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Ex Libris Users Group - Israel

Fulfillment in Alma

Moshe Shechter

Alma Product Manager, Ex Libris

ExLibris

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Agenda

1. Fulfillment Units & Policies
2. Circulation Desks
3. Display Logic Rules
4. Labels
5. Direct Linking
6. General Electronic Services
7. Services Order

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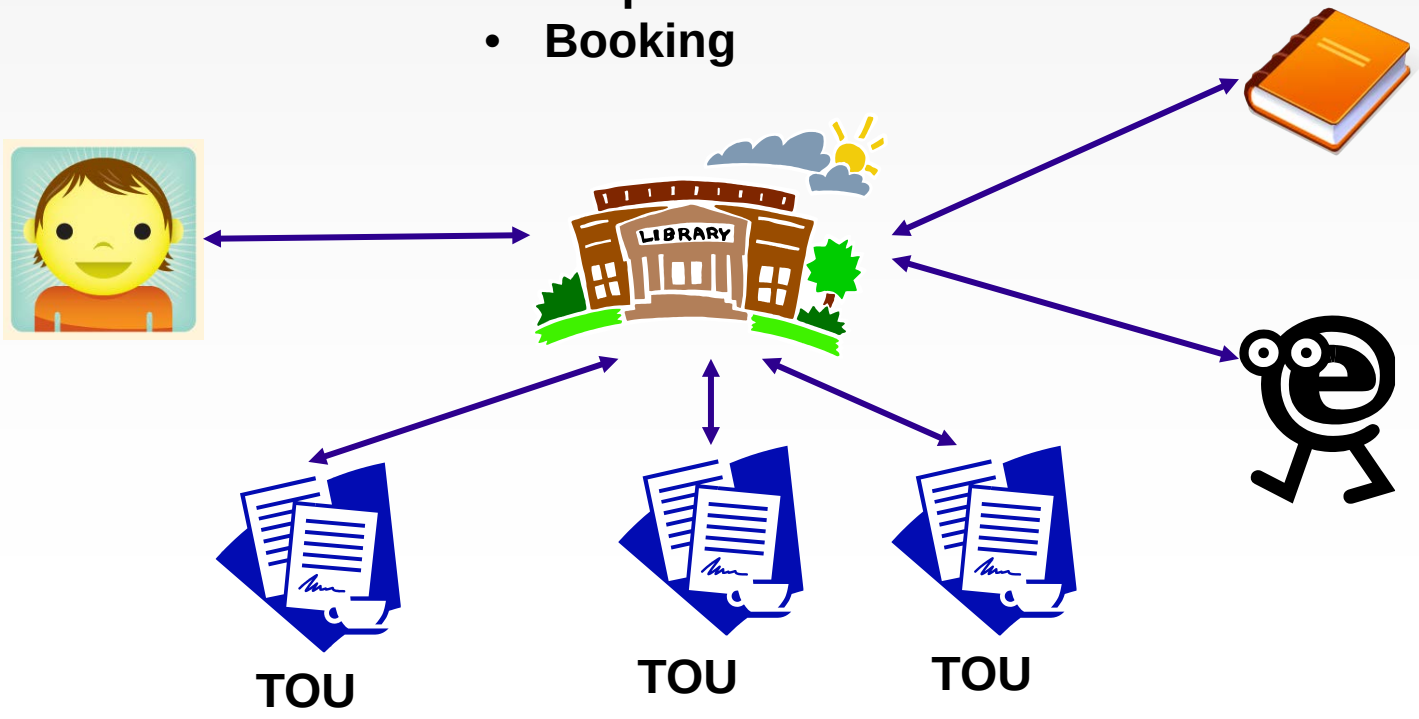
Fulfillment

- The act or process of delivering a product to a customer

(Merriam Webster)

- **Loan**
- **Request**
- **Booking**



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Fulfillment Units & Policies

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TOU & Policies

TOU

Policies

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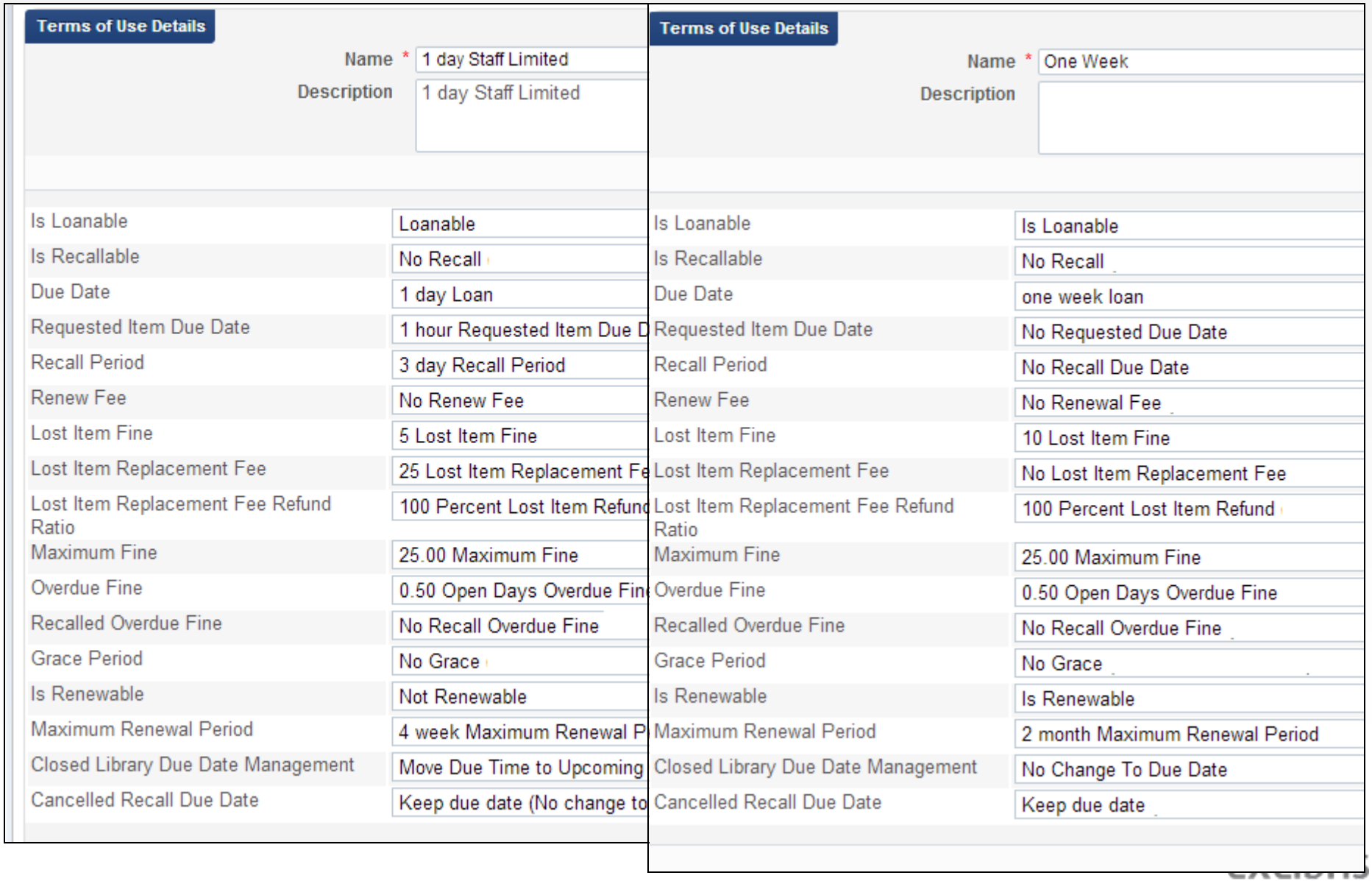
TOU & Policies - Loans



Terms of Use Details

Name *	1 day Staff Limited
Description	1 day Staff Limited
Is Loanable	Loanable
Is Recallable	No Recall
Due Date	1 day Loan
Requested Item Due Date	1 hour Requested Item Due D
Recall Period	3 day Recall Period
Renew Fee	No Renew Fee
Lost Item Fine	5 Lost Item Fine
Lost Item Replacement Fee	25 Lost Item Replacement Fe
Lost Item Replacement Fee Refund Ratio	100 Percent Lost Item Refund
Maximum Fine	25.00 Maximum Fine
Overdue Fine	0.50 Open Days Overdue Fine
Recalled Overdue Fine	No Recall Overdue Fine
Grace Period	No Grace
Is Renewable	Not Renewable
Maximum Renewal Period	4 week Maximum Renewal P
Closed Library Due Date Management	Move Due Time to Upcoming
Cancelled Recall Due Date	Keep due date (No change to

Terms of Use Details

Name *	One Week
Description	
Is Loanable	Is Loanable
Is Recallable	No Recall
Due Date	one week loan
Requested Item Due Date	No Requested Due Date
Recall Period	No Recall Due Date
Renew Fee	No Renewal Fee
Lost Item Fine	10 Lost Item Fine
Lost Item Replacement Fee	No Lost Item Replacement Fee
Lost Item Replacement Fee Refund Ratio	100 Percent Lost Item Refund
Maximum Fine	25.00 Maximum Fine
Overdue Fine	0.50 Open Days Overdue Fine
Recalled Overdue Fine	No Recall Overdue Fine
Grace Period	No Grace
Is Renewable	Is Renewable
Maximum Renewal Period	2 month Maximum Renewal Period
Closed Library Due Date Management	No Change To Due Date
Cancelled Recall Due Date	Keep due date

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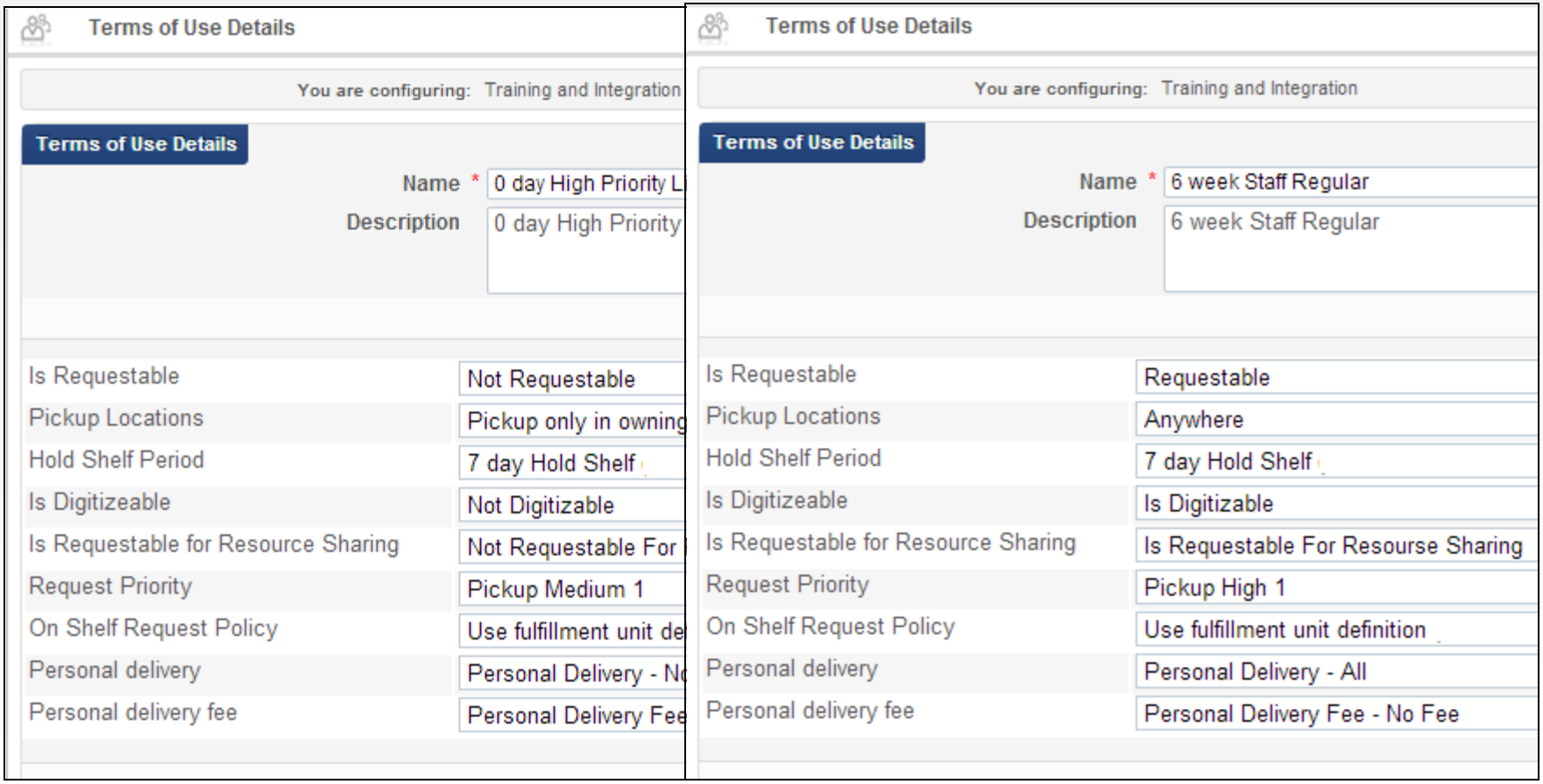
TOU & Policies - Requests



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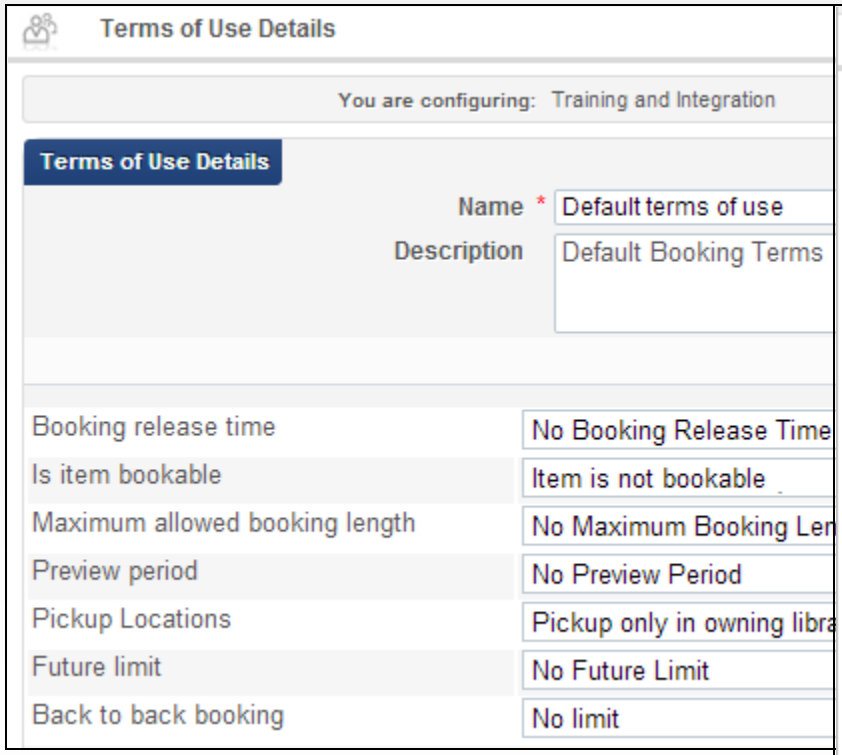
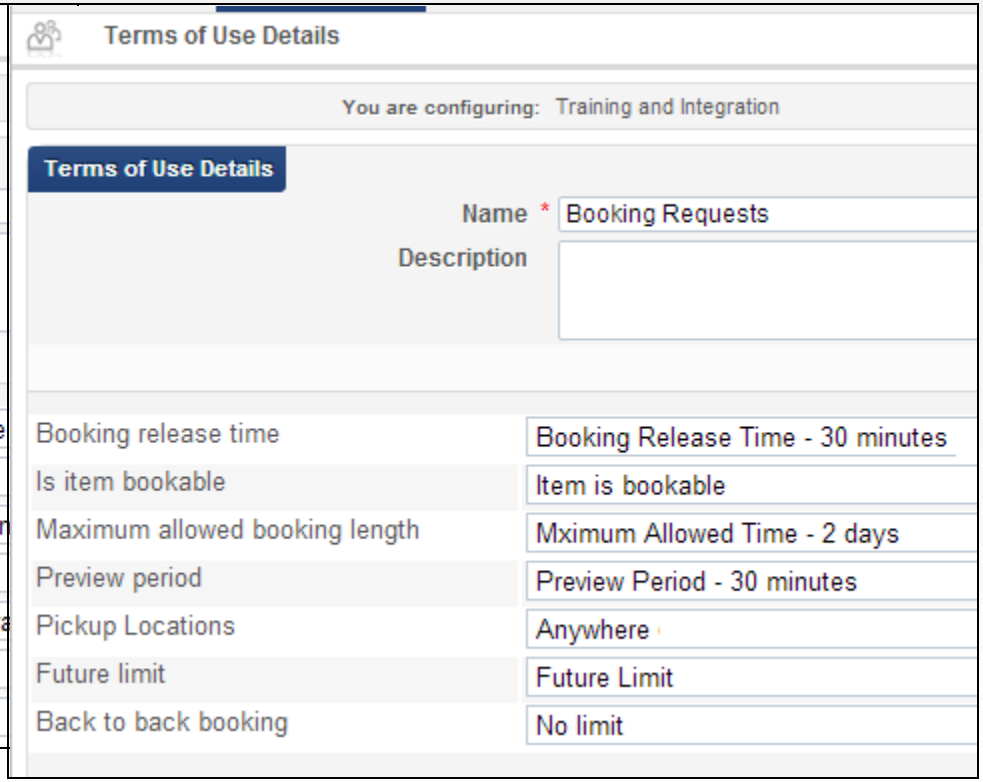
TOU & Policies - Bookings





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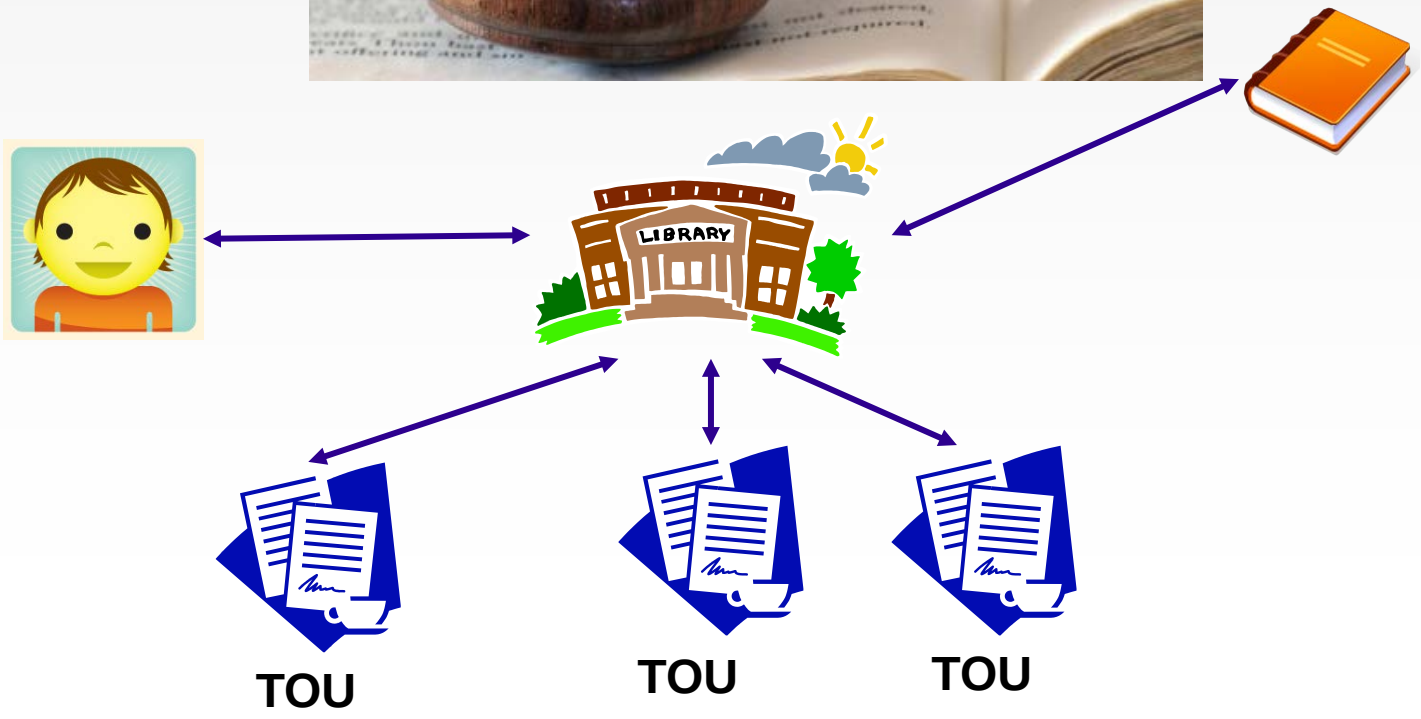
TOU Rules



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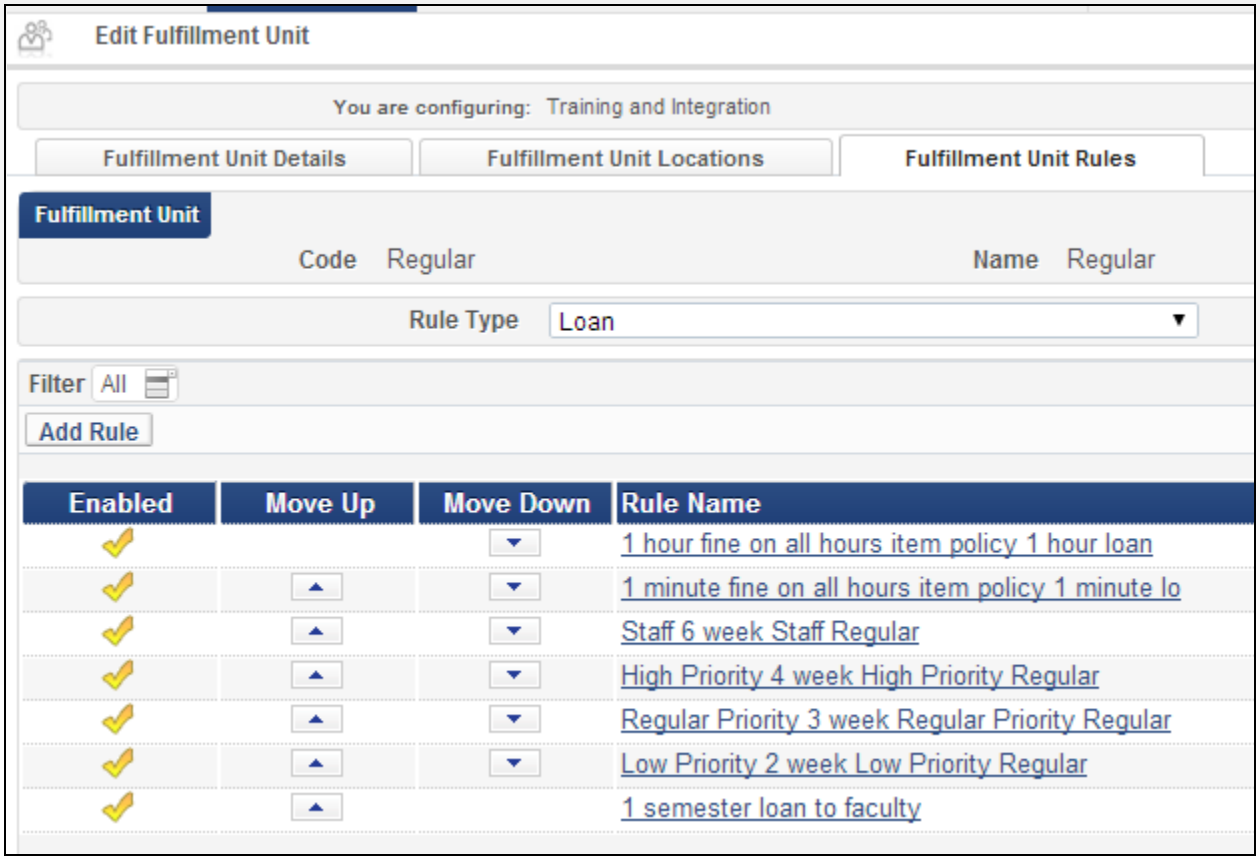
TOU Rules



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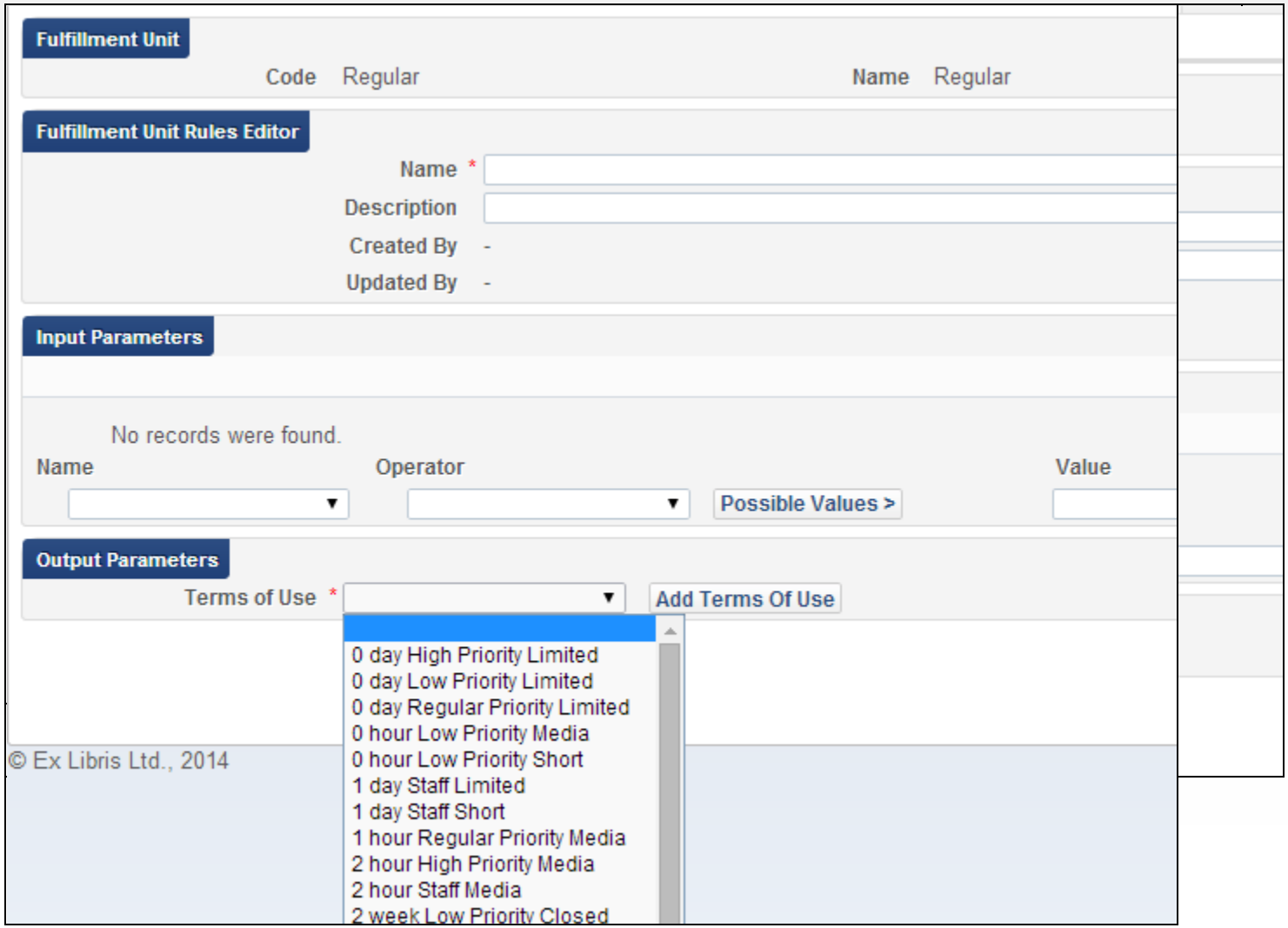
TOU Rules


Fulfillment Unit
Code Regular
Name Regular
Fulfillment Unit Rules Editor
Name *
Description
Created By -
Updated By -
Input Parameters
No records were found.
Name
Operator
Value
Possible Values >
Output Parameters
Terms of Use *
Add Terms Of Use
0 day High Priority Limited
0 day Low Priority Limited
0 day Regular Priority Limited
0 hour Low Priority Media
0 hour Low Priority Short
1 day Staff Limited
1 day Staff Short
1 hour Regular Priority Media
2 hour High Priority Media
2 hour Staff Media
2 week Low Priority Closed
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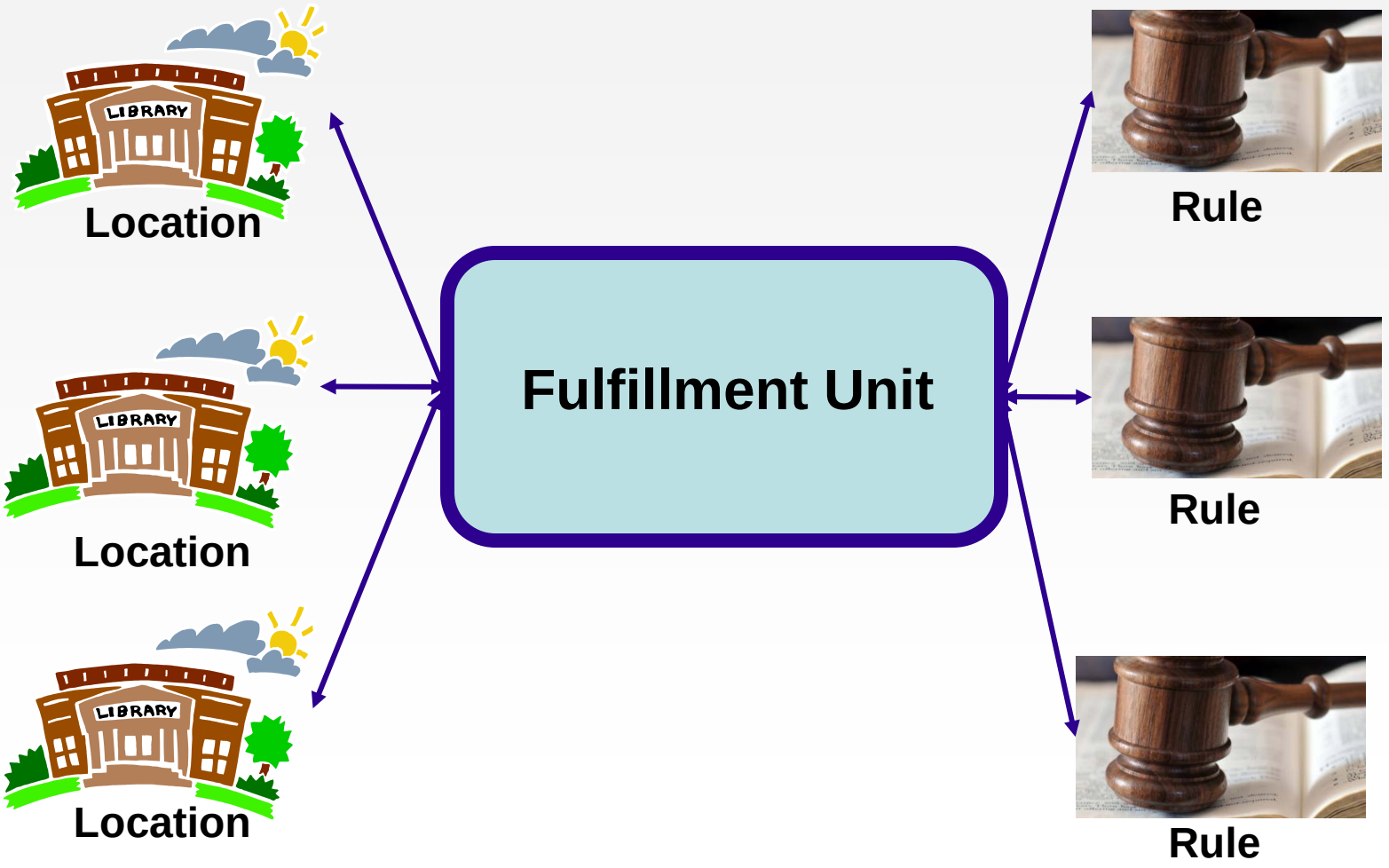
Fulfillment Units



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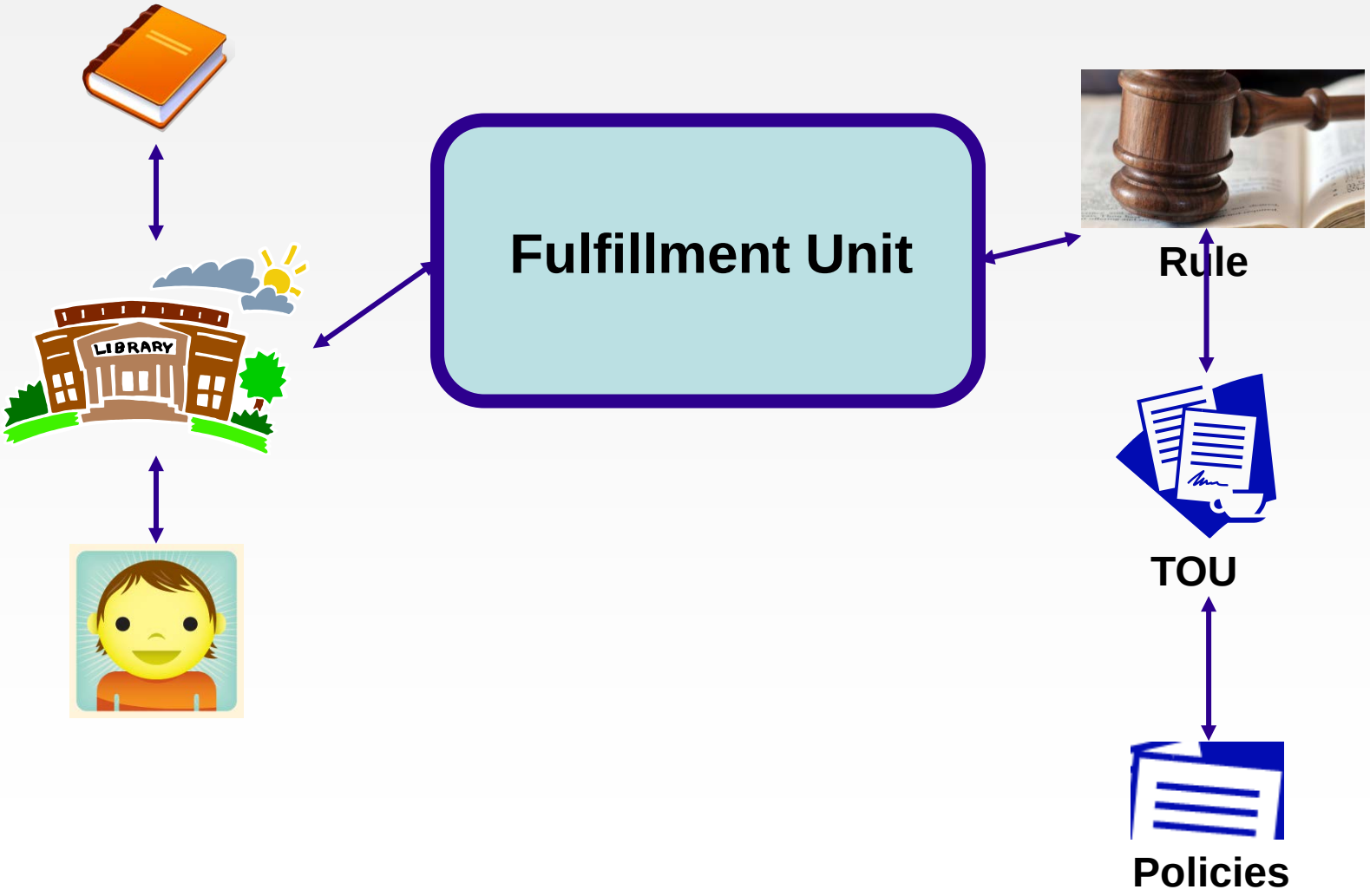
Fulfillment Units / Rules / TOUs / Policies



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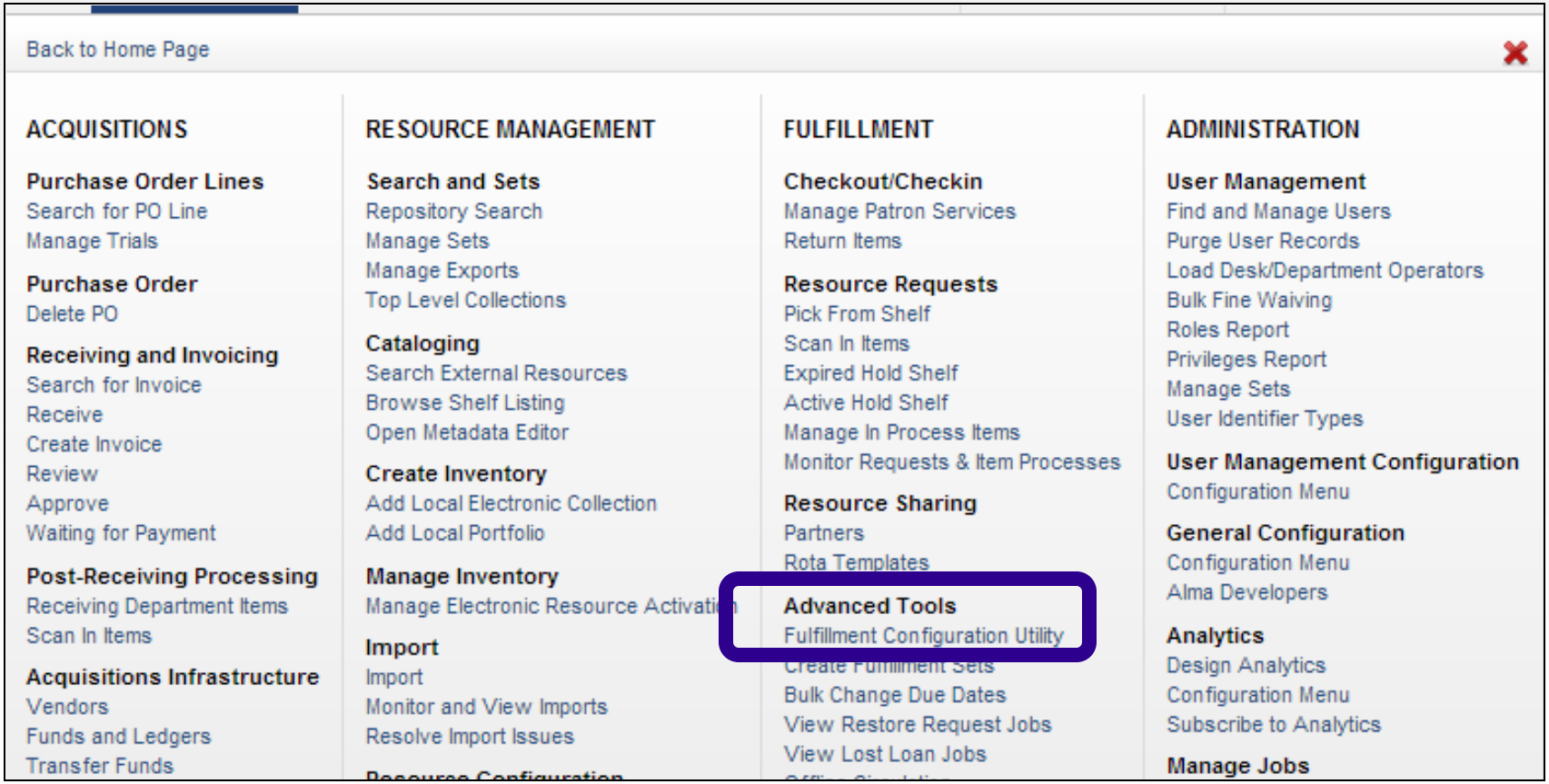
Loans' Relevant TOUs



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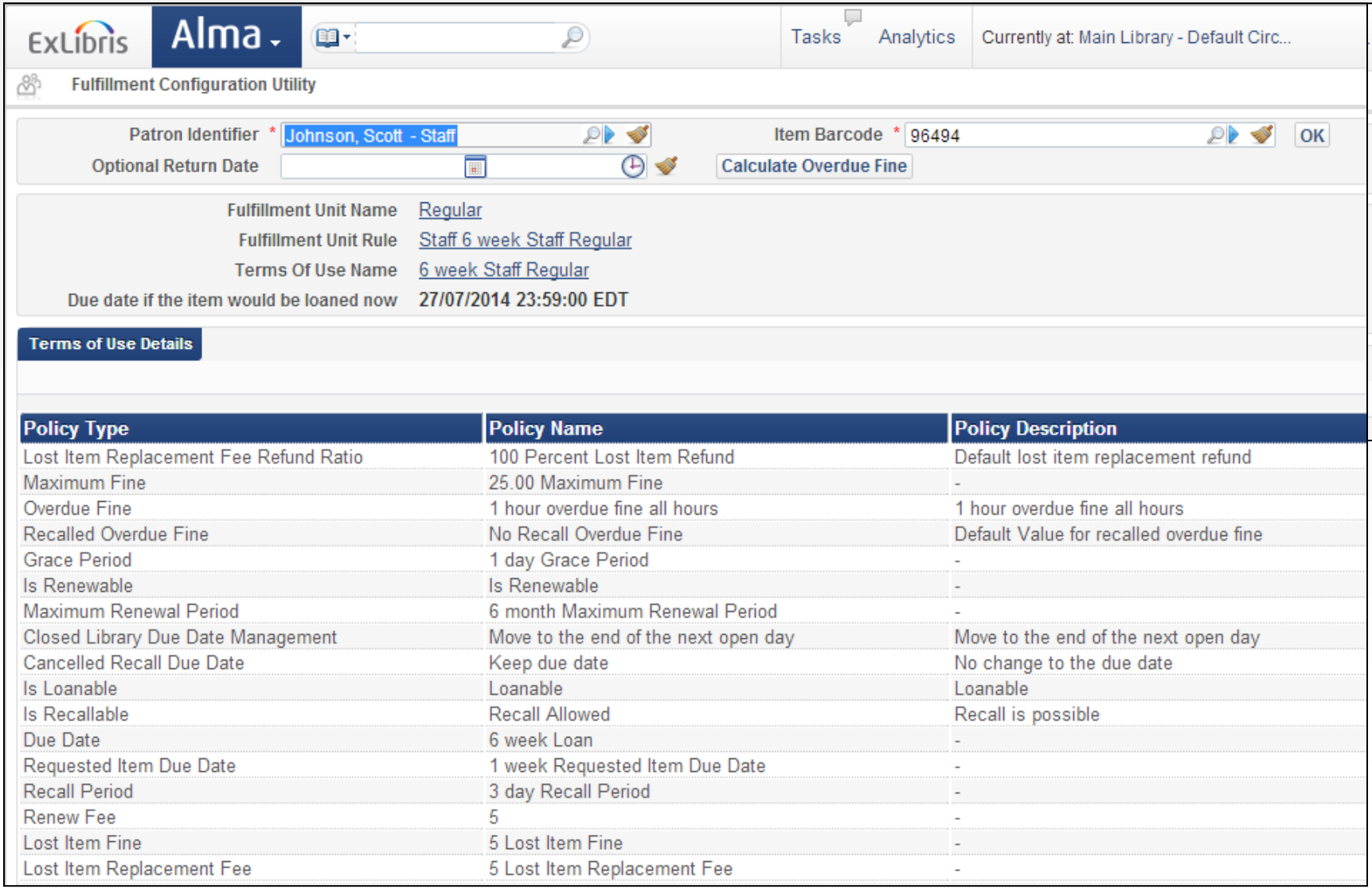
Loans' Relevant TOUs



Policy Type	Policy Name	Policy Description
Lost Item Replacement Fee Refund Ratio	100 Percent Lost Item Refund	Default lost item replacement refund
Maximum Fine	25.00 Maximum Fine	-
Overdue Fine	1 hour overdue fine all hours	1 hour overdue fine all hours
Recalled Overdue Fine	No Recall Overdue Fine	Default Value for recalled overdue fine
Grace Period	1 day Grace Period	-
Is Renewable	Is Renewable	-
Maximum Renewal Period	6 month Maximum Renewal Period	-
Closed Library Due Date Management	Move to the end of the next open day	Move to the end of the next open day
Cancelled Recall Due Date	Keep due date	No change to the due date
Is Loanable	Loanable	Loanable
Is Recallable	Recall Allowed	Recall is possible
Due Date	6 week Loan	-
Requested Item Due Date	1 week Requested Item Due Date	-
Recall Period	3 day Recall Period	-
Renew Fee	5	-
Lost Item Fine	5 Lost Item Fine	-
Lost Item Replacement Fee	5 Lost Item Replacement Fee	-

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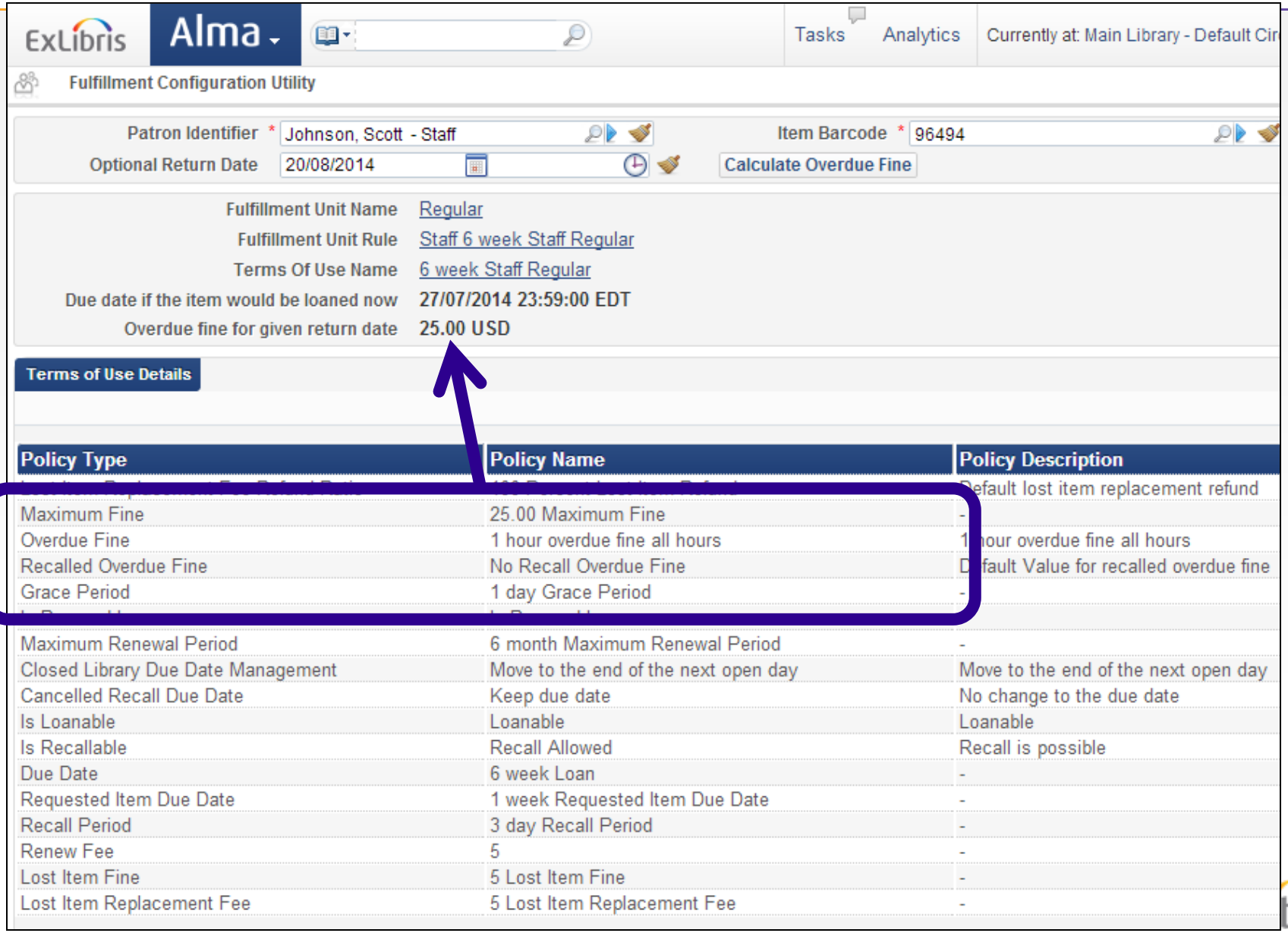
Loans' Relevant TOUs



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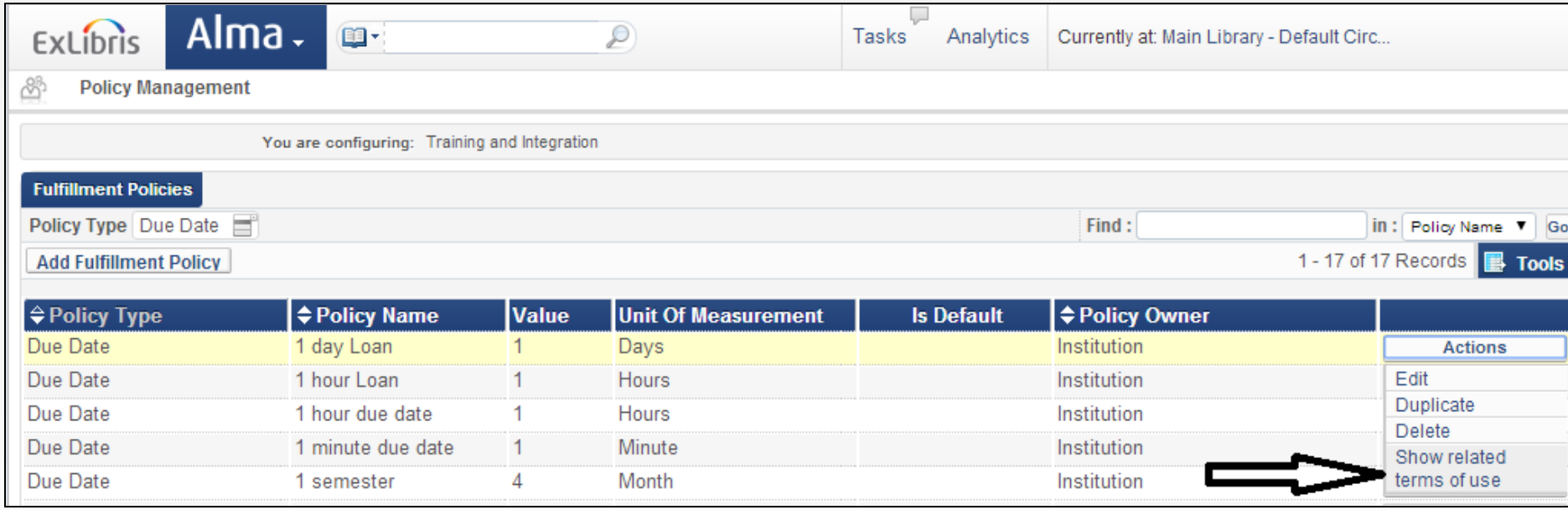
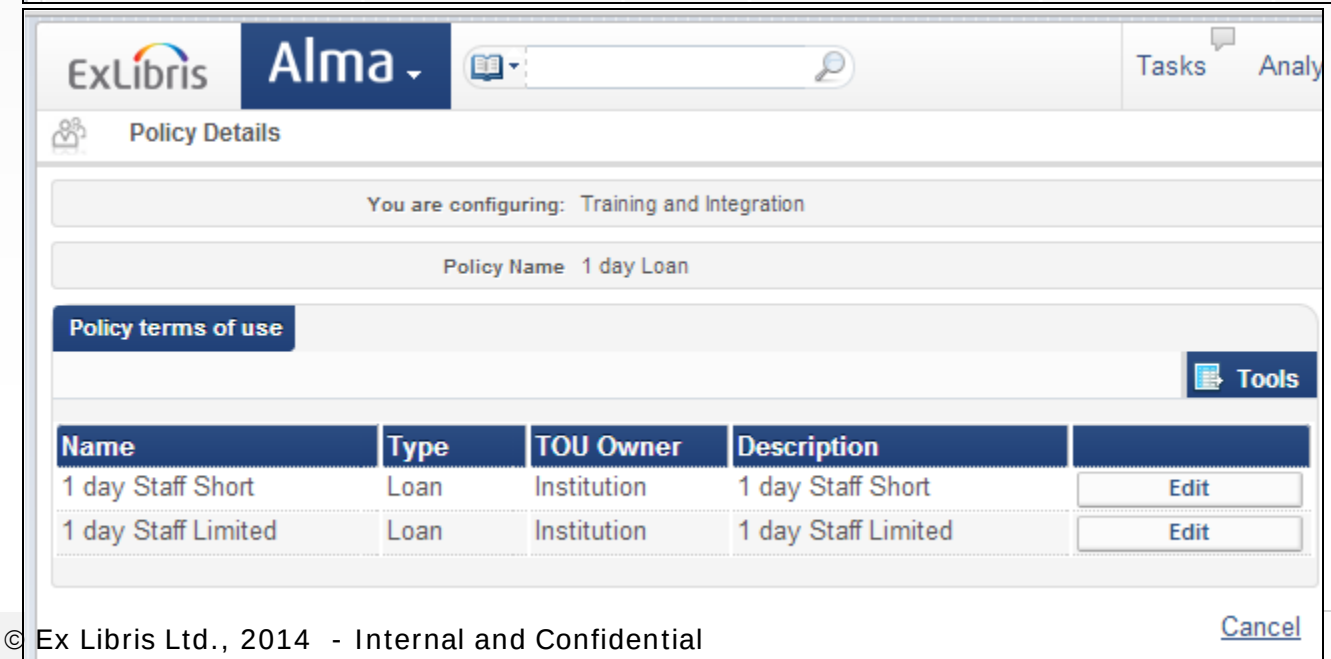
Policies -> TOUs





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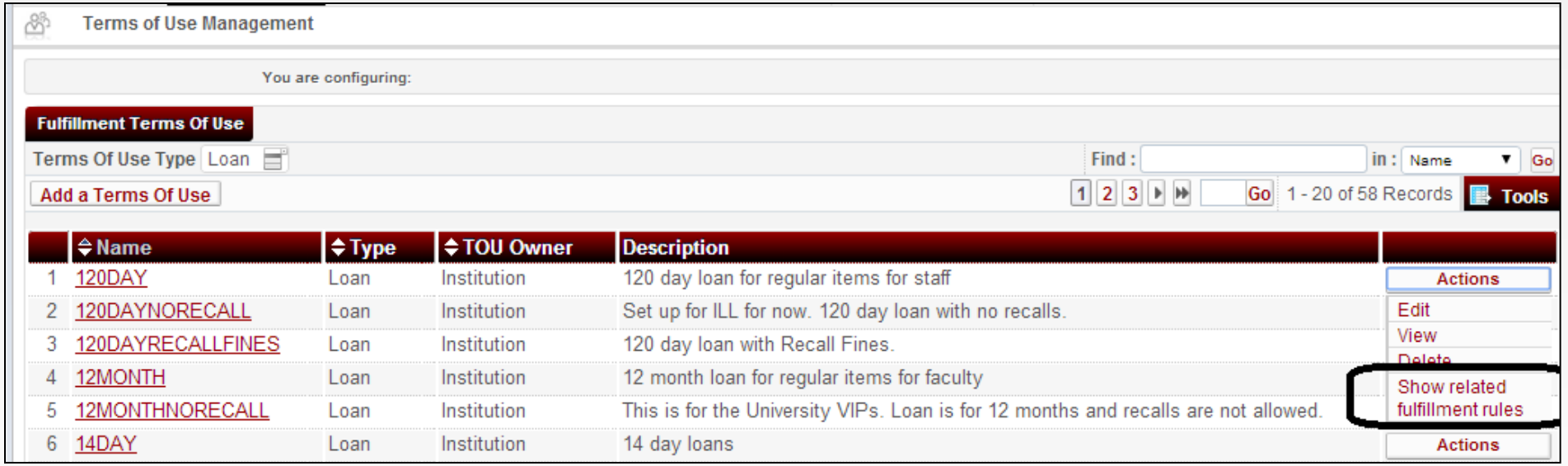
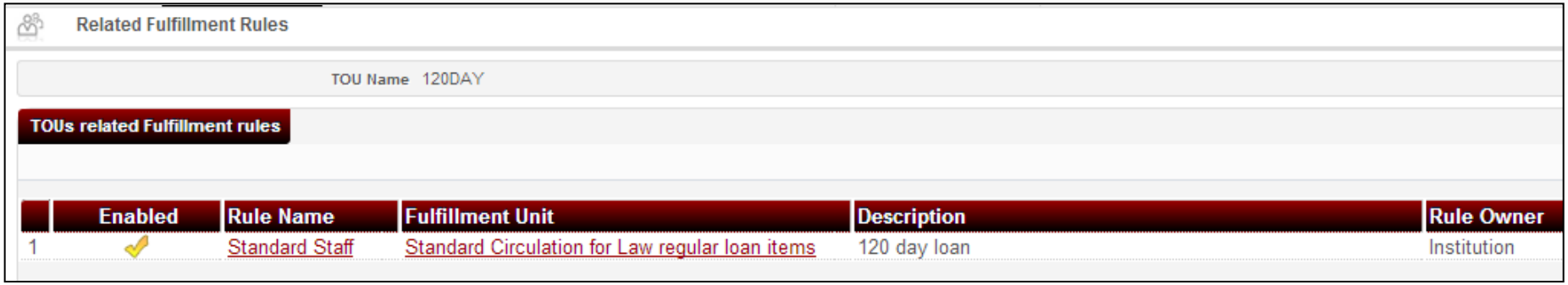
TOUs -> Rules





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Circulation Desks

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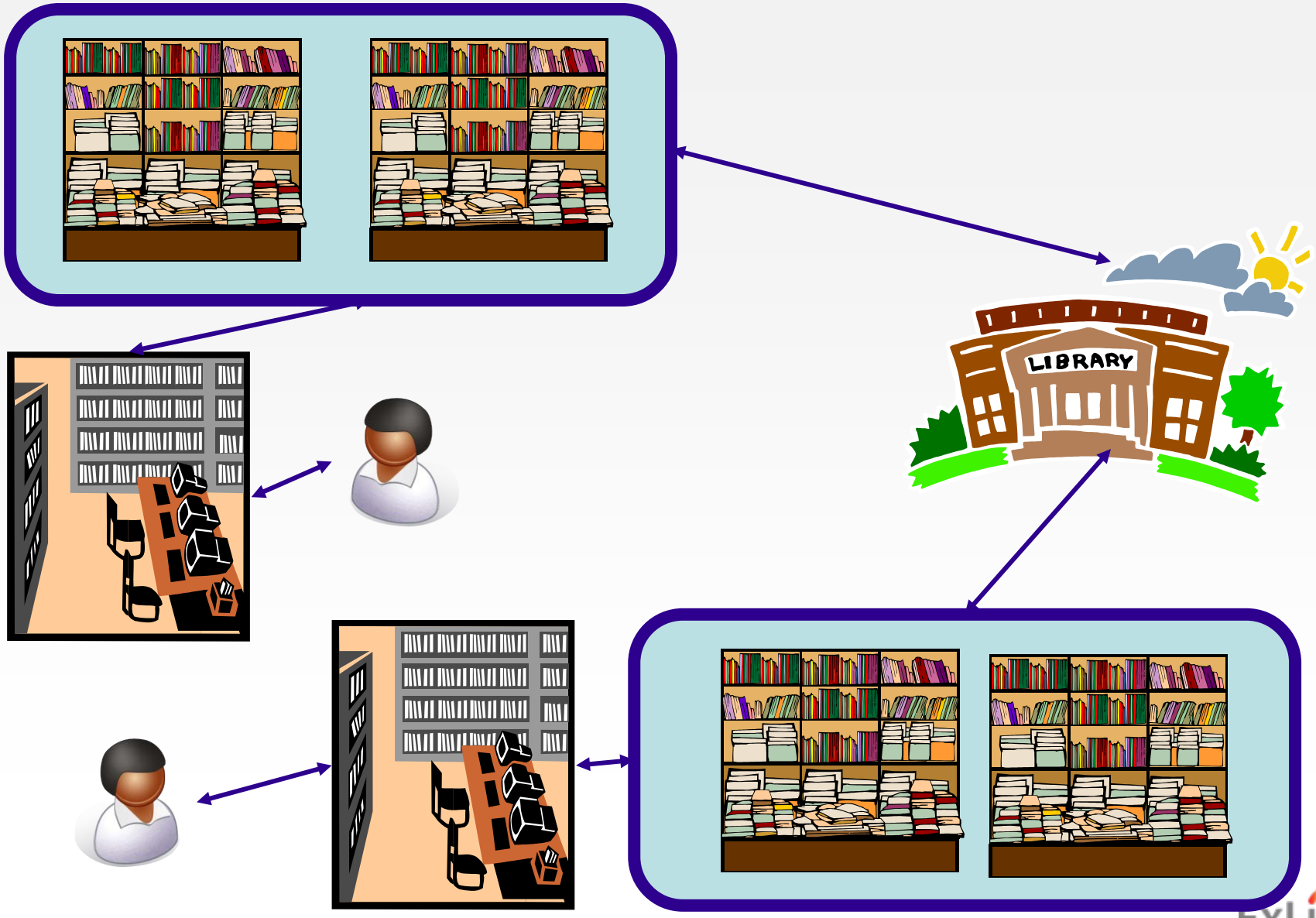
Circulation Desks



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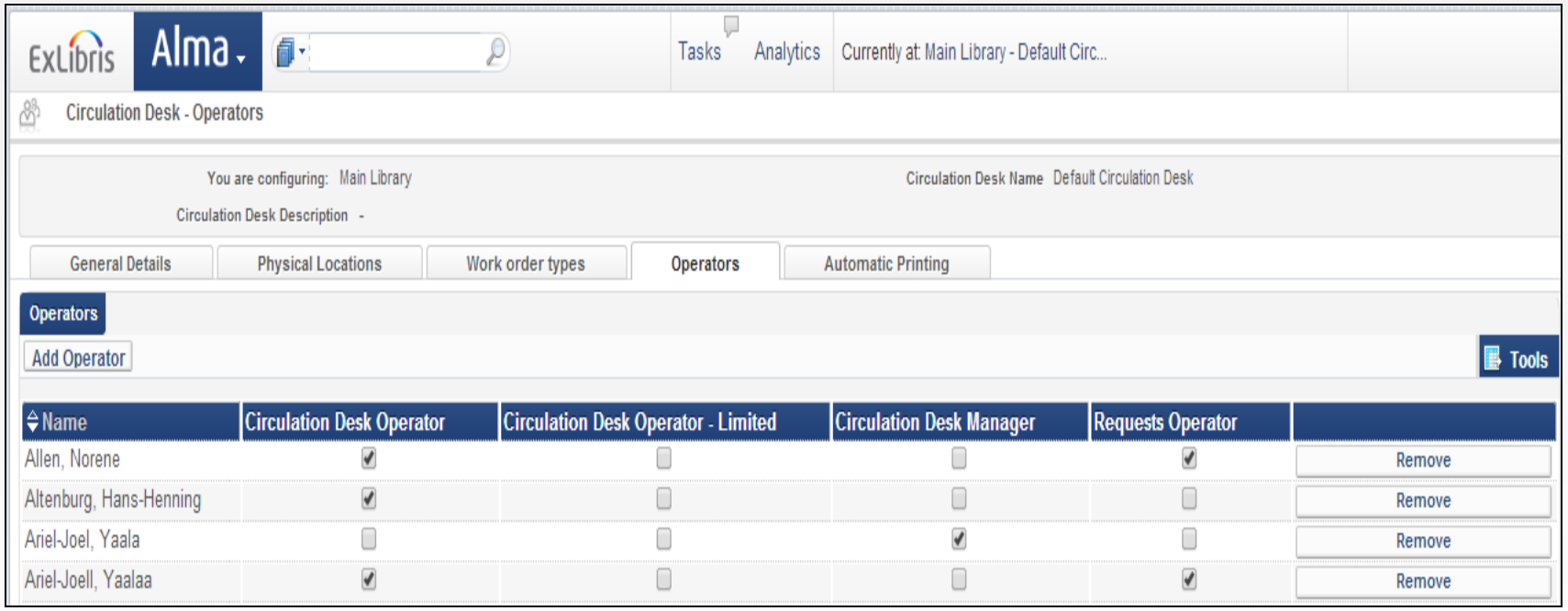
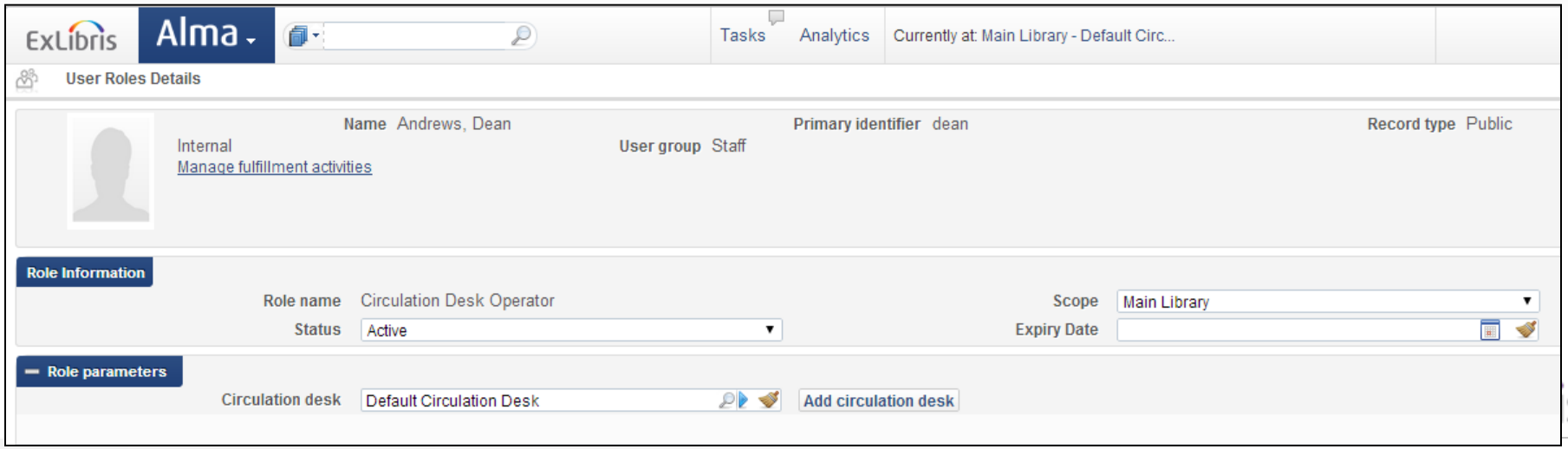
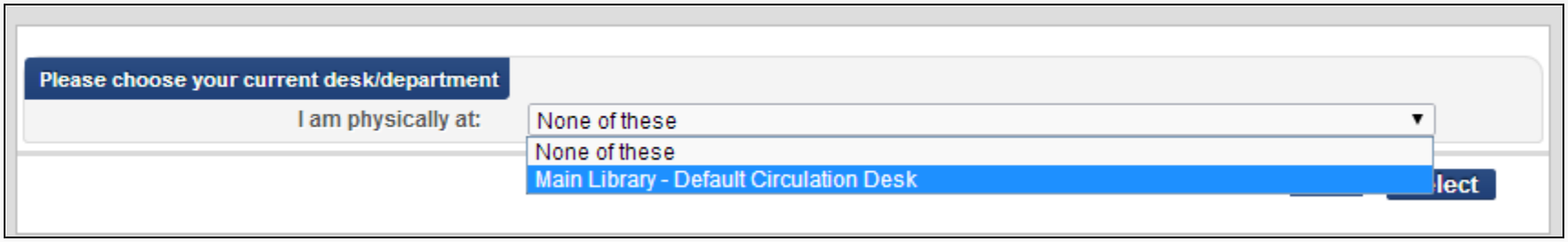
Circulation Desk Operators



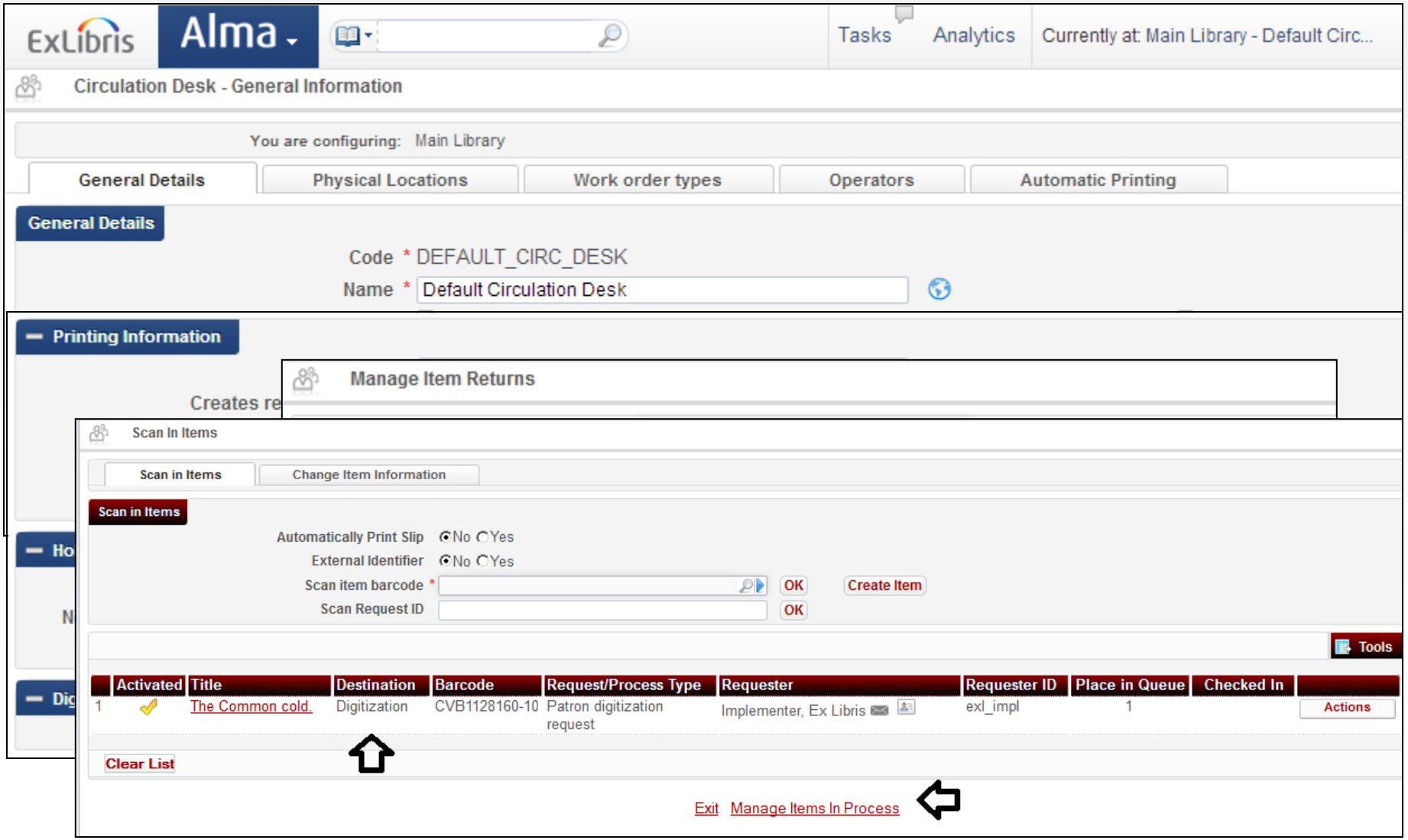


Circulation Desk Operators



58		force_location_selection_on_login	general	false

Circulation Desk Attributes



Circulation Desk Attributes

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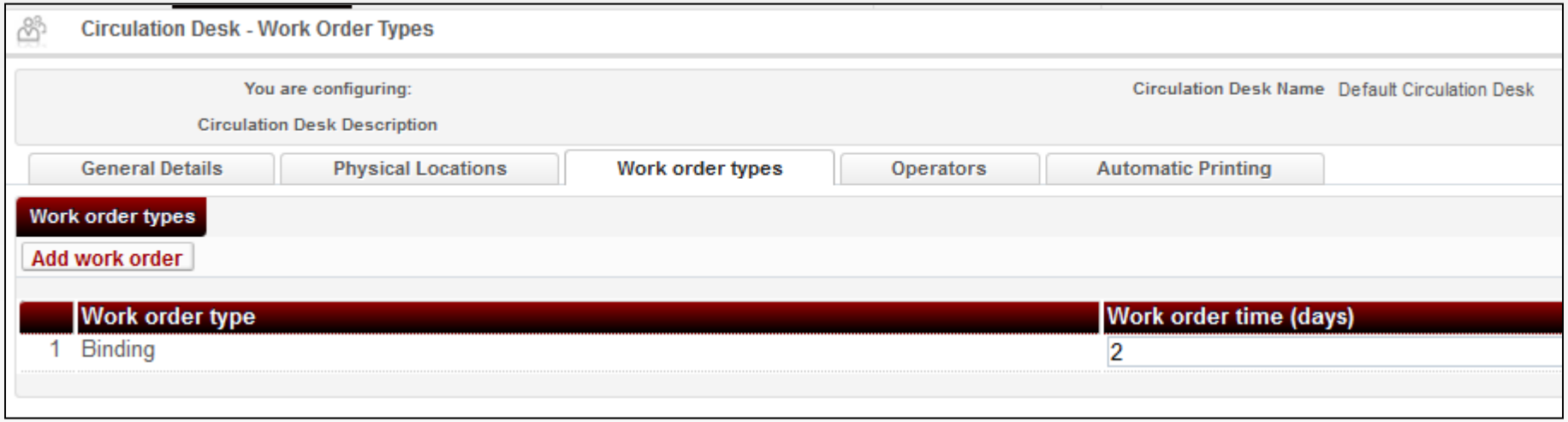
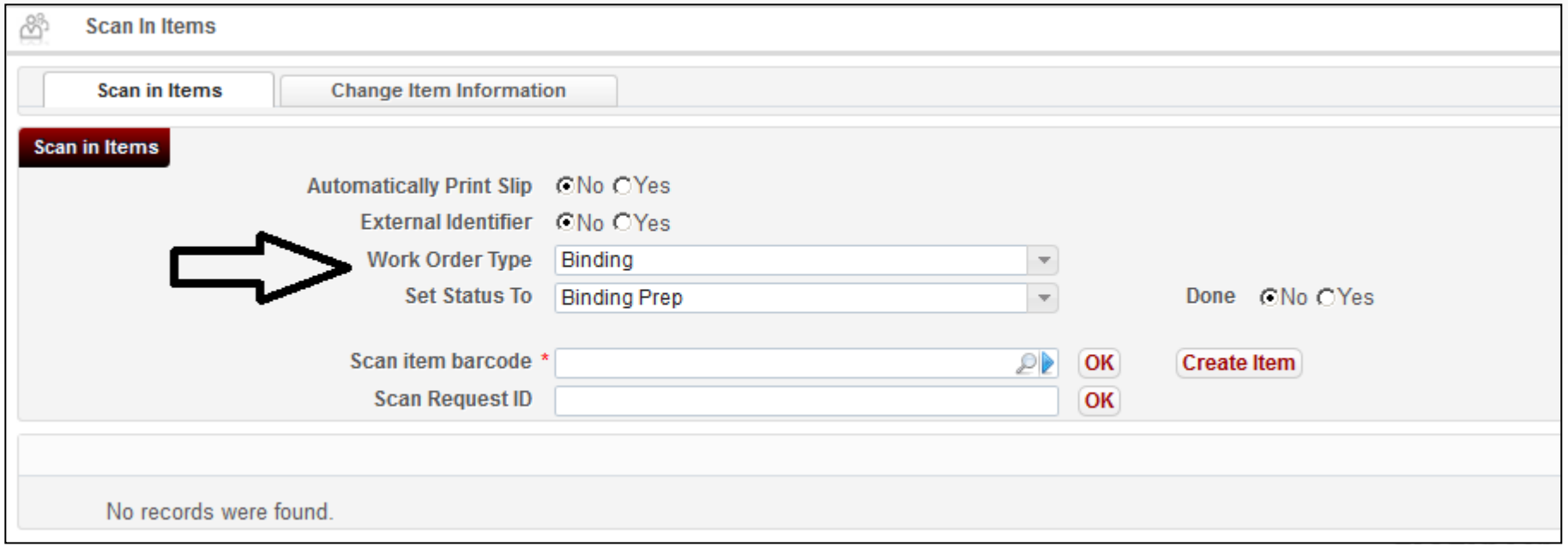
Circulation Desk Attributes





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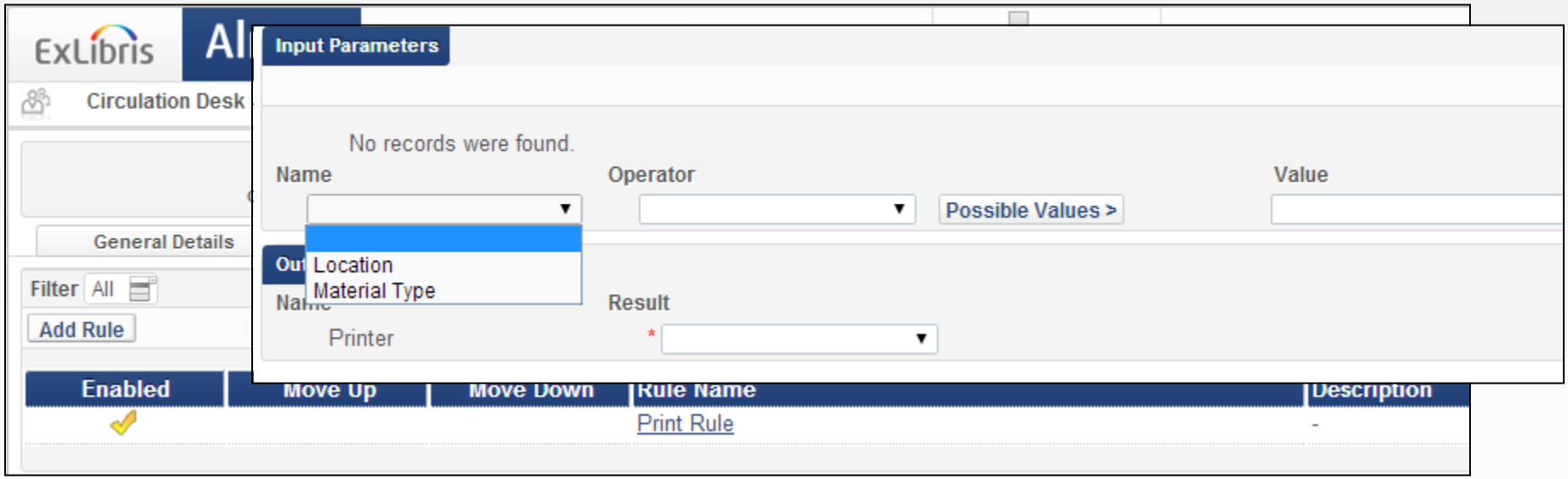
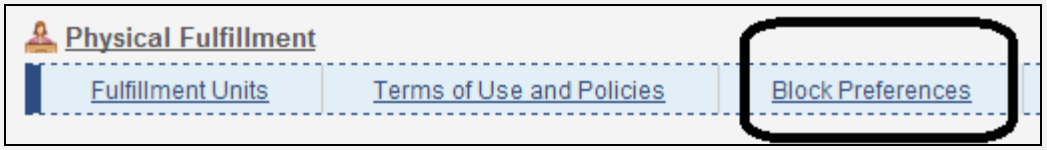
Circulation Desk Attributes



Blocks at Desk



Workbench Preferences

Workbench Preferences List

Tools

Description	Actions	Handlers	Blocks
The loan regular due date conflicts with booking request	Override By All	Shorten the due date to the last possible date	
The renew due date conflicts with booking request	Handle Automatically	Shorten the due date to the last possible date	
Item is not loanable	Override By Operator		
Item is not renewable	Override By Operator		
Item cannot be loaned to patron - insufficient due date	Block		
Item does not belong to this institution	Block		
Item is on Hold Shelf for this patron	Handle Automatically	Delete the request and loan the item	
Item cannot be loaned due to booking request	Block		
Item has not been received by Acquisitions Department	Block		
Item is requested by another patron	Block	Restart the request, since the item is no longer available	
Item renew period exceeded	Override By Operator		
Item cannot be loaned from this circulation desk	Block		
Item cannot be returned at this circulation desk	Block		
The loan cannot be renewed due to the loan status	Block		
Item is on hold shelf for another patron	Block	Restart the request, since the item is no longer available	
Patron cash limits has exceeded	Override By Manager		Both
Patron is expired			
Patron is not active			
Patron loan limit exceeded			

Override By Manager
Override By All
Block
Override By Operator

Both
Loan
Renew

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Display Logic Rules

Hiding Services

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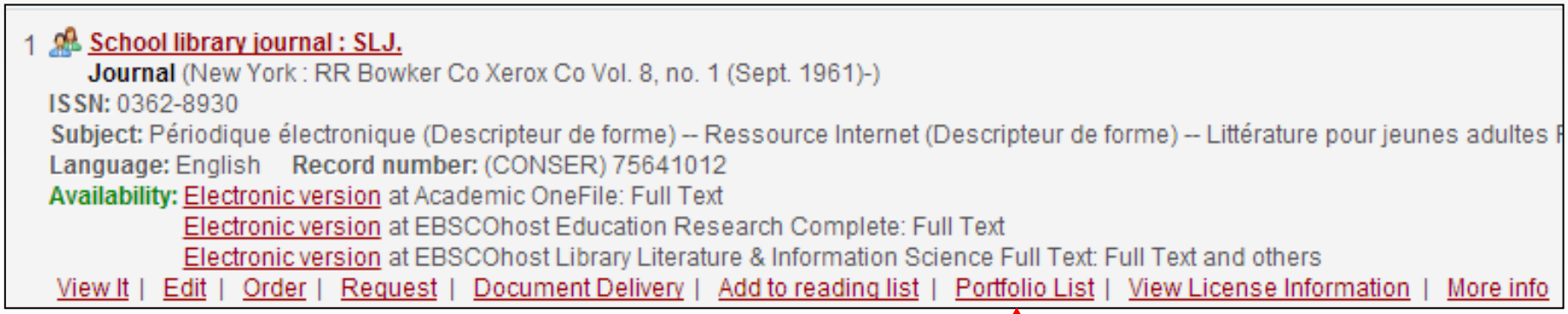
Display Logic Rules - Electronic

- If we do an all titles search for journal “School Library Journal” then we can see via the “Portfolios List” link that there are multiple portfolios



Click here to see full list of Portfolios

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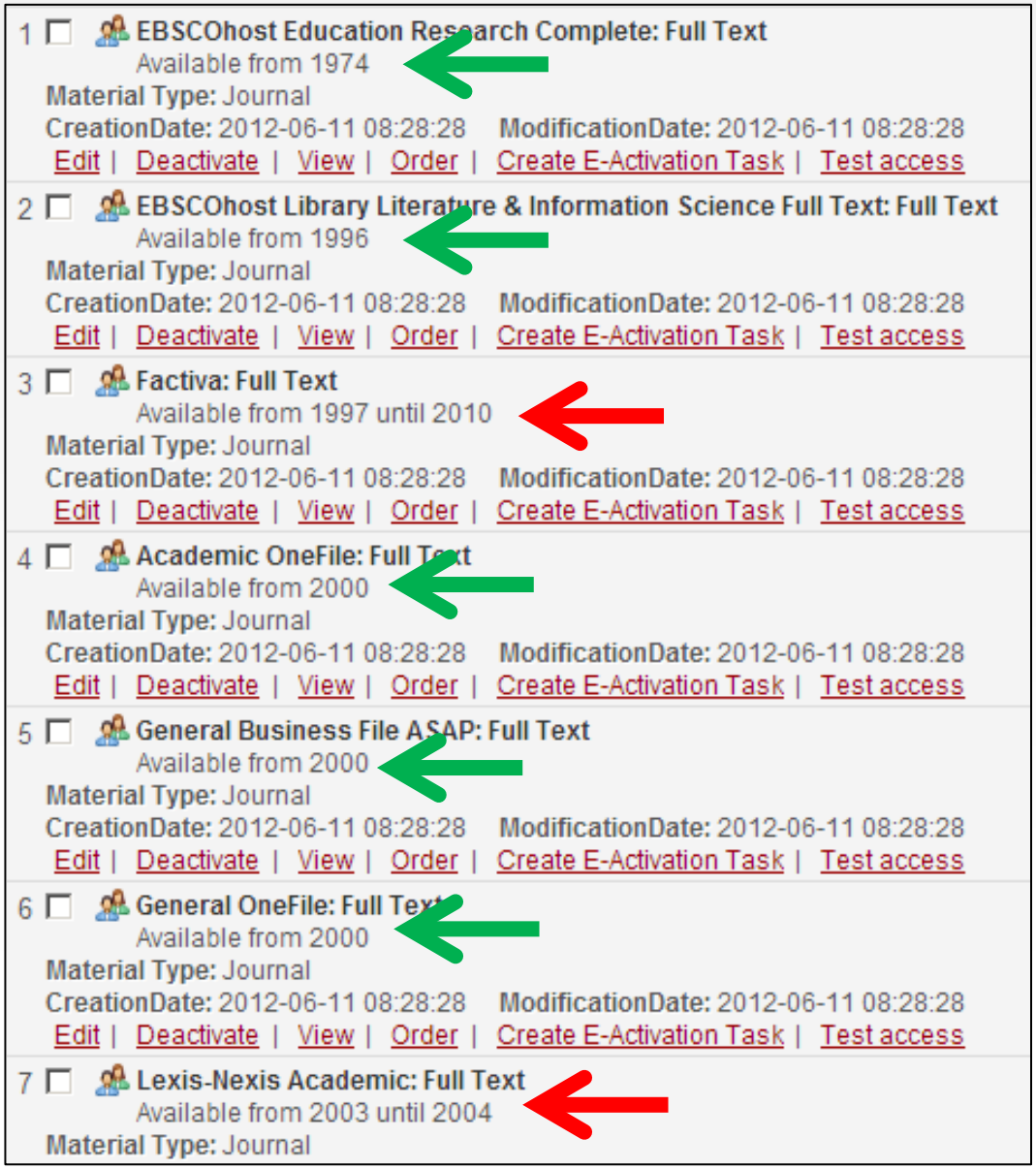
Display Logic Rules - Electronic



- There are a total of 7 portfolios with Full text
- 5 portfolios include coverage of 2013 (green arrows)
- 2 portfolios do not include coverage of 2013 (red arrows) (not included in the “threshold” of the desired year)

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Display Logic Rules - Electronic

- The 5 portfolios which do include Full Text coverage of 2013 are:

1. EBSCOhost Education Research Complete
2. EBSCOhost Library Literature & Information Science Full Text
3. Academic OneFile
4. General Business File ASAP
5. General OneFile

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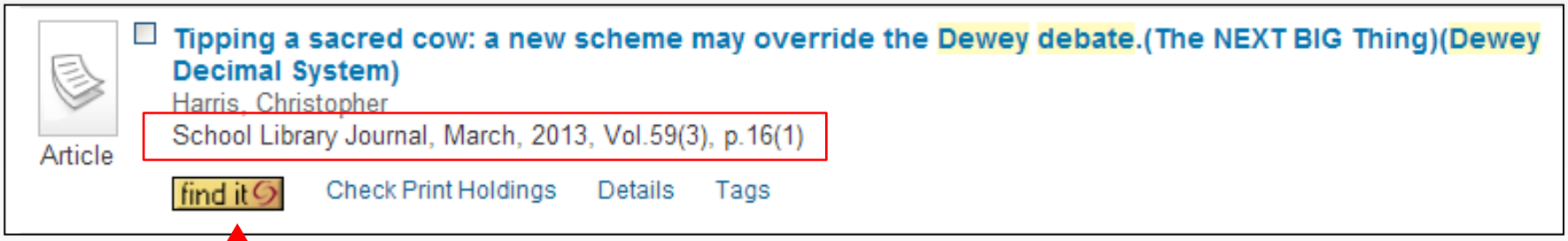
Display Logic Rules - Electronic

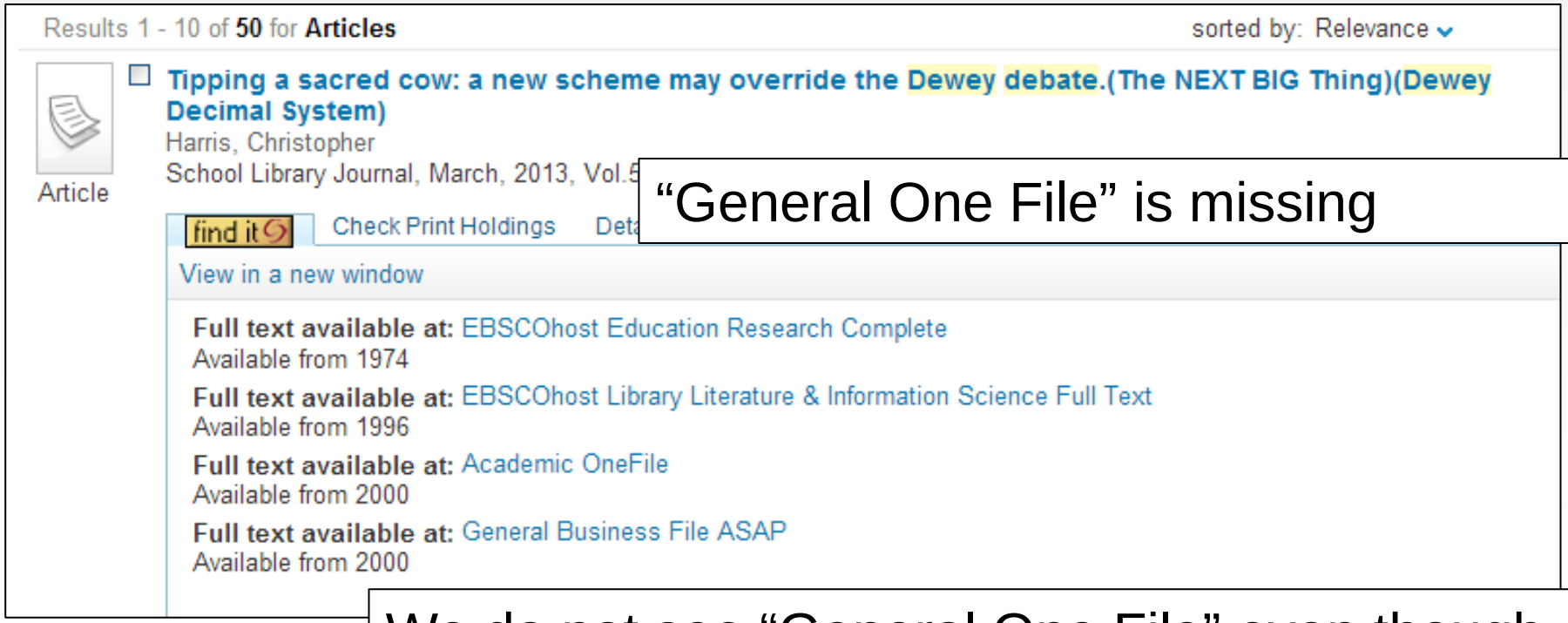
- Now via Primo, as end user, we will search for an article which is in journal “School Library Journal” in an issue from 2013



Clicking the View It tab (here customized as “find it”) will show us the links to portfolios with this article available in full text

Display Logic Rules - Electronic

- As previously shown there are 5 portfolios with “School Library Journal” Full Text for 2013. But here we see only 4 portfolio's



“General One File” is missing

We do not see “General One File” even though it has “School Library Journal” Full text available for 2013

Display Logic Rules - Electronic

- In order to see why ‘General One File” does not appear we will access the “Discovery Interface Display Logic” section of the Fulfillment Configuration menu and then click the “Display Logic Rules” link

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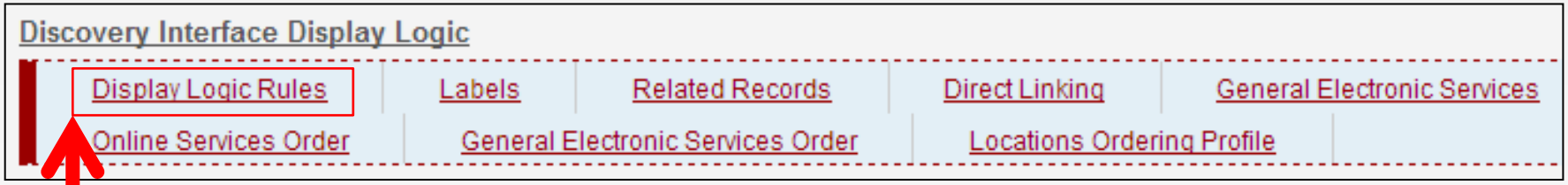
Display Logic Rules - Electronic



Access the display logic rules

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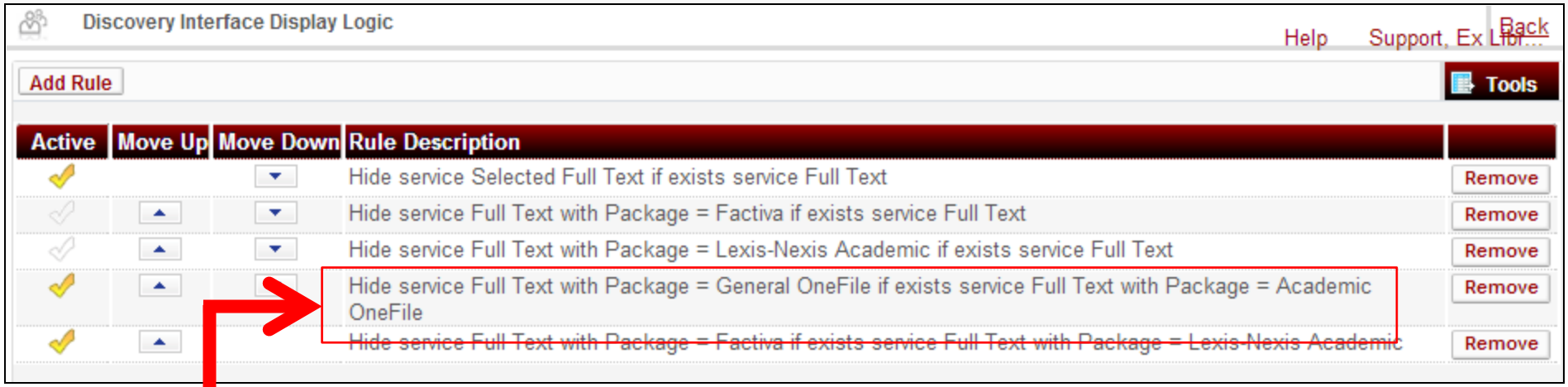
Display Logic Rules - Electronic

- Here we see a rule which states “Hide service Full Text with Package = General OneFile if exists service Full Text with Package = Academic OneFile”
- This is why we do not see General OneFile



Rule to hide General OneFile

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Display Logic Rules - Electronic

- We could also make a rule, for example, to state “If EBSCOhost Education Research Complete” exists for full text then do not show “EBSCOhost Library Literature & Information Science”

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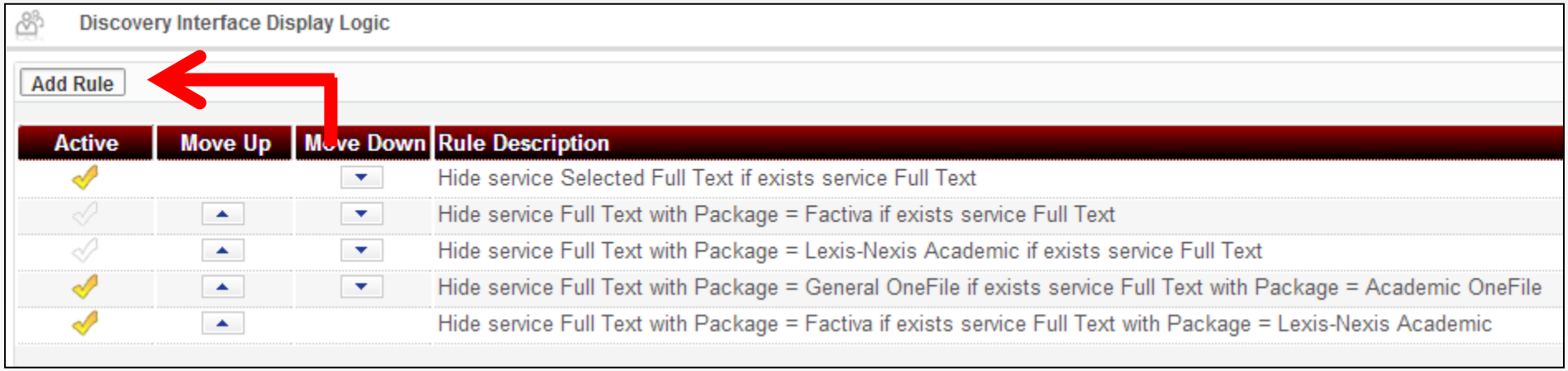
Display Logic Rules - Electronic

- First we will click “Add Rule”



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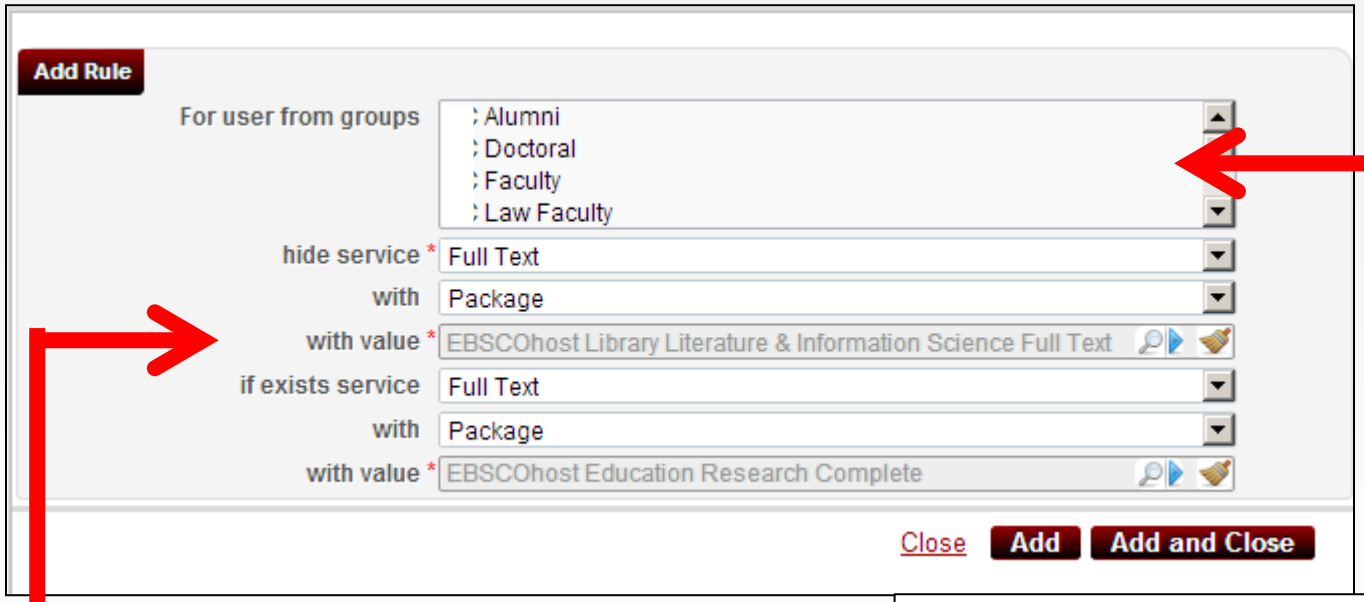
Display Logic Rules - Electronic

- Then we make the conditions



Service to hide and condition

Use groups are relevant only for rules regarding physical inventory

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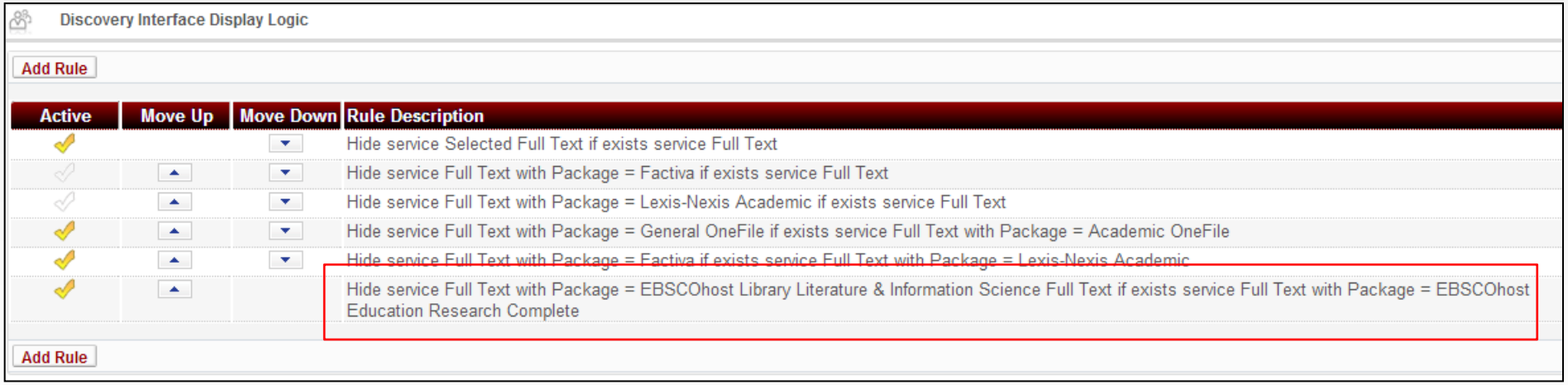
Display Logic Rules - Electronic

- The condition has been added



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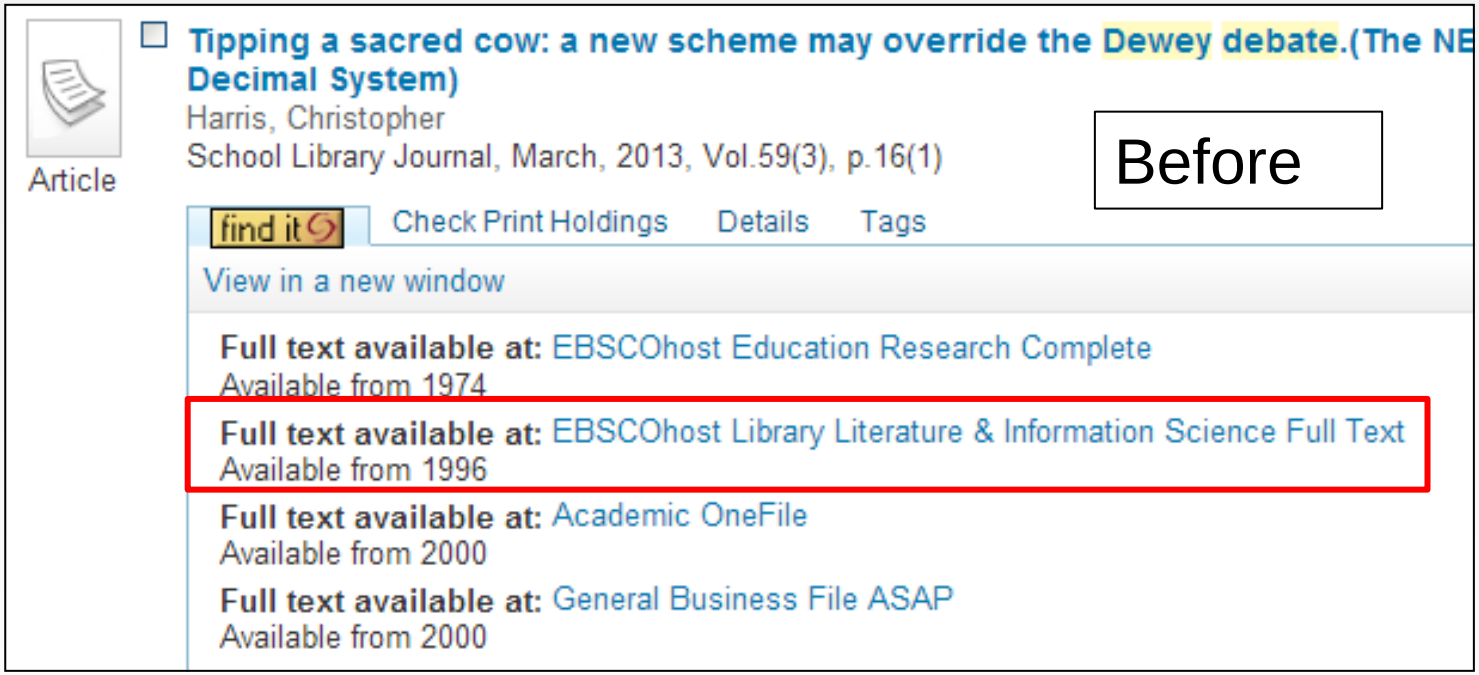
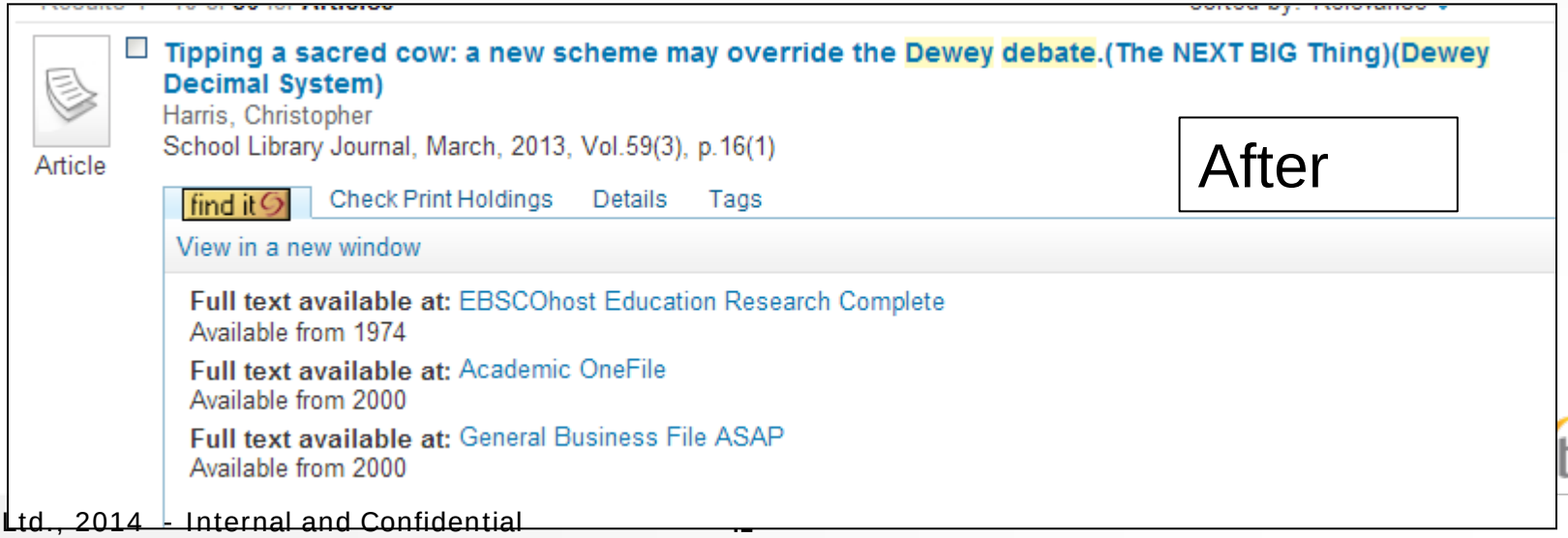
Display Logic Rules - Electronic





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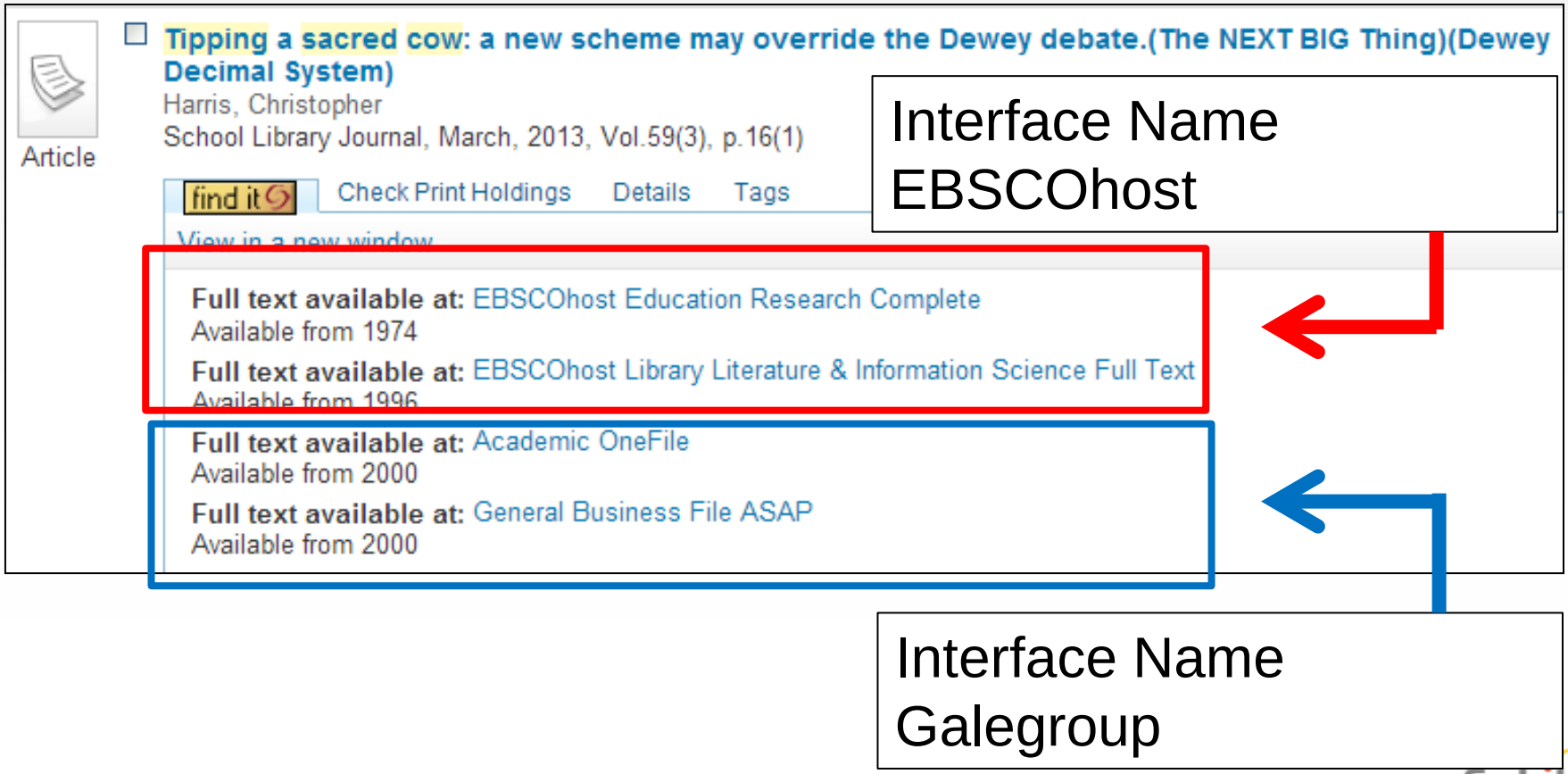
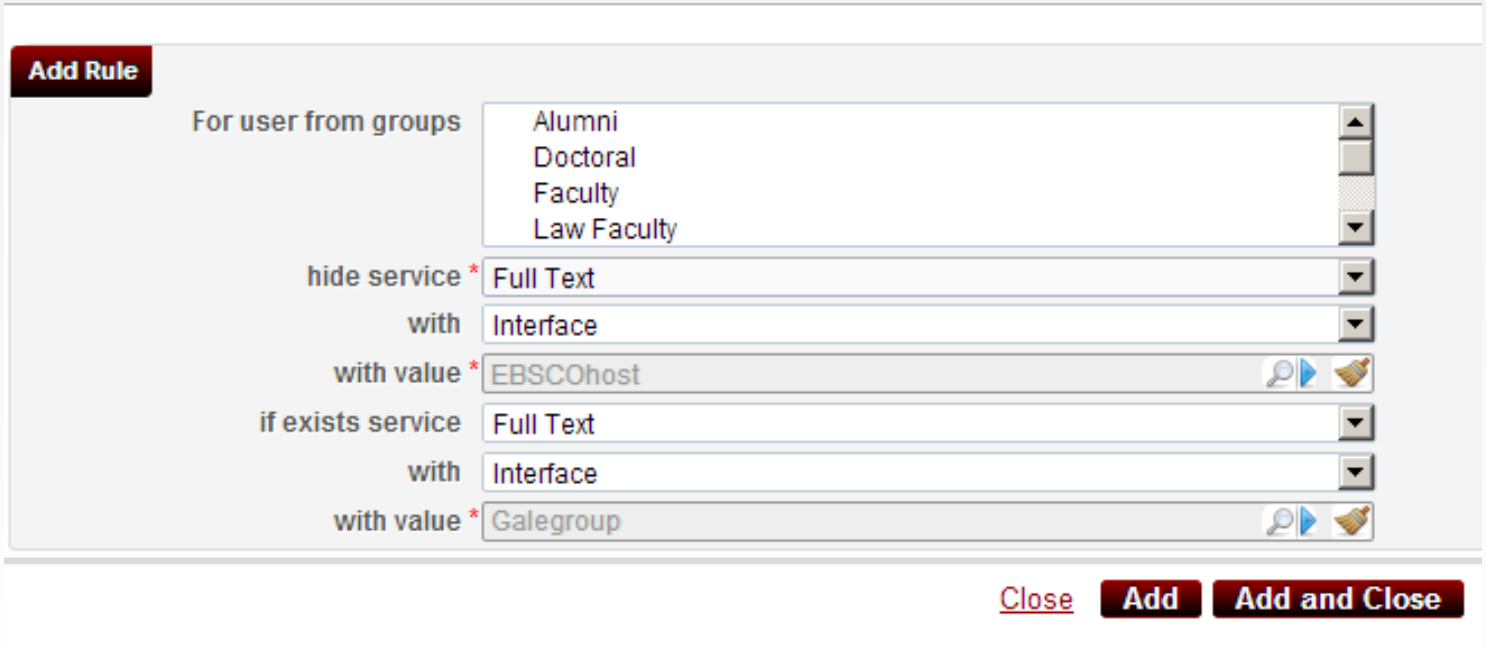
Display Logic Rules - Electronic

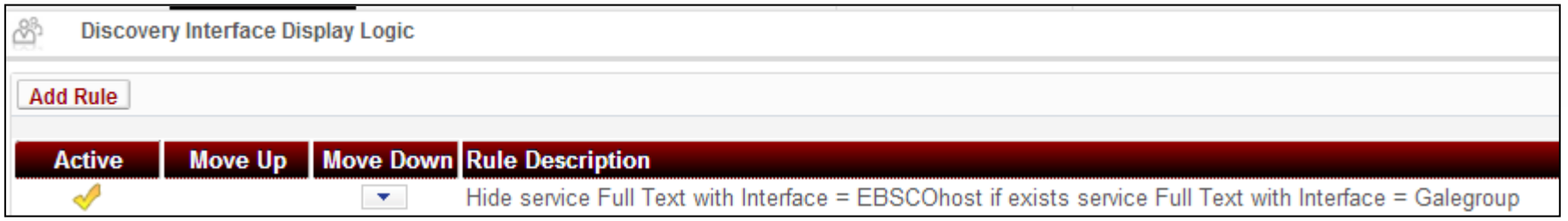
- It is also possible to create a rule that hides service for the complete interface and not just the package



Display Logic Rules - Electronic

- Here we say: Hide Interface EBSCOhost if exists Interface Galegroup





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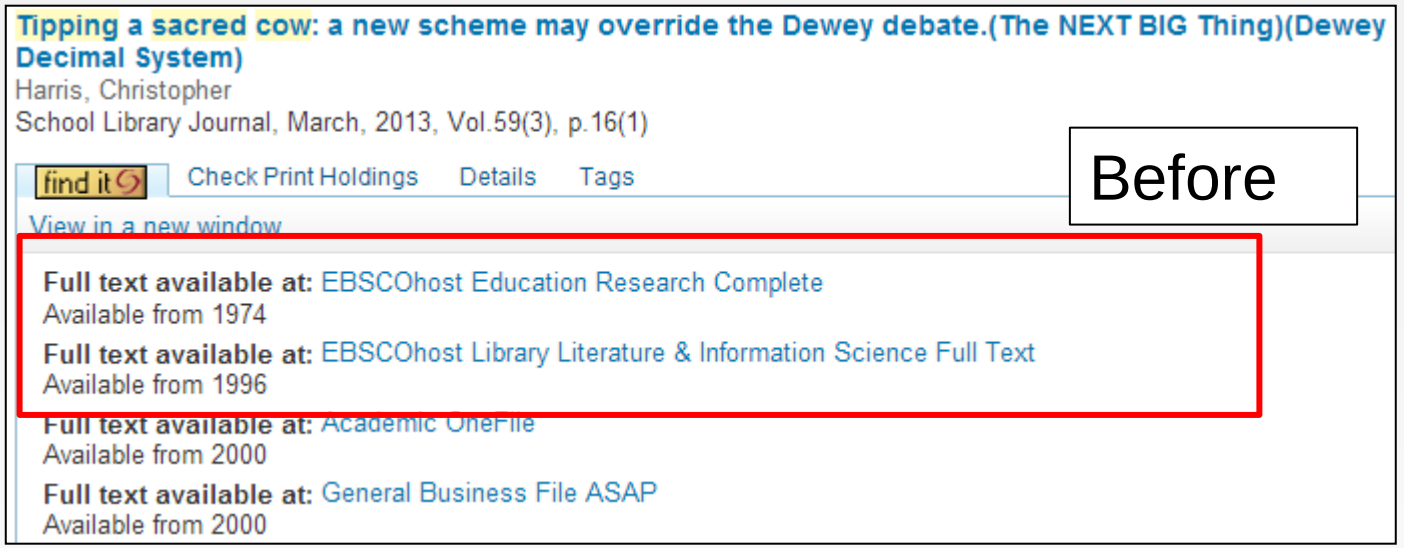
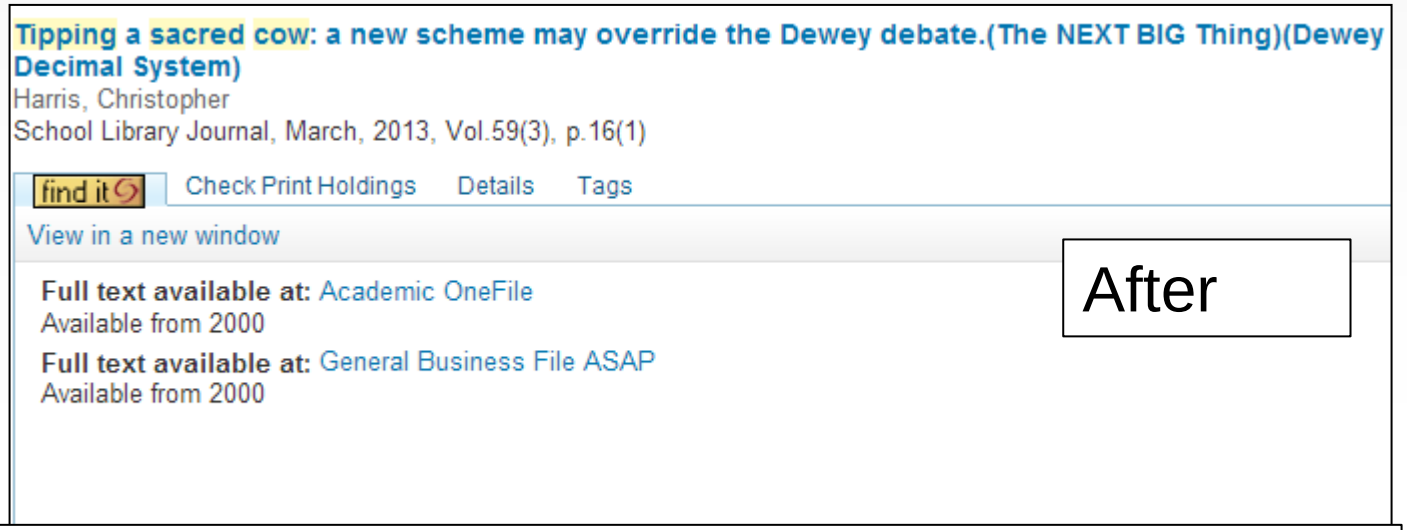
Display Logic Rules - Electronic





Links for Interface EBSCOhost have disappeared

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Display Logic Rules

Tracing Display Logic Rules Actions

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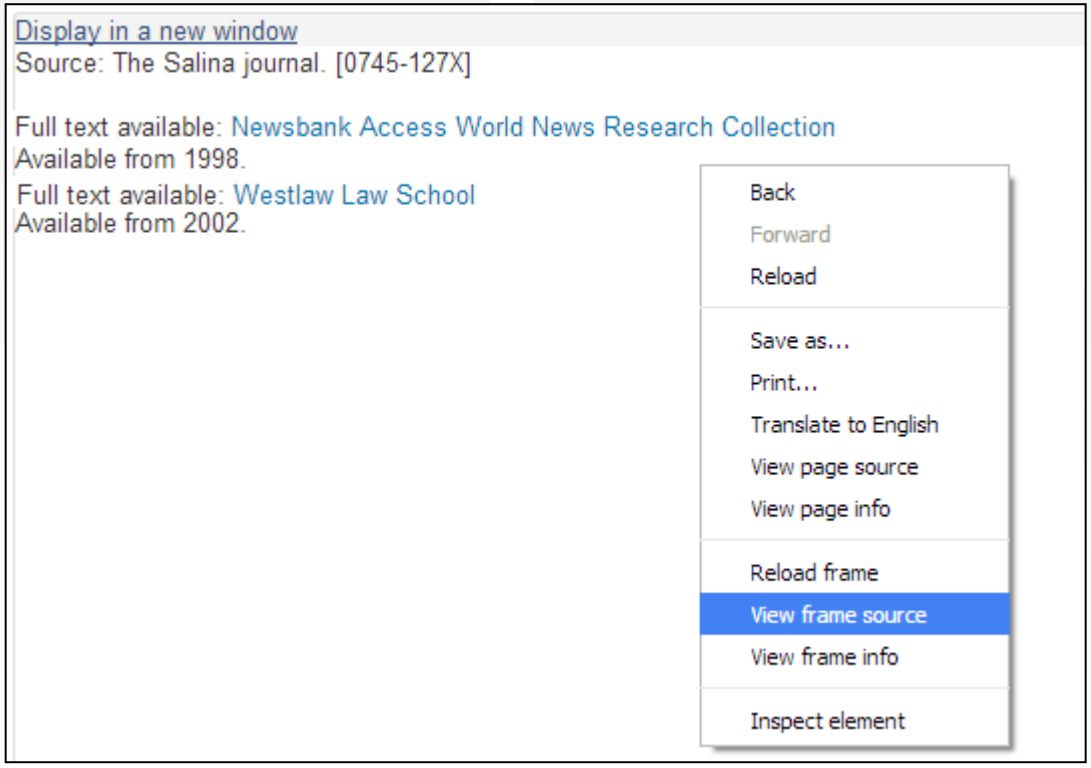
Display Logic Rules - Tracing

- Display Logic Rules may become pretty crowded. How can I trace if and how my rules are working?



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Display Logic Rules - Tracing

```
<html xmlns="http://www.w3.org/1999/xhtml">
<!-- DEBUG:
<li>http://na01.alma.exlibrisgroup.com/view/uresolver/TR_INTEGRATION_INST/openurl?
svc_dat=CTO&debug=true&debug=true&&u.ignore_date_coverage=true&rft.mms_id=9933471100561&rfr_id=info:sid/primo.ex

END DEBUG-->
 <head>
        <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
        <title>Home</title>

        <link href="/view/skins/default/css/otb_mashup.css" rel="stylesheet" type="text/css" />
        <link href="/view/branding_skin/css/mashup.css" rel="stylesheet" type="text/css" />

        <script type="text/javascript" src="/view/javascript/jquery.js"></script>
        <script language="javascript" type="text/javascript" src="/view/javascript/uresolverScripts.js"></script
</head>
 <body>
<form name="uResolverViewItForm" method="post" action="/view/action/uresolverViewit.do"><div class="tabContent v
        <img style="display:none" alt="Invisible image"src="https://beacon01.alma.exlibrisgroup.com/boom/apache_
A=Alma&amp;I=561&amp;S=562856046FAD935252F1D6866F6137B8.app01.prod.alma.dc04.hosted.exlibrisgroup.com:1801&amp;S
;T=&amp;TYP=&amp;O1=0&amp;IGNORE=1402832270104" /><c>Source: The Salina journal. [0745-127X]</c>
                                <br/>
                                <br/>
                <!-- if no electronic & no digital available - show this -->
        <ul>
                                <li>
                                <a href="/view/action/uresolver.do?operation=resolveService&package_service_id=1
class="EXLViewOnlineLinksIconPopout"></span></a>
                                <span class="internalTitle">
                                        Full text available:</span>
```


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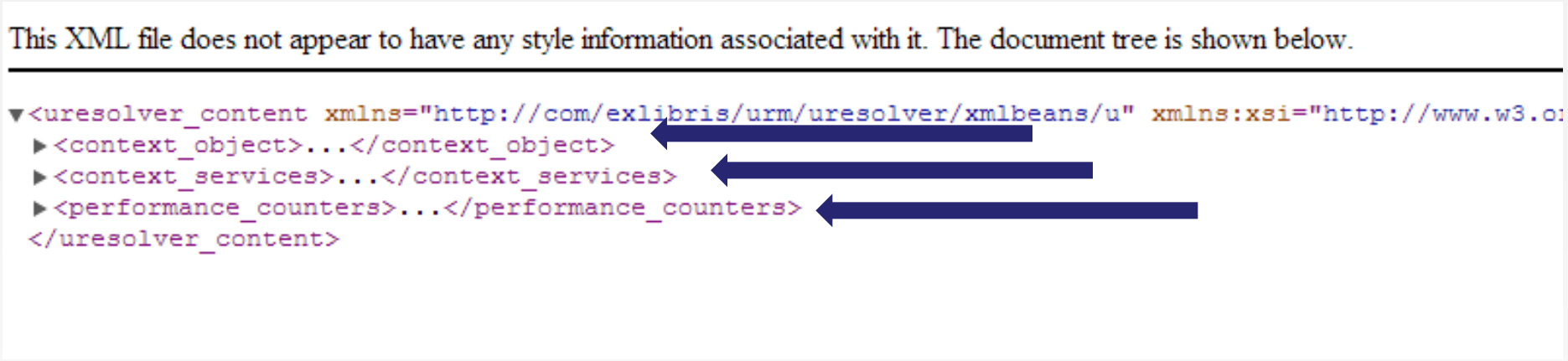
Display Logic Rules - Tracing



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Display Logic Rules - Tracing

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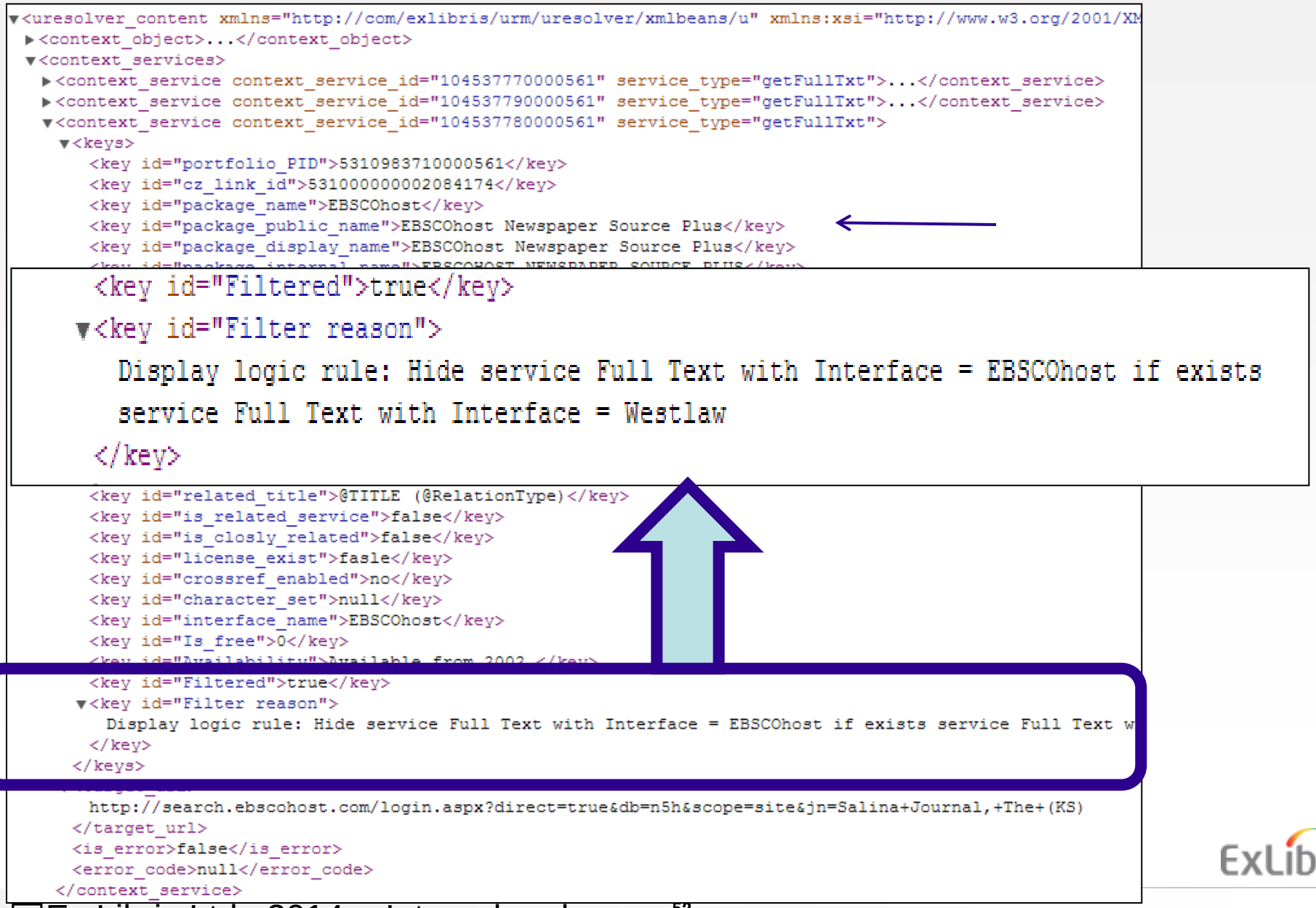
Display Logic Rules - Tracing

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
▼<uresolver_content xmlns="http://com/exlibris/urm/uresolver/xmlbeans/u" xmlns:xsi="http://www.w3.org/2001/XM
  ▶<context_object>...</context_object>
  ▼<context_services>
    ▶<context_service context_service_id="104537770000561" service_type="getFullTxt">...</context_service>
    ▶<context_service context_service_id="104537790000561" service_type="getFullTxt">...</context_service>
    ▶<context_service context_service_id="104537780000561" service_type="getFullTxt">...</context_service>
   </context_services>
  ▶<performance_counters>...</performance_counters>
  </uresolver_content>
```

Display Logic Rules - Tracing



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Display Logic Rules

Physical Services

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Display Logic Rules - Physical

Example One

- Resource Sharing requests for a record with item owned by library and has an option for request

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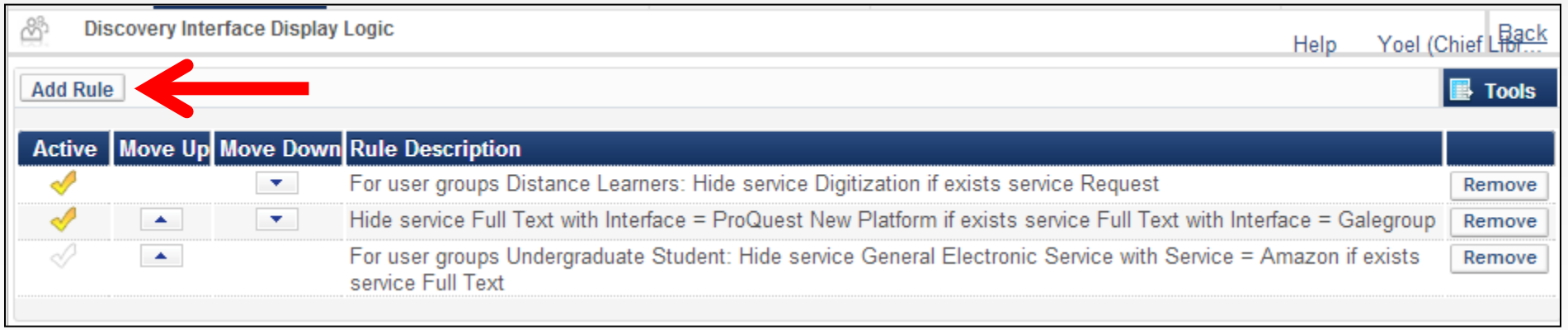
Display Logic Rules - Physical

- To prevent this we can add a display logic rule ...



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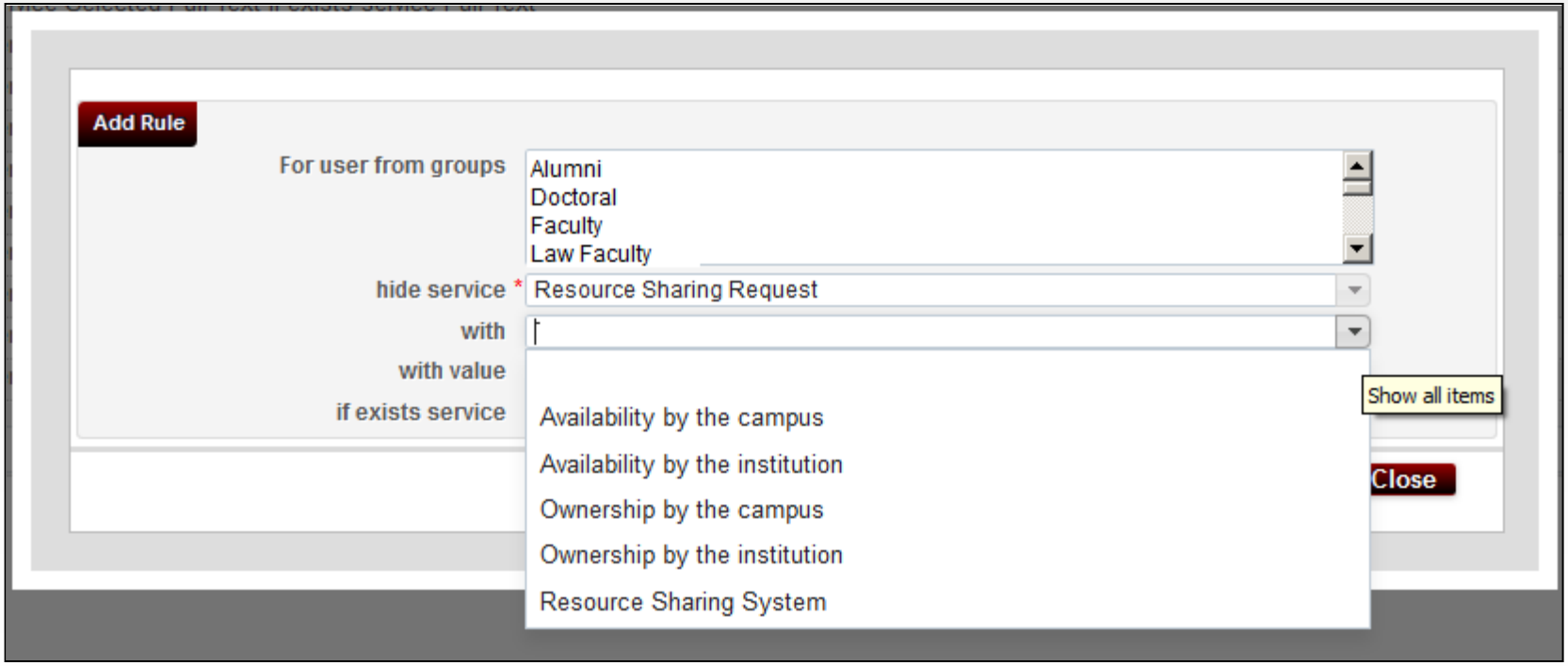
Display Logic Rules - Physical

- Which would look like this:



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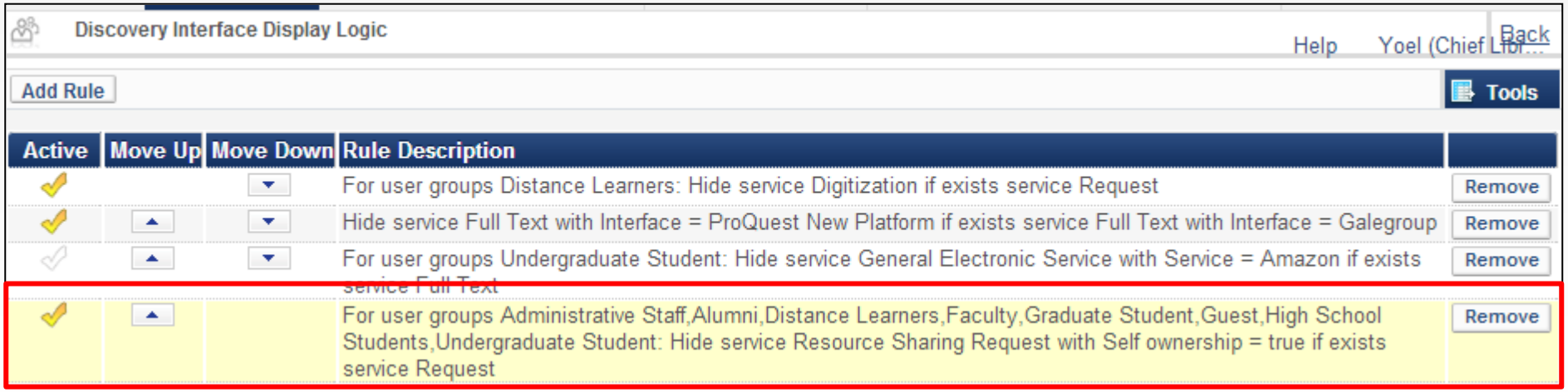
Display Logic Rules - Physical

- So now we have stated: For all user groups hide the resource sharing request if the library owns a requestable copy



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Display Logic Rules - Physical

- And now the resource sharing request links no longer exist

Previously resource sharing requests were here

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Display Logic Rules - Physical

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Labels

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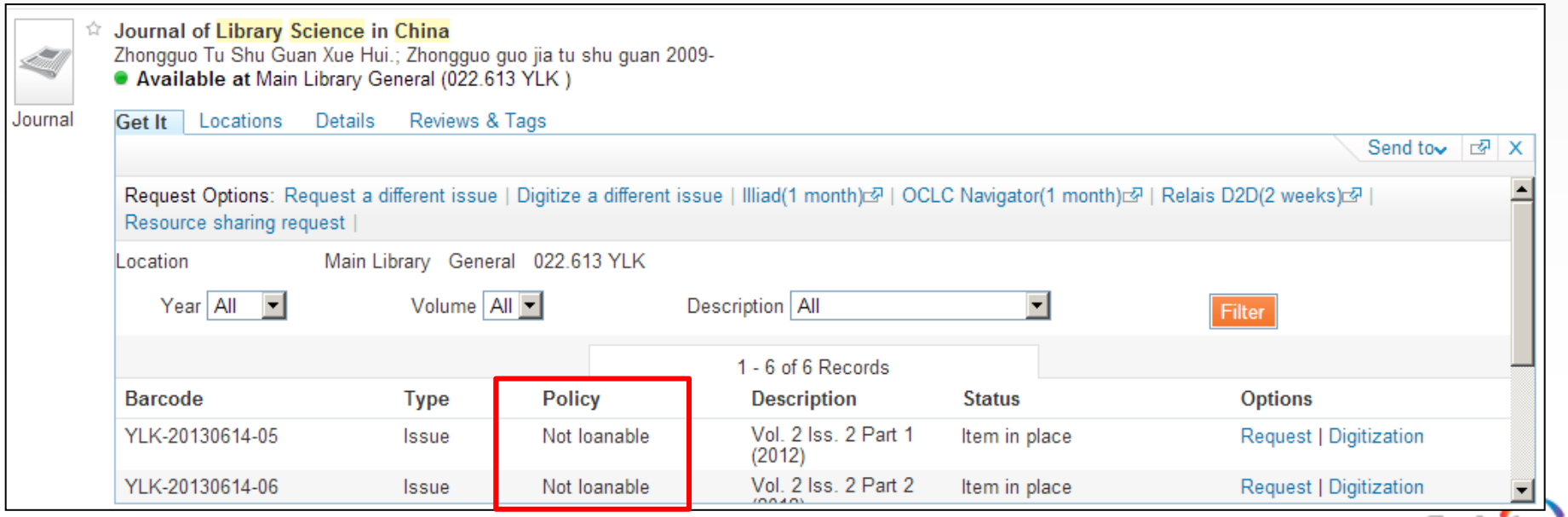
Labels

Example One

- It is also possible to change the labels which appear in the GetIt and ViewIt tab
- Below an item which may not be loaned appears as “Not loanable” and the library may want to change it to “For use in library”



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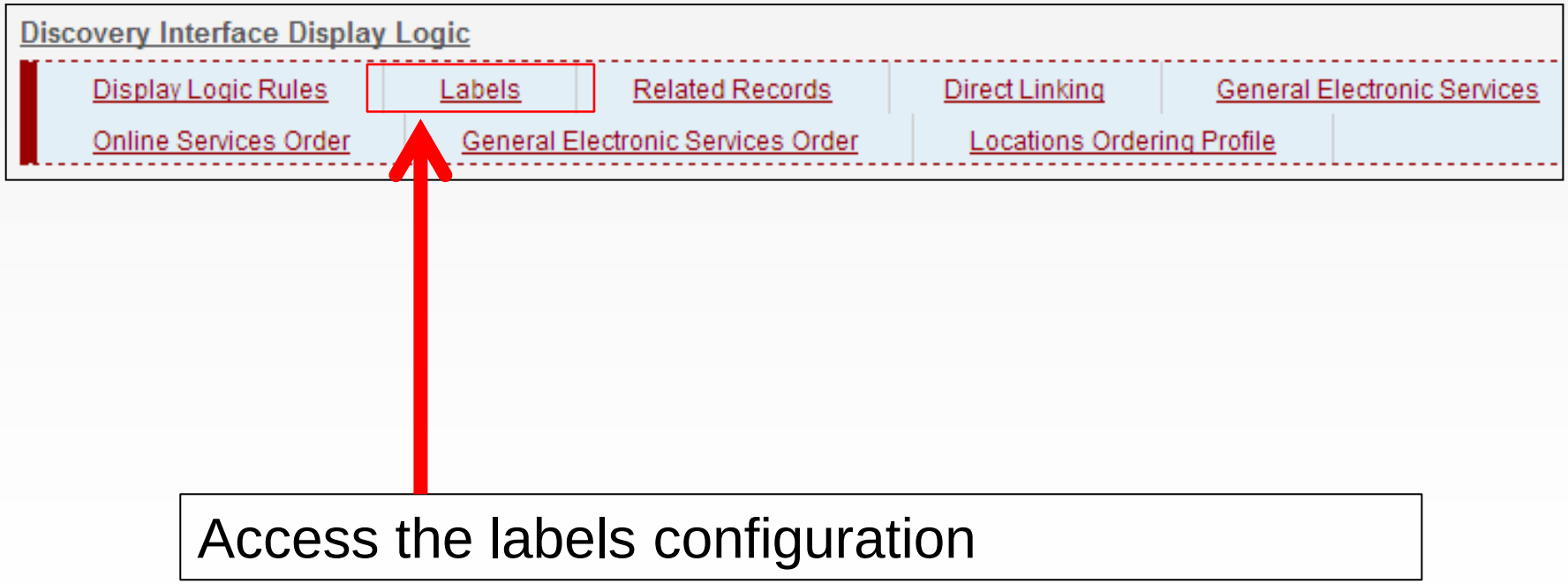
Labels

- The Labels configuration may be accessed from the Display Interface Display Logic section of the fulfillment configuration menu



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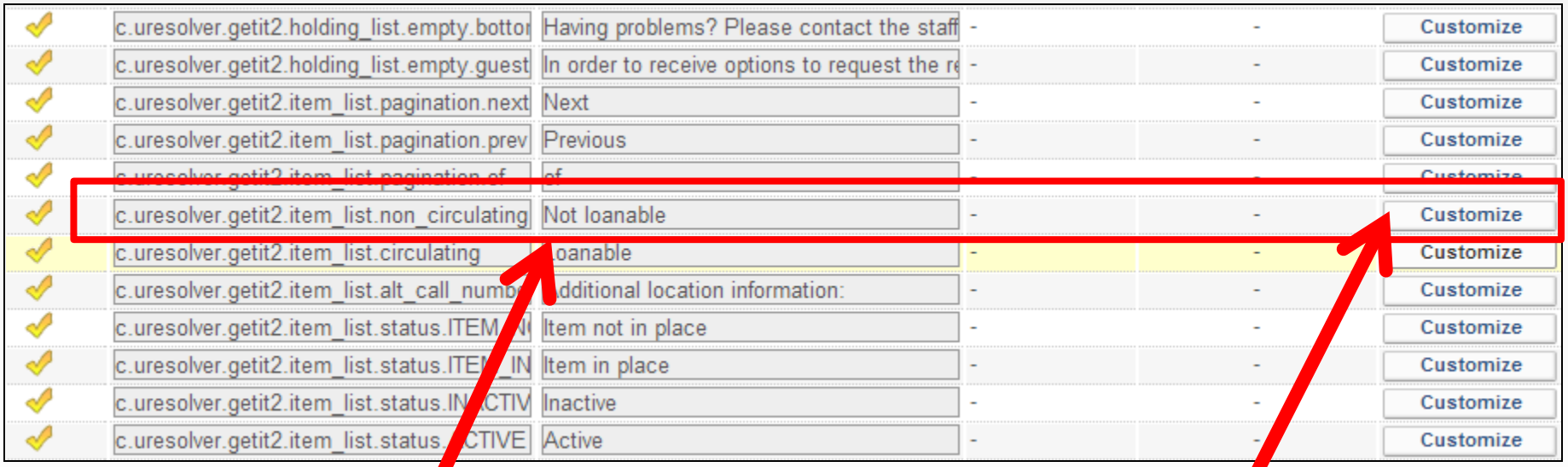
Labels

- After clicking “labels” we can see the list of labels which display in Primo



This is the text we want to change

Find label which you want to change and click “Customize”

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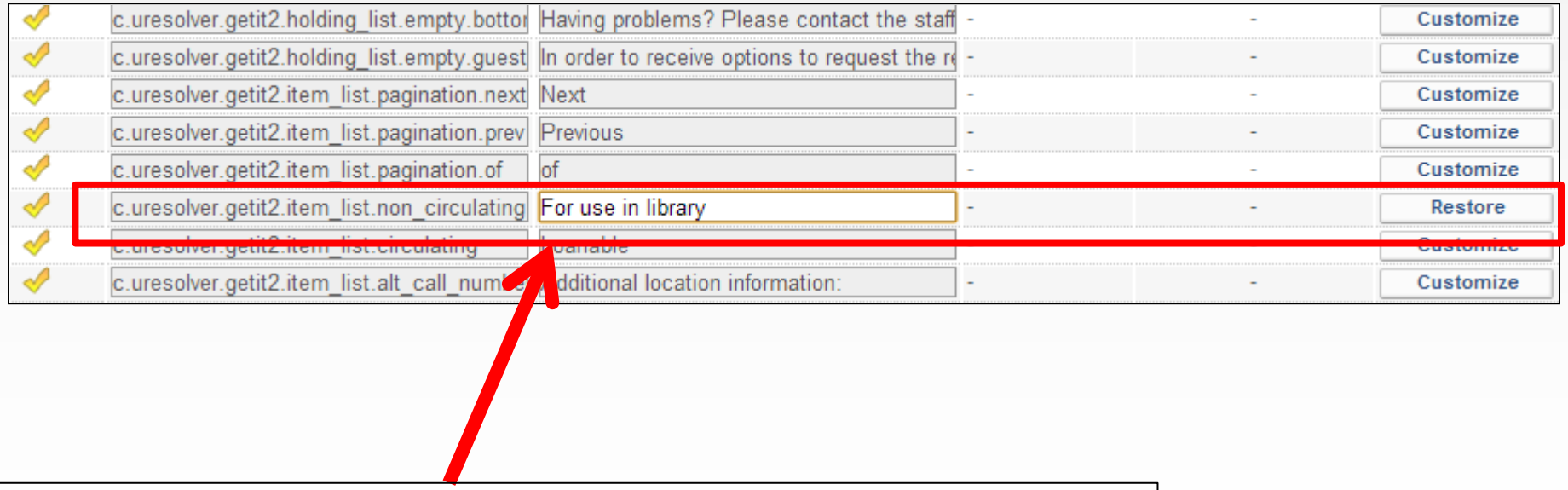
Labels

- Enter the new value and save



Now it will state “For use in library” instead of “Not Loanable”

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Labels

- The change has taken effect

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Labels

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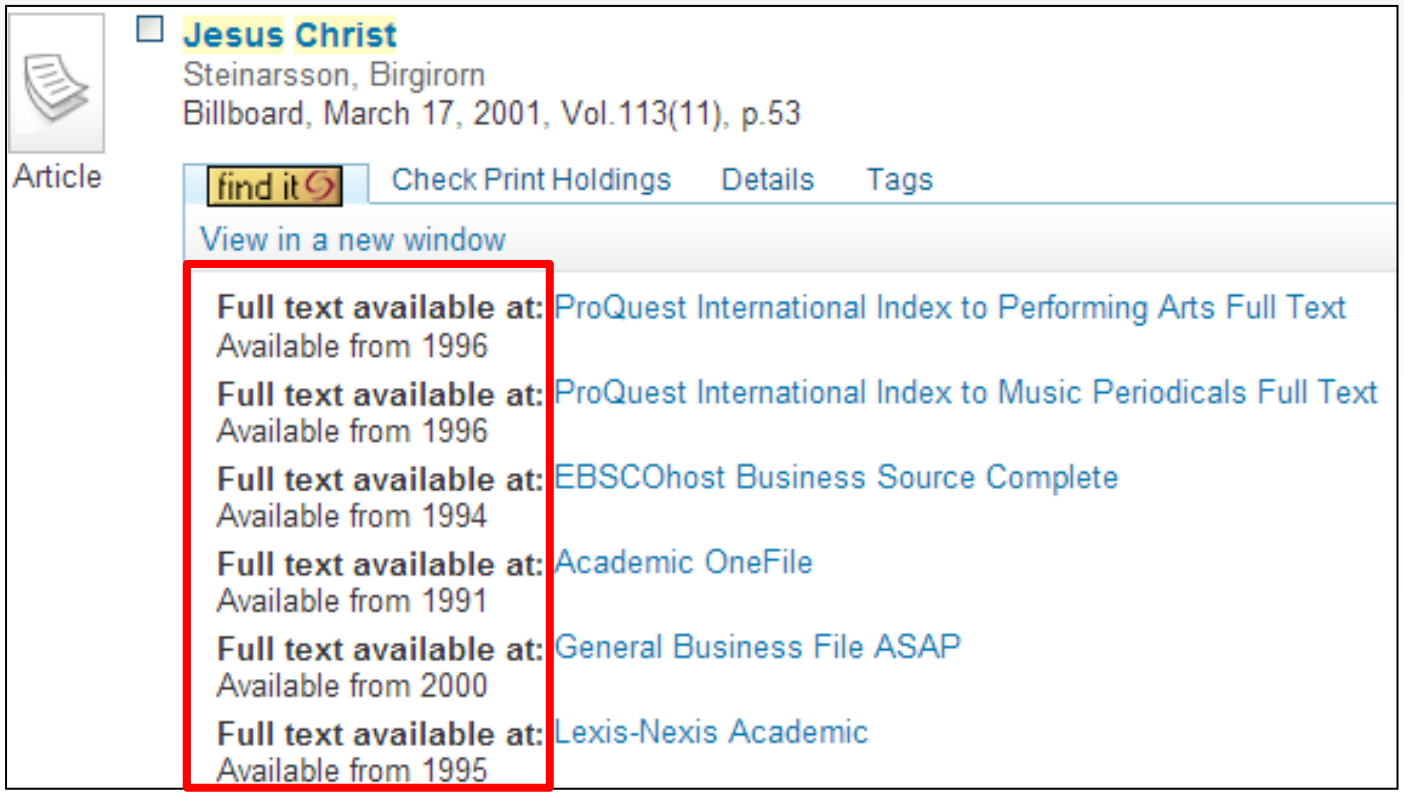
Labels

Example Two

- The text of the ViewIt tab may also be changed
- For example we will change here “Full text Available at” to “Link for full text”



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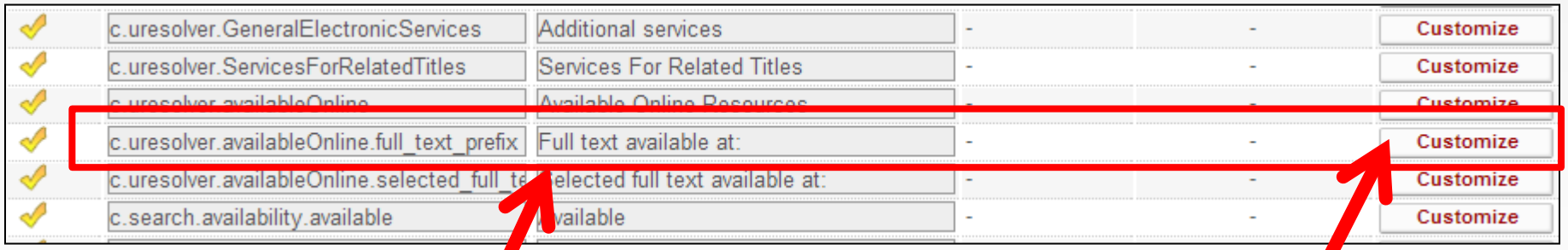
Labels

- After clicking “labels” we can see the list of labels which display in Primo

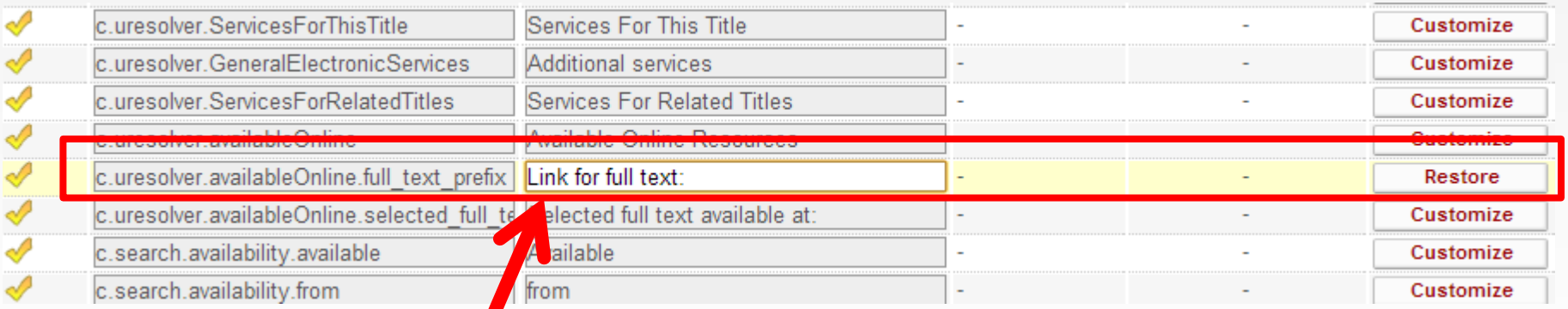


This is the text we want to change

Find label which you want to change and click “Customize”

Labels

- Enter the new value and save



Now it will state “Link for full text” instead of “Full text available at”

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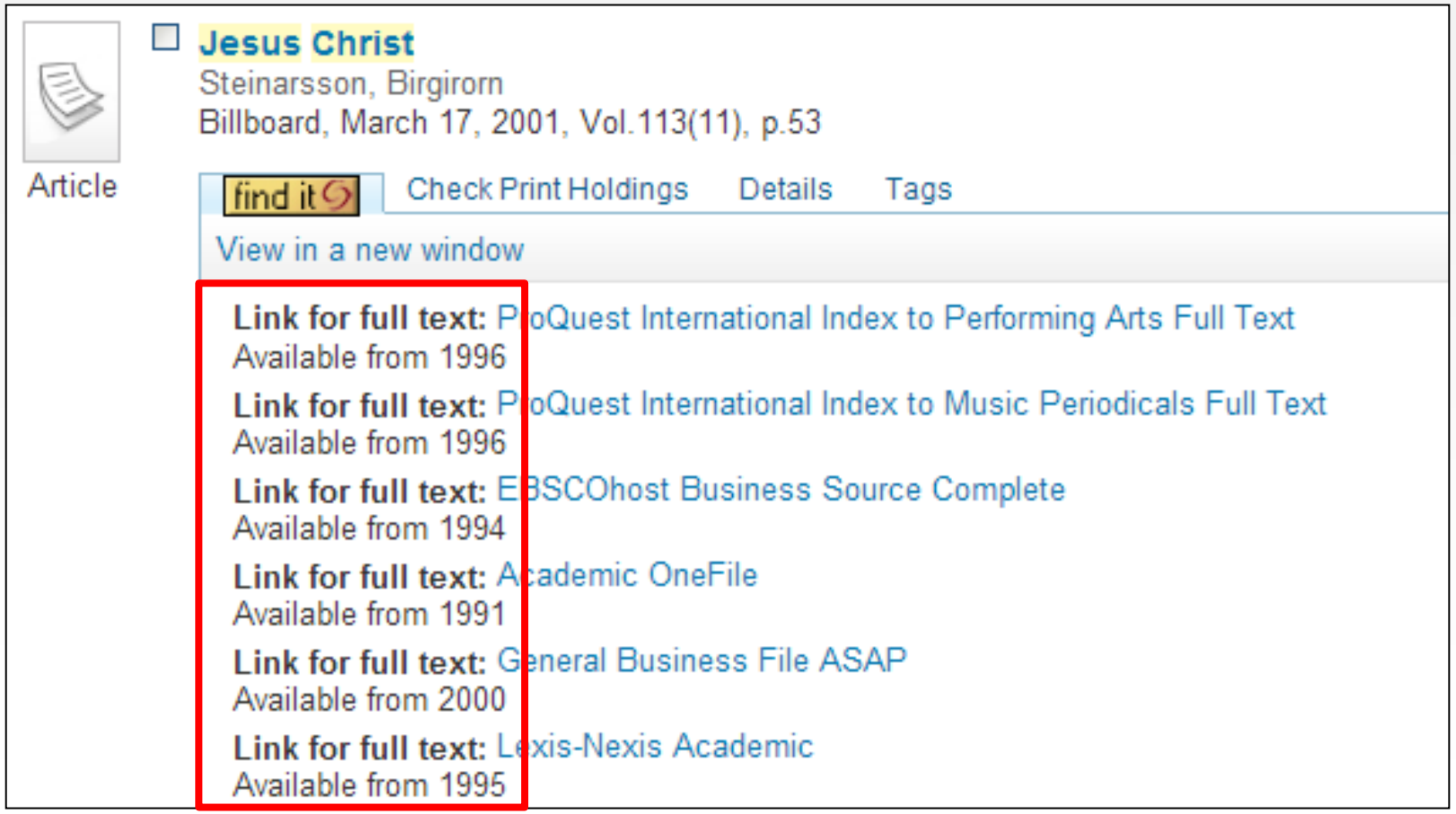
Labels

- See the change



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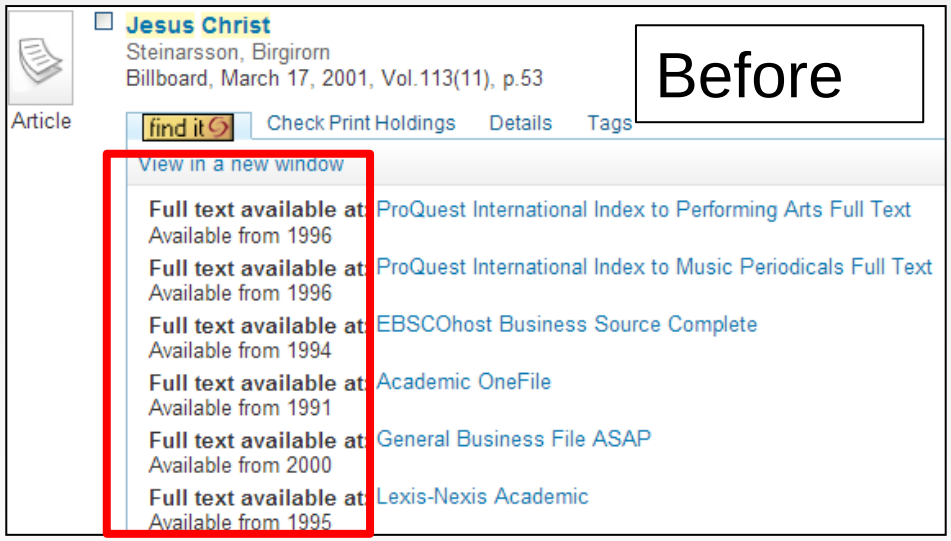
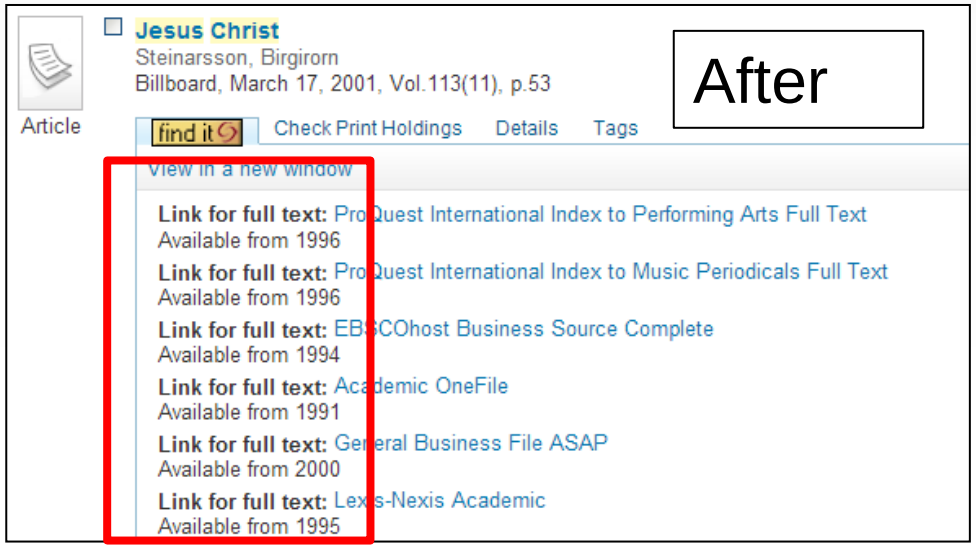
Labels





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Direct Linking

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Direct Linking

- The Direct Linking configuration may be accessed from the Display Interface Display Logic section of the fulfillment configuration menu

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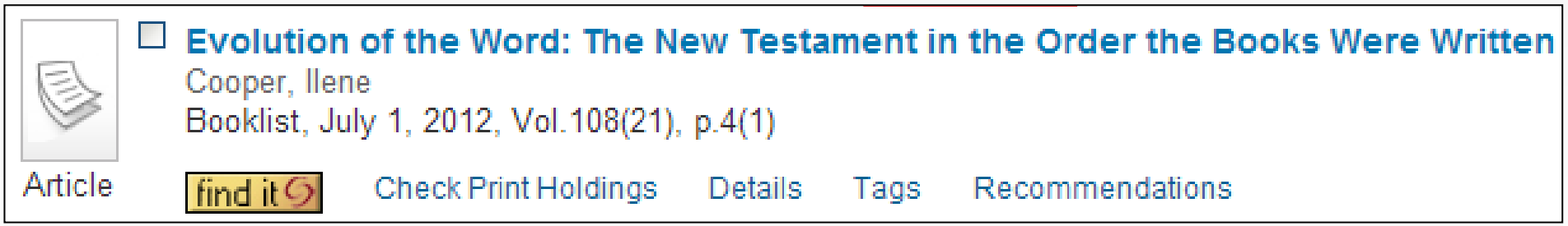
Direct Linking

- Here is the article “Evolution of the Word: The New Testament in the Order the Books Were Written” which is in Booklist, July 1, 2012, Vol.108(21), p.4(1)



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Direct Linking

- The ViewIt tab shows that there are three portfolios with the resource
- This user must click on one of them
- But … the library may decide that instead of working this way the first link will open directly

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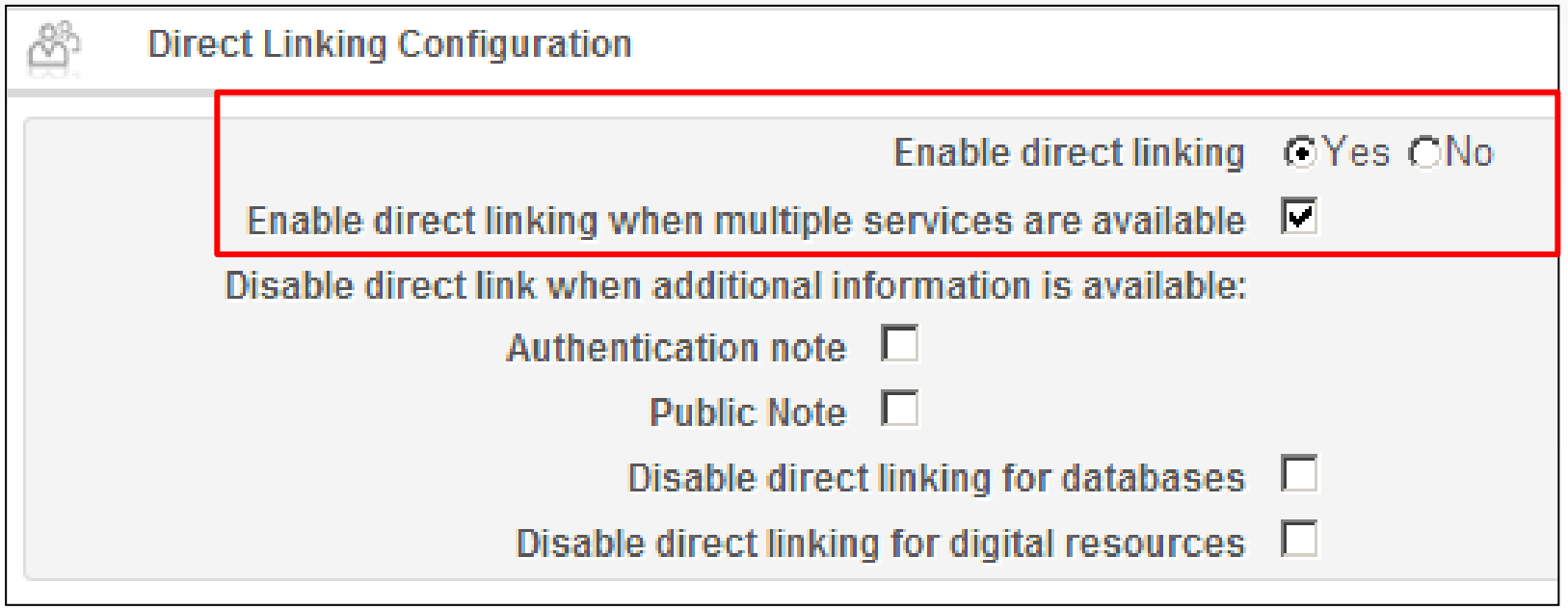
Direct Linking

- In such a case we would define “enable direct linking” and also state “Enable direct linking when multiple services are available”
- On our case three services were available, and direct linking will be enabled



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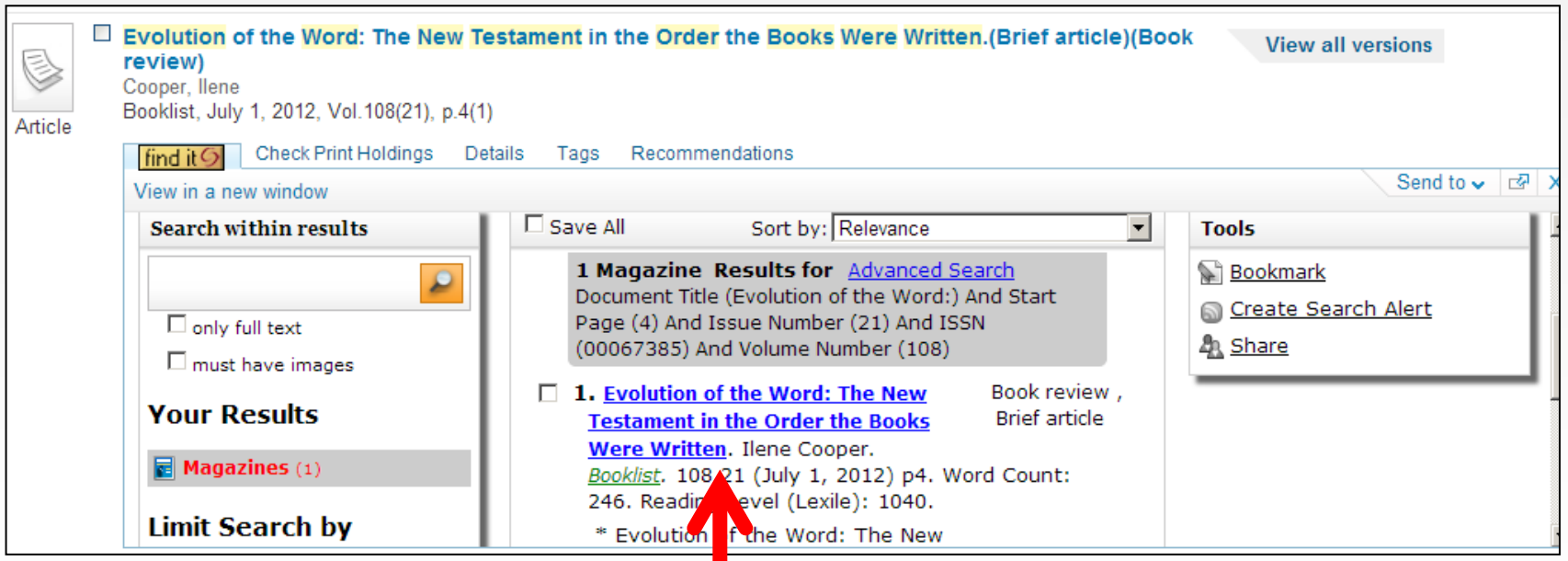
Direct Linking

- Now as soon as the “ViewIt” tab is activated the resource opens in the ViewIt window



Instead of getting list of portfolios here which contain the journal with the article – the link to one of them opens directly

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Services Order

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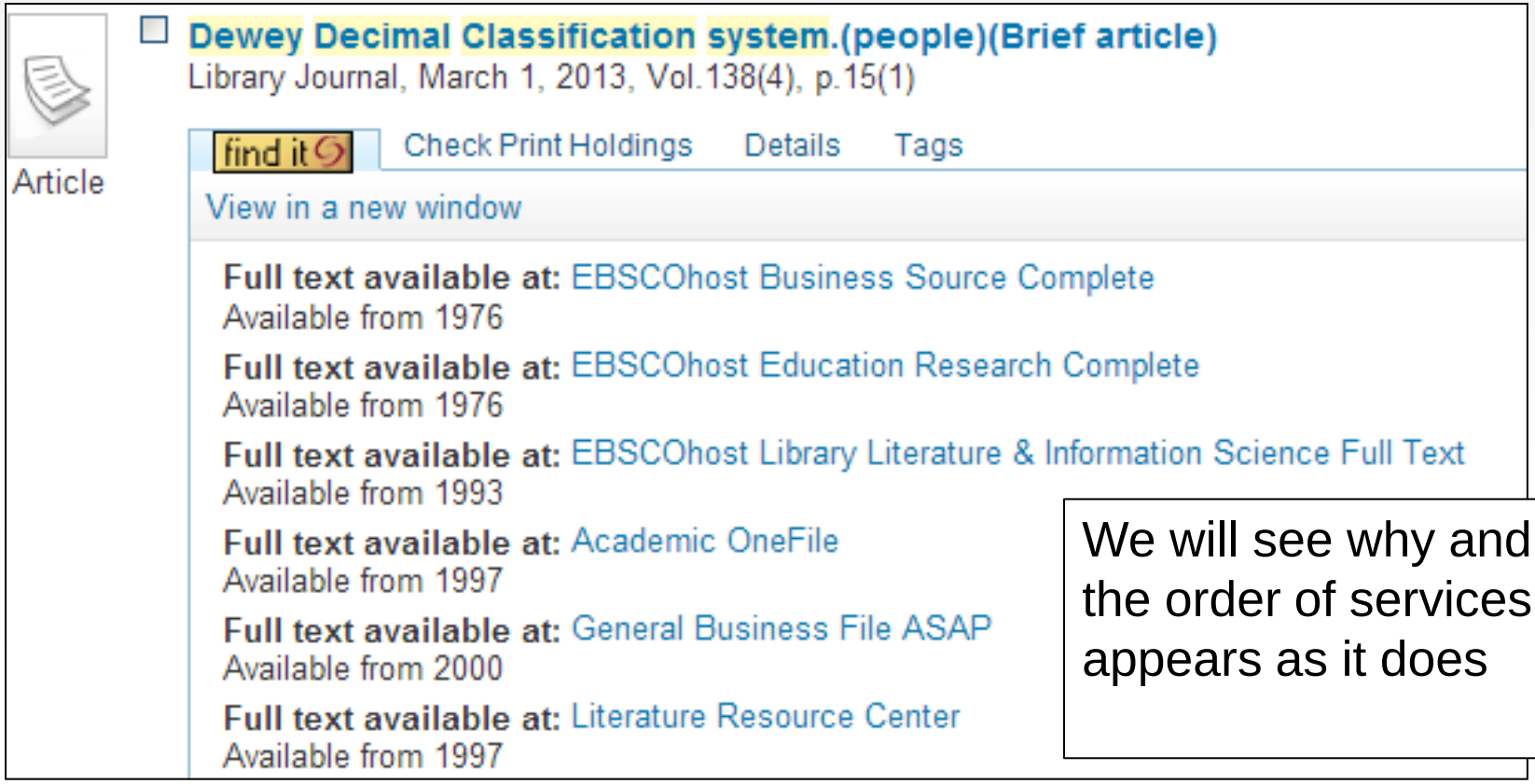
Online Electronic Services Order

- It is also possible to control the order in which the Online Electronic Services appear in the Primo ViewIt tab



We will see why and how the order of services here appears as it does

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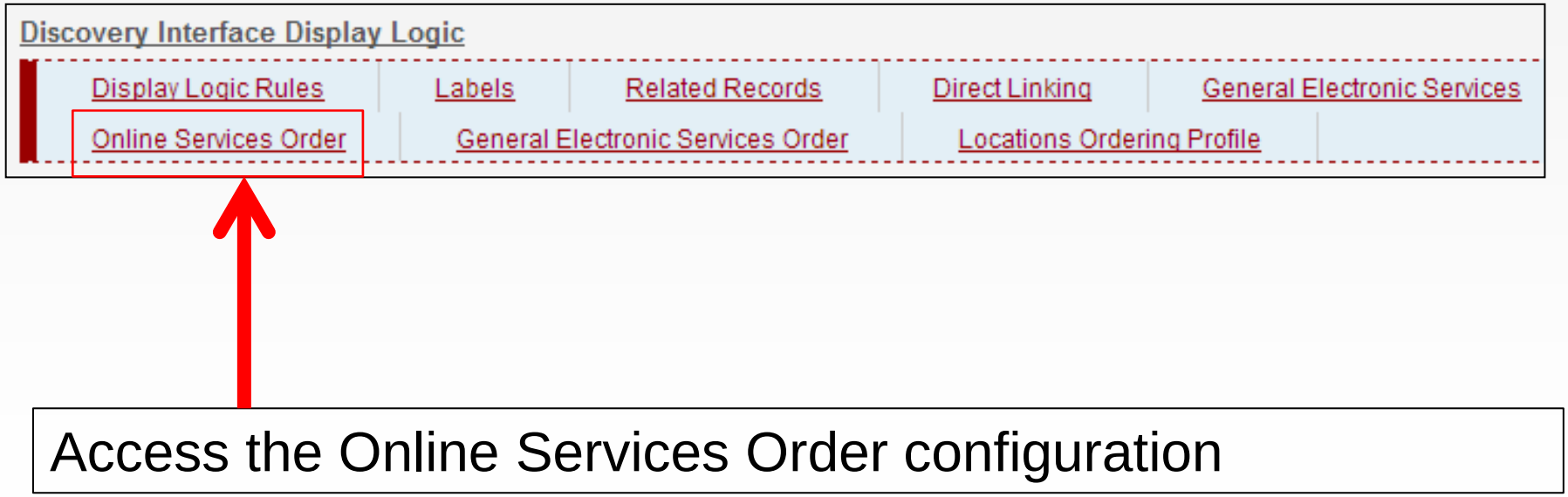
Online Services Order

- The Online Services Order configuration may be accessed from the Display Interface Display Logic section of the fulfillment configuration menu



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Online Services Order

- As we will see on the next slide, in the “Online Services Order” it is determined which packages and interfaces appear
  - At the top of the list
  - At the bottom of the list
  - In which order

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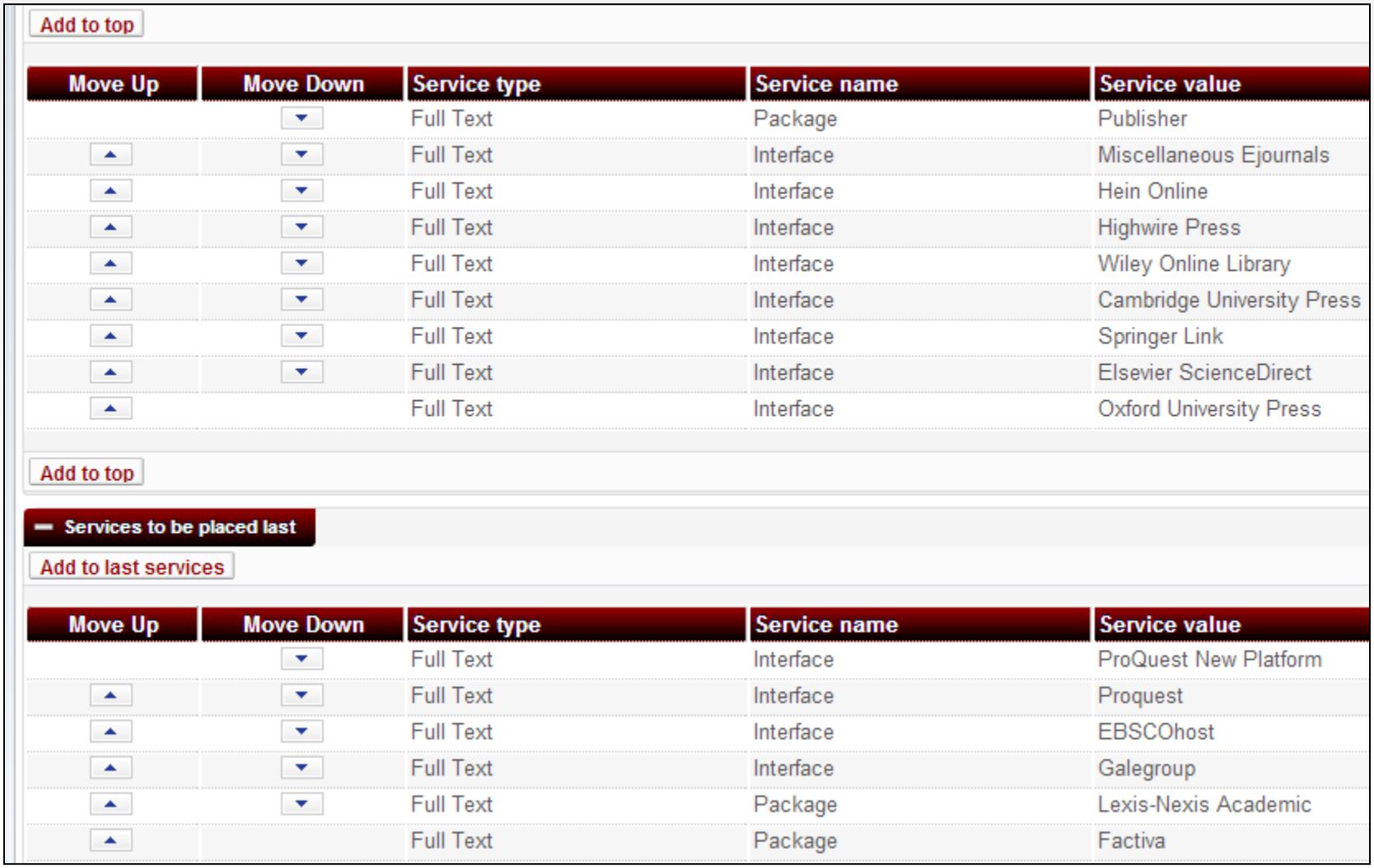
Online Services Order



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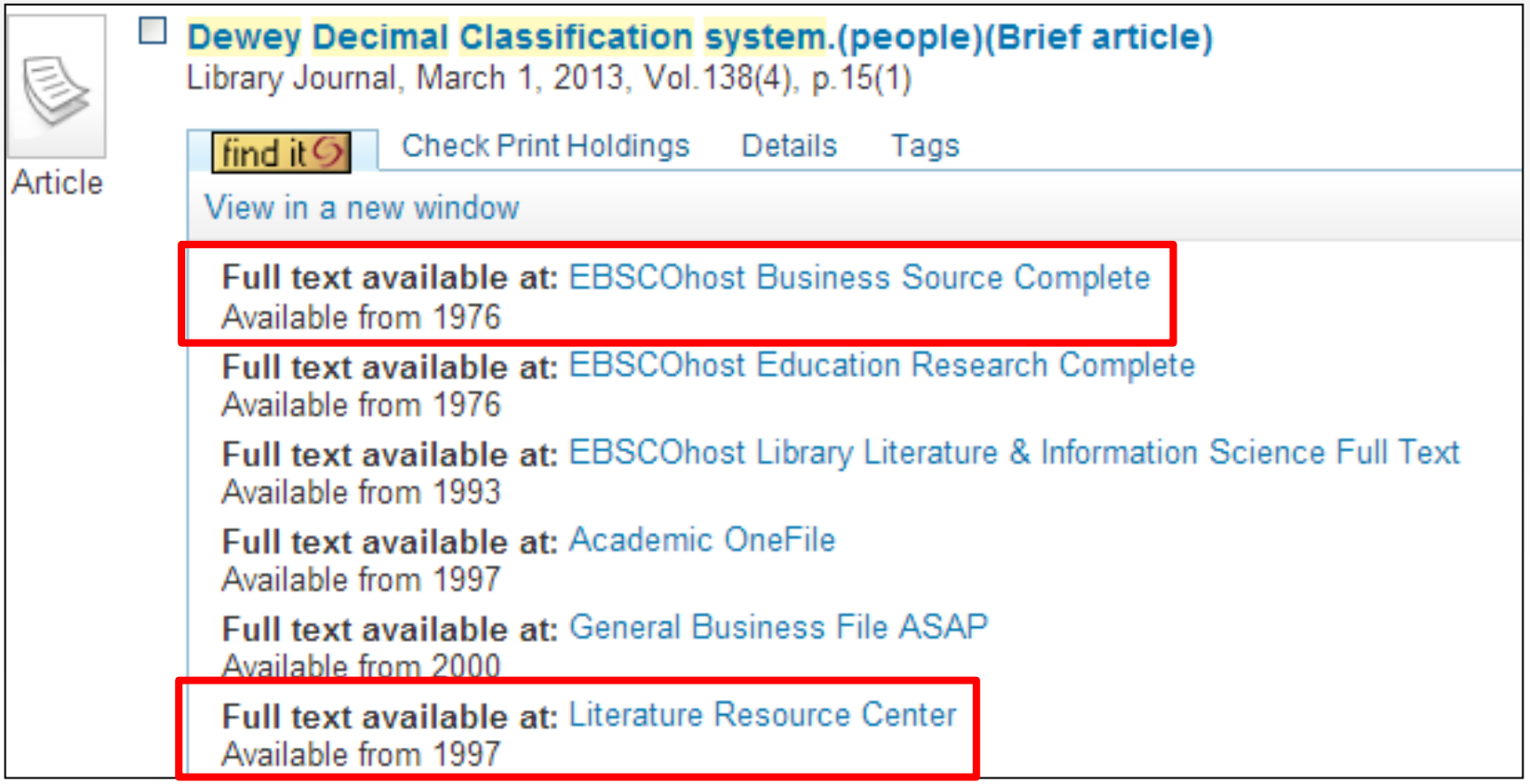
Online Services Order

- In our example

1. “EBSCOhost Business Source Complete” is at the top of the list
2. “Literature Resource Center” appears at the bottom of the list



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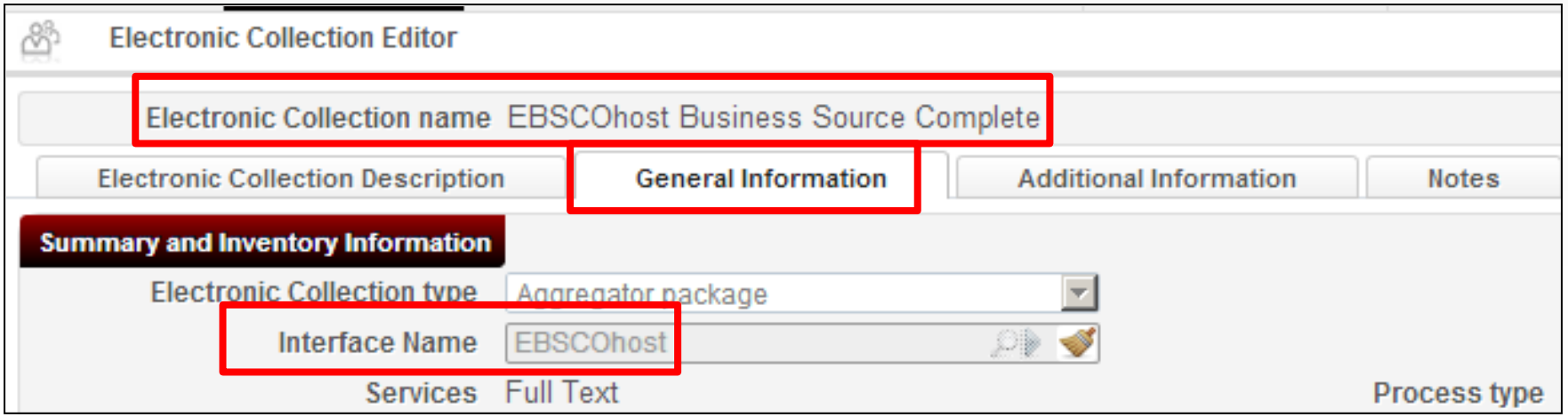
Online Services Order

- “EBSCOhost Business Source Complete” is a package in Interface name EBSCOhost
- You can see this by searching for electronic collection name and then clicking "edit" and looking in general information tab field interface name



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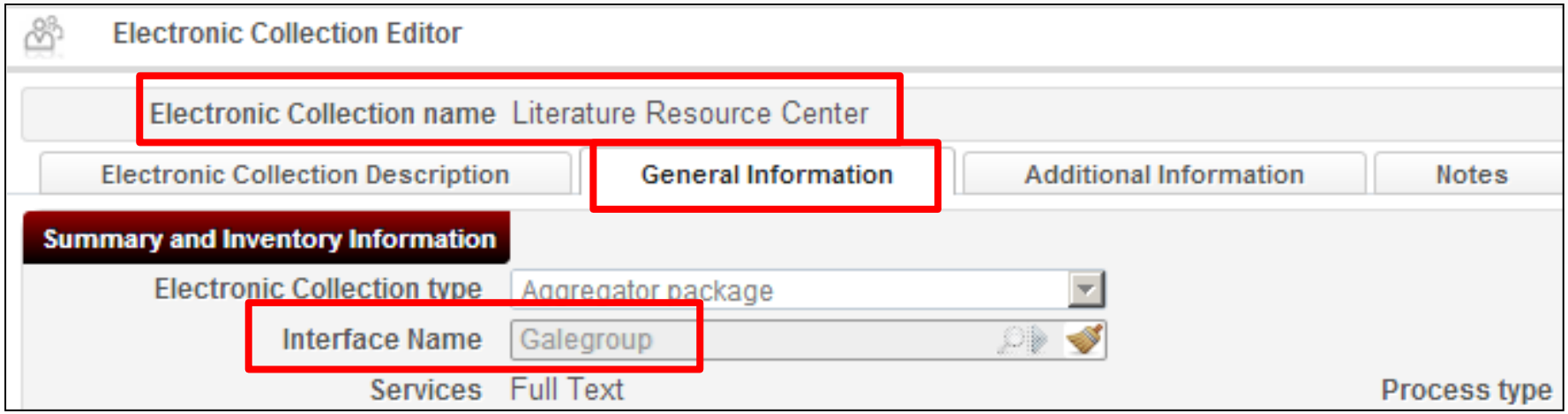
Online Services Order

- “Literature Resource Center” is a package in Interface name Galegroup
- You can see this by searching for electronic collection name and then clicking "edit" and looking in general information tab field interface name



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Online Services Order

- In the “Online Electronic Services Order” Interface EBSCOhost appears before Interface Galegroup

		Full Text	Interface	ProQuest New Platform
		Full Text	Interface	Proquest
		Full Text	Interface	EBSCOhost
		Full Text	Interface	Galegroup
		Full Text	Package	Lexis-Nexis Academic
		Full Text	Package	Factiva

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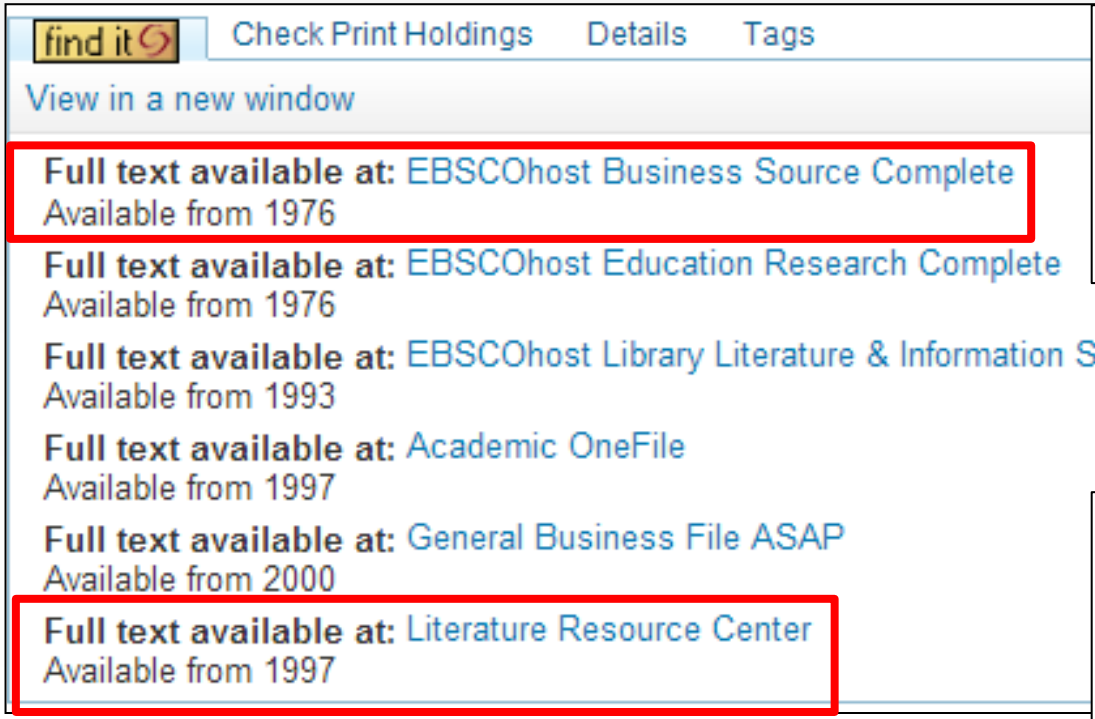
Online Services Order

- And therefore in Primo “EBSCOhost Business Source Complete” appears before “Literature Resource Center”



The first three here are all part of Interface Name EBSCOHost

The last three here are all part of Interface Name Galegroup

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Online Services Order

- If we change the online electronic services order as follows (reverse EBSCOhost and Galegroup) …

Before

Move Up	Move Down	Service type	Service name	Service value
		Full Text	Interface	ProQuest New Platform
		Full Text	Interface	Proquest
		Full Text	Interface	EBSCOhost
		Full Text	Interface	Galegroup
		Full Text	Package	Lexis-Nexis Academic
		Full Text	Package	Factiva

After

Move Up	Move Down	Service type	Service name	Service value
		Full Text	Interface	ProQuest New Platform
		Full Text	Interface	Proquest
		Full Text	Interface	Galegroup
		Full Text	Interface	EBSCOhost
		Full Text	Package	Lexis-Nexis Academic
		Full Text	Package	Factiva

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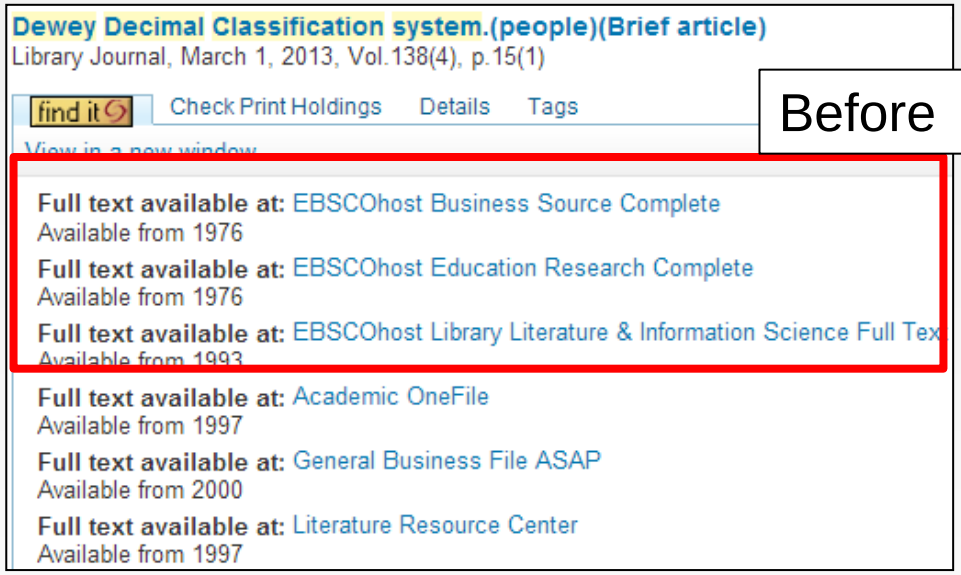
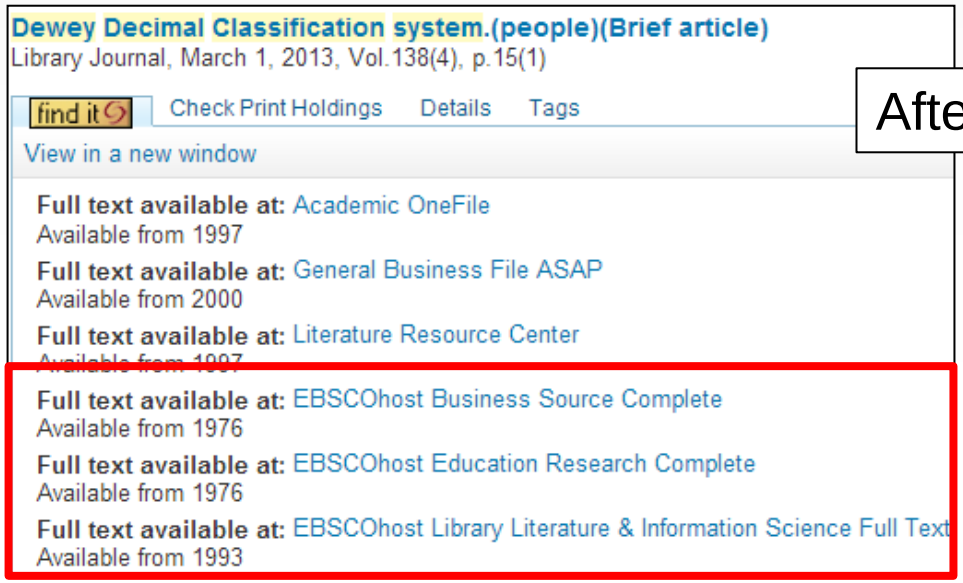
Online Services Order



Before



After

- Then we see this in Primo
- The three packages belonging to Interface name EBSCOhost are no longer at the beginning

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Online Services Order

- If we had scrolled to the bottom of the GetIt tab we would have seen that Lexis-Nexis Academic was always at bottom

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Online Services Order

- This is because the package “Lexis-Nexis Academic” is defined to appear after interface name EBSCOhost and after interface name Galegroup

Move Up	Move Down	Service type	Service name	Service value
		Full Text	Interface	ProQuest New Platform
		Full Text	Interface	Proquest
		Full Text	Interface	EBSCOhost
		Full Text	Interface	Galegroup
		Full Text	Package	Lexis-Nexis Academic
		Full Text	Package	Factiva

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Physical Inventory Order

- The sorting of the available physical inventory may be determined by the IP from which the access is being made

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Physical Inventory Order

- Libraries and campuses may be linked to an IP range

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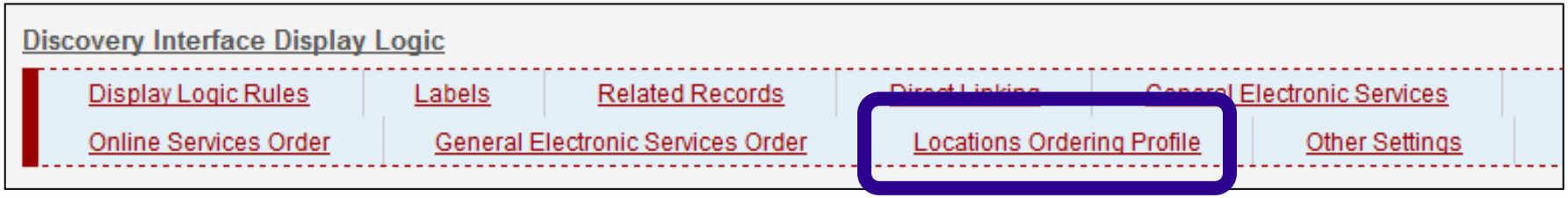
Physical Inventory Order

- The system may be set to compare the IP from which access is made with the owning campus and library of the title's inventory
- Resources that belong to libraries in the IP range from which access is made will be preferred in the Primo display



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General Electronic Services

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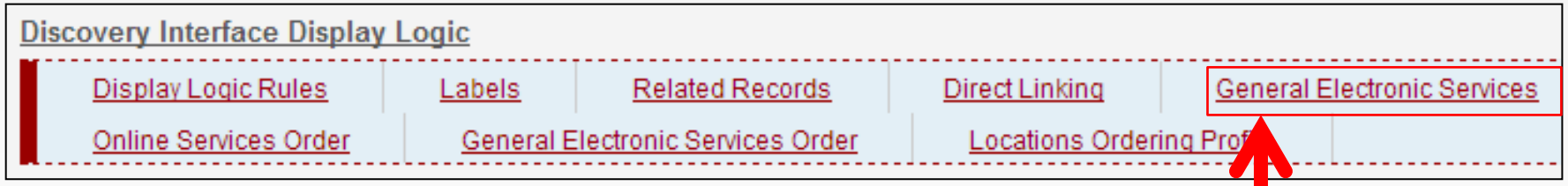
General Electronic Services



General Electronic Services

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General Electronic Services

- The General Electronic Service allows the library to define a service which uses a URL to search another site for information displayed on the page
- The URL automatically takes information from the record on the page and inserts it into the URL
- In this way the library can define general electronic services (such as Search in ProQuest Dissertations, Ask a Librarian, and so forth) that may be presented to patrons in Primo View It and Get It tabs

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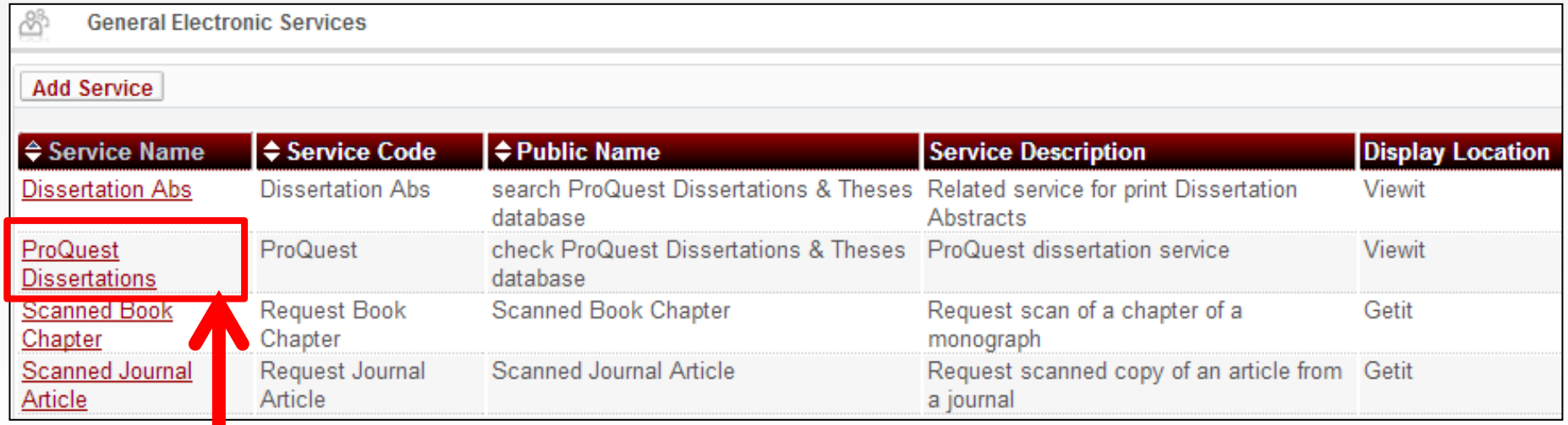
General Electronic Services

ProQuest Example

- Here are some examples of General Electronic Services



We will now look at ProQuest Dissertations

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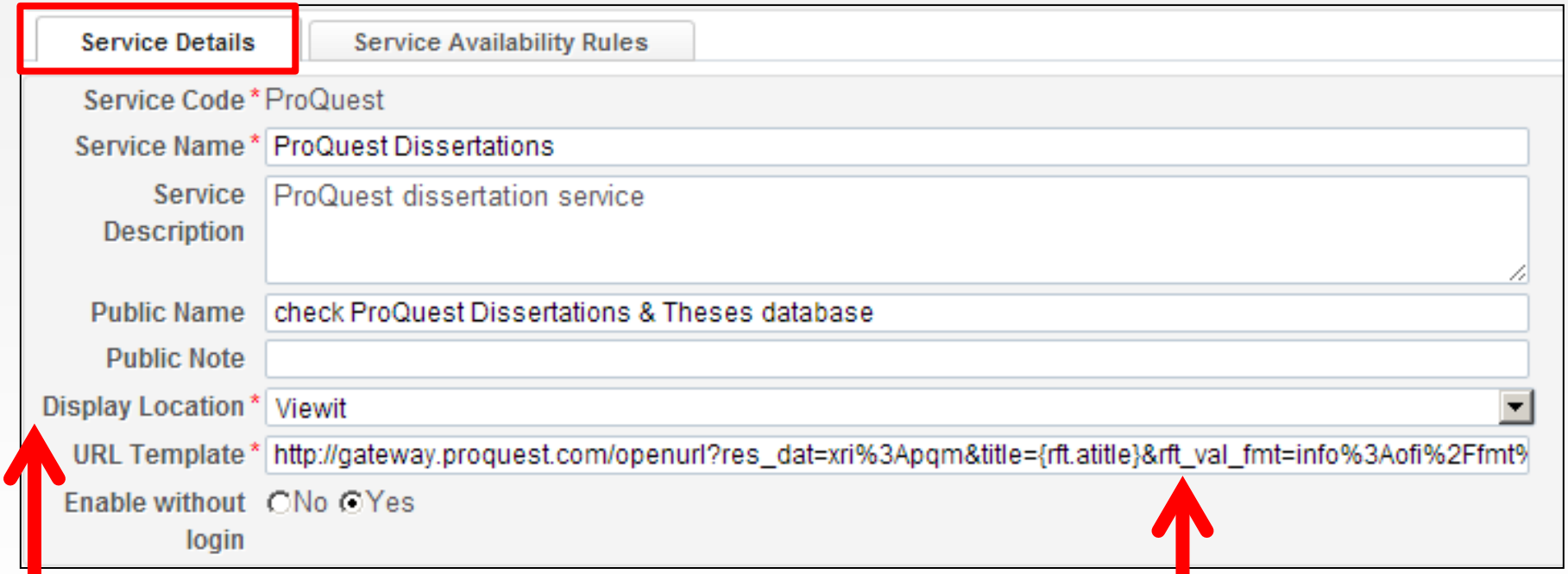
General Electronic Services

- Service details tab of General Electronic Service



Will appear in the ViewIt tab

Will go to this URL using this URL Template

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General Electronic Services

- Service Availability Rules tab of General Electronic Service

Will display if the genre is “dissertation”

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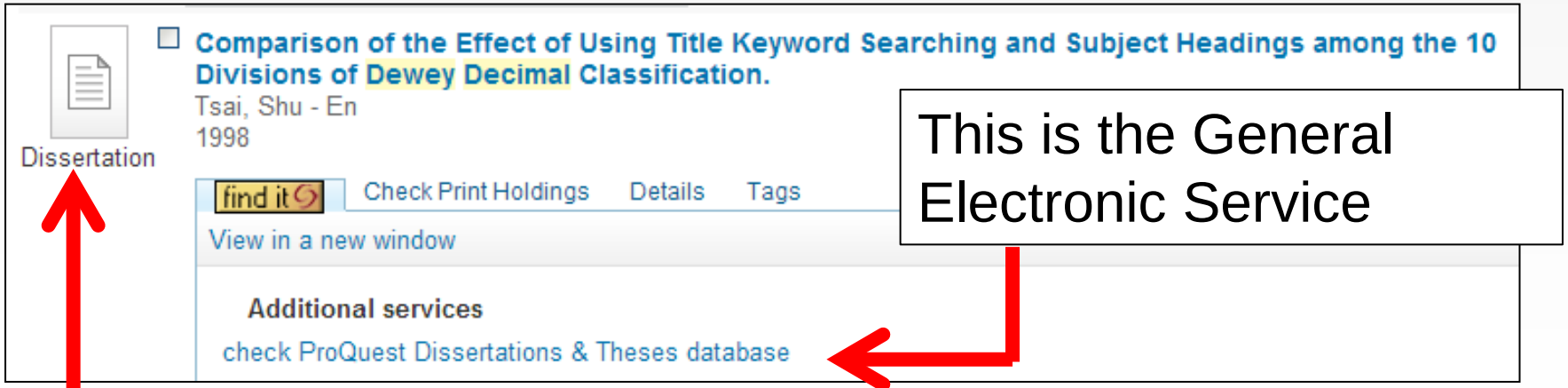
General Electronic Services

- Now if we search the Primo Central Index (PCI) for title “Comparison of the Effect of Using Title Keyword Searching and Subject Headings among the 10 Divisions of Dewey Decimal Classification” we see the following in the ViewIt tab:



This is the General Electronic Service

Will display if the genre is “dissertation”

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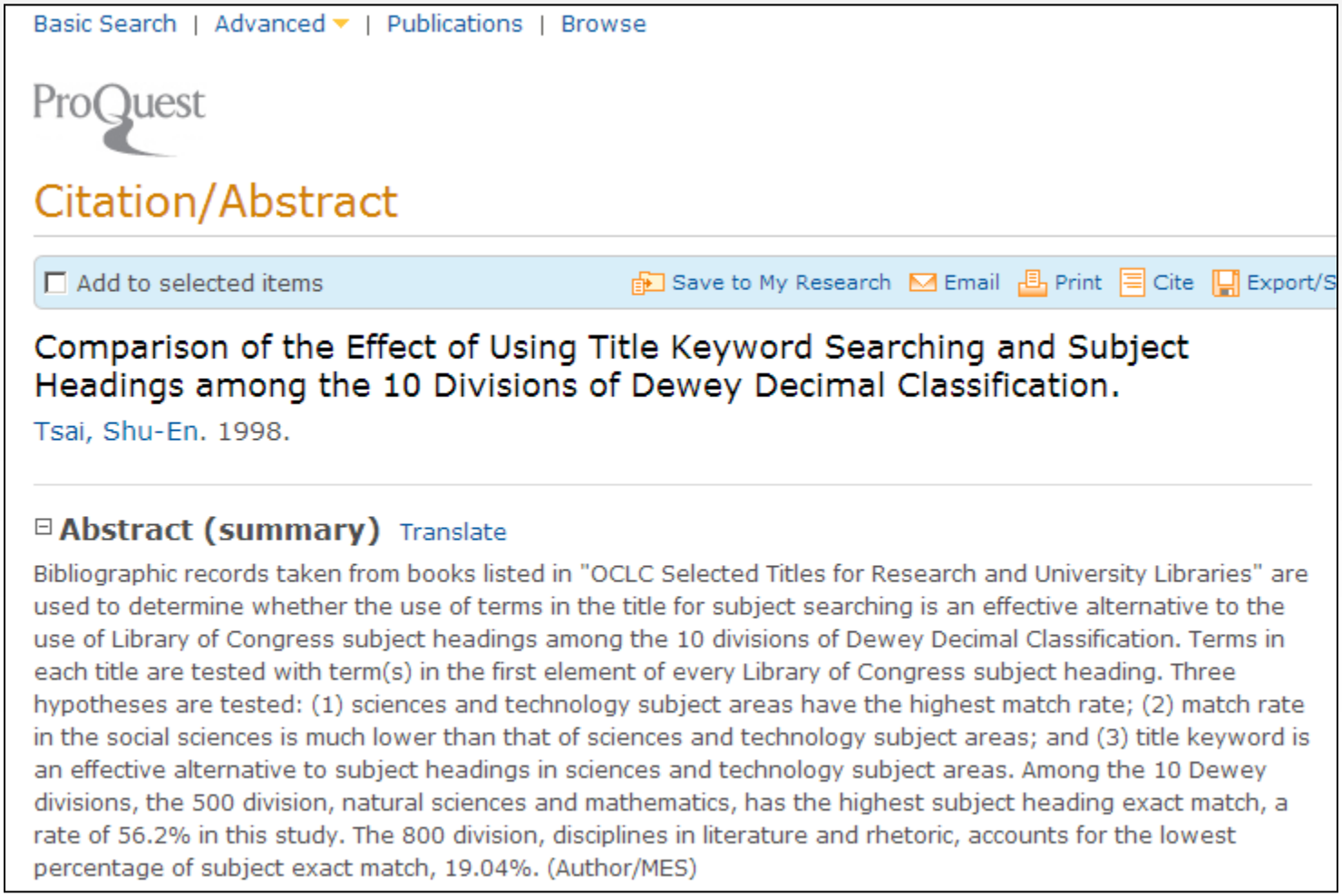
General Electronic Services

- Clicking the General Electronic Service link brings the record in ProQuest



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THANK YOU!

moshe.shechter@exlibrisgroup.com

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