



Fun with FN and AFN

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Senior Alma Product Manager

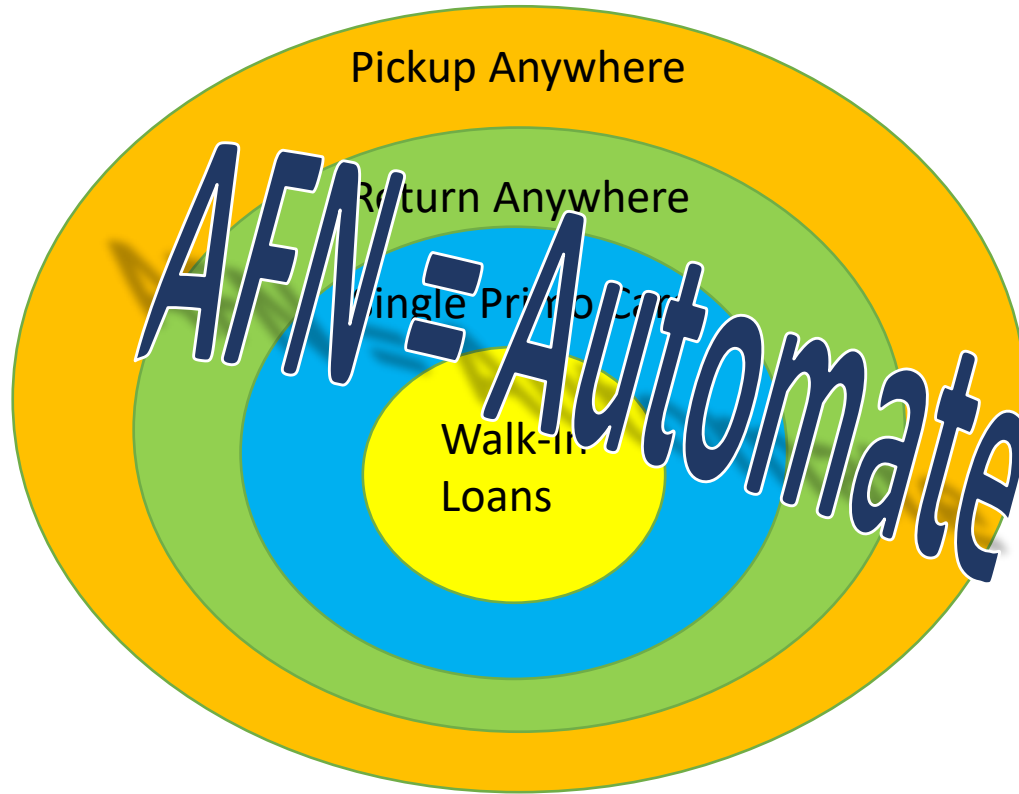


Agenda



- What is (A)FN
- Benefits and value
- Considerations**
- The moving parts
- Demos
- Stats
- Q&A
- (Configuration tips)

Fulfillment Network



FN

The resource may be returned anywhere

The patron directly requests the resource from the remote member institution.



The resource owning library is the patron's service provider.



Request



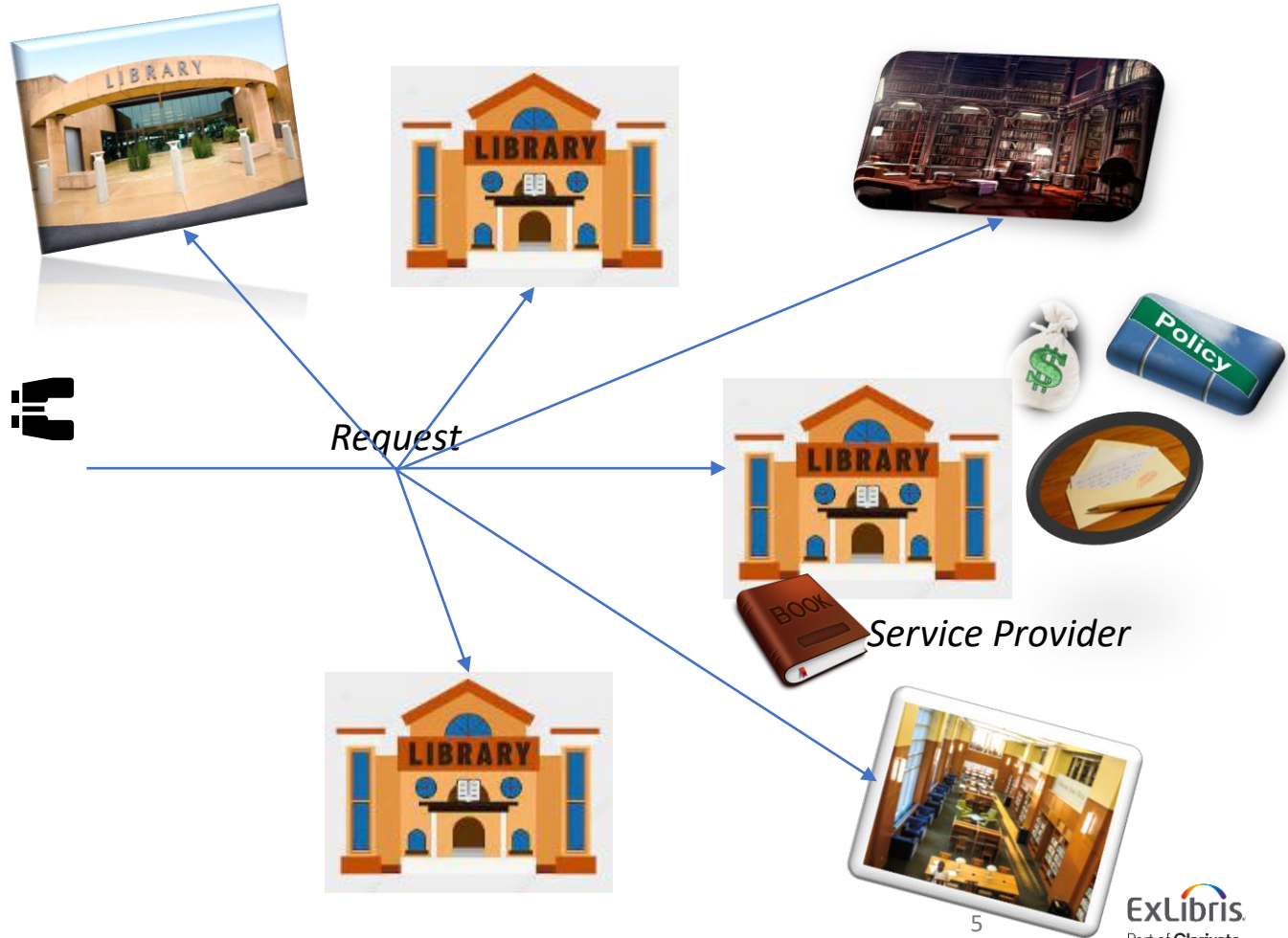
The resource may be picked up anywhere



The resource owning library directly manages all aspects of the loan cycle



AFN



Fulfillment Network – Library & User Value

- Libraries manage **only their own resources**
 - Patrons **directly track and manage** the request and loan – no intermediary
 - Transparency
 - Self serve
 - Direct contact with library
 - **Single workflow** and experience for libraries and patrons
-
- Walk in service
 - Pickup Anywhere
 - Return Anywhere

Fulfillment Network – Library & User Value

The Fulfillment Network

- Lowers the **library involvement** in terms of configuration, maintenance of supplier lists and in terms of staff mediation of the requests.
- The responsibility for obtaining the resources **is on the end user**

The **Automated** Fulfillment Network -

- Lowers the **patron's involvement** in terms of finding and getting the item
- The responsibility for obtaining the resources **is on the library.**

- Libraries manage **only their own resources**
- Patrons **directly track and manage** the request and loan – no intermediary
 - Transparency
 - Self serve
 - Direct contact with library
- **Single workflow** and experience for libraries and patrons
 - Walk in service
 - Pickup Anywhere
 - Return Anywhere

Fulfillment Network – Considerations

- Patron information may be **freely shared** between the institutions of the network, using any of the supported models
 - Linked accounts
 - Consortial ID
 - NZ managed users
- More information on users sharing is [on the CKC](#)
- Institutions should agree on the policies by which their resources will be checked out to different patron types of other institutions
- Shared discovery system



Basic Elements

Network



*User sharing
attributes*



Loan attributes

Request Attributes

Demo



Hybrid Rota

The screenshot shows the ExLibris website interface. At the top left is the ExLibris logo. A navigation bar contains the following links: LIBRARY SEARCH, JOURNAL SEARCH, COLLECTION DISCOVERY, ILL REQUEST, FETCH ITEM, BROWSE, and a menu icon (***). On the right side of the navigation bar, there are icons for a document and a location pin, and the user name "Mashe Shechter" with a dropdown arrow.

Below the navigation bar is a search bar with the placeholder text "Search anything". To the right of the search bar are a microphone icon and a magnifying glass icon. Further right is a link for "ADVANCED SEARCH".

The main content area features two help sections:

- How does this work?**

Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.

Primo also helps you manage your research. Sign-in in order to:

 - Renew books and videos
 - Create favorites lists
 - Export citations to Refworks and Endnote Web
 - View full search results. (Some databases, only show results when you're signed in.)
- Where can I get help?**

[Ask a librarian how to start your search](#)
- Questions? Comments?**

Let us know what you think!



Manual FN

Search anything



ADVANCED SEARCH

How does this work?

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- Create favorites lists
- Export citations to Refworks and Endnote Web
- View full search results. (Some databases, only show results when you're signed in.)

Where can I get help?

[Ask a librarian how to start your search](#)

Questions? Comments?

[Let us know what you think!](#)

Full Process

The screenshot displays the ExLibris website interface. At the top left is the ExLibris logo. A dark blue navigation bar contains the following menu items: LIBRARY SEARCH, JOURNAL SEARCH, COLLECTION DISCOVERY, ILL REQUEST, FETCH ITEM, BROWSE, and a three-dot menu. On the right side of the navigation bar, there is a Primo logo, a user profile icon, and the name Moshe Shechter with a dropdown arrow. Below the navigation bar is a white search bar with the placeholder text "Search anything". To the right of the search bar are a microphone icon, a magnifying glass icon, and the text "ADVANCED SEARCH".

Below the search bar, the page is divided into two main help sections:

- How does this work?**

Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.

Primo also helps you manage your research. Sign-in in order to:

 - Renew books and videos
 - Create favorites lists
 - Export citations to Refworks and Endnote Web
 - View full search results. (Some databases, only show results when you're signed in.)
- Where can I get help?**

Ask a librarian how to start your search

Below these sections is a "Questions? Comments?" section with the text "Let us know what you think!".

In the bottom right corner of the page, there is a blue circular icon containing a white exclamation mark.



Statistics

Some Stats

This report is showing cumulative data up to date as of May 2022

Region	Num. Loans with patron linked from another institution	Num. Loans with patron not linked from another institution	% Loans with patron linked from another institution
AP	20,261	62,110,851	0.03%
CA	32,131	6,718,783	0.48%
CN	0	5,466,574	0.00%
EU	205,033	169,399,719	0.12%
NA	204,144	138,333,139	0.15%
Grand Total	461,569	382,029,066	0.12%

Institution Type	Num. Loans with patron linked from another institution
Member	408,422
Network	0
Standalone	53,147
Grand Total	461,569



Some Stats

Catalog Home Catalog Favorites Dashboards Create

Location /Shared Folders/Community/Reports/Shared Reports/Reports/Fulfillment - Fulfillment Network

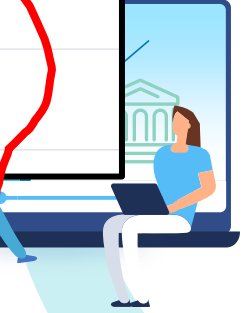
Folders: EBOOK Ce, Electronic, Esploro, Events, Fines and, **Fulfillme**

Type All Sort Name A-Z

- Loans by guest patrons per library** | Last Mod
 - This report retrieves information about locally owned it
 - Open Edit More
- Local items loaned at another institution** | L
 - This report retrieves statistics about locally owned item
 - Open Edit More
- Requests by source (AFN/Manual) and picku**
 - Open Edit More

Loan Date	Loans	Loans from Hold Request	Recalls	Renewals	Lost	Claimed Retu
2022-Q3	20	20	0	0	0	
Total	20	20	0	0	0	
2022-Q2	985	861	0	0	0	
Total	985	861	0	0	4	
2022-Q1	1,544	1,466	1	0	49	
Total	1,544	1,466	1	0	49	
2021-Q4	1,342	1,208	0	0	43	
Total	1,342	1,208	0	0	43	

Request Date	Request Source	Pickup Location Type	Requests
2022-Q3	AFN	Local Institution	15
		Local Institution Total	15
		Other Institution	8
		Other Institution Total	8
		AFN Total	23
2022-Q2	AFN	Local Institution	27
		Local Institution Total	27
		Other Institution	992
		Other Institution Total	992
		AFN Total	1,837
2022-Q2	Manual	Local Institution	8,250
		Local Institution Total	8,250
		Other Institution	60
		Other Institution Total	60
		Manual Total	8,310





Q&A

Q&A

- Q : Can fulfillment networks be set up only based on common NZ?
 - No. As long as both are Alma institutions (😊), they don't require to share NZ or a shared Primo
- Q : Can institutions use a FN when some are using Primo VE and some using Primo classic ?
 - Yes. My Account can retrieve information across Primo types. Some setup is required in the classic Primos. Direct request does depend on having the same system

Q&A

- Q : Can FN be set across multiple data centers ?
 - There are some optimizations to same instance partners, but it is not mandatory.

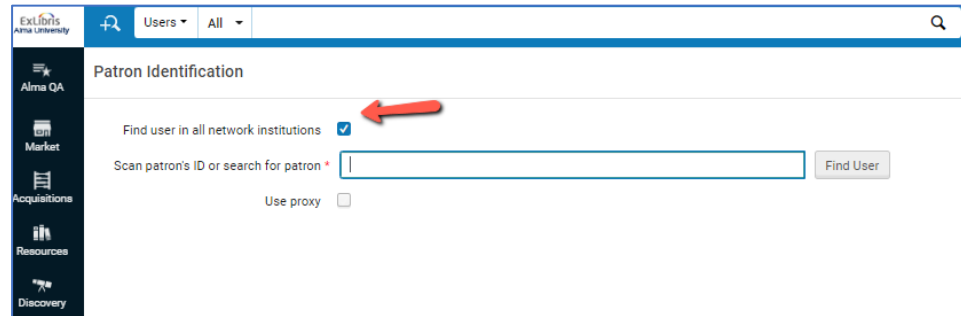
Q&A

- Q : Can blocks be shared across the network ?
 - Patron blocks can be defined as ‘consortial’. When such blocks are placed on a patron record in institution A, the patron account will be blocked also in institution B. Technically, the block is copied from institution A to B. The block will be removed from institution B when it is removed at institution A.
 - The above description works with explicit block records that are either manually or automatically (such as because of overdue loans) attached to a patron record. It does not work with calculated blocks, such as patron limits. These blocks are handled at each institution independently from the other.

Q&A

- Q : Can a consortially unique IDs be used at the circulation desk ?
 - network_users_unique_identifiers - FULL - Identifiers are unique across all members of the fulfillment network and are not duplicated.

In Manage Patron Services a ‘Find user in all network institutions’ check box will cause Alma to search for the ID first in the local institution and if not found then in all other participating institutions. Alma will automatically find the user record at any of the network institutions and pull its information from its institution.

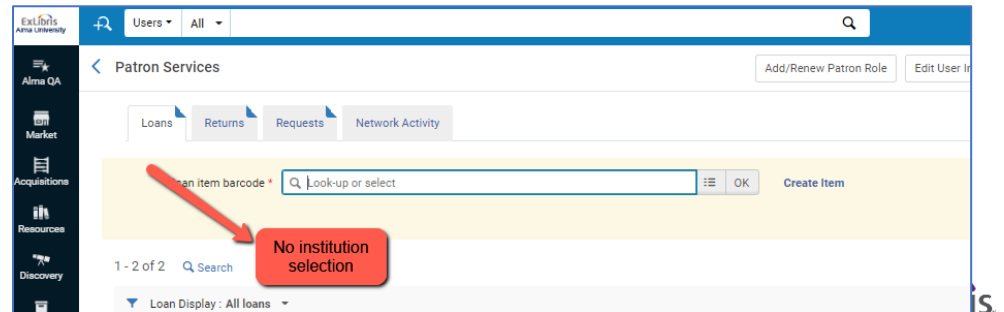


The screenshot shows the Alma Patron Identification interface. At the top, there is a search bar with 'Users' and 'All' dropdown menus. Below that, the 'Patron Identification' section contains a checkbox labeled 'Find user in all network institutions' which is checked. A red arrow points to this checkbox. Below the checkbox is a search input field labeled 'Scan patron's ID or search for patron' and a 'Find User' button. At the bottom of the section, there is an unchecked checkbox labeled 'Use proxy'.

Q&A

- Q : Can a consortially unique item barcodes be used at the circulation desk ?
 - fulfillment_network_unique_barcodes - FULL - Barcodes are unique across all members of the fulfillment network and are not duplicated.

The Item Owner drop-down list does not appear on the Manage Patron Services, Return Items, or Scan In pages. Alma searches for the barcode, first locally, then in all other institutions. The search completes as soon as the barcode is matched and processing continues automatically.



Q&A

- Q : How does patron authentication work in a Fulfillment Network ?
 - Linked accounts are not relevant for authentication purposes. Primo must always know which Alma IZ to direct the authentication process to, and that chosen institution must have the account already existent in its user management.
 - An exception to that is where NZ managed users exist and the login is SAML based. In that case the user account does not have to preexist in the institution.

behind the iron curtain



ExLibris University Consortium








All Libraries



ADVANCED SEARCH

 0 selected PAGE 1 92 Results [Save query](#)

Tweak your results

-  **BOOK**
Behind the iron curtain
Moorad, George
2013
[Check for available services](#)
-  **BOOK**
Behind the iron curtain
Poddebski, Karol.; Belloc, Hilaire, 1870-1953, former owner.
1946
[Out of library](#)
-  **BOOK**
Subversive Adaptations Czech Literature on Screen behind the Iron Curtain
Bubeníček, Petr. author.
2017
[Available Online](#)
-  **BOOK**
Daily life behind the Iron Curtain
Willis, Jim, 1946 Mar. 19-
2013
[Available Online](#)
-  **BOOK**
Vatican II Behind the Iron Curtain
Kosicki, Piotr H., 1983- editor.
2016
[Available Online](#)
-  **BOOK**
Behind the Iron Curtain; the Soviet satellite states: East European nationalisms and education
Rouček, Joseph S. (Joseph Slabey), 1902-1984.
1964
[Check for available services](#)
-  **BOOK**
Red star over Poland, a report from behind the iron curtain
Kerstein, Edward S., 1911-
1947
[Check for available services](#)

Sort by Relevance

Availability

Available online

Held by library

Resource Type

Subject

Creation Date

Author/Creator

Library

Other Libraries

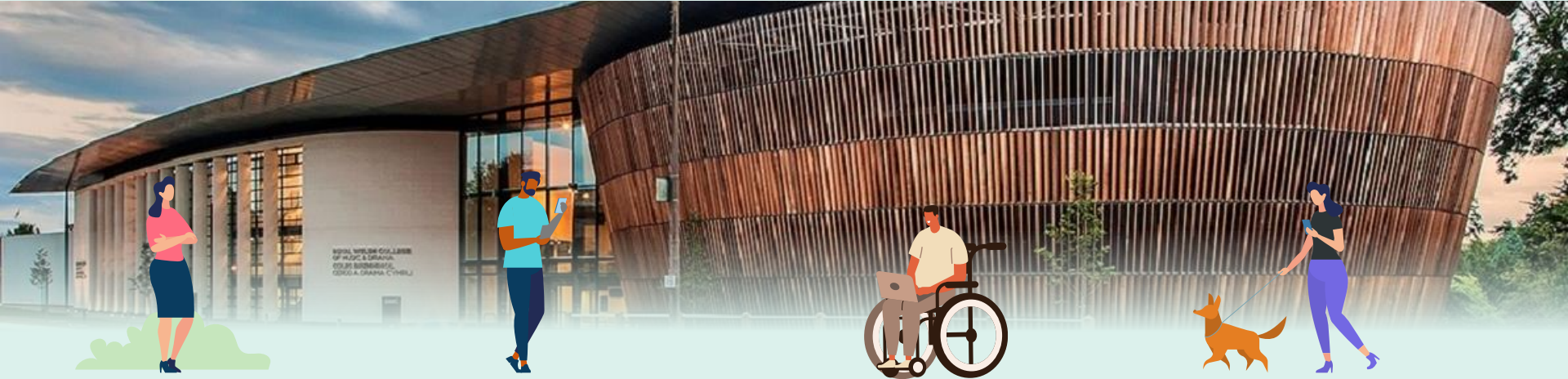
Location

Institution

Language

Donor Note

Local Institution field



Thank you!

Moshe.shechter@clarivate.com





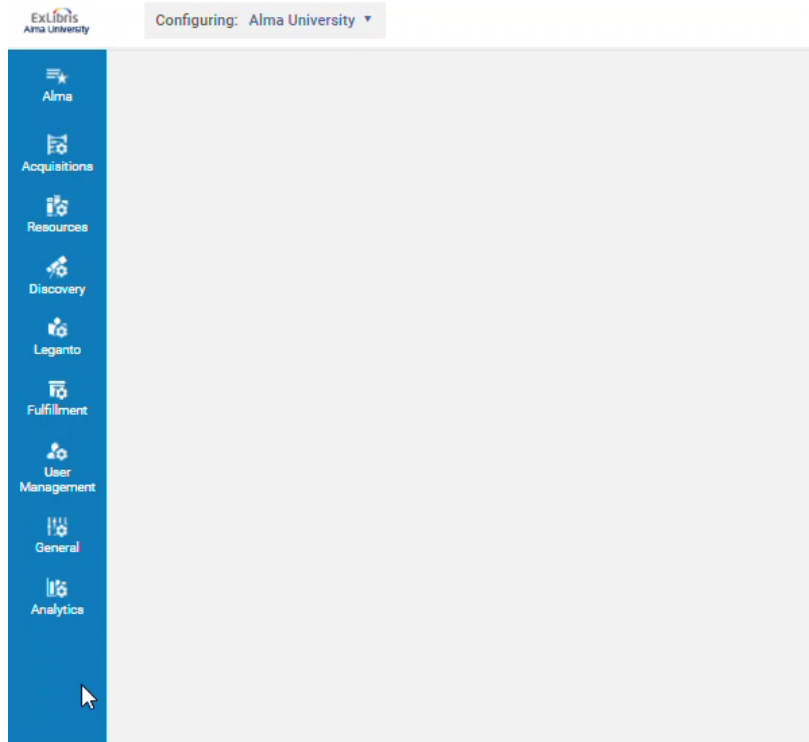
Configurations



The Network

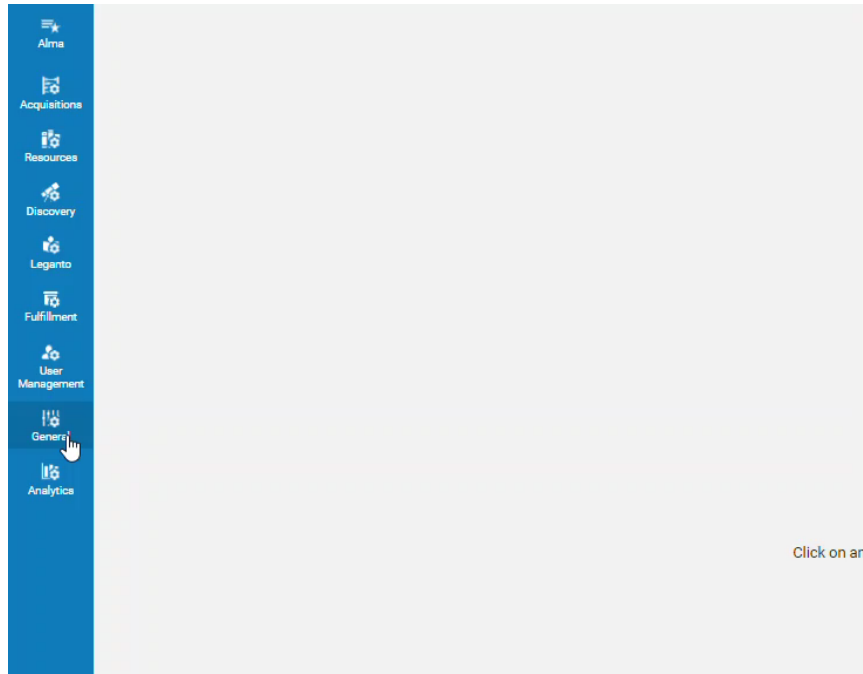
The Network

Shared password



The Network

Members (non NZ members)




The Network

Members (NZ members)

Ex Libris
members

Configuring: Ex Libris University Consortium ▾

- Alma
- Acquisitions
- Resources
- Discovery
- Leganto
- Fulfillment
- User Management
- General
- Analytics



Configuration dashboard

Click on any link from the configuration menu on the left to start working.

The Network

Testing the setup

The screenshot displays the Ex Libris Alma library management interface. On the left is a dark sidebar with navigation icons for Alma, Market, Acquisitions, Resources, Discovery, Fulfillment (highlighted), Admin, and Analytics. The top header is blue and contains search filters for 'Physical Items' and 'Keywords', a home icon, a search icon, a shopping cart icon with a notification, and 'Main Libre Circulation'. The main content area shows a welcome message for 'Ex Libris Staff' dated '06/29/2022'. Below this are breadcrumb links for 'Recent Pages', 'Labels' (with a sub-link for 'Discovery'), and 'Borrowing Requests' (with a sub-link for 'Fulfillment'). A 'Notifications' panel on the right lists three items from 2018, each with a date and a link icon.

Ex Libris
Alma Library

Physical Items | Keywords

Home | Search | Main Libre Circulation

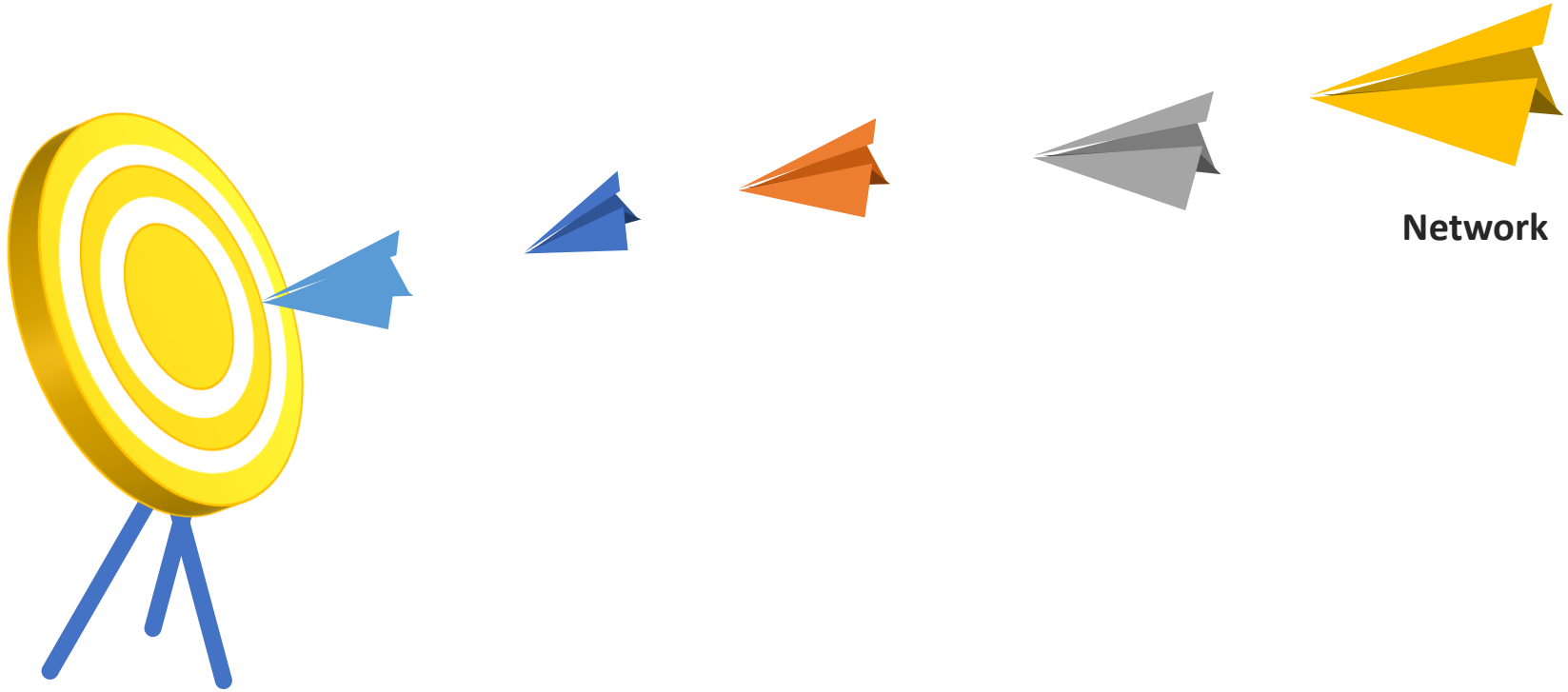
Welcome, Ex Libris Staff 06/29/2022

Recent Pages > Labels > Borrowing Requests
Discovery Fulfillment

Notifications

2018	We hope you enjoy your Alma experience	04/05/2018
2018	Go to Discoveralma.com to learn more about Alma	04/05/2018
2018	See and learn more about Ex Libris on YouTube	04/05/2018

Configuration Steps





The Shared Users

Linked Account Rules

How accounts are copied **to** your institution from another institution.

This configuration option maps the values of the linked account that is created in your institution.

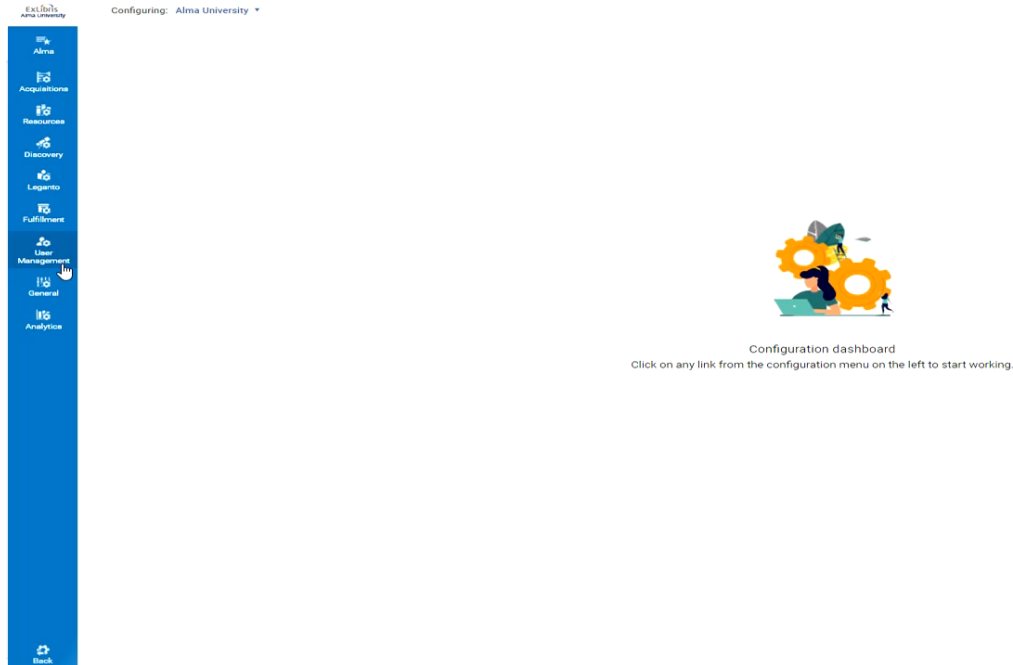


The screenshot shows the ExLibris configuration interface for Alma University. On the left is a vertical blue navigation menu with the following items: Alma, Acquisitions, Resources, Discovery, Leganto, Fulfillment, User Management, General, Analytics, and a Back button at the bottom. The main content area is titled "Configuring: Alma University" and features a central illustration of a person working with large yellow gears. Below the illustration, the text reads "Configuration dashboard" and "Click on any link from the configuration menu on the left to start working."

Linked Account Shared Fields

Control what fields from **your** patron records are copied over to **another** institution.

It enables you to protect the privacy of your patrons.



ExLibris
Alma University

Configuring: Alma University

- Alma
- Acquisitions
- Resources
- Discovery
- Leganto
- Fulfillment
- User Management
- General
- Analytics

Configuration dashboard

Click on any link from the configuration menu on the left to start working.

Restricted Users

Determine which **of your** user groups are hidden from other institutions in a fulfillment network. Effectively,

t r

ExLibris
Alma University

Configuring: Alma University ▾

Alma

Acquisitions

Resources

Discovery

Leganto


Fulfillment

User Management

General

Analytics

Back



Configuration dashboard

Click on any link from the configuration menu on the left to start working.

Profile icon ?

Consortially Unique Identifiers

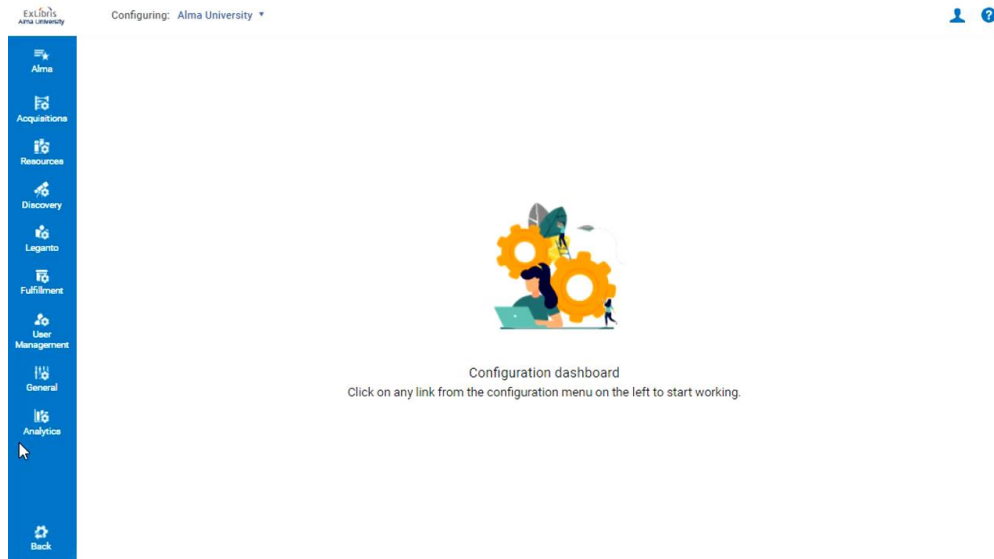
When patrons approach a desk in your library, there is no need to first select their source institution before scanning in their ID. By only scanning in their ID, Alma finds the correct record in whatever institution in the network and pulls the user record.

The image shows a screenshot of the Alma Patron Identification interface. It is divided into two main sections. The top section, titled "Patron Identification", has a checked checkbox for "Find user in other institution". Below this, there is a search box labeled "Institution" with a magnifying glass icon and the text "Look-up or select". A dropdown menu is open below the search box, showing two options: "Open University" and "University of Knowledge". To the left of the search box, there is a label "Scan patron's ID or search for patron *". Below the search box, there is a "Use proxy" checkbox which is unchecked. A blue arrow points from the search box area to the bottom section. The bottom section has a checked checkbox for "Find user in all network institutions". Below this, there is a search box labeled "Scan patron's ID or search for patron *". To the right of the search box is a "Find User" button. Below the search box, there is a "Use proxy" checkbox which is unchecked.

Searchable Identifiers

Only patrons that are granted the ID types configured in this table can get fulfillment network services, and only by using the IDs of the types configured here when identifying at the circulation desk of a remote library.

- A typical use case is where not all patrons are eligible for fulfillment network services



The screenshot shows the ExLibris Alma University configuration interface. At the top left, it says "EXLIBRIS Alma University" and "Configuring: Alma University". On the right, there are user and help icons. A blue sidebar on the left contains a navigation menu with the following items: Alma, Acquisitions, Resources, Discovery, Leganto, Fulfillment, User Management, General, Analytics, and Back. The main content area features a central illustration of a person working with large yellow gears and a satellite dish. Below the illustration, the text reads "Configuration dashboard" and "Click on any link from the configuration menu on the left to start working."

The Shared Users

Testing the setup

The screenshot shows the ExLibris Open Library interface. The top navigation bar includes the ExLibris logo, search filters for 'Physical titles' and 'Keywords', and the user's role 'Central Library - Default Circulation Desk'. The main content area is titled 'User Details' and features a 'Toggle Account Type' button, 'Cancel', and 'Save' buttons. The user information is organized into three sections: 'User Information', 'User Management Information', and 'User Roles'. The 'User Information' section contains fields for personal and professional details, while 'User Management Information' includes password management options. The 'User Roles' section shows a list of roles with a filter set to 'all'. A right-hand sidebar displays the user's profile 'Lawson, Ellen' and various system-related details.

User Information

First name *	Ellen	Middle name	
Last name *	Lawson	Preferred first name	
Preferred middle name		Preferred last name	
Primary identifier *	OU100	Title	
PIN number	<input type="text"/> <input type="button" value="Generate"/>	Job category	Please select a value
Job description		Gender	
User group	Please select a value	Campus	
Website URL		Preferred language	English
Status	Active	Status date	28/10/2013
Birth date	<input type="text"/>	Expiration date	<input type="text"/>
Purge date	<input type="text"/>	Resource sharing library	
Purchase request library			<input type="button" value="Selected Patron Letters"/>
Send message	General mail		<input type="button" value="Compose"/>

User Management Information

Password
Verify password
Force password change on next login	<input type="checkbox"/>
Disable all login restrictions	<input type="checkbox"/>

User Roles

1 - 1 of 1

Filter: all

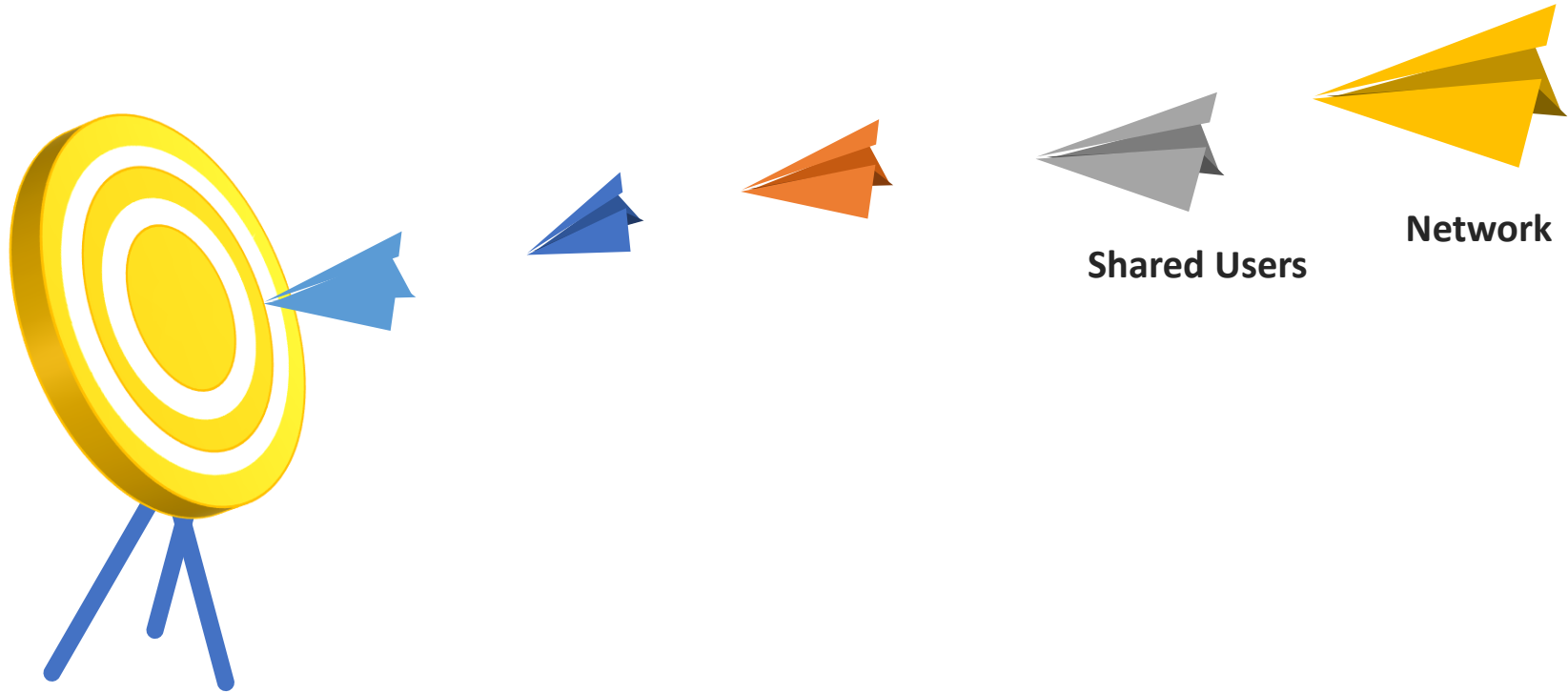
Right Sidebar:

Lawson, Ellen

ID: OU100
Record type: Public
Account Type: Internal
User group: -
Identity Service: Not Used
[Manage fulfillment activities](#)

ExLibris
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Configuration Steps



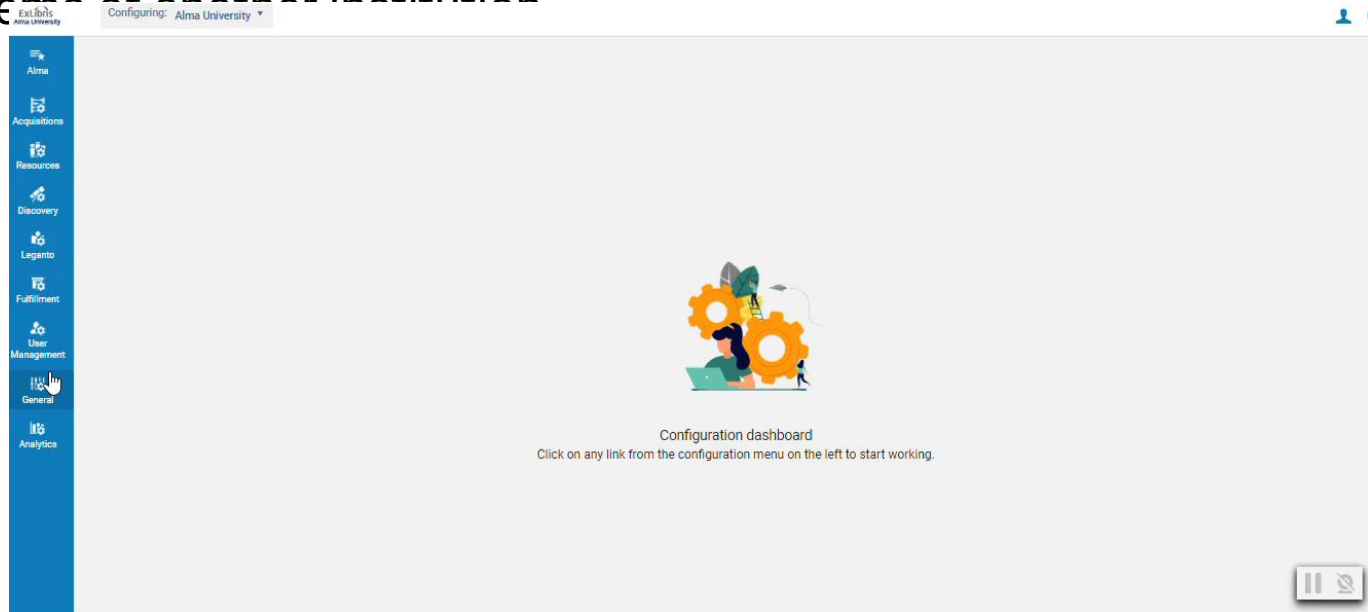


Loan Attributes

Library Relations

Institution relations determine:

- Which institution can potentially deliver items to which other institution
- Which institution can potentially circulate (check in\out) items of another institution



The screenshot shows the ExLibris Alma University configuration dashboard. At the top left, it says "ExLibris ALMA UNIVERSITY" and "Configuring: Alma University". A blue sidebar on the left contains a navigation menu with the following items: Alma, Acquisitions, Resources, Discovery, Leganto, Fulfillment, User Management, General (highlighted with a mouse cursor), and Analytics. The main content area is light gray and features a central illustration of a person working at a laptop with gears and a rocket. Below the illustration, the text reads "Configuration dashboard" and "Click on any link from the configuration menu on the left to start working." In the bottom right corner, there is a small gray button with a pause icon and a close icon.

Library Serves Other Institutions

Libraries can check out\in items from libraries of other institutions only if they are set as libraries that serve other institutions.

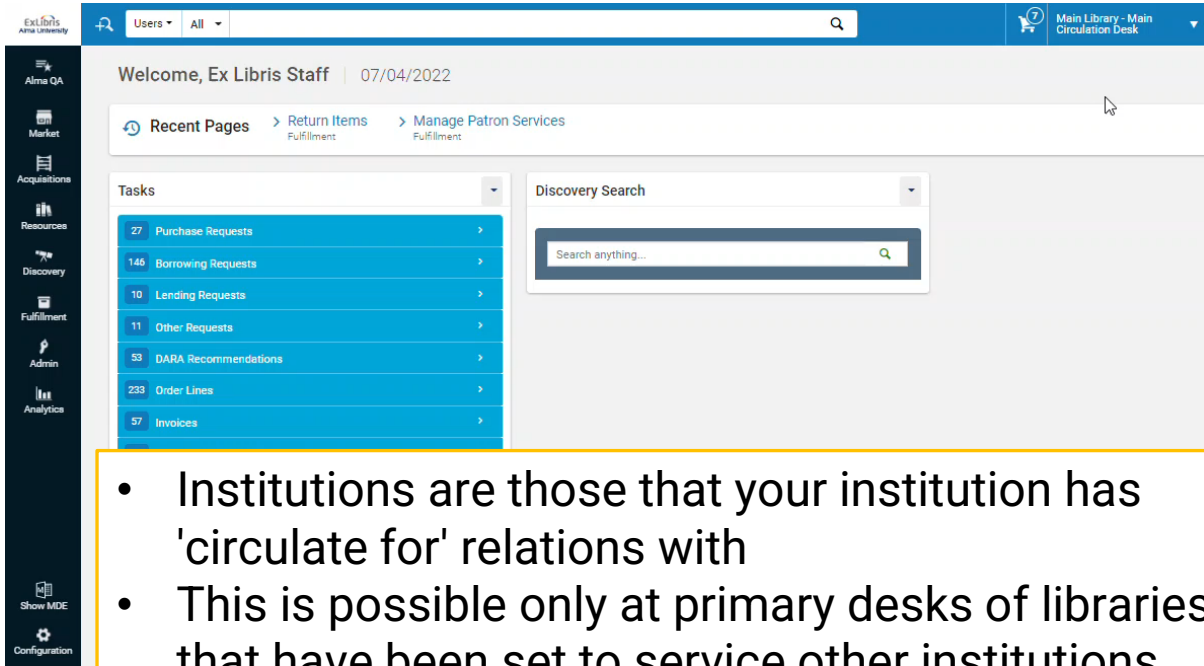
The image shows a screenshot of the ExLibris Alma University configuration dashboard. The dashboard has a blue sidebar on the left with various menu items: Alma, Acquisitions, Resources, Discovery, Leganto, Fulfillment, User Management, General, and Analytics. The main content area is titled 'Configuring: Alma University' and features a 'Configuration dashboard' section with a gear icon and the text 'Click on any link from the configuration menu on the left'. A dialog box titled 'Manage Item Returns' is overlaid on the dashboard. The dialog box contains the following fields and options:

- 'Item owner *' dropdown menu with 'My institution' selected.
- 'Place directly on hold shelf' radio buttons with 'Yes' selected and 'No' unselected.
- 'Scan item barcode *' search field with 'Look-up or select' text and an 'OK' button.

The 'Item owner *' dropdown menu is highlighted with a yellow border. The 'OK' button is also highlighted with a blue border.

Loan Attributes

Testing the setup



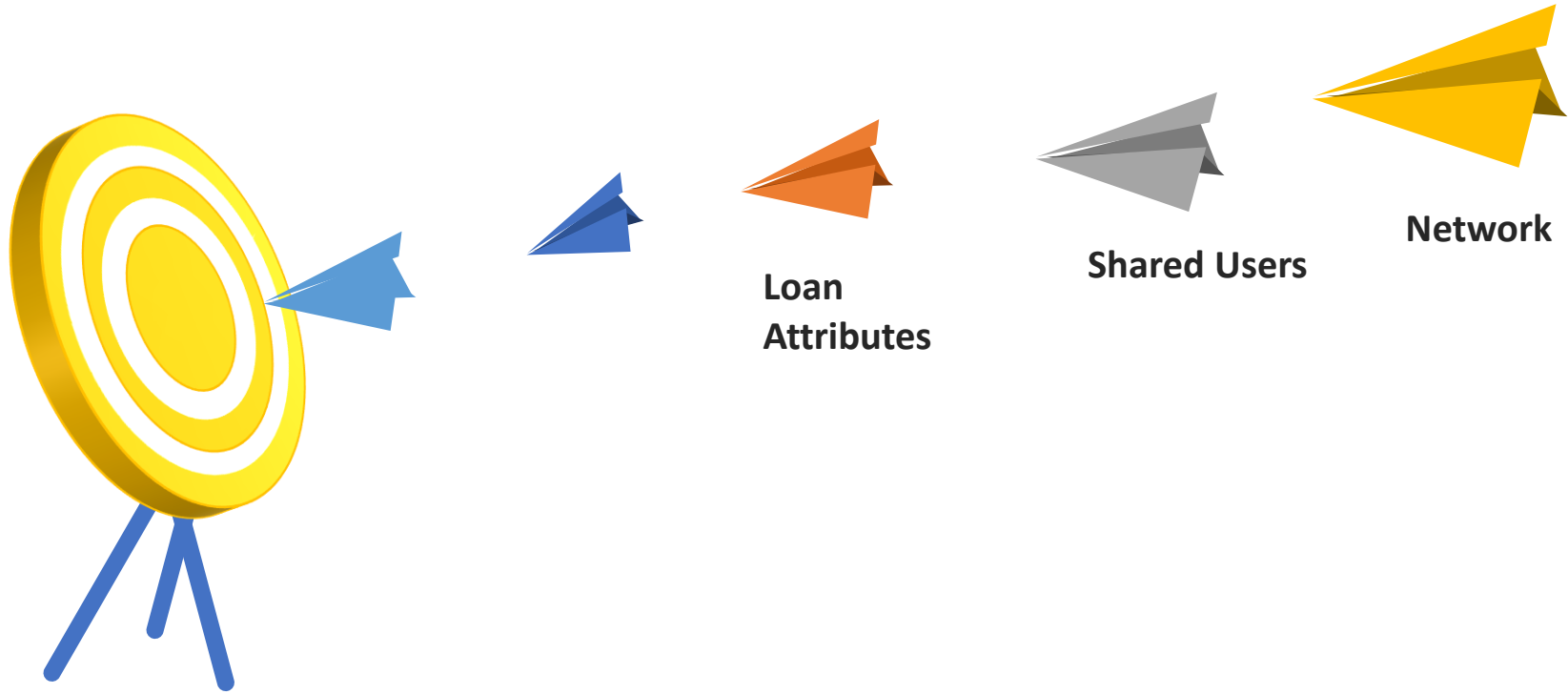
The screenshot displays the Ex Libris Alma QA interface. At the top, there is a navigation bar with 'Users' and 'All' dropdown menus, a search icon, and a 'Main Library - Main Circulation Desk' dropdown. Below this, a welcome message reads 'Welcome, Ex Libris Staff | 07/04/2022'. A breadcrumb trail shows 'Recent Pages > Return Items Fulfillment > Manage Patron Services Fulfillment'. The main content area features a 'Tasks' list on the left and a 'Discovery Search' box on the right. The 'Tasks' list includes:

Count	Task Name	Action
27	Purchase Requests	>
146	Borrowing Requests	>
10	Lending Requests	>
11	Other Requests	>
53	DARA Recommendations	>
233	Order Lines	>
57	Invoices	>

The 'Discovery Search' box contains a search input field with the placeholder text 'Search anything...' and a search icon.

- Institutions are those that your institution has 'circulate for' relations with
- This is possible only at primary desks of libraries that have been set to service other institutions

Configuration Steps





Request Attributes

Request Attributes

- To be able to request an item for pickup at another institution, the item's request policy must have the Pickup Location Policy set to **At Any Institution**

Policy Management

1 - 7 of 7

Policy Type : Pickup Locations

Policy Type	Policy Name	Value
1 Pickup Locations	Any institution	At Any Institution
2 Pickup Locations	Anywhere	In Institution
3 Pickup Locations	Pickup In Campus	In Campus

Request Attributes

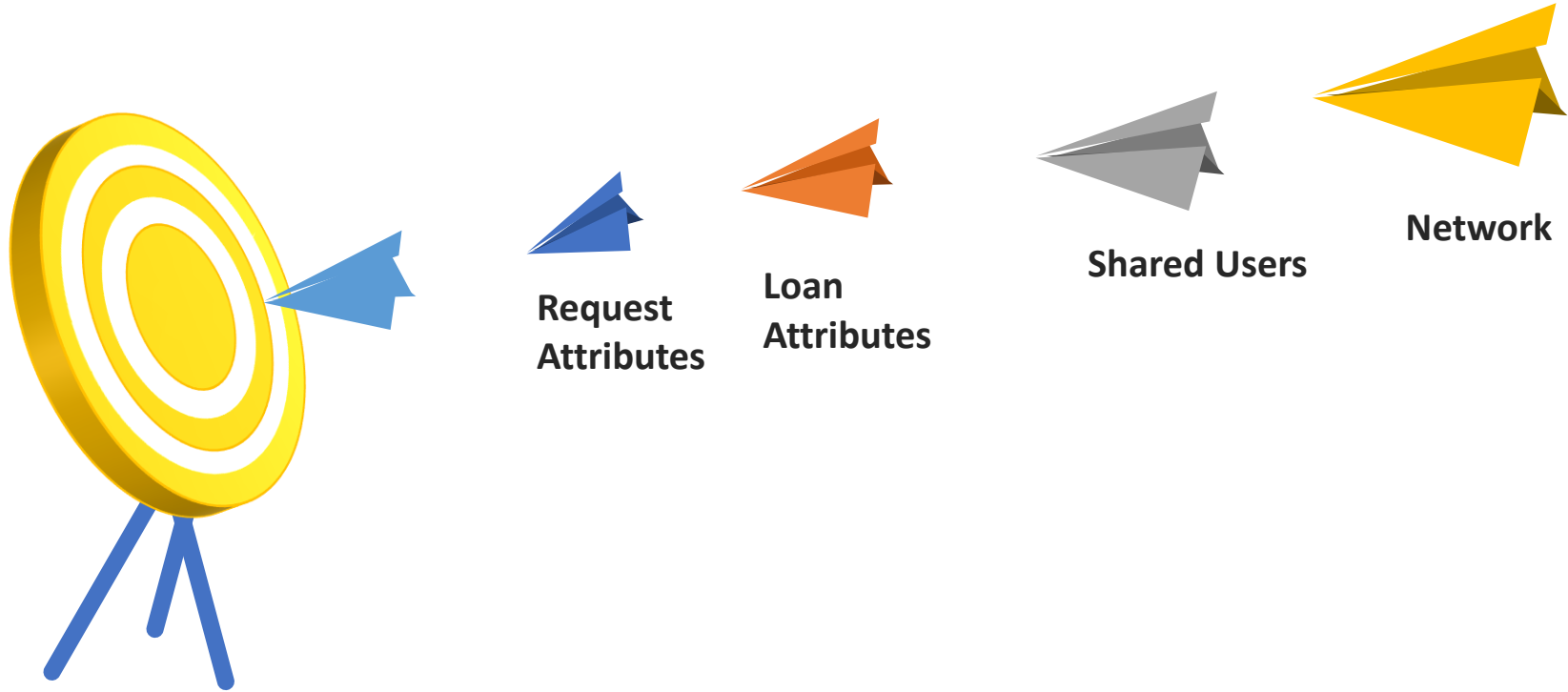
- Testing the setup

The screenshot shows a 'Create Request' form with the following fields and values:

- Request Type ***: Patron physical item request
- Requester ***: Staff, Ex Libris
- Note**: (Empty text area)
- Pickup Institution ***: Other Institutions: Alma University
- Pickup At ***: Look-up or select (dropdown menu open showing options: The Main Campus, Alma University - Main Library)

A red rectangular box highlights the 'Pickup Institution' and 'Pickup At' fields and their respective dropdown menus.

Configuration Steps

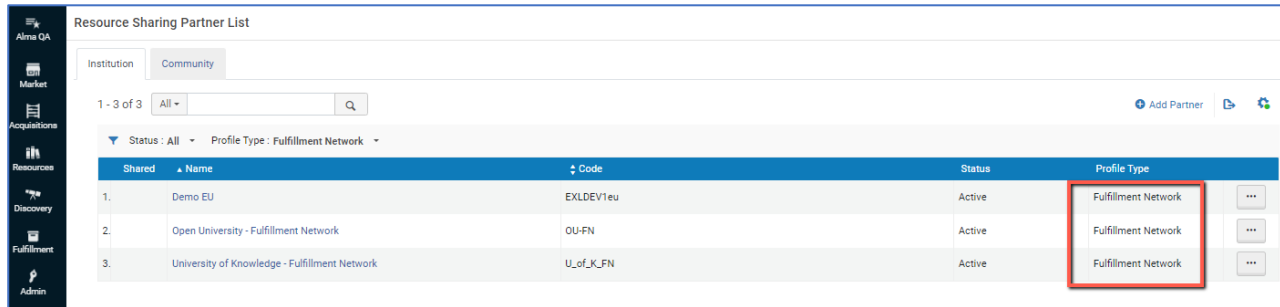




AFN

AFN

- Once we have a working FN all we need to make this an AFN is partners with a 'profile type' of 'Fulfillment Network'



Resource Sharing Partner List

Institution Community

1 - 3 of 3 All

Add Partner

Status: All Profile Type: Fulfillment Network

Shared	Name	Code	Status	Profile Type
1.	Demo EU	EXLDEV1eu	Active	Fulfillment Network
2.	Open University - Fulfillment Network	OU-FN	Active	Fulfillment Network
3.	University of Knowledge - Fulfillment Network	U_of_KFN	Active	Fulfillment Network

AFN

- Testing the setup

Resource Sharing Borrowing Request

Additional person name

Series title number

Note

Part

Chapter author

Pages

End page

Request Attributes

Specific Edition Only

Requester *

Labels

Request Status

Requested Media

Preferred Send Method

Date Needed By

Preferred Pickup Institution

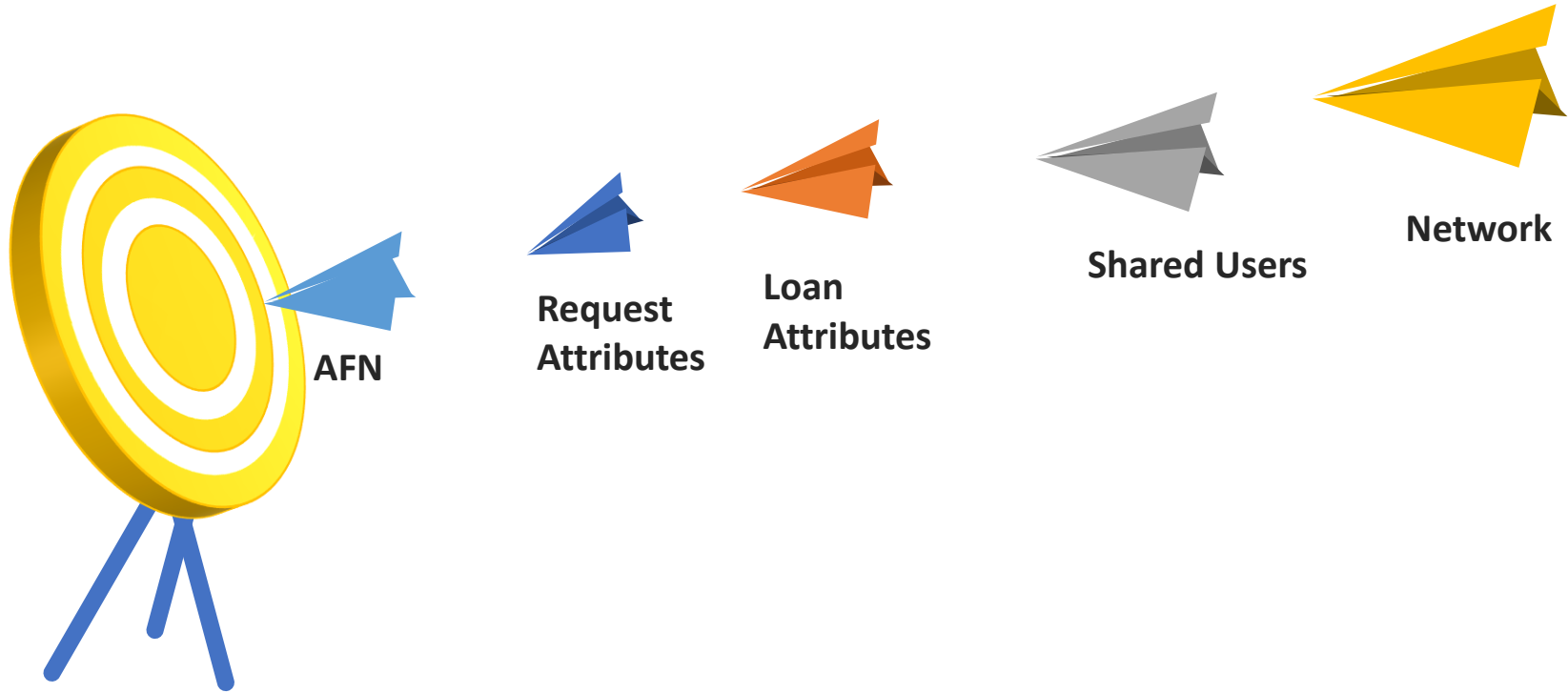
Preferred Local Pickup Location *

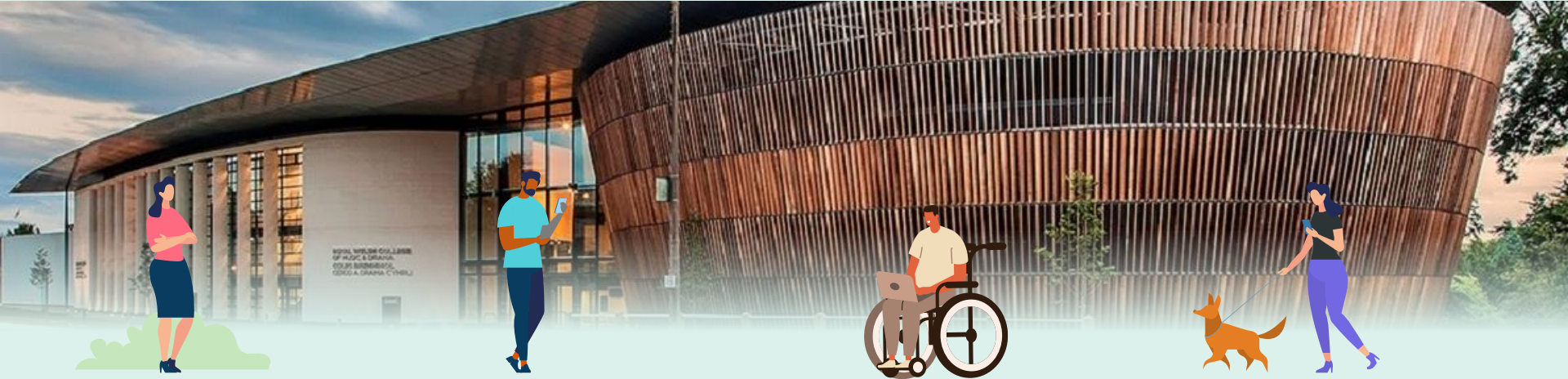
For Reading-Room Use Only

Willing to Pay

Needs patron information

Configuration Steps





Thank you!

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