Alma Administration – Fulfillment
Calendars

Hello, calendars in Alma allow you to manage the open and closed dates of the institution and its libraries; and are used to determine due dates and overdue fines.

In this session you will learn how to update calendars in Alma, as well as how to recalculate fines and fees based on calendar changes.

You need to add a new closure date for Independence Day, for all libraries in your institution. So you’ll go to Configuration > General > Libraries > Add a Library or Edit Library information. Here you can see the Organizational Unit Details.

You need to add a new closure date for Independence Day, so you’ll click the Calendar Management tab. This shows you a list of all of the current institution level Events and Exceptions.

To create you’re new record click Add Record. There are three types of records you can make:

* Event – which is for special dates such as the end of the semester or an exhibition. Events do not indicate whether the library is open or closed.
* Exception – is used for open and closed dates and times, such as for holidays.
* And Standard Opening Hours – is for regular dates and times that the library is open.

After you select the type of record fill in the information as needed.

If you want to continue adding more records click Add. If you’re done click Add and Close.

You can also import bulk changes by clicking Import. For more information about how to use this feature please watch the session Update Library Opening Hours via Excel Import on our YouTube channel.

Click Apply Changes to run the calendar changes job so that your updates will take effect.

Click Save when you’re done. Your new closure date has now been added to the calendar and will be inherited to all libraries.

Next, you need to create a new exception for a staff training day at your library. Since it’s only your library you’ll select the library from the configuring menu. Then go to Fulfillment > Library Management > Opening Hours.

Here you can see any Exceptions and Events that have been inherited from the institution level will have a green check in the Inherited column and there will be no row action tool available for them.

To create your exception you’ll click Add Record.

Select Exception as the Record type, because this is a one-time occurrence. Then give it a description… and set the Valid from and Valid to fields. You could set specific hours that the library would be closed if the training were only going to be a half day, in this case it’s a full day event.

When you’re done click Add and Close. Then click Apply Changes to run the associated job to update the calendar, and then Save so that the calendar reflects your updates.

Your staff training day exception has now been created and applied to the calendar for your library.

Lastly, if there are last minute calendar changes that may impact due dates and/or overdue fines, you can bulk update them to reflect the change.

For example, you need to update due dates due to an unexpected library closure. This process is also recommended if you make any changes to the calendar and want to apply them to current loans to potentially waive any fines. To make bulk changes go to Alma > Fulfillment > Advanced Tools – Loans > Bulk Change Due Dates.

Enter in the relevant information including the library that the changes need to applied to, what types of materials, the range of current due dates that should be changed, and what the new due date will be. Then click Change Bulk Due Date, and Confirm. Your job to change the due date of the item types you specified has now been added to the table below. You can also see previous bulk due date changes that have been completed.

To keep your loans in line with any calendar changes you should also verify that the **Loans – Due Date Correction after Calendar Change** job is scheduled to run daily.

You can check this by going to Admin > Manage Jobs and Sets (section) > Monitor Jobs… and then click on the Scheduled Tab.

This is a fulfillment job, so you can use the drop-down to filter the list. This job should be scheduled to run every day. You can always run it manually when needed, as you just did in the previous step.

You now how to update calendars for the institution and its libraries, as well as recalculate fines and fees based on calendar changes. Thanks for watching!