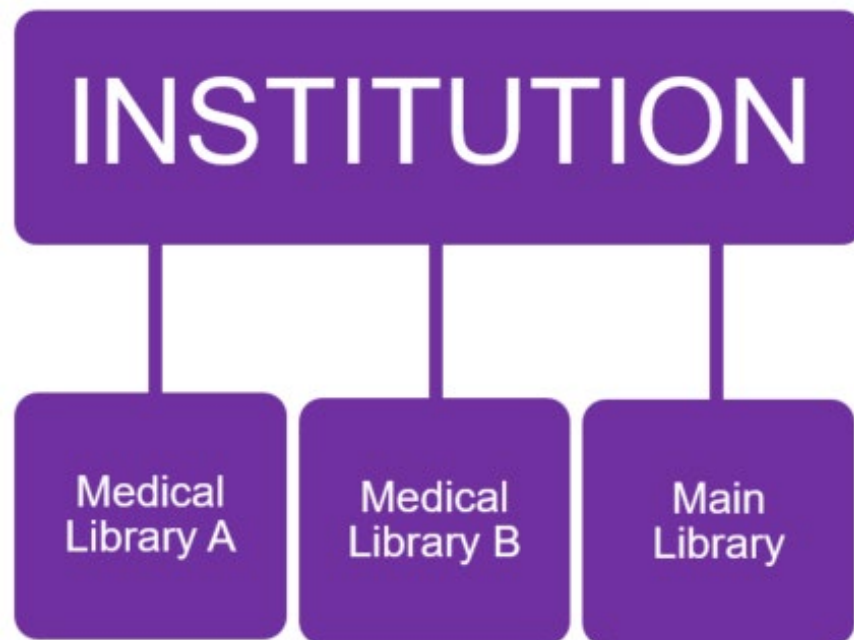
To Campus, or not to Campus: Example 1



To Campus, or not to Campus: Example 2



To Campus, or not to Campus: Example 3



Campus on Configuration Form: Libraries Tab

Copy of Alma Configuration Form_UIC.xlsm - Excel

File Home Insert Page Layout Formulas Data Review View Developer Acrobat Tell me... Campbell, Deborah M... Share

B33

	A	B	C	D
1	Libraries			
2				
3	You may insert additional rows into any of these tables if required.			
4				
5	Campus Definitions			
6				
7	Code of Campus	Name of Campus	IP Match Criteria	
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20	Note that any library address information from your legacy system is migrated to Alma. If you want to add an additional address for a library, you may do so here. Other			
21				
22	1. Libraries			
23	Code of Library	Campus	Name of physical Libraries	First Line of Address
24	DALEY		Richard J Daley Library	
25	LHSC		Library of the Health Sciences Chicago	
26	LHSP		Library of the Health Sciences Peoria	
27	LHSR		Library of the Health Sciences Rockford	
28	LHSU		Library of the Health Sciences Urbana	
29	WARE		Warehouse	
30				

Introduction Fulfillment **Libraries** Printers Circ Desks ...

Ready 100%

Configuration Form: Policies, TOU & Rules Tab

Copy of Alma Configuration Form_UIC.xlsm - Excel

File Home Insert Page Layout Formulas Data Review View Developer Acrobat Design Tell me... Campbell... Share

Clipboard Font Alignment Number Styles Cells Editing

SECURITY WARNING Macros have been disabled. Enable Content

AG13

	AE	AF	AG	AH	AI
6	Requestable?	Cancelled Recall Due Date	Pickup Locations	Hold Shelf Period	Digitizable?
7					
8					
9					
10	Column31	Column32	Column33	Column34	Column35
12	Requestable?	Cancelled Recall Due Date	Pickup Locations	Hold Shelf Period	Digitizable?
13					
14			In Library		
15			In Institution		
16			At Any Reading Room		
17			At Library Reading Room		
18			In Campus		
19			In Patron Affiliated Campus		
			At Any Institution		

Introduction Fulfillment Libraries Printers Circ Desks ...

Ready 100%

Reading Rooms

- Alma's Reading Room functionality allows libraries to have a hold shelf for "in house" use items in that library.
 - Dedicated Circulation Desk for Reading Room locations and Reading Room materials.
- Ex Libris Alma Reading Room PowerPoint:
https://knowledge.exlibrisgroup.com/@api/deki/files/49949/Fulfillment_-_Reading_Room_Functionality.pptx?revision=3

Reading Rooms

- Policies can define that certain items can only be checked out by a patron in an Alma Reading Room (so, in-house use only).
- Reading Room circulation has two levels of check out/in:
 - “Final Check In” aka overall use.
 - “Not Final Check In” aka resource still needed by patron.



Reading Rooms: Circ Desks Tab Settings

Copy of Alma Configuration Form_UIC.xlsm - Excel

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A9

1 Circulation Desks

2 A given Circulation Desk can serve locations in a given library only, although it may serve multiple locations within that library. Alma is

3 pre-configured with a default circulation desk for each library, to which all locations in that library are attached. Enter information below

4 only if you want to modify the default circulation desks, or if you want to add a new circulation desk. If there is only one circ desk per

5 library, the circ desk code should remain the "DEFAULT_CIRC_DESK". Circulation Desks configured here will populate the dropdown

6 menu in the 'Circulation Desk' column of the Locations tab. If you want to automatically print your pick slips to a different printer,

7 complete the Automatic (Pick Slip) Printing Rules table, below.

8

9

10

11

12

13

14

15

16

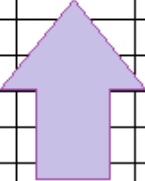
17

General Details								
Library Code	Circ Desk Code	Circ Desk Name	Primary	Pick from shelf	Reading room desk	Description	Printer Code	Cr
	DEFAULT_CIRC_DESK							
	DEFAULT_CIRC_DESK							
	DEFAULT_CIRC_DESK							
	DEFAULT_CIRC_DESK							
	DEFAULT_CIRC_DESK							

Ready

Libraries Printers **Circ Desks** Locations Users Item ...

100%




Reading Rooms: Locations Tab Settings

Copy of Alma Configuration Form_UIC.xlsm - Excel

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G8

Physical Location Details							Physical L
Library Code	Location Code	Name of Location	Location Type	External Name of Location	Numeric location code for RFID	Circulation Desk Code	Can I out fr
DALEY	UNASSIGNED	Records not wrapped in Location Sheet		Problem: See Library Staff			
DALEY	adm_off	Daley - Admin Office		Daley Library - Administrative Office/1st floor north			
DALEY	art	Daley - A&A		Daley Library - Book Stacks			
DALEY	xxx	XXX		XXX			
DALEY	art_per	ART PER		Daley Library - Periodicals/2nd floor south-Call Number Area			
DALEY	aud	Daley - Reserve Audio		Daley Library - Circulation/1st floor - Audio			
DALEY	auvl	Daley - Reserve Video		Daley Library - Circulation/1st floor - Video			
DALEY	acq	Acq. Dept. Head		Acq			
DALEY	chgo_stor	Chicago Coll. - Storage		Chicago Collection - Storage			
LHSC	chs	CHS Stacks		LHSC Chicago 3rd Floor Book Stacks			
LHSC	xxx	XXX		XXX			
LHSC	chs_av	CHS Audiovisuals		Collection unavailable for use			
LHSC	chs_avlock	CHS Media Locked Shelves		LHSC Chicago media - ask at Circulation Desk			
LHSC	chs_avopen	CHS Media Open Shelves		LHSC Chicago media collection (2nd floor)			



Reading Rooms: Policies, TOU & Rules Tab

Copy of Alma Configuration Form_UIC.xlsm - Excel

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D14 In Reading Room Only

	A	B	C	D	E	F
1						
2	Please enter your policies below					
3	1. Institutional Default Values					
4	Column1	Column2	Column3	Column4	Column5	Column6
6				Circulatable?	Recallable?	Loan Length
7						
8						
9	2. Institutional Policies & TOU					
10	Column1	Column2	Column3	Column4	Column5	Column6
12	Location Type	Patron Type	Item Exception Type	Circulatable?	Recallable?	Loan Length
13	OffSiteStorage	Community		In Reading Room Only		
14		Community	Periodicals	In Reading Room Only		
15						
16						
17						
18						
19						
20						

Ready

Locations Users Item Policies Policies, TOU & Rules

100%

Remote Storage

- Libraries may have remote storage facilities where some of their resources are stored.
 - Patrons must place a request for an item that is in the 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.
 - If library staff manually retrieve material from the shelf from a pick list, that location does **NOT** need to be set up as a "Remote Storage" location in Alma.

Remote Storage: Locations Tab, Remote Storage Facilities

The screenshot shows an Excel spreadsheet with the following content:

	A	B	C	D	E
241					
242	Remote Storage Facilities				
243	Enter code and name of any remote storage facilities that you have and please note whether these require an interface to an external system for hold request management				
244					
245	Remote Storage Code	Remote Storage Name	Priority	Transit Scheme	Handles digitization requests locally
246					
247					
248					
249					
250					
251					
252					
253					
254					
255					
256					
257					
258					

The spreadsheet interface includes a ribbon with tabs: File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Acrobat, Tell me..., Campbell, Deborah M..., and Share. The bottom navigation bar shows tabs for Locations, Users, Item Policies, and Policies, TOU & Rules. The status bar at the bottom indicates 'Ready' and '100%' zoom.

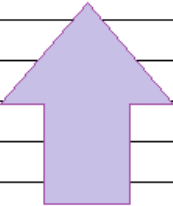
Remote Storage: Locations Tab, Location Table

Copy of Alma Configuration Form_UIC.xlsm - Excel

Tell me what you want to do...

Campbell, Deborah Marie

	F	G	H	I	J	K	
Physical Location Circulation Desk Details							
Name of Location	Numeric location code for RFID	Circulation Desk Code	Can Items be checked-out from this circ desk?	Can Items be returned at this circ desk?	Can Items be reshelved by this circ desk?	Remote Storage Facility	Default
Library Staff Administrative North							
Book Stacks							
Periodicals and Number Area Circulation 1st							
Circulation 1st							
ion - Storage of 1000 Book							
Available for use Media - ask at K Media Collection							
Media - Cataloging (ies) Media - ask at K Circulation							
Dictionary							



Remote Storage

- Ex Libris Remote Storage Presentation:
https://knowledge.exlibrisgroup.com/@api/deki/files/68770/Fulfillment_-_Remote_Storage.pptx?revision=1
- Configuring Remote Storage Facilities:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/080Configuring_Fulfillment/040Configuring_Remote_Storage_Facilities](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/040Configuring_Remote_Storage_Facilities)
- Closed Storage, ASRS:
https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Fulfillment/Request_Management#Closed_Storage.2C_ASRS

Thank you!

Join us next Thursday
at 2pm for another
Office Hour



You can always contact CARLI at support@carli.illinois.edu