Adding a New Pickup Location (Library)

Use these instructions when adding a new library in an Institution Zone that will serve as a pickup and return location within the WRLC automated fulfillment network.

Because this process affects fulfillment, resource sharing, Primo, and patron-facing letters, complete all applicable steps and test the configuration before making the new pickup location available to patrons.

Before You Begin

Gather the following information:

- Library name and code
- Associated campus
- Circulation desk name and code
- Physical locations that will belong to the library
- Operators who need access to the circulation desk
- Default printer, if one will be used
- The date the new pickup location should become available in Primo
- Contact information or wording needed for patron-facing letters

If existing inventory will be moved to the new library, identify the affected locations and inventory before changing the configuration.

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1. Add the Library

You must have the **General System Administrator** role to create a library.

1. Log in to the appropriate Alma Institution Zone.
2. Open the **Configuration Menu**.
3. Confirm that the Institution Zone—not the Network Zone—is selected in the **Configuring** field.
4. Navigate to:
   General > Libraries > Add a Library or Edit Library Information
5. Select the **Libraries** tab.
6. Select **Add a Library**. The **Add an Organization Unit** page opens.

7. Complete the following fields:
   - **Organization Unit Name:** Enter the name that should be used for the library in Alma.
   - **Organization Unit Code:** Enter a unique code for the library.

   The library code cannot contain spaces or special characters such as quotation marks. Use letters, numbers, hyphens, or underscores.
   Choose the code carefully. After the library is created, its code cannot be changed. Correcting the code would require creating a new library.
8. Select **Save**.

Alma creates the library and automatically adds some initial library-level configuration, including a default physical location. Other components—such as circulation desks, printers, contact information, opening hours, and additional physical locations—must be reviewed and configured separately.

After creating the library:

1. Return to:
   Configuration > General > Libraries > Add a Library or Edit Library Information
2. Select the **Libraries** tab.
3. Locate the new library.
4. Open the row-actions menu and select **Edit**.
5. On the **Summary** tab, review and configure the following fields as applicable:
   - **Default Location for Acquisitions**: choose the general stacks location associated with the new library from the drop down menu. May need to be configured later, after the library's permanent physical locations have been created.
   - **Campus**: choose the corresponding campus from the drop down menu. May need to be configured later, after the campus has been created.
   - **Serves Other Institutions** (checkmark this!)
     Selecting **Serves Other Institutions** allows the Institution Zone to accept pickups and returns for other institutions in the WRLC fulfillment network. The field appears only when the Institution Zone has been configured as part of a fulfillment network. This setting alone does not make the new library an available pickup location. You must also configure the library's campus, organization-unit relationships, circulation desk, physical locations, Primo pickup-location settings, and applicable fulfillment rules.

6. Select **Save** after completing the applicable settings.

Add Contact Information

1. Edit the new library and select the **Contact Information** tab.
2. Use the applicable options to add:
   - Physical address
   - Telephone number
   - Email address

3. Mark the appropriate entries as preferred.
4. If the library should use its own reply-to address for patron notices, add an email address designated for **Circulation Communication**.
5. Select **Save**.

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2. Add or Assign a Campus

A library can be associated with a campus so that Alma can manage certain services and resources at the campus level. Campus names may also appear in Primo VE, including in pickup-location menus and request forms.

You must have the **General System Administrator** role to create or configure a campus.

Each library can be associated with only one campus.

Determine Whether a New Campus Is Necessary

Before creating a campus, review the campuses that already exist in the Institution Zone.

Navigate to:

Configuration > General > Libraries > Define Campuses

If an existing campus should include the new library, assign the library to that campus. Do not create a duplicate campus.

If no appropriate campus exists, follow the instructions below to create one.

Create a New Campus

1. Log in to the appropriate Alma Institution Zone.
2. Open the **Configuration Menu**.
3. Navigate to:
   General > Libraries > Define Campuses
4. Select **Add Campus**.
   - **Code:** Enter a unique code for the campus.
   - **Name:** Enter the campus name that should appear in Alma and, where applicable, Primo.
   - **Description:** Enter an optional description.
   - **Proxy:** Select a proxy profile if the campus requires one. May need to consult with institution's e-resources librarian for this information.
5. Select **Add and Close**.

The campus is now created, but the new library must still be assigned to it.

Assign a Library to an Existing Campus

The simplest way to associate the new library with a campus is through the library record.

1. Navigate to:
   Configuration > General > Libraries > Add a Library or Edit Library Information
2. Select the **Libraries** tab.
3. Locate the new library.
4. Open the row-actions menu and select **Edit**.
5. On the **Summary** tab, locate the **Campus** field.
6. Select the appropriate campus.
7. Select **Save**.

Alternative: Assign the Library Through the Campus Record

You can also add the library from the campus configuration.

1. Navigate to:
   Configuration > General > Libraries > Define Campuses
2. Locate the appropriate campus.
3. Open the row-actions menu and select **Edit**.
4. Select the **Served Libraries** tab.
5. Select **Add Library** or **Add Served Library**.
6. Select the new library.
7. Select **Add and Close**.
8. Select **Save** if Alma prompts you to save the campus record.

Because a library can belong to only one campus, assigning it to a different campus may replace its existing campus association.

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3. Review Organization Unit Relationships

Organization unit relationships determine which fulfillment services one library can provide for another library within the same Institution Zone.

You must have one of the following roles:

- **General System Administrator**
- **Fulfillment Administrator**

Understand the Direction of a Relationship

A relationship is configured from the perspective of the library selected in the **Configuring** field.

For example, if the new library is selected in **Configuring** and another library is selected in the relationship’s **Library** field:

- **Circulate For** means the new library can check in and check out items for the selected library.
- **Deliver To** means the new library can deliver requested items to the selected library.
- **Supply From** means the new library can supply items to the selected resource-sharing library.
- **Acquire For** means the new library can acquire materials for the selected library.

Relationships are directional. Adding a relationship from Library A to Library B does not necessarily create the corresponding relationship from Library B to Library A.

For a new pickup library, review both:

1. The services the new library must provide for existing libraries.
2. The services existing libraries must provide for the new library.

Review and Add the New Library's Relationships

1. Log in to the appropriate Alma Institution Zone.
2. Open the **Configuration Menu**.
3. In the **Configuring** field, select the new library.
4. Navigate to:
   General > Libraries > Relationships
5. On the **Organizational Units Relationships Setup** page, select **Add Relation**.
6. In the **Library** field, select the library that will receive services from the new library.
   If the same relationship should apply to all applicable libraries currently in the Institution Zone, select **ALL**.
7. Select the services the new library will provide:
   - **Circulate For:** Allows the new library to check in and check out materials belonging to the selected library. If this relationship is not configured, Alma may block a loan or return performed at another library.
   - **Deliver To:** Allows the new library to deliver requested items to the selected library.
   - **Supply From:** Allows the new library to supply its materials to the selected resource-sharing library.
   - **Acquire For:** Allows the new library to acquire materials for the selected library.
8. Add a note if local documentation is needed.
9. Select **Add and Close**.
10. Confirm that the new relationship appears on the **Organizational Units Relationships Setup** page.

Repeat these steps if different services must be configured for different libraries.

"ALL" Relationships

Do not assume that an existing **ALL** relationship automatically includes a library created after the relationship was established.

Ex Libris indicates that selecting **ALL** when creating a relationship applies to the libraries that exist at that time. Therefore, after creating a new library:

1. Review the applicable relationships configured for the other libraries in the Institution Zone.
2. Determine whether each existing library must circulate for, deliver to, supply from, or acquire for the new library.
3. If the new library is not included, edit the existing relationship or add a separate relationship for the new library.
4. Repeat this review for every existing library that must exchange materials or provide services with the new library.

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4. Configure a Default Printer, If Needed

A printer must exist in Alma before it can be selected as the default printer for the new circulation desk.

If the library will not print slips or receipts locally, confirm whether it should use an existing email-enabled printer, a shared printer, or no printer.

You must have one of the following roles:

- **General System Administrator**
- **Fulfillment Administrator**

Review Existing Printers

1. Log in to the appropriate Alma Institution Zone.
2. Open the **Configuration Menu**.
3. In the **Configuring** field, select the new library.
4. Navigate to:
   General > Printers > Printers
5. Review the existing printers.

If the new library will use an existing printer, confirm that the printer is active and available for selection when configuring the circulation desk.

Add a Printer

If a new printer is required:

1. On the **Printers** page, select **Add Printer**.
2. Enter the required printer information, including:
   - **Code:** Enter a unique code for the printer.
   - **Name:** Enter a recognizable name.
   - **Status:** Set the printer to **Active**.

- **Email:** Enter the email address that receives Alma printouts, if the printer uses email-based printing.

3. Select **Add and Close** or **Save**.
4. Confirm that the new printer appears on the **Printers** page.

The printer code should clearly identify its institution, library, or circulation desk. Avoid using a generic code that could be confused with printers at other libraries.

Assign the Printer to the Circulation Desk

After creating the printer:

1. In the **Configuring** field, select the new library.
2. Navigate to:
   Fulfillment > Library Management > Circulation Desks
3. Locate the appropriate circulation desk.
4. Open the row-actions menu and select **Edit**.
5. On the **General Information** page, locate the **Printing Information** section.
6. Select the printer in the **Default Printer** field.
7. If staff should be able to choose among multiple printers, add them in the **Additional Printers** field.
8. Continue through the circulation-desk configuration and select **Save**.

The default printer is used for non-automated print jobs. Automatic request-slip printing is configured separately in the circulation desk's **Automatic Printing** rules.

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5. Configure the New Circulation Desk

When a new library is created, Alma may create a default circulation desk with the code `DEFAULT_CIRC_DESK`.

Because Alma uses the same default code in multiple libraries, consider creating a circulation desk with a unique code. A unique code makes the desk easier to identify in Analytics, integrations, letters, and troubleshooting.

You must have one of the following roles:

- **General System Administrator**
- **Fulfillment Administrator**

Create a Circulation Desk

1. On the **Circulation Desks** page, select **Add Circulation Desk**.
   To base the new desk on an existing desk, open the existing desk's row-actions menu and select **Duplicate**. Review every copied setting before saving.
2. On the **General Information** page, enter:

- **Code:** Enter a unique circulation desk code.
- **Name:** Enter the staff-facing name of the desk.

3. Select **Primary**.
   A library must have at least one primary circulation desk for its request option to appear in Primo. A primary desk can also perform check-in and check-out services for another library when the appropriate organization-unit relationships exist.
4. Select **Picks from Shelf**.
5. Select **Has Hold Shelf**.
   Alma requires a library that picks requested items from the shelf to have a circulation desk with a hold shelf.
6. In **Maximum Time on Hold Shelf (Days)**, enter `10` for a CLS pickup location.
7. Select a **Hold Shelf Sorting** option appropriate for the library.
8. Select the printer in the **Default Printer** field, if applicable.
9. Configure any additional settings used by the institution, such as:
10. Select **Next**.

Attach Physical Locations

On the **Physical Locations** page:

1. Select **Attach Location**.
2. Select a location served by the circulation desk.
3. Select the services the desk provides for that location:
   - **Check In**
   - **Check Out**
   - **Reshelve**
4. Select **Attach Location**.
5. Repeat for every location served by the desk.

If **Check In** or **Check Out** is not selected, Alma may not allow items from the location to be placed on the hold shelf.

If the library’s permanent locations have not yet been created, complete the circulation-desk wizard and return to attach them later.

Add Operators

Add all staff members who need to work at the circulation desk.

Be sure to add **WRLC Admin** as an operator so that WRLC staff can assist with configuration, testing, and troubleshooting.

Deleting an Unneeded Circulation Desk

If you create a new circulation desk, you may want to delete both the automatically generated default desk, and any other old circulation desks.

Before deleting a circulation desk, confirm that:

- No physical locations are associated with it.
- No requests are associated with it.
- It is not being used as the default or primary desk for another configuration.

1. Navigate to:
   Fulfillment > Library Management > Circulation Desks
2. Locate the old circulation desk.
3. Open the row-actions menu and select **Delete**.
4. Confirm the deletion.

If Alma prevents the deletion, review the error message and remove the identified dependencies. If no remaining locations or requests can be found but Alma still prevents deletion, open an Ex Libris support case.

Do not delete the old circulation desk until the new desk and its location associations have been fully configured and tested.

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6. Create or Recreate Physical Locations

Physical locations belong to a specific library. Alma does not permit an existing location to be reassigned directly from one library to another. If inventory is moving to the new library, recreate the necessary locations under the new library and then move the inventory.

You must have one of the following roles:

- **General System Administrator**
- **Fulfillment Administrator**

Create a Location

1. Open the **Configuration Menu**.
2. In the **Configuring** field, select the new library.
3. Navigate to:
   Fulfillment > Locations > Physical Locations
4. Select **Add Location**.
5. Complete the required fields:
   - **Code:** Enter a unique location code of no more than 10 characters. Do not use commas.
   - **Name:** Enter the staff-facing location name.
   - **External Name:** Enter the name that should appear to patrons in Primo. If this is blank, Alma displays the regular location name.
   - **Type:** Select **Open**, **Closed**, **Remote Storage**, **Unavailable**, or **Not in Library**, as appropriate.

    - **Fulfillment Unit:** Select the fulfillment unit whose rules should apply to items in this location.
    - **Call Number Type:** Select the applicable call-number type, if needed.
6. If the location is associated with remote storage, select the appropriate **Remote Storage** configuration.
7. Select **Add Location**.
8. Repeat for each physical location required by the new library.

The fulfillment unit controls important circulation behavior. Compare the selection with a similar existing pickup library before saving the location.

Attach the Circulation Desk to the Location

After creating a location:

1. On the **Physical Locations** page, open the location's row-actions menu and select **Edit**.
2. Locate the **Physical Location Circulation Desks List** section.
3. Select the new circulation desk.
4. Select the services it will perform for the location:
    - **Check In**
    - **Check Out**
    - **Reshelve**
5. Select **Attach Existing Circulation Desk**.
6. Select **Save**.

A location can be served by more than one circulation desk. Review all listed desks and remove obsolete associations when appropriate.

Move Existing Inventory to the New Library

If an existing location is being moved to the new library:

1. Create the replacement location under the new library.
2. Reproduce the required settings, including:
    - Location type
    - External name
    - Fulfillment unit
    - Call-number type
    - Circulation desk associations
    - Discovery configuration
3. Create a set containing the holdings or items that must be moved.
4. Use the appropriate Alma inventory-management job or scan-in workflow to move the holdings or items to the new library and location.
5. Search Alma to confirm that the holdings and items now display the correct library and location.
6. Do not delete the old location until no inventory remains associated with it.

The appropriate job depends on whether entire holdings records or only selected items are moving. Review the inventory structure before selecting a job; moving an item and moving a holding are not the same operation.

Locations for SCF materials

If any of the new locations store SCF materials, please see the Remote Storage Location Configuration page for instructions on how to create a new location for SCF materials in the owning Institution Zone.

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7. Add the Pickup Location to Primo

The new library must be enabled in the Alma discovery configuration before patrons can select it as a preferred local pickup location.

You must have a role that permits Primo VE or discovery configuration.

1. Log in to the appropriate Institution Zone.
2. Open the **Configuration Menu**.
3. Confirm that the Institution Zone is selected in the **Configuring** field.
4. Navigate to:
   Discovery > Resource Sharing > Resource Sharing Request
5. Locate the new library in the pickup-location configuration.
6. Select **Preferred Local Pickup Location** for the new library.
7. Confirm that the library's display name is correct.
8. Select **Save**.

The exact page label may differ slightly depending on the Alma release and the institution's discovery configuration. If **Resource Sharing Request** is not displayed under **Resource Sharing** , search the Configuration Menu for that page name.

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9. Update Network Zone Letters

The following Network Zone letters must be updated to account for the new pickup library:

- On Hold Shelf
- Ful Resource Request Slip

For both letters, follow the instructions below.

1. Log in to the Alma Network Zone.
2. Navigate to:
   Configuration > General > Letters > Letters Configuration

3. Search for either :
   Ful Resource Request Slip Letter or **On Hold Shelf Letter**
4. Open the row-actions menu and select **Edit**.
5. Review the labels and XSL template.
6. Search for conditions based on:
   - Pickup library code
   - Destination library code
   - Owning institution
   - Owning library
   - Request type
   - Existing WRLC pickup locations
7. Add the new library or circulation desk code to the applicable conditional logic.
8. Add some or all of the following, depending n the preferences of the Institution and the letter being configured:
   - Library name
   - Destination or routing code
   - Pickup location
   - Shipping or handling instructions
   - Local notes
   - Display name
   - Pickup address
   - Contact information
   - Pickup instructions
   - Hours or other local information, if included in the notice
9. Confirm that the new condition is placed before any general fallback condition that would otherwise capture the request.
10. **Save and Distribute** the template. This will push changes made in the Network Zone to all of the Institution Zones, minus the Shared Collections Facility.

Final End-to-End Testing

After completing all configurations, test the entire workflow before announcing the new pickup location.

Test at minimum:

- A locally owned item requested for pickup at the new library
- An item owned by another library in the same Institution Zone
- A CLS item from another WRLC Institution Zone
- An SCF item
- Check-out at the new library
- Return at the new library
- Hold-shelf placement and expiration

- Pull-slip
- On Hold Shelf letters
- Routing back to the owning library or institution

Configure Locations Housing SCF items

If any of the new locations associated with the new Library also store SCF materials, please see the Remote Storage Location Configuration page for instructions on how to create a new location for SCF materials in the owning Institution Zone.

Configure Shared Collections Facility Pickup

If SCF materials CAN be put on hold at new location, please follow the instructions above ***as well as the instructions found on the Adding a new pickup location for SCF material pickup page.***

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