Public Services Council Meeting of May 25, 2021

All interested Library staff were invited to this Public Services Council forum to learn how Berkeley materials will circulate in Alma beginning July 27, 2021. Mark Marrow showed how our implementation of the SILS is configured with the new fulfillment units for library locations (and sublocations) and discussed the terms of use including the default loan periods for various item types.

Currently in Millennium for each item type there are default loan rules, but many variations for different locations. As a starting point, Mark showed the 954 lines in the current Millennium loan rule determiner table. Default loan rules were determined when we changed to Millennium by following what the unit with the majority of those items used (such as following the default in Millennium for scores based on Music Library's former loan periods). With the new SILS we will be shifting to using the default loan rules across units, with far fewer exceptions.

In our new SILS, terms of use for items are based on fulfillment unit (location) and patron type (such as undergraduate, graduate student, faculty, staff, etc). With Alma, all types of items in a fulfillment unit will circulate the same way. For each of the fulfillment unit types we need to set the rules for how those items will circulate. Those determine which patron types can use the item and how long they can use those items. Unless otherwise indicated, items in General fulfillment units and items at NRLF will be requestable by users from other UC Libraries directly through SILS via the automated fulfillment network (AFN) which supports the philosophy of all UC Libraries supporting all UC patrons.

We have created eight types of fulfillment units, described below:

General -- open stacks circulating collections: these will be requestable by a Berkeley patron and possible to pick up in any location, though is set so serials will not be requestable by network users (though AFN)

Reserves -- all reserve locations and available to students and faculty; these are not available to network users (through AFN)

Media -- all locations with media and available to students and faculty; these are not available to network users (through AFN)

Closed -- reference and special collections not circulating; special set up for sublocations that have been non-circulating in the past (as with Art History/Classics and East Asian Library)

Limited -- short-term loans (usually 4-12 hours); set up for sublocations that had short loans before (such as aspects of Bancroft and Biosciences cookbooks collection)

NRLF -- for Berkeley unrestricted items at NRLF so these can be circulated to network users (through AFN) (the restricted items at NRLF are in the closed fulfillment unit)

Short-term -- short-term loans for equipment

As an example at the Environmental Design Library the main circulating collection and folio collection are General; the bound journals sublocations are Limited. Mark Marrow and Beth Dupuis will explore how best to share information about the fulfillment units and loan rules for each of the locations and sublocations.

A question arose about the loan rules for new books. New books across all our libraries will be treated as General thus will be requestable by Berkeley users and by network users via the AFN.

As we continue to test and after we go live on July 27, 2021, we will learn how the loan rules are working and if we need to make some revisions. For example we may find that a collection needs to move from General to Limited or Closed, or that a term of use needs to be tweaked. With Alma, the list of fulfillment unit types and options for item loan rules are limited and designed to work across all libraries.

In Millennium it took a long time for us to work through many questions and workflows such as how to withdraw items, how to create a new sublocation, etc. These specifics will continue to be addressed by the various functional groups now and well after the go-live date.

Patrick Shannon emphasized the way that this new system will change how we think of interlibrary borrowing/lending and how we operate with the other UC Libraries. In this new system patrons from the other UC Libraries will be treated much like our own students, faculty, and staff at Berkeley and vice versa. Interlibrary loan won't be as separate of a process as it has been. Users will be able to directly request items via the system; requests will be received by and paged by the owning library location; and items will be sent to the Interlibrary Services via courier to the requester's home library.

Mark Marrow emphasized that this is the time for staff on the fulfillment and resource sharing functional group to focus on testing, when we can make changes in the test environment that gets implemented. Functional group testers are encouraged to choose some of your items, practice checking them out, and look at the term of use assigned to that item to make sure that

the current configuration is working for your needs. If it is not working as needed, changes can be made now before the freeze.

A suggestion was made to host another forum to show the circulation process live.

Lynne Grigsby noted that, unlike Millennium, with Alma only staff with the circulation role (an authorization in the system) will be able to check out items.