



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
I-Share

LIBRARY POLICIES:

PREPARING FOR THE ALMA CONFIGURATION FORM

Past – Present – Near Future

- Past:
 - Library has submitted files for the Migration Form, P2E, and Link Resolver Migration.
- Present:
 - CARLI Office staff double-checking data, and formatting Migration Form for submission to Ex Libris.
- Near Future:
 - Ex Libris will do final validation on Migration Forms, and use them to generate Configuration Forms.
 - CARLI Office will notify libraries when Configuration Form is available.



During next week's open office hours call, we'll have a discussion of the circulation/resource sharing (aka fulfillment) settings that your library will enter as part of the test load configurations.

Examples to think about:

- Does your library have a public webpage where you've listed your policies? What details does that page contain?
- What do you explain to your patrons for which loan period to expect, which items can be renewed, and which can be requested?
- What do you explain if and when they will receive overdue or lost fines, if they have a grace period?
- Which of your library's local patron groups have similar permissions?
- Which of your library's local patron groups have vastly different permissions?

Background: Voyager

The screenshot shows the 'Circulation - Policy Definitions' window in Voyager System Administration. The left sidebar contains navigation options: Acquisitions, Call Slips, Cataloging, Circulation, Patron Group Mapping, Patron Note Types, Patron Default Dates, Policy Definitions, Request Configuration, OPAC Configuration, Search, Security, System, and Web Services. The main area is titled 'Circulation - Policy Definitions' and shows a list of names with 'Circulation Desk' selected. Below this is the 'Edit Policy Definition' section with tabs for Policy Definition, Locations, Policies, Calendar, Patrons, Items, Matrix, and Short Loan Matrix. The 'Matrix' tab is active, displaying a table of Patron Group / Item Type pairs. The table lists 'FACULTY' for various item types: AVRE, Book1, BookN, BookRE, Error, LeisureBook, Micro1, Other1, Recording1, RecordingRE, Reserve1, Reserve2, Reserve3, and Reserve4. Action buttons like Add..., Modify..., Remove, Copy, Select All, and Unselect All are visible. At the bottom are Save and Cancel buttons.

Patron Group /	Item Type
FACULTY	AVRE
FACULTY	Book1
FACULTY	BookN
FACULTY	BookRE
FACULTY	Error
FACULTY	LeisureBook
FACULTY	Micro1
FACULTY	Other1
FACULTY	Recording1
FACULTY	RecordingRE
FACULTY	Reserve1
FACULTY	Reserve2
FACULTY	Reserve3
FACULTY	Reserve4

The screenshot shows the 'Circulation Policy Matrix Record Settings' dialog box. It has two tabs: Settings and Intervals. The Settings tab is active. At the top, 'Patron Group' is set to 'FACULTY' and 'Item Type' is 'Book1'. Below are various settings with checkboxes and input fields:

- Charge/Renew
- Recall
- Hold
- Call Slip
- UB
- Loan Period: 112 Days
- Renewal Period: 112 Days
- Max # of Sequential Renewals: 3
- Fine Interval: Day
- Fine Rate: \$0.00
- Max Fine Amount: \$0.00
- Max Fine for Recalls: \$0.00
- Min Loan Period for Recalled Items: 56 Days
- Recall Fine Interval: Day
- Recall Fine Rate: \$0.00
- Grace Period: 14 Days
- Recall Return Interval: 0
- Recall Grace Period: 0
- Max Items Borrowed for this Patron Group & Item Type
- Renew From: Original Due Date Renewal Date

At the bottom are Save and Cancel buttons.

Background: Alma

Fulfillment Unit Details | **Fulfillment Unit Locations** | Fulfillment Unit Rules

1 - 11 of 11 | Code

[Attach existing location](#)

Physical Location Type :

	Code	Library Name	Location Type	Name	
1	offsite	Main Library	Remote Storage	Building 9	<input type="button" value="..."/>
2	govdocs	Main Library	Open	Government Documents	<input type="button" value="..."/>
3	internat	Main Library	Open	International Collection	<input type="button" value="..."/>
4	edu-juv	Main Library	Open	Juvenile Education Collection	<input type="button" value="..."/>
5	MEDIA	Main Library	Open	Media Collection	<input type="button" value="..."/>
6	SCILOWER	Science Library	Open	Science Lower Level	<input type="button" value="..."/>
7	biology	Science Library	Open	Science Stacks	<input type="button" value="..."/>
8	grad	Graduate Library	Open	Stacks	<input type="button" value="..."/>
9	main	Main Library	Open	Stacks	<input type="button" value="..."/>

Configuration Form

- The three sets of policy groupings for the Configuration Form are:
 - Patron group types
 - Location types
 - And Item types

The screenshot shows an Excel spreadsheet with the following content:

	B	C
1	Fulfillment Tables	
2	Select one of the suggested values from the drop down list or insert a required value manually.	
3	Location Types (Fulfilment unit)	On Shelf Request Policy
4		Request for pickup anywhere regardless of availability
5		No Requesting from available holding
6		Request for pickup anywhere regardless of availability
7		Request for pickup in different library only
8		Request for pickup anywhere regardless of availability
9		
10	Patron Types	
11		
12		
13		
14		
15		
16		
17	Item Exception Types	
18		
19		
20		
21		
22		
23		
24		

Ex Libris Links for Further Study

- [Alma Configuration Form Main Page](#)
 - [Alma Configuration Form Guide](#)
 - [Alma Configuration Form Example](#)
 - [Alma Configuration Tutorial: 01 Introduction](#)
 - [Alma Configuration Tutorial: 02 Fulfillment Configuration](#)
 - [Alma Configuration Tutorial: 04 Fulfillment Tab Configuration](#)
- [Alma Admin Certification: Fulfillment Units](#)
- [Alma Admin Certification: Terms of Use and Policies](#)

- Alma Sandboxes

Thank you!

Join us next Thursday at
2pm for another Office Hour

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

