

Workflows & Policies

Issuing Bridge Community Cards

- Creating accounts in Alma - done by staff ahead of time
 - First Name - Name
 - Last Name - Name
 - Primary Identifier - barcode number on card
 - User Group - SO/CC Local Community
 - Campus - CARLETON or STOLAF
 - Expiration Date
 - Carleton - the date when the account is created
 - Intended to expire immediately and be renewed for one year when issued to a new patron
 - Olaf - one year from when the account is created
 - Staff will manually extend the expiration to one year when the cards are issued to patrons
 - Purge Date - LEAVE BLANK
 - Password - Library123
- Issuing new accounts
 - Have patron fill out registration form
 - Future project: use joint online registration form
 - Issue Bridge community card to patron
 - Give "Welcome" bookmark
- Renewing expired accounts
 - Renew account for one year
 - Update contact information
 - Change account primary identifier to new Bridge card barcode
 - From patron's account, click on ID number link, click on General Information tab, change Primary Identifier
 - If at St. Olaf:
 - Take old card and give new Bridge card
 - If at Carleton:
 - Ask if they have money on their old card or need to do printing with it.
 - If yes, they can keep their old card as a printing card, but it will no longer be a library card. Give them new Bridge card.
 - If no, take old card and give new Bridge card
 - Give old card to supervisor so supervisor can tell OneCard office to deactivate that card's record
- Replacing lost cards
 - If at Carleton:

- Ask if lost card was an affiliate card.
 - If yes, direct them to OneCard office to get new affiliate card printed.
 - If no, move on to next step
- Change account primary identifier to new Bridge card barcode
 - From patron's account, click on ID number link, click on General Information tab, change Primary Identifier
 - New Bridge card must not already have a Community Card account created for it
- Given new Bridge card to patron

Fines Processing

- The "Export to bursar using profile Bursar Export: Carleton" and "Export to bursar using profile Bursar Export: St. Olaf" jobs are scheduled to run every Sunday at 8pm.
 - These jobs export all of the fines on Carleton and St. Olaf student accounts, respectively.
 - Only fines at least 7 days old are exported.
 - In Alma, the balance of these fines is set to 0, and the fines are given a status of "Exported and Paid".
 - The exported XML file is deposited in an FTP server at Olaf.
- The fine statuses are updated in Analytics the next day (Monday) at 6pm.
- Staff at both schools can then run Analytics reports on Tuesday.
 - Within the Fines/Fees subject area filter to Status = "Exported and Paid".
 - Filter to a Status Date of the past 7 days.
 - Save report as Excel document.
- Send the report to the respective business offices.

Lost/Missing Items

- Items that are overdue on patrons' accounts for 30 days (or 7 days in the case of fast tracked items) are automatically set to Status = Lost by Alma's Overdue and Lost Loan profiles.
- On the 2nd of each month Analytics automatically sends Natalie and I an Excel file that contains a single column of our school's item barcodes that have been in the Lost status for 30 days or more.
 - Download the Excel file to our computers.
 - Create an itemized set from the barcode file.
 - Run the "Close lost loans" job on the set, which switches these items from Lost to Missing.
- Replacement fees stay on patrons' accounts, but the loan is now severed from the fee. If patrons return items they will not be credited back the replacement fee. The item will be changed from Lost to In Place.

- If a patron asks for replacement fee to be waived circulation staff will consider it.
- Each month Analytics sends report of Missing process type items to Natalie/Sarah Q. (Olaf items) and Lisa/Jason (Gould items)
 - Sarah and Lisa make replacement/withdrawal decisions on these items. The goal is to not let any items remain in Missing process type for over a year.

Overdue Recalls

- Overdue recalled items are on an overdue fast track, which means truant patrons receive an overdue notice every day for seven days and then once a week for the next three weeks.
- Truant patrons' accounts are blocked until the overdue recalled item is returned.
- Library staff may email the truant patrons belonging to their respective campuses if they desire.

Purging Expired User Records

- Timeline
 - Purge expired user records in bulk once a year during December winter breaks.
- Criteria
 - User Group = "CC Student", "CC Faculty", "CC Staff"
 - All records where Expiry Date = 30 days or more in the past
 - User Group = "SO/CC Local Community"
 - Campus = "STOLAF"
 - All records where Expiry Date = 730 days (2 years) or more in the past
 - Campus = "CARLETON" and Status = "Active"
 - All records where Expiry Date = 730 days (2 years) or more in the past
 - Campus = "CARLETON" and Status = "Inactive"
 - All records where Expiry Date = 30 days or more in the past
 - These are actually departed faculty, students, and staff that have transitioned to Local Community in the user loads.
 - Records with fines of \$500 or more will not be purged. Instead, we will investigate the fines and determine if they need to be addressed.
 - Records with active loans will not be purged.
- Workflow
 - Run the following Analytics reports saved in Shared Folders → Bridge Consortium → Reports → Fulfillment → Bridge:
 - "Expired User Records for Annual Purging Workflow - Carleton Users"
 - "Expired User Records for Annual Purging Workflow - St. Olaf Users"
 - Save each report as an Excel spreadsheet.

- Inspect the spreadsheets, look for abnormalities, confirm the users are ready to be purged.
- Run the following Analytics reports saved in Shared Folders → Bridge Consortium → Reports → Fulfillment → Bridge:
 - “Expired User Records for Annual Purging Workflow - Carleton Users - No Purge Date”
 - “Expired User Records for Annual Purging Workflow - St. Olaf Users - No Purge Date”
- Save each report as an Excel spreadsheet.
- Create itemized set from each spreadsheet.
 - Run Update Users job on these two sets in which you set the Purge Date to five days prior to the current date.
- Create itemized user sets of the master spreadsheets.
 - Run Update Users job on these two sets in which you set the User Group to “Purge group”.
- Run the Purge Users job using the following parameters:
 - Number of Days After Purge Date = 0
 - User Record Type = Public
 - User Group = “Purge group”
 - Waive Threshold = 500
- Look at job report for records that were not purged, troubleshoot those records
- Save Spreadsheets in FWG Google Drive for future reference.

Claimed Returned

When a patron reports that they have returned an item, we will not use the Claimed Returned status because Ex Libris has not implemented it in a useful way in Alma. Instead, here’s what we’ll do.

1. Ask the patron for more details about when and where it was returned and who returned it.
2. Search your library for the item, and potentially ask the other library to search for it just to be safe.
3. If the item is not found, copy the barcode in Alma and virtually return the item to get it off the patron’s account.
4. Use “Physical Titles” to search for the barcode in Alma.
5. Click on “Items”.
6. Click on the action button to the right of the item and select “Toggle Missing Status”.

The item is now in a Missing status and will show up on Collection Development’s missing items reports. If the patron returns the item in the future its Missing status will be cleared if the item hasn’t already been withdrawn or replaced.