



Digital Fulfillment in Alma

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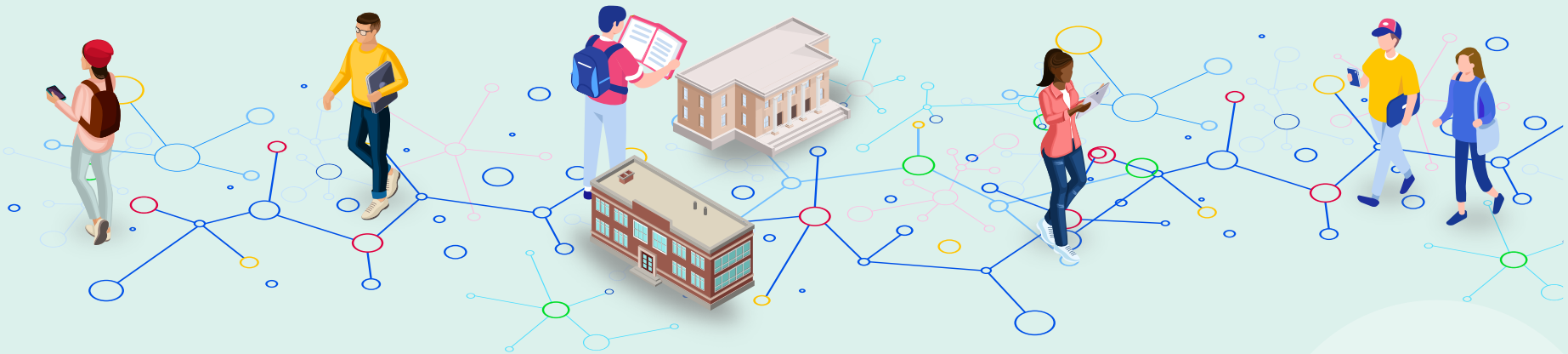
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Agenda

- 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



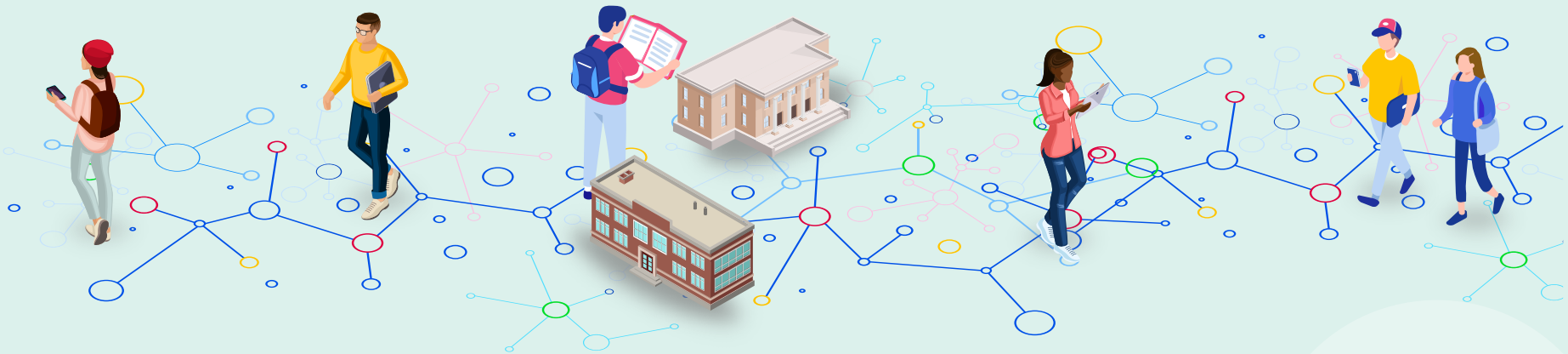


Introduction

- 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.

Introduction

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



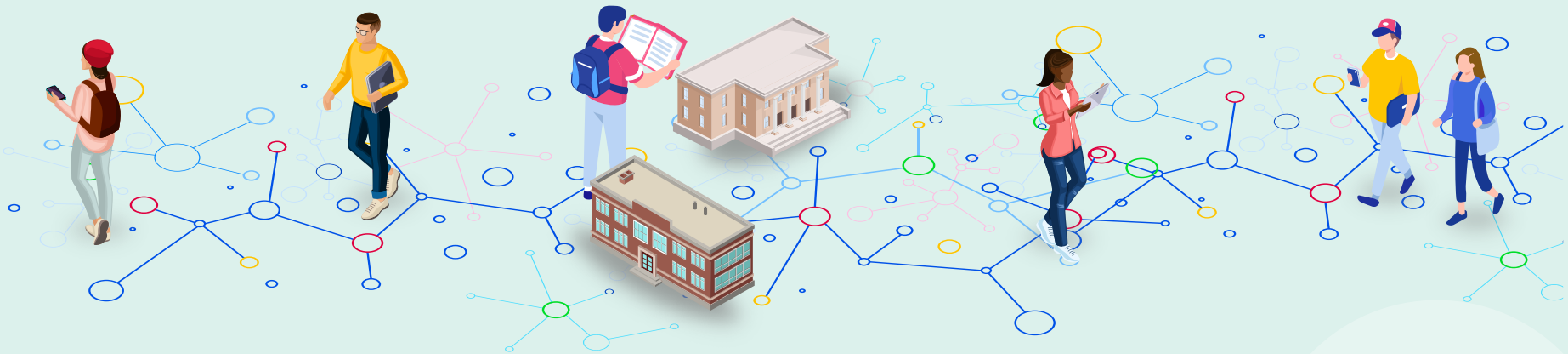
The steps to set it up

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

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

The "Denied Note" will appear to the end user in Primo when access is denied.

< Access Rights Policy

The YLK 1 concurrent user Access Rights Policy

Details

Name*

Copyrights

Description

Denied Note

Denied Note (override for unregistered users)

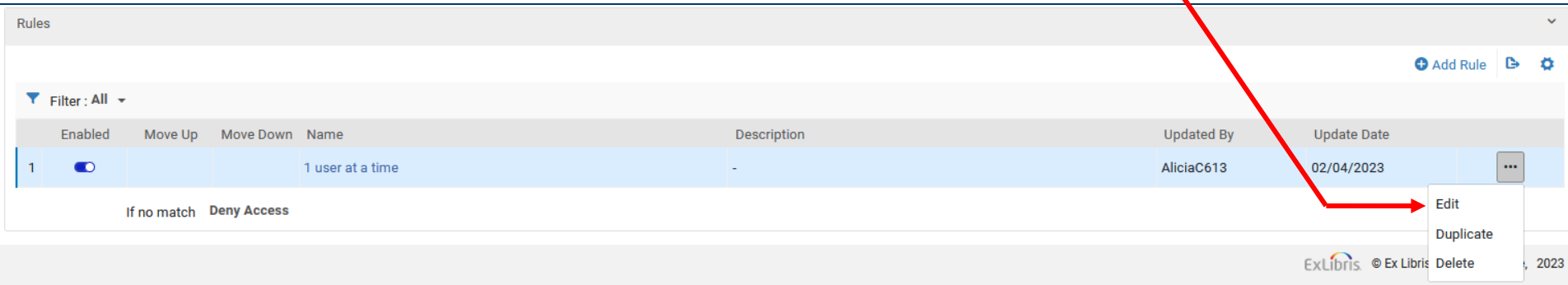
The "Denied Note (override for unregistered users)" will appear to an end user who did not login in Primo when access is denied. If this field is blank, then the "Denied Note" will appear instead.

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

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



Rules

Filter: All

Enabled Move Up Move Down Name Description Updated By Update Date

Enabled	Move Up	Move Down	Name	Description	Updated By	Update Date	
1	<input type="checkbox"/>	<input type="checkbox"/>	1 user at a time	-	AliciaC613	02/04/2023	...

If no match Deny Access

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Actions: Add Rule, Duplicate, Delete

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

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

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.

Defining the Access Rights with Waitlist Management

- Here is the remainder of the access rights rule

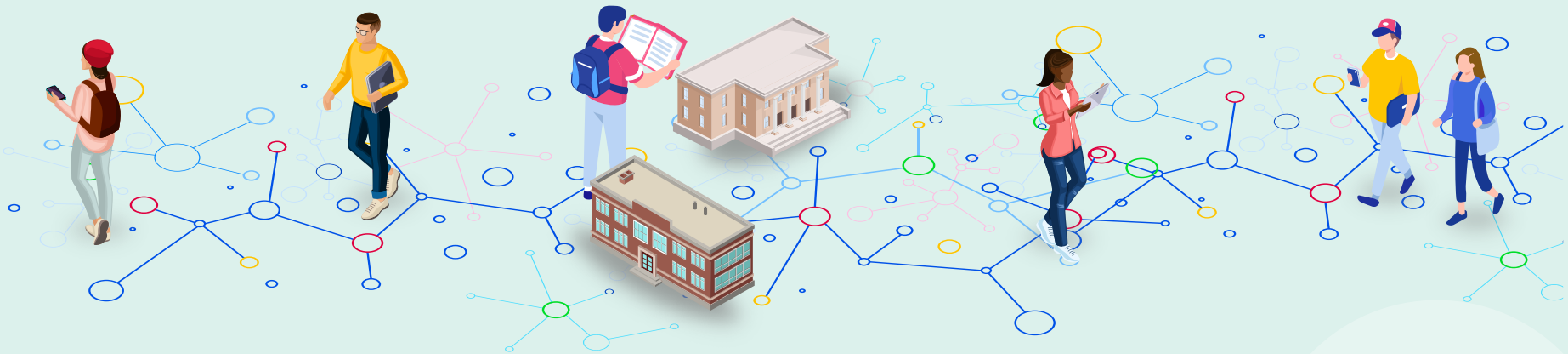
"Manage Access Waitlist" needs to be checked for the Waitlist to be in use

The screenshot shows the 'Waitlist Management' configuration page. It includes a 'Waitlist Management' header, a 'Manage Access Waitlist' checkbox (checked), a 'Grace Period (minutes)*' input field (10), a 'Limit Waitlist to Specific Hours' checkbox (unchecked), and 'From' and 'To' time input fields. Below this is an 'Output' section with 'Allow View' (checked) and 'Allow Download' (unchecked) checkboxes. Red arrows point from callout boxes to these specific elements.

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

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

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"

The screenshot shows the record page for "Outrageous and Everyday: The Papers of Gloria Steinem". The record details include: Journal By Izzo, Amanda (Thousand Oaks, CA : Sage Publications Ltd, 2016), Language: English, Subject: Feminist theory Feminism, Creation Date: -, and Modification Date: -. There are 1 Digital item, 1 Collection, and other details. The MMS ID is 99111208. A dropdown menu is open, showing options: Representations, Add Representation, Order, Add Holdings, Publishing information, Resource sharing request, Linked Data, Add Reminder, View It, and Display in Discovery. A red box highlights the "Representations" option, and a red arrow points from a text box to it.

1 **Outrageous and Everyday: The Papers of Gloria Steinem** Edit Record Push to MDE ...

Journal By Izzo, Amanda (Thousand Oaks, CA : Sage Publications Ltd, 2016) **Language:** English

Subject: Feminist theory Feminism

Creation Date: -

Modification Date: -

● Digital (1) Collections (1) Other details

MMS ID: 99111208

- Representations
- Add Representation
- Order
- Add Holdings
- Publishing information
- Resource sharing request
- Linked Data
- Add Reminder
- View It
- Display in Discovery

The access right will be added to the representation

Applying the Access Rights to a Digital Resource

The screenshot shows the 'Digital Representation Resource Editor' interface. At the top, there are tabs for 'General Information', 'Files List', 'Notes', and 'History'. Below the tabs is a 'Properties' section with various fields: 'Active' (radio buttons), 'Usage Type' (dropdown menu set to 'Derivative'), 'Library' (dropdown menu set to 'Main Library'), 'PO Line', 'Label', 'Auto-Generate Label' (button), 'Public Note', 'Access rights' (field containing 'The YLK 1 cc' with a dropdown arrow), 'Copyrights' (dropdown menu), and 'Entity Type' (dropdown menu set to 'Article'). A red box highlights the 'Access rights' field and its dropdown menu, which is open to show 'The YLK 1 concurrent user Access Rights Policy'. A red arrow points from a text box to the 'Access rights' field.

Relin

General Information Files List Notes History

Properties

Active Inactive

Usage Type * Derivative Library * Main Library

PO Line

Label

Auto-Generate Label

Public Note

Access rights The YLK 1 cc

Copyrights

Entity Type Article The YLK 1 concurrent user Access Rights Policy

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

The screenshot displays the search interface for digital titles. At the top, there is a blue header bar with a magnifying glass icon, a search bar containing 'Digital titles' and 'Title', and navigation icons for home and search. Below the header, the search criteria are shown: 'Search in: Digital titles', 'Zone: Institution' (selected), and 'Community'. The main search area contains three dropdown menus: 'Representation: Access Ri', 'Equals', and 'The YLK 1 concurrent user'. Below these is a text input field with the placeholder 'Access Rights Policy Name'. To the right of the input field are 'Clear form' and 'Search' buttons. A close button (X) is located in the top right corner of the search area.



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”

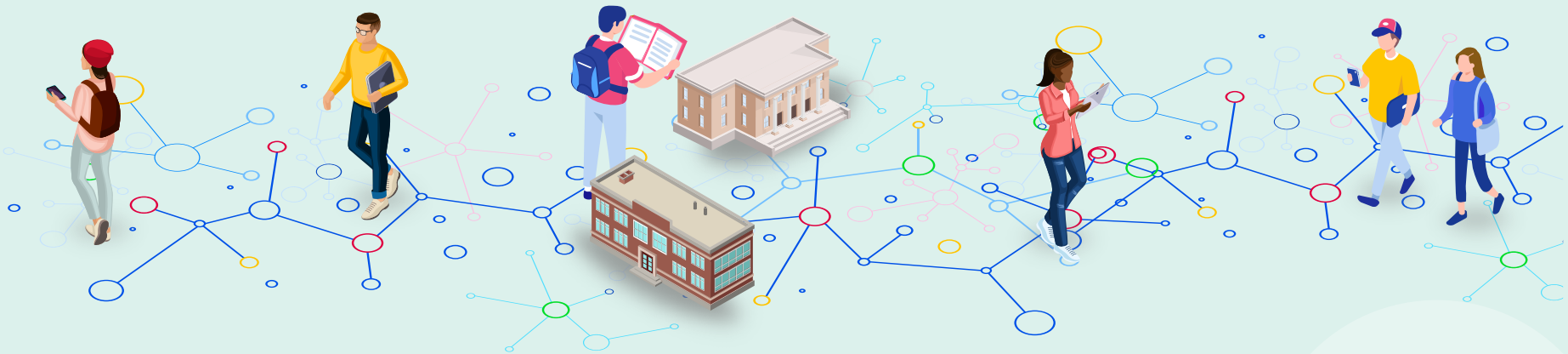
Digital Titles (1 - 2 of 2) [where \(Access Rights Policy Name equals "7115075510000121"\)](#) Push Selected to MDE Save and Filter Query

[Institution](#) [Community](#)

Select All Sort by: Rank Secondary Sort by: Rank 0 rows selected Expand Share Settings

1	<input type="checkbox"/>		On the Shoulders of Giants: Some Reflections on Feminist Historiography Journal By Davis, Kathy (Thousand Oaks, CA : Sage Publications Ltd, 2016) Subject: Feminist theory Feminism Creation Date: - Modification Date: -	Language: English	MMS ID: 99111208400121	Edit Record Push to MDE ...
2	<input type="checkbox"/>		Outrageous and Everyday: The Papers of Gloria Steinem Journal By Izzo, Amanda (Thousand Oaks, CA : Sage Publications Ltd 1994) Subject: Feminist theory Feminism Creation Date: 04/04/2017 17:48 Modification Date: 22/03/2023 08:12	Language: English	MMS ID: 99111208700121	Edit Record Push to MDE ...

[Digital \(1\)](#) [Collections \(1\)](#) [Other details](#)



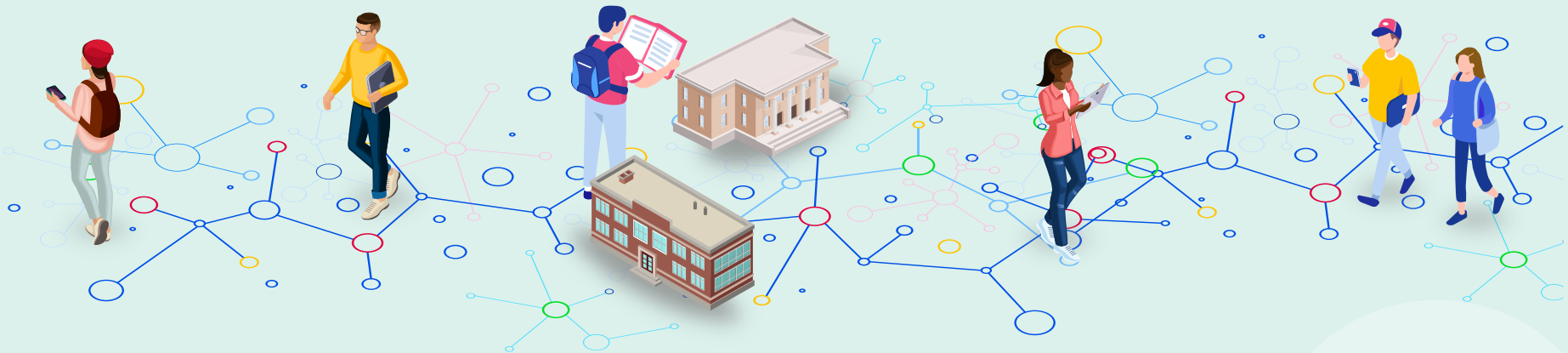
The flow of the patrons using Patron Waitlist

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

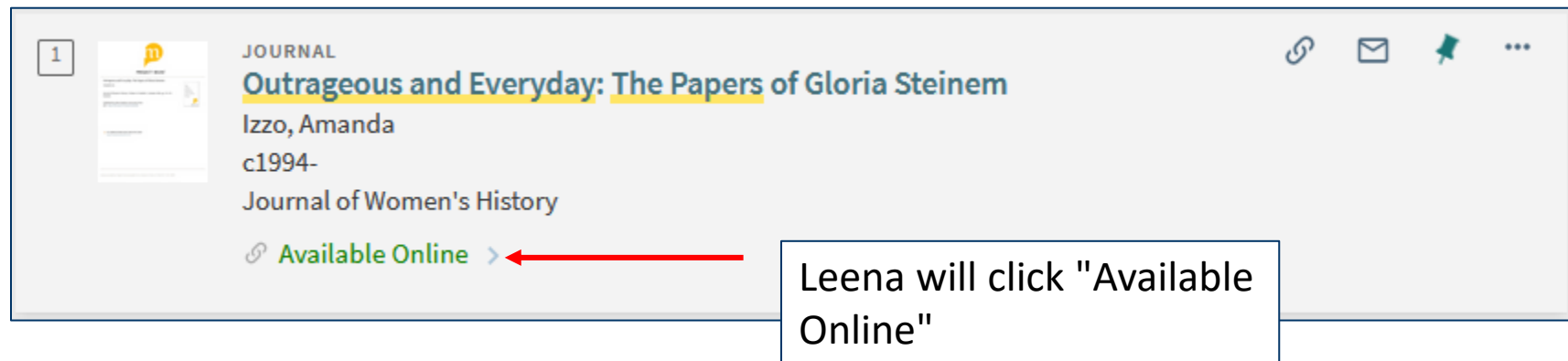
- In our example
 - “User A” is Leena Alam
 - “User B” is Anna Nemati



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.



The screenshot shows a Primo search result for a journal. On the left, there is a small thumbnail of the journal cover with a '1' in a box next to it. The main text reads: 'JOURNAL', 'Outrageous and Everyday: The Papers of Gloria Steinem', 'Izzo, Amanda', 'c1994-', and 'Journal of Women's History'. Below this, there is a green link that says 'Available Online >'. A red arrow points from a white callout box on the right to this link. The callout box contains the text 'Leena will click "Available Online"'. In the top right corner of the search result area, there are icons for a link, an email, a pin, and a menu.

Testing the flow of the patrons using Patron Waitlist

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


The screenshot shows a web interface for viewing a digital object. At the top, it says "View Online". Below that is a yellow banner with the text "Additional services may be available if you sign in" and a "Sign in" button. Underneath is a section titled "Digital Version(s) Availability" with the subtext "Showing 1 of 1 results". A single result is shown: "Alma viewer" with "1 file/s (pdf)" and a lock icon. A red box highlights a message: "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

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

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.

ExLibris

Leena Alam

Outrageous and Everyday
of Gloria Steinem

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 as... Though she was not a pioneer of the... singled her out for her beauty and charismatic representative of women's liberation... erful symbol of feminism.
I began work on the Steinem paper...

Description

Title:
Outrageous and Everyday:
The Papers of Gloria Steinem

Material Type:
Journal

RETURN EARLY

Testing the flow of the patrons using Patron Waitlist

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

The screenshot displays the ExLibris interface. At the top left is the ExLibris logo. At the top right, the user's name 'Leena Alam' is shown in a red-bordered box. Below the header, the title 'Outrageous and Everyday: The Papers of Gloria Steinem' is visible. A red-bordered box highlights a notification that says 'Remaining session time: 0:02:55' with a close button. To the right of this notification are icons for sharing, a timer, and a 'RETURN EARLY' button. The main content area shows the book's title and author, 'Amanda Izzo', followed by a paragraph of text starting with 'As an archives assistant for the Sophia Smith Collection...'. On the right side, there is a 'Description' sidebar with fields for 'Title', 'Material Type', and 'Creator'.

Testing the flow of the patrons using Patron Waitlist

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

The screenshot displays the ExLibris user interface. At the top left is the ExLibris logo, and at the top right is the user name 'Leena Alam'. The main header shows the title 'Outrageous and Everyday: The Papers of Gloria Steinem' and a subtitle 'Outrageous and Everyday The Papers of Gloria Steinem'. Below the header is a navigation bar with search, navigation, and zoom controls. The main content area shows the title 'OUTRAGEOUS AND EVERYDAY: The Papers of Gloria Steinem' by Amanda Izzo. A white warning dialog box is centered on the screen, displaying the text: 'Warning: Your session will expire in 49 seconds' with an 'OK' button. On the right side, there is a 'Description' panel with fields for 'Title', 'Material Type', and 'Creator'. The 'Title' field contains 'Outrageous and Everyday: The Papers of Gloria Steinem', the 'Material Type' is 'Journal', and the 'Creator' field is empty.

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

The screenshot shows a 'View Online' section with a heading 'Digital Version(s) Availability' and a sub-heading 'Showing 1 of 1 results'. Below this, there is a list item for 'Alma viewer' with a file size of '1 file/s (pdf, 498.04 KB)'. A red rectangular box highlights a message icon and the text: 'The maximum number of concurrent users viewing the resource has been reached, please select the link to register'. A small square icon with a checkmark is visible in the top right corner of the list item.

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)

Testing the flow of the patrons using Patron Waitlist

- 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

Testing the flow of the patrons using Patron Waitlist

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



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 stating 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.



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

The screenshot displays the ExLibris digital library interface. At the top left is the ExLibris logo. The main header area shows the title "Outrageous and Everyday: The Papers of Gloria Steinem". Below this, a search bar and navigation icons are visible. A red box highlights the user name "Anna Nemati" in the top right corner, with a red arrow pointing to it from a text box. The text box contains the text "Anna is logged in and views the digital object". The main content area shows a digital object viewer with a toolbar at the top (including a search icon, up/down arrows, "1 of 4", zoom in/out, "Automatic Zoom", and a refresh icon). The viewer displays the title "Outrageous and Everyday: The Papers of Gloria Steinem" by Amanda Izzo, published in "Journal of Women's History, Volume 14, Number 2, Summer 2002, pp. 151-153 (Article)". A thumbnail of the book cover is visible on the right side of the viewer. On the right side of the interface, there is a sidebar with a "RETURN EARLY" button and a "Description" section. The description includes the title, a description of the content as "Feminist Studies Scholarly Articles", and an "other subject:" field.

ExLibris

Anna Nemati

Outrageous and Everyday: The Papers of Gloria Steinem

Outrageous and Everyday: The Papers of Gloria Steinem

Amanda Izzo

Journal of Women's History, Volume 14, Number 2, Summer 2002, pp. 151-153 (Article)

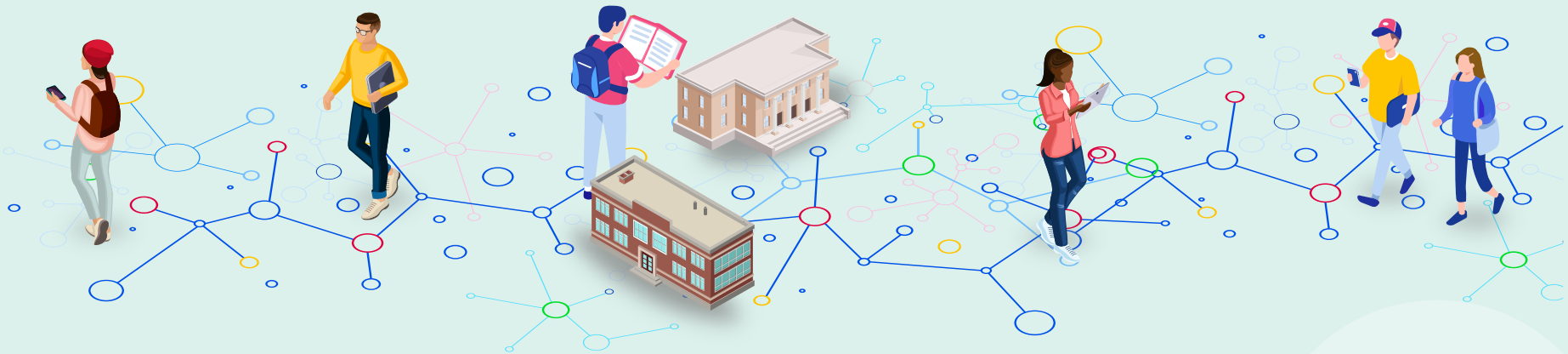
The Johns Hopkins University Press

» Description

Title:
Outrageous and Everyday: The Papers of Gloria Steinem

Description:
Feminist Studies Scholarly Articles

other subject:



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, but of those requests how many had an actual session and how many did not.

The screenshot shows the Alma Analytics interface. At the top, there are tabs for 'Criteria', 'Results', 'Prompts', and 'Advanced'. Below these is a search bar with the text 'Subject Ar...' and several icons. On the left sidebar, the 'Digital Waitlist' folder is highlighted with a red box. Below it are sub-folders: 'Digital Waitlist Measures', 'Digital Waitlist Details', and 'Bibliographic Details'. The main area shows the 'Selected Columns' section, which is divided into two columns: 'Bibliographic Details' and 'Digital Waitlist Measures'. The 'Digital Waitlist Measures' column contains four items: 'Title', 'Num of Requests', 'Avg Actual Session Length (Min)', 'Num of Requests with No Sessions', and 'Num of Sessions'. Each item has a gear icon for configuration.

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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