The Alma Impact

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Streamlined reserve loan rules and fine structures

Email notices & Due Date Receipts

Blurred lines between Tech Services, Circulation and all work areas- more collaboration, increased need for documentation

Rethinking replacement costs, billing fees, and fines
Streamlined reserve loan rules and fine structures

What prompted the changes?

1. Overdue notices
2. Fines

Changes made

1. We stopped using 1 day and 2 day loans. We chose to use hours for shorter duration loans.
2. We added a 2 hour grace period and an automatic overnight fine for netbooks.
Streamlined reserve loan rules and fine structures

Impact

1. Less confusing for Faculty adding items on reserve.
2. Less confusing for staff to explain to patrons.

Questions

Have you changed any of your reserve rules/fine structures?

How has that change impacted reserve checkouts?
Email notices & Due Date Receipts

What prompted the changes?

The Alma system did not easily print checkout receipts when we went live.

Changes made

1. Chemeketa students, staff and faculty emails are loaded through into our system.

2. Community patrons (in our CCRLS cooperative) must supply an email address.

3. We have a paper form if patrons want a written due date.
Email notices & Due Date Receipts

**Impact**

1. We have less problems with typos for email addresses.

2. We use less paper at our Circulation desks for checkout receipts.

3. We point patrons to checking their email for all notices from the library instead of using multiple formats.

**Questions**

Do your patrons miss the paper receipts?
Blurred lines between Tech Services, Circulation and all work areas- more collaboration, increased need for documentation

**What prompted the changes?**

1. In the previous system we had our Cooperative (CCRLS) to make changes in the local system.

2. Making changes often involves several adjustments in the system and in multiple locations.

3. Not everyone has the roles needed to make the necessary changes.

4. Monthly updates ensure the system changes quickly.

**Changes made**

1. We now make changes locally.

2. We meet more regularly

3. We document any changes made in Alma/Primo in a status log we keep updated.
Impact

1. By working together we all learn more about the system.

2. We use our status log and compare it with the monthly updates in Alma to track down issues.

Questions

How has the system changed how work areas collaborate at your library?
<table>
<thead>
<tr>
<th>Title</th>
<th>Date</th>
<th>Alma or Primo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tiny URL for Alma login</td>
<td>7/6/2016</td>
<td>Alma</td>
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<tr>
<td>Google Scholar links missing (case #00231792)</td>
<td>7/5/2016</td>
<td>Alma</td>
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I have made a tiny URL that leads to the Alma login page. Hopefully this will be easier to remember.

http://tinyurl.com/chemeketa-alma

Submitted this case to Ex Libris:

Title: Chemeketa Community College Library not linking in Google Scholar
Description: Chemeketa links to the Alma link resolver have disappeared from Google Scholar and Chemeketa does not appear in the IBRC.

Note: A post to the systems list indicates that AI has submitted a high priority case for the Alliance.

Received reply 07/06/2016:

Case Title: Chemeketa Community College Library not linking in Google Scholar
Last comment:

Our Development dept. identified and fixed the issue on ExLibris side.
In order to see the correct full text availability Google Scholar will need to re-harvest the holdings file.
We have contacted Google Scholar asking them to do so and hope that the issue will be resolved soon.
We apologize for the inconvenience this might have caused.

Sincerely,
Yonatan (Tier 2 Analyst)

As of 8:03 am this isn’t working yet. Will test Google Scholar later.
Rethinking replacement costs, billing fees, and fines

What prompted the changes?

Our replacement costs did not come over to Alma when we migrated. We no longer had any replacement costs when items were lost.

Changes made

We are in the process of evaluating replacement cost averages for each collection and assigning new default prices.
Rethinking replacement costs, billing fees, and fines

**Impact**

1. Some of our costs were significantly below the average cost of items in a collection. It was definitely time to make changes.

2. We are waiting for the impact as more items are changed to lost status. It is too soon to know yet.

**Questions**

Has anyone seen any changes?

Has anyone else increased their replacement costs after migration?

Will increased replacement costs lead to better return rates of overdue items?
Flexibility creating fulfillment unit rules. By location, item policy, user group. Etc.

Opportunity to streamline loan rules

Analytics dashboard allows easy access to stats across library work groups

Import data from Analytics as an itemized set and perform jobs on the set

Greater flexibility managing user accounts

Monthly update means that things can get fixed fast

Fulfillment Configuration Utility makes it easy to verify changes to fulfillment units, TOU
TESC Example: Created a simple dashboard prompt to aid weeding of the reference collection
<table>
<thead>
<tr>
<th>Title</th>
<th>Subject</th>
<th>Permanent Call Number</th>
<th>Publication Date</th>
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<td>B2430.S33 Z84 2008</td>
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</tbody>
</table>
Changing Student/Faculty/Staff users to Community users after they leave the college:

- Create analytics report of patrons with expired accounts and import file into Alma as an itemized set.

- Go to Run a Job and select “Update user information”

- Change user group to Community and toggle account to Internal.
Oregon State University

Auto-Renewals

1. Benefits for patrons – fewer fines, extended loan periods without need to check in, fewer emails

2. Benefits for the library – less processing time and effort, lower return frequency, more items in use

3. Cons/negative impacts – less fine revenue, no auto-renewed emails, confusion at the beginning, not selective – all that can renew will auto-renew.
Automatic Renewals in Alma

- Fulfillment Configuration
  - Library
    - Opening Hours
    - Relationships
    - Transit Time
    - Circulation Desks
    - SIP2 Bin Configuration
  - Physical Locations
    - Remote Storage
  - Physical Fulfillment
    - Fulfillment Units
    - Terms of Use and Policies
    - Block Preferences
    - Auto Loan Renewal Rules
    - Request Task Name
    - Request Pickup Configuration
    - Self Check Messages
  - Patron Configurations
    - Patron Groups
    - Patron Limits
    - Loan Limits
    - User Block Description
    - User Block Definitions
  - Digital Fulfillment
    - Digitization Departments
    - Digitization Profile Rules
    - Access Rights
    - Copyright Declaration
    - Electronic Documents

Courses
Setting the WHO and WHERE
Setting the WHEN

Highly recommended to match the timing of courtesy notices
WSU Vancouver

Patron accounts

Unaffiliated users

Patron blocks

ILL fulfillment workflow

Partially integrated management of a request

Temporary records, manual processing
Patron blocked or not?
Step 10

Continue down the page. From the dropdown box under **Request Status** select **Physically received by library**. Skip down to **Pickup At** and select **Vancouver Fac/Grad/Staff Office Delivery** for library staff and request **Library Express Delivery**. For regular patrons select **Vancouver Library**. Check the box below that says **Agree to Copyright**. Scroll back up to the **External Identifier** box and enter the barcode with a scanner if have one or key.
Cancel Hold on WSU, Summit & ILL items

Alma ➔ Expired Hold Shelf ➔
- Pull items on list from the shelf
- Pull ILL items older than current date
- Under each citation click “Reshelve” or “Transit” link
- Record will disappear from the list as well as patron’s account
- Place item on correct return shelf at circulation desk
- Add Cancellation Note as necessary: Please re-request item if it is needed. See reference for assistance.
- Notify User: check this box if you want a notice sent to the patron (generally yes)
- Confirm

Cancel hold on ILL & Summit records

Alma ➔ Fulfillment ➔ Resource Requests (2nd section) ➔ Scan in Items

Alma ➔ Fulfillment ➔ Resource Sharing (4th section) ➔ Borrowing Requests
- Locate item (in upper right hand corner you can use title search then verify item barcode)
- Remove
- Confirm removal
The Alma Impact

Future Discovery Open Calls

Topics from this session you would like to see pursued in more detail?

How has Alma effected your workflow?