

Fulfillment Units

Hello, in this session you will learn about Fulfillment Units, Fulfillment rules and the Terms of Use to which they apply.

Alma takes a location-based approach to fulfillment. This means that locations of the same type, for example, open or closed stacks, media, or short term course reserves - are grouped together into a Fulfillment Unit.

If there is an item in a location that doesn't circulate in the same way as the rest of the items in that location, Alma can use an "item policy" rule to define those exceptional circulation policies.

Each fulfillment unit contains rules that are applied in different scenarios.

By creating fulfillment units and creating fulfillment rules that apply to each fulfillment unit, you can be more efficient than if you create separate rules for every location in your library in your institution.

It is our best-practice recommendation, to create fulfillment units on the institution level. This way, your rules will apply on all of the locations of the same type across your entire institution, regardless which library each location belongs to.

Note, that if you have a resource-sharing library, the fulfillment unit and the policies and terms-of-use need to be defined at the library level, because resource-sharing libraries have special functionality that only works with a library-level fulfillment unit.

To configure Fulfillment Units, Go to Alma Configuration, then, make sure you're Configuring your institution. Now go to Fulfillment>Fulfillment Units. You have a distinct Fulfillment Unit for each type of location in your institution. You may Add a new Fulfillment Unit by using the "Add Fulfillment Unit" link, and Edit, Duplicate or Delete a Fulfillment Unit using the row-action menu here.

Let's open the Edit Fulfillment Unit page.

The first tab to open has the Fulfillment Unit Details. This includes the name, which can be changed if you like, and an optional description. The On Shelf Request Policy defines the way in which an item can be requested when it is on the shelf. You can read more about each requesting option in the Knowledge center.

The second tab has the Locations served by this unit. All the locations listed here are part of this fulfillment unit. You can remove or attach an existing location to that list.

Note, that a location can be associated with only one fulfillment unit at a time. Therefore, if you add an existing location to this fulfillment unit, that location will no longer be associated with its previous fulfillment unit.

The last tab on the Edit Fulfillment Unit page has the current Fulfillment Unit Rules. Fulfillment Unit Rules are the key reason fulfillment units exist, so let's discuss them.

Fulfillment Unit rules determine the Terms of Use you apply when delivering a particular fulfillment service to the patron. This is where you add, edit, duplicate and delete the rules that apply to fulfillment scenarios in all locations that are part of this fulfillment unit.

Let's look at an example:

First you choose the rule type to display on the list: Loan, Request or Booking. Let's take a closer look at a Loan's rule.

The Input defines the scenarios that cause this rule to apply- the input can be user group, material type, etc, with various operators, and then the value will populate based on what you've chosen. In our case, the scenario is an undergraduate student who checks out a laptop.

The output parameter is the Terms of use by which this group can loan Laptops.

You can view the terms of use details and policies associated with this terms of use by using this button. All currently available terms of use can be found [here](#).

The Terms of Use and the list of policies are configured in the Terms of Use management page - which can also be reached from [here](#). To learn more about how to configure Terms of Use, search for it in the Knowledge Center.

Alma checks the rules in the order they appear. If the first rule's parameters don't apply on the fulfillment scenario, Alma will continue down the list until it finds a rule that does apply, and then it will stop checking rules.

You can move rules up and down this list, so that more restrictive rules are higher - they will be checked first - and more general rules are lower. If none of the customized rules apply to a fulfillment scenario, then Alma will use the Default rule here. It is our recommendation that the default rule not be loanable to protect material from circulating when no other rules apply.

That was an overview on Fulfillment units and rules.

Thank you for joining!