Alma Administration – Fulfillment
Configuring Policies & Terms of Use

Hello, fulfillment in Alma is constructed of policies such as lost and overdue item fines, maximum renewal periods, etc. that can be combined or used individually to create a Terms of Use. Fulfillment Unit Rules determine the Terms of Use to apply when delivering a service to the patron based on the item’s location. Together Policies, Terms of Use, and Fulfillment Unit Rules define the library service attributes and parameters that are applied when a patron uses the library.

In this session you will learn how to configure Policies and Terms of Use.

For more information about Fulfillment Units and Rules please watch the corresponding session in the Alma Essentials training in the Knowledge Center.

You need to create a New Item policy for your institution. First you need to go to the Policy Management page, to do so, you’ll go to Configuration > Fulfillment > Physical Fulfillment > Advanced Policy Configuration. Here you can see a list of all of the current policies.

You can filter the policies by type, using the Policy Type drop-down menu.

To manage an existing policy click on the row action tool. From here you can Edit: to make changes to the policy, Duplicate: to copy it, Delete: to remove it, or Show related terms of use: to view the Terms of Use that use the selected policy.

To create your new policy, click Add Fulfillment Policy. On the first page of the wizard you’ll select the type of policy you are creating. In this case you’re making a new loan policy, so you’ll choose Is Loanable. For a full list of the Fulfillment Policy Types descriptions please visit the Knowledge Center. Click Next after you select the type.

Now you’ll enter a policy Name, and a description if you’d like. In the Value field select the relevant value to indicate that the policy is to be active. Please note that the values of this field vary, depending on the specified policy type.

In the Default Policy field choose whether you want this to be the default policy for this type. Default policies will be the default options in the policy drop-down lists. Click Save when you’re done.

Now you need to configure the Terms of Use to which these policies will apply. In the Configuration menu you’ll go to Fulfillment > Physical Fulfillment > Terms of Use and Policies. This opens the Terms of Use Management page, here you can see a list of all the current Terms of Use. You can filter the Terms of Use by type using the Terms of Use Type drop-down menu.

To manage an existing Terms of Use, click on the row action tool. Click Edit to make any changes. Additionally, if you click Show related fulfillment rules, you can see the Rules that have been connected to that particular Terms of Use and the Fulfillment Units that they apply to. You can see more information about the Rule or Fulfillment Unit by clicking on their titles. Click the back arrow or Back button when you’re done.

To create the new Terms of Use that your policy will be applied to, click Add Terms of Use. You’ll be prompted to select the type of Terms of Use you would like to add. You’re making a new loan Terms of Use so you’ll choose Loan. For more information about the types of Terms of Use please visit the Knowledge Center. Click Next.

On the next screen you’ll name your Terms of Use and give it a description if you’d like. If you had set the policy you just created to default it would be the default selection in this list. Since it was not, you'll select it from the drop-down. Select any remaining policies that you would like to apply. When you’re done, click Next. You’ll see a summary of your new policy… click Save when you’re done.

Your new Terms of Use has now been created, and has the policy you made previously applied to it.

You now know what Policies and Terms of Use are and how they work together and are used in Fulfillment Units, as well as how to create them. For more information about configuring Fulfillment Units please watch the session in the Alma Essentials training in the Knowledge Center.

Thanks for watching!