Alma Administration – Resources  
Managing Libraries & Locations

Hello, Alma’s organizational structure is a hierarchy starting with an institution, which contains libraries that have physical item locations. You will have one institution, which can contain one or more libraries. Each library then has locations where items are located.

For more information about this structure, please watch the Fulfillment Organizational Structure session in the Alma Essentials training in the Knowledge Center.

In this tutorial you will learn how to create and remove locations, as well as how to configure Transit Time Rules for moving physical items between libraries.

To configure locations at your library, you’ll start by going to the Configuration menu. Physical locations are associated with a library, not the institution. So you need to select your library from the Configuring menu. As a General Administrator there are two ways to access the Physical Locations List, either by going to Fulfillment > Locations > Physical Locations, or General > Locations > Physical Locations.

Once the page loads, you can see a list of all the current locations at your library including the Code, Name, Type, and associated Fulfillment Unit. The Fulfillment Unit is important because it is the first step in the process that determines the loan attributes and how the items at that location will circulate.

You can filter by Location Type and Attached Fulfillment Unit using the drop-downs at the top of the page. If you click on the row action tool you have the options to Edit, Duplicate, and Delete.

Please note, if you edit a Location it may have implications for several functional areas in Alma, be sure to properly coordinate any changes you make. If you want to delete a location it cannot have any inventory associated with it. All items must be moved to another location first.

You need to create a new location for new books and materials, so you’ll click Add Location. The only required fields are the Code, Name, and Type. The Type determines whether it will be accessible to patrons, or if it is in closed stacks, remote storage, or not in library such as for an instructor copy. Your new location is available to patrons, so you’ll choose Open. Fill in any additional information as needed. Once you’re done click Add Location.

It is recommended that you attach new locations to a circulation desk to allow for handling times, including picking from shelf, checking in and out, reshelving, etc. To do this you’ll open the row action tool of the location you just created and select Edit.

In the Physical Location Circulation Desks List section, there is the option to create a new circulation desk and attach it to this location or use an existing circulation desk. If you click Add New Circulation Desk, you’ll be taken to a wizard to create the new desk. For more information about how to create a Circulation Desk please watch the Circulation Desks session in the Alma Essentials training in the Knowledge Center.

In this case you’ll just click Attach Existing Circulation Desk and choose a Circulation Desk from the drop-down. Then choose which services this desk will perform. You can add more than one circulation desk if this one does not perform all these services. Once you’re done click Attach Existing Circulation Desk. Then click Save.

Lastly, to configure transit times between libraries, which is the amount of time expected when transferring items from one library to another. In this case, you need to configure a Transit Time Rule for moving items from the Music Library to the Main Library. First you need to go back to the institution level, and then go to Fulfillment > Library Management > Transit Time. Transit Time Rules enable Alma to calculate the feasibility and expected delivery times for fulfillment requests.

If you want Alma to estimate how long it will take for an item to get to another library based on your current rules you can click Calculate ETA. You’ll select the From… To… what type of material… where it’s located… and the Start Time of the request. Then click Calculate ETA. Click the back arrow when you’re done.

Now you need to make a new rule for transit times between the Music Library and the Main Library. To add the new rule, click Add Rule. The only required fields are the Name and Delivery Time, which is in hours. The From and To fields can have multiple selections, but if you want to set a specific Item Location, you can only select one of each; otherwise Item Location will be set to Any. Leave Start Time as an asterisk if you want any time to be calculated. This rule will now calculate the time for any item from the Music Library being transferred to the Main Library - General location, to take 6 hours.

Click Save when you’re done… and your new Transit Time Rule between the Music and Main libraries has been configured.

You now know how to configure locations and Transit Time Rules. Thanks for watching!