



## Fulfillment Configuration

Cause & Effect

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**ExLibris**  
a ProQuest Company

### ■ Introductions

- Moshe Shechter  
Alma Product Manager

With Ex Libris for 14 years. After a couple of years on the Aleph development team, I joined the Alma team in 2010 as business analyst and later as product manager.

My focus is in Fulfillment, Resource Sharing, User Management and Integrations.

## Objectives and Target Audience

- By the end of this sessions you will understand the basic elements of physical and electronic fulfillment in Alma
- Session Target Audience:
  - Fulfillment administrators, new to Alma

## Agenda

- |   |                              |   |  |
|---|------------------------------|---|--|
| 1 | Fulfillment Units & Policies | 5 | Direct Linking                           |
| 2 | Circulation Desks            | 6 | General Electronic Services              |
| 3 | Display Logic Rules          | 7 | Services Order                           |
| 4 | Labels                       | 8 | Next Steps, Support Resources and Survey |

## Fulfillment Units & Policies



## TOU & Policies

TOU



Policies



## TOU & Policies - Loans

You are configuring: Training and Integration

**Terms of Use Details**

Name \*

Description

Is Loanable	Is Loanable
Is Recalable	Is Recalable
Due Date	1 month
Requested Item Due Date	1 week Requested Item Due Date
Recall Period	10 day Recall Period
Renew Fee	No Renew Fee
Lost Item Fine	10 Lost Item Fine
Lost Item Replacement Fee	25 Lost Item Replacement Fee
Lost Item Replacement Fee Refund Ratio	100 % Lost Item Refund
Maximum Fine	No Maximum Fine (Default Maximum Fine)
Overdue Fine	0.40 Open Days Overdue Fine
Recalled Overdue Fine	No Recall Overdue Fine (Default Value for recalled overdue fine)
Grace Period	10 day Grace Period (10 Day grace period)
Is Renewable	Is Renewable
Maximum Renewal Period	No Maximum Renew Period (Default Maximum Renewal Period)
Closed Library Due Date Management	No Change To Due Date (Default value for ClosedHourManagement)
Cancelled Recall Due Date	Restore to original due date (This option will take the due date of the loan before the recall)
Overdue Notification Fine Type 1	Overdue 2 days (Overdue 2 days)
Overdue Notification Fine Type 2	Overdue 5 days (Overdue 5 days)
Overdue Notification Fine Type 3	No Overdue Fine (Default value - No Overdue Fine)
Overdue Notification Fine Type 4	No Overdue Fine (Default value - No Overdue Fine)
Overdue Notification Fine Type 5	No Overdue Fine (Default value - No Overdue Fine)
Block When Overdue	Block 25 days after Overdue (Block 25 days when Overdue)
Maximum Period For Overdue Block	No Maximum Block Period (No Maximum Block Period for Block When Overdue)

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## TOU & Policies - Requests

You are configuring: Training and Integration

**Terms of Use Details**

Name \*

Description

Is Requestable	Is Requestable
Pickup Locations	Pickup In Institution
Hold Shelf Period	7 day Hold Shelf (Default value for HoldShelfPeriod)
Is Digitizeable	
Is Requestable for Resource Sharing	Not Requestable For Resource Sharing (Item is not requestable for Resource Sharing)
Request Priority	Medium (Medium)
On Shelf Request Policy	Use fulfillment unit definition (Use fulfillment unit definition)
Personal delivery	Personal Delivery -test (Do not deliver items at all)
Personal delivery fee	Personal Delivery Fee - No Fee (Personal delivery is not charged with a fee)
Automatically convert to resource sharing	Do not convert to resource sharing (Do not convert to resource sharing)
Digitization Fee per Digitization	No Fee (Digitization request is not charged with a fee)
Digitization Fee per Page	No Fee (Digitization request is not charged with a fee per page)

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## TOU & Policies - Bookings

### Terms of Use Details

You are configuring: Training and Integration

#### Terms of Use Details

Name \*

Description

Booking release time	Booking Release Time - 30 minutes (Booking Release Time - 30 minutes)
Is item bookable	Item is bookable (Item is bookable)
Maximum allowed booking length	Maximum Allowed Time - 2 days (Maximum Allowed Time - 2 days)
Preview period	Preview Period - 30 minutes (Preview Period - 30 minutes)
Pickup Locations	Pickup In Institution
Future limit	Future Limit - 7 days (Future Limit - 7 days, Items can be booked up to 7 days in advance)
Back to back booking	1 day (1 day between booking of the same resource by the same user)

## TOU Rules



TOU



TOU



TOU

## TOU Rules

**Edit Fulfillment Unit**

You are configuring: Training and Integration

**Fulfillment Unit Details** **Fulfillment Unit Locations** **Fulfillment Unit Rules**

**Fulfillment Unit**

Code Regular Name Regular

Rule Type **Loan**

Filter: All

[Add Rule](#)

Enabled	Move Up	Move Down	Rule Name
			<a href="#">1 hour fine on all hours item policy 1 hour loan</a>
			<a href="#">1 minute fine on all hours item policy 1 minute lo</a>
			<a href="#">Staff 6 week Staff Regular</a>
			<a href="#">High Priority 4 week High Priority Regular</a>
			<a href="#">Regular Priority 3 week Regular Priority Regular</a>
			<a href="#">Low Priority 2 week Low Priority Regular</a>
			<a href="#">1 semester loan to faculty</a>

## 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

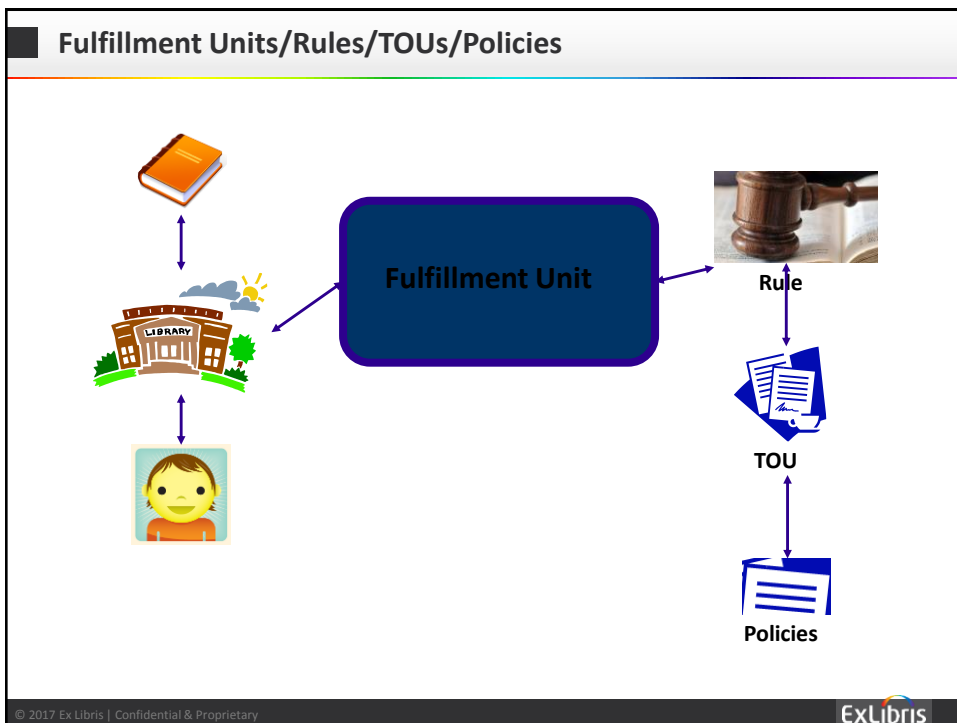
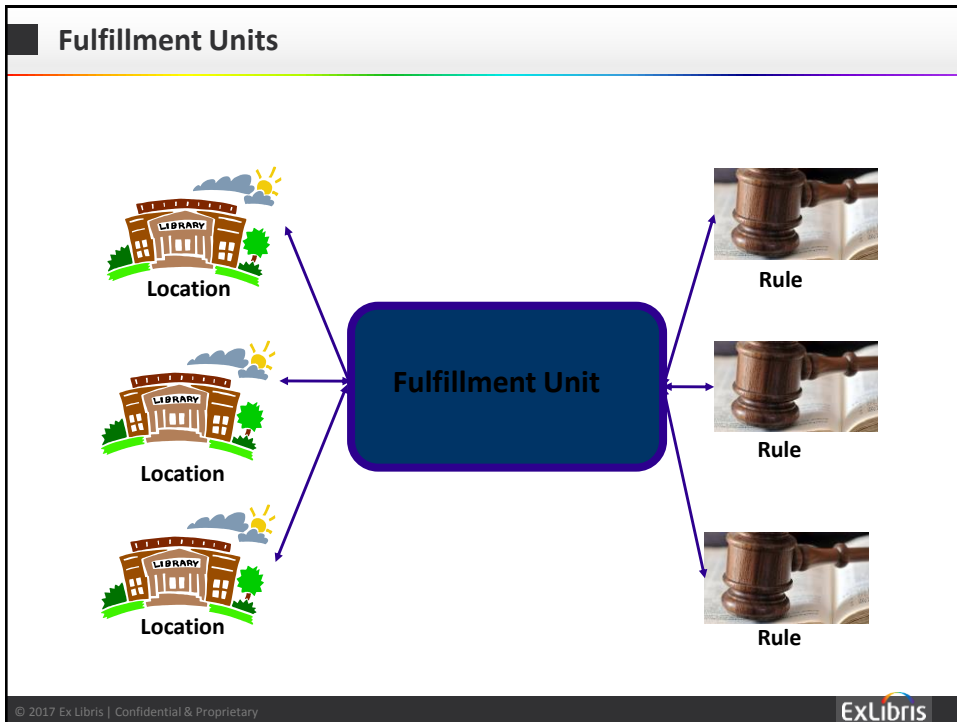
[Possible Values >](#)

**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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## Loans' Relevant TOUs

Back to Home Page ✖

ACQUISITIONS	RESOURCE MANAGEMENT	FULFILLMENT	ADMINISTRATION
<b>Purchase Order Lines</b> Search for PO Line Manage Trials <b>Purchase Order</b> Delete PO <b>Receiving and Invoicing</b> Search for Invoice Receive Create Invoice Review Approve Waiting for Payment <b>Post-Receiving Processing</b> Receiving Department Items Scan In Items <b>Acquisitions Infrastructure</b> Vendors Funds and Ledgers Transfer Funds	<b>Search and Sets</b> Repository Search Manage Sets Manage Exports Top Level Collections <b>Cataloging</b> Search External Resources Browse Shelf Listing Open Metadata Editor <b>Create Inventory</b> Add Local Electronic Collection Add Local Portfolio <b>Manage Inventory</b> Manage Electronic Resource Activation <b>Import</b> Import Monitor and View Imports Resolve Import Issues <b>Resource Configuration</b>	<b>Checkout/Checkin</b> Manage Patron Services Return Items <b>Resource Requests</b> Pick From Shelf Scan In Items Expired Hold Shelf Active Hold Shelf Manage In Process Items Monitor Requests & Item Processes <b>Resource Sharing</b> Partners Rota Templates <b>Advanced Tools</b> Fulfillment Configuration Utility Create Fulfillment Sets Bulk Change Due Dates View Restore Request Jobs View Lost Loan Jobs Office Simulation	<b>User Management</b> Find and Manage Users Purge User Records Load Desk/Department Operators Bulk Fine Waiving Roles Report Privileges Report Manage Sets User Identifier Types <b>User Management Configuration</b> Configuration Menu <b>General Configuration</b> Configuration Menu Alma Developers <b>Analytics</b> Design Analytics Configuration Menu Subscribe to Analytics <b>Manage Jobs</b>

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## Loans' Relevant TOUs

ExLibris Alma Tasks Analytics Currently at Main Library - Default Circ...

Fulfillment Configuration Utility

Patron Identifier \* Johnson, Scott - Staff Item Barcode \* 96494 OK

Optional Return Date Calculate Overdue Fine

Fulfillment Unit Name Regular

Fulfillment Unit Rule Staff 6 week Staff Regular

Terms Of Use Name 6 week Staff Regular

Due date if the item would be loaned now 27/07/2014 23:59:00 EDT

**Terms of Use Details**

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

ExLibris Alma - Tasks Analytics Currently at Main Library - Default Cir

Fulfillment Configuration Utility

Patron Identifier \* Johnson, Scott - Staff Item Barcode \* 96494

Optional Return Date 20/08/2014 Calculate Overdue Fine

Fulfillment Unit Name Regular

Fulfillment Unit Rule Staff 6 week Staff Regular

Terms Of Use Name 6 week Staff Regular

Due date if the item would be loaned now 27/07/2014 23:59:00 EDT

Overdue fine for given return date 25.00 USD

Terms of Use Details

Policy Type	Policy Name	Policy Description
Maximum Fine	25.00 Maximum Fine	Default lost item replacement refund
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	
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 Recalable	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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## Policies -> TOUs

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Policy Management

You are configuring: Training and Integration

Fulfillment Policies

Policy Type Due Date Find : It : Policy Name Go

Add Fulfillment Policy 1 - 17 of 17 Records Tools

Policy Type	Policy Name	Value	Unit Of Measurement	Is Default	Policy Owner	Actions
Due Date	1 day Loan	1	Days		Institution	
Due Date	1 hour Loan	1	Hours		Institution	Edit
Due Date	1 hour due date	1	Hours		Institution	Duplicate
Due Date	1 minute due date	1	Minute		Institution	Delete
Due Date	1 semester	4	Month		Institution	Show related terms of use

Policy Details

You are configuring: Training and Integration

Policy Name 1 day Loan

Policy terms of use Tools

Name	Type	TOU Owner	Description	
1 day Staff Short	Loan	Institution	1 day Staff Short	Edit
1 day Staff Limited	Loan	Institution	1 day Staff Limited	Edit

Cancel ExLibris

## TOUs -> Rules

**Terms of Use Management**

You are configuring:

**Fulfillment Terms Of Use**

Terms Of Use Type: Loan Find:  In: Name Go

[Add a Terms Of Use](#) 1 2 3 4 5 6 Go 1 - 20 of 58 Records [Tools](#)

	Name	Type	TOU Owner	Description	Actions
1	<a href="#">120DAY</a>	Loan	Institution	120 day loan for regular items for staff	<a href="#">Edit</a>
2	<a href="#">120DAYNORECALL</a>	Loan	Institution	Set up for ILL for now. 120 day loan with no recalls.	<a href="#">View</a>
3	<a href="#">120DAYRECALLFINES</a>	Loan	Institution	120 day loan with Recall Fines.	<a href="#">Delete</a>
4	<a href="#">12MONTH</a>	Loan	Institution	12 month loan for regular items for faculty	<a href="#">Show related fulfillment rules</a>
5	<a href="#">12MONTHNORECALL</a>	Loan	Institution	This is for the University VIPs. Loan is for 12 months and recalls are not allowed.	
6	<a href="#">14DAY</a>	Loan	Institution	14 day loans	<a href="#">Actions</a>

**Related Fulfillment Rules**


TOU Name: 120DAY

**TOUs related Fulfillment rules**

	Enabled	Rule Name	Fulfillment Unit	Description	Rule Owner
1	<input checked="" type="checkbox"/>	<a href="#">Standard Staff</a>	<a href="#">Standard Circulation for Law regular loan items</a>	120 day loan	Institution

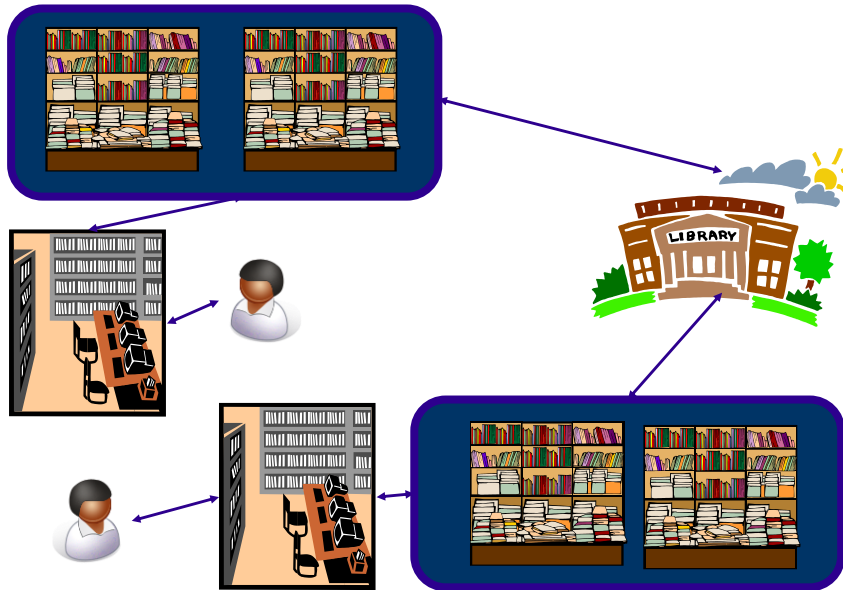
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## Circulation Desks



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## Circulation Desks



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## Circulation Desk Operators

ExLibris Alma - Tasks Analytics Currently at: Main Library - Default Circ...

Circulation Desk - Operators

You are configuring: Main Library  
Circulation Desk Description - Circulation Desk Name: Default Circulation Desk

General Details Physical Locations Work order types Operators Automatic Printing

Operators

Add Operator Tools

Name	Circulation Desk Operator	Circulation Desk Operator - Limited	Circulation Desk Manager	Requests Operator	
Allen, Norene	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
Allenburg, Hans-Henning	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Remove
Ariel-Joel, Yaala	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Remove
Ariel-Joel, Yaala	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Remove

ExLibris Alma - Tasks Analytics Currently at: Main Library - Default Circ...

User Roles Details

Name: Andrews, Dean  
Internal  
Manage fulfillment activities  
User group: Staff  
Primary identifier: dean  
Record type: Public

Role Information

Role name: Circulation Desk Operator  
Status: Active  
Scope: Main Library  
Expiry Date:

Role parameters

Circulation desk: Default Circulation Desk  Add circulation desk

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## Circulation Desk Operators

**Alma**

[Tasks](#)
[Analytics](#)
Currently at: Main Library - Default Circ...

Please choose your current desk/department

I am physically at:

None of these  
None of these  
Main Library - Default Circulation Desk

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## Circulation Desk Attributes

**Alma**

[Tasks](#)
[Analytics](#)
Currently at: Main Library - Default Circ...

Circulation Desk - General Information

You are configuring: Main Library

General Details | Physical Locations | Work order types | Operators | Automatic Printing

**General Details**

Code \* DEFAULT\_CIRC\_DESK  
Name \* Default Circulation Desk

**Printing Information**

Creates request \*

Automatically Print Slip ☒ No ☐ Yes  
External Identifier ☒ No ☐ Yes  
Scan item barcode \*     
Scan Request ID

Activated	Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In	Actions
1	The Common cold	Digitization	CVB1128160-10	Patron digitization request	Implementer, Ex Libris	exl_impl	1		

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## Circulation Desk Attributes

Payment Information

Credit card ☒

Cash ☒

Online ☐

Check ☐

Print receipt? Yes

Receipt copy Email

Self Check Information

Has self check ☐

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## Circulation Desk Attributes

Circulation Desk - Work Order Types

You are configuring:

Circulation Desk Name Default Circulation Desk

Circulation Desk Description

General Details Physical Locations Work order types Operators Automatic Printing

Work order types

Add work order

Work order type	Work order time (days)
1 Binding	2

Scan In Items

Scan in Items

Change Item Information

Scan in Items

Automatically Print Slip ☒ No ☐ Yes

External Identifier ☒ No ☐ Yes

Work Order Type Binding

Set Status To Binding Prep

Done ☒ No ☐ Yes

Scan item barcode \*

Scan Request ID

OK

OK

Create Item

No records were found.

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## Circulation Desk Attributes

ExLibris AI Circulation Desk

General Details

Filter: All

Add Rule

Input Parameters

No records were found.

Name:  Operator:  Possible Values > Value:

Out Location:  Material Type:  Result:

Printer:

Enabled	Move Up	Move Down	Rule Name	Description
<input checked="" type="checkbox"/>			Print Rule	-

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## Blocks at Desk

Physical Fulfillment

Fulfillment Units Terms of Use and Policies **Block Preferences**

Workbench Preferences

Workbench Preferences List

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	Override By Manager		Both
Patron is not active	Override By All		Loan
Patron loan limit exceeded	Block		Renew
	Override By Operator		

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## Display Logic Rules



### 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

1 [School library journal : SLJ.](#)  
**Journal** (New York : RR Bowker Co Xerox Co Vol. 8, no. 1 (Sept. 1961)-)  
 ISSN: 0362-8930  
 Subject: Périodique électronique (Descripteur de forme) -- Ressource Internet (Descripteur de forme) -- Littérature pour jeunes adultes F  
 Language: English Record number: (CONSER) 75641012  
 Availability: [Electronic version](#) at Academic OneFile: Full Text  
[Electronic version](#) at EBSCOhost Education Research Complete: Full Text  
[Electronic version](#) at EBSCOhost Library Literature & Information Science Full Text: Full Text and others  
[View It](#) | [Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) | [Portfolio List](#) | [View License Information](#) | [More info](#)

Click here to see full list of  
Portfolios

### Display Logic Rules - Electronic

1	<input type="checkbox"/> <b>EBSCOhost Education Research Complete: Full Text</b> Available from 1974	<ul style="list-style-type: none"> <li>• There are a total of 7 portfolios with Full text</li> <li>• 5 portfolios include coverage of 2013 (green arrows)</li> <li>• 2 portfolios do not include coverage of 2013 (red arrows) (not included in the “threshold” of the desired year)</li> </ul>
2	<input type="checkbox"/> <b>EBSCOhost Library Literature &amp; Information Science Full Text: Full Text</b> Available from 1996	
3	<input type="checkbox"/> <b>Factiva: Full Text</b> Available from 1997 until 2010	
4	<input type="checkbox"/> <b>Academic OneFile: Full Text</b> Available from 2000	
5	<input type="checkbox"/> <b>General Business File ASAP: Full Text</b> Available from 2000	
6	<input type="checkbox"/> <b>General OneFile: Full Text</b> Available from 2000	
7	<input type="checkbox"/> <b>Lexis-Nexis Academic: Full Text</b> Available from 2003 until 2004	

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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

Article ☐ **Tipping a sacred cow: a new scheme may override the Dewey debate.(The NEXT BIG Thing)(Dewey Decimal System)**  
Harris, Christopher  
School Library Journal, March, 2013, Vol.59(3), p.16(1)  
[find it](#) [Check Print Holdings](#) [Details](#) [Tags](#)

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

Results 1 - 10 of 50 for Articles sorted by: Relevance ▼

Article ☐ **Tipping a sacred cow: a new scheme may override the Dewey debate.(The NEXT BIG Thing)(Dewey Decimal System)**  
Harris, Christopher  
School Library Journal, March, 2013, Vol.59(3), p.16(1)  
[find it](#) [Check Print Holdings](#) [Details](#)  
[View in a new window](#)

Full text available at: EBSCOhost Education Research Complete  
Available from 1974

Full text available at: EBSCOhost Library Literature & Information Science Full Text  
Available from 1996

Full text available at: Academic OneFile  
Available from 2000

Full text available at: General Business File ASAP  
Available from 2000

"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

Discovery Interface Display Logic				
<a href="#">Display Logic Rules</a>	<a href="#">Labels</a>	<a href="#">Related Records</a>	<a href="#">Direct Linking</a>	<a href="#">General Electronic Services</a>
<a href="#">Online Services Order</a>	<a href="#">General Electronic Services Order</a>	<a href="#">Locations Ordering Profile</a>		

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

Discovery Interface Display Logic

Help Support, Ex Libris Back

Add Rule Tools

Active	Move Up	Move Down	Rule Description	
<input checked="" type="checkbox"/>			Hide service Selected Full Text if exists service Full Text	Remove
<input checked="" type="checkbox"/>			Hide service Full Text with Package = Factiva if exists service Full Text	Remove
<input checked="" type="checkbox"/>			Hide service Full Text with Package = Lexis-Nexis Academic if exists service Full Text	Remove
<input checked="" type="checkbox"/>			Hide service Full Text with Package = General OneFile if exists service Full Text with Package = Academic OneFile	Remove
<input checked="" type="checkbox"/>			Hide service Full Text with Package = Factiva if exists service Full Text with Package = Lexis-Nexis Academic	Remove

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”

Results 1 - 10 of 50 for Articles

Article

☒ Tipping a sacred cow: a new scheme may override the Dewey debate.(The NE Decimal System)  
Harris, Christopher  
School Library Journal, March, 2013, Vol.59(3), p.16(1)

find it Check Print Holdings Details Tags

View in a new window

Full text available at: EBSCOhost Education Research Complete  
Available from 1974

Full text available at: EBSCOhost Library Literature & Information Science Full Text  
Available from 1996

Full text available at: Academic OneFile  
Available from 2000

Full text available at: General Business File ASAP  
Available from 2000

If this exists ...

Then do not show this...

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## Display Logic Rules - Electronic

- First we will click "Add Rule"

Discovery Interface Display Logic

**Add Rule**

Active	Move Up	Move Down	Rule Description
<input checked="" type="checkbox"/>			Hide service Selected Full Text if exists service Full Text
<input checked="" type="checkbox"/>	▲	▼	Hide service Full Text with Package = Factiva if exists service Full Text
<input checked="" type="checkbox"/>	▲	▼	Hide service Full Text with Package = Lexis-Nexis Academic if exists service Full Text
<input checked="" type="checkbox"/>	▲	▼	Hide service Full Text with Package = General OneFile if exists service Full Text with Package = Academic OneFile
<input checked="" type="checkbox"/>	▲		Hide service Full Text with Package = Factiva if exists service Full Text with Package = Lexis-Nexis Academic

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## Display Logic Rules - Electronic

- Then we make the conditions

**Add Rule**

For user from groups:

hide service

with

with value

if exists service

with

with value

[Close](#) [Add](#) [Add and Close](#)

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

Discovery Interface Display Logic

[Add Rule](#)


Active	Move Up	Move Down	Rule Description
<input checked="" type="checkbox"/>	▲	▼	Hide service Selected Full Text if exists service Full Text
<input checked="" type="checkbox"/>	▲	▼	Hide service Full Text with Package = Factiva if exists service Full Text
<input checked="" type="checkbox"/>	▲	▼	Hide service Full Text with Package = Lexis-Nexis Academic if exists service Full Text
<input checked="" type="checkbox"/>	▲	▼	Hide service Full Text with Package = General OneFile if exists service Full Text with Package = Academic OneFile
<input checked="" type="checkbox"/>	▲	▼	Hide service Full Text with Package = Factiva if exists service Full Text with Package = Lexis-Nexis Academic
<input checked="" type="checkbox"/>	▲	▼	Hide service Full Text with Package = EBSCOhost Library Literature & Information Science Full Text if exists service Full Text with Package = EBSCOhost Education Research Complete

[Add Rule](#)

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## Display Logic Rules - Electronic

 ☐ **Tippling a sacred cow: a new scheme may override the Dewey debate.(The NE Decimal System)**  
Harris, Christopher  
School Library Journal, March, 2013, Vol.59(3), p.16(1)

[find it](#) [Check Print Holdings](#) [Details](#) [Tags](#)

**Before**


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Full text available at: EBSCOhost Education Research Complete  
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Full text available at: EBSCOhost Library Literature & Information Science Full Text  
Available from 1996

Full text available at: Academic OneFile  
Available from 2000

Full text available at: General Business File ASAP  
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 ☐ **Tippling a sacred cow: a new scheme may override the Dewey debate.(The NEXT BIG Thing)(Dewey Decimal System)**  
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Available from 2000

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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

Article

**Tipping a sacred cow: a new scheme may override the Dewey debate.(The NEXT BIG Thing)(Dewey Decimal System)**  
 Harris, Christopher  
 School Library Journal, March, 2013, Vol.59(3), p.16(1)

find it Check Print Holdings Details Tags

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 Available from 2000

Full text available at: General Business File ASAP  
 Available from 2000

Interface Name EBSCOhost

Interface Name Galegroup

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## Display Logic Rules - Electronic

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

**Add Rule**

For user from groups: Alumni, Doctoral, Faculty, Law Faculty

hide service: Full Text

with: Interface

with value: EBSCOhost

if exists service: Full Text

with: Interface

with value: Galegroup

Close Add Add and Close

Discovery Interface Display Logic

**Add Rule**

Active	Move Up	Move Down	Rule Description
✓			Hide service Full Text with Interface = EBSCOhost if exists service Full Text with Interface = Galegroup

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## Display Logic Rules - Electronic

**Tippling a sacred cow: a new scheme may override the Dewey debate.(The NEXT BIG Thing)(Dewey Decimal System)**

Harris, Christopher  
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[find it](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#)

Full text available at: [EBSCOhost Education Research Complete](#)  
Available from 1974

Full text available at: [EBSCOhost Library Literature & Information Science Full Text](#)  
Available from 1996

Full text available at: [Academic OneFile](#)  
Available from 2000

Full text available at: [General Business File ASAP](#)  
Available from 2000

Before

**Tippling a sacred cow: a new scheme may override the Dewey debate.(The NEXT BIG Thing)(Dewey Decimal System)**

Harris, Christopher  
School Library Journal, March, 2013, Vol.59(3), p.16(1)

[find it](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#)

Full text available at: [Academic OneFile](#)  
Available from 2000

Full text available at: [General Business File ASAP](#)  
Available from 2000

After

Links for Interface EBSCOhost have disappeared

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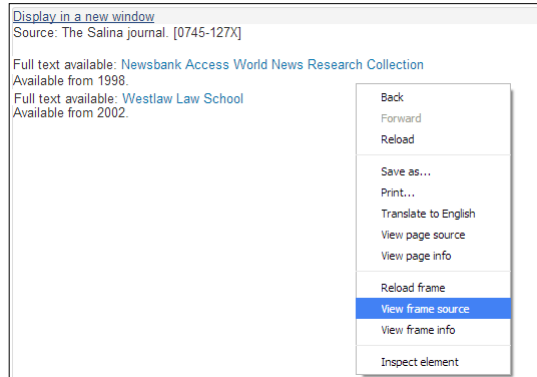
Tracing Display Logic Rules Actions

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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

```

1 <html xmlns="http://www.w3.org/1999/xhtml">
2 <!-- DEBUG:
3 <li>http://na01.alma.exlibrisgroup.com/view/uresolver/TR_INTEGRATION_INST/openurl?
4   svc_dat=CTO&debug=true&debug=true&u.ignore_date_coverage=true&rft.mms_id=9933471100561&rft_id=info:sid/primox
5 END DEBUG-->
6 <head>
7   <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
8   <title>Home</title>
9
10  <link href="/view/skins/default/css/otb_mashup.css" rel="stylesheet" type="text/css" />
11  <link href="/view/branding_skin/css/mashup.css" rel="stylesheet" type="text/css" />
12
13  <script type="text/javascript" src="/view/javascript/jquery.js"></script>
14  <script language="javascript" type="text/javascript" src="/view/javascript/uresolverScripts.js"></script>
15 </head>
16 <body>
17 <form name="uResolverViewItForm" method="post" action="/view/action/uresolverViewit.do"><div class="tabContent v
18 <div>Source: The Salina journal. [0745-127X]</div>
21 <br/>
22 <br/>
23 <!-- if no electronic & no digital available - show this -->
24 <ul>
25   <li>
26     <a href="/view/action/uresolver.do?operation=resolveService&package_service_id=1
27     class="EXLViewOnlineLinksIconPopout"></span></a>
28     <span class="internalTitle">
29       Full text available</span>

```

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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/XMLSchema-instance">
  ▶<context_object>...</context_object>
  ▶<context_services>...</context_services>
  ▶<performance_counters>...</performance_counters>
</uresolver_content>
```

# Display Logic Rules - Tracing

```
▼curesolver_content xmlns="http://com/exlibris/urm/uresolver/xmlbean
  ▼<context_object>
    ▼<keys>
      <key id="genre">journal</key>
      <key id="available_services">viewit</key>
      <key id="available_services">getit</key>
      <key id="rft.jtitle">The Salina journal.</key>
      <key id="u.ignore_af_filter">true</key>
      <key id="debug">true</key>
      <key id="customer">550</key>
      <key id="full_text_indicator">true</key>
      <key id="u.ignore_date_coverage">true</key>
      <key id="internalAccess">true</key>
      <key id="abbrevTitle">The Salina journal.</key>
      <key id="stitle">The Salina journal.</key>
      <key id="rft.pubdate">Vol. 40, no. 245 (Oct. 13, 1925)-</key>
      <key id="licenseEnable">false</key>
      <key id="ctx_id">104538200000561</key>
      <key id="rft.issn">0745-127X</key>
      <key id="journalTitle">The Salina journal.</key>
      <key id="institution">561</key>
      <key id="efx.sid">primo.exlibrisgroup.com</key>
      <key id="rft.object_type">JOURNAL</key>
      <key id="rft.mms_id">9933471100561</key>
      <key id="rft.oclonum">8801309</key>
      <key id="rft.genre">journal</key>
      <key id="rft.stitle">The Salina journal.</key>
      <key id="req.id" xsi:nil="true"/>
      <key id="rft.title">The Salina journal.</key>
      <key id="ISSN">0745-127X</key>
      <key id="rft.rft">primo.exlibrisgroup.com</key>
      <key id="rft_id">info:sid/primo.exlibrisgroup.com</key>
      <key id="inventory_id">519453220000561</key>
      <key id="mms_id">9933471100561</key>
      <key id="objectType">JOURNAL</key>
    ▼<key id="Incoming URL">
      http%3A%2F%2Fna01.alma.exlibrisgroup.com%2Fview%2Furesolver%2F
    </key>
  </keys>
</context_object>
```

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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/XMLSchema-instance">
  ><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>
  
```

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## Display Logic Rules - Tracing

```

▼<uresolver_content xmlns="http://com/exlibris/urm/uresolver/xmlbeans/u" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  ><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">
      ▼<keys>
        <key id="portfolio_PID">5310983710000561</key>
        <key id="cz_link_id">53100000002084174</key>
        <key id="package_name">EBSCOhost</key>
        <key id="package_public_name">EBSCOhost Newspaper Source Plus</key>
        <key id="package_display_name">EBSCOhost Newspaper Source Plus</key>
        <key id="package_internal_name">EBSCOhost Newspaper Source Plus</key>
        <key id="Filtered">true</key>
      </keys>
    </context_service>
  </context_services>
</uresolver_content>
  
```

▼<key id="Filter reason">

Display logic rule: Hide service Full Text with Interface = EBSCOhost if exists service Full Text with Interface = Westlaw

</key>

```

<key id="related_title">@TITLE (@RelationType)</key>
<key id="is_related_service">>false</key>
<key id="is_closely_related">>false</key>
<key id="license_exists">>false</key>
<key id="crossref_enabled">no</key>
<key id="character_set">null</key>
<key id="interface_name">EBSCOhost</key>
<key id="is_free">0</key>
<key id="availability">Available from 2003</key>
<key id="Filtered">true</key>
  
```

▼<key id="Filter reason">

Display logic rule: Hide service Full Text with Interface = EBSCOhost if exists service Full Text with Interface = Westlaw

</key>

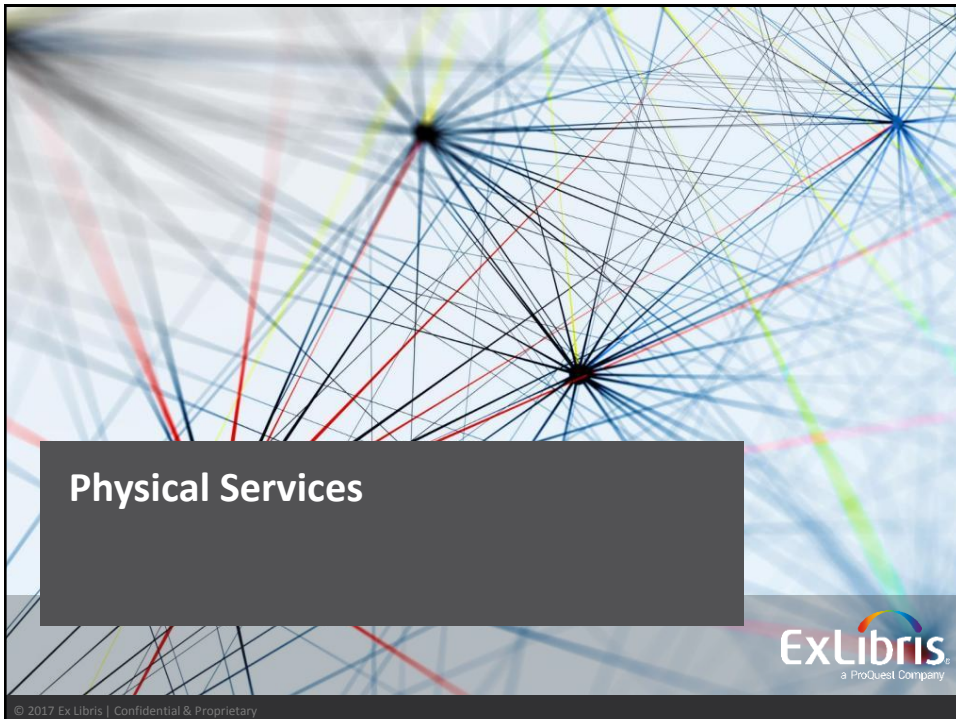
</keys>

```

  <target_url">http://search.ebscohost.com/login.aspx?direct=true&db=n5h&scope=site&jn=Salina+Journal,+The+(KS)
</target_url>
<is_error">>false</is_error>
<error_code">null</error_code>
</context_service>
  
```

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# 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

1 Results for Alma University Sorted by: Relevance

☆ Dewey decimal classification and relative index  
Melvil Dewey 1851-1931. Joan S Mitchell 2003  
● Available at Main Library General ( )

Book

Get It Locations Details Reviews & Tags

Request Options: Request Digitization Iliad(1 month): OCLC Navigator(1 month): Relais D2D(2 weeks): Resource sharing request

Location Main Library General Hide Details

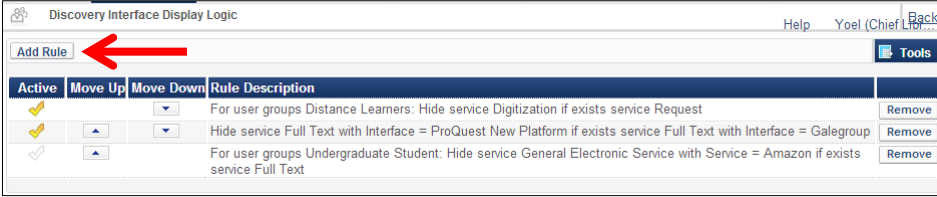
Availability: (1 copy, 1 available)

Barcode	Type	Policy	Description	Status
113767-000010	Book	4 Week		Item in place

1 - 1 of 1 Records

## Display Logic Rules - Physical

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



Discovery Interface Display Logic

Help Yoel (Chief Librarian) Back

Add Rule

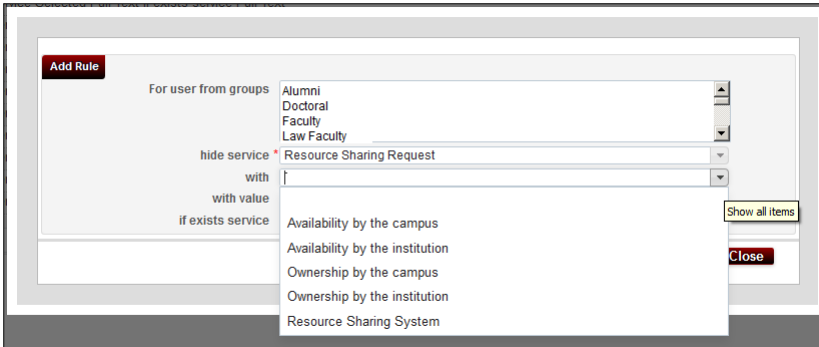
Active	Move Up	Move Down	Rule Description	
<input checked="" type="checkbox"/>			For user groups Distance Learners: Hide service Digitization if exists service Request	Remove
<input checked="" type="checkbox"/>			Hide service Full Text with Interface = ProQuest New Platform if exists service Full Text with Interface = Galegroup	Remove
<input checked="" type="checkbox"/>			For user groups Undergraduate Student: Hide service General Electronic Service with Service = Amazon if exists service Full Text	Remove

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## Display Logic Rules - Physical

- Which would look like this:



Add Rule

For user from groups

- Alumni
- Doctoral
- Faculty
- Law Faculty

hide service \* Resource Sharing Request

with

with value

if exists service

- Availability by the campus
- Availability by the institution
- Ownership by the campus
- Ownership by the institution
- Resource Sharing System

Show all items

Close

## 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

Discovery Interface Display Logic

Help Yoel (Chief Librarian) Back

Add Rule Tools

Active	Move Up	Move Down	Rule Description	
<input checked="" type="checkbox"/>			For user groups Distance Learners: Hide service Digitization if exists service Request	Remove
<input checked="" type="checkbox"/>			Hide service Full Text with Interface = ProQuest New Platform if exists service Full Text with Interface = Galegroup	Remove
<input checked="" type="checkbox"/>			For user groups Undergraduate Student: Hide service General Electronic Service with Service = Amazon if exists service Full Text	Remove
<input checked="" type="checkbox"/>			For user groups Administrative Staff, Alumni, Distance Learners, Faculty, Graduate Student, Guest, High School Students, Undergraduate Student: Hide service Resource Sharing Request with Self ownership = true if exists service Request	Remove

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## Display Logic Rules - Physical

- And now the resource sharing request links no longer exist

1 Results for Alma University Sorted by: Relevance

Book **Dewey decimal classification and relative index**  
Melvil Dewey 1851-1931, Joan S Mitchell 2003  
Available at Main Library General ( )

Get It Locations Details Reviews & Tags

Request Options: Request | Digitization |

Location Main Library General Hide Details

Availability: (1 copy, 1 available)

1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
113767-000010	Book	4 Week		Item in place

Previously resource sharing requests were here

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## Display Logic Rules - Physical

1 Results for Alma University Sorted by: Relevance

☆ Dewey decimal classification and relative index  
Mehvl Dewey 1851-1931. Joan S Mitchell 2003  
● Available at Main Library General ( )

Book

Get It | Locations | Details | Reviews & Tags

Request Options: Request | Digitization **illiad(1 month):P | OCLC Navigator(1 month):P | Relais D2D(2 weeks):P | Resource sharing request |**

Location Main Library General [Hide Details](#)

Availability: (1 copy, 1 available)

1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
113767-000010	Book	4 Week		Item in place

Before

1 Results for Alma University Sorted by: Relevance

☆ Dewey decimal classification and relative index  
Mehvl Dewey 1851-1931. Joan S Mitchell 2003  
● Available at Main Library General ( )

Book

Get It | Locations | Details | Reviews & Tags

Request Options: Request | Digitization

Location Main Library General [Hide Details](#)

Availability: (1 copy, 1 available)

1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
113767-000010	Book	4 Week		Item in place

After

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## Labels



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60

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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”

Journal of Library Science in China  
Zhongguo Tu Shu Guan Xue Hui ; Zhongguo guo jia tu shu guan 2009-  
Available at Main Library General (022.613 YLK)

Get It Locations Details Reviews & Tags

Request Options: [Request a different issue](#) | [Digitize a different issue](#) | [Illiad\(1 month\)-2](#) | [OCLC Navigator\(1 month\)-2](#) | [Relais D2D\(2 weeks\)-2](#) | [Resource sharing request](#)

Location: Main Library General 022.613 YLK

Year: All Volume: All Description: All Filter

1 - 6 of 6 Records

Barcode	Type	Policy	Description	Status	Options
YLK-20130614-05	Issue	Not loanable	Vol. 2 Iss. 2 Part 1 (2012)	Item in place	<a href="#">Request</a>   <a href="#">Digitization</a>
YLK-20130614-06	Issue	Not loanable	Vol. 2 Iss. 2 Part 2	Item in place	<a href="#">Request</a>   <a href="#">Digitization</a>

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## Labels

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

Discovery Interface Display Logic

<a href="#">Display Logic Rules</a>	<a href="#">Labels</a>	<a href="#">Related Records</a>	<a href="#">Direct Linking</a>	<a href="#">General Electronic Services</a>
<a href="#">Online Services Order</a>	<a href="#">General Electronic Services Order</a>	<a href="#">Locations Ordering Profile</a>		

Access the labels configuration

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## Labels

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

✓	c.uresolver.getit2.holding_list.empty.bottom	Having problems? Please contact the staff	-	-	Customize
✓	c.uresolver.getit2.holding_list.empty.guest	In order to receive options to request the r	-	-	Customize
✓	c.uresolver.getit2.item_list.pagination.next	Next	-	-	Customize
✓	c.uresolver.getit2.item_list.pagination.prev	Previous	-	-	Customize
✓	c.uresolver.getit2.item_list.pagination.of	of	-	-	Customize
✓	c.uresolver.getit2.item_list.non_circulating	Not loanable	-	-	Customize
✓	c.uresolver.getit2.item_list.circulating	Loanable	-	-	Customize
✓	c.uresolver.getit2.item_list.alt_call_num	Additional location information:	-	-	Customize
✓	c.uresolver.getit2.item_list.status.ITEM	Item not in place	-	-	Customize
✓	c.uresolver.getit2.item_list.status.ITEM	Item in place	-	-	Customize
✓	c.uresolver.getit2.item_list.status.INACTIV	Inactive	-	-	Customize
✓	c.uresolver.getit2.item_list.status.ACTIVE	Active	-	-	Customize

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

✓	c.uresolver.getit2.holding_list.empty.bottom	Having problems? Please contact the staff	-	-	Customize
✓	c.uresolver.getit2.holding_list.empty.guest	In order to receive options to request the r	-	-	Customize
✓	c.uresolver.getit2.item_list.pagination.next	Next	-	-	Customize
✓	c.uresolver.getit2.item_list.pagination.prev	Previous	-	-	Customize
✓	c.uresolver.getit2.item_list.pagination.of	of	-	-	Customize
✓	c.uresolver.getit2.item_list.non_circulating	For use in library	-	-	Restore
✓	c.uresolver.getit2.item_list.circulating	Loanable	-	-	Customize
✓	c.uresolver.getit2.item_list.alt_call_num	Additional location information:	-	-	Customize

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

## Labels

- The change has taken effect

☆ **Journal of Library Science in China**  
Zhongguo Tu Shu Guan Xue Hui.; Zhongguo guo jia tu shu guan 2009-  
● Available at Main Library General (022.613 YLK)

Journal **Get It** Locations Details Reviews & Tags Send to

Request Options: [Request a different issue](#) | [Digitize a different issue](#) | [Illiad\(1 month\)](#) | [OCLC Navigator\(1 month\)](#) | [Relais D2D\(2 weeks\)](#) | [Resource sharing request](#)

Location Main Library General 022.613 YLK

Year **All** Volume **All** Description **All** Filter

1 - 6 of 6 Records

Barcode	Type	Policy	Description	Status	Options
YLK-20130614-05	Issue	For use in library	Vol. 2 Iss. 2 Part 1 (2012)	Item in place	<a href="#">Request</a>   <a href="#">Digitization</a>
YLK-20130614-06	Issue	For use in	Vol. 2 Iss. 2	Item in place	<a href="#">Request</a>   <a href="#">Digitization</a>

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## Labels

☆ **Journal of Library Science in China**  
Zhongguo Tu Shu Guan Xue Hui.; Zhongguo guo jia tu shu guan 2009-  
● Available at Main Library General (022.613 YLK)

Journal **Get It** Locations Details Reviews & Tags Send to

Request Options: [Request a different issue](#) | [Digitize a different issue](#) | [Illiad\(1 month\)](#) | [OCLC Navigator\(1 month\)](#) | [Relais D2D\(2 weeks\)](#) | [Resource sharing request](#)

Location Main Library General 022.613 YLK

Year **All** Volume **All** Description **All** Filter

4 of 6 Records

Barcode	Type	Policy	Description	Status	Options
YLK-20130614-05	Issue	Not loanable	Vol. 2 Iss. 2 Part 1 (2012)	Item in place	<a href="#">Request</a>   <a href="#">Digitization</a>
YLK-20130614-06	Issue	Not loanable	Vol. 2 Iss. 2	Item in place	<a href="#">Request</a>   <a href="#">Digitization</a>

**Before**

☆ **Journal of Library Science in China**  
Zhongguo Tu Shu Guan Xue Hui.; Zhongguo guo jia tu shu guan 2009-  
● Available at Main Library General (022.613 YLK)

Journal **Get It** Locations Details Reviews & Tags Send to

Request Options: [Request a different issue](#) | [Digitize a different issue](#) | [Illiad\(1 month\)](#) | [OCLC Navigator\(1 month\)](#) | [Relais D2D\(2 weeks\)](#) | [Resource sharing request](#)

Location Main Library General 022.613 YLK

Year **All** Volume **All** Description **All** Filter

6 of 6 Records

Barcode	Type	Policy	Description	Status	Options
YLK-20130614-05	Issue	For use in library	Vol. 2 Iss. 2 Part 1 (2012)	Item in place	<a href="#">Request</a>   <a href="#">Digitization</a>
YLK-20130614-06	Issue	For use in	Vol. 2 Iss. 2	Item in place	<a href="#">Request</a>   <a href="#">Digitization</a>

**After**

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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”

Article

☐ **Jesus Christ**  
Steinarsson, Birgirorn  
Billboard, March 17, 2001, Vol.113(11), p.53

[find it](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#)

**Full text available at:** [ProQuest International Index to Performing Arts Full Text](#)  
Available from 1996

**Full text available at:** [ProQuest International Index to Music Periodicals Full Text](#)  
Available from 1996

**Full text available at:** [EBSCOhost Business Source Complete](#)  
Available from 1994

**Full text available at:** [Academic OneFile](#)  
Available from 1991

**Full text available at:** [General Business File ASAP](#)  
Available from 2000

**Full text available at:** [Lexis-Nexis Academic](#)  
Available from 1995

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## Labels

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

<input checked="" type="checkbox"/>	c.uresolver.GeneralElectronicServices	Additional services	-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	c.uresolver.ServicesForRelatedTitles	Services For Related Titles	-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	c.uresolver.availableOnline	Available Online Resources	-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	c.uresolver.availableOnline.full_text_prefix	Full text available at:	-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	c.uresolver.availableOnline.selected_full_text	Selected full text available at:	-	-	<a href="#">Customize</a>
<input checked="" type="checkbox"/>	c.search.availability.available	Available	-	-	<a href="#">Customize</a>

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

✓	c.uresolver.ServicesForThisTitle	Services For This Title	-	-	Customize
✓	c.uresolver.GeneralElectronicServices	Additional services	-	-	Customize
✓	c.uresolver.ServicesForRelatedTitles	Services For Related Titles	-	-	Customize
✓	c.uresolver.availableOnline	Available Online Resources	-	-	Customize
✓	c.uresolver.availableOnline.full_text_prefix	Link for full text:	-	-	Restore
✓	c.uresolver.availableOnline.selected_full_text	Selected full text available at:	-	-	Customize
✓	c.search.availability.available	Available	-	-	Customize
✓	c.search.availability.from	from	-	-	Customize


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

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## Labels

- See the change



**Jesus Christ**  
Steinarsson, Birgiorn  
Billboard, March 17, 2001, Vol.113(11), p.53

Article

[find it](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#)

**Link for full text:** ProQuest International Index to Performing Arts Full Text  
Available from 1996

**Link for full text:** ProQuest International Index to Music Periodicals Full Text  
Available from 1996

**Link for full text:** EBSCOhost Business Source Complete  
Available from 1994

**Link for full text:** Academic OneFile  
Available from 1991

**Link for full text:** General Business File ASAP  
Available from 2000

**Link for full text:** Lexis-Nexis Academic  
Available from 1995

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## Labels

**Before**

Article [Find it @ ExLibris](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#)

**Full text available at:** ProQuest International Index to Performing Arts Full Text  
Available from 1996

**Full text available at:** ProQuest International Index to Music Periodicals Full Text  
Available from 1996

**Full text available at:** EBSCOhost Business Source Complete  
Available from 1994

**Full text available at:** Academic OneFile  
Available from 1991

**Full text available at:** General Business File ASAP  
Available from 2000

**Full text available at:** Lexis-Nexis Academic  
Available from 1995

**After**

Article [Find it @ ExLibris](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#)

**Link for full text:** ProQuest International Index to Performing Arts Full Text  
Available from 1996

**Link for full text:** ProQuest International Index to Music Periodicals Full Text  
Available from 1996

**Link for full text:** EBSCOhost Business Source Complete  
Available from 1994

**Link for full text:** Academic OneFile  
Available from 1991

**Link for full text:** General Business File ASAP  
Available from 2000

**Link for full text:** Lexis-Nexis Academic  
Available from 1995

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## Direct Linking



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## Direct Linking

### Direct Linking


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

Discovery Interface Display Logic				
<a href="#">Display Logic Rules</a>	<a href="#">Labels</a>	<a href="#">Related Records</a>	<a href="#">Direct Linking</a>	<a href="#">General Electronic Services</a>
<a href="#">Online Services Order</a>	<a href="#">General Electronic Services Order</a>	<a href="#">Locations Ordering Profile</a>		

Access the Direct Linking rules


## 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)



☐ **Evolution of the Word: The New Testament in the Order the Books Were Written**  
 Cooper, Ilene  
 Booklist, July 1, 2012, Vol.108(21), p.4(1)

Article



[Check Print Holdings](#)
[Details](#)
[Tags](#)
[Recommendations](#)

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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



☐ **Evolution of the Word: The New Testament in the Order the Books Were Written**  
 Cooper, Ilene  
 Booklist, July 1, 2012, Vol.108(21), p.4(1)

Article


[Check Print Holdings](#)
[Details](#)
[Tags](#)
[Recommendations](#)

[View in a new window](#)

**Full text available at:** EBSCOhost Education Research Complete  
Available from 2002

**Full text available at:** Academic OneFile  
Available from 1993

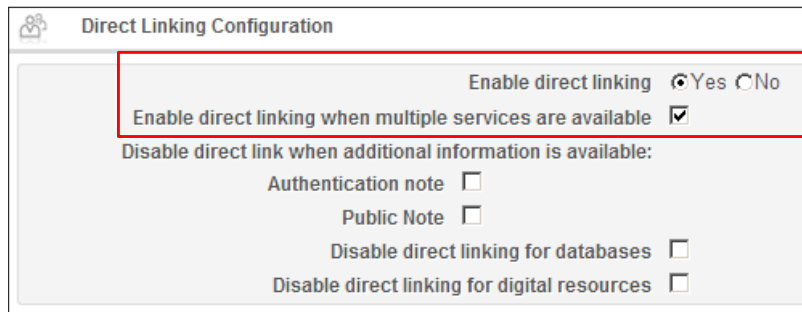
**Full text available at:** Literature Resource Center  
Available from 1993

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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



**Direct Linking Configuration**

Enable direct linking ☒ Yes ☐ No

Enable direct linking when multiple services are available ☒

Disable direct link when additional information is available:

Authentication note ☐

Public Note ☐

Disable direct linking for databases ☐

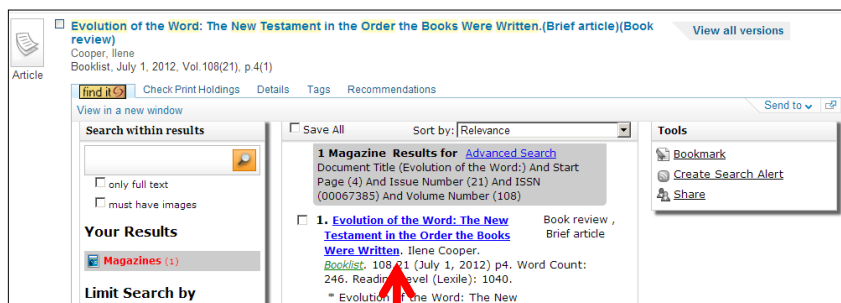
Disable direct linking for digital resources ☐

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## Direct Linking

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



**Evolution of the Word: The New Testament in the Order the Books Were Written.(Brief article)(Book review)** View all versions

Cooper, Ilene  
Booklist, July 1, 2012, Vol.108(21), p.4(1)

Find it  Details Tags Recommendations

View in a new window

Search within results

☐ only full text

☐ must have images

**Your Results**

**Magazines (1)**

**Limit Search by**

Save All Sort by: Relevance

**1 Magazine Results for Advanced Search**  
Document Title (Evolution of the Word:) And Start Page (4) And Issue Number (21) And ISSN (00067385) And Volume Number (108)

☐ 1. [Evolution of the Word: The New Testament in the Order the Books Were Written](#). Ilene Cooper. Book review , Brief article  
Booklist, 108 p4 (July 1, 2012) p4. Word Count: 246. Reading Level (Lexile): 1040.  
\* Evolution of the Word: The New

Tools

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



### Online Electronic Services Order

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


☐ **Dewey Decimal Classification system.(people)(Brief article)**  
 Library Journal, March 1, 2013, Vol.138(4), p.15(1)

[find it](#)
[Check Print Holdings](#)
[Details](#)
[Tags](#)

View in a new window

**Full text available at:** [EBSCOhost Business Source Complete](#)  
Available from 1976

**Full text available at:** [EBSCOhost Education Research Complete](#)  
Available from 1976

**Full text available at:** [EBSCOhost Library Literature & Information Science Full Text](#)  
Available from 1993

**Full text available at:** [Academic OneFile](#)  
Available from 1997

**Full text available at:** [General Business File ASAP](#)  
Available from 2000

**Full text available at:** [Literature Resource Center](#)  
Available from 1997

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

## Online Services Order

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

Discovery Interface Display Logic				
Display Logic Rules	Labels	Related Records	Direct Linking	General Electronic Services
Online Services Order	General Electronic Services Order	Locations	Ordering Profile	



Access the Online Services Order configuration

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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

[Add to top](#)

Move Up	Move Down	Service type	Service name	Service value
		Full Text	Package	Publisher
		Full Text	Interface	Miscellaneous E journals
		Full Text	Interface	Hein Online
		Full Text	Interface	Highwire Press
		Full Text	Interface	Wiley Online Library
		Full Text	Interface	Cambridge University Press
		Full Text	Interface	Springer Link
		Full Text	Interface	Elsevier ScienceDirect
		Full Text	Interface	Oxford University Press

[Add to top](#)

**Services to be placed last**

[Add to last services](#)


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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## Online Services Order

- In our example
- “EBSCOhost Business Source Complete” is at the top of the list
  - “Literature Resource Center” appears at the bottom of the list

 **Dewey Decimal Classification system.(people)(Brief article)**  
Library Journal, March 1, 2013, Vol.138(4), p.15(1)

[find it](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#)

**Full text available at: EBSCOhost Business Source Complete**  
Available from 1976

**Full text available at: EBSCOhost Education Research Complete**  
Available from 1976

**Full text available at: EBSCOhost Library Literature & Information Science Full Text**  
Available from 1993

**Full text available at: Academic OneFile**  
Available from 1997

**Full text available at: General Business File ASAP**  
Available from 2000

**Full text available at: Literature Resource Center**  
Available from 1997

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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

Electronic Collection Editor

Electronic Collection name: EBSCOhost Business Source Complete

Electronic Collection Description | **General Information** | Additional Information | Notes

**Summary and Inventory Information**

Electronic Collection type: Aggregator package

Interface Name: EBSCOhost

Services: Full Text

Process type

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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

Electronic Collection Editor

Electronic Collection name: Literature Resource Center

Electronic Collection Description | **General Information** | Additional Information | Notes

**Summary and Inventory Information**

Electronic Collection type: Aggregator package

Interface Name: Galegroup

Services: Full Text

Process type

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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”

find it	Check Print Holdings	Details	Tags
View in a new window			
Full text available at: <a href="#">EBSCOhost Business Source Complete</a> Available from 1976			
Full text available at: <a href="#">EBSCOhost Education Research Complete</a> Available from 1976			
Full text available at: <a href="#">EBSCOhost Library Literature &amp; Information Science Full Text</a> Available from 1993			
Full text available at: <a href="#">Academic OneFile</a> Available from 1997			
Full text available at: <a href="#">General Business File ASAP</a> Available from 2000			
Full text available at: <a href="#">Literature Resource Center</a> Available from 1997			

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

Dewey Decimal Classification system.(people)(Brief article)  
Library Journal, March 1, 2013, Vol. 138(4), p.15(1)

[Find it @](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#)

Full text available at: EBSCOhost Business Source Complete
Available from 1976
Full text available at: EBSCOhost Education Research Complete
Available from 1976
Full text available at: EBSCOhost Library Literature & Information Science Full Text
Available from 1993
Full text available at: Academic OneFile
Available from 1997
Full text available at: General Business File ASAP
Available from 2000
Full text available at: Literature Resource Center
Available from 1997

Before

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

Dewey Decimal Classification system.(people)(Brief article)  
Library Journal, March 1, 2013, Vol. 138(4), p.15(1)

[Find it @](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#)

Full text available at: Academic OneFile
Available from 1997
Full text available at: General Business File ASAP
Available from 2000
Full text available at: Literature Resource Center
Available from 1997
Full text available at: EBSCOhost Business Source Complete
Available from 1976
Full text available at: EBSCOhost Education Research Complete
Available from 1976
Full text available at: EBSCOhost Library Literature & Information Science Full Text
Available from 1993

After

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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

☐ **Dewey Decimal Classification system.(people)(Brief article)** [View all versions](#)  
Library Journal, March 1, 2013, Vol.138(4), p.15(1)

[find it](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#) [Send to](#) [X](#)

Available from 1976

Full text available at: [EBSCOhost Education Research Complete](#)  
Available from 1976

Full text available at: [EBSCOhost Library Literature & Information Science Full Text](#)  
Available from 1993

Full text available at: [Academic OneFile](#)  
Available from 1997

Full text available at: [General Business File ASAP](#)  
Available from 2000

Full text available at: [Literature Resource Center](#)  
Available from 1997

Full text available at: [Lexis-Nexis Academic](#)  
Available from 2001

Scroll to 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

IP Definitions	
Organization Unit Name	Law
Organization Unit Type	Library
Summary	Contact Information
Calendar Management	IP Definitions
<a href="#">Add IP Definition</a>	
IP Version	IP Match Criteria
1 IPv4	136.167.0.0-136.167.255.255

IP Definitions	
Campus Name	Main Campus
Campus Code	MAIN
General Details	Served Libraries
IP Definitions	
<a href="#">Add IP Definition</a>	
IP Version	IP Match Criteria
1 IPv4	1.10.235.14-1.10.235.66

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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

Discovery Interface Display Logic

Display Logic Rules	Labels	Related Records	Direct Linking	General Electronic Services
Online Services Order	General Electronic Services Order	Locations Ordering Profile	Other Settings	

Locations Ordering Profile

Use "IP best location" sorting ☐ No ☒ Yes

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## General Electronic Services



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## General Electronic Services

Discovery Interface Display Logic

Display Logic Rules	Labels	Related Records	Direct Linking	General Electronic Services
Online Services Order	General Electronic Services Order	Locations Ordering Profile		

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

General Electronic Services				
<a href="#">Add Service</a>				
Service Name	Service Code	Public Name	Service Description	Display Location
<a href="#">Dissertation Abs</a>	Dissertation Abs	search ProQuest Dissertations & Theses database	Related service for print Dissertation Abstracts	Viewit
<b>ProQuest Dissertations</b>	ProQuest	check ProQuest Dissertations & Theses database	ProQuest dissertation service	Viewit
<a href="#">Scanned Book Chapter</a>	Request Book Chapter	Scanned Book Chapter	Request scan of a chapter of a monograph	Getit
<a href="#">Scanned Journal Article</a>	Request Journal Article	Scanned Journal Article	Request scanned copy of an article from a journal	Getit

We will now look at ProQuest Dissertations

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## General Electronic Services

- Service details tab of General Electronic Service

<b>Service Details</b>	Service Availability Rules
Service Code * ProQuest	
Service Name * ProQuest Dissertations	
Service Description ProQuest dissertation service	
Public Name check ProQuest Dissertations & Theses database	
Public Note	
Display Location * Viewit	
URL Template * <a href="http://gateway.proquest.com/openurl?res_dat=xri%3Aapqm&amp;title={rft.atitle}&amp;rft_val_fmt=info%3Aofi%2Ffmt%3Aorg%3Atdt%3Atdt%3Ajournal">http://gateway.proquest.com/openurl?res_dat=xri%3Aapqm&amp;title={rft.atitle}&amp;rft_val_fmt=info%3Aofi%2Ffmt%3Aorg%3Atdt%3Atdt%3Ajournal</a>	
Enable without login <input type="radio"/> No <input checked="" type="radio"/> Yes	

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

Service Details

Service Availability Rules

Filter All

Add Rule

Enabled	Move Up	Move Down	Rule Name	Description	Updated By
			<a href="#">Dissertations</a>	display if genre = dissertation	Kortick, Yoel
Default Rule					
			<a href="#">Default general electronic services rule</a>	Default general electronic services rule	<a href="#">Edit</a>


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:



Dissertation

☐ **Comparison of the Effect of Using Title Keyword Searching and Subject Headings among the 10 Divisions of Dewey Decimal Classification.**  
Tsai, Shu - En  
1998

[find it](#) [Check Print Holdings](#) [Details](#) [Tags](#)

[View in a new window](#)

**Additional services**  
[check ProQuest Dissertations & Theses database](#)

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

Basic Search | Advanced ▼ | Publications | Browse

ProQuest

Citation/Abstract

☐ Add to selected items ☐ Save to My Research ☐ Email ☐ Print ☐ Cite ☐ Export/S

**Comparison of the Effect of Using Title Keyword Searching and Subject Headings among the 10 Divisions of Dewey Decimal Classification.**

Tsai, Shu-En. 1998.

☐ **Abstract (summary)** [Translate](#)

Bibliographic records taken from books listed in "OCLC Selected Titles for Research and University Libraries" are used to determine whether the use of terms in the title for subject searching is an effective alternative to the use of Library of Congress subject headings among the 10 divisions of Dewey Decimal Classification. Terms in each title are tested with term(s) in the first element of every Library of Congress subject heading. Three hypotheses are tested: (1) sciences and technology subject areas have the highest match rate; (2) match rate in the social sciences is much lower than that of sciences and technology subject areas; and (3) title keyword is an effective alternative to subject headings in sciences and technology subject areas. Among the 10 Dewey divisions, the 500 division, natural sciences and mathematics, has the highest subject heading exact match, a rate of 56.2% in this study. The 800 division, disciplines in literature and rhetoric, accounts for the lowest percentage of subject exact match, 19.04%. (Author/MES)

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## Next Steps and Support Resources



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## Next Steps and Support Resources

- [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_\(English\)/Fulfillment/080Configuring\\_Fulfillment](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/080Configuring_Fulfillment)
- [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_\(English\)/Fulfillment/080Configuring\\_Fulfillment/050Physical\\_Fulfillment#Adding\\_Fulfillment\\_Policies](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/080Configuring_Fulfillment/050Physical_Fulfillment#Adding_Fulfillment_Policies)
- [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/Alma\\_Online\\_Help\\_\(English\)/Fulfillment/080Configuring\\_Fulfillment/100Discovery\\_Interface\\_Display\\_Logic](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/080Configuring_Fulfillment/100Discovery_Interface_Display_Logic)
- 

## Q & A

**Any Questions?**





## Session Survey Evaluation

Please use the following link  
<https://www.surveymonkey.com/r/techsem2017> to provide feedback on your sessions.

