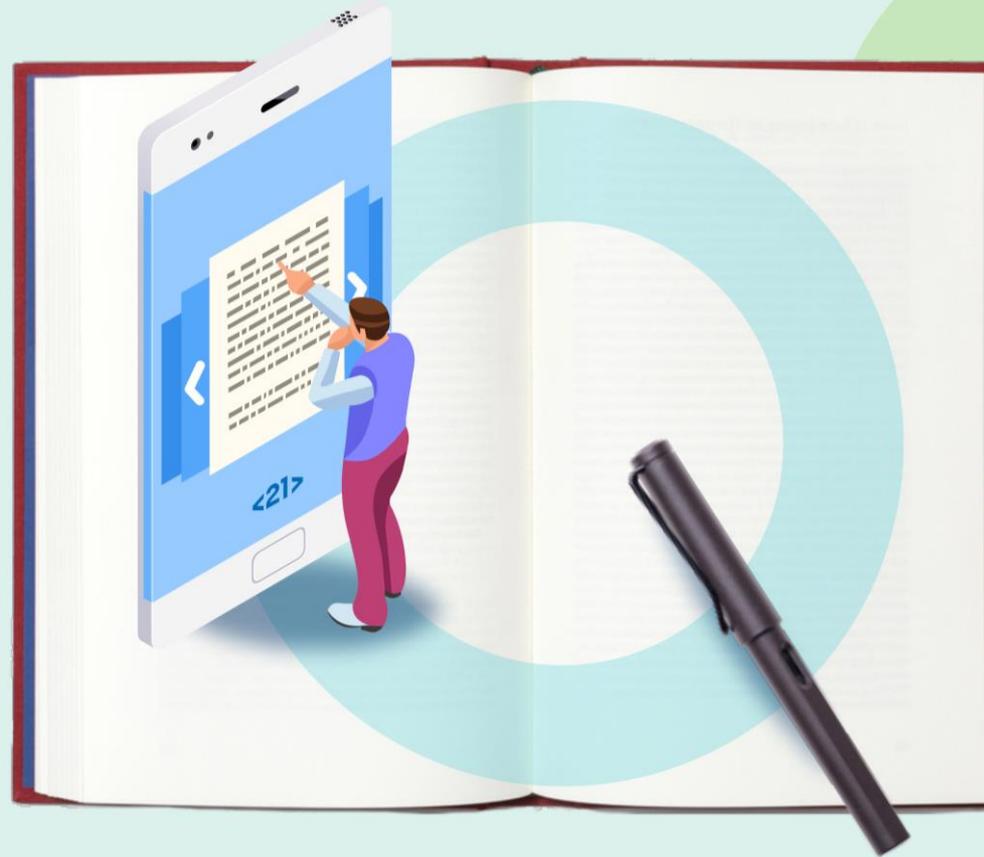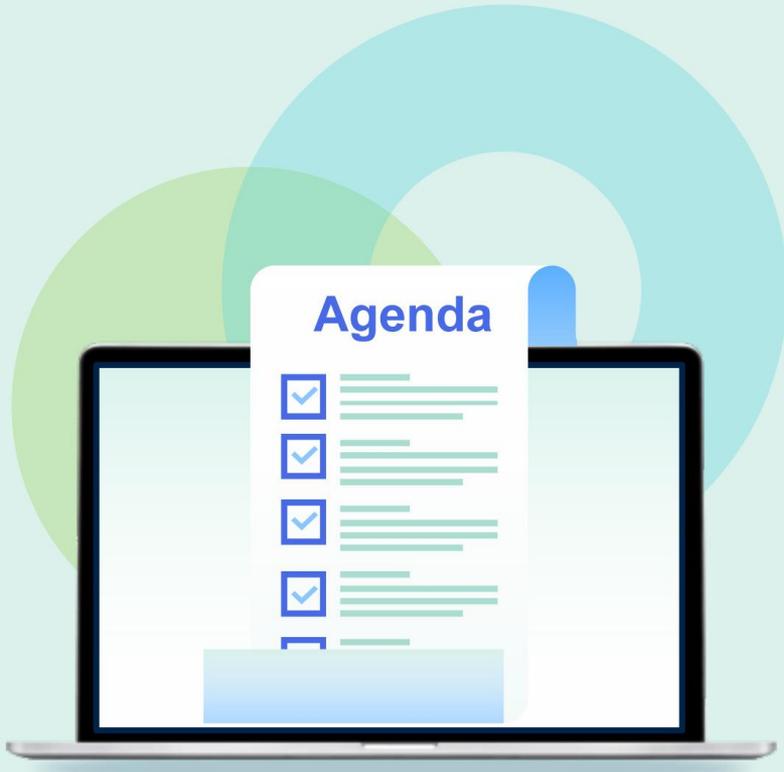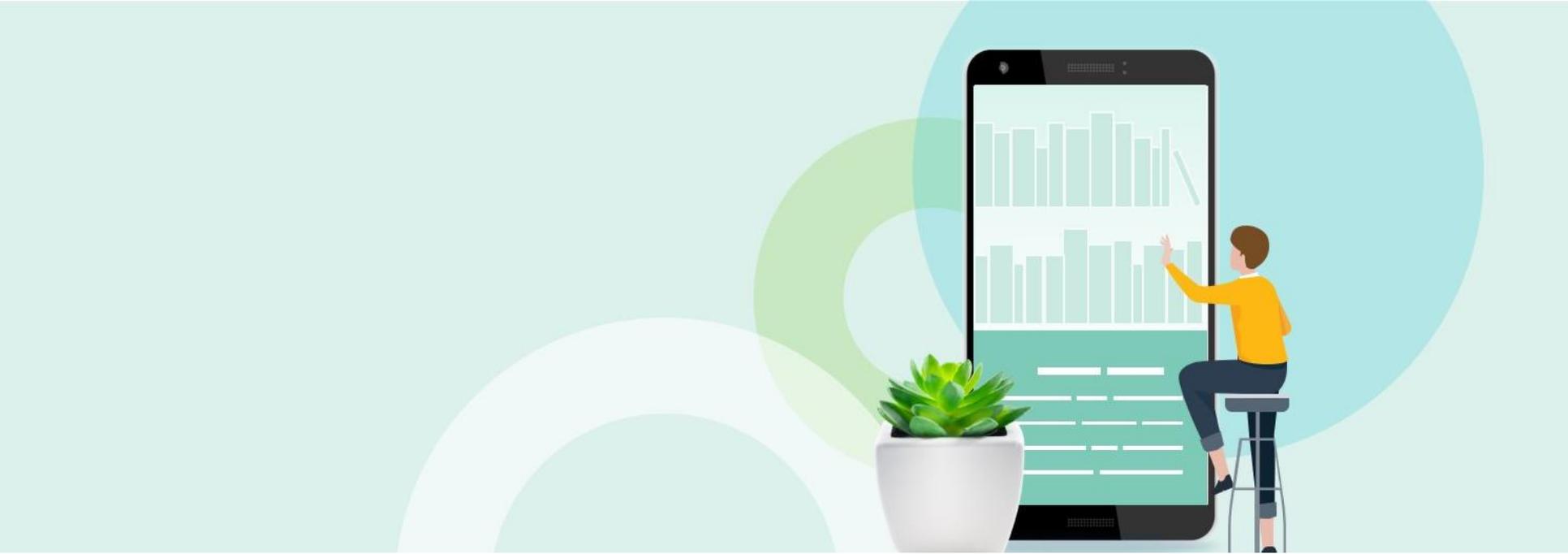# Alma Calendar Management

CARLI

Miiya Holmes-Implementation Consultant

- Calendar Management Overview
- How to Add Calendar Events and Exceptions
- Calendar Management Best Practices
- Additional Resources

Calendar Management Overview

Calendar Management Overview

- What are calendars in Alma?

- Who can manage institution and library Calendars?

- Where are calendars located in Alma?

- When does calendar management need to take place?

- How to manage Calendars in Alma?

What are calendars in Alma?

- Calendars define open and closed hours for institutions and their libraries.

- These hours are used in many fulfillment policies and terms of use such as:

  - Closed Library Due Date Management

  - Due Dates

  - Hold Shelf Period

Remember due dates do not have to match the actual hours at which the library is physically open or closed. For example, you can configure the library closing time (as far as loans are concerned) in Alma to be 6:00 PM even if the library physically closes later in the evening.
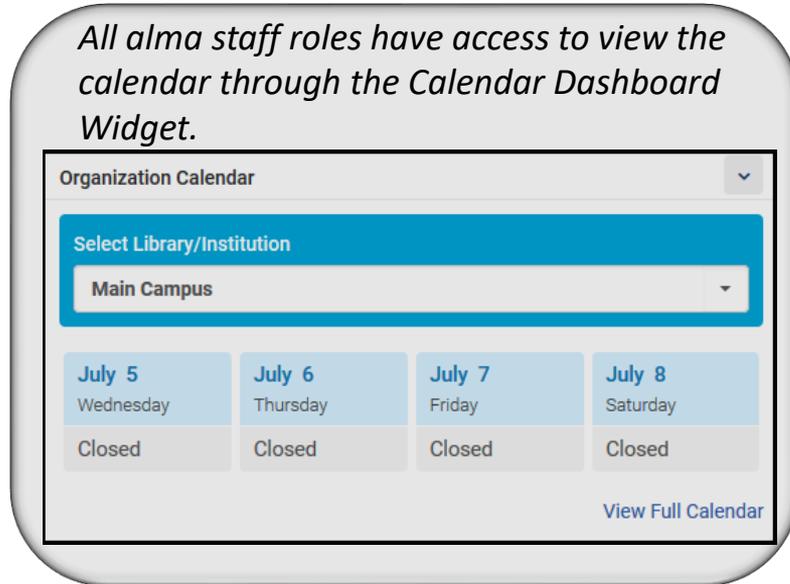
Who can manage institution and library Calendars?

To configure calendar information for an institution or library, you must have one of the following roles:

- General System Administrator (institution and library level)
- Fulfillment Administrator (library only)

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Where are calendars located in Alma?

All alma staff roles have access to view the calendar through the Calendar Dashboard Widget.

Organization Calendar

Select Library/Institution

Main Campus

July 5 Wednesday	July 6 Thursday	July 7 Friday	July 8 Saturday
Closed	Closed	Closed	Closed

View Full Calendar

Institution Calendars are configured here:

Configuration Menu > General > Libraries > Add a Library or Edit Library Information > Calendar Management

Configuration Menu > Fulfillment > Libraries Management > Open Hours

Library level Calendars are configured here:

Configuration Menu > Select Library to configure in the "Configuring" drop down menu > Fulfillment > Library Management > Open Hours

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When does calendar management need to take place?

- Anytime you have an exception to your standard opening hours that may affect fulfillment policies and TOUs:

    - Extended hours during finals weeks

    - Limited hours during holiday breaks

    - Summer hours if different than fall or spring standard hours

    - End of Term or Year

    - Closing due to extenuating circumstances (bad weather, etc.)

How to manage Calendars in Alma?

1. Create a list of events and exceptions that may affect fulfillment in Alma, including the date of the occurrence and if it needs to be reoccurring

2. Decide if the events and exceptions should be at the institution or library level by communicating with stakeholders at both levels.

3. Add the records to the appropriate calendar

   1. Add Record

   2. Apply Changes (to run the job)

   3. Full Calendar to review changes (library level)

   4. Save

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Adding Calendar Events and Exceptions

Events vs. Exceptions

Events	Exceptions
• Special dates, such as the end of the year, the end of the semester, or exhibition • Do not indicate if a library is open or closed • Can be set to reoccur weekly or yearly • Used in Due date policy when the Fixed variable type is selected	• Indicate when the library hours differ from standard hours • Affect closed library due date policy • Affect due date calculations • Affect overdue fine calculations • Affect recall overdue fine calculations

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Configuring Summer Hours Example

✓ Create a list of events and exceptions that may affect fulfillment in Alma, including the date of the occurrence and if it needs to be reoccurring
✓ Decide if the events and exceptions should be at the institution or library level by communicating with stakeholders at both levels.

3. Add the records to the appropriate calendar
    1. Add Record
    2. Apply Changes
    3. Full Calendar to review changes (library level)
    4. Save

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Exception Scenario at Library Level

Current Standard Hours = Open 24 hours everyday

Summer Hours = Open 8am to 9 pm

This will require 2 closing exceptions to be configured. One for the time period the library will be closed in the morning and one for the time period the library will be closed at night.

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Add Record

Sets the period the library is closed in the morning

Record type *	Exception ▾
Status *	Closed ▾
Day of week	▾
Description	Closed Early Summer Mornings
Valid from *	06/01/2020 ✕ 📅
Valid to *	08/14/2020 ✕ 📅
From hour (HH:mm)	00:00
To hour (HH:mm)	08:00

Add   Close   **Add and Close**

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Sets the period the library is closed in the evenings

Add Record

Record type *	Exception ▾
Status *	Closed ▾
Day of week	▾
Description	Closed early mornings in Summer
Valid from *	06/01/2020 ✕ 📅
Valid to *	08/14/2020 ✕ 📅
From hour (HH:mm)	21:00
To hour (HH:mm)	23:59

Add   Close   **Add and Close**

Event Scenario at Institution Level

You want to set loan due dates from stacks materials for staff to be the end of the summer term.

Add Record

Record type *	Event ▾
Recurrence	☐
Fixed date description *	End of Summer 2020
Date *	08/14/2020 ✕ 📅
Hour (HH:mm)	

Add   Close   **Add and Close**

Calendar Management Best Practices

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Calendar Best Practices

- Create a calendar for each library within the institution (standard opening hours do not inherit down from the institution level)
- Have a list ready of holidays when the library will be closed. Only set institution level exceptions and events when all libraries will definitely be affected by the same occurrence. This will prevent the need to delete the institution level one and add library level ones later.
- Cleanup expired exceptions
- Use the Import Tool for large batches of updates
- If a library has already defined standard hours for a particular day to be closed (e.g. Sunday: Standard Hours = Open 00:00-23:00) do not add additional "Closed" exceptions for that day – this causes errors in the whole schedule. You can, though, add "Open" hour exceptions if the library needs to be open on a particular date.

Additional Resources

- [Configuring Institution/Library Open Hours](#)

- [Alma Calendar FAQ](#)

- [Calendar Management Steps to Add Exceptions to Standard Opening Hours](#)

Thank you!

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