Fulfillment Networks

A fulfillment network defines a relationship between two or more Alma institutions that agree to provide fulfillment services to each other's patrons. It lowers the library involvement for configuration, maintenance of supplier lists, and staff mediation of requests. The fulfillment network can be set up regardless of whether the fulfillment network partners work with a Network Zone.

Unlike the classic resource sharing model, in which a patron's home library serves as an intermediary in providing access to resources it does not own, fulfillment networks allow for direct interaction between patrons of one library and another library in the fulfillment network. Fulfillment networks provide support for the following scenarios:

- Walk-in loans
- Direct requesting
- Return anywhere in the network
- Pickup anywhere in the network
- A network patron card in Primo

In a fulfillment network, the resource owning library is the patron's service provider. The resource owning library directly manages all aspects of the loan cycle with the requesting patron, including loan management (overdue, lost, renew etc.) and fine/fee related issues. The patron directly requests the resource from the library that owns the resource. The patron may request that the resource be picked up at the patron's home institution, the resource owning library, or another library within the fulfillment network.

Note

Primo configuration may be required if a single PDS installation is not shared between the member institutions that would like to allow direct requesting.

A fulfillment network has the following additional attributes:

- Limited patron information is shared between the institutions in the network.
- The inventory of each fulfillment network member institution is discoverable by patrons of all fulfillment network members.

Watch the Fulfillment Networks Resource Sharing video series (7 sessions).

For information on configuring a fulfillment network or Pickup Anywhere/Return Anywhere, see Configuring Fulfillment Networks.

Viewing Network Activities

Activity across all linked institutions can be viewed from the Patron Services page. The Network Activity tab contains the loan, request, and fines and fees balance data for the linked accounts for view purposes only. It is visible only from the patron's home institution, if the institution is part of a fulfillment network, and the staff operator has the consortial services
privilege as a part of the following roles: Circulation Desk Manager, Circulation Desk Operator, Circulation Desk Operator - Limited, User Manager, User Administrator. A filter allows the user to select transactions for a specific institution or all institutions that have a linked account for this user. All active loans and requests will automatically be displayed with no option to filter the view for this session only.

Watch the Tracking Patron Resource Sharing Activities video (2:00 min).

**Pickup Anywhere Workflow**

Creating a request within the fulfillment network, whether for pickup at a patron's home institution, the resource owning library, or another library within the fulfillment network is essentially the same process as a regular fulfillment process. The pages involved in creating and fulfilling the request stay the same, with just a variation in options offered in various drop-down lists and check boxes. The process may be just between the patron's home institution and the resource owning institution or the pickup of the requested resource may also take place at a third institution within the network. This is all handled within the standard workflow. For information on configuring Pickup Anywhere, see Configuring Pickup Anywhere/Return Anywhere.

**Requesting an Item for Pickup Anywhere in the Network**

The scenario below describes the workflow where a patron from one institution in the fulfillment network requests an item belonging to another institution in the fulfillment network to be picked up at yet a third institution in the fulfillment network. This workflow demonstrates the cross-institution request, loan, and return action.

For more information about pickup anywhere in fulfillment networks, see the Enhancements to Fulfillment Network video (1:41 min).

To request a pickup from a different institution, the patron signs in to Primo, searches for a resource, and selects from a list of institutions that have the resource available. The patron selects from the list of allowed pickup institutions and submits the request.
The patron's user information and resource request are copied to the library that owns the resource. Staff operators at that library see the requested pickup library in their task lists and pick slips.

Task List for Resource Owning Institution
Pick Slip for Resource Owning Institution

The item is scanned by the institution that owns the resource, the pickup destination is shown and the item put into transit from the institution that owns the resource to the pickup institution.

![Image of Pick Slip for Resource Owning Institution]

Scan In Item at Owning Institution

The item is received and scanned at the pickup institution with the owning institution selected.

![Image of Scan In Item at Owning Institution]

Scan in at Pickup Institution

The patron’s user information is automatically retrieved by the pickup institution and the patron is informed that their request is available for pickup. When loaning the item to the patron, the staff operator at the pickup location circulation desk selects the owning library in the Patron Services page and checks out the item to the patron. The remainder of the loan life cycle is a standard process.

![Image of Scan in at Pickup Institution]
When the patron returns the resource to the pickup institution, the item is scanned as usual with the resource owning institution selected on the Manage Item Returns page. The Manage Item Returns interface indicates that the next step for the item is to transit back to its owning institution.

Manage Item Returns

Get It at Other Institutions

Network inventory display may be based on a shared Network Zone in which all institutions take part, or based on a discovery network that is not utilizing a Network Zone. See Overview of Collaborative Networks with Primo VE for more information on the shared discovery options.

When the institution is part of a network, Primo will expose the discovered record’s inventory at the patron’s institution, as well as at other institutions of the network. The home institution’s inventory and the network institutions’ inventory are displayed in separate sections, as shown below.
Other institutions’ inventory may be displayed without allowing the patron to directly request the other institutions’ resources. For example, if the institution implements a resource sharing or automated fulfillment network, network requests are placed via the resource sharing link.

Alternatively, the institution may allow the patrons to navigate into the other network members’ inventory information and directly place a request.
Below are some of the service types an institution may set up for network requesting.

Exposé other institutions’ availability only

In this model the home institution may decide to expose only information about which institution holds available copies of the discovered resource. The institution may decide not to allow the patrons to further navigate into every institution’s holdings information. This has the benefit of allowing less navigation in the full view page, minimizing the potential confusion that multiple options may cause. With this setup the patrons will only see that institutions do or do not own available copies, and will always use the same Resource Sharing Request link for requesting. The link for the Available in institution text can be deactivated. Please consult Primo configuration guides for achieving this type of set up.

Exposé other institutions’ holdings

In this model the home institution may decide to expose, in addition to information about which institution holds available copies of the discovered resource, also where the inventory is found, but not allow directly requesting the remote institutions’ items. This would be a classic setup where the institutions allow patrons of one another to walk into each other’s library and use the on shelf items, but require that the requesting be done only using the Resource Sharing option from the local inventory display.

As is shown below, in this setup the Available in institution text does allow navigating into the network institutions’ inventory, but the remote institution’s Get It information is shown without the patron being automatically logged into that institution. This causes the following:

- The remote Get It has no request options.
• The loanability information is either loanable or not loanable, and is calculated using the same procedures that are used for determining potential loanability when the patron is not logged in.

This is achieved by setting the uresolver_remote_register parameter to None in the Configuration Menu > Fulfillment > Other Settings page. Note that this parameter takes affect for the remote institution (i.e. not the patron's home institution).

Allow directly requesting other institutions' holdings

The institutions may decide to expose not only which institution holds available copies of the discovered resource and where the inventory is found, but also allow directly placing a request on the remote item. This would be a standard setup when the institutions do not utilize a resource sharing or an automatic fulfillment network based rota, but rather allow the patrons to directly find items of other institutions and directly request them.

Require manual linked account registration

It is possible to set Alma so that when the patron chooses to display a remote institution's Get It information, the default view will be as for a non-logged user. Alma will not automatically create a linked account at the remote institution, and will therefore not display detailed terms of use and will not show a request option. A ‘Register’ option will allow the patron to explicitly request to create a linked account.
This type of set up may be done in order to make sure that linked accounts are only created when the patron explicitly requests to create them. This may serve privacy considerations, as well as prevent multiple linked accounts from being created unless the patron really wants to create a local request.

Using the ‘Register’ option creates the linked account and reloads the remote Get It information with detailed terms of use and with request options, after having created the linked account.
To do this, set the `uresolver_remote_register` parameter to `Manual` in the Configuration Menu > Fulfillment > Other Settings page. Note that this parameter takes effect on the remote institution (i.e., not the patron home institution).

**Allow automatic linked account registration**

Set the `uresolver_remote_register` parameter to `Auto` to skip the Register step and always automatically create the linked account at the remote institution. This setup streamlines the request process and skips the need to manually register before getting request options, but may result in multiple linked accounts created at every institution which the patrons has navigated into for viewing request options.