Alma Fulfillment Configuration

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Singapore
IGeLU 2019

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- Fulfillment Configurations - General
- Libraries, Locations, Circulation Desks
- Patron Configurations: Groups, Limits, Blocks
- Fulfillment Units, Fulfillment Unit Rules, Terms of Use (TOU), Policies

Fulfillment Configurations - General

Fulfillment - General

Fulfillment represents the culmination of many of the library's processes and patron-facing activities.

The infrastructure for the fulfillment workflows (which include loaning, requesting and the handling of requests, returning, reading rooms, and course reserves) involves the configuration of the following:

- Locations, circulation desks, and fulfillment units
- Service relationships and transit times between these units
- Policies and rules for loans and requests
- Resource sharing partners
- Printers
- Copyright features

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Libraries, Locations, Circulation Desks Definitions

Libraries

Organizational Levels and Alma Topologies

- Alma (and Primo, which is configured accordingly) support a number of main organization levels:
    - *Alma Institution*
    - *Alma Library*

- The *Alma institution* is the basic level of data and workflow management in Alma.
- The *Alma library* is comprised of one or more physical locations, each of which is normally housed in a single building or in several buildings in close physical proximity.
- A library may have several locations within it, such as the circulation desk and digital archiving.
- Each *Alma Institution* can have multiple *Alma libraries*.
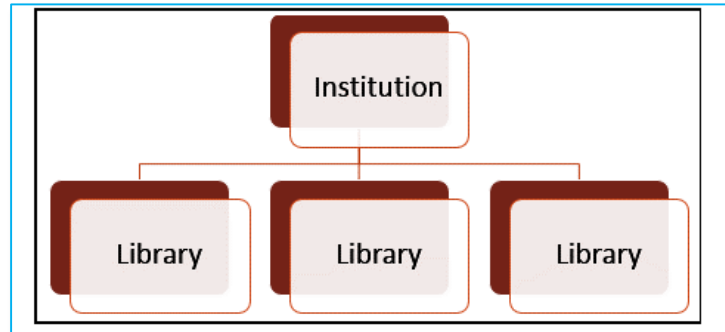
Library Configurations -> **Overview**

Library	Library Details	Library
	Opening Hours	Institution/Library
	Relationships	Library
	Transit Time	Institution
	Circulation Desks	Library
	SIP2 Bin Configuration	Institution
	Temporary Item Creation Rules	Resource Sharing Library
Locations	Physical Locations	Library
	Remote Storage	Institution

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Library configurations – library relationships

Fulfillment relationships define the services that one library is able to perform for another library within the same institution. The service options are:

- **Deliver to** (available on the library level only) – The library being configured can deliver resource sharing items for patron pickup to the specified library.
- **Circulate for** (available on the library level only) – The library being configured can check in and check out items for the specified library.
- **Acquire for** (available on both the library and institution levels) – The library or institution being configured can acquire items for the specified library.
- **Supply from** (available on the resource sharing library level only) – The resource sharing library being configured supplies items for resource sharing that come from the specified library.

Selecting **All** for any of these service options indicates that the library/institution being configured can provide the service for all libraries or receive the service from all libraries in the institution.

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Locations

- A physical location (that is, a location, shelving location, or holding) is a physical place where items are stored.
- A physical location is associated with a library, not the institution.

Note that physical locations may be located off-site in a remote location.

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Circulation desks

- A circulation desk is the place where items may be physically checked out or in, and where circulation services are rendered. Each circulation desk is associated with a library and serves particular locations in that library.

- Ensure that you are within the context of the institution/library whose circulation desks you want to configure by selecting the required institution/library from the **You are configuring** filter on the Fulfillment Configuration page.

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Libraries, Locations, Circulation Desks
Demo

Adding new libraries, locations and circulation desks

Configuring a new library incl. calendar opening hours and address information.
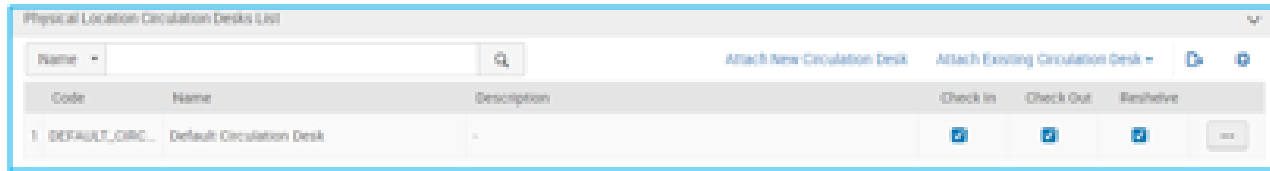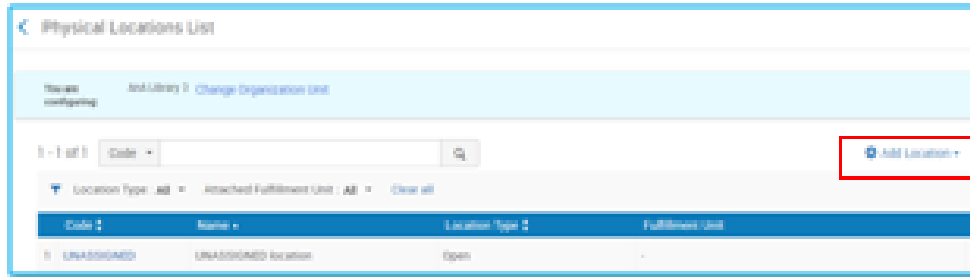
Using library code "CHEM"
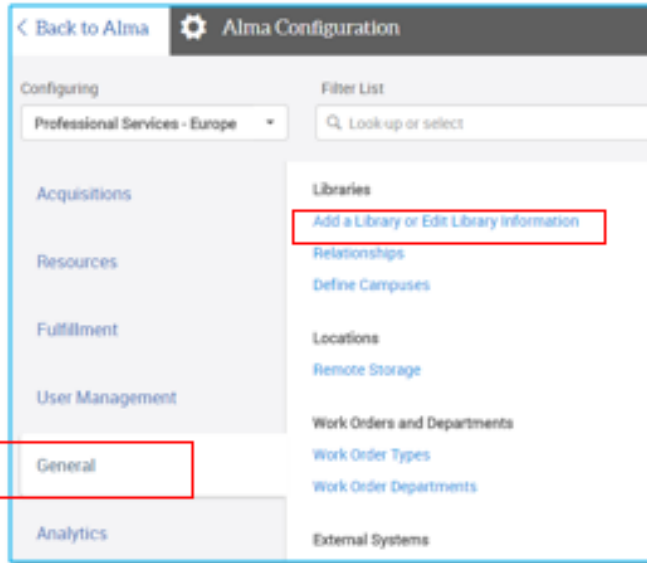
Adding new libraries, locations and circulation desks (IZ only)

Note that a default circulation desk has been automatically created for the library.
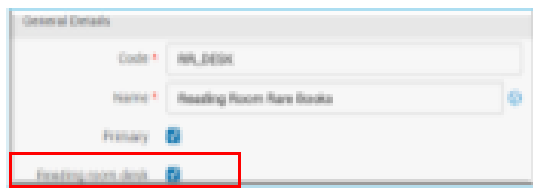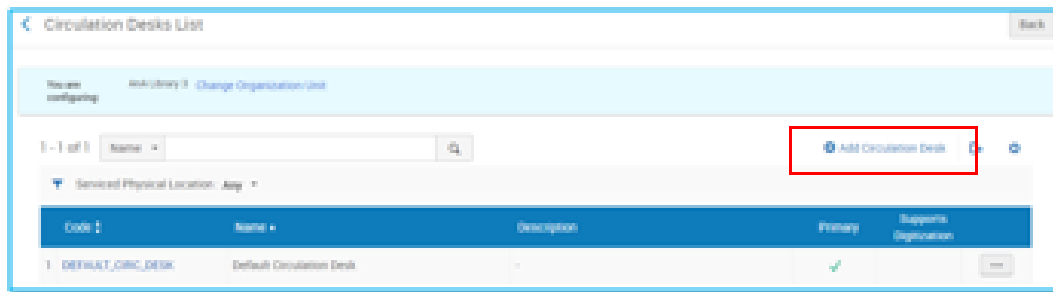
Adding new libraries, locations and circulation desks

Adding 1 new location for my new library

Adding new libraries, locations and circulation desks

Testing the configuration

a) Making sure that your user has the circulation desk manager or operator role for the new circulation desks

b) Add a new title and inventory for your new locations

c) Perform a loan on the default room circulation desk

d) Perform a loan on the reading room circulation desk

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Patron configurations: Groups, Limits, Blocks Definitions

Patron configurations (groups, limits, blocks)

Patron Configurations	Patron Groups	Institution	Configuring Patron (User) Groups
	Patron Limits	Institution	Configuring Patron Limits
	Loan Limits	Institution	Configuring Loan Limit Rules
	User Block Description User Block Definitions	Institution	Configuring User Block Descriptions and Definitions
	User Demerits	Institution	Configuring Demerit Points

Patron configurations (groups, limits, blocks) - limits

- Alma enables you to define various limits that apply to the patrons who use the services of the institution and libraries within the institution.

- Patron limits are checked and applied when a patron attempts to borrow or renew a resource from the library. When a patron reaches one of the defined limits, the patron's account is blocked.

- Patron limits are defined for groups of patrons, based on the user groups to which the patrons are assigned to.

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Patron configurations (groups, limits, blocks) - blocks

- You block users from using library services by adding *blocks*. Blocks are restrictions to a user's privileges, indicating that an issue such as fines, outstanding loans, or repeated late book returns are associated with the user. A blocked user is prevented from performing actions on items in the library, such as borrowing, renewing, and so forth.

User Bettina Schmid Is Blocked

| ⚠ | General - Patron consistently returns books late. . | ✅ | Overrideable |
| ⚠ | Overdue - Limit of 0.0 exceeded. User has 9. | ✅ | Overrideable |

Override   Cancel   OK

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Patron configurations: Groups, Limits, Blocks
Demo

Patron configurations (groups, limits, blocks)

Defining a new patron group in Alma
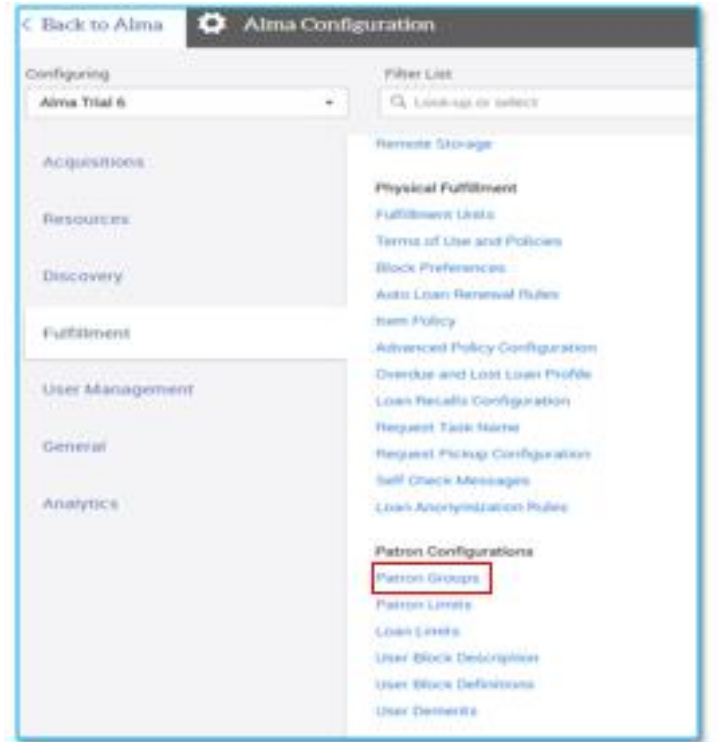
Patron configurations (groups, limits, blocks)

Defining loan limit rules for the new user group

Patron configurations (groups, limits, blocks)

Define additional limits for this user group

Patron Configurations

Patron Groups

Patron Limits

Loan Limits

User Block Description

User Block Definitions

User Demerits

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Patron configurations (groups, limits, blocks)

Reviewing the configuration table "Block Preferences". Note that for the limits block configurations , you can define who is allowed to override the blocks

16	Item is on hold shelf for another patron	Block ▼
17	Patron cash limits has exceeded	Override By Manager ▼
18	Patron's card has expired	Block ▼
19	Patron is not active	Block ▼
20	Patron loan limit exceeded	Override By Operator ▼
21	Patron overdue limits has exceeded	Override By All ▼
22	Patron overdue recall limit exceeded	Override By Manager ▼
23	Not Renewable – Item has Request(s)	Handle Automatically ▼

Patron configurations (groups, limits, blocks)

Defining a new block in Alma -> "User Block Description"

Reviewing the configuration table "User Block Definition". Defining that the block created in above step can be overridden. Defining that loans, renewals and requests are blocked.
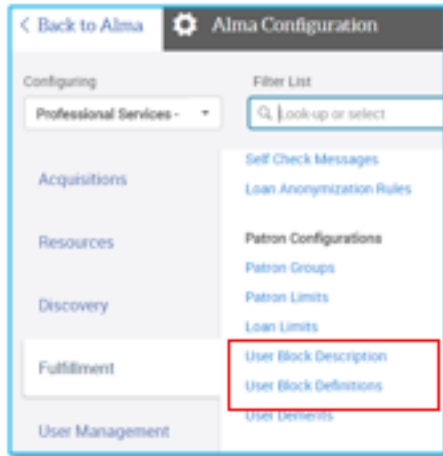
Fulfillment Units, Fulfillment Unit Rules, Terms of Use (TOU), Policies
Definitions

Fulfillment Units, Fulfillment Unit Rules, Terms of Use (TOU), Policies

Physical Fulfillment	Fulfillment Units	Institution/Library	Configuring Fulfillment Units, Policies, and Terms of Use
	Terms of Use and Policies	Institution/Library	Configuring Terms of Use
	Block Preferences	Institution	Configuring Block Preferences
	Auto Loan Renewal Rules	Institution	Configuring Automatic Loan Renewal Rules
	Item Policy	Institution/Library	Configuring Item Policies
	Advanced Policy Configuration	Institution/Library	Configuring Policies
	Overdue and Lost Loan Profiles	Institution	Configuring Overdue and Lost Loan Profiles
	Loan Recalls Configuration	Institution	Configuring Loan Recall Requests
	Request Task Name	Institution	Configuring Request Task Names
	Request Pickup Configuration	Institution	Configuring Request Pickup Rules
	Self Check Messages	Institution	Configuring Self Check Messages
	Loan Anonymization Rules	Institution	Configuring Anonymization

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Fulfillment Units, Fulfillment Unit Rules, Terms of Use (TOU), Policies

- Definition:
- A *fulfillment unit* is one or more physical locations within an institution that follow the same policies. Fulfillment units have *Terms of Use (TOU)* which define policies for patrons.

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Item policy configurations & Advanced policy configuration

Defining a new item policy in Alma
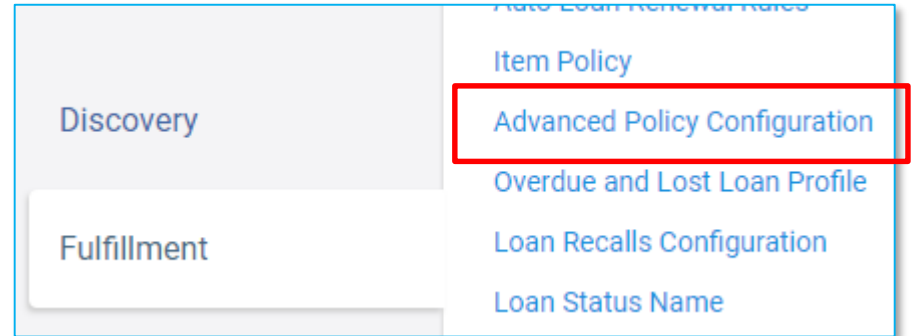
Terms of Use configurations

Defining a ToU in Alma

Terms of Use (TOU) refers to a list of policies that define the institution/library commitment to the patron according to which a service will be provided or terminated. Terms of Use are associated with a specific type of fulfillment activity, such as a loan, a request, or user registration.
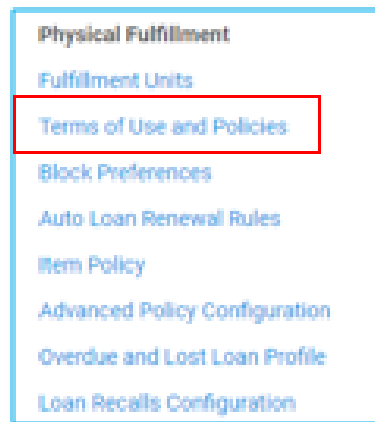
Terms of Use, Fulfillment Unit Rules Configurations

The fulfillment unit rules determine which Terms of Use to employ when delivering a particular service to the patron.

Defining a new Fulfillment unit rule of type "Loan" in Fulfillment Unit „REGULAR"

The Fulfillment Unit Rule should be valid for my new user group.

Terms of Use, Fulfillment Unit Rules Configurations

Defining a new Fulfillment unit rule of type "Loan" in Fulfillment Unit „REGULAR"

The Fulfillment Unit Rule should be valid for my new user group.

Viewing Fulfillment Configuration Information
[Link](#)
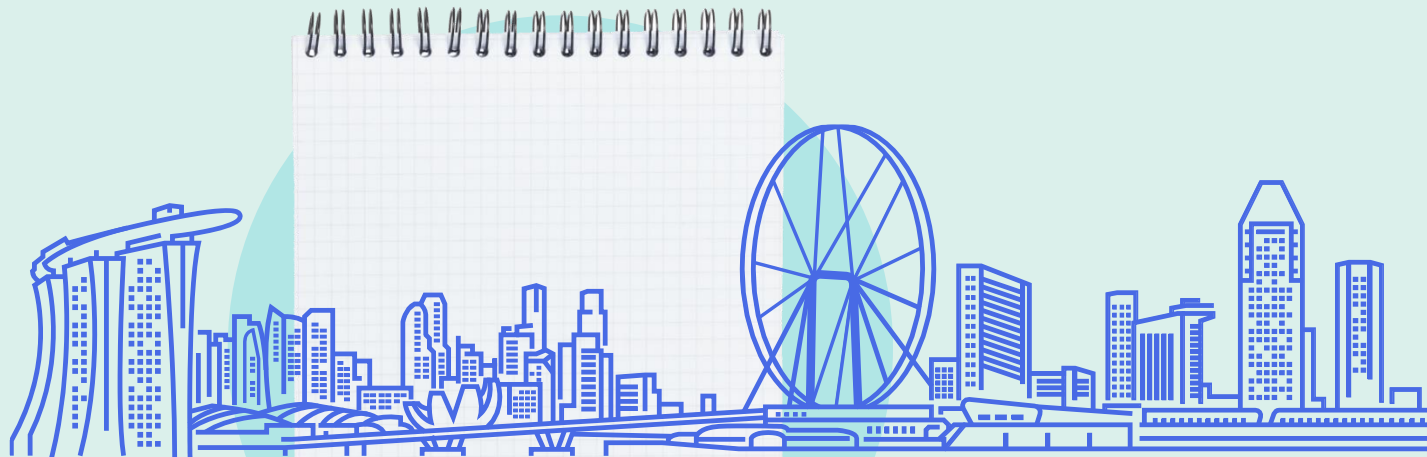
THANK YOU!

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