Fun with FN and AFN

Moshe Shechter

Senior Alma Product Manager

IGELU Conference
12th -15th September 2022

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Agenda

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

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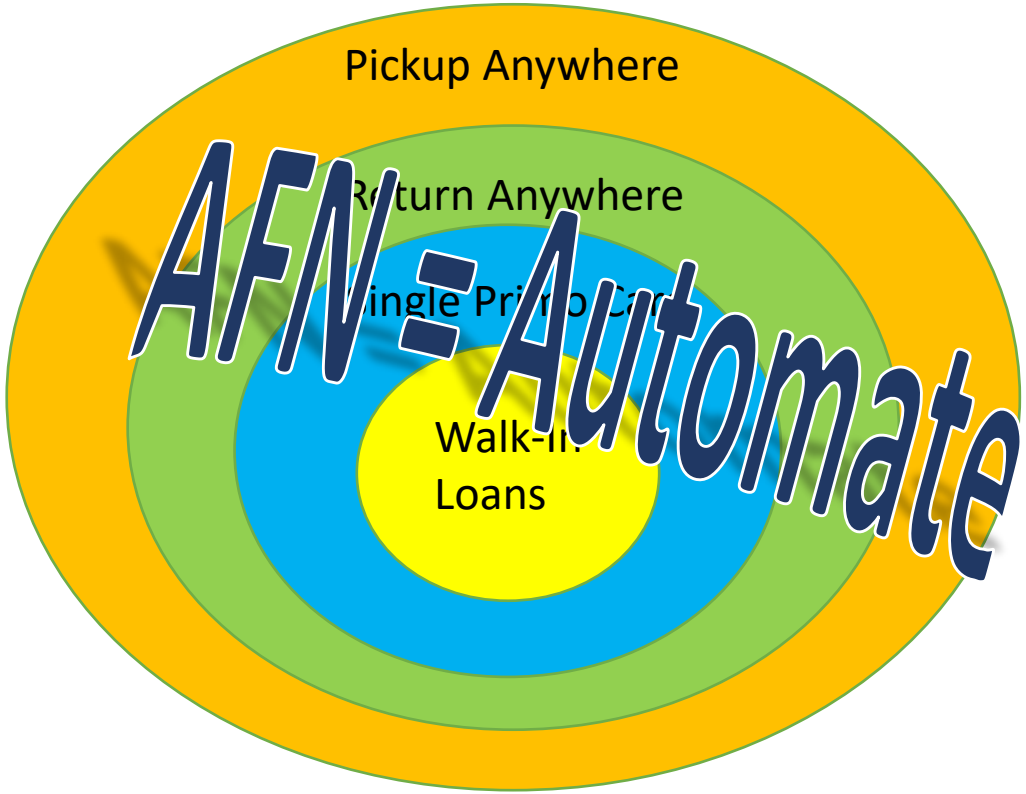
Fulfillment Network



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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 owning library directly manages all aspects of the loan cycle

The resource may be picked up anywhere

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Request

Service Provider

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Fulfillment Network – Library & User Value

- Libraries manage **only their own resources**
- Patrons **directly track and manage** the request and loan – no mediary
  - Transparency
  - Self serve
  - Direct contact with library
- **Single workflow** and experience for libraries and patrons

- Walk in service
- Pickup Anywhere
- Return Anywhere

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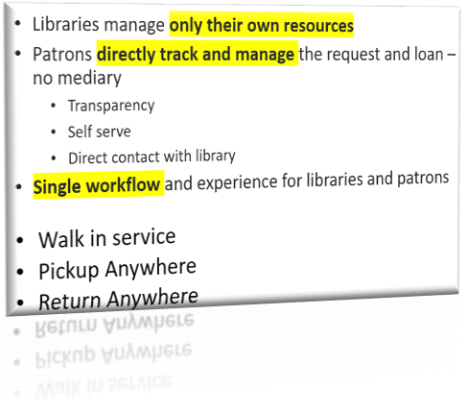
Fulfillment Network – Library & User Value

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.**



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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

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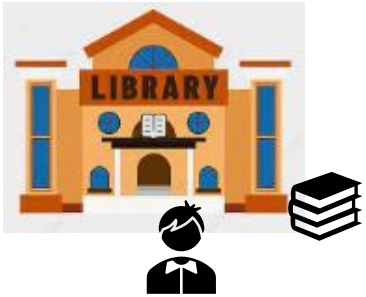
Basic Elements

Network

User sharing attributes



Loan attributes

Request Attributes

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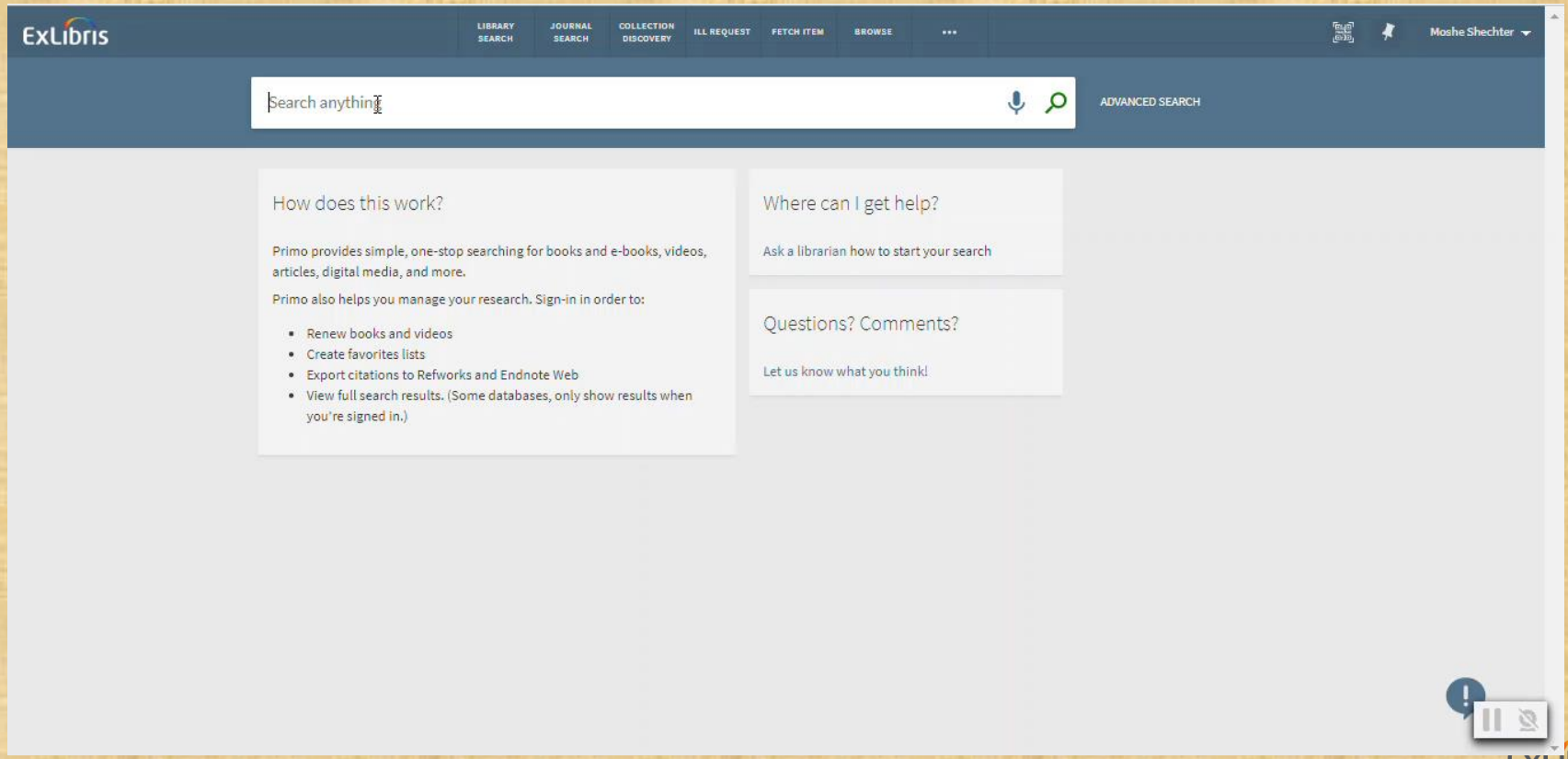
Hybrid Rota



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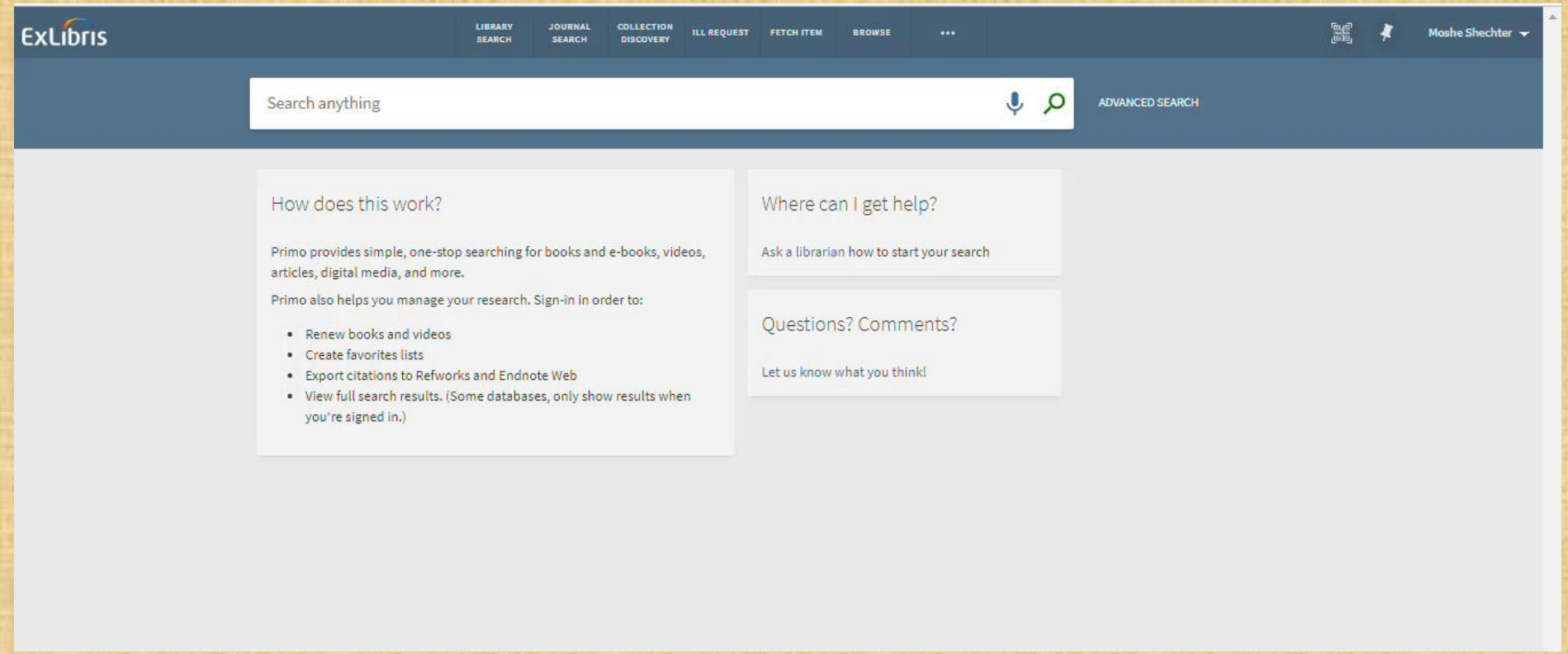
Manual FN



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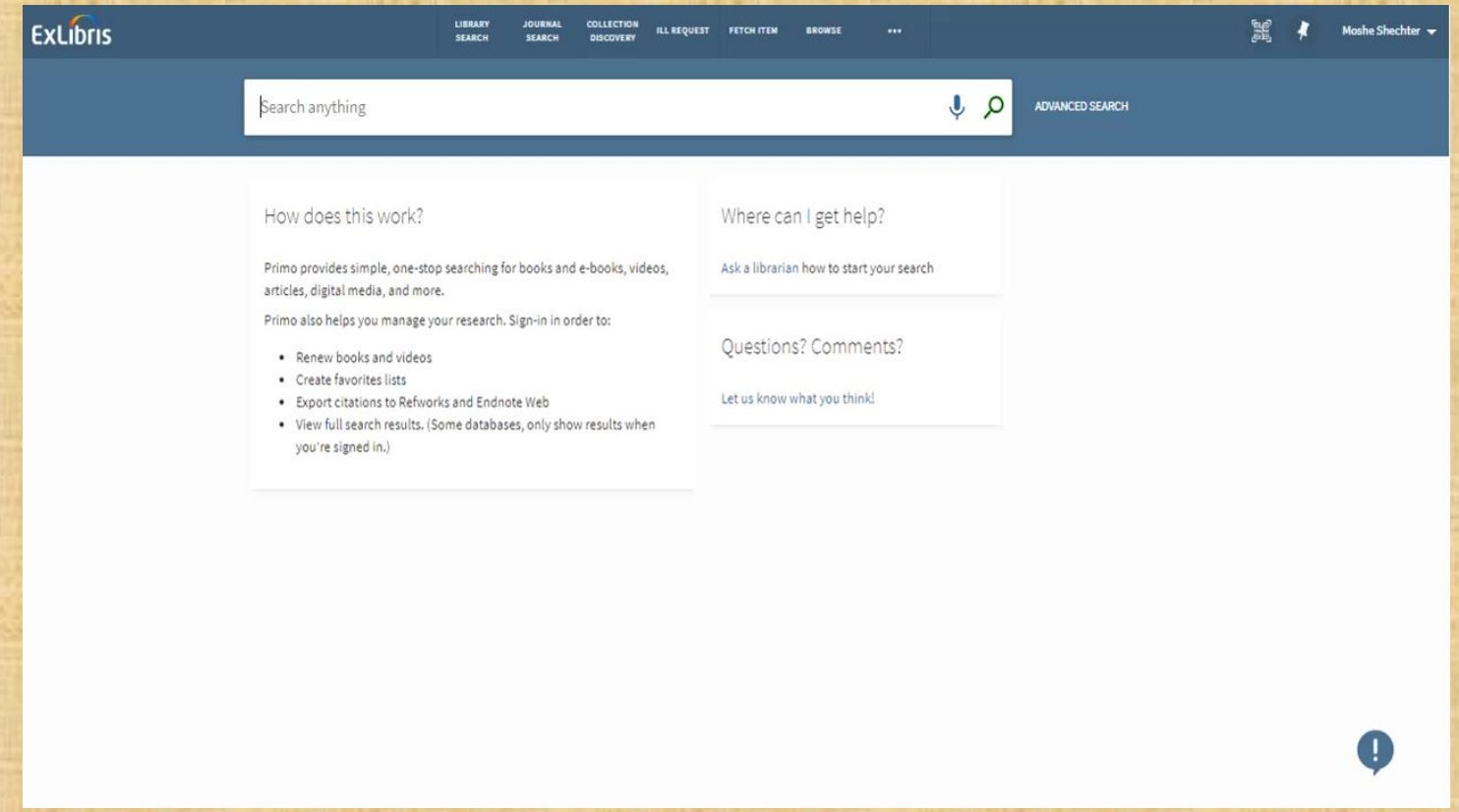
Full Process



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Statistics

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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**

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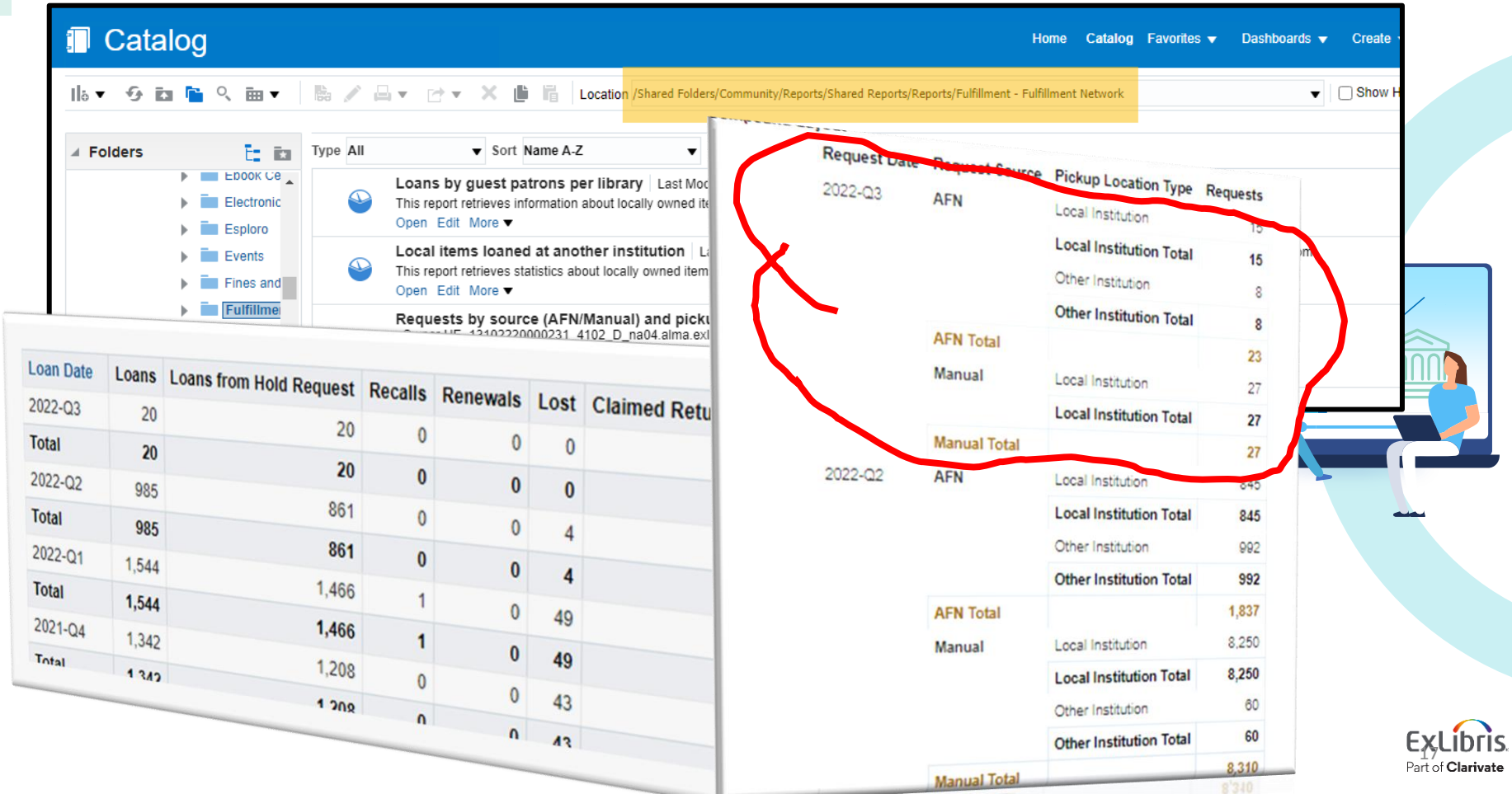
Some Stats



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Q&A

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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

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Q&A

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

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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.

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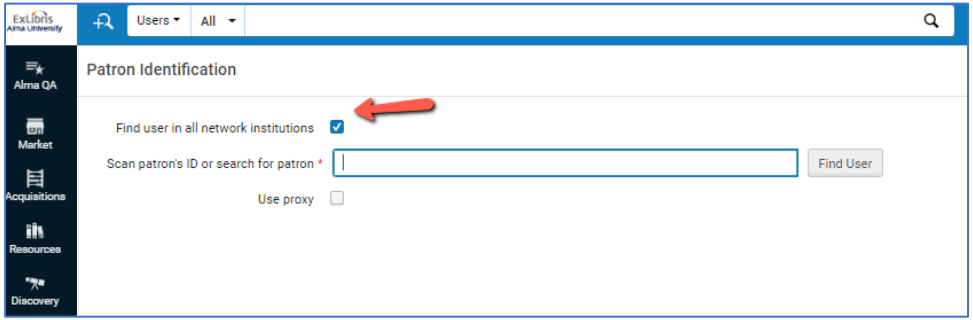
Q&A

- 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.



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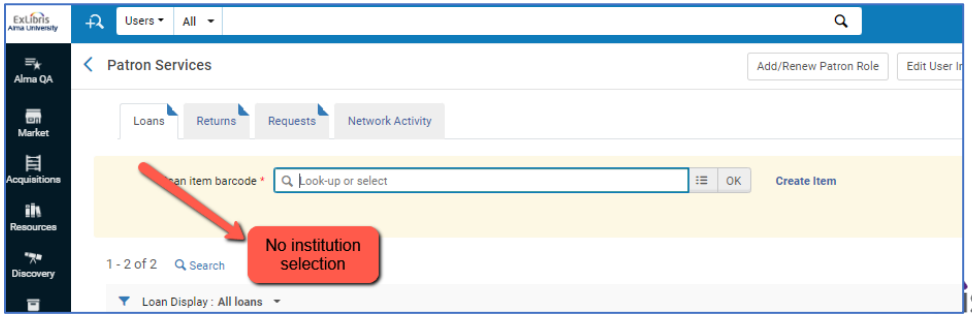
Q&A

- 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.

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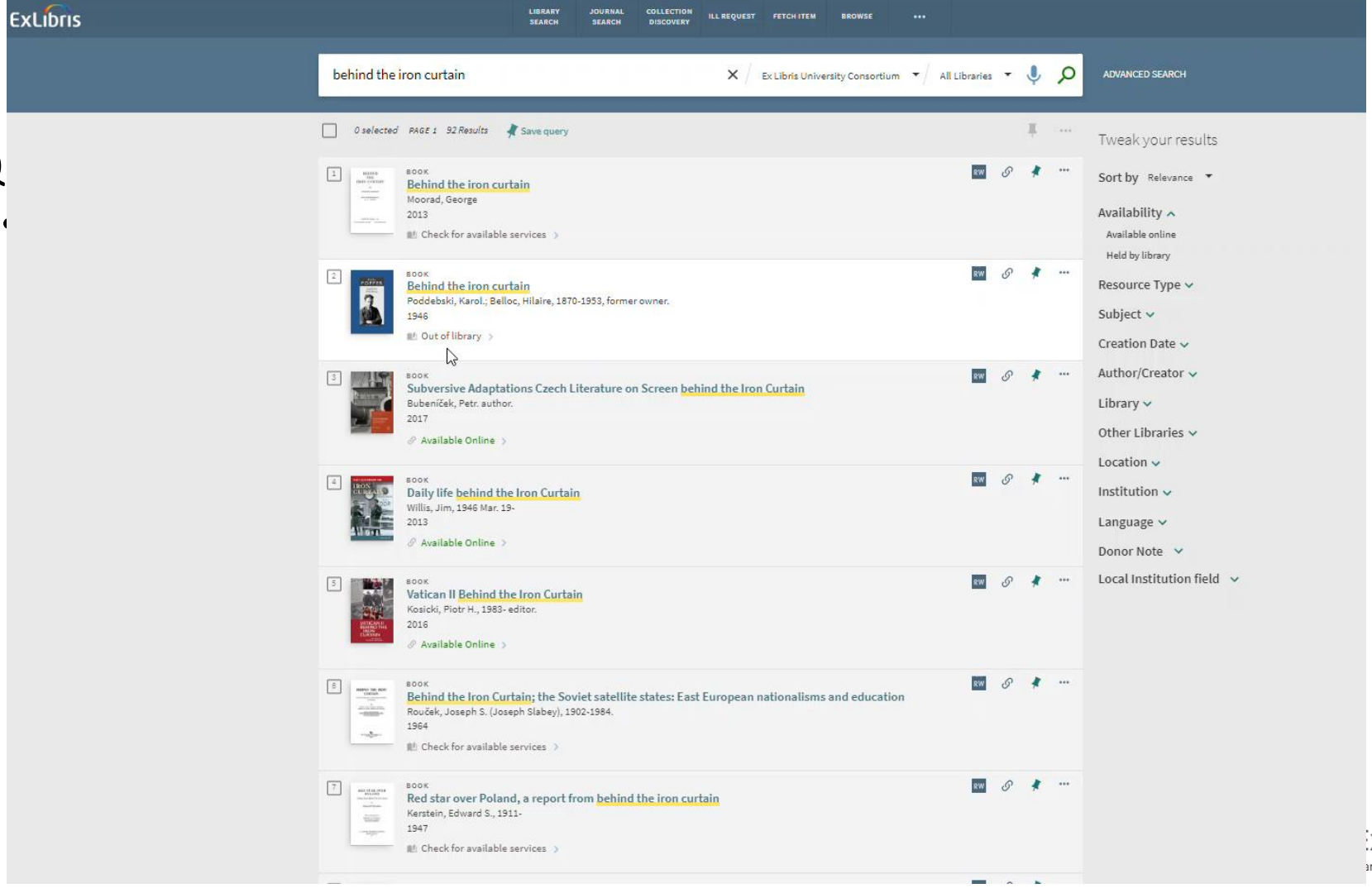
- Q



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Thank you!

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Configurations

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The Network

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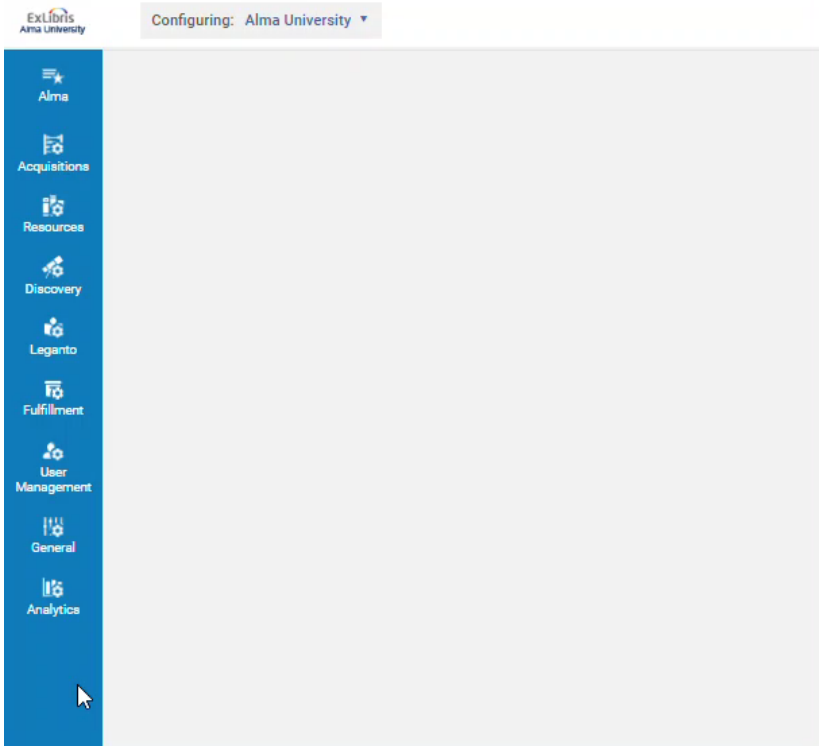
The Network

Shared password



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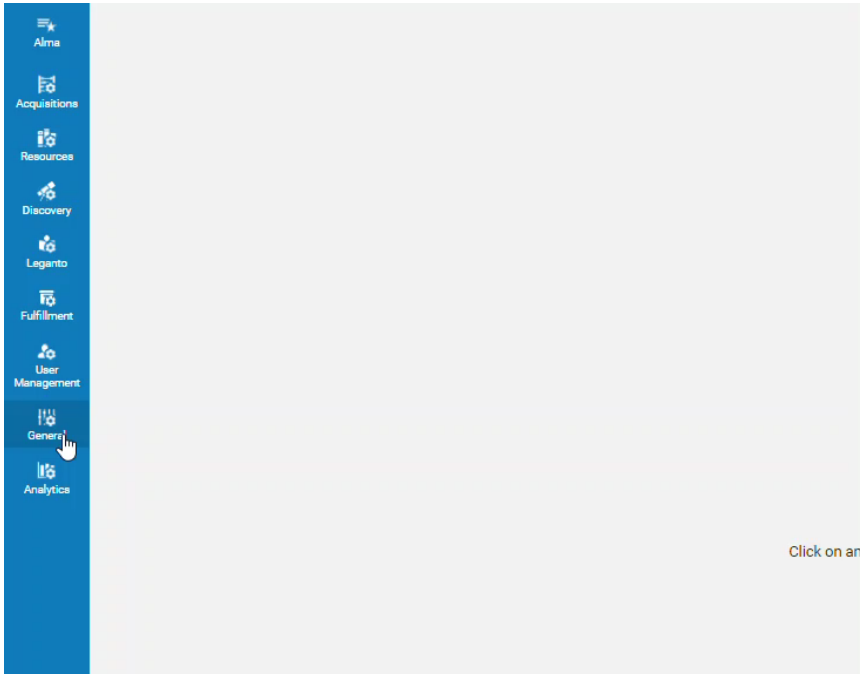
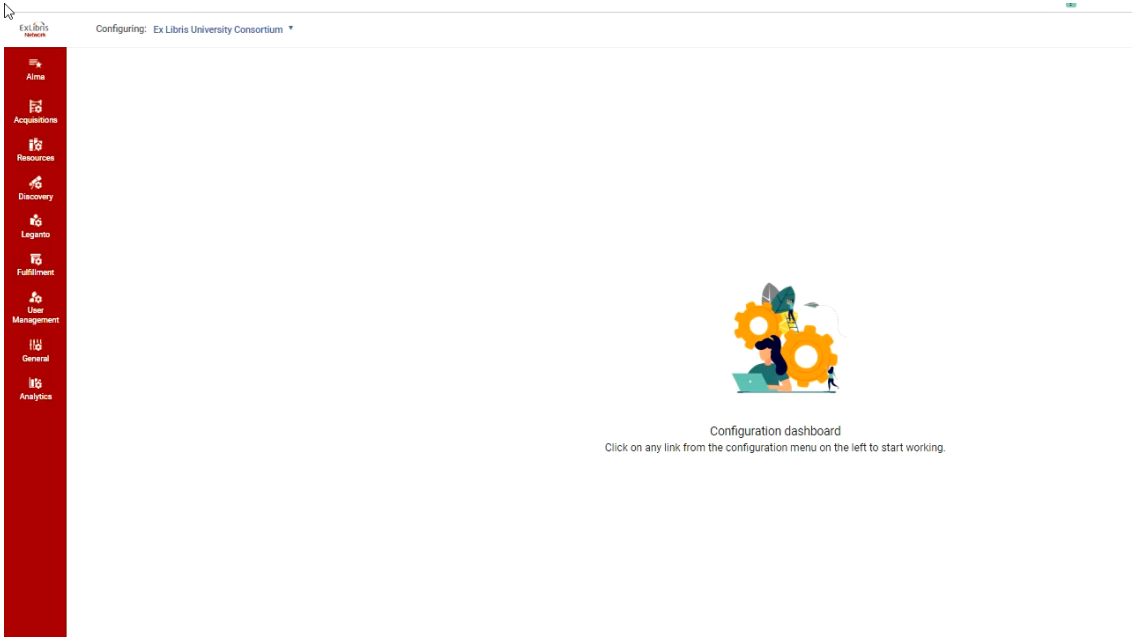
The Network

Members (non NZ members)



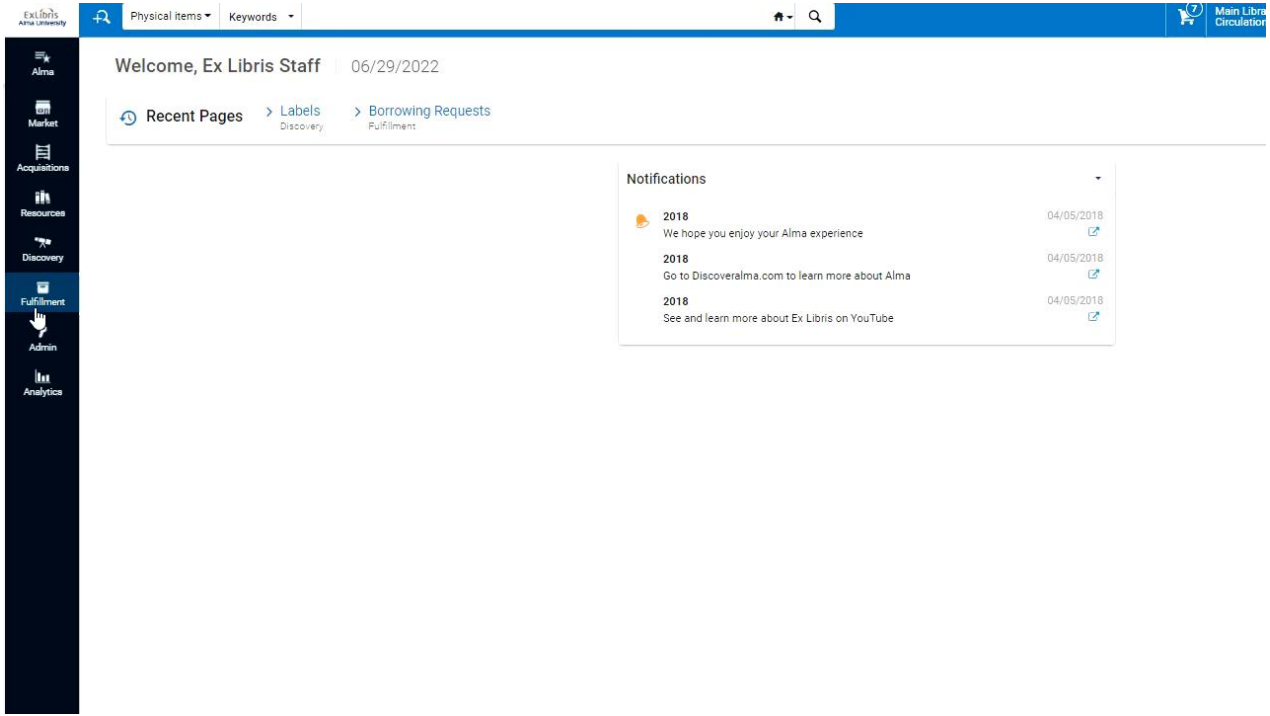
The Network

Members (NZ members)

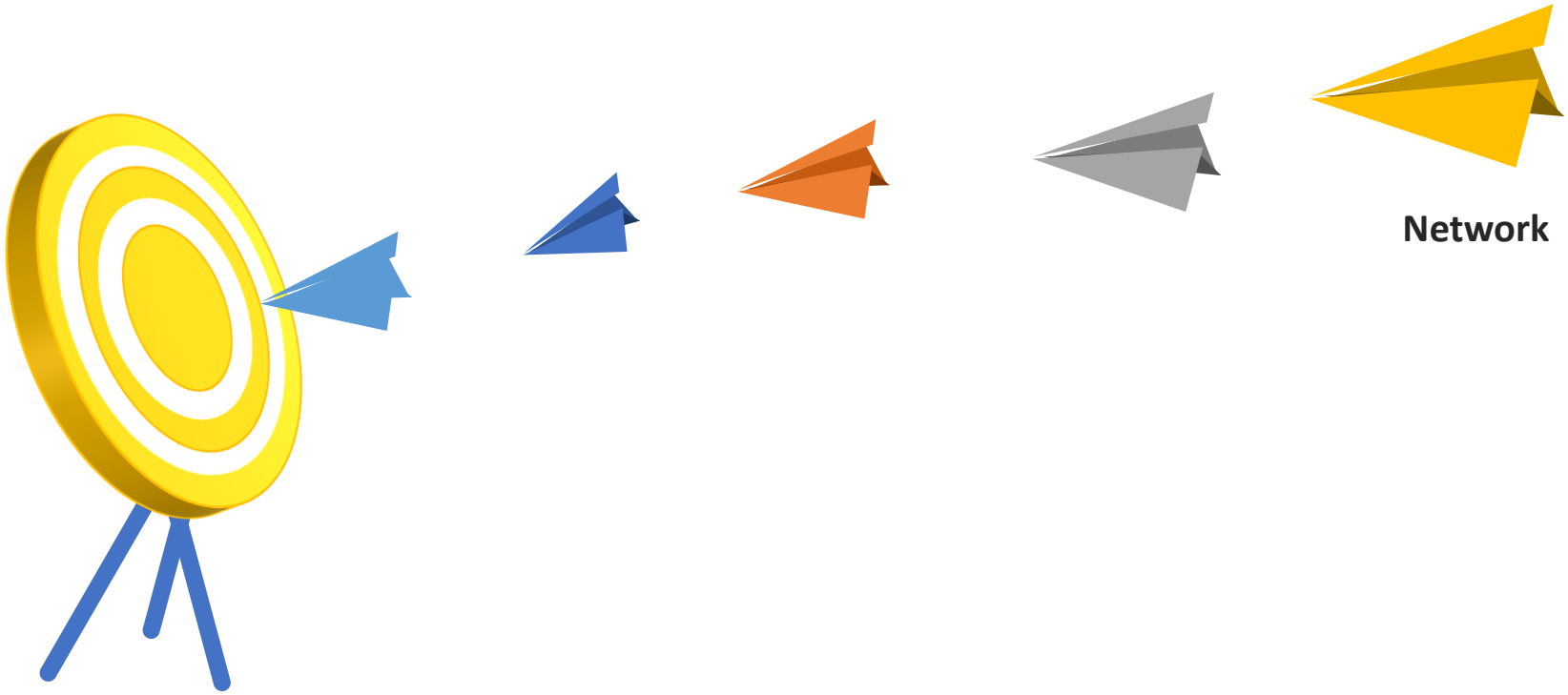


The Network

Testing the setup



Configuration Steps



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The Shared Users

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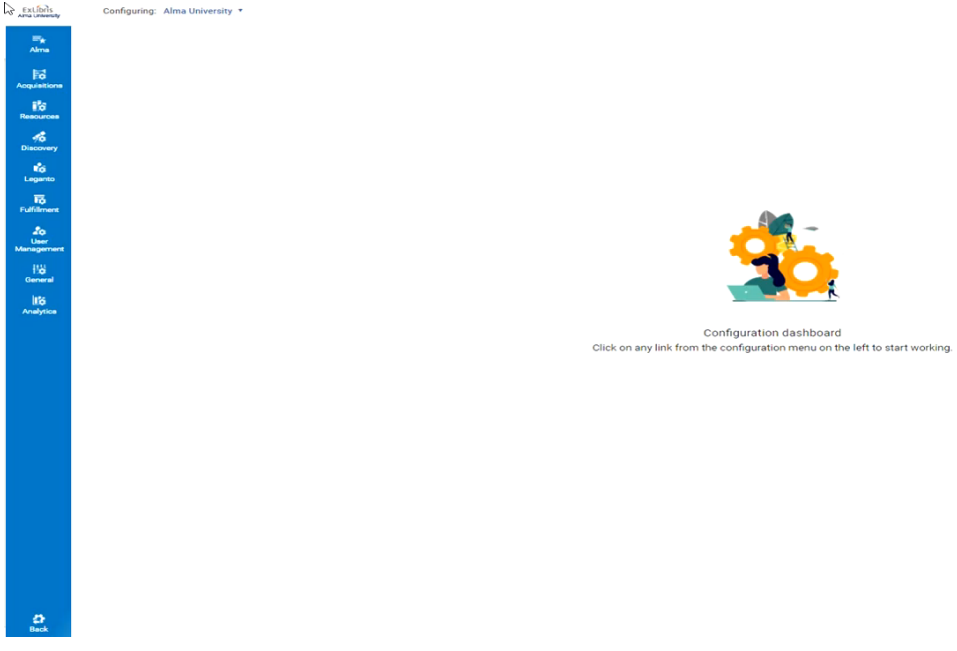
Linked Account Rules

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

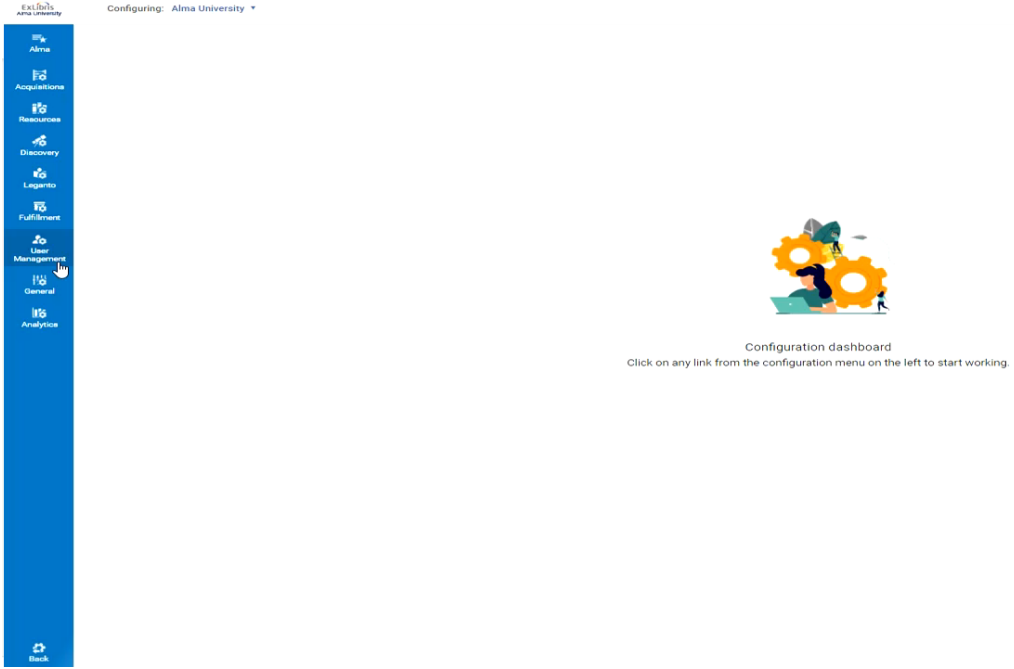
This configuration option maps the values of the linked account that is created in your institution.



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.



Restricted Users

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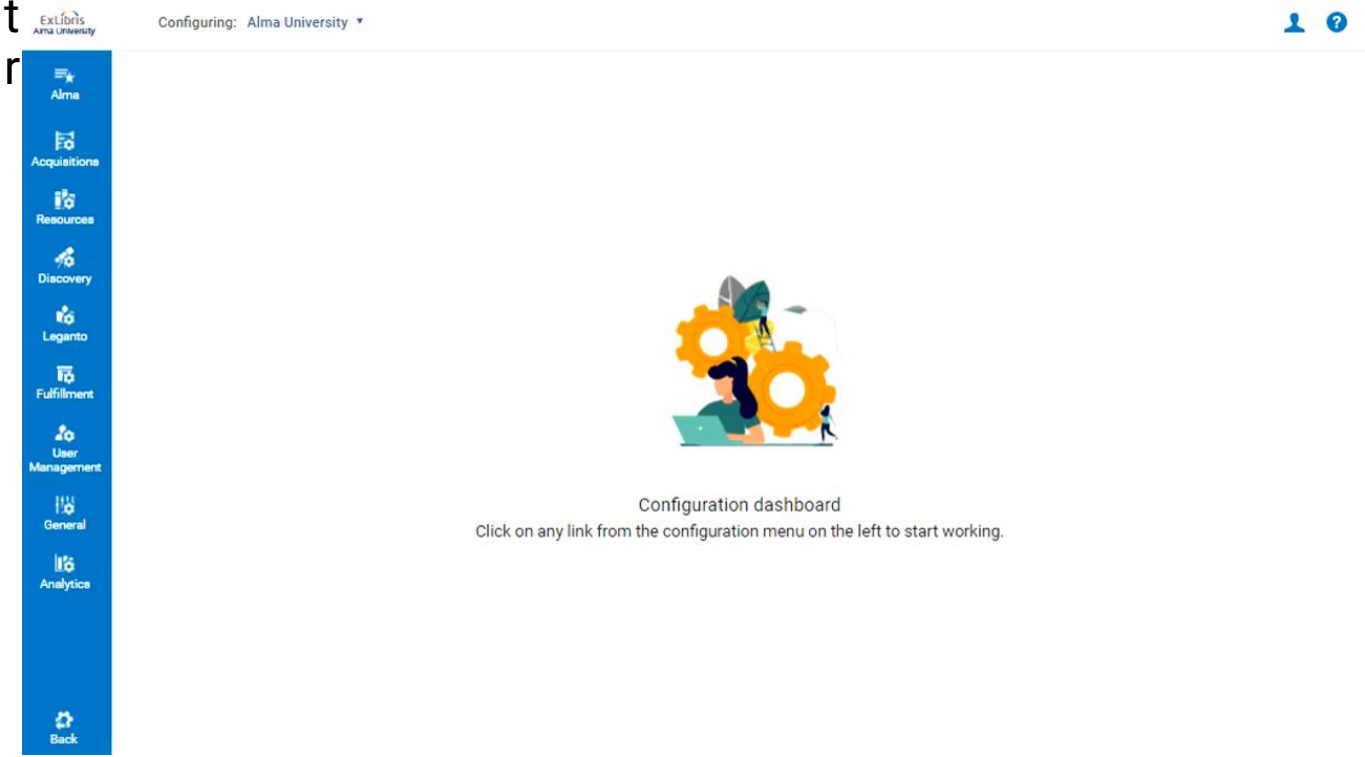
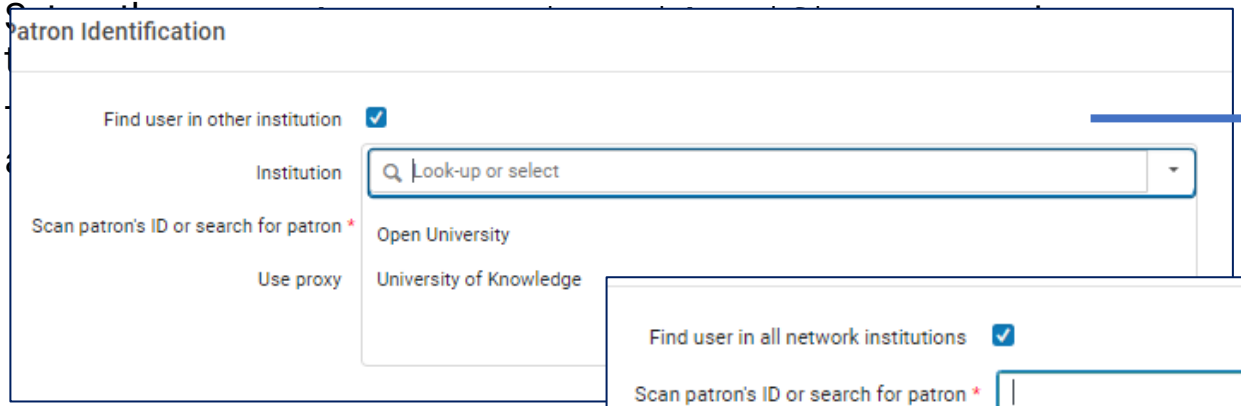
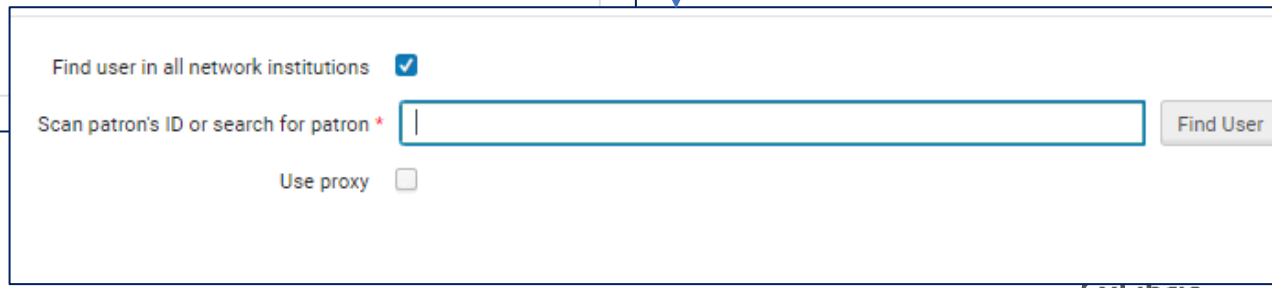


Consortially Unique Identifiers

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.

-
-





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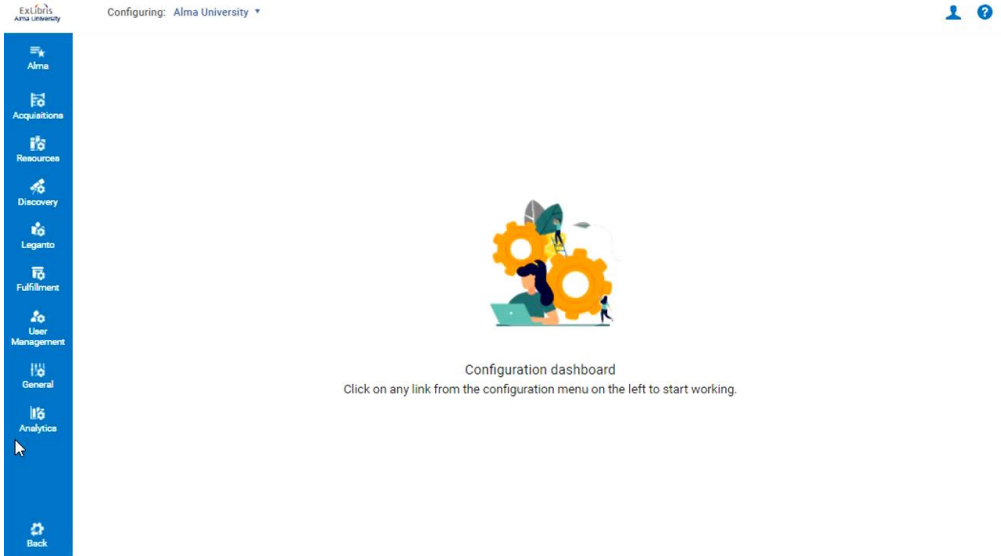
Searchable Identifiers

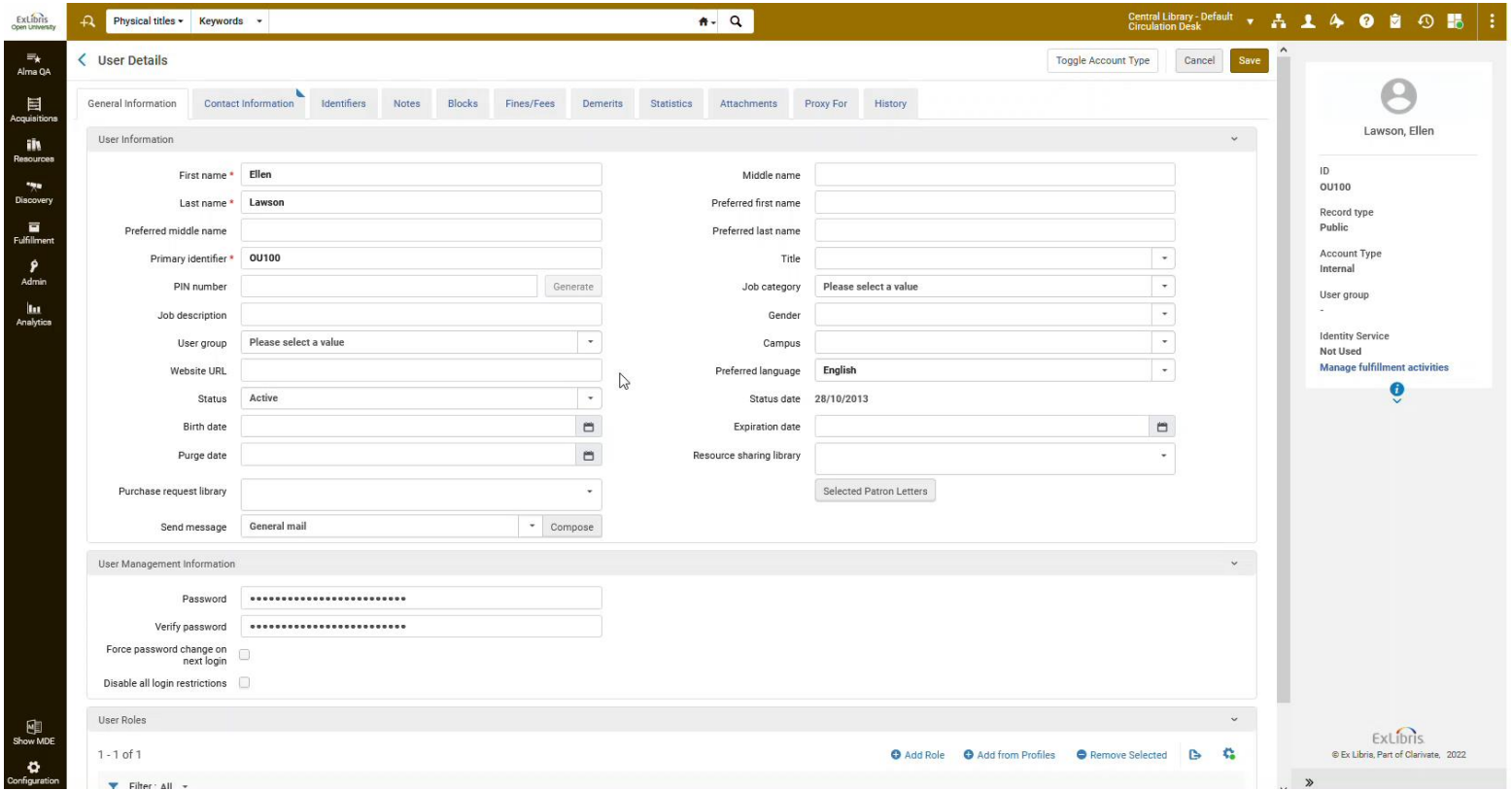
Only patrons that are granted the ID types configured in this table can get fulfillment network services, and only by using the IDs of the types configured here when identifying at the circulation desk of a remote library.

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



The Shared Users

Testing the setup



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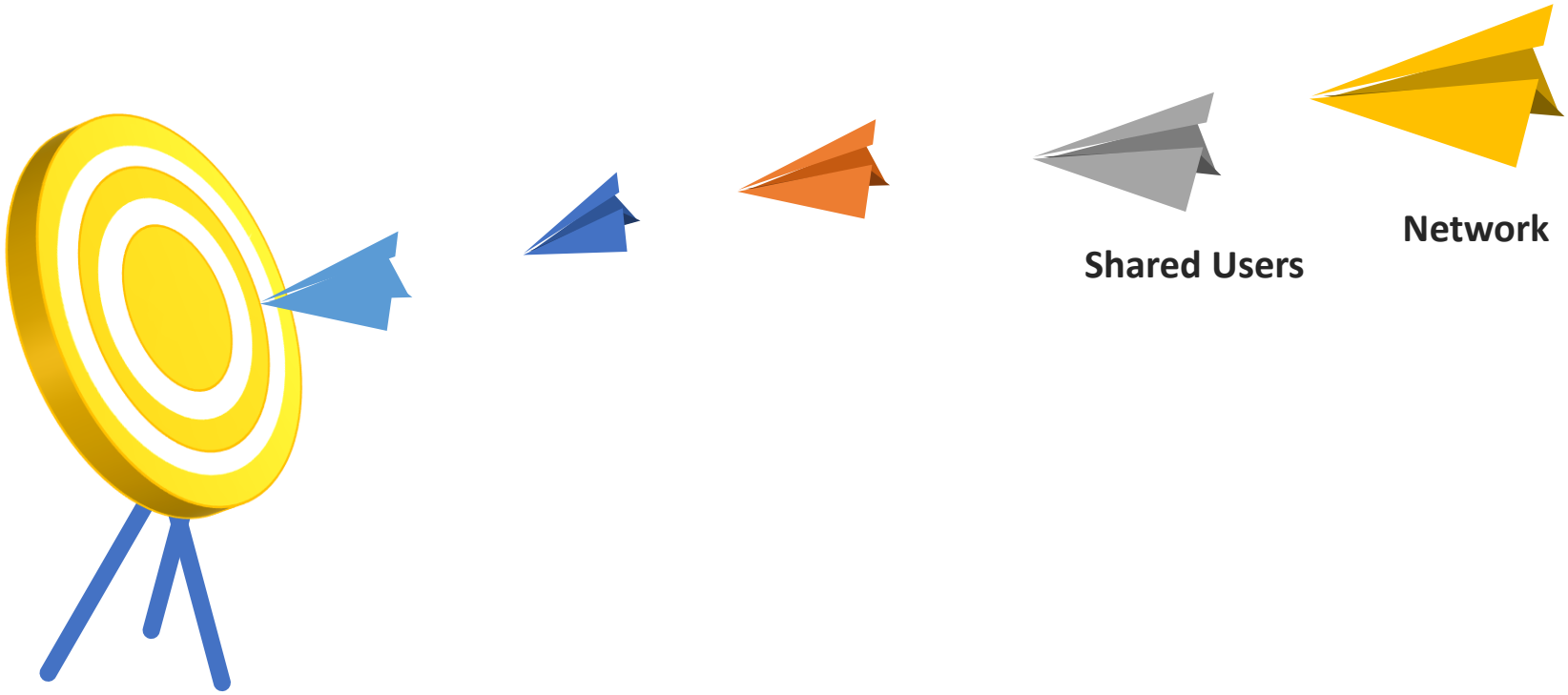
Configuration Steps



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Loan Attributes

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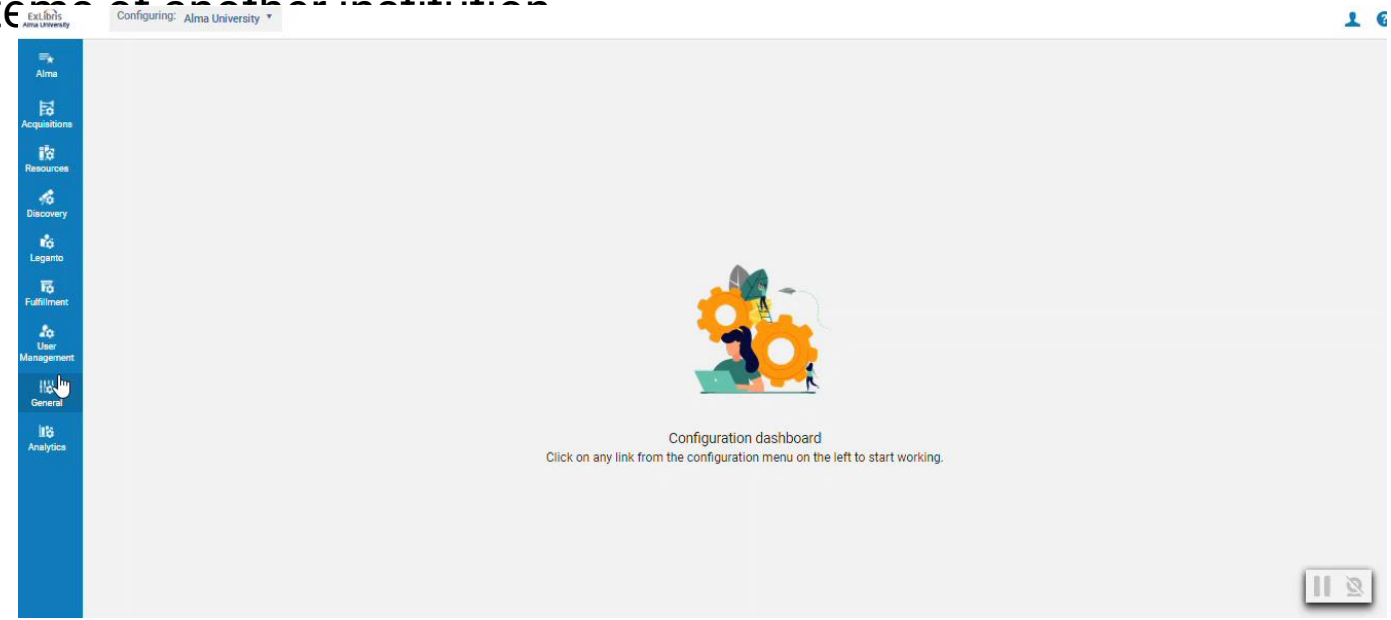
Library Relations

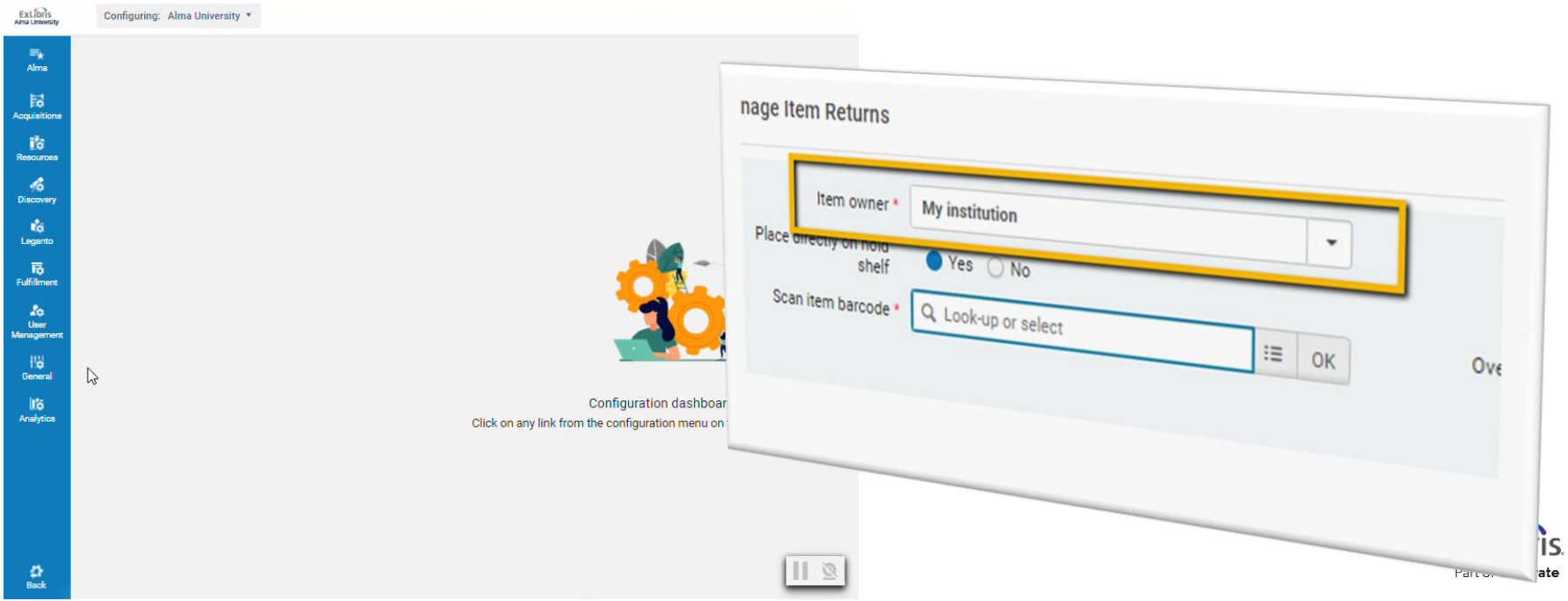
Institution relations determine:

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



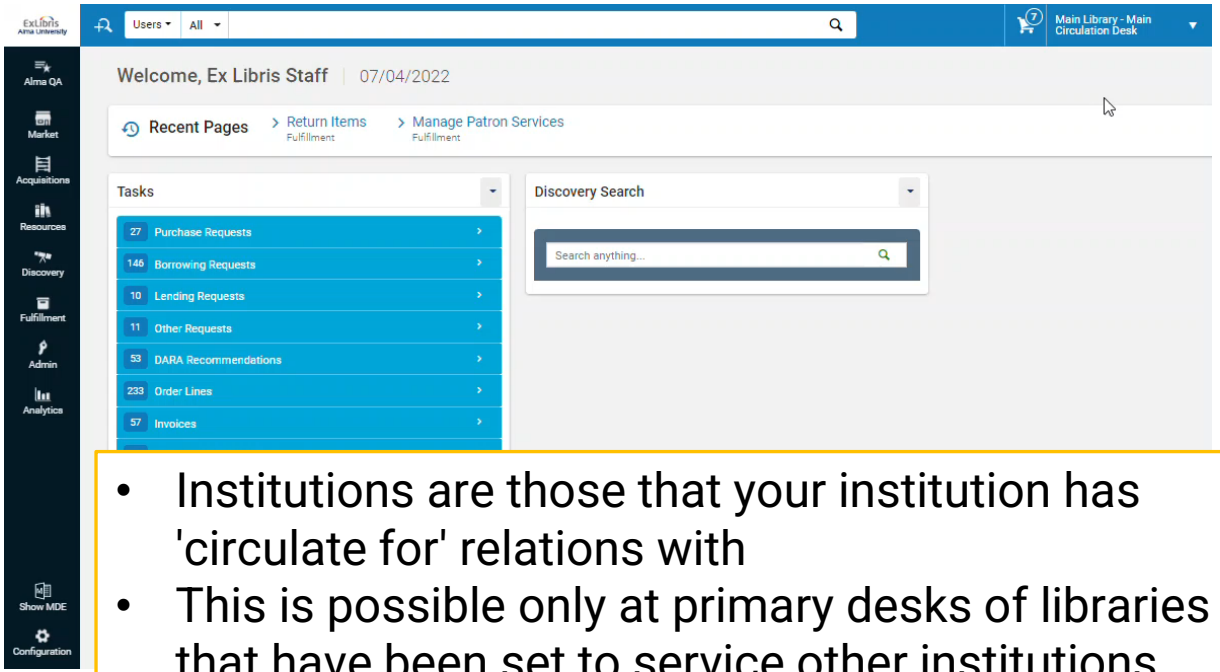
Library Serves Other Institutions

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



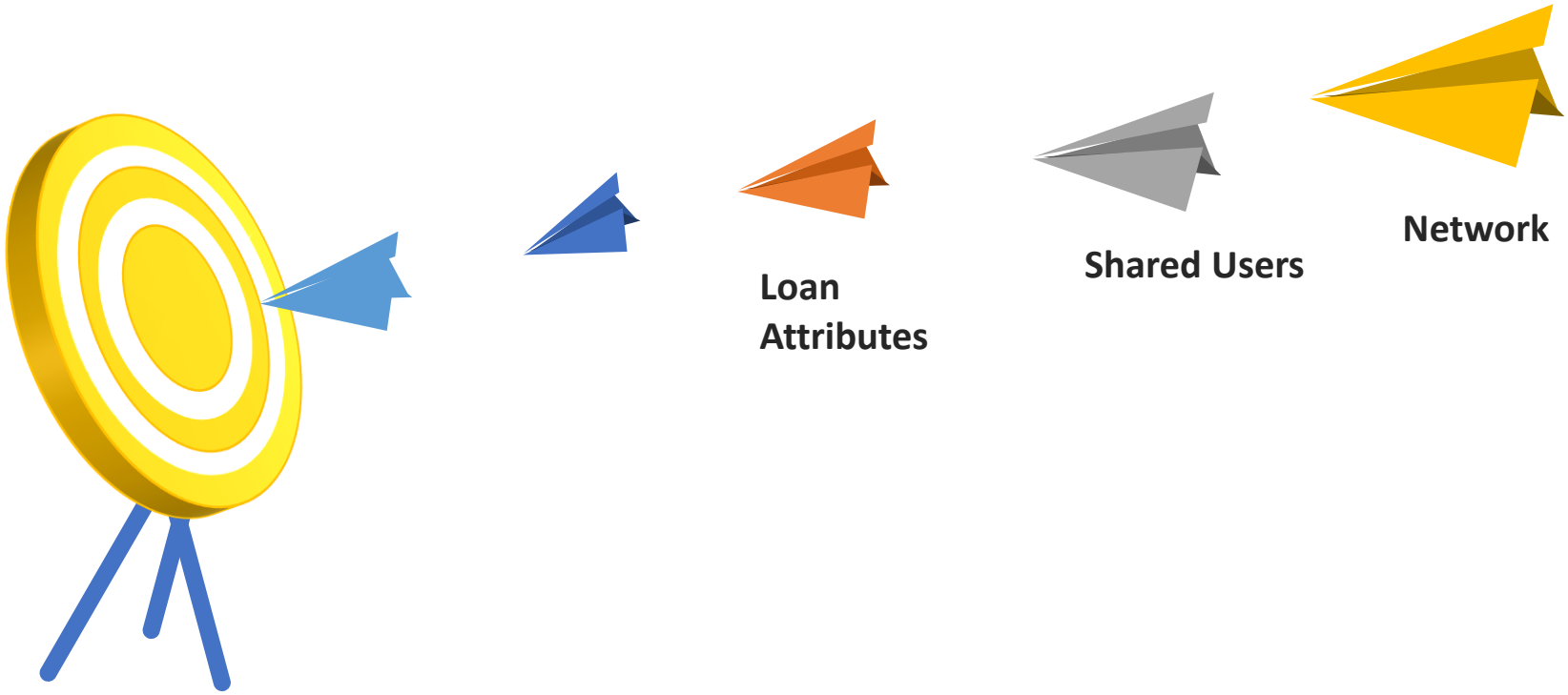
Loan Attributes

Testing the setup



- 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



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Request Attributes

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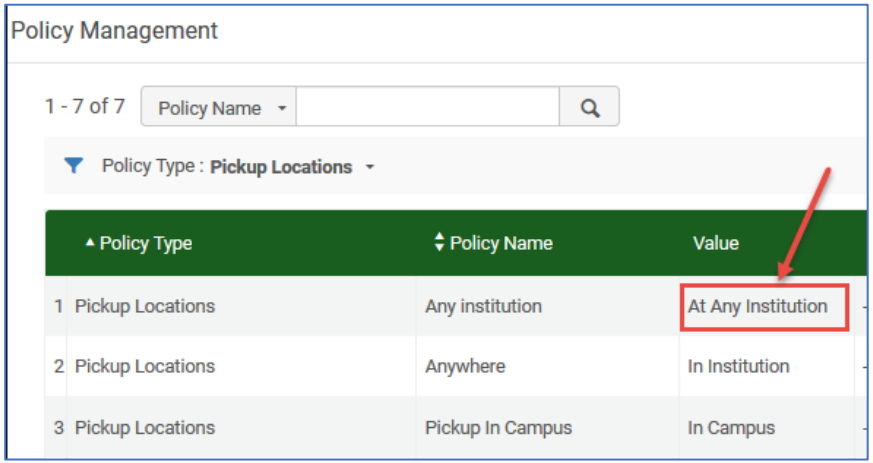
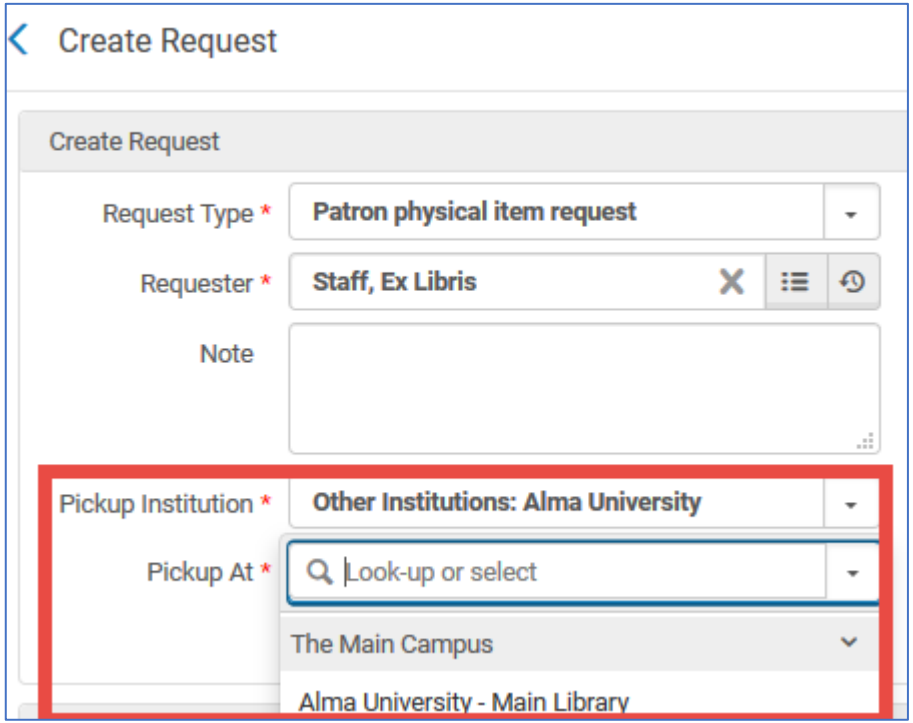
Request Attributes

- 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**



Request Attributes

- Testing the setup



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Configuration Steps

Request Attributes

Loan Attributes

Shared Users

Network

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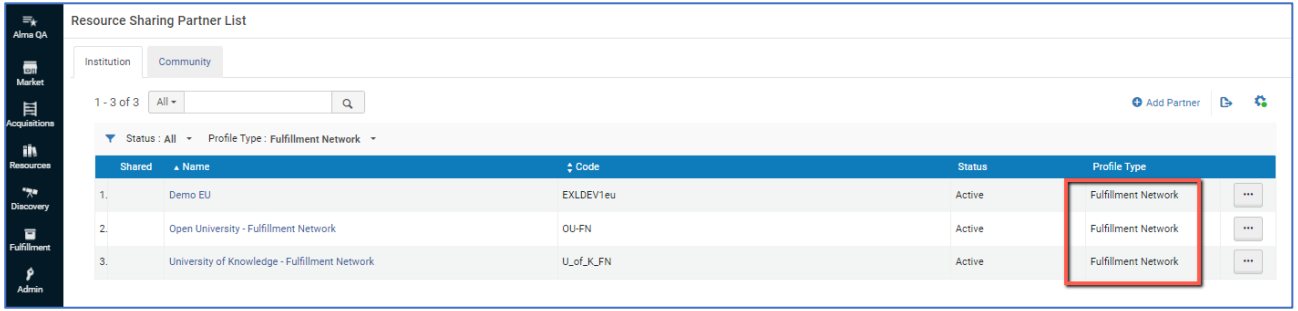
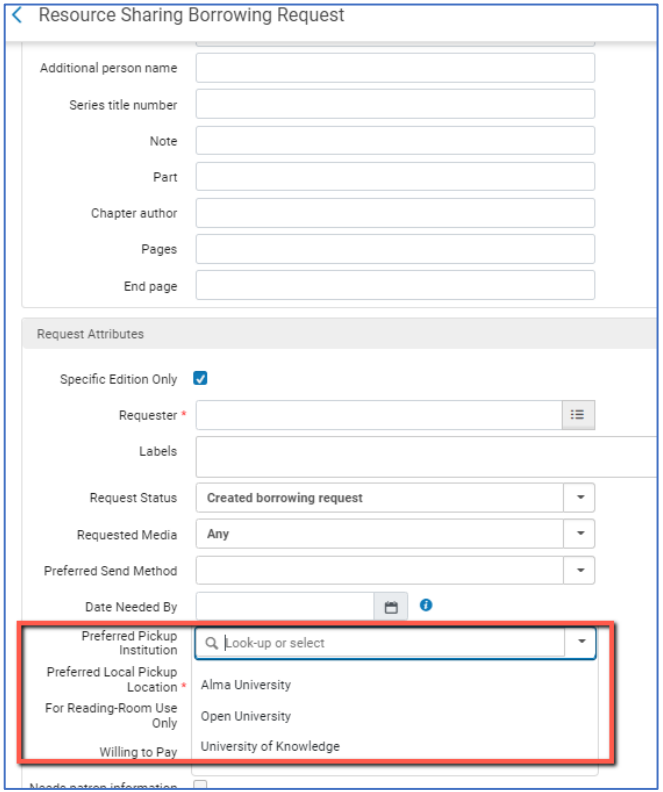
AFN

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

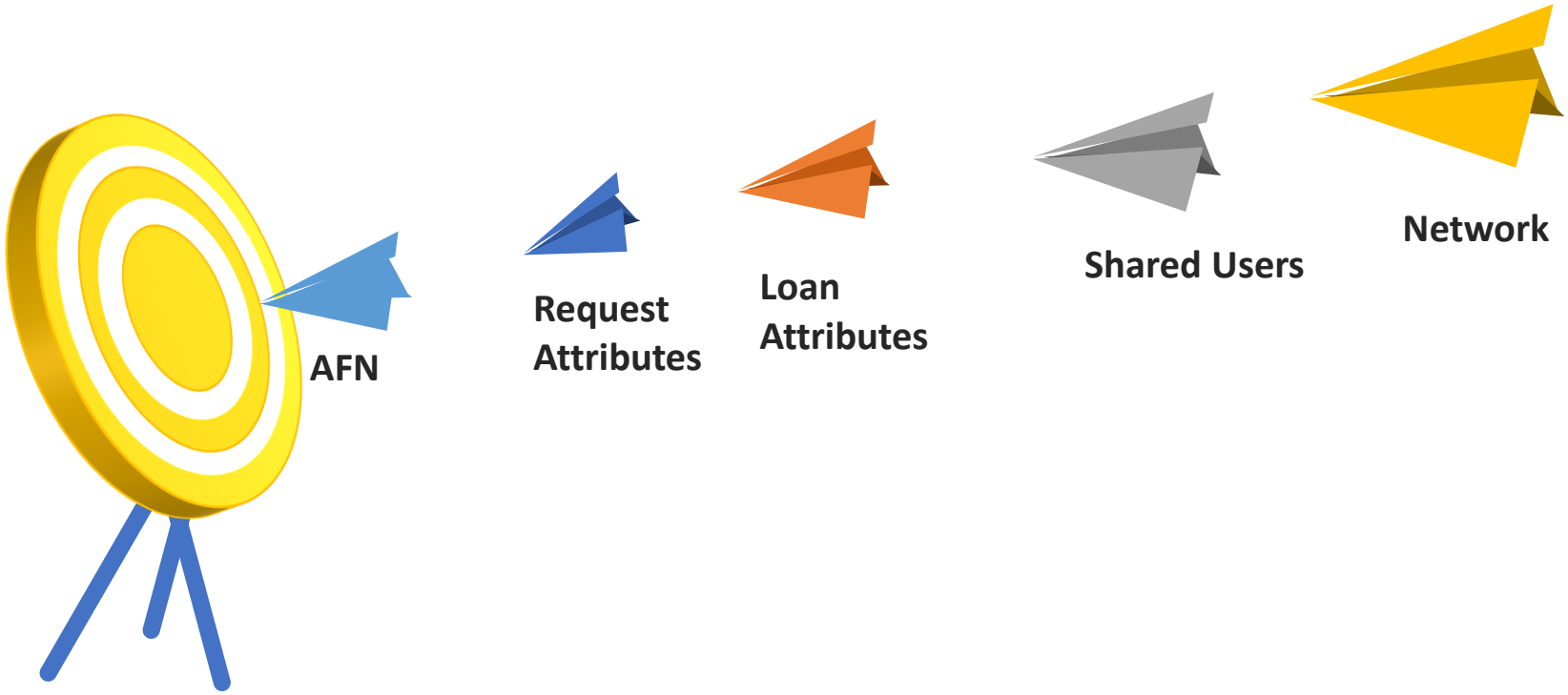


AFN

- Testing the setup



Configuration Steps



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