Self-Check Machines

To configure a self-check type of integration profile, you must have the following role:

- General System Administrator

To associate a self-check profile with a circulation desk, you must have the following role:

- Fulfillment Administrator

Learn about Self-Check machines in the Integration with Self-Service Systems video (23:24 mins).

Alma receives and acts upon received SIP messages from SIP 2.0 self-check machines and returns responses to these machines. For details on the integration with self check systems, see https://developers.exlibrisgroup.com/alma/integrations/selfcheck

To configure the communication between Alma and a self-check machine, you must perform the following actions:

1. Configure a self-check type of integration profile (see the procedure below).
2. Associate the self-check profile with a circulation desk (see the procedure below). The self-check machine will be able to provide services only to locations that are serviced by this circulation desk. (Note that a circulation desk, if defined as a primary circulation desk, can service other libraries – see Configuring Fulfillment Services Between Libraries Within an Institution).

---

**Note**

If your institution is in the implementation phase, you cannot perform this step. Contact your Ex Libris project manager to perform this for you.

---

3. Configure a secure transmission between Alma and the self-check machine, following the instructions located in the Ex Libris Developer Network: https://developers.exlibrisgroup.com/alma/integrations/selfcheck/stunnel. These procedures should be performed after you configure a self-check integration profile in Alma.

A separate self-check profile and corresponding certificate (see step 5) are required for each group of self-check machines that have different capabilities (for example, one for machines that support fee payments and another for machines that support only check-in/checkout). A separate profile is also mandatory for each machine that is linked to a separate circulation desk, as each profile can be linked to only one circulation desk. Note that the certificate you obtain is valid as long as the integration profile exists, regardless of any changes made to the profile.

---

**Note**

- The format of dates for self-check machine messages is determined by the system_time_format parameter (Configuration Menu > General > General Configuration > Other Settings). If this parameter contains the z symbol, the time zone is included in the date sent in self-check machine messages.
- If you want to use a self check machine to handle items from other institutions in your fulfillment network, this
To configure a self-check type of integration profile:

1. On the Integration Profiles List page (Configuration Menu > General > External Systems > Integration Profiles), select Add Integration Profile. The first page of the integration profile wizard opens.

2. Perform the following actions on this page:
   1. In the Code and Name fields, enter a code and name (respectively) for the profile you are defining.
   2. From the Integration type drop-down list, select Self-check.
   3. In the System (for Ex Libris’ informational purposes) field, indicate the type of self-check system with which you are integrating. Note that this is mandatory.
      1. If you select Other from the list of systems, the System Description field appears for further system details.
   4. Optionally, in the Description field, enter a description of the integration you are configuring

3. Select Next. The second page of the wizard opens.
4. Under **General Information**, perform the following actions:

   ◦ In the **SC Identifier** field, enter any string.

   ◦ Select whether you want the self-check machine to send the following to Alma:

     - **Error correction** – Select **Yes** for Alma to send/receive sequence numbers and checksums as part of the relevant messages. If this capability is enabled on the self-check machine, it must be enabled here as well. If you do not want to use this option, select **No** and turn it off also on the self-check machine.

     - **Alert** – Select **Yes** for Alma to send/receive alert messages.

     - **Item transfer** – Item transfer messages (not currently supported)

   ◦ **SC language** – select the language in which Alma and the self-check machine communicate.

   ◦ **Retries allowed** and **Timeout period** – enter the number of times you want Alma or the self-check machine to try to send a message following a failure of the first message to reach its destination, and the amount of time, in seconds, between each retry.

   

   **Note**

   Note that the recommended number of retries allowed is 2-5 and the recommended timeout period is 50-70 seconds.

   

   ◦ **Checkin, Checkout, Renew Policy, Fee Payments, Return Message** – Select the actions to be supported (Yes/No) between Alma and the self-check machine. (Note that **Return message** is not currently supported.)

   

   **Note**

   If you are using a 3M self-check machine, the **checkin** option must be set to **Yes**, due to a 3M requirement for enabling initial communication. If you do not want the check-in action to be allowed, ensure that you block
Extension type – select **Extended fines and fees** (Extended check-in is not currently supported) to enhance your self-check messages (SIP2) with additional fields. This option includes the following elements for each open charge in the SIP2 Patron Information Response message and allows self-check users to view this information (if available) when requested:

- **EB** - Barcode of the item that is linked to the charge (such as for an overdue/lost item)
- **ET** - Title of the item that is linked to the charge
- **EC** - Cash transaction type code
- **ED** - Cash transaction type description
- **EF** - Sum
- **EK** - Fee ID
- **BZ** - Payment transaction number

**Item Identifier** – select the type of ID—**Barcode**, **Call number**, or **Item ID**—used to match physical items when incoming messages contain item IDs.

**Authentication required** – select **Yes** if you want the patron to be required to supply a password. Note that the PIN code can be updated by the patron in Primo only if the `use_pincode_for_selfcheck_machine` parameter is set to **true** in the Customer Parameters table (see Configuring Other Settings).

**Allow Fulfillment Network Users (supported for fully unique identifiers only)** - select **Yes** for Alma to search for the user locally, then in fulfillment network members. The search stops when a match is found and the linked account is created automatically. This is only supported if user identifiers are fully unique across the fulfillment network as defined in the `network_users_unique_identifiers` parameter. See Configuring User Management. When the field is set to **No**, Alma searches only local users in response to SIP2 messages.

**The Close Process** field defines how Alma handles a currently active work order on the item (if any), or a purchase order line that is waiting to be received. For example, if the item is in acquisition and being received from the vendor, or if the item has an active work order (such as an acquisitions technical worker roder). This field enables you to to remove work orders from items by scanning their barcodes at the self check machine or to receive an ordered item at the self check machine.

- If you select **Yes**, Alma marks the existing work order as **Done**. For example, for a purchased item arriving from a vendor, Alma receives the item, just as if the user selected **Receive** on the Receive New Material page (see Receiving New Physical Material). The item is send to its permanent location (using a transit for reshelving request). If there is a different currently active work order or request on the item, then Alma marks the workflow as **Done** and continues the item's workflow.
- If you select **No**, Alma does not change the status of any existing work order. The default value is **No**.

**Prevent Requested Items Check In** – select **Yes** to prevent checking in requested items and instruct the patron to return the item at the circulation desk.

For a secure TCP connection, select **Download Certificate** to download and save the certificate so that it can be...
used when configuring Stunnel (see step 3 in the introductory section above).

5. Select **Save**. The profile you configured appears in the Integration Profile List.

**To associate a self-check profile with a circulation desk:**

1. Open the Circulation Desks List page (Configuration Menu > Fulfillment > (ensure you have selected the correct library in the location drop down list) > Library Management > Circulation Desk).

2. Select **Edit** from the row actions list for the circulation desk you want to associate with the previously defined self-check profile, or select the **Add Circulation Desk** button to create a new circulation desk with which you want to associate the self-check profile.

3. On the Circulation Desk – General Details page, under **Self-Check Information**, select the **Has self-check** check box and select a previously defined self-check profile from the **Integration profile** drop-down list. The password for the self-check machine is automatically listed in the **Terminal password** field. (For information on the other fields on this page, see Configuring Circulation Desks.)

   ![Self-Check Information Section](image)

   **Self-Check Information Section**

   Verify that the Circulation Desk associated with the self-check profile does **not** have the **Reading Room Desk** check box selected. Otherwise, items that are checked out via self-check at this desk will not get desensitized.

4. Select **Save** to store your changes to the circulation desk.