Alma Administration – Fulfillment
Fulfillment Configuration Utility

Hello, the Fulfillment Configuration Utility allows you to view the fulfillment attributes for loans, requests, and bookings that would take effect for a specified patron, such as loan terms, requests, and fines and fees.

In this session you will how to use the Fulfillment Configuration Utility and how to access Terms of Use and Policies for an individual patron and specific item from the utility.

You need to check due date information for a student who wants to know the due date for an item. To open the utility you’ll go to Fulfillment > Advanced Tools – Loans > Fulfillment Configuration Utility.

You can either look up a specific patron by entering their name or primary identifier, which is what we’ll do in this case since we know who the patron is; or Select from a List. Repeat this process for the Item Barcode. Click OK once you’ve entered both.

Here you can see the Fulfillment Unit Name and Rule as well as the Terms of Use for the item. Also listed is the Due date if the item were to be loaned now. Click on the associated Fulfillment Attribute name to view and edit them. For more information about Fulfillment Units please watch the Fulfillment Units tutorial in the Alma Essentials training sessions in the Knowledge Center.

The student has said he will be on vacation when the item is due and won’t be able to get online to renew it. To see the fine that would be accrued, you can enter the anticipated Return date, and click Calculate Overdue Fine.

Click on the Request tab to view the applicable Fulfillment Attributes for a request for the selected item by this patron. You can click on the names of any of the Fulfillment Attributes to view and edit them.

The Booking tab provides the same information as it applies to a booking request. As before, you can click on the Fulfillment Attributes to view and edit them as needed.

Lastly, the Overdue and Lost Loan Profiles tab lets you view the applicable overdue and lost loan profiles for a given overdue loan.

You now know how to access and use the Fulfillment Configuration Utility. Thanks for watching!