

Fulfillment Organizational Structure

Welcome! In this session you will learn about the organizational hierarchy in Alma, as well as calendars, relationships and campuses.

This session will provide you with the conceptual knowledge of the organizational hierarchy's different entities. You can access detailed instructions on how to configure each entity in the Online Help

The organizational hierarchy in Alma consist of an institution, libraries and locations. All three are configured within Alma configuration. When configuring your institution, make sure you choose it in the Configuring drop down menu. Then go to General, and under Libraries choose "Add a library or edit library information".

Here you can see the details of your institution. Institutions are the foundation of the organizational structure. It's created and provided by Ex Libris. Each customer has one institution, and there is no option to create or delete institutions. When you login to Alma, you are logging into your institution.

Institutions contain libraries. Under the Libraries tab, you can see a list of the libraries in your institution. A library is the basic functional and operational unit in Alma. Circulation desks, acquisitions departments, locations - all of these are configured at the library level. You must have at least one library in your institution but you may have many more. Your libraries were created in Alma during the migration of data from your legacy system based on your migration form. You can add, edit or delete a library.

Note that to create and edit additional libraries in Alma, you must have a General System Administrator role.

The next level of the hierarchy is locations.

Locations are a sub-entity of libraries. and they are defined on the library level. When configuring the library's locations, choose the relevant library in the "Configuring" menu. Then go to General and under "Locations" choose "Physical Locations".

Locations contain physical inventory: holding records and item records. As such, any library with physical inventory must have at least one location.

Alma's approach to fulfillment is based on locations. We assume that items in the same location circulate according to the same policies for a given user group.

Every library that has physical inventory, must have a calendar that defines the library's opening hours and exceptions to those hours. Alma will use it when calculating due dates or overdue fines for example.

Let's return to the Add or Edit Library Information in Configuration, and clicki on the Calendar Management tab Here you can configure calendars at the institution level. You can manage calendars at the library level by going into a specific library and choosing the Calendar Management tab there.

Usually, standard opening hours will be defined in the Library, and exceptions like holidays and end of term will be defined at the institution level and apply to all libraries.

Here you can see the main Library calendar. With the standard opening hours, and with exceptions that were inherited from the institution.

Alma allows you to configure relationships between libraries in the institution. You define relationships within each library. Relationships define the services that one library is able to perform for another library, using the Fulfillment services.

"Deliver to" will enable delivery to another library in the institution

The "Circulate for" service will Enable check in and check out of physical material owned by another library. The "Acquire for" service allows a library to acquire items for a specified library. Note that the "acquire for" service can also be configured at the institutional level. This will allow the institution to acquire items for the library.

These services can also be configured for libraries from different Institutions. It is called a "Resource sharing library". You can read more about "Resource sharing libraries" in the Knowledge Center.

When configuring physical and electronic fulfillment you may want to configure campuses.

A campus is an entity that is configured within the institution. It is not a part of the organizational hierarchy that we've discussed and It is not mandatory to configure, But doing so will grant you additional possibilities related to physical and electronic fulfillment.

You may assign an IP range to a campus and then designate electronic resources as being available for only on-campus users.

You can also associate your users with a particular campus. This will allow them to access the campus-restricted e-resources even when they are off-campus without connecting via VPN.

You can also configure pickup locations for physical material according to the campus of the owning library or the campus of the requesting patron.

This has been an overview of Alma's Organizational structure.

Thank you for joining!