



CARLI *Lab*

Reports

Adding a New Library in Alma

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The Original CSI in Alma

- Location in Booth Library
- Shared an Alma Circ Desk
- Shared Hours

- Has fines
- Has non-standard overdue days until item lost

Initial Challenges...

- Created bib records and added inventory for various collections of technology equipment
- Some items have many “pieces”
- Records based on models created pre-Alma

Example:

LDR	00255nam a2200085 u 4500
001	9917543027005833
005	20210303102502.0
008	201125s2013 xx r 000 0 eng d
245	10 a Snowball microphone collection. For questions or renewal, call 217 581-6061.
246	3_ a Snowball microphones

Item Record

General ENUM/CHRON **Notes** History

Functional Notes

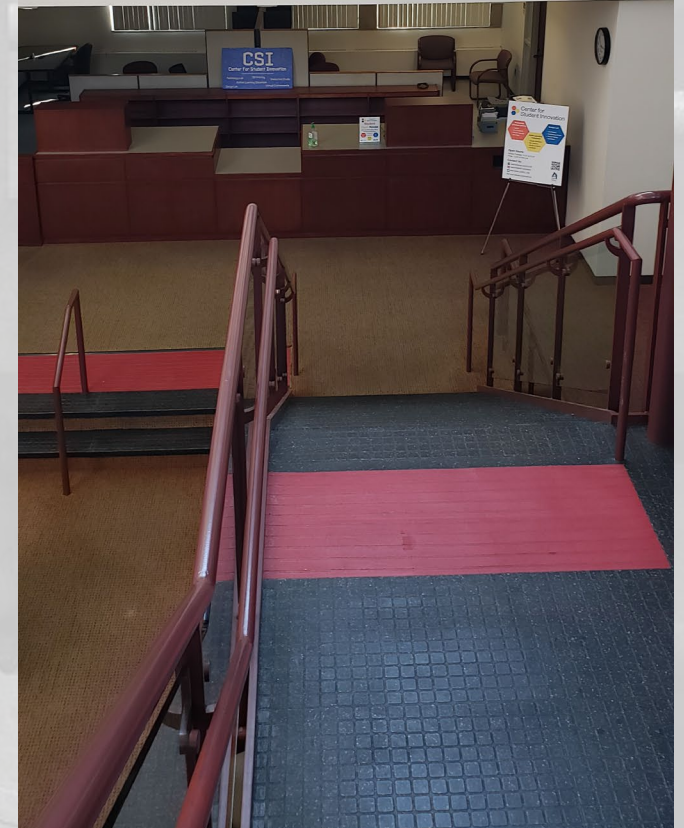
Public note	-
Fulfillment note	Account for one Singer sewing machine in case with additional items. Check contents against inventory list. Item consists of 35 items (sewing machine + case with 33 additional items)

Internal Notes

Internal note 1	-
Internal note 2	Check contents against checkout card inventory list

Splitting off the CSI

- CSI desk is closed Saturdays
 - Needed due dates to adjust for closed dates
- Separate Circ Desk and Roles



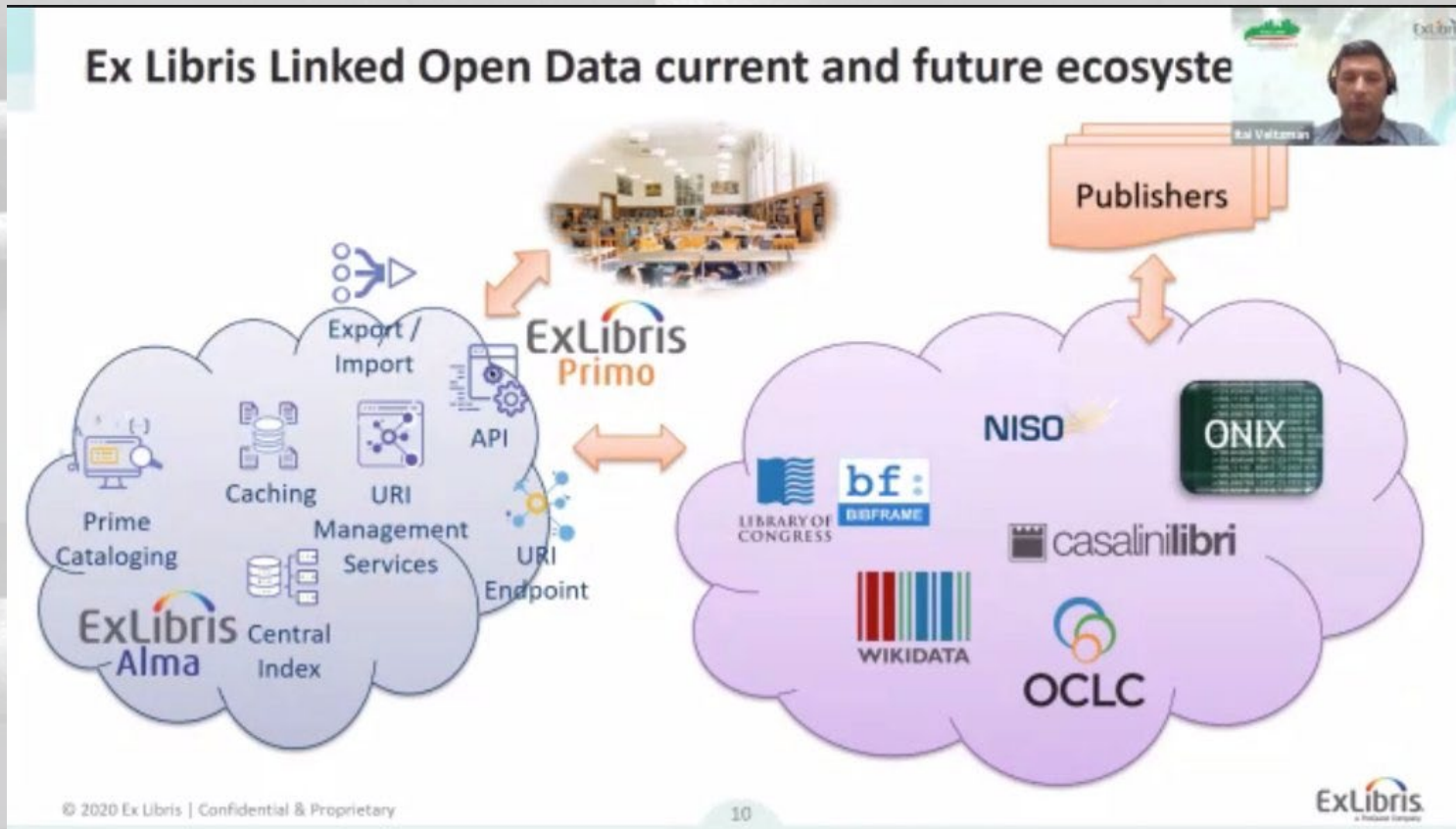
“Building” the New Library

- Thank you Debbie!
- Tasks –
 - Create Library
 - Set Relationships to Institution and Other Library
 - Set hours
 - Create Circ Desk
 - Set User Roles
 - Create Location
 - Assign Rules
 - Moving CSI inventory
- Update reports with new location

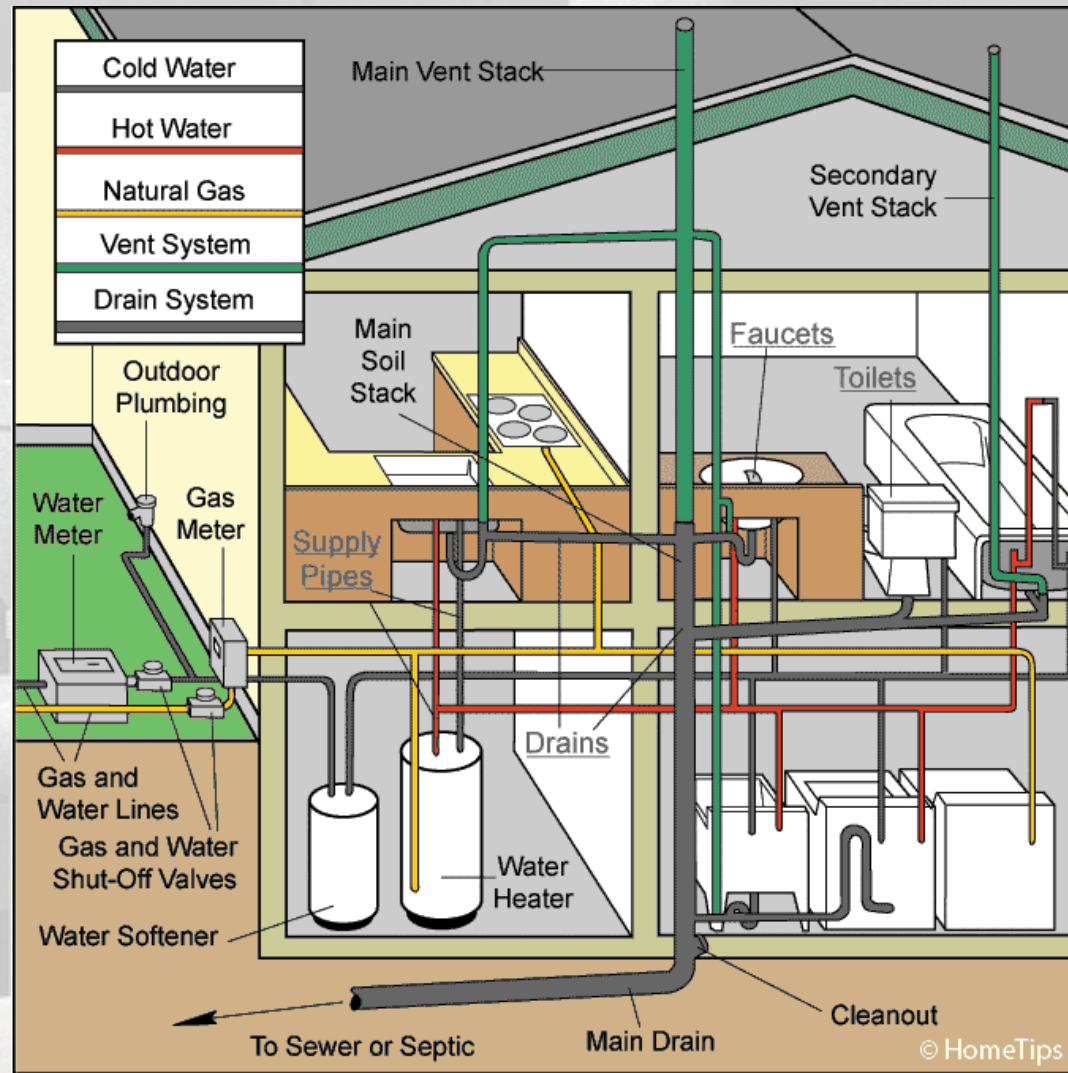
Sysadmin Rule 1:

If you can't *confidently* visualize data flows into and out of the system, do *not* make changes.

Visualizing Alma, the Wrong Way



Alma as Plumbing – A Metaphor



- Stuff flows in
- Stuff is modified
- Stuff flows out
- So many possible failure points
- Functional failure is possible – broke but works

Warning Signs and What Broke

- Reports didn't match Overdue and Lost Job report
- Nothing was going overdue
- No fines accruing
- Overdue and Lost profiles tied to old location. Did not run



Fulfillment Cleanup

- Find Lost
 - Checkout date > 42 days ago
 - "Due Date"."Due Date" <= TIMESTAMPADD(SQL_TSI_DAY, -42, CURRENT_DATE)
- Find Overdue with 2 Day's Grace
 - "Return Date"."Return Date" - "Due Date"."Due Date" >2
- Run variations of location and/or policy to catch all

Item Policy and Rules Cleanup

- New CSI Equipment
 - Hello, new sewing machine
- Item policy in item record?
- Fulfillment rules matter!
- Fulfillment Configuration Utility

[Fulfillment>Advanced tools>Loans>

Fulfillment Configuration Utility] ... (thanks, Ted!)



How to do it Better

- Expect problems
 - Constant Vigilance!
- Have reports ready, check daily

Days overdue

Users with fines

Items with lost status

Item count by location