Digital Fulfillment in Alma

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Senior Librarian
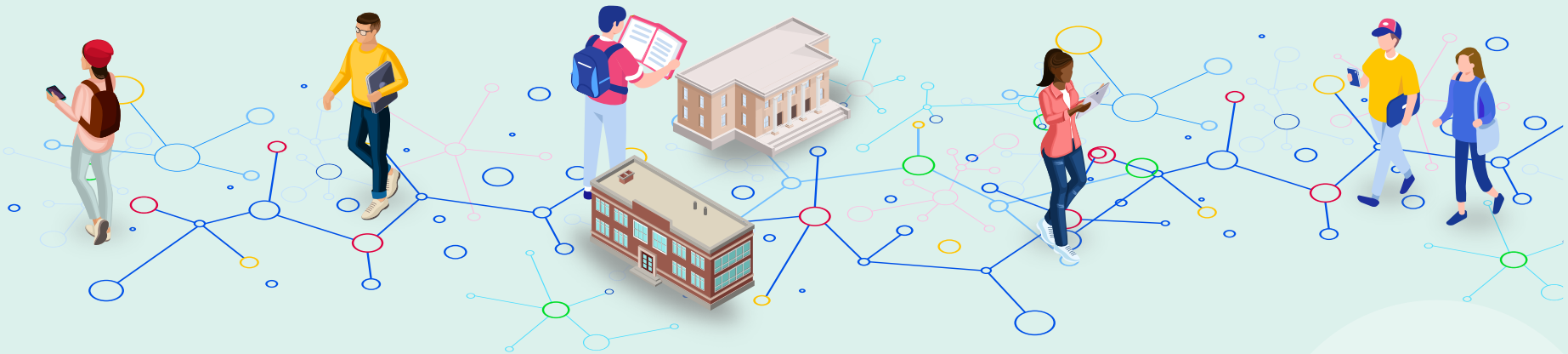
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Agenda

- Introduction
- The steps to set it up
- Defining the Access Rights with Waitlist Management
- Applying the Access Rights to a Digital Resource
- The flow of the patrons using Patron Waitlist
- Testing the flow of the patrons using Patron Waitlist
- Digital fulfillment patron waitlist in Alma Analytics
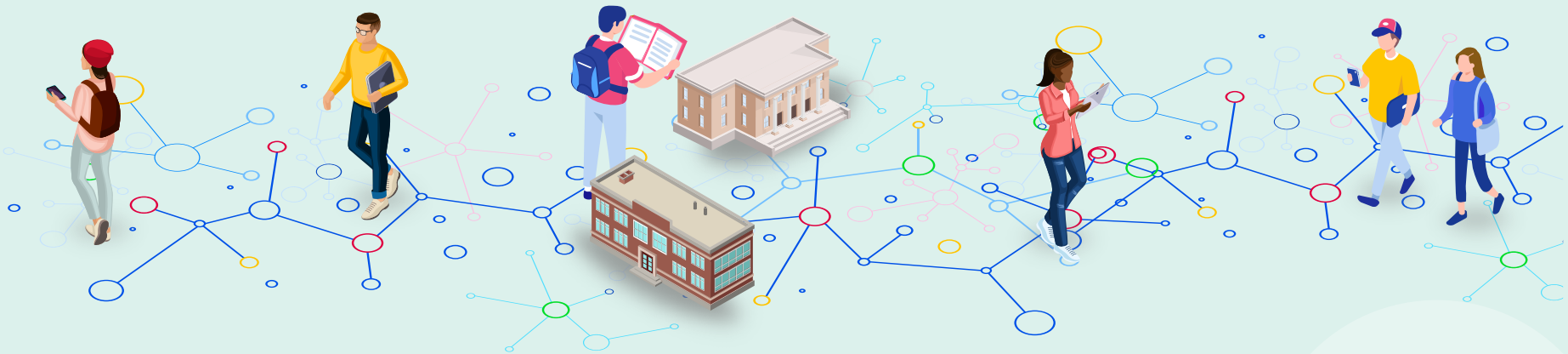
Introduction

Introduction

- Digital fulfillment in Alma (also known as "Patron Waitlist for Digital Resources") allows the institution to

  - Determine **how many** concurrent users can view a digital object

  - Control **how long** each user can view a digital object

  - Enable patrons to **join a "waitlist"** to view a digital object at a later period if it is currently not available due to maximum concurrent users viewing it.

    - By joining the "waitlist" the patron will be notified when the object becomes available (maximum concurrent users is no longer reached) and then he or she will be able to view the object.

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Introduction

- In this presentation we will show
  - how to configure the Patron Waitlist
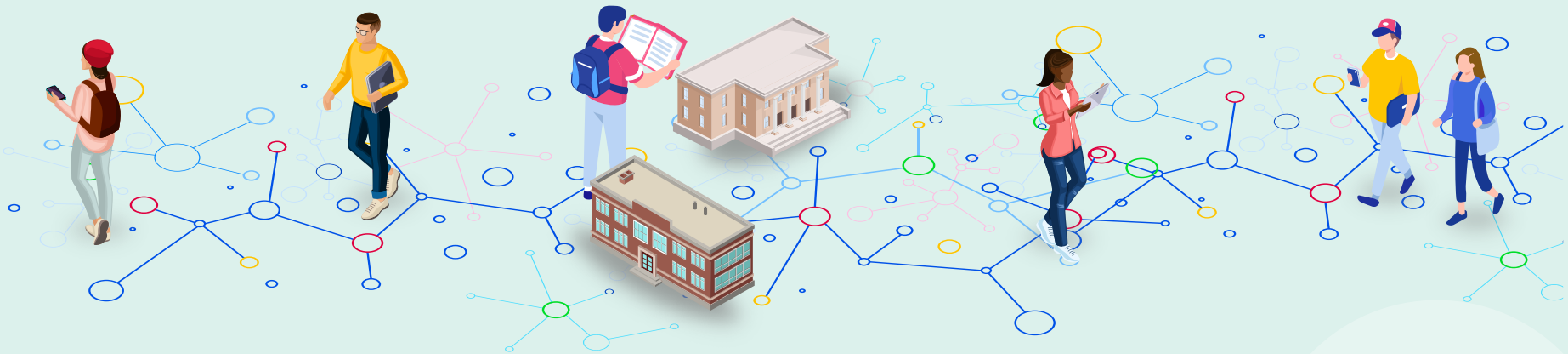 - how this works from the perspective of the patron

The steps to set it up

The steps to set it up

1. Define an access right

2. In the access right include a "Denied Note" telling the user about the concurrent user limitation

3. Create a rule (expression) in the access right limiting access by the number of concurrent users and limiting access to registered users.

4. In the rule check the box "Manage Access Waitlist" and set a grace period

5. In the rule do not check the output box "Allow Download"

6. Apply the Access Rights to one or more Digital Resources

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The steps to set it up

- Note that the waitlist is designed for registered users (not guests).
  - The function is user based including sending emails and / or SMS messages to the users.
  - Therefore, the access right includes a rule limiting access to registered users

Defining the Access Rights with Waitlist Management

Defining the Access Rights with Waitlist Management

- The [access rights](#) are defined at "Configuration > Fulfillment > Copyright Management > Access Rights".

- On the next slide we see the "details" section of an access right named "The YLK 1 concurrent user Access Rights Policy"

Defining the Access Rights with Waitlist Management

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< Access Rights Policy

The YLK 1 concurrent user Access Rights Policy

Details

Name*	The YLK 1 concurrent user Access Rights Policy
Copyrights	
Description	1 concurrent user at a time can view the digital object
Denied Note	The maximum number of concurrent users viewing the resource has been reached, please select the link to register
Denied Note (override for unregistered users)	Please sign in to be able to view the digital object

The "Denied Note" will appear to the end user in Primo when access is denied.
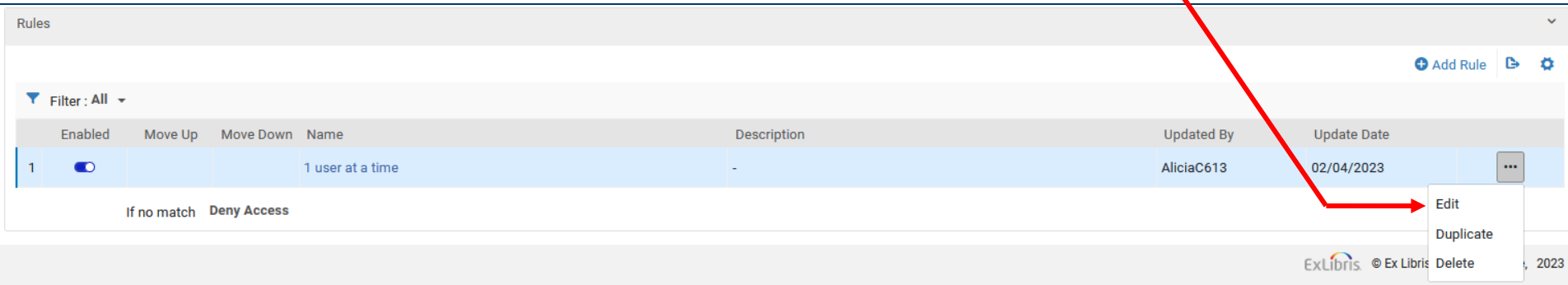
The "Denied Note (override for unregistered users)" will appear to an end user who did not login in Primo when access is denied. If this field is blank, then the "Denied Note" will appear instead.

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Defining the Access Rights with Waitlist Management

- On the next slide we see the "rules" section of access right named "The YLK 1 concurrent user Access Rights Policy"

- The rule is called "1 user at a time" and it has two expressions:

- An expression which defines that there can be one concurrent user.

- An expression stating that the user must be registered (logged in) to view the object

Defining the Access Rights with Waitlist Management

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We will now click "edit" to see how this rule is made

Rules								∨

⊕ Add Rule

▼ Filter : All ▼

	Enabled	Move Up	Move Down	Name	Description	Updated By	Update Date	
1	⬤			1 user at a time	-	AliciaC613	02/04/2023	⋯

			Edit
If no match	**Deny Access**		Duplicate
			Delete

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Defining the Access Rights with Waitlist Management

Part of the rule is an expression regarding concurrent users, and we will take a look at it now.

Expressions ▾

⊕ Add Parameter ▾   ⬀   ⚙

	Name	Operator	Value	
1	Concurrent Users (Short-Term Loan)	Usage	1 users within 3 minutes	⋯
2	Registered	=	True	

Edit
Delete

Defining the Access Rights with Waitlist Management

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Edit parameter

Name	**Concurrent Users (Short-Term Loan)**
Numbers of Users*	1
Within (Minutes)*	3

Cancel   Save

We have defined that 1 user at a time can view the digital object (to which the access right will be applied) and he or she can view it for 3 minutes. Typically, it would be longer than three minutes, but to be able to demonstrate here the functionality more "quickly" we will leave it at 3 minutes.

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Defining the Access Rights with Waitlist Management

- Here is the remainder of the access rights rule

"Manage Access Waitlist" needs to be checked for the Waitlist to be in use

Waitlist Management

Manage Access Waitlist ☑

Grace Period (minutes)* 10 ⓘ

Limit Waitlist to Specific ☐
Hours

From | To | Library hour format HH:mm (hour 00-23, minute 00-59)

The "Grace Period" is the amount time during which the patron must access the resource (from the time of it becoming available) before losing the place in line

Output

Allow View ☑

Allow Download ☐

The "Limit Waitlist to Specific Hours" fields can be used to determine that at certain hours (such as at night when library is closed) the Waitlist will not be in effect.

In our case we are not allowing "Download". That would defeat the whole purpose of limiting to a specific number of concurrent users.

Applying the Access Rights to a Digital Resource

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Applying the Access Rights to a Digital Resource

- We will now apply the access right to digital resource "Outrageous and Everyday: The Papers of Gloria Steinem"

Applying the Access Rights to a Digital Resource

The access right has been added to the representation

Applying the Access Rights to a Digital Resource

- It is also possible to perform an advanced search kin digital titles for all titles which have a specific access rights policy

Applying the Access Rights to a Digital Resource

- Now we have all of the titles with a representation that has the access rights policy "The YLK 1 concurrent user access rights policy"
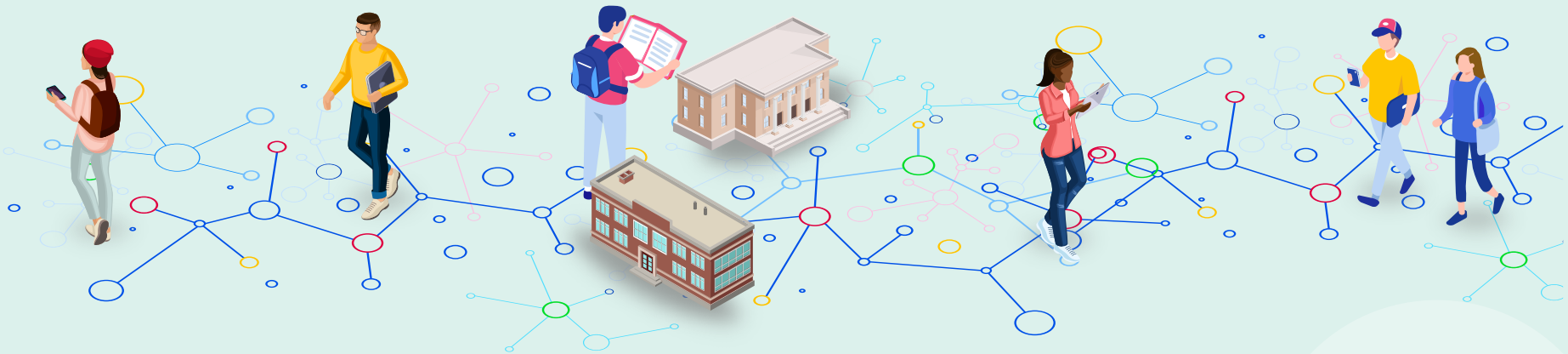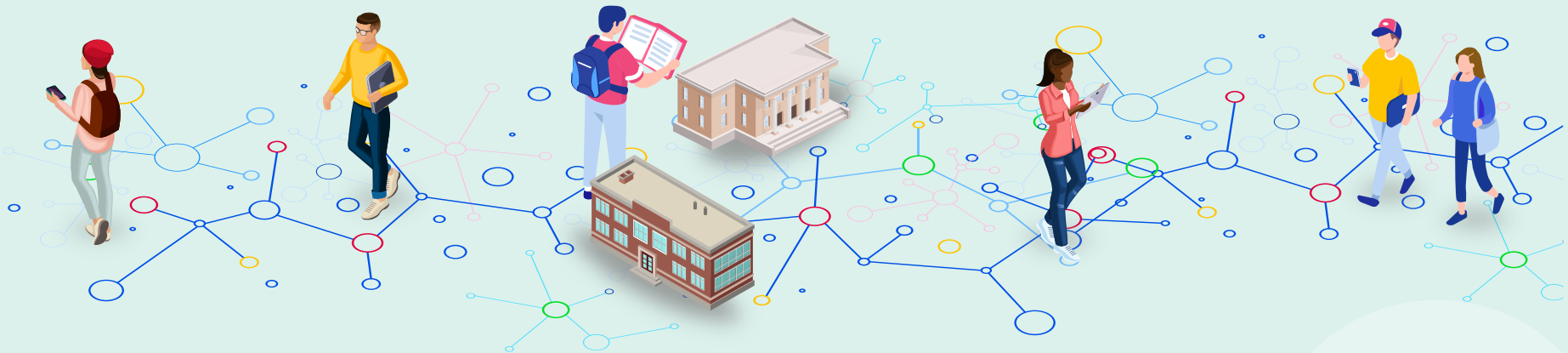
The flow of the patrons using Patron Waitlist

The flow of the patrons using Patron Waitlist

1. User A searches Primo and finds a digital resource

2. User A sees a message that he or she must be logged in to view the digital resources

3. User A logs in and views the digital resource

4. User B searches Primo and finds the same digital resource

5. User B logs in and tries to access the digital resource and is told that he or she cannot view it but can join the waitlist.

6. User B joins the waitlist and receives email notification that he or she is in the waitlist

7. The time period for user A to view the digital object ends (or user A does "early checkout") and the digital object becomes available for user B

8. User B gets an email that the digital object is now available for his or her viewing.

9. User B views the digital object either by searching for it and clicking "available online" or by clicking the link in the email.
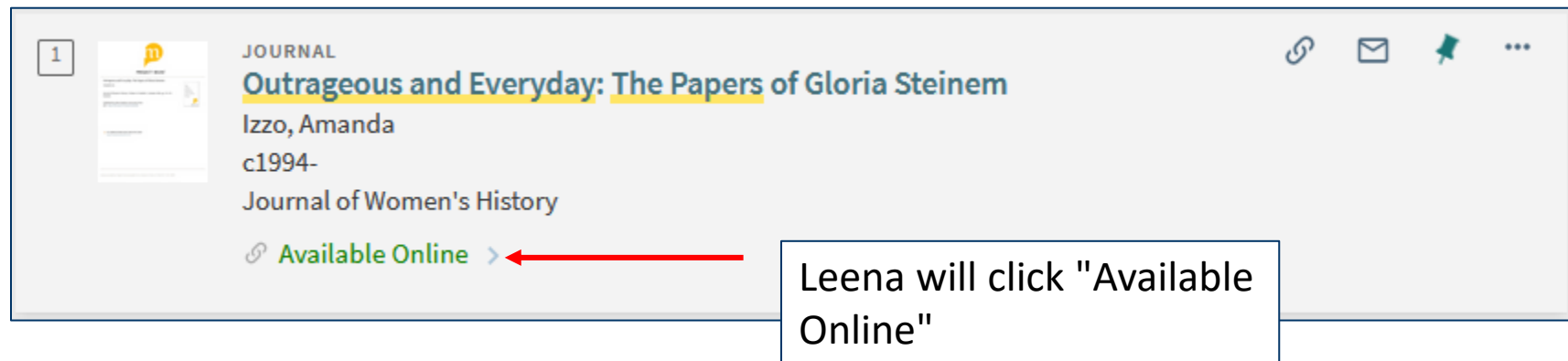
The flow of the patrons using Patron Waitlist

- In our example
  - "User A" is Leena Alam
  - "User B" is Anna Nemati

Testing the flow of the patrons using Patron Waitlist

Testing the flow of the patrons using Patron Waitlist

- User Leena Alam searches in Primo and finds the resource. She is not logged in.

JOURNAL

Outrageous and Everyday: The Papers of Gloria Steinem

Izzo, Amanda

c1994-

Journal of Women's History

🔗 Available Online >

Leena will click "Available Online"

- The "Denied Note (override for unregistered users)" which we defined in the access rights appears for Leena.

View Online

Additional services may be available if you sign in →] Sign in

Digital Version(s) Availability

Showing 1 of 1 results

Alma viewer
1 file/s (pdf)
🔒 *Please sign in to be able to view the digital object*

🔒

Testing the flow of the patrons using Patron Waitlist

- Leena logs in and now can view the digital object

View Online

Digital Version(s) Availability
Showing 1 of 1 results

Alma viewer
1 file/s (pdf, 498.04 KB)

Details

Title   Outrageous and Everyday: The Papers of Gloria Steinem

Testing the flow of the patrons using Patron Waitlist

- Leena logs in and now can view the digital object

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Leena Alam ▾

Outrageous and Everyday
of Gloria Steinem

The hourglass can be used to check how much time is still available for viewing the object

Papers

⌛ 📂 RETURN EARLY

🔲 🔍 ↑ ↓ 2 of 4 — + 100% ▾ 🖥 📤 🔖 »

Outrageous and Everyday
The Papers of Gloria Steinem

Amanda Izzo

As an archives assistant for the Sophia Smith Collection, I arranged the papers of Gloria Steinem who is, needless to say, a noted feminist activist, journalist, speaker, and organizer. She is also a founder, editor, and spokesperson for *Ms.*, a magazine that has recently attempted to resume its former status as the popular Many people might identify Steinem an Though she was not a pioneer of the singled her out for her beauty and charis nic representative of women's liberation erful symbol of feminism.
        I began work on the Steinem pape

» Description

Title:
Outrageous and Everyday:
The Papers of Gloria Steinem

Material Type:
Journal

The "Return Early" can be used to release the object for the next user in line (in the Waitlist) even if the allotted time has not passed.

Testing the flow of the patrons using Patron Waitlist

- Leena has clicked the hourglass and now sees the remaining time.

Testing the flow of the patrons using Patron Waitlist

- When the end of the allotted time approaches the user gets a message

Testing the flow of the patrons using Patron Waitlist

- While Leena is viewing the digital object a different user, Anna Nemati, logs into Primo, finds the resource, and clicks "Available online" .

- Anna sees a message telling her to request to be added to the Waitlist. The text of this message is from the "Denied Note" in the access rights policy.

- Anna clicks the message

View Online

Digital Version(s) Availability
Showing 1 of 1 results

Alma viewer
1 file/s (pdf, 498.04 KB)

The maximum number of concurrent users viewing the resource has been reached, please select the link to register

Testing the flow of the patrons using Patron Waitlist

- After clicking the message Anna can "Join the Waitlist"

Waitlist registry

The number of concurrent users has reached the limit

Join the waitlist and you will receive an email when the resource is available

JOIN THE WAITLIST (0 USERS)

- Anna is added to the Waitlist

You have been added to the waitlist

A notification will be sent to yoel.kortick@clarivate.com once the resource becomes available

You are number 1 in the waitlist

You will have 10 minutes to start viewing the resource, before it will be passed on to the next user in the waitlist

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Testing the flow of the patrons using Patron Waitlist

- Anna gets an email stating that she has been added to the Waitlist

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Delivery Registration Status Report

03/04/2023

Nemati Anna

Alma University
Main Library Billing Dept.
123 Meydanut Blvd.
Yeruham
USA

Dear Sir/Madam   Nemati

You have been added to the waitlist for accessing "Outrageous and Everyday: The Papers of Gloria Steinem"
and are currently number 1 in the waitlist.

A notification will be sent once the resource becomes available. You will have 10 minutes to start viewing the resource before it will be
passed on to the next user in the waitlist.

Sincerely
Resource Management Department

Testing the flow of the patrons using Patron Waitlist

- The staff user can see everyone in the "waitlist" tab in the digital representation.

< Digital Representation Resource Editor | Relink to another bibliographic record | Cancel | **Save**

Outrageous and Everyday: The Papers of Gloria Steinem Izzo, Amanda Sage Publications Ltd Thousand Oaks, CA : 1994   >

General Information   Files List   Notes   History   **Waitlist**

1 - 1 of 1

	Requester	Request Time	Requester Group	Time in Waitlist	
1	Anna Nemati	03/04/2023 14:17	Alumni	13 seconds	...

Testing the flow of the patrons using Patron Waitlist

- When Leena's view time is over (or when Leena does early checkout) Anna receives an email staying that the digital object is available.
- The email includes a link to the digital object.
- Anna can use the link to the digital object from inside the email, or search primo and click "Available Online"
- This email appears in the next slide.

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Testing the flow of the patrons using Patron Waitlist

ExLibris
Alma University

Delivery Registration Status Report

03/04/2023

Nemati Anna

Alma University
Main Library Billing Dept.
123 Meydanut Blvd.
Yeruham
USA

Dear Sir/Madam   Nemati

"Outrageous and Everyday: The Papers of Gloria Steinem" is now available for you.

Access Resource

You have 10 minutes to start viewing the resource before it will be passed on to the next user in the waitlist.

Sincerely

Resource Management Department

Testing the flow of the patrons using Patron Waitlist

- Now it is Anna's turn to view the digital object

Anna is logged in and views the digital object

Digital fulfillment patron waitlist in Alma Analytics

Digital fulfillment patron waitlist in Alma Analytics

- Alma Analytics includes a subject area [Digital Waitlist](#)

Digital fulfillment patron waitlist in Alma Analytics

- This subject area allows the institution to investigate, for example, the following business questions:
  - How many sessions were in a specific timeframe?
  - How many of those sessions were in the waitlist?
  - How many session returned the resource early?
  - What is the average actual session time?
  - What is the average waiting for a given Rep ID?
  - What is the actual session length for a given Rep ID?
  - What is the average session length?
  - How many users missed the Grace Period?
  - What is the average Grace Period used?

Digital fulfillment patron waitlist in Alma Analytics

- In this report we are checking which titles had the most requests.

- "Num of requests" from the "Digital Waitlist Measures" folder is sorted descending.

- We can also see not only how many requests were made, biut of those requests how many had an actual session and how many did not.

Digital fulfillment patron waitlist in Alma Analytics

- We see here for example that "Linear algebra with applications" had the most requests.

- There were 727 requests. 703 had actual viewing sessions while 24 did not.

- The average session was 157 minutes.

Num of requests in Patron Waitlist for Digital Resources

Num of Requests	Num of Requests with No Sessions	Num of Sessions	Avg Actual Session Length (Min)	Title
727	24	703	157	Linear algebra with applications /
439	0	439	166	Psychology /
360	82	278	117	Hesiod's Theogony /
357	0	357	154	3-D negotiation : powerful tools to change the game in your most important deals /
325	4	321	171	The United States and imperialism /
294	32	262	150	Metamorphoses : a new verse translation /

Thank you!

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