Locker Library Setup

Alma Library, Notices, and LuxerOne Webhook

Setting up Alma Library

When thinking about how we wanted to use lockers, we were faced with the decision of whether we wanted to have any physical item request be placed in the lockers, or if we wanted people to choose the location they wanted to use; our holdshelf available M-F, 8am-5pm, or our 24/7 lockers. We knew that we were going to have capacity issues when we started averaging 40+ requests a day and when we open the library back up, we wanted as many choices available to our patrons regarding how they wanted to access their items. Currently in Alma, it is not possible to be able to have a choice to deliver to any desk in a library. Ian Chan has submitted a suggestion to the Idea Exchange that would allow for multiple pickup locations in a library. Please visit and add your votes so that this idea can get more visibility.

In order to create a workflow that allows for the patron to choose between the lockers and the regular holdshelf, a new library must be created for the lockers. This library will have no inventory, just a desk with a relationship with your main library to allow for sharing. To create/edit a library you must have the following permissions: General System Administrator. The pathway to configure these options is ***Configuration Menu > General > Libraries > Add a Library or Edit Library Information***

When considering the Organizational Unit Name, think about which order you want your pickup locations to be viewed in OneSearch. We've chosen 24/7 Lockers so that it will be the first option that patrons see.

The next step in creating your locker library is to configure the ***DEFAULT_CIRC_DESK*** at this library. This will be the Primary desk, as items can only be delivered to the Primary desk of a library.

Lockers

General Details | Physical Locations | Work Order Types | Operators | Automatic Printing

General Details ⌄

Name * **Lockers**

Primary ☑

Reading room desk ☐

Picks from shelf ☑

Supports personal delivery ☐

Time to reshelve (hours) [   ]

Delay for hold notification (minutes) [   ]

It is not necessary to check the box that this shelf creates loan receipts, but we have checked it so that when we check out from this desk to put the item in the locker, the notice that goes out with the due date will include a highlighted message that says a 2nd email from Luxer will be coming with directions on how to pick up your item. Every item that goes to the lockers is checked out at the 24/7 library desk to allow for the if/then statement to be triggered. This will be explained later.

This item will have to have the 'Has hold shelf' button selected in order for the desk to be a selectable location in OneSearch. It also has the added benefit of potentially being integrated with the lockers and have the act of opening up the lockers be the trigger to check the material out. This concept is still being discussed. You will have to choose how you want this illusory holdshelf to sort the shelf and how many days you want to have the items on the hold shelf. Until this desk uses the holdshelf, however, these selections don't matter. No other selections need to be made.

Circulation Desk - General Information

Printing Information

Default Printer	
Additional Printers	
Creates return receipts	☐
Creates loan receipts	☑
Loan receipt destination	User preferred email

Hold Shelf Information

Has hold shelf	☑
Hold shelf sorting	Requester Name
Maximum time on hold shelf (Days)	6
Has hold shelf processing	☑
Notify patron of canceling expired hold	☐

Digitization Department

Supports Digitization	☐

The final step in creating this library is to set up the relationship it will have with your main library. Choose to configure your **main library**, which in our case is the Pollak Library. If you have multiple libraries you will see the different relationships that they have with each other. In order to have the location show up in OneSearch as well as being able to check material out at that desk, you will need to have the locker library both 'Deliver To' and 'Circulate For' the main library. You can activate the 'Deliver To' option to have the new location show up as a choice and whenever you want to disable this location, just uncheck that same box.
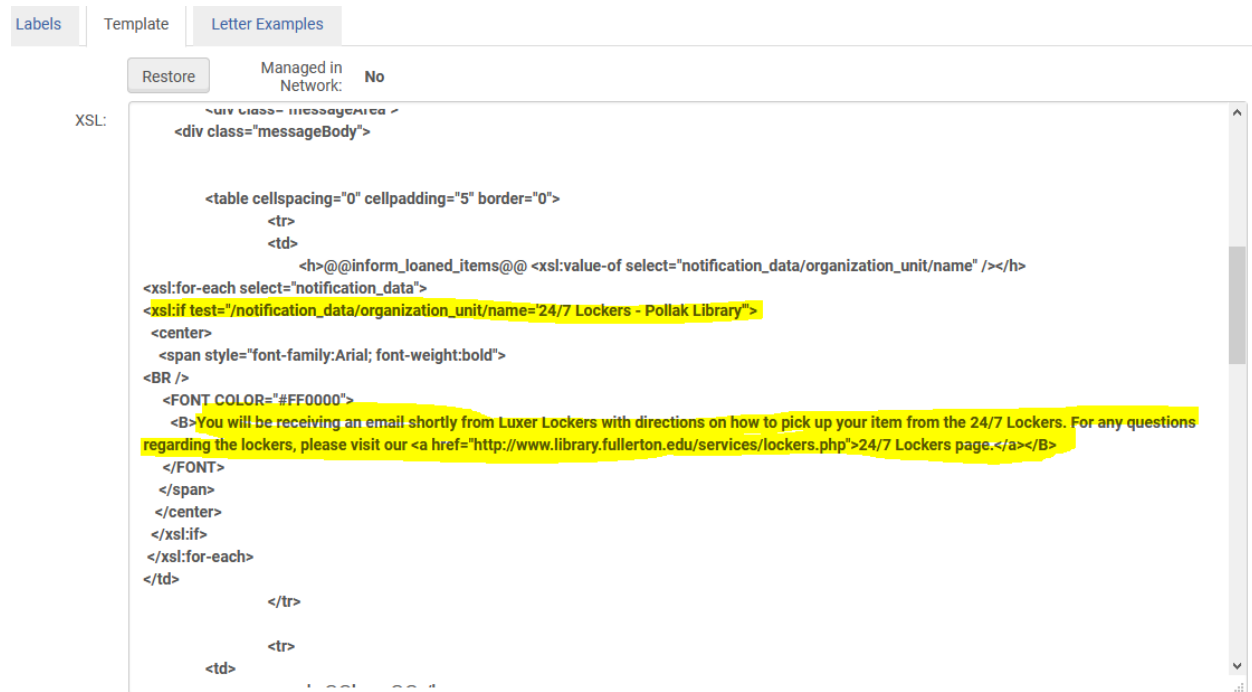

Organizational Units Relations Setup

	Name	Description	Deliver To	Circulate For	Acquire For	Supply From	Note	
1	All	-	☐	☐	☐	☐	-	...
2	Resource Sharing Library	Temporarily manages inventory that is sent to or received from resource sharing partners	☑	☑	☐	☐	-	...
3	24/7 Lockers - Pollak Library	Locker pickup for Pollak Library	☑	☑	☐	☐	-	...
4	Irvine Library	Irvine Library	☐	☑	☐	☐	-	...

Alma Locker Loan Receipt Notices

Due to the fact that we have to check the material out to the patron before placing it in the locker, we needed to make a decision on how patrons will be notified of both the checkout and the passcode to the lockers. It is possible to have the 24/7 Locker desk not send receipts upon checkout and simply have the Luxer email be the only notification of an item being available. We thought the patron might be confused as to whether the item was already checked out and what the due date is. The solution to this, was to send out a loan receipt with a modified message activated when an item is checked out using the 24/7 Locker desk. This message, highlighted in red, explains that a second email would be coming shortly from LuxerOne Lockers explaining how they can pick up their items and a link to our FAQ.

In order to make changes to your loan receipt letters you will want to go to A**lma Configuration – General – Letters Configuration**. Look for the Loan Receipt Letter and click on the ellipsis to edit your letter. You will notice 3 tabs; one for Labels, a template with the XSL, and one that will have Letter Examples where you can test out changes to the XSL. To target just receipts sent from the 24/7 Lockers, you will write an 'if test' that is looking for which unit checked the material out. The below screenshot will show what statement you can put in to add a message within the loan receipt:

The resulting letter would look like this:

The following items have been loaned from the library at the 24/7 Lockers - Pollak Library

You will be receiving an email shortly from Luxer Lockers with directions on how to pick up your item from the 24/7 Lockers. For any questions regarding the lockers, please visit our 24/7 Lockers page.

Loans:

Pollak Library					
Title	**Author**	**Loan date**	**Due date**	**Library**	**Description**
Edith Hamilton; an intimate portrait.	Reid, Doris Fielding.	09/22/2020	09/21/2021 11:45:00 PM PDT	Pollak Library	

Sincerely
Circulation Department

24/7 Lockers - Pollak Library

LuxerOne Webhook

When setting up your database of users, the option of loading your entire user base into the system. However, we were warned that having all of our patrons loaded (nearly 50,000) would cause delays whenever the lockers would resync. This left us with default option for adding patrons to the Luxer Lockers by manually adding them using the management user interface backend.

The required fields are the Name field, email and Unit. We have been using the Unit as the field where we map the Primary Identifier for the patron. We had asked Luxer if it would be possible to integrate with Alma, like some locker companies, and have patrons loaded automatically as they make physical item requests. We are also interested in possibly having the locker act as a hold shelf and when the item is picked up from the locker the item could then be checked out.

When discussing the methods of how we could accomplish pulling in patron records, it was determined that a webhook could be used when an event like a physical item request was made. When a request is made in Alma it will show up as an event in the Luxer webhook logs. Luxer will grab the user contact details (Primary Identifier) from the request. Luxer than syncs the user details with the locker database and iPad app on the unit.

An integration profile was set up whereby Luxer sends a listener URL to your institution and you provide a secret key to Luxer that can be created/managed using the Developer Network. To add/edit an Integration profile you will need the General System Administrator role. For information about configuring the webhook profile, please visit Integrations with External Systems and find webhook under the Resource Management topics.

The pathway to the Integration Profile List is **Alma Configuration – General – External Systems - Integration Profiles**. Click on **Add Integration Profile** in the top right corner. Give your profile a *Code* and *Name* in the General Information tab. In the Actions tab, it is only required to insert the Webhook listener URL and the secret key that you generated from the Developer Network as well as click on the 'Requests' button.

This is an example of what a request looks like when viewing the webhook log list:

```
{
"id" : "6844728121745425936",
"action" : "REQUEST",
"institution" : {
"value" : "01CALS_FUL",
"desc" : "California State University, Fullerton"
},
"time" : "2020-11-06T05:08:54.457Z",
"event" : {
"value" : "REQUEST_CREATED",
"desc" : "Request created"
},
"user_request" : {
"user_primary_id" : "887809135",
"request_id" : "4315707010002908",
"request_type" : "HOLD",
"request_sub_type" : {
"value" : "PATRON_PHYSICAL",
"desc" : "Patron physical item request"
},
"mms_id" : "991006685309702908",
"title" : "The politics of injustice : the Kennedys, the freedom rides, and the electoral consequences of a moral
```

With this integration all of our active users who make requests will be placed in the locker. With this integration constantly adding/updating patrons, it will be easy to purge the locker recipients list on a regular basis, as an active user will be added immediately back into the database.

If you have any questions, please don't hesitate to reach out to me at kphillips@fullerton.edu or to our programmer David Palmquist at dpalmquist@fullerton.edu.